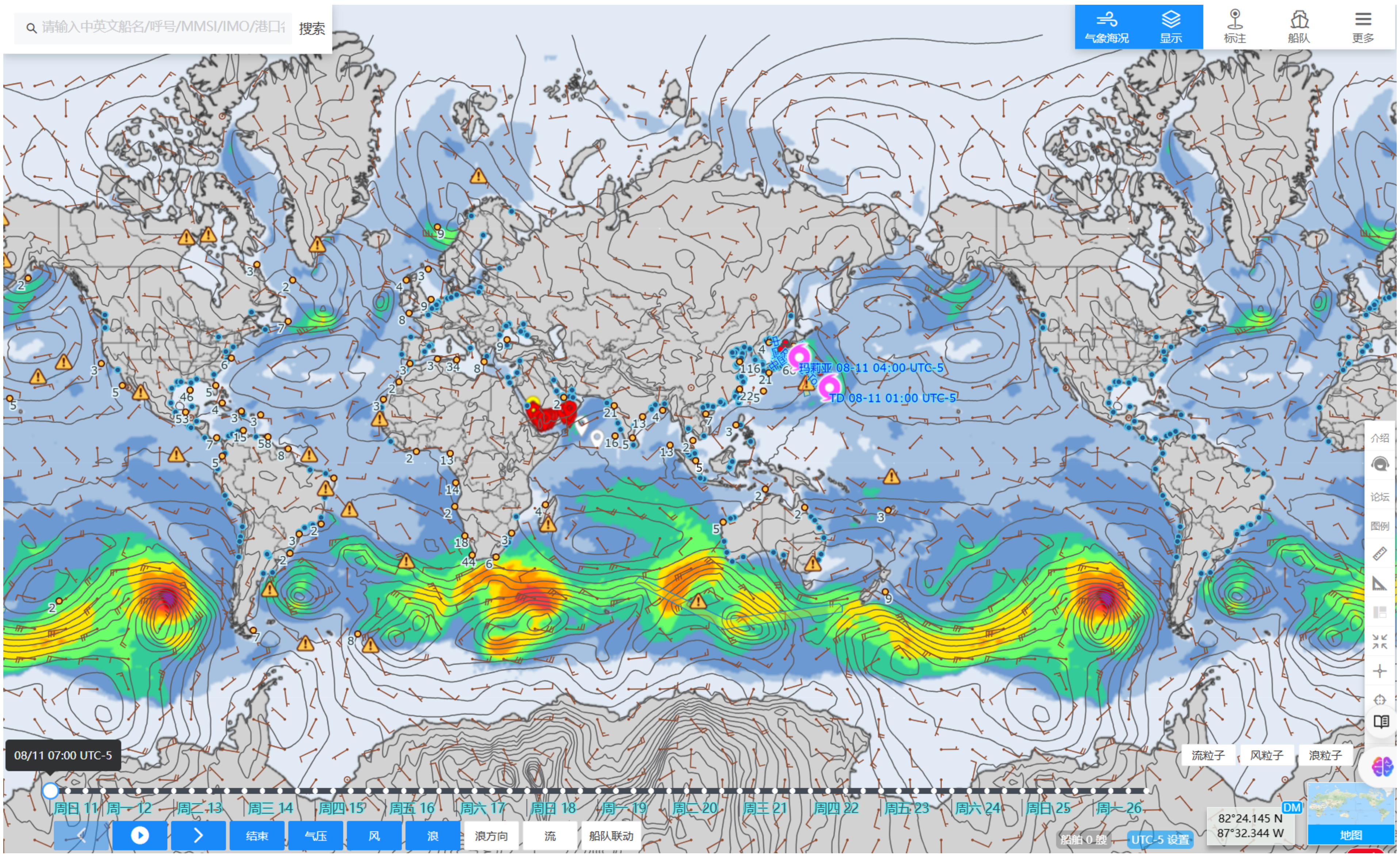
2024年
第32周市场周报

Contents

上海迈利船舶科技有限公司

第一部分 航运安全 SHIPPING SAFETY



航行警告 Navigation Warning

HiFleet显示全球目前有效的航行警告有845个，东南亚和环加勒比海居多，请相关水域船舶注意航行警告内容。 There are currently 845 navigational warnings in effect around the ocean on hiFleet with the South East and around the coastal of Caribbean Sea still being the majority. Please pay attention to the navigational warnings in relevant waters.

航海气象 Meteorology

未来一周中国渤海海域风力维持3-4级，相关海域1米轻浪；黄海风力维持3-4级，相关海域轻浪；东海风力未来将经历3-4级，相关海域轻浪；台湾海峡风力将经历4-5级，台湾海峡中浪；南海大部海域风力4-5级，中浪。西北太平洋的热带风暴和台风开始频繁发生。The coming week the wind in Bohai Sea stays gentle breeze with slight seas. Yellow Sea stays gentle breeze with slight wave. And China East Sea shall stay gentle as well with slight wave. The wind in the Taiwan Strait will experience moderate and the sea there experience moderate. In most of the South China Sea the wind is moderate with moderate sea. There are low-pressures developing frequently in the North of the Pacific Ocean.

海盗事件 Piracy

2024年8月3日印尼巴淡岛锚泊区。两名未经授权的人员登上了一艘停泊的供应船，盗走了船上的财物。盗窃事件在早晨被船员发现。03:08.2024: 2000 UTC: Posn: 01:09.7N – 103:57.7E, Batam Anchorage, Indonesia. Two unauthorised persons boarded an anchored offshore supply vessel and escaped with ship's properties The theft was discovered in the morning by the crew.

海上事件 Marine Incidents

8月9日突发，在浙江省宁波舟山港，一艘6,589 TEU 的集装箱船舶甲板前部某货柜在周五下午发生巨大爆炸，目前没有伤亡报道。On August 9th, a massive explosion occurred on the front deck of a 6,589 TEU container ship at Ningbo-Zhoushan Port in Zhejiang Province, China. There have been no reports of casualties so far.

其它 Others

没有 Nil

备注 Remark

本报告数据截止时间为2024年8月11日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。 The data deadline for this report is Beijing time 17 hours on Aug 11th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

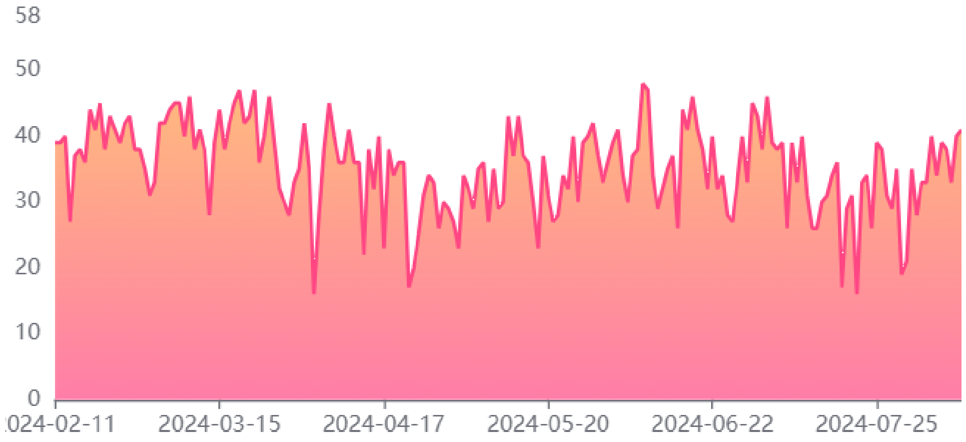
第二部分 航运数据 SHIPPING DATA

最近一周船舶运河/河口锚地等待数量

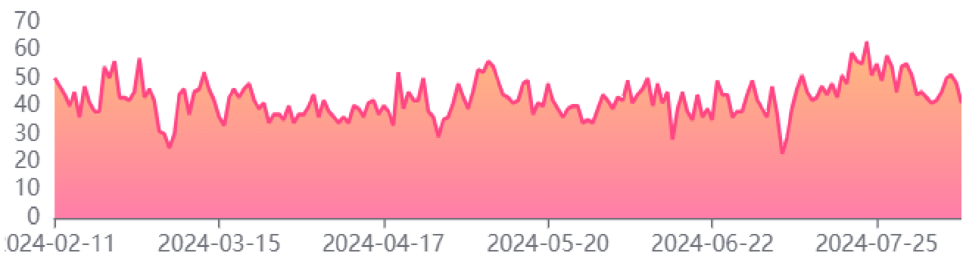
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	41	1436	-30	256
Miss.Riv.	7	106	2	54
CJK	219	6385	54	403
Pa.Atlan.	69	1688	70	173
Colum.Riv.	3	149	-16	7
Suez.Med.	41	923	65	-125
Pa.Pac.	46	1392	-22	15
ZJK	76	3127	-11	-223

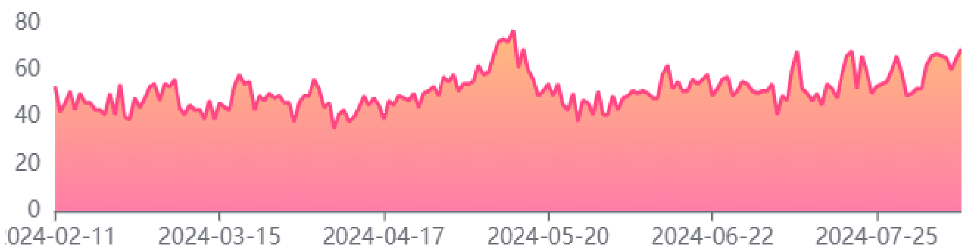
Suez(Mediterranean-Red Sea)



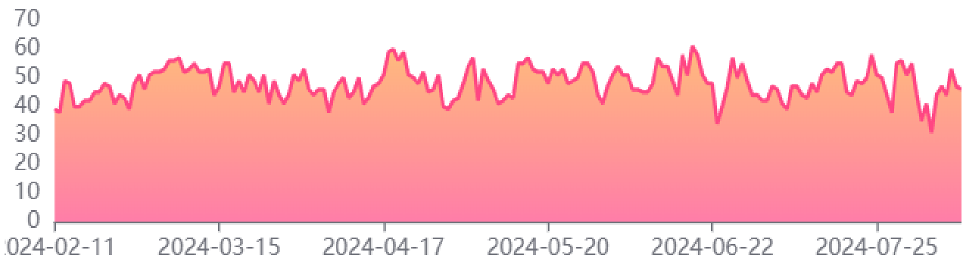
Suez(Red Sea-Mediterranean)



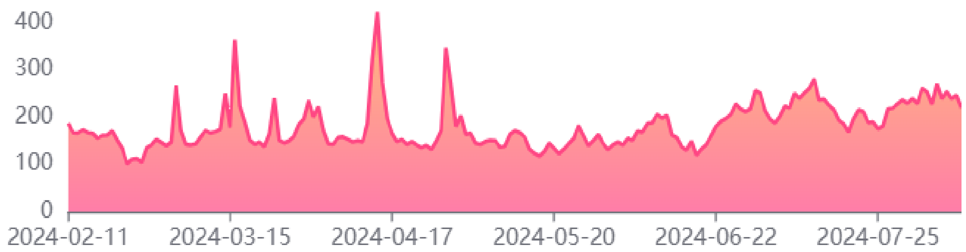
Panama(Atlantic-Pacific)



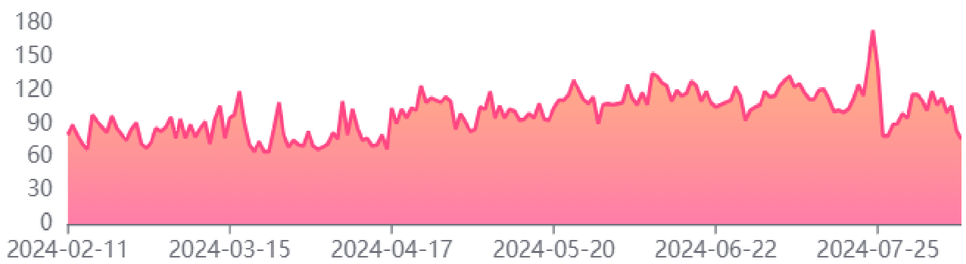
Panama(Pacific-Atlantic)



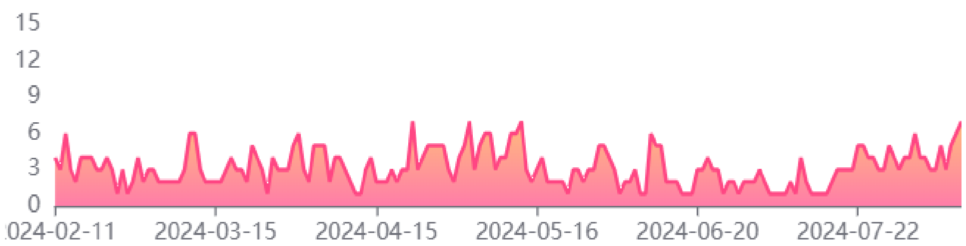
Changjiangkou(Estuary)



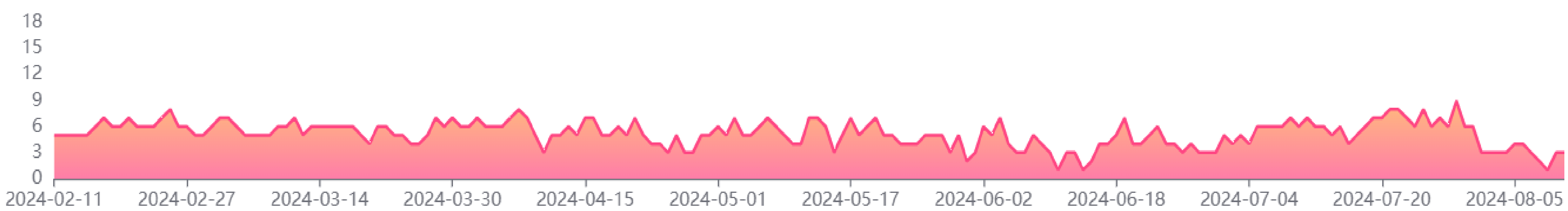
Zhujiangkou(Estuary)



Mississippi River(Estuary)



Columbia River(Estuary)

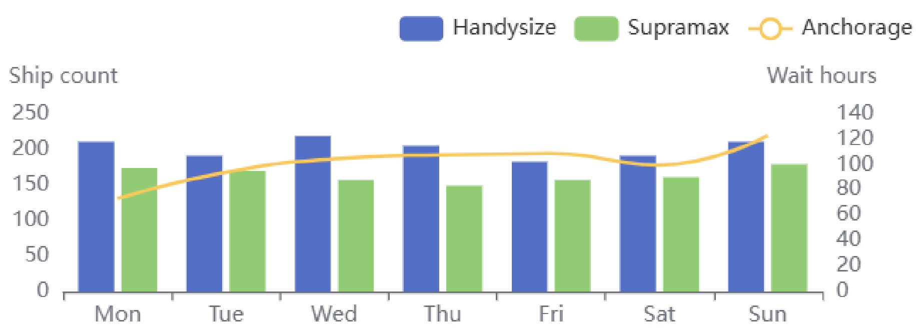


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

最近一周中国区域超大灵便型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Supra and Handy Num. and Waiting Time Information in Anchorages of China

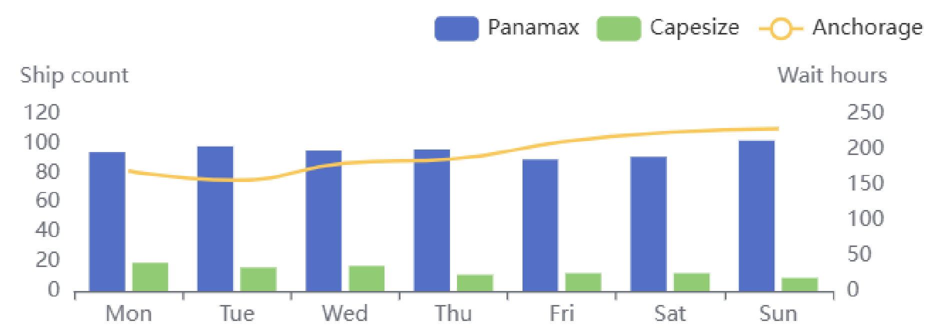
Type	M	T	W	Th	F	Sat	Sun
HDY	211	191	219	205	183	191	211
SMX	174	170	157	149	157	161	179
WT.h.	73.3	94.1	104.65	107.9	108.9	99.8	123



最近一周巴西区域好望角型和巴拿马型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Capesize and Panamax Num. and Waiting Time Information in Anchorages of Brazil

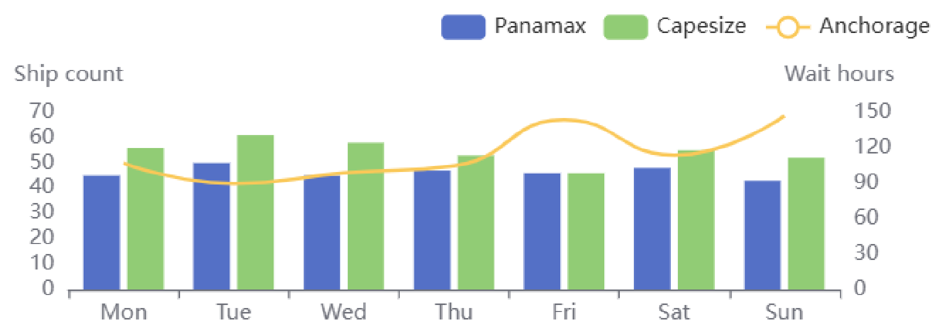
Type	M	T	W	Th	F	Sat	Sun
Pan.	94	98	95	96	89	91	102
Cap	19	16	17	11	12	12	9
WT.h.	169.4	156.3	180.3	186.3	210.3	224	229



最近一周澳大利亚区域好望角型和巴拿马型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Capesize and Panamax Num. and Waiting Time Information in Anchorages of Australia

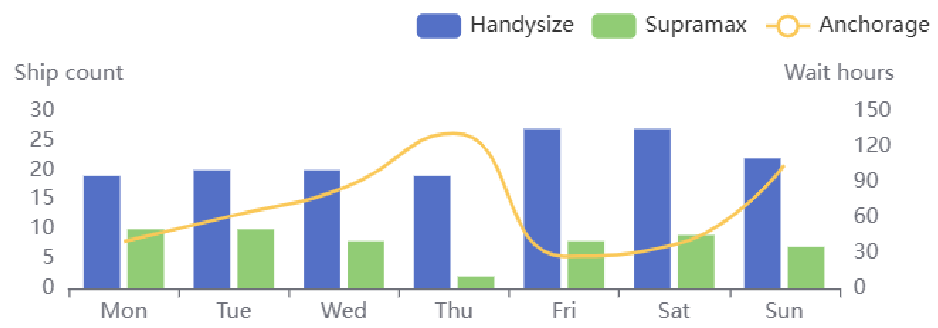
Type	M	T	W	Th	F	Sat	Sun
Pan.	45	50	45	47	46	48	43
Cap	56	61	58	53	46	55	52
WT.h.	106.9	89.6	98.7	104.6	143.7	113.7	147



最近一周黑海区域超大灵便型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Supra & Handy Num. and Waiting Time Information in Anchorages of Black Sea

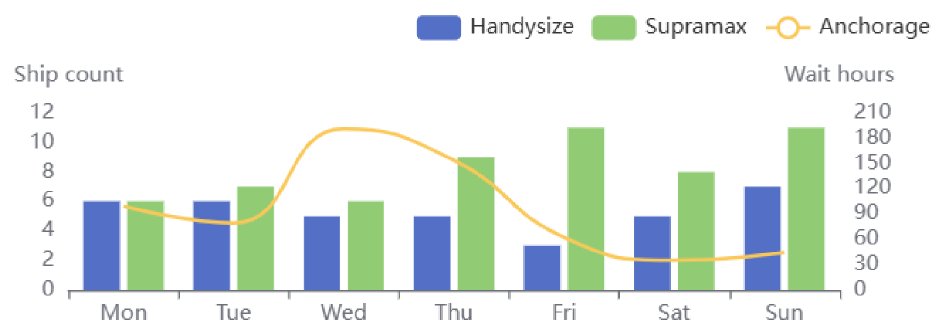
Type	M	T	W	Th	F	Sat	Sun
HDY	19	20	20	19	27	27	22
SMX	10	10	8	2	8	9	7
WT.h.	39.5	61.65	85	131.2	27.1	36.8	104



最近一周美湾区域超大灵便型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Supra and Handy Num. and Waiting Time Information in Anchorages of US Gulf

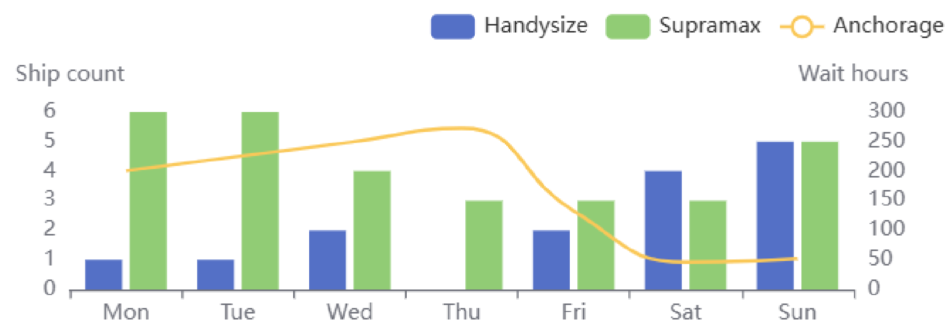
Type	M	T	W	Th	F	Sat	Sun
HDY	6	6	5	5	3	5	7
SMX	6	7	6	9	11	8	11
WT.h.	99.35	79.5	191.2	153.8	62.3	35.2	44.5



最近一周拉普拉特河区域超大型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Supra and Handy Num. and Waiting Time Information in Anchorages of Plate River

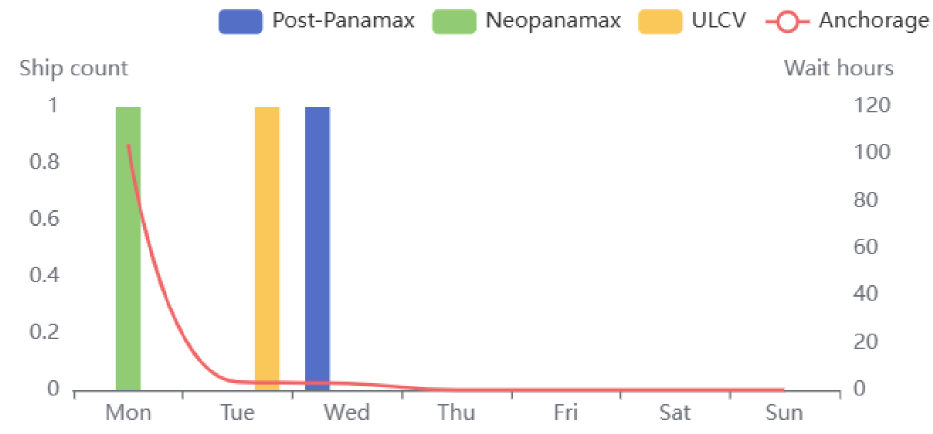
Type	M	T	W	Th	F	Sat	Sun
HDY	1	1	2	0	2	4	5
SMX	6	6	4	3	3	3	5
WT.h.	200.7	224.7	248.7	272.7	132.7	46	52



最近一周香港区域集装箱船锚泊数量和平均等待时长

Latest Week Update for Container Vessels Num. and Waiting Time Information on Anchorages of HongKong

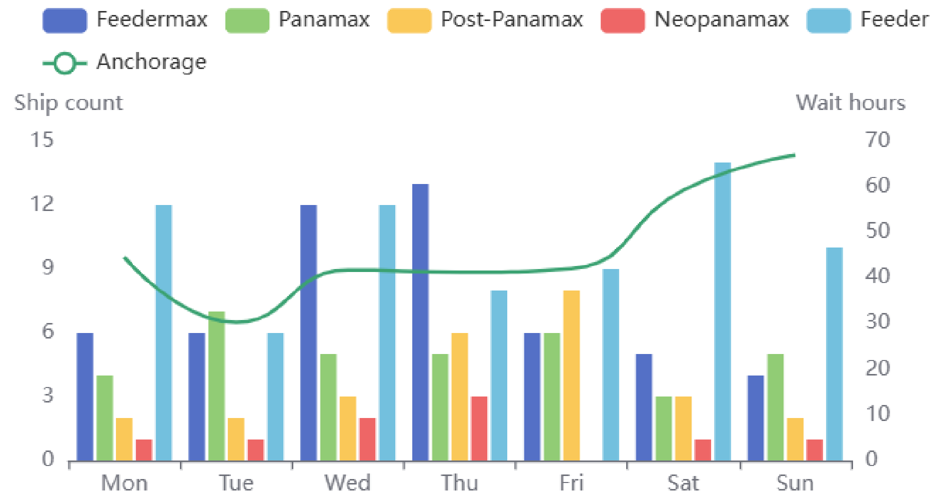
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	0	0
Pan.	0	0	0	0	0	0	0
PPx	0	0	1	0	0	0	0
NPx	1	0	0	0	0	0	0
Fd	0	0	0	0	0	0	0
WT.h.	104.1	3.4	2.8	0.0	0.0	0.0	0.0
Ulcv	0	1	0	0	0	0	0



最近一周上海区域集装箱船锚泊数量和平均等待时长

Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Shanghai

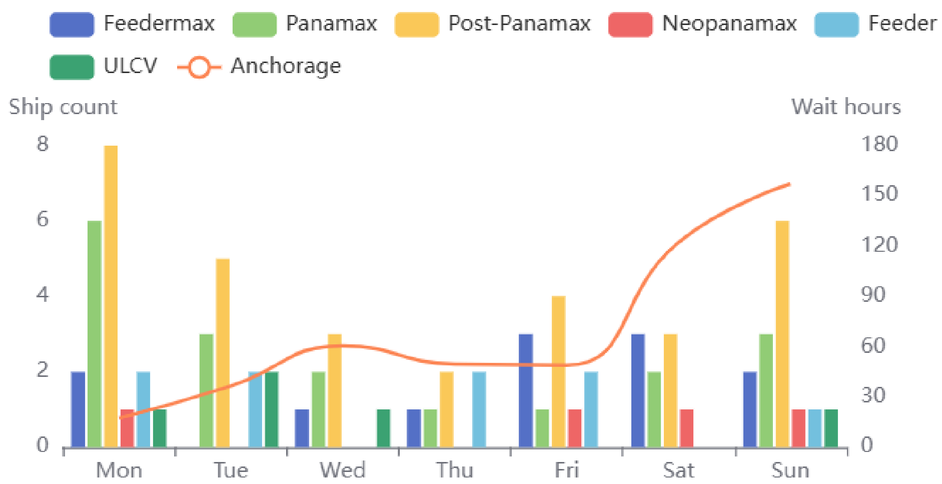
Type	M	T	W	Th	F	Sat	Sun
F.ma.	6	6	12	13	6	5	4
Pan.	4	7	5	5	6	3	5
PPx	2	2	3	6	8	3	2
NPx	1	1	2	3	0	1	1
Fd	12	6	12	8	9	14	10
Ulcv	0	0	0	0	0	0	0
WT.h.	44.6	30.3	41.8	41.3	42.1	59.3	67



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

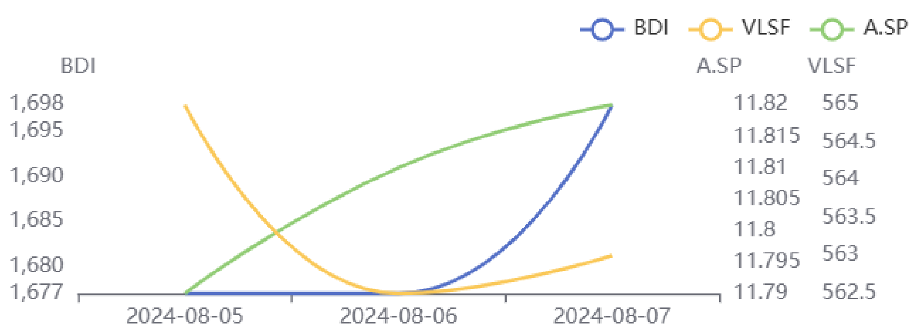
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	0	1	1	3	3	2
Pan.	6	3	2	1	1	2	3
PPx	8	5	3	2	4	3	6
NPx	1	0	0	0	1	1	1
Fd	2	2	0	2	2	0	1
Ulcv	1	2	1	0	0	0	1
WT.h.	17.3	36.5	60.5	49.55	48.9	122.2	157



最近一周空载散货船平均航速Latest Weekly Average Speed for Bulkers during Ballast Voyage

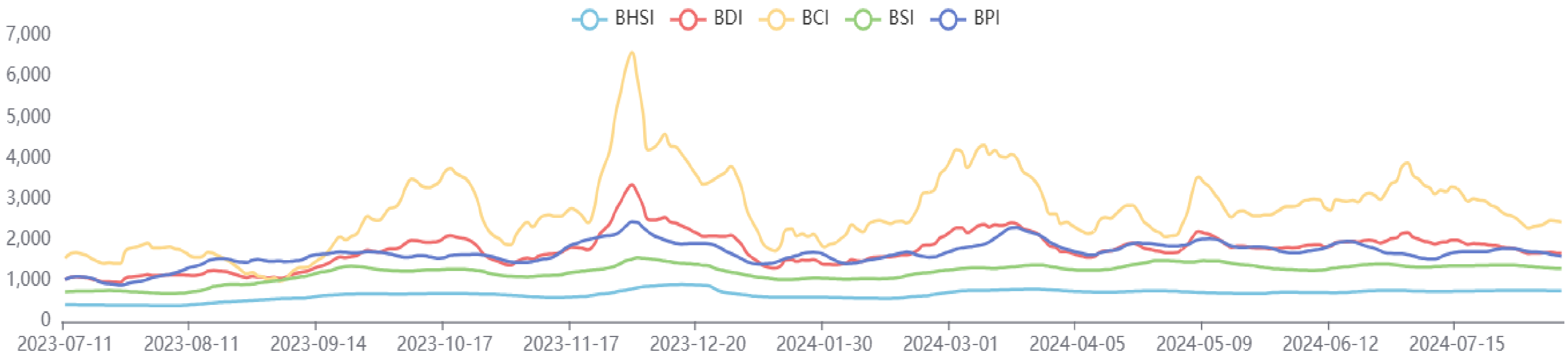
Type	M	T	W	Th	F	Sat	Sun
BDI	1697	1697	1651	1620	1599		
VLSF	565.00	562.50	563.00				
A.SP	11.79	11.81	11.82	11.81	11.81	11.78	



第三部分 航运市场 SHIPPING MARKET

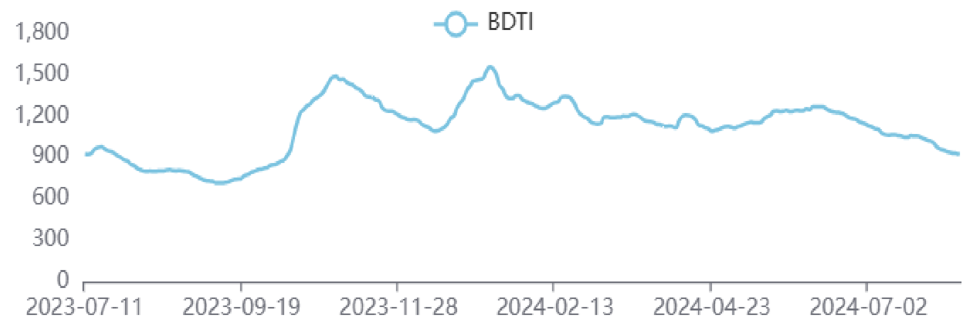
波罗的海干散货指数Baltic Dry Index

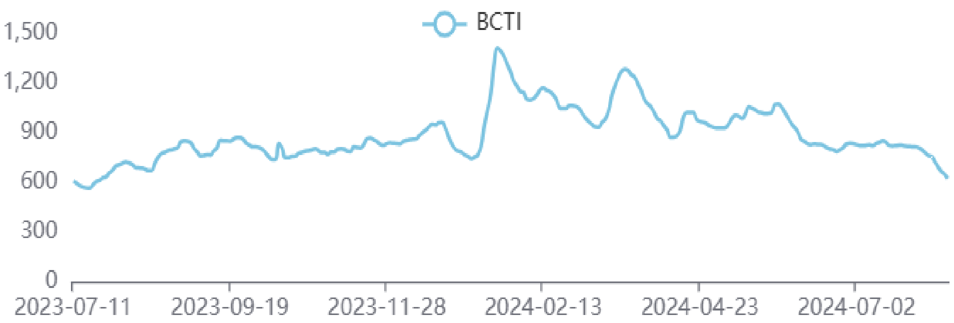
Type	PI	WoW	W%	M%	y%
BDI	1670	-5.0	-0.3	-16.37	45.98
BCI	2437	110.0	4.73	-26.06	39.1
BPI	1599	-106.0	-6.22	-4.71	29.68
BSI	1301	-41.0	-3.06	-4.62	86.93
BHSI	755	-4.0	-0.53	1.89	92.11

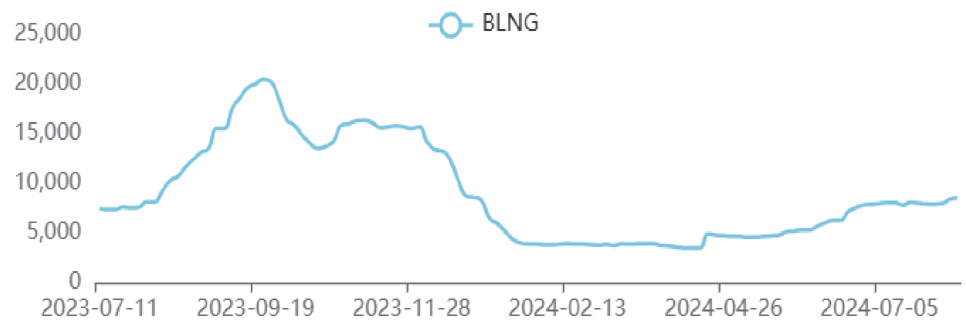


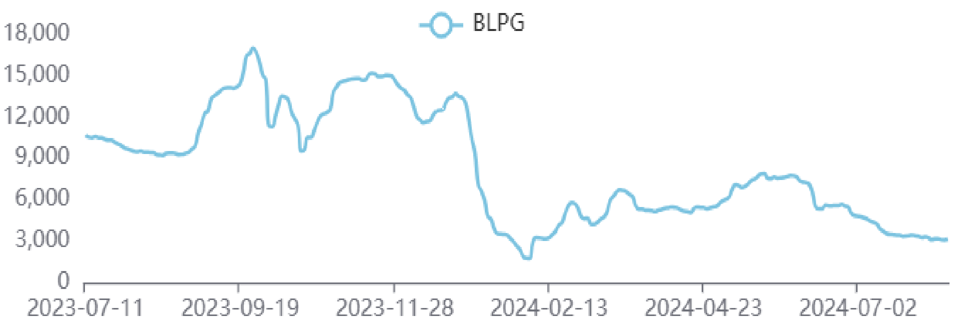
能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	922	-30.0	-3.15	-13.35	15.39
BCTI	622	-133.0	-17.62	-26.74	-9.2
BLNG	8507	564.0	7.1	5.94	-16.82
BLPG	3130	24.0	0.77	-15.27	-66.76

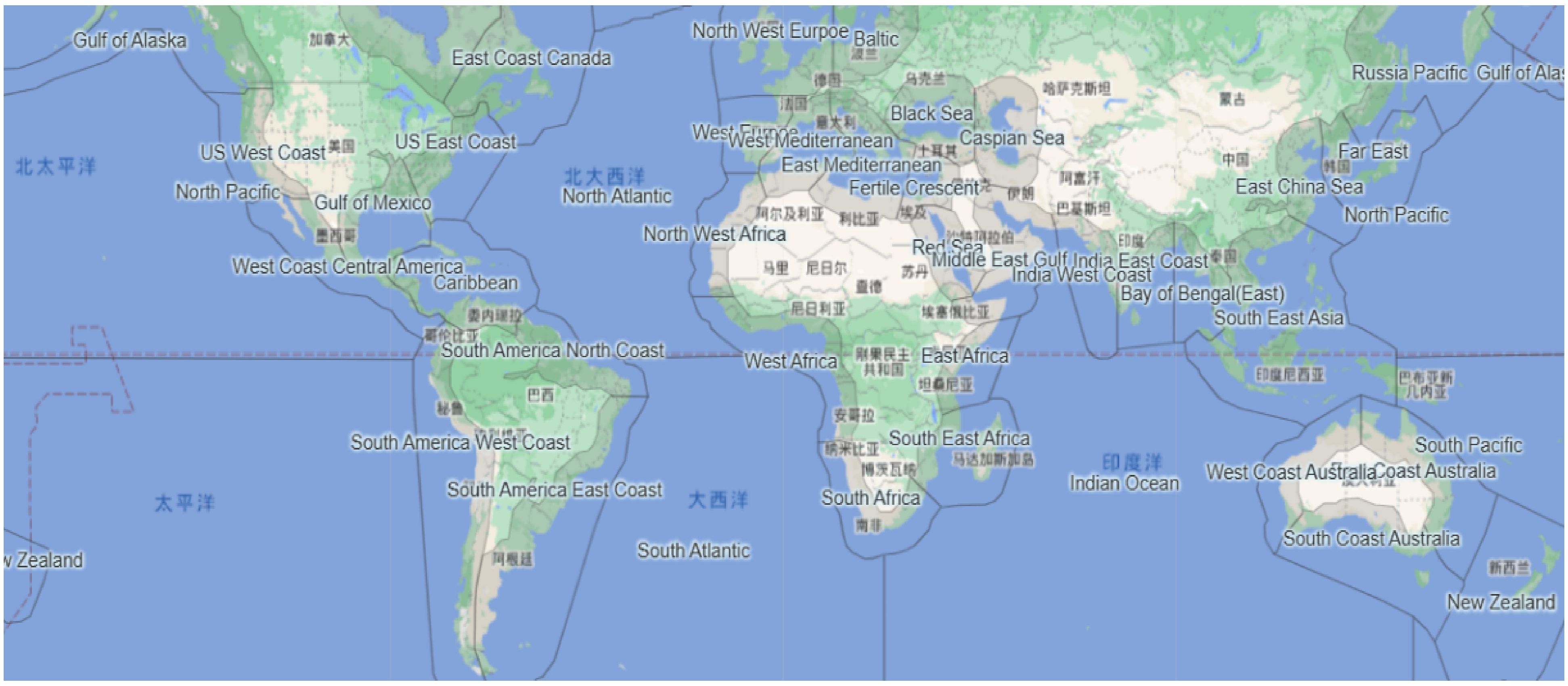








第四部分 运力分布 SUPPLY DISTRIBUTION

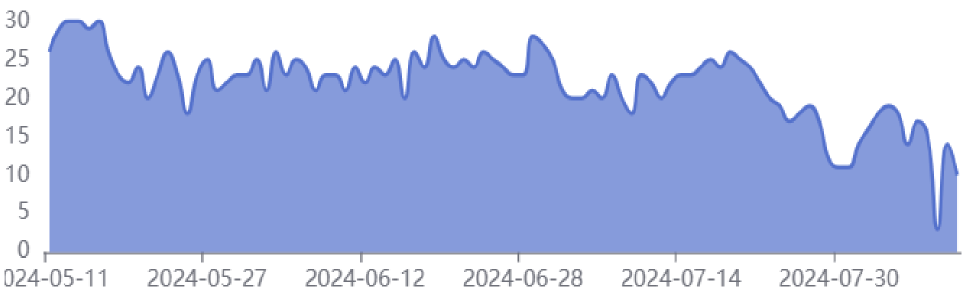


好望角型散货船 Capesize

区域：巴西，最近一周好望角型散货船准备装货船舶数量

Area: Brazil, The latest week update number for Capesize with cargo loading intention.

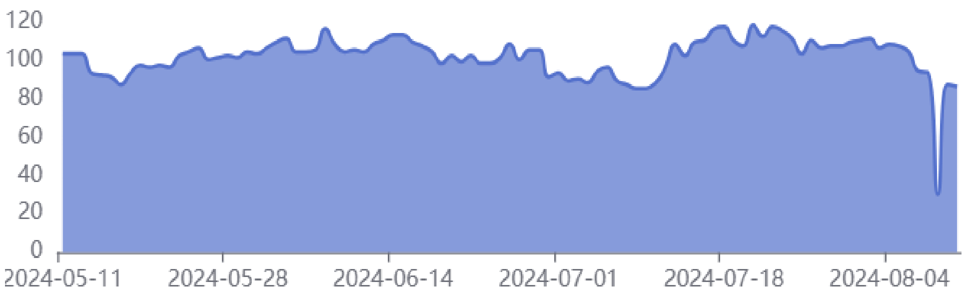
Type	M	T	W	Th	F	Sat	Sun
Cape	18	14	17	15	3	14	10



区域：澳大利亚。最近一周好望角型散货船准备装货船舶数量。

Area: Australia. The latest week update number for Capesize with cargo loading intention.

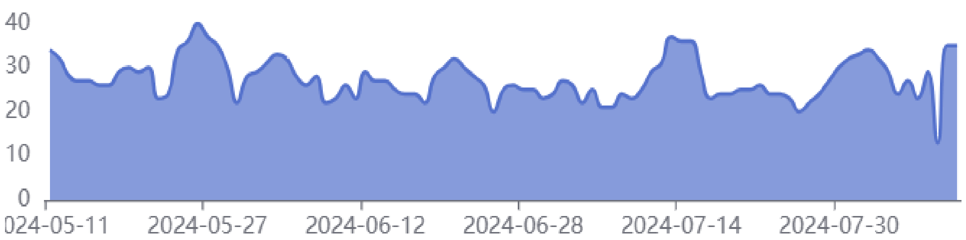
Type	M	T	W	Th	F	Sat	Sun
Cape	107	104	94	93	30	87	86



区域：南非，最近一周好望角型散货船准备装货船舶数量

Area: South Africa, The latest week update number for Capesize with cargo loading intention.

Type	M	T	W	Th	F	Sat	Sun
Cape	24	27	23	29	13	35	35

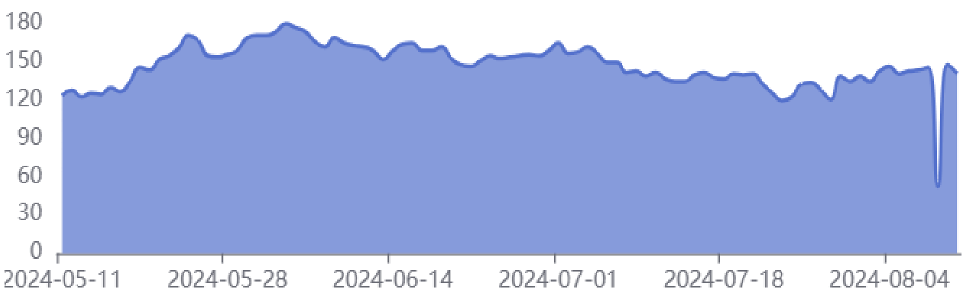


巴拿马型散货船 PANAMAX

区域：南美北部和东部。最近一周巴拿马型散货船准备装货船舶数量。

Area: South America. The latest week update number for Panamax with cargo loading intention.

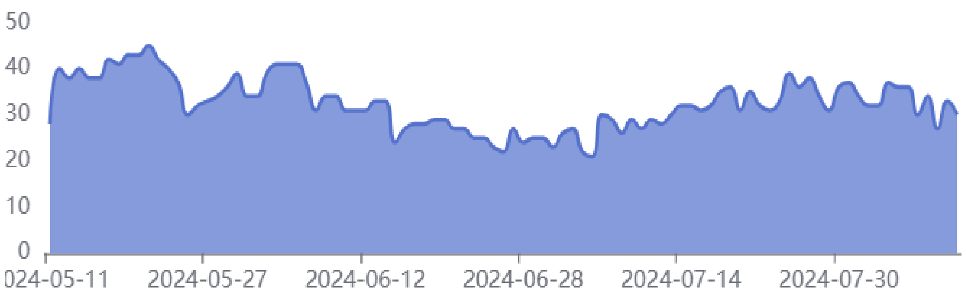
Type	M	T	W	Th	F	Sat	Sun
Pan.	140	142	143	145	52	147	140



区域：黑海。最近一周巴拿马型散货船准备装货船舶数量。

Area: Black Sea. The latest week update number for Panamax with cargo loading intention.

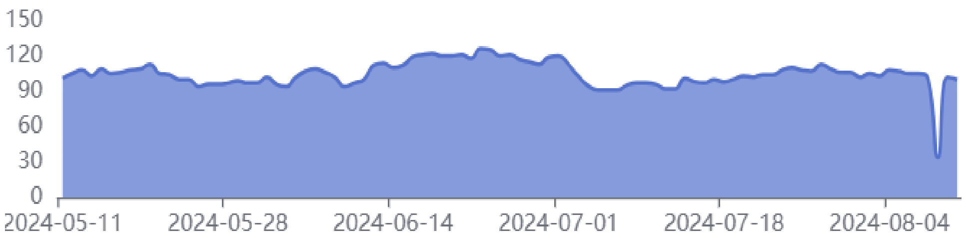
Type	M	T	W	Th	F	Sat	Sun
Pan.	18	17	17	15	8	17	19



区域：澳大利亚。最近一周巴拿马型散货船准备装货船舶数量。

Area: Australia. The latest week update number for Panamax with cargo loading intention.

Type	M	T	W	Th	F	Sat	Sun
Pan.	107	105	105	100	34	102	100

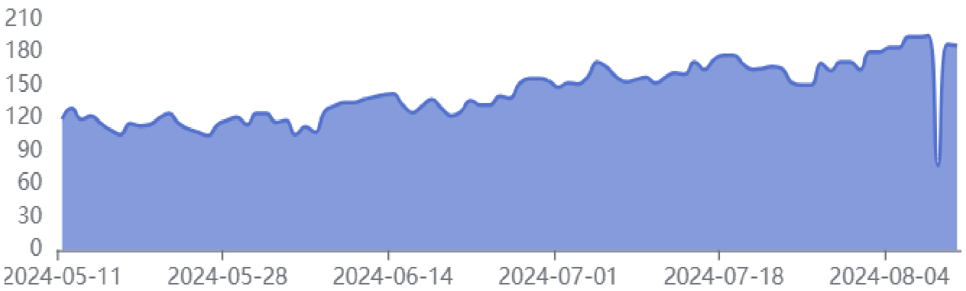


超大灵便型散货 SUPRAMAX

区域：北中国。最近一周超大灵便型散货船准备装货船舶数量。

Area: North China. The latest week update number for Supramax with cargo loading intention.

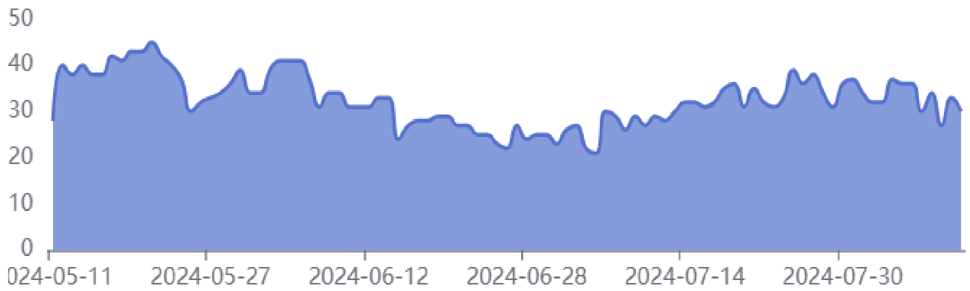
Type	M	T	W	Th	F	Sat	Sun
SMX	184	194	194	195	77	187	186



区域：黑海。最近一周巴拿马型散货船准备装货船舶数量。

Area: Black Sea. The latest week update number for Panamax with cargo loading intention.

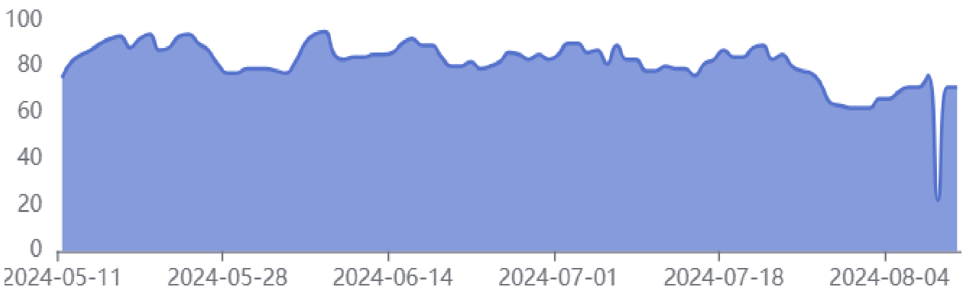
Type	M	T	W	Th	F	Sat	Sun
SMX	36	36	30	34	27	33	30



区域：美湾。最近一周超大灵便型散货船准备装货船舶数量。

Area: US Gulf. The latest week update number for Supramax with cargo loading intention.

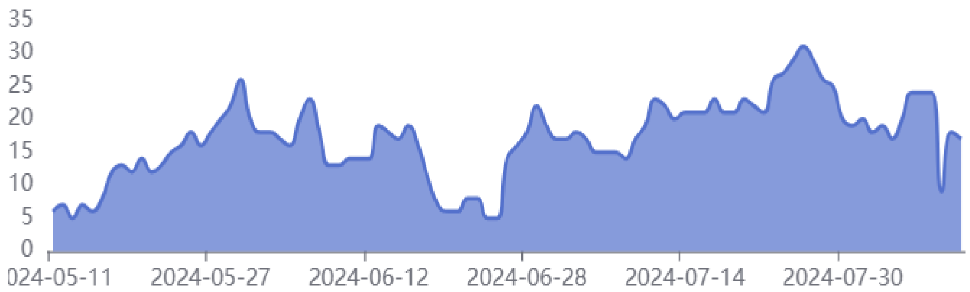
Type	M	T	W	Th	F	Sat	Sun
SMX	20	24	24	24	9	18	17



区域：南美的北部和东部。最近一周超大灵便型散货船准备装货船舶数量。

Area: South America. The latest week update number for Supramax with cargo loading intention.

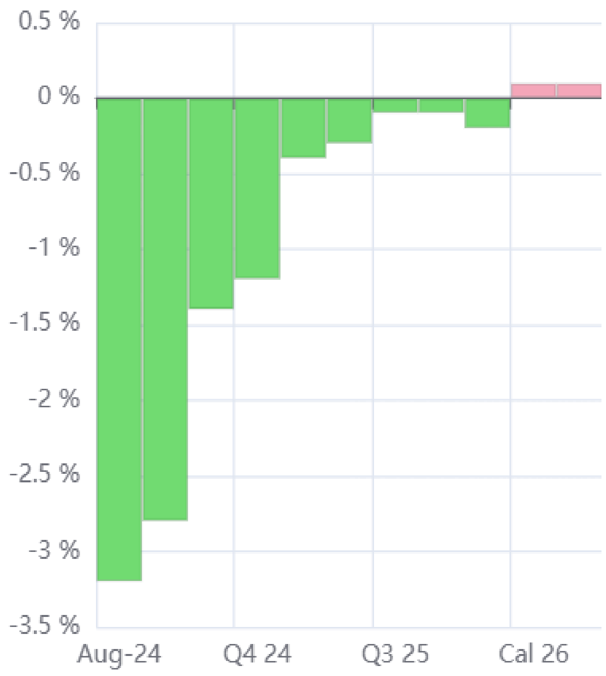
Type	M	T	W	Th	F	Sat	Sun
SMX	69	71	71	76	22	71	71

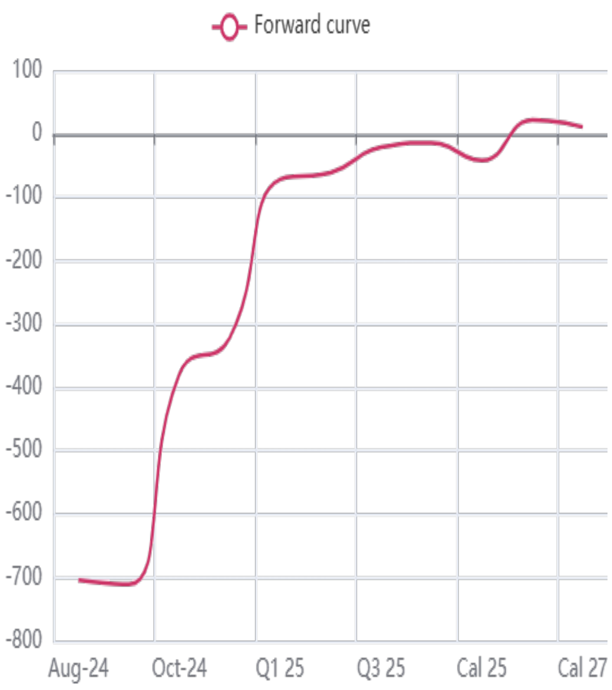


第五部分 远期运价协议 FFA

好望角型散货船Capesize

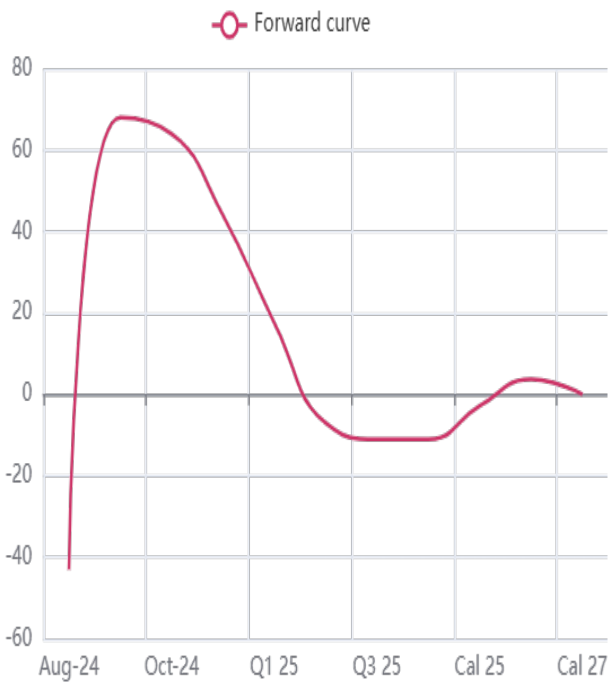
5TC	$/day	WoW	
Aug-24	21,046.00	-704.0	-3.2 %
Sep-24	24,568.00	-711.0	-2.8 %
Oct-24	27,657.00	-379.0	-1.4 %
Q4 24	26,561.67	-321.67	-1.2 %
Q1 25	16,407.00	-71.67	-0.4 %
Q2 25	21,196.00	-61.0	-0.3 %
Q3 25	24,500.00	-21.0	-0.1 %
Q4 25	24,429.00	-14.0	-0.1 %
Cal 25	21,633.00	-41.92	-0.2 %
Cal 26	21,078.75	22.0	0.1 %
Cal 27	20,075.00	11.0	0.1 %





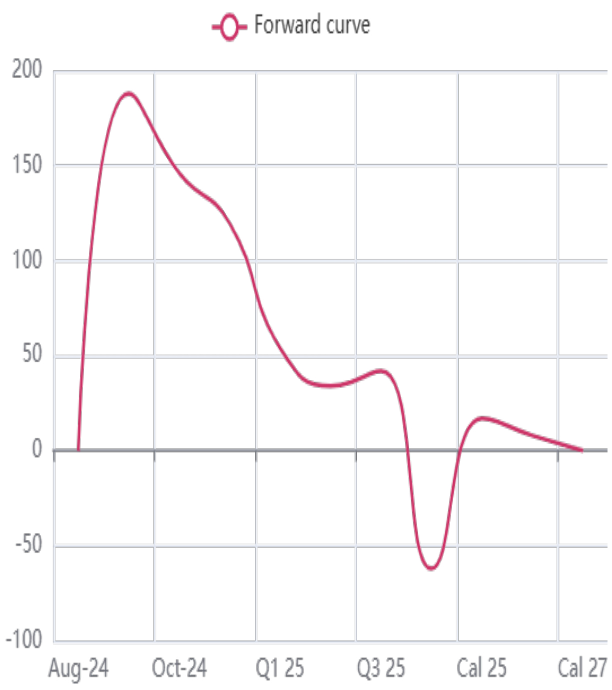
巴拿马型散货船Panamax

4TC	$/day	WoW	
Aug-24	13,186.00	-43.0	-0.3 %
Sep-24	14,029.00	68.0	0.5 %
Oct-24	15,125.00	64.0	0.4 %
Q4 24	14,923.67	44.0	0.3 %
Q1 25	12,589.00	17.67	0.1 %
Q2 25	13,857.00	-7.0	-0.1 %
Q3 25	13,571.00	-11.0	-0.1 %
Q4 25	13,271.00	-11.0	-0.1 %
Cal 25	13,322.00	-2.83	0.0 %
Cal 26	12,611.00	3.75	0.0 %
Cal 27	12,411.00	0.0	0.0 %



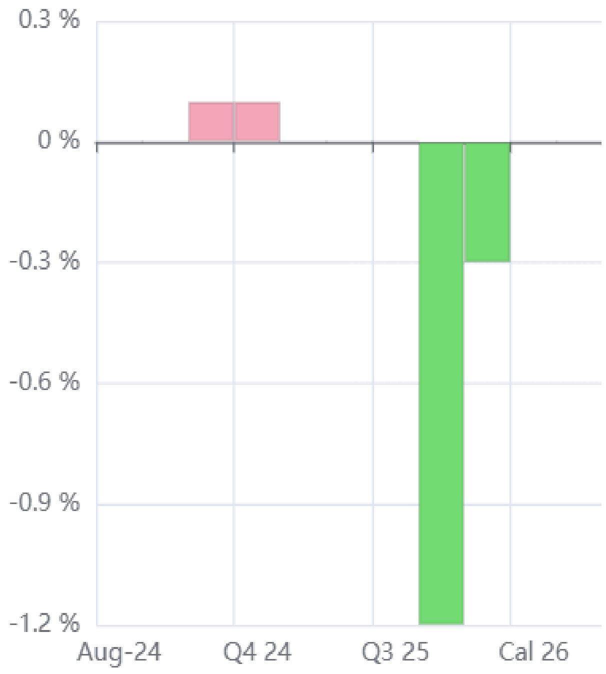
超大灵便型散货船Supramax

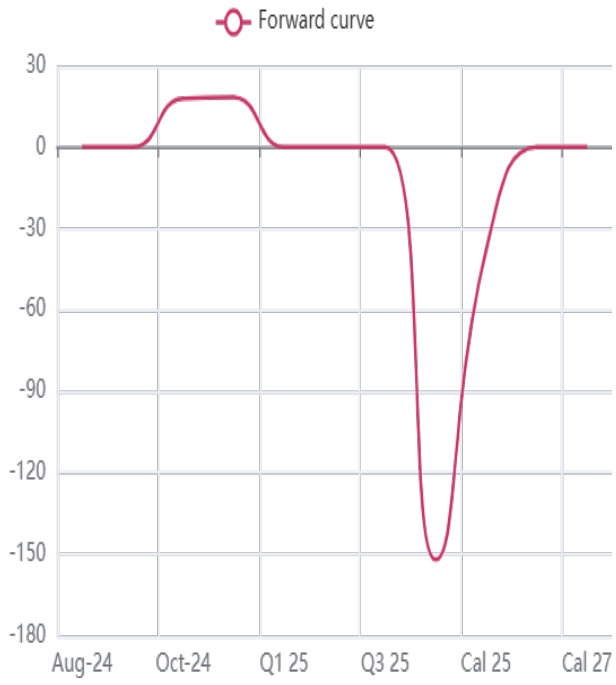
10TC	$/day	WoW	
Aug-24	14,500.00	0.0	0.0 %
Sep-24	15,092.00	188.0	1.3 %
Oct-24	15,500.00	146.0	1.0 %
Q4 24	15,072.33	119.67	0.8 %
Q1 25	12,133.00	54.0	0.4 %
Q2 25	13,442.00	34.0	0.3 %
Q3 25	13,542.00	42.0	0.3 %
Q4 25	13,451.00	-62.0	-0.5 %
13,142.00	Cal 25	17.0	0.1 %
Cal 26	12,529.00	8.0	0.1 %
Cal 27	12,250.00	0.0	0.0 %



灵便型散货船Handysize

7TC	$/day	WoW	
Aug-24	13,763.00	0.0	0.0 %
Sep-24	14,088.00	0.0	0.0 %
Oct-24	14,331.00	18.0	0.1 %
Q4 24	14,114.67	18.33	0.1 %
Q1 25	11,300.33	0.0	0.0 %
Q2 25	12,513.00	0.0	0.0 %
Q3 25	12,413.00	0.0	0.0
Q4 25	12,374.00	-152.0	-1.2 %
Cal 25	12,150.08	-38.0	-0.3 %
Cal 26	11,713.00	0.0	0.0 %
Cal 27	11,525.00	0.0	0.0 %

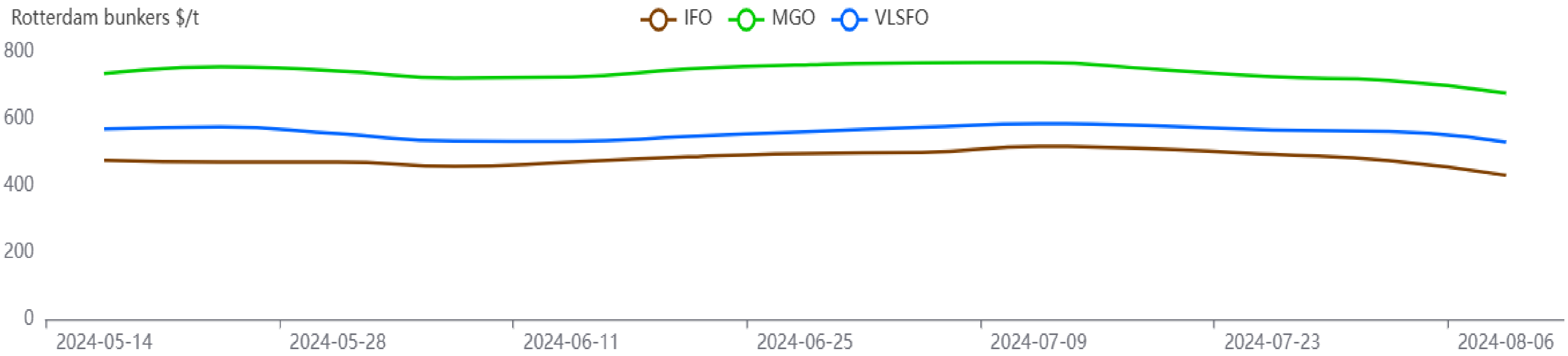


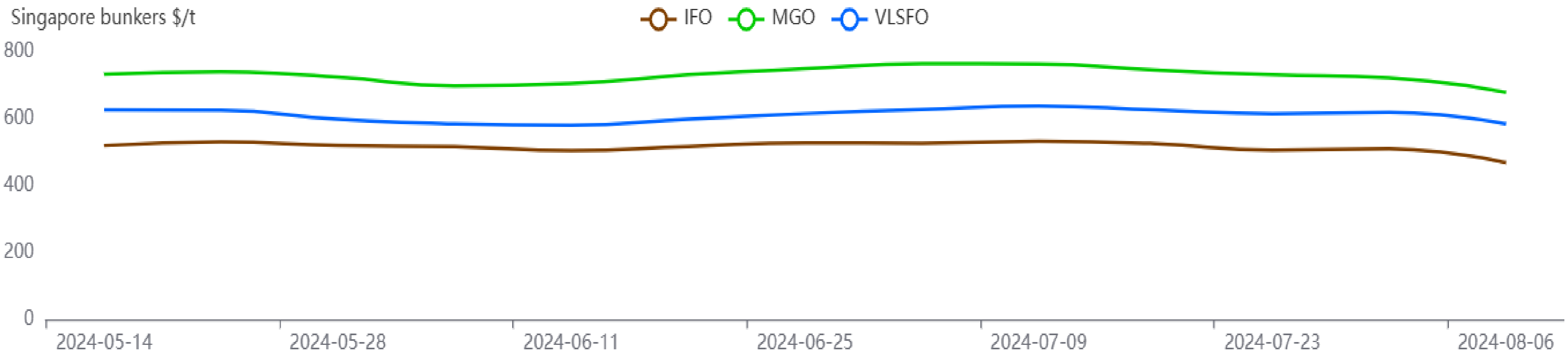


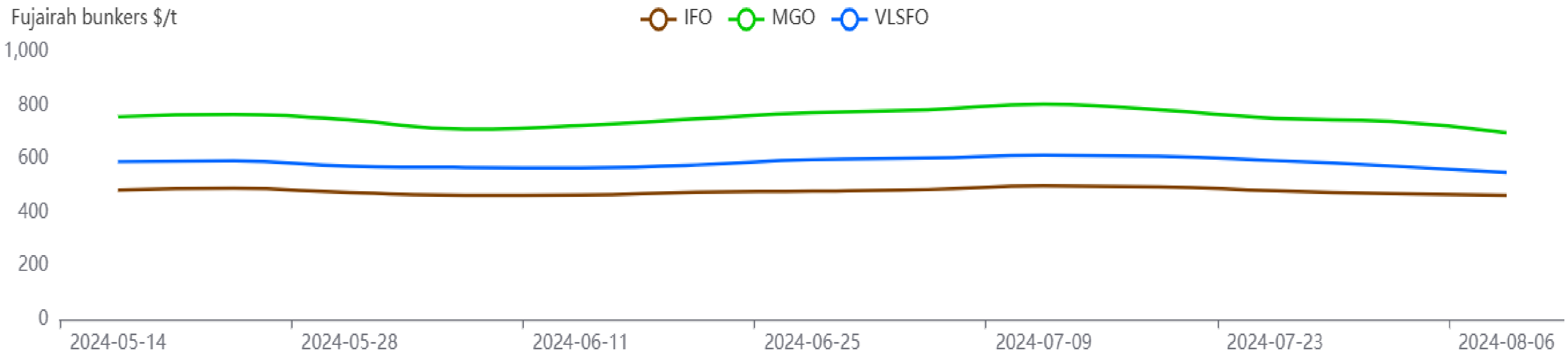
第六部分 燃油价格 BUNKER PRICE

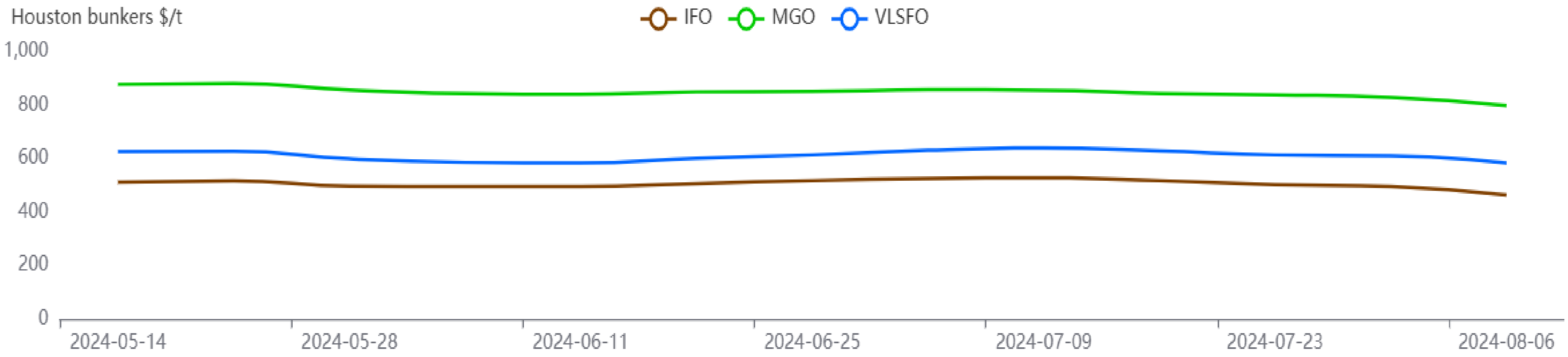
MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	594.5	496.0	738.0	98.5	5.5	5.91	4.79
Singapore	585.5	469.0	680.0	116.5	7.5	6.88	10.43
Rotterdam	531.5	431.5	678.0	100.0	12.5	14.29	45.99
Fujairah	549.5	463.5	698.5	86.0	-17.0	-16.5	-24.56
Houston	583.5	463.5	799.0	120.0	5.0	4.35	7.14

(MP-Bunkering Main Ports; LO-Heavy Low Sulphur Fuel Oil; HO-Heavy Hight Sulphur Fuel Oil; MO-MGO; SP-Spread;)





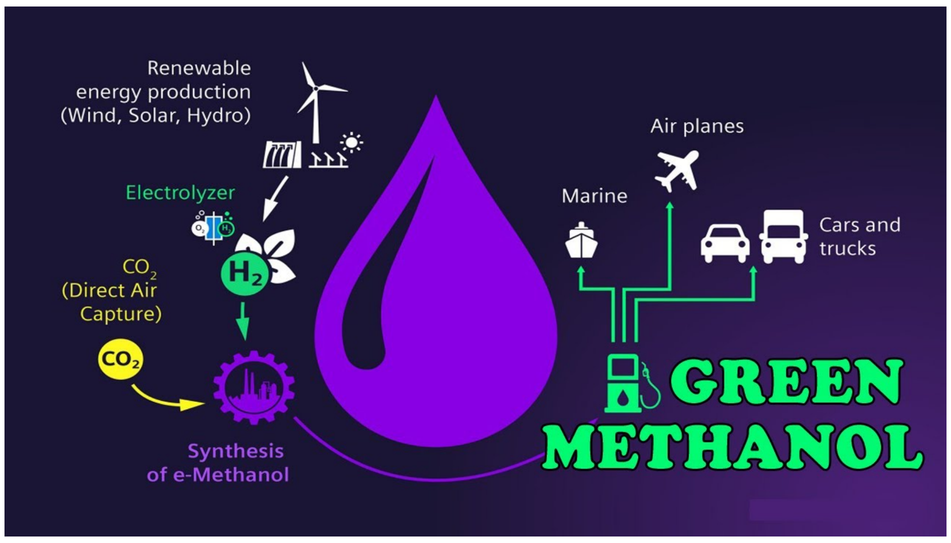




第七部分 最新商品价格 LATEST COMMODITIES PRICE

Grains and Oilseeds	Index		+/-	Weekly	Monthly	YTD
Wheat	200.0		2.0	1.01	-3.38	-19.95
Maize	202.0		0.0	0.0	2.54	-16.89
Soybeans	211.0		-2.0	-0.94	-7.46	-7.55
Rice	247.0		0.0	0.0	-0.8	-12.96
Barley	214.0		1.0	0.47	-0.47	-8.36
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	72.04	-5.3	-6.85	-12.76	-10.48
Brent	USD/Bbl	75.4	-5.89	-7.25	-12.44	-10.59
Natural Gas	USD/MMBtu	1.91	-0.16	-7.73	-17.67	-28.2
Gasoline	USD/Gal	2.27	-0.2	-8.1	-10.98	-21.18
Heating Oil	USD/Gal	2.28	-0.15	-6.17	-11.63	-22.45
Ethanol	USD/Gal	1.8	0.03	1.69	-5.26	-26.23
Naphtha	USD/T	644.69	-44.1	-6.4	-8.66	12.12
Propane	USD/Gal	0.73	-0.06	-7.59	-14.12	14.06
Uranium	USD/Lbs	82.6	0.15	0.18	-3.56	47.11
Methanol	CNY/T	2456.0	-44.0	-1.76	-2.27	7.77
TTF Gas	EUR/MWh	39.82	6.41	19.19	19.58	43.03
UK Gas	GBp/thm	89.84	11.63	14.87	15.74	28.9
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.0	-0.08	-1.96	-13.23	2.3
Coal	USD/T	144.1	4.85	3.48	6.15	7.14
Steel	CNY/T	3040.0	-15.0	-0.49	-7.18	-19.43
Iron Ore	USD/T	104.0	-2.86	-2.68	-6.57	-9.17
Aluminum	USD/T	2242.5	-25.0	-1.1	-11.54	0.47
Lithium	CNY/T	79500.0	-6000.0	-7.02	-13.11	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2419.8	28.4	1.19	1.66	23.79
Silver	USD/t.oz	27.5	-0.5	-1.79	-11.29	13.45
Platium	USD/t.oz	922.1	-20.9	-2.22	-9.35	-0.66
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.09		0.01	0.93	0.93	-0.91
USD/CNY	7.11		-0.16	-2.2	-2.47	-0.56

第八部分 本周话题 WEEKLY TOPIC



航运绿色甲醇燃料和配套产业

全球航运业对清洁能源的需求不断增长，这推动了甲醇燃料动力船舶市场的迅速发展，当前以绿色甲醇燃料作为动力的船舶产业正经历着前所未有的发展和市场需求，其技术准备、配套供应到燃料供给等，整个产业链正呈现健康的发展态势。

从新造船订单来看，可使用替代燃料的新造船订单在2024年首次突破1亿载重吨，而同期以LNG为动力的新造船订单达到7600万载重吨，已经超过以LNG为动力的新造船订单，其中甲醇燃料动力装备市场需求大幅增加，众多船东长远选择绿色甲醇燃料。从 2023年新签订单来看，有接近150艘订单为二冲程甲醇燃料发动机，据相关研究报告指出MAN ES主机占据了93%的市场份额，在此之前全球新造船舶二冲程甲醇燃料发动机市场均被MAN ES所垄断。2023年初WinGD获得中远海运4艘16000TEU集装箱船甲醇燃料发动机供应合同，成为WinGD全球首个甲醇燃料发动机订单，从此终结MAN ES的垄断地位。在2023年第四季度，WinGD又获扬子江船业6 艘甲醇双燃料9000TEU集装箱船发动机订单，可满足更多船型的主机需求。

以甲醇燃料为动力的船舶市场来看，经过最近10多年发展，各大主机生成厂商不断努力，得以船用甲醇发动机已经实现了从无到有，从单一技术路线到多种技术路线并行的跨越。甲醇燃料动力船舶技术方案当前基本成熟，二冲程发动机是当前主流市场。

当下，航运界最关心的是能够健康发展的绿色甲醇供应链的匹配网络的形成，从生成到供应，还要有好的性价比，这是航运业能够稳步使用绿色甲醇至关重要的一环。据相关市场报告预测未来五年内全球甲醇市场规模有望达到2000亿美元，其中船用绿色甲醇的需求将成为市场主要增长的驱动力。据相关行业专家分析，为实现2030年的脱碳目标，每年近半数新造船均应采用替代燃料或脱碳技术，彼时大约需要3000多万吨绿色甲醇，考虑到项目开发中各种挑战，到2030年可再生甲醇的产能可能在700至1500百万吨之间，显而易见绿色甲醇的供不应求或将成为航运脱碳进程的最大瓶颈。

中国规划的绿色甲醇项目数量多、 产能大，但距离投产仍有一定时间。欧洲的绿色甲醇产能增长速度快。但目前绿色甲醇的产能现状仍然难以满足快速增长的市场需求，未来仍需进一步完善全球绿色甲醇制备及供应体系，以满足全球甲醇燃料动力船舶运营需求。

早在2023年，马士基交付了全球首艘甲醇燃料动力的集装箱船，欧盟委员会主席冯德莱恩出席了命名仪式，显示了其推进绿色航运的姿态。近期这家丹麦集装箱航运巨头突然又订购了一批采用液化天然气作为燃料的新造船，引起了市场的关注，可见绿色甲醇燃料供应链的发展不会一帆风顺。

The demand for green energy in the global shipping industry is rapidly increasing, driving the swift development of the methanol-fuel ship market. Currently, the industry powered by green methanol is experiencing unprecedented growth and market demand. The entire supply chain, from technology readiness and ancillary services to fuel supply, is showing healthy development trends.

In terms of newbuilding orders, those using alternative fuels are expected to surpass 100 million deadweight tonnes for the first time in 2024, while orders using LNG will reach 76 million deadweight tonnes, exceeding those powered by LNG. The demand for methanol fuel-powered equipment is significantly increasing, with many shipowners opting long-term for green methanol. In 2023, nearly 150 new orders featured two-stroke methanol fuel engines. According to related research reports, MAN ES has a 93% market share in this segment, having previously monopolized the global newbuilding market for two-stroke methanol fuel engines. Earlier in 2023, WinGD secured a contract to supply methanol fuel engines for four 16,000 TEU container ships from COSCO Shipping, marking WinGD's first methanol fuel engine order globally and breaking MAN ES's monopoly. In the fourth quarter of 2023, WinGD received orders for six methanol dual-fuel 9,000 TEU container ship engines from Yangzijiang Shipbuilding, catering to a more diverse range of vessel types.

The methanol-fuel ship market has evolved significantly over the past decade, with major engine manufacturers continuously working to develop marine methanol engines, transitioning from having none to multiple technical pathways. The technical solutions for methanol fuel-powered vessels are now fundamentally mature, with two-stroke engines dominating the market.

Currently, the shipping industry is focused on establishing a robust and sustainable green methanol supply chain that is cost-effective, which is crucial for the steady adoption of green methanol in shipping. Market reports forecast that the global methanol market could reach USD 200 billion within the next five years, with the demand for marine green methanol becoming a primary growth driver. Industry experts suggest that to meet decarbonisation targets by 2030, nearly half of all new ships should adopt alternative fuels or decarbonisation technologies, necessitating approximately 30 million tonnes of green methanol, while the estimated amounts might be between 7 to 15 million tonnes. It is evident that the supply-demand imbalance of green methanol may become a significant bottleneck in the shipping decarbonisation process.

China has numerous green methanol projects with considerable capacity, but they are still some time away from production. In contrast, Europe's green methanol production capacity is increasing rapidly. However, the current capacity of green methanol is still insufficient to meet the rapidly growing market demand, indicating the need for improvements in the global green methanol preparation and supply system to fulfil the operating requirements of methanol-fuelled vessels.

As early as 2023, Maersk delivered the world's first methanol-powered container ship, with European Commission President von der Leyen attending the naming ceremony, emphasising efforts to promote green shipping. Recently, this Danish shipping giant ordered a batch of new vessels powered by liquefied natural gas, drawing market attention and indicating that the development of the green methanol supply chain may not be smooth sailing.