



2024年 第33周市场周报

Contents

第一部分

航运安全 SHIPPING SAFETY

第二部分

航运数据 SHIPPING DATA

第三部分

航运市场 SHIPPING MARKET

第四部分

运力分布 SUPPLY DISTRIBUTION

第五部分

远期运价协议 FFA

第六部分

燃油价格 BUNKER PRICE

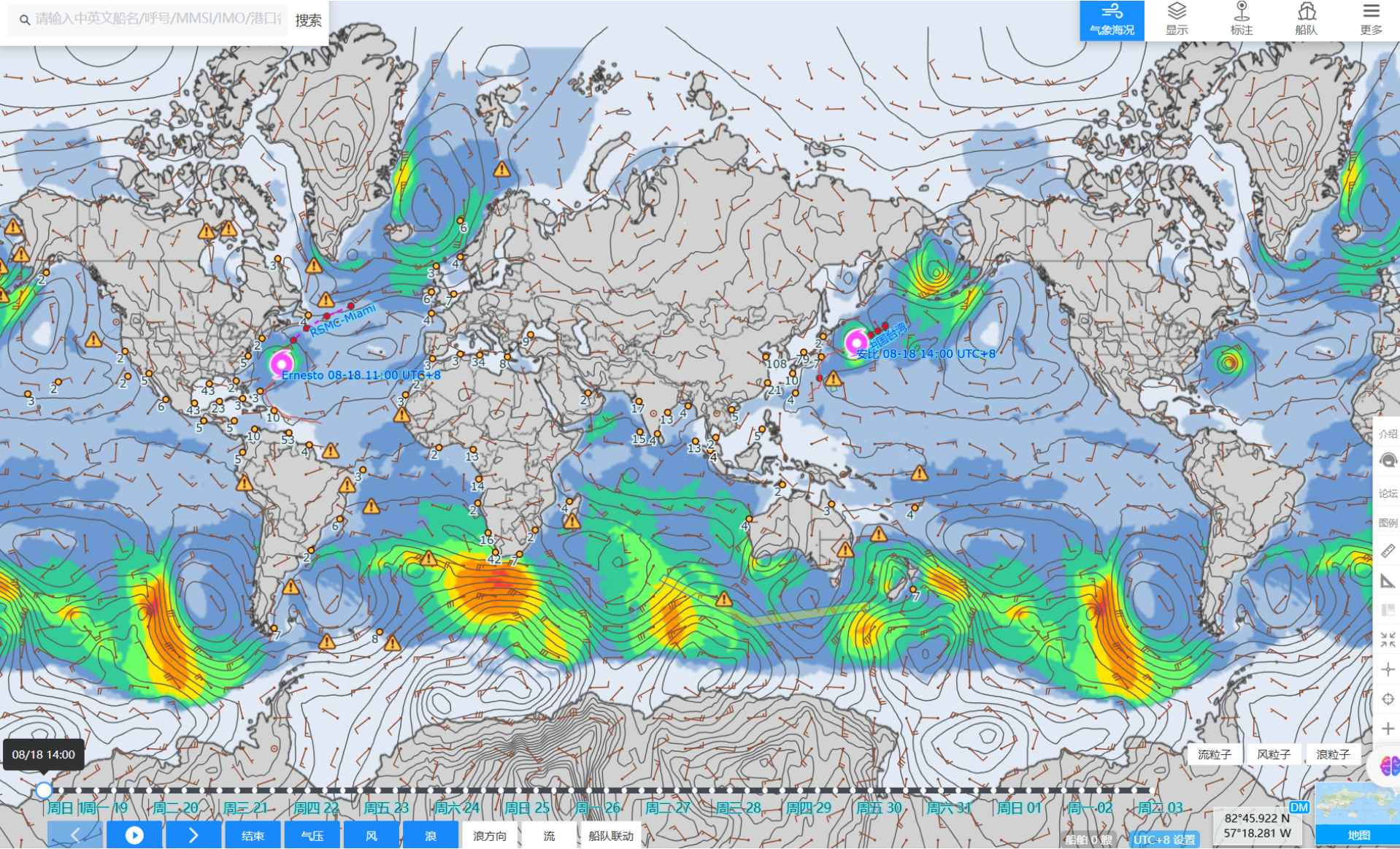
第七部分

最新商品价格 LATEST COMMODITIES PRICE

第八部分

本周话题 WEEKLY TOPIC

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822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 822 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4-5级，相关海域1米轻浪；黄海风力维持4-5级，相关海域中浪；东海风力未来将经历6-7级，相关海域大浪；台湾海峡风力将经历6-7级，台湾海峡大浪；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 moderate breeze with moderate seas. Yellow Sea stays moderate with moderate wave. And China East Sea shall experience near gale with rough wave. The wind in the Taiwan Strait will experience near gale and sea there experience rough. 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

最近一周没有海盗事件报道。There is no piracy report for the latest week.

海上事件 Marine Incidents

8月6日消息，希腊反毒品组织在一艘集装箱船上的一批香蕉中查获了30包藏匿的可卡因，共计34公斤。News on August 6th, the Greek anti-drug team discovered 30 hidden packages of cocaine weighing a total of 34 kilograms in a batch of bananas on a container ship.

其它 Others

没有 Nil

备注 Remark

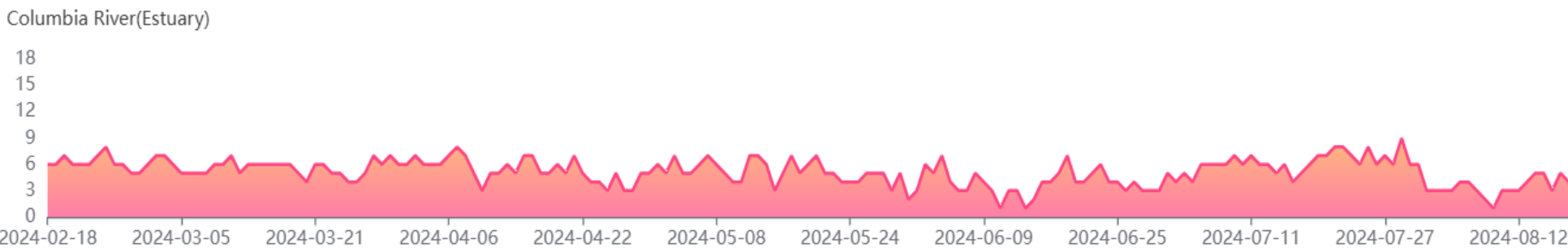
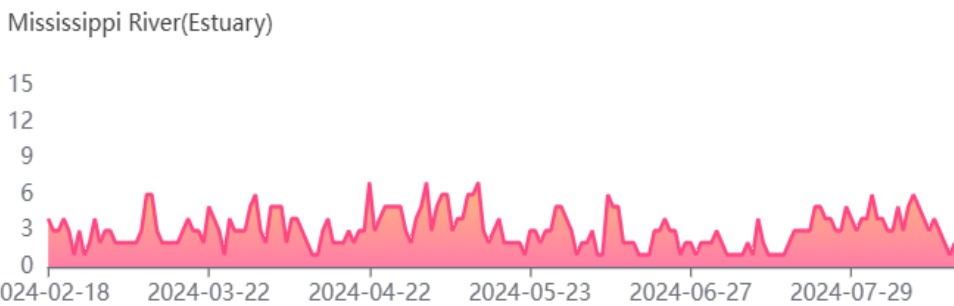
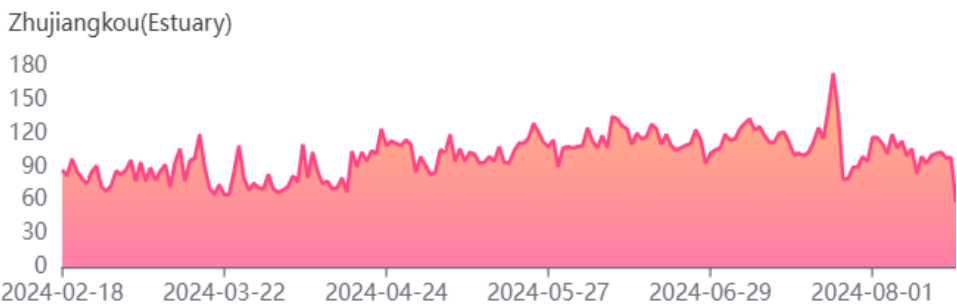
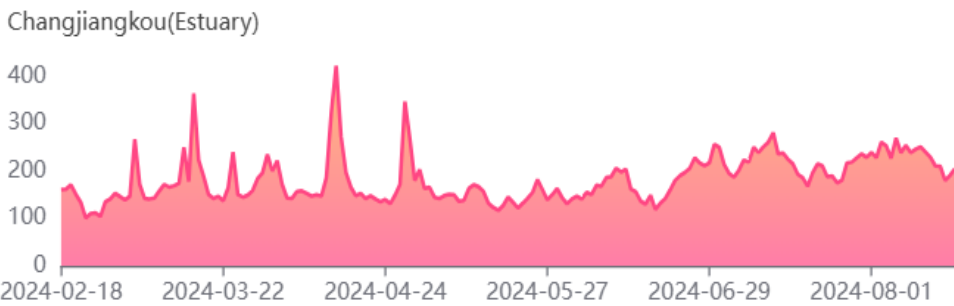
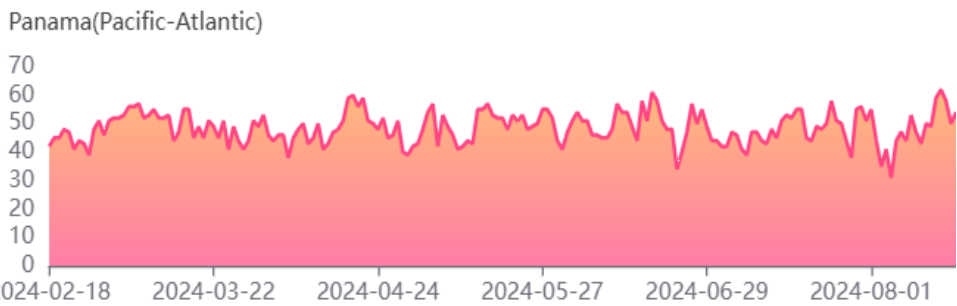
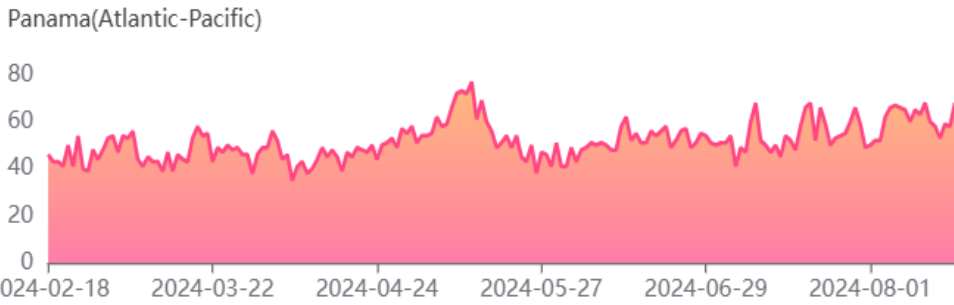
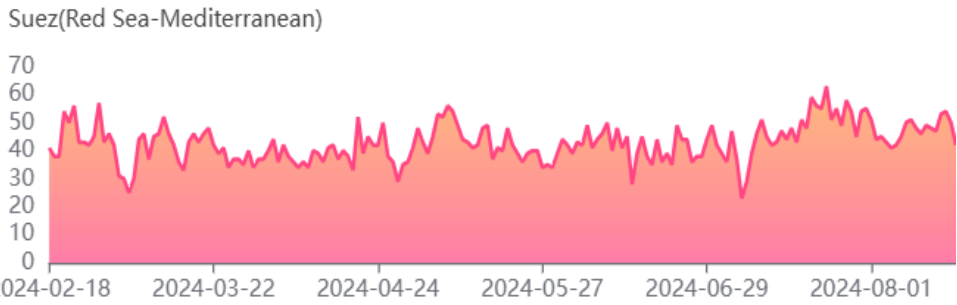
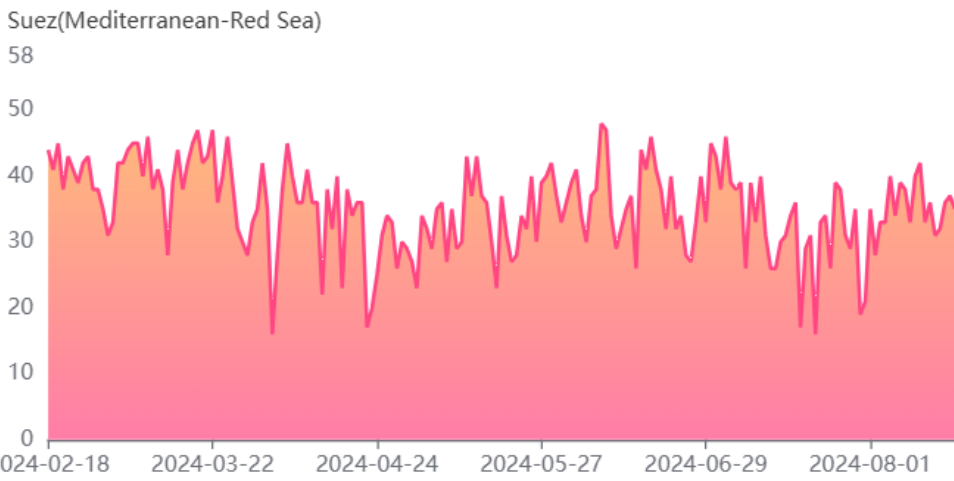
本报告数据截止时间为2024年8月18日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Aug 18th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	42	1444	23	187
Miss.Riv.	2	110	-10	56
CJK	205	6462	-262	96
Pa.Atlan.	68	1715	-27	177
Colum.Riv.	4	138	9	-14
Suez.Med.	35	956	-17	-4
Pa.Pac.	54	1416	75	61
ZJK	58	3051	-79	-242

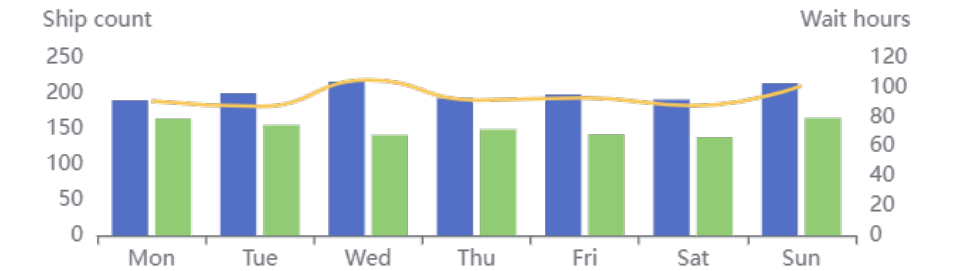
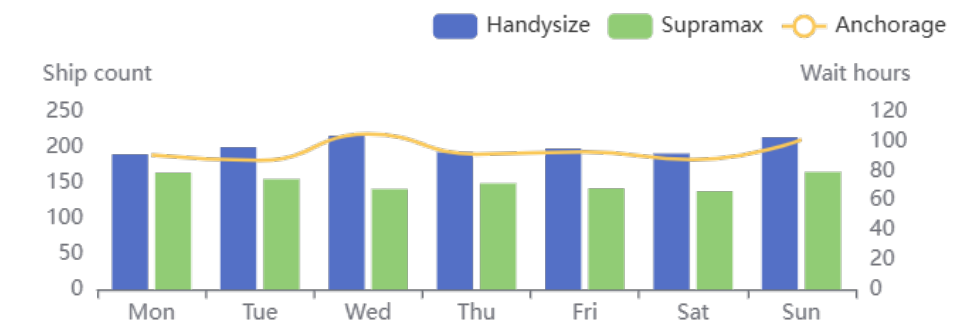


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

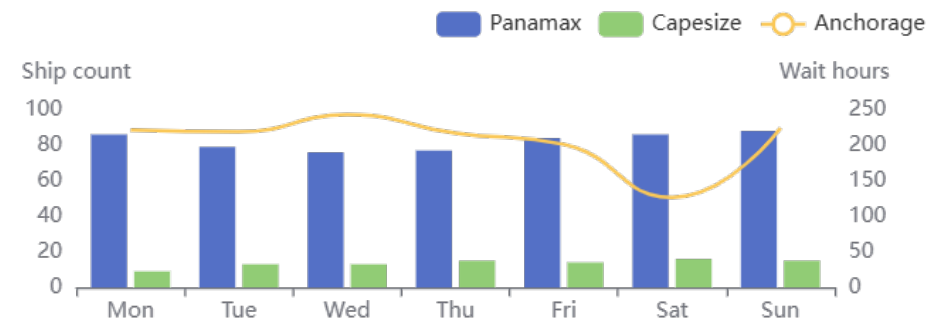
Type	M	T	W	Th	F	Sat	Sun
HDY	190	200	216	193	198	191	214
SMX	164	155	141	149	142	138	165
WT.h.	90.7	87.1	104.9	91.3	92.9	87.6	101



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

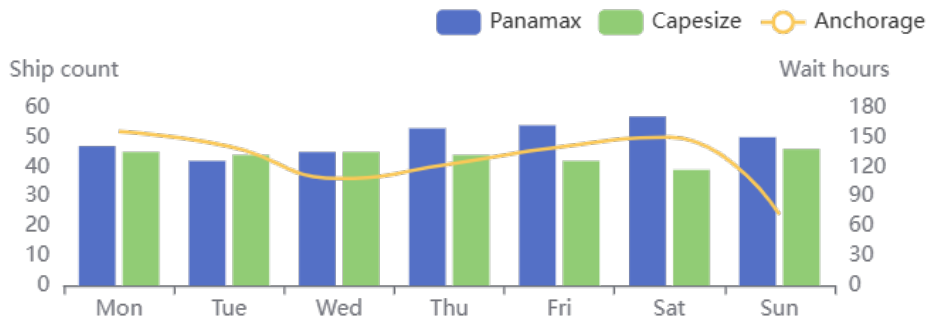
Type	M	T	W	Th	F	Sat	Sun
Pan.	86	79	76	77	84	86	88
Cap	9	13	13	15	14	16	15
WT.h.	221.7	218.8	242.8	216.9	201.2	126.4	224



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

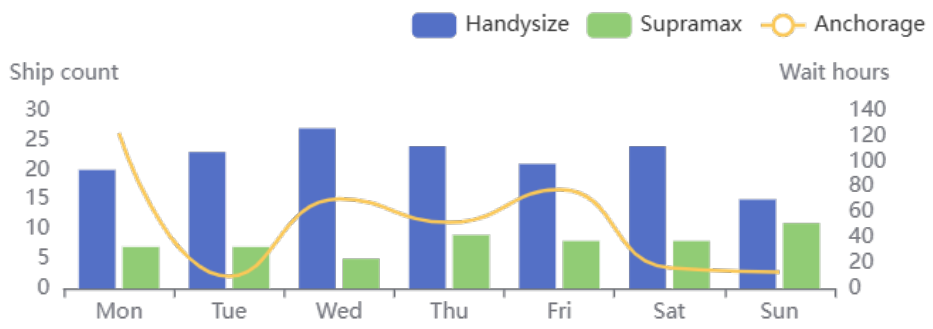
Type	M	T	W	Th	F	Sat	Sun
Pan.	47	42	45	53	54	57	50
Cap	45	44	45	44	42	39	46
WT.h.	155.9	140.9	108.2	122.9	140.1	150	72



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

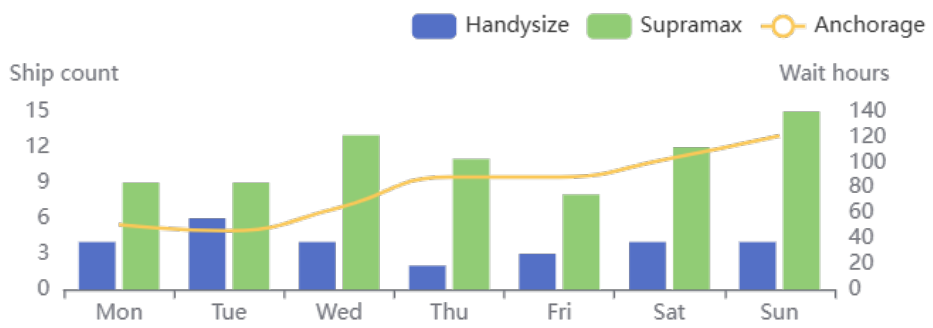
Type	M	T	W	Th	F	Sat	Sun
HDY	20	23	27	24	21	24	15
SMX	7	7	5	9	8	8	11
WT.h.	122.1	9.45	70.5	52	77.9	16.2	13



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

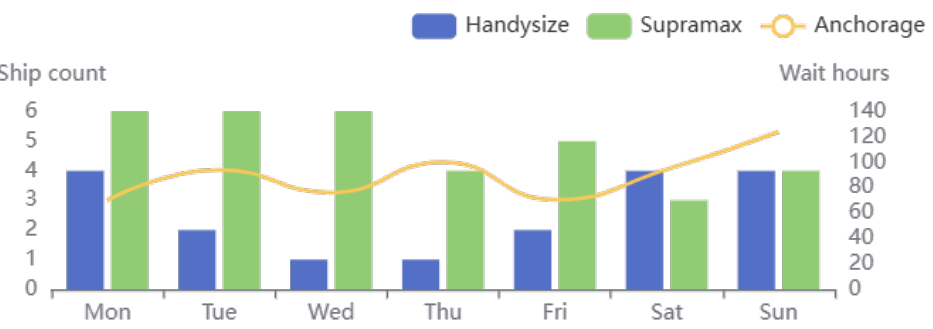
Type	M	T	W	Th	F	Sat	Sun
HDY	4	6	4	2	3	4	4
SMX	9	9	13	11	8	12	15
WT.h.	50.9	46.3	64.5	88.5	88.6	103.15	121



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

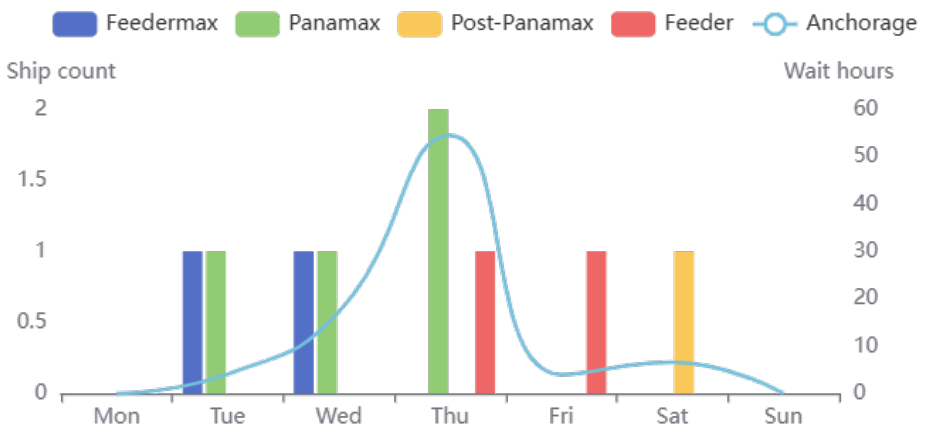
Type	M	T	W	Th	F	Sat	Sun
HDY	4	2	1	1	2	4	4
SMX	6	6	6	4	5	3	4
WT.h.	70.2	94.2	76.3	100.3	70.5	94.5	124



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

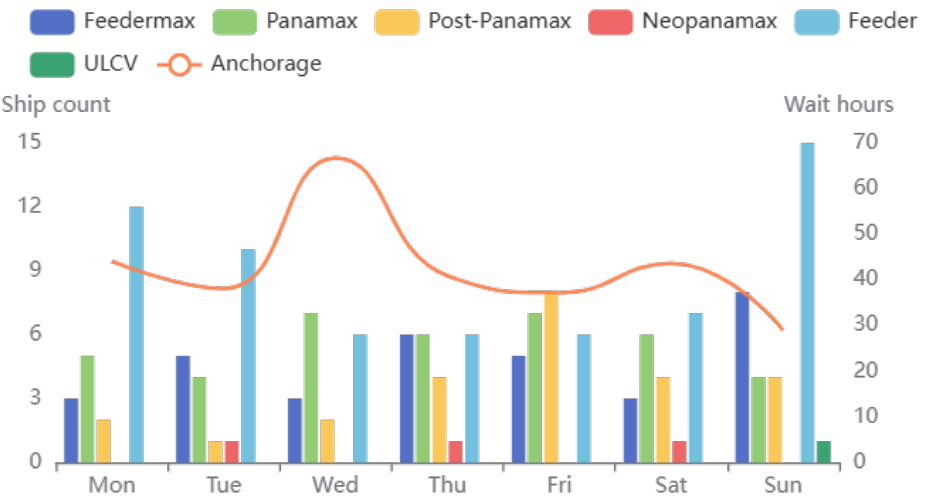
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	1	1	0	0	0	0
Pan.	0	1	1	2	0	0	0
PPx	0	0	0	0	0	1	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	1	1	0	0
WT.h.	0.0	4.1	17.25	54.5	4	6.6	0.0
Ulcw	0	0	0	0	0	0	0



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

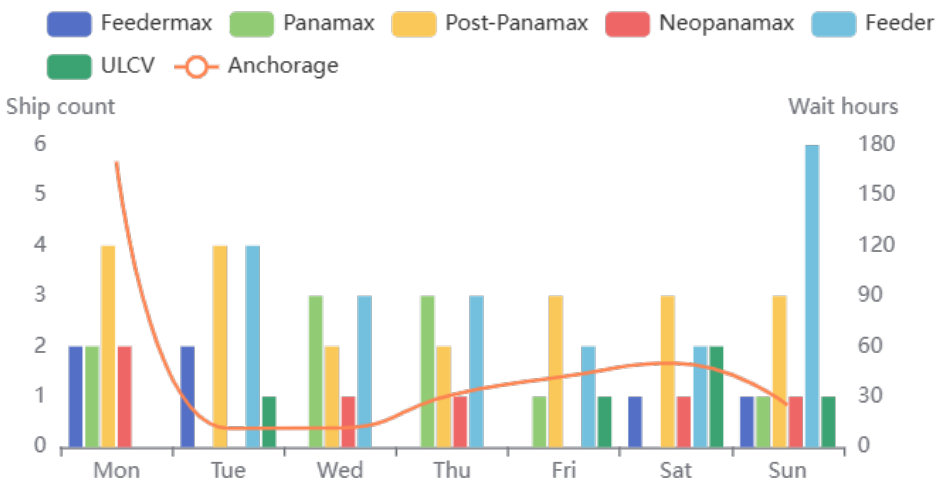
Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	5	3	6	5	3	8
Pan.	5	4	7	6	7	6	4
PPx	2	1	2	4	8	4	4
NPx	0	1	0	1	0	1	0
Fd	12	10	6	6	6	7	15
Ulcw	0	0	0	0	0	0	1
WT.h.	44.1	38.1	66.7	40.9	37.2	43.6	29



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

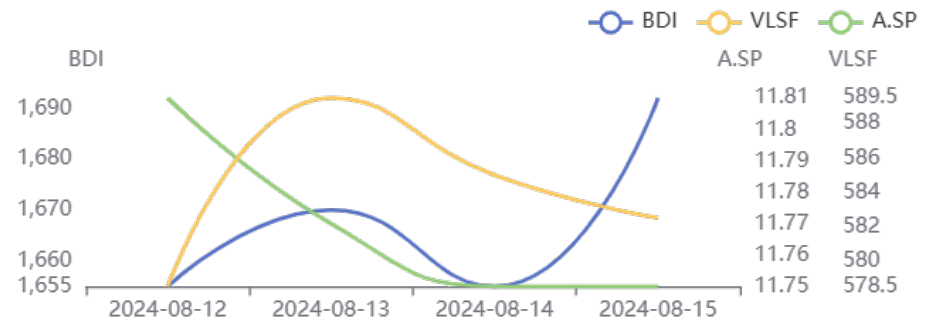
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	2	0	0	0	1	1
Pan.	2	0	3	3	1	0	1
PPx	4	4	2	2	3	3	3
NPx	2	0	1	1	0	1	1
Fd	0	4	3	3	2	2	6
Ulcw	0	1	0	0	1	2	1
WT.h.	170.2	11.3	11.5	31.2	42.1	50	25



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

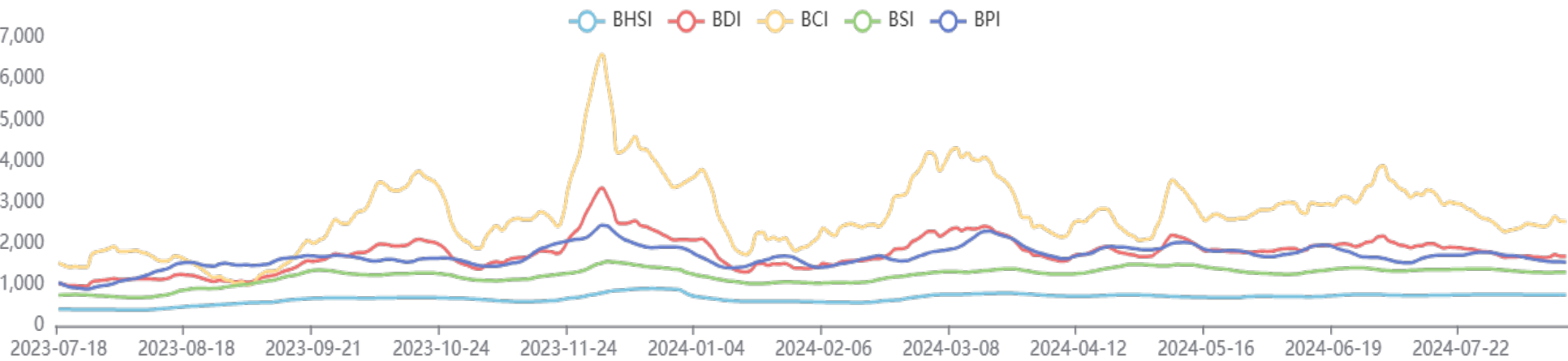
Type	M	T	W	Th	F	Sat	Sun
BDI	1584	1563	2413	1554	1552		
VLSF	578.50	589.50	585.00	582.50			
A.SP	11.81	11.77	11.75	11.75	11.81	11.7	



第三部分 航运市场 SHIPPING MARKET

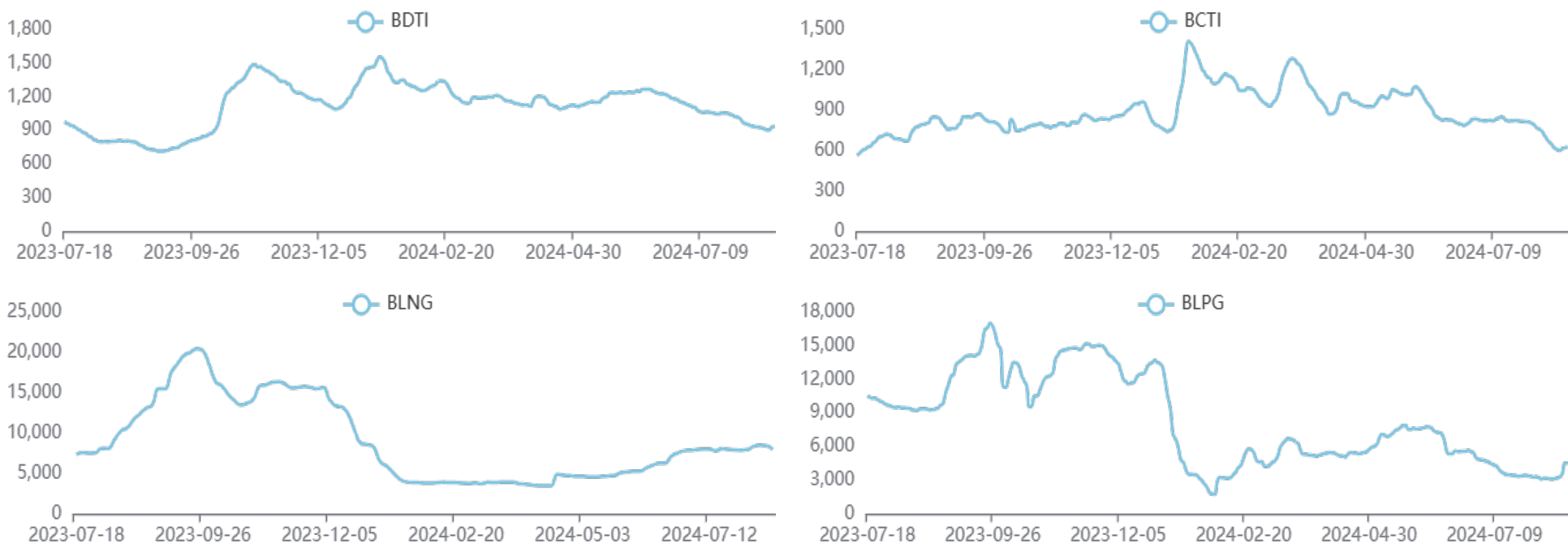
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1691	21.0	1.26	-11.09	37.15
BCI	2537	100.0	4.1	-14.67	49.15
BPI	1552	-47.0	-2.94	-9.45	4.44
BSI	1304	3.0	0.23	-5.09	60.59
BHSI	754	-1.0	-0.13	0.27	69.82

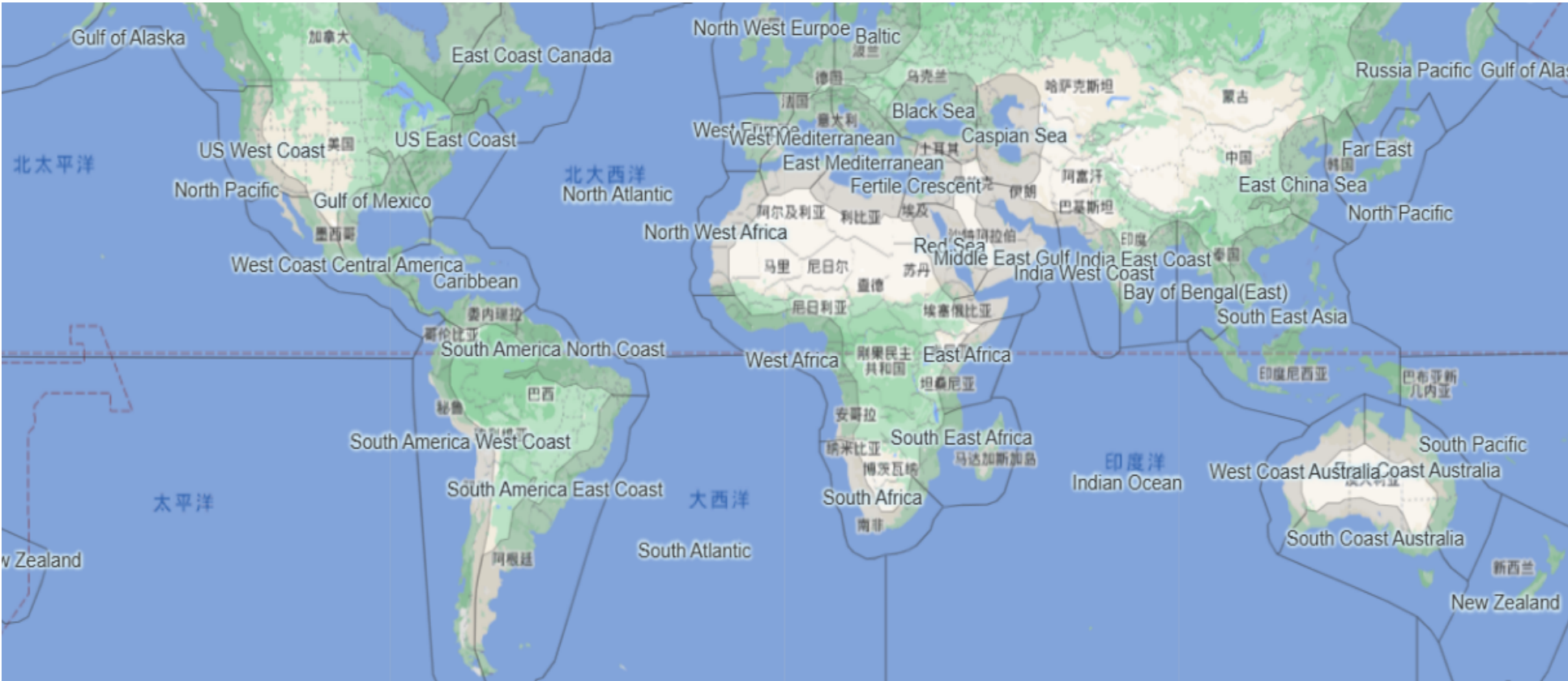


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	936	14.0	1.52	-11.36	16.13
BCTI	625	3.0	0.48	-23.97	-12.34
BLNG	7986	-521.0	-6.12	-1.0	-31.17
BLPG	4489	1359.0	43.42	31.26	-52.0



第四部分 运力分布 SUPPLY DISTRIBUTION

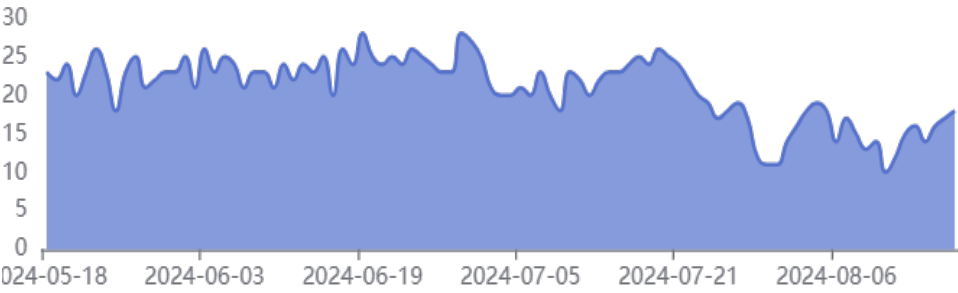


好望角型散货船 Capesize

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	12	15	16	14	16	17	18



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.

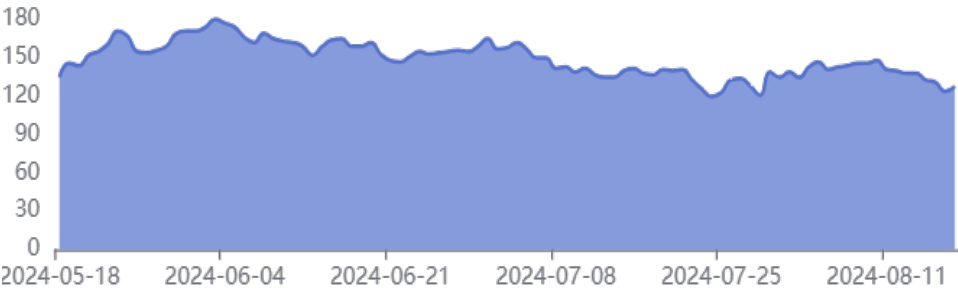
Type	M	T	W	Th	F	Sat	Sun
Cape	35	37	37	37	35	38	35

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.

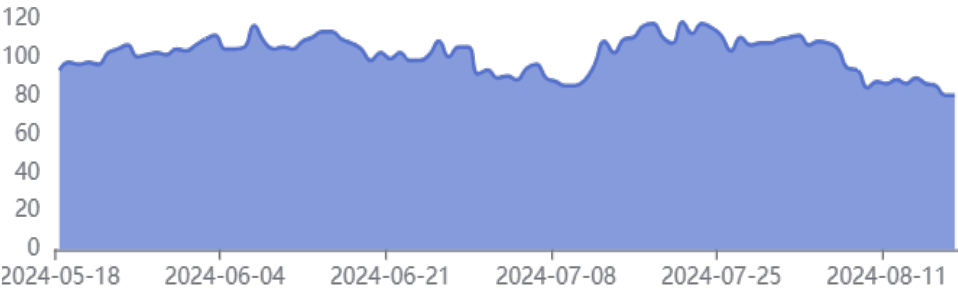
Type	M	T	W	Th	F	Sat	Sun
Pan.	139	137	137	132	130	123	127



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.

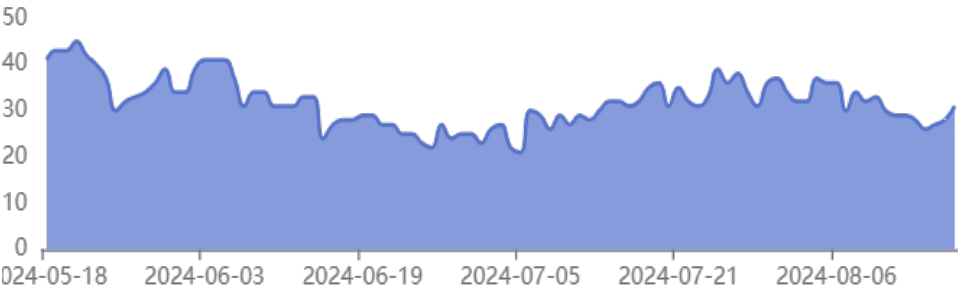
Type	M	T	W	Th	F	Sat	Sun
Cape	88	86	89	86	85	80	80



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.

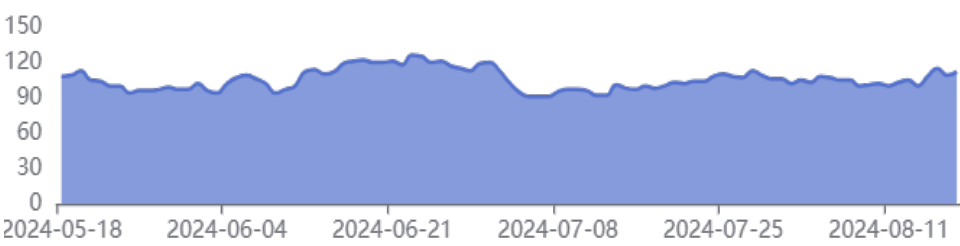
Type	M	T	W	Th	F	Sat	Sun
Pan.	20	21	26	20	20	20	18



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.	103	105	100	108	115	109	112

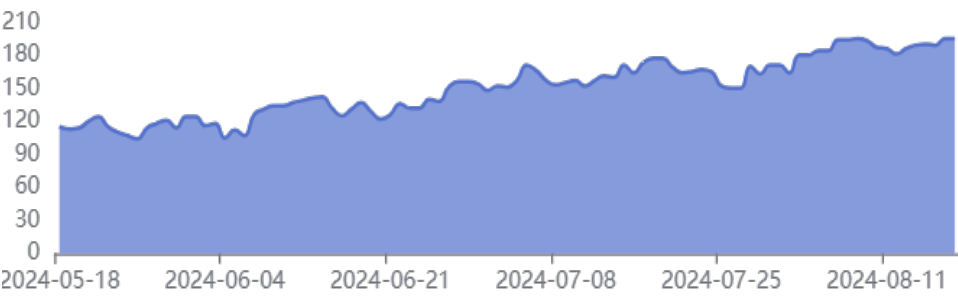


超大灵便型散货 SUPRAMAX

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.

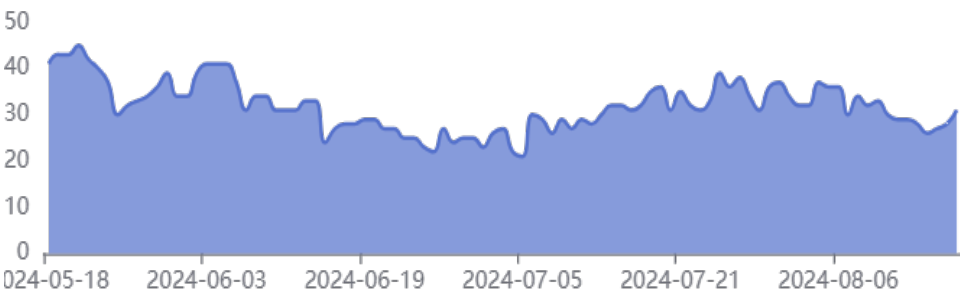
Type	M	T	W	Th	F	Sat	Sun
SMX	181	186	189	190	189	195	195



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.

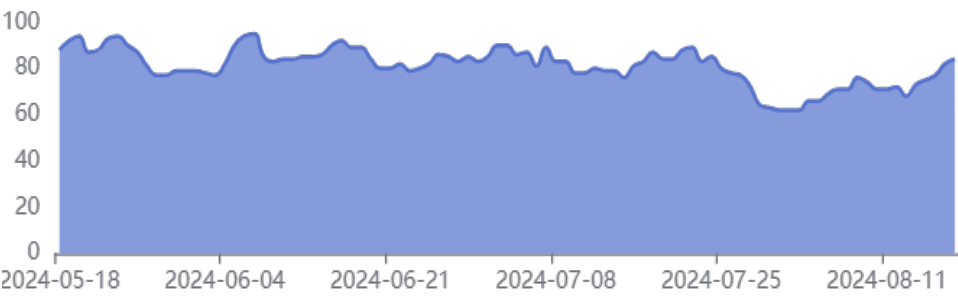
Type	M	T	W	Th	F	Sat	Sun
SMX	29	29	28	26	27	28	31



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.

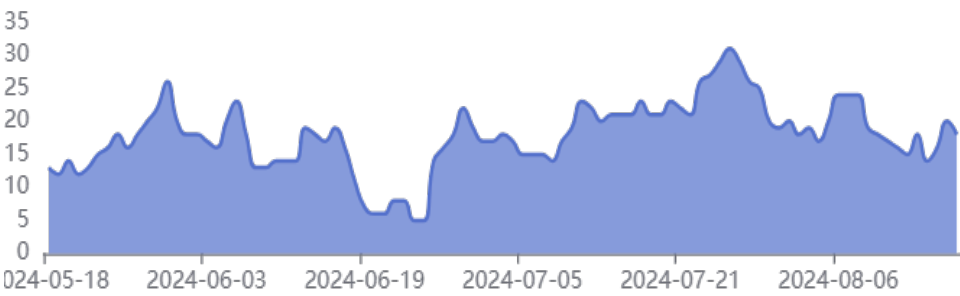
Type	M	T	W	Th	F	Sat	Sun
SMX	16	15	18	14	16	20	18



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.

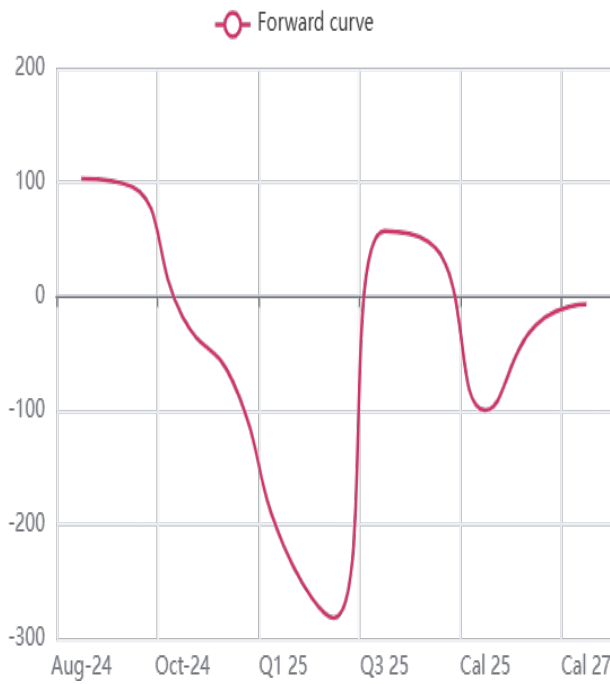
Type	M	T	W	Th	F	Sat	Sun
SMX	72	68	73	75	77	82	84



第五部分 远期运价协议 FFA

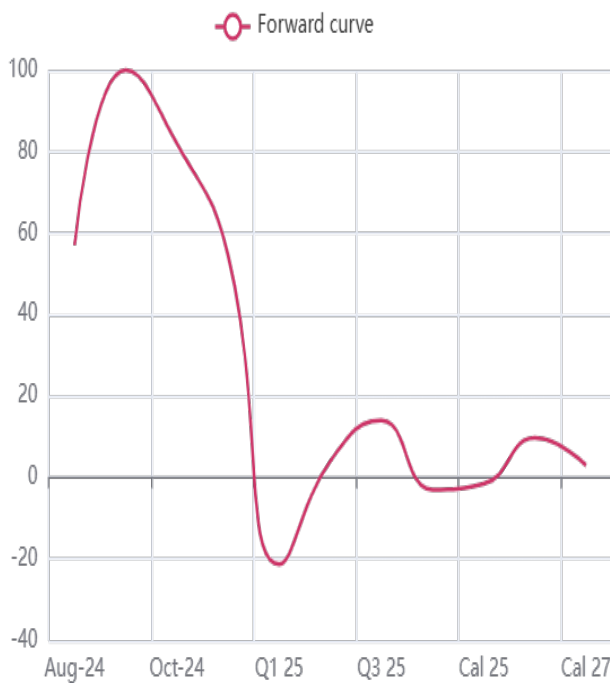
好望角型散货船Capesize

5TC	\$/day	WoW	
Aug-24	21,171.00	103.0	0.5 %
Sep-24	24,289.00	96.0	0.4 %
Oct-24	27,107.00	-18.0	-0.1 %
Q4 24	26,212.00	-75.0	-0.3 %
Q1 25	15,982.00	-218.0	-1.3 %
Q2 25	20,518.00	-282.0	-1.4 %
Q3 25	24,536.00	57.0	0.2 %
Q4 25	24,557.00	43.0	0.2 %
Cal 25	21,398.25	-100.0	-0.5 %
Cal 26	20,995.75	-25.25	-0.1 %
Cal 27	20,089.00	-7.0	0.0 %



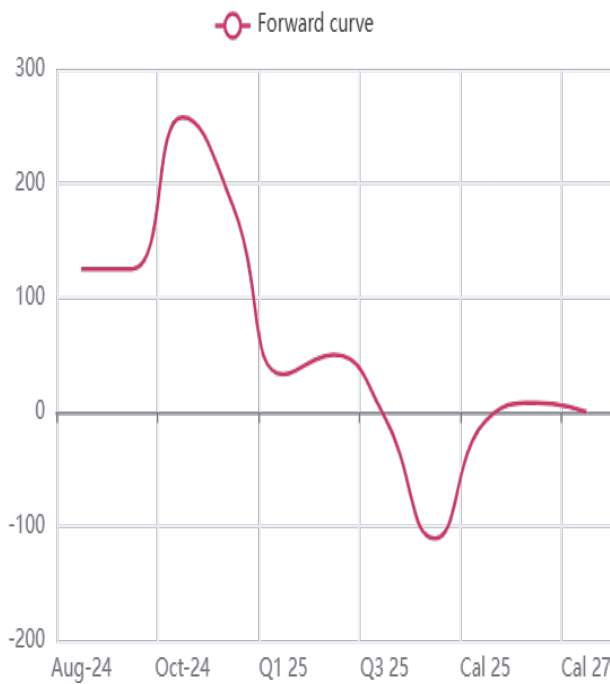
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Aug-24	13,268.00	57.0	0.4 %
Sep-24	14,054.00	100.0	0.7 %
Oct-24	15,311.00	82.0	0.5 %
Q4 24	15,118.00	54.67	0.4 %
Q1 25	12,468.00	-21.33	-0.2 %
Q2 25	13,879.00	4.0	0.0 %
Q3 25	13,721.00	14.0	0.1 %
Q4 25	13,386.00	-3.0	0.0 %
Cal 25	13,363.50	-1.58	0.0 %
Cal 26	12,613.75	9.75	0.1 %
Cal 27	12,421.00	3.0	0.0 %



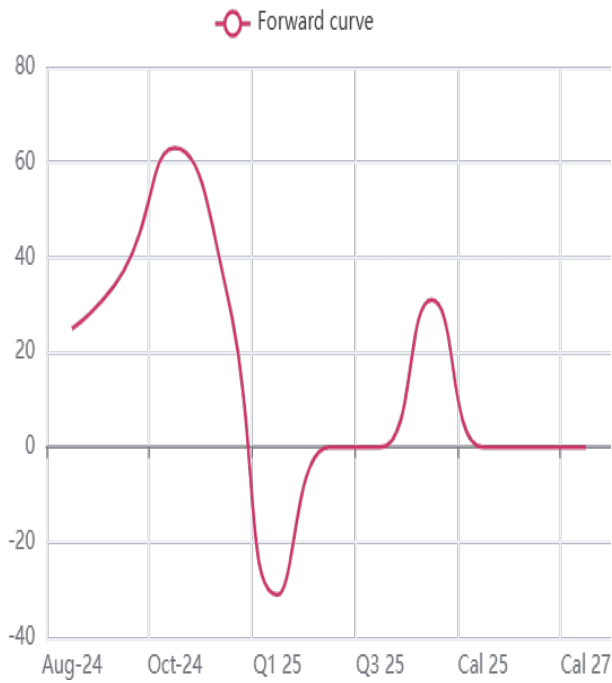
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Aug-24	14,588.00	125.0	0.9 %
Sep-24	15,279.00	125.0	0.8 %
Oct-24	15,858.00	258.0	1.7 %
Q4 24	15,302.67	180.33	1.2 %
Q1 25	12,250.00	32.67	0.3 %
Q2 25	13,658.00	50.0	0.4 %
Q3 25	13,646.00	-4.0	0.0 %
Q4 25	13,746.00	-111.0	-0.8 %
13,325.00	Cal 25	-8.08	-0.1 %
Cal 26	12,596.00	8.0	0.1 %
Cal 27	12,283.00	0.0	0.0 %



灵便型散货船Handysize

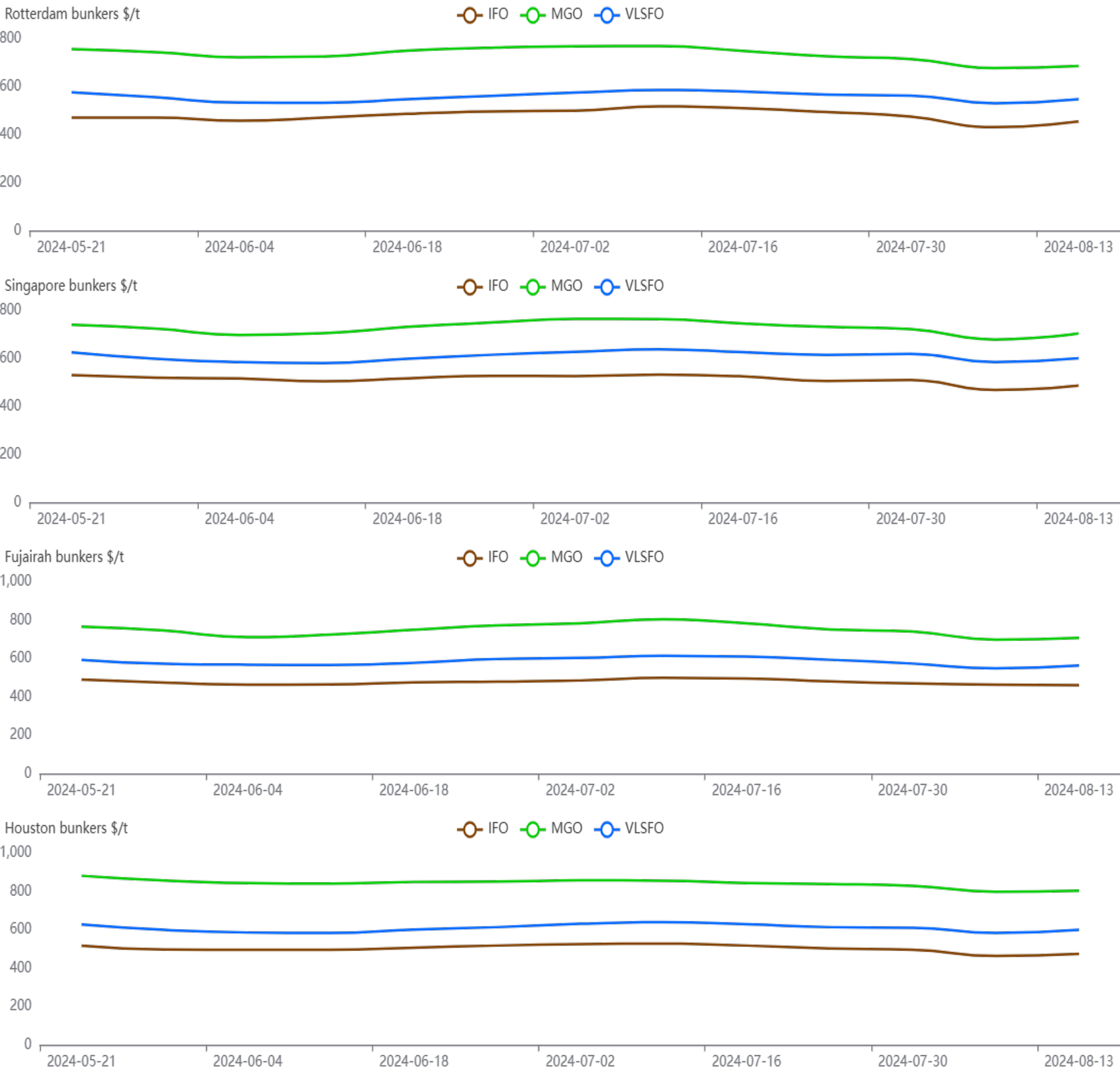
7TC	\$/day	WoW	
Aug-24	13,838.00	25.0	0.2 %
Sep-24	14,375.00	37.0	0.3 %
Oct-24	14,663.00	63.0	0.4 %
Q4 24	14,319.00	33.33	0.2 %
Q1 25	11,425.00	-31.0	-0.3 %
Q2 25	12,850.00	0.0	0.0 %
Q3 25	12,613.00	0.0	0.0
Q4 25	13,112.00	31.0	0.2 %
Cal 25	12,500.00	0.0	0.0 %
Cal 26	11,813.00	0.0	0.0 %
Cal 27	11,550.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	605.5	507.5	743.0	98.0	-0.5	-0.51	19.51
Singapore	602.0	487.5	705.5	114.5	-2.0	-1.72	13.37
Rotterdam	548.5	455.5	686.5	93.0	-7.0	-7.0	33.81
Fujairah	564.5	461.0	708.5	103.5	17.5	20.35	-9.21
Houston	600.5	475.0	804.5	125.5	5.5	4.58	12.56

(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	195.0		-5.0	-2.5	-2.99	-18.26
Maize	186.0		-16.0	-7.92	-6.06	-16.45
Soybeans	206.0		-5.0	-2.37	-5.07	-15.07
Rice	242.0		-5.0	-2.02	-1.63	-12.75
Barley	200.0		-14.0	-6.54	-5.21	-12.27
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	72.04	0.0	0.0	-12.42	-12.05
Brent	USD/Bbl	75.4	0.0	0.0	-11.31	-11.81
Natural Gas	USD/MMBtu	1.91	0.0	0.0	-15.86	-26.54
Gasoline	USD/Gal	2.27	0.0	0.0	-9.56	-18.64
Heating Oil	USD/Gal	2.28	0.0	0.0	-9.16	-24.75
Ethanol	USD/Gal	1.8	0.0	0.0	-6.25	-17.05
Naphtha	USD/T	644.69	0.0	0.0	-7.42	0.87
Propane	USD/Gal	0.73	0.0	0.0	-9.88	-1.35
Uranium	USD/Lbs	82.6	0.0	0.0	-4.12	46.84
Methanol	CNY/T	2456.0	0.0	0.0	-2.66	6.18
TTF Gas	EUR/MWh	39.82	0.0	0.0	25.85	32.25
UK Gas	GBP/thm	89.84	0.0	0.0	23.34	18.3
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.0	0.0	0.0	-12.47	4.71
Coal	USD/T	144.1	0.0	0.0	7.66	5.96
Steel	CNY/T	3040.0	0.0	0.0	-7.85	-16.62
Iron Ore	USD/T	104.0	0.0	0.0	-5.09	-2.35
Aluminum	USD/T	2242.5	0.0	0.0	-9.27	0.58
Lithium	CNY/T	79500.0	0.0	0.0	-12.15	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2419.8	0.0	0.0	0.51	25.0
Silver	USD/t.oz	27.5	0.0	0.0	-10.42	17.22
Platium	USD/t.oz	922.1	0.0	0.0	-6.93	0.78
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.09		0.0	0.0	0.0	-0.91
USD/CNY	7.11		0.0	0.0	-2.34	-1.25

第八部分 本周话题 WEEKLY TOPIC



船舶节能减排

2024年8月2日，伦敦报道，加拿大航运初创公司Veer Group将前往德国与Fosen造船厂签署造船意向书，建造两艘风能驱动和氢能辅助的150箱位集装箱船，号称温室气体零排放。随着航运行业寻求减少温室气体排放，节能技术的应用在船舶上不断增加。数据显示，以全球船舶总吨位为统计口径，超过三分之一的船舶已采用至少一种重要的节能技术，十年前这一比例仅为10%。

船舶节能技术与替代燃料和越来越高效的发动机共同发挥着日益重要的作用，直接降低燃料消耗和排放。不同技术的节油效果各异，市场上典型的燃油节省一般在2%-10%之间（某些情况下可达30%），实际节能水平取决于节能技术和船舶类型的匹配，还有操作方面的因数。

目前有记录的超过8700艘船舶已安装至少一种重要的节能技术，这些船舶中超过40%比例的船舶安装了多种节能技术。绝大多数在螺旋桨或螺旋桨相关的设备采用了节能技术。接近23%的船舶在船艏部做了减少风浪阻力的优化。超过10%的船舶在船体和涂层方面采用优化方案。超过60艘船舶采用风助推进技术。太阳能电池板也用到了船上，等等。

按船舶类型划分，集装箱船的节能技术应用率最高，超过48%；其次是油轮，超过38%；散货船则超过35%。越大的船舶，节能技术潜力越大。

绝大多数船舶是在新造阶段才能节能技术的。与此同时，超过2000艘现有船舶在特检时进行了节能

技术的改装或加装，改装计划主要集中在10到20年的非生态船舶上，其中集装箱船时改装的主力。

现有船舶节能技术的采用持续增加，这对于船东来说比投资新船的成本更划算，同时为设备供应商，设计院和船厂带来源源不断的商机。

On 2nd August 2024, reports from London indicate that Canadian shipping startup Veer Group will travel to Germany to sign a shipbuilding letter of intent with Fosen Shipyard. They plan to construct two container ships with a capacity of 150 TEUs, powered by wind energy and supplemented by hydrogen, claiming to have zero greenhouse gas emissions. As the shipping industry seeks to reduce its greenhouse gas emissions, the adoption of energy-saving technologies in vessels has been steadily increasing. Data shows that, based on the global total tonnage of ships, over one-third have implemented at least one significant energy-saving technology, compared to just 10% a decade ago.

Energy-saving technologies in shipping, combined with alternative fuels and increasingly efficient engines, play an increasingly crucial role in directly lowering fuel consumption and emissions. The fuel savings achieved through different technologies vary, with typical reductions generally ranging from 2% to 10% on the market (and potentially reaching up to 30% in some cases). The actual level of energy savings depends on the compatibility of the energy-saving technology with the type of vessel and operational factors.

Currently, more than 8,700 recorded vessels have installed at least one important energy-saving technology, with over 40% of these ships employing multiple energy-saving technologies. The vast majority have adopted energy-saving solutions with propellers or related equipment. Nearly 23% of vessels have optimised their bow design to reduce wind and wave resistance. Over 10% have implemented optimisation solutions for hulls and coatings. More than 60 ships have adopted wind-assisted propulsion technology, and solar panels are also being utilised on vessels, among other innovations.

In terms of ship type, container vessels have the highest adoption rate of energy-saving technologies, exceeding 48%; followed by tankers, at more than 38%; and bulk carriers, which exceed 35%. Larger vessels tend to have greater potential for energy-saving technologies.

The majority of ships can implement energy-saving technologies during the new building phase. At the same time, over 2,000 existing vessels have been retrofitted or upgraded with energy-saving technologies during surveys, with modifications primarily focusing on 10 to 20-year-old non-eco-friendly ships, especially among container vessels.

The continued adoption of energy-saving technologies in existing vessels proves to be more cost-effective for shipowners compared to investing in new ships, while also providing ongoing business opportunities for equipment suppliers, design firms, and shipyards.