



2024年 第36周市场周报

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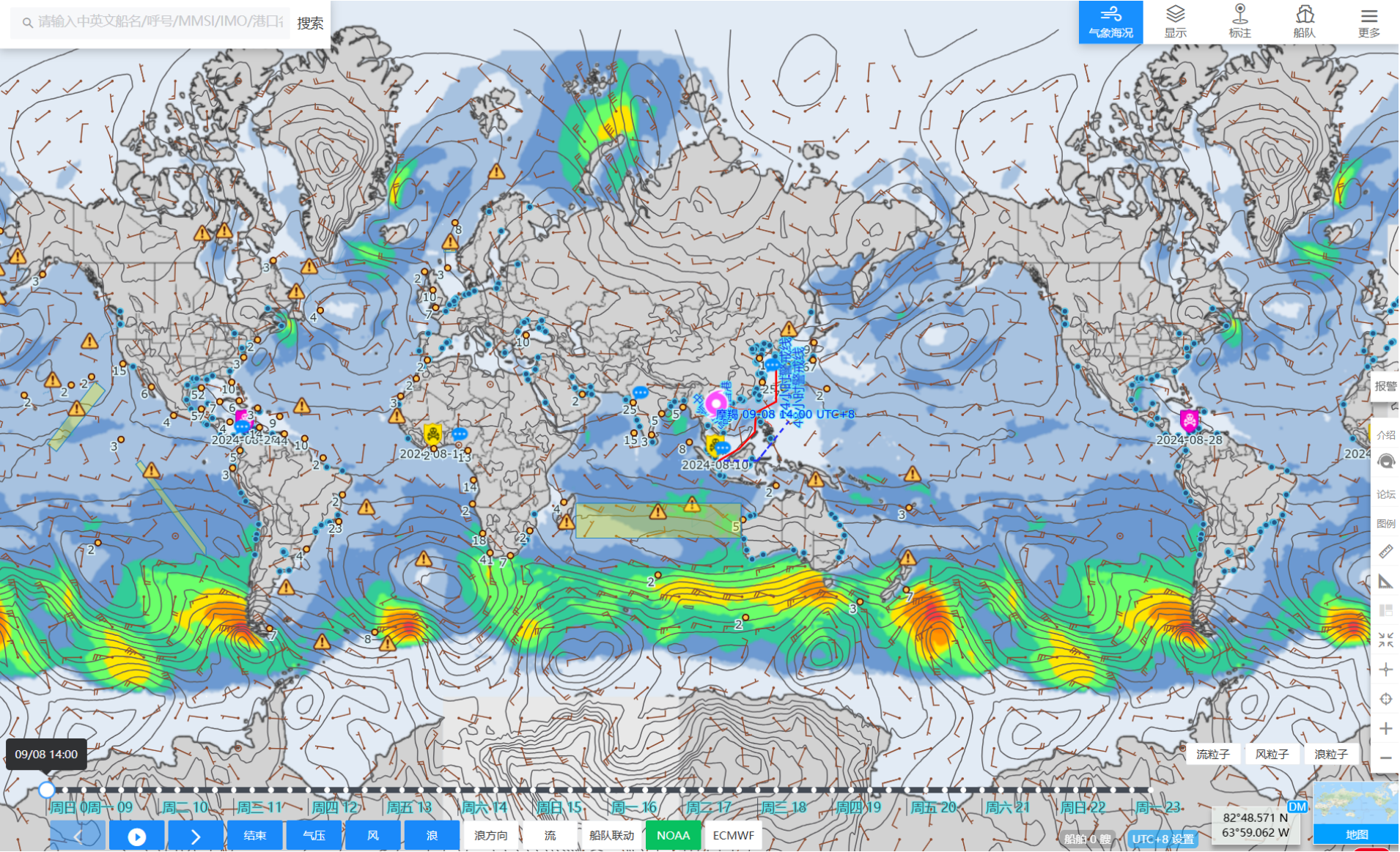
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最新商品价格 LATEST COMMODITIES PRICE

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837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 837 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5-6级，相关海域2米中浪；黄海风力维持4-5级，相关海域中浪；东海风力未来5-6级，相关海域中浪；台湾海峡风力将经历5-6级，台湾海峡中浪；南海大部海域风力5-6级，轻浪。目前西北太平洋热带低压活动频繁。The coming week the wind in Bohai Sea stays fresh and strong breeze with moderate seas. Yellow Sea stays moderate with moderate wave. And China East Sea shall experience strong breeze with moderate wave. The wind in the Taiwan Strait becomes strong and sea there experience moderate. In most of the South China Sea the wind is strong with moderate sea. The tropic pressure activities is frequent recently.

海盗事件 Piracy

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

海上事件 Marine Incidents

据《新印度快报》报道，9月2日周一晚上，三名印度海岸警卫队人员乘坐的直升机在试图从油轮上空运一名海员时坠毁，确认已经死亡。该船是一艘46000载重吨的MR船 Hari Leela (2000年建造)在波尔班达尔海岸附近。New Delhi: Three Indian Coast Guard personnel were confirmed dead on Monday night after their helicopter crashed while trying to airlift a sailor from a tanker, the New Indian Express reported. The vessel is a 46,000 DWT MR Vessel Hari Leela (built in 2000) off the coast of Porbandar.

其它 Others

没有 Nil

备注 Remark

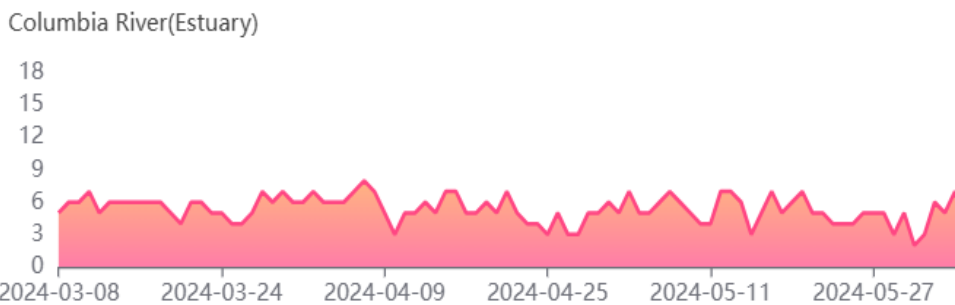
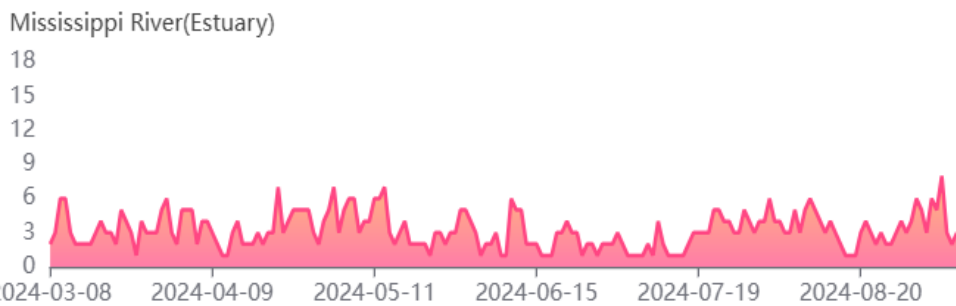
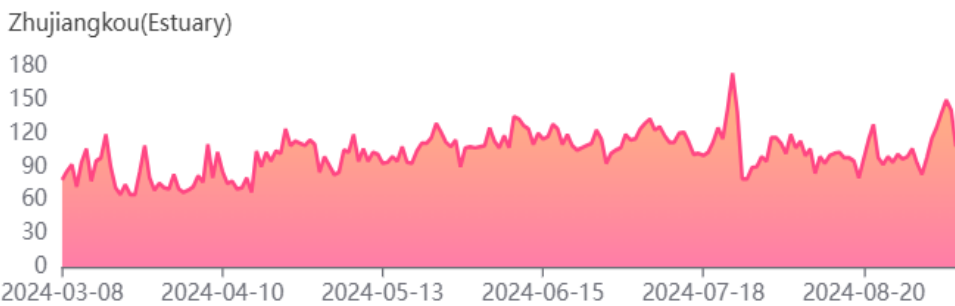
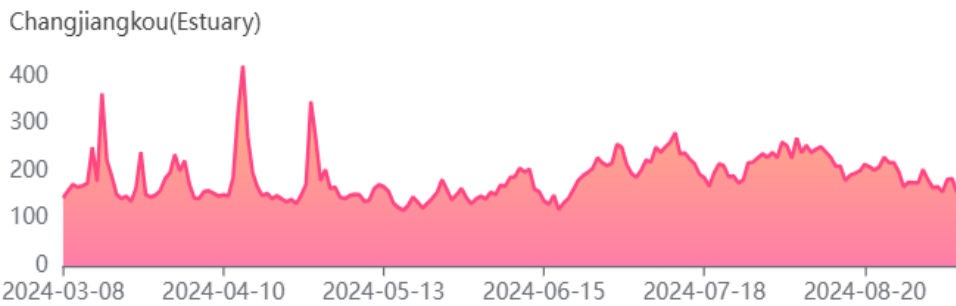
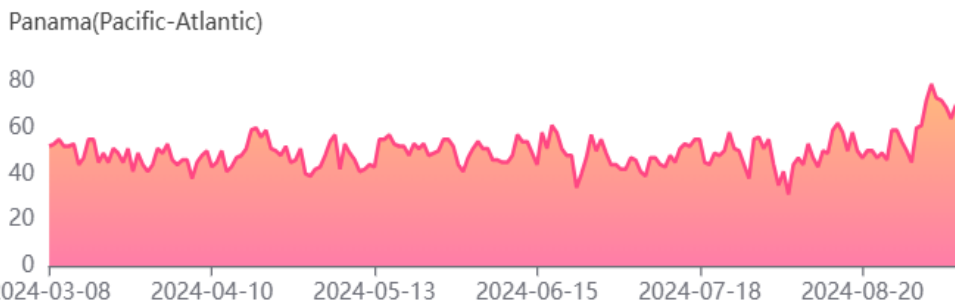
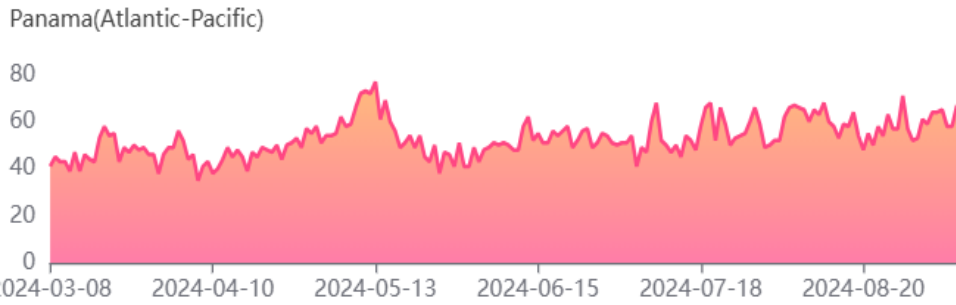
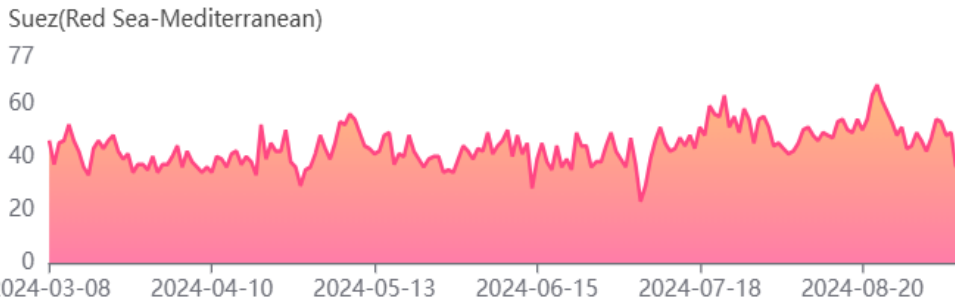
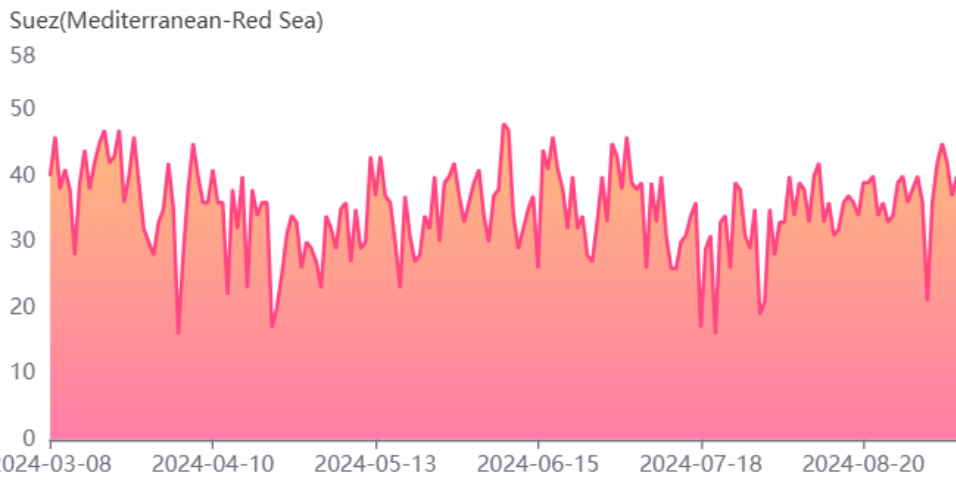
本报告数据截止时间为2024年9月8日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Sep 8th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	36	1465	-16	24
Miss.Riv.	3	98	6	-6
CJK	155	5692	-137	-725
Pa.Atlan.	67	1708	25	26
Colum.Riv.	5	112	23	-37
Suez.Med.	40	1064	3	140
Pa.Pac.	70	1655	126	266
ZJK	108	3044	186	-106

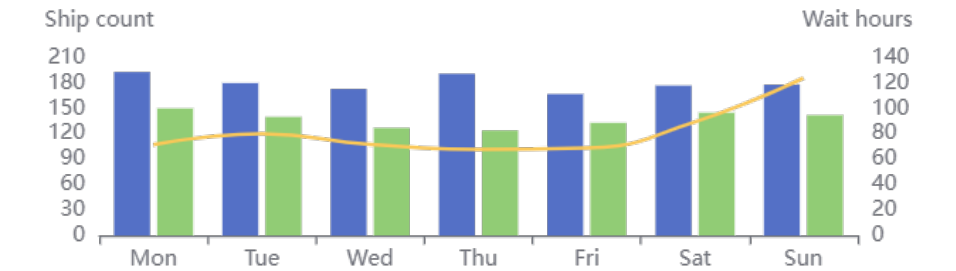
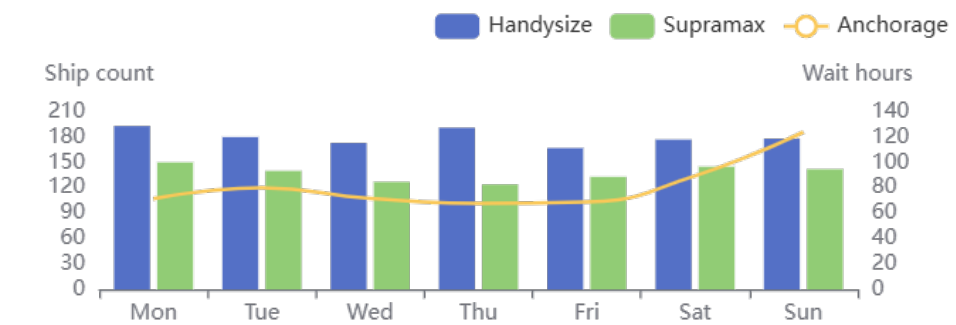


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

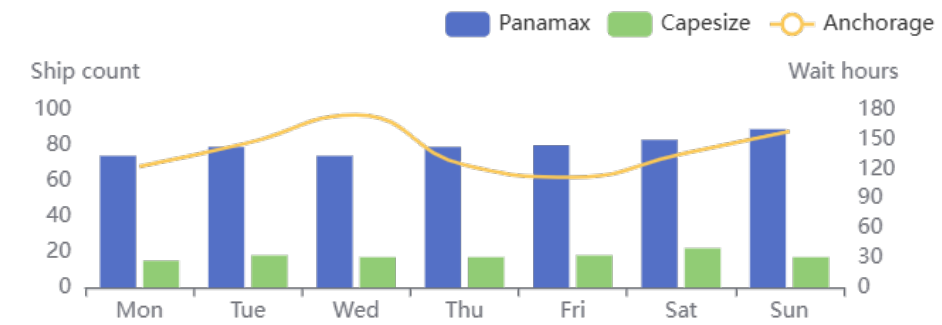
Type	M	T	W	Th	F	Sat	Sun
HDY	193	180	173	191	167	177	178
SMX	150	140	127	124	133	145	142
WT.h.	71.5	80	71.7	67.9	68.9	89.45	124



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

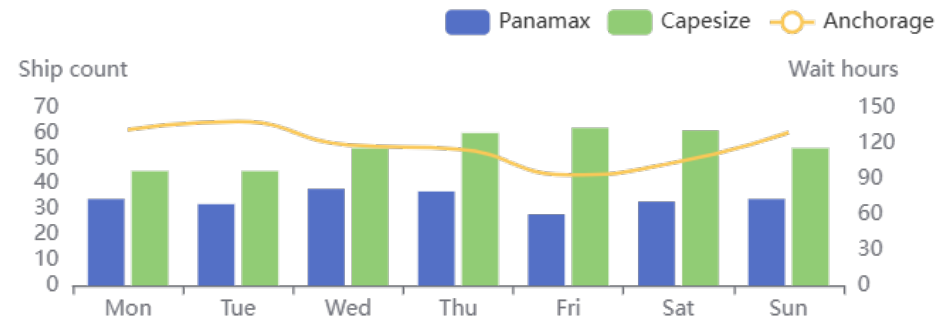
Type	M	T	W	Th	F	Sat	Sun
Pan.	74	79	74	79	80	83	89
Cap	15	18	17	17	18	22	17
WT.h.	122.3	146.3	174.5	124	111.7	134.9	158



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

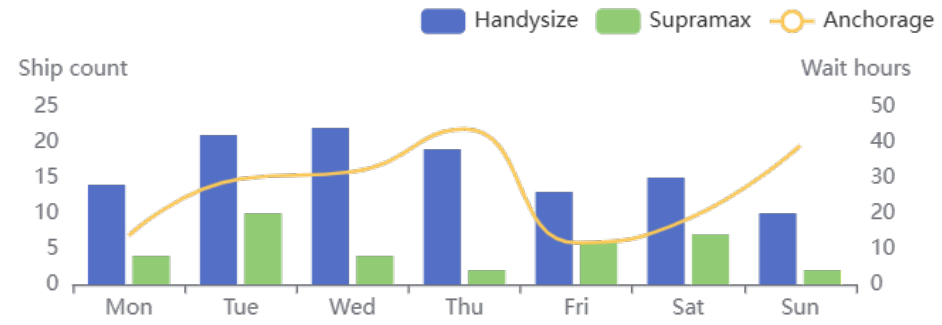
Type	M	T	W	Th	F	Sat	Sun
Pan.	34	32	38	37	28	33	34
Cap	45	45	54	60	62	61	54
WT.h.	131.4	138.3	118.5	115	93.2	104.3	129



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

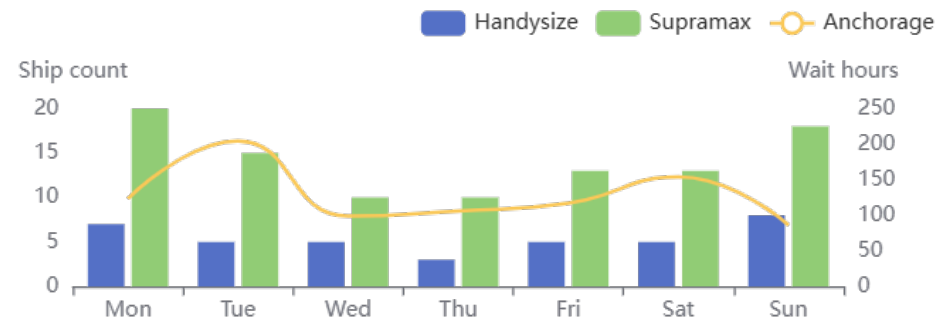
Type	M	T	W	Th	F	Sat	Sun
HDY	14	21	22	19	13	15	10
SMX	4	10	4	2	6	7	2
WT.h.	13.8	29.7	31.7	43.7	11.7	18.45	39



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

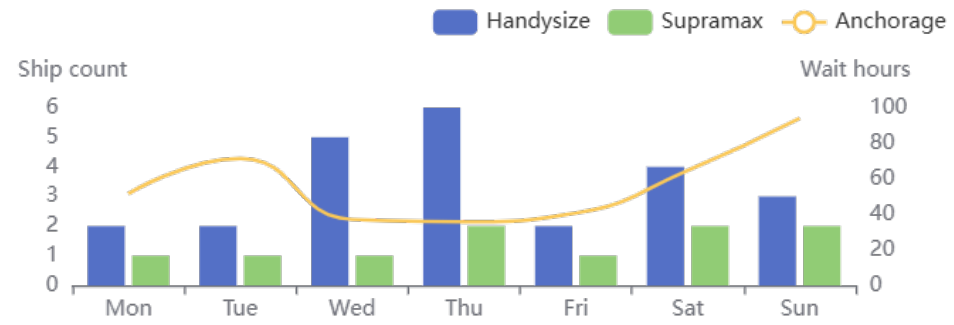
Type	M	T	W	Th	F	Sat	Sun
HDY	7	5	5	3	5	5	8
SMX	20	15	10	10	13	13	18
WT.h.	123.4	204.45	98.8	106.1	116.95	154.1	86



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

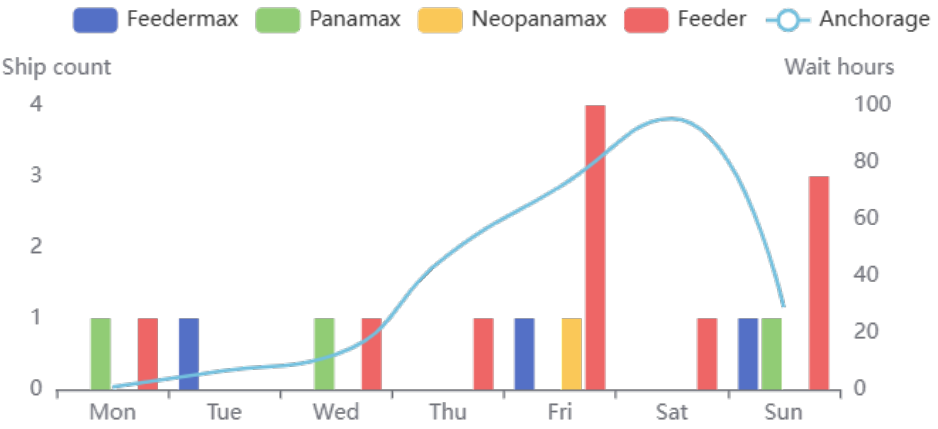
Type	M	T	W	Th	F	Sat	Sun
HDY	2	2	5	6	2	4	3
SMX	1	1	1	2	1	2	2
WT.h.	51.6	71.4	37.1	35.8	40.7	64.7	94



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

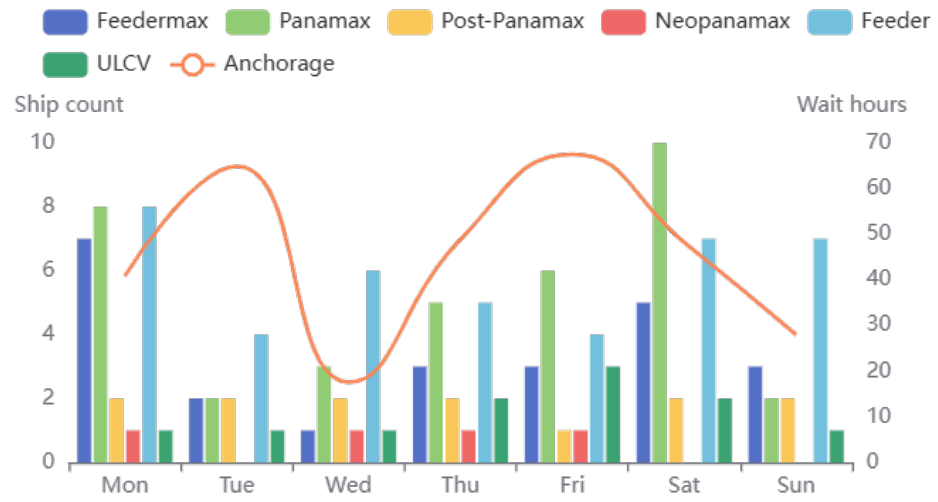
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	1	0	0	1	0	1
Pan.	1	0	1	0	0	0	1
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	1	0	0
Fd	1	0	1	1	4	1	3
WT.h.	0.9	6.6	12.4	47.4	71.4	95.4	29
Ulcw	0	0	0	0	0	0	0



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

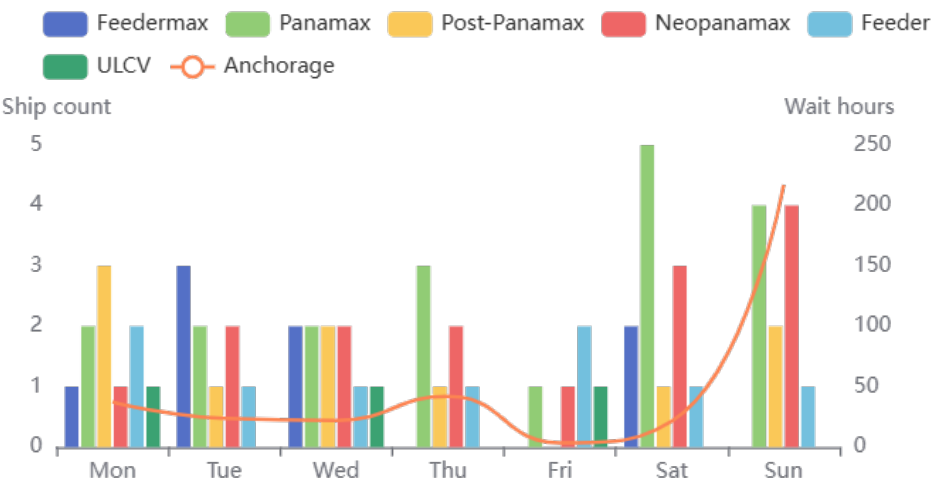
Type	M	T	W	Th	F	Sat	Sun
F.ma.	7	2	1	3	3	5	3
Pan.	8	2	3	5	6	10	2
PPx	2	2	2	2	1	2	2
NPx	1	0	1	1	1	0	0
Fd	8	4	6	5	4	7	7
Ulcw	1	1	1	2	3	2	1
WT.h.	40.9	64.9	17.6	48.9	67.5	48.2	28



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

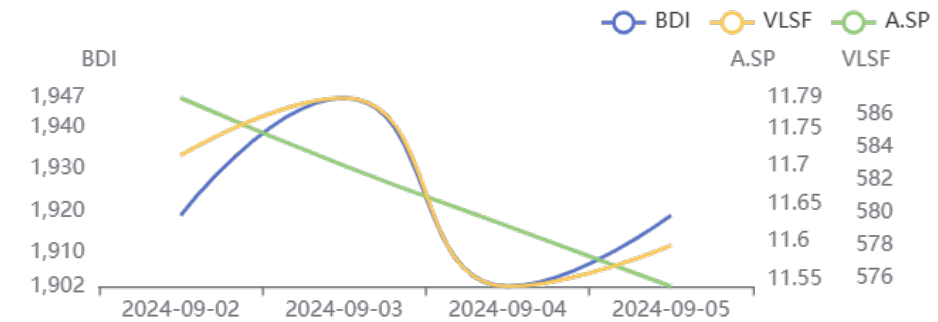
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	3	2	0	0	2	0
Pan.	2	2	2	3	1	5	4
PPx	3	1	2	1	0	1	2
NPx	1	2	2	2	1	3	4
Fd	2	1	1	1	2	1	1
Ulcw	1	0	1	0	1	0	0
WT.h.	37.4	23.8	22.2	42.2	3.5	21.4	217



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

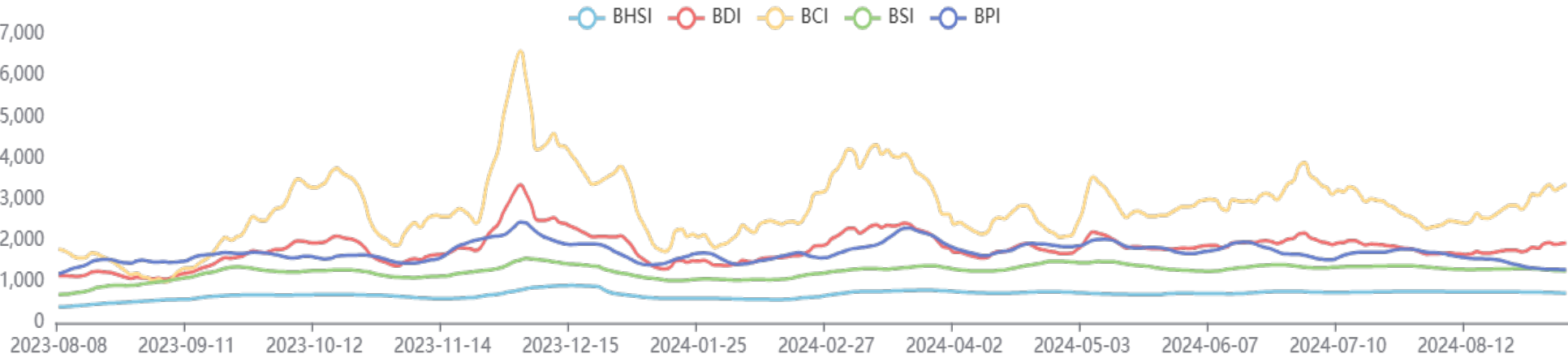
Type	M	T	W	Th	F	Sat	Sun
BDI	1305	1300	1300	1294	1294		
VLSF	583.50	587.00	575.50	578.00			
A.SP	11.79	11.7	11.62	11.54	11.63	11.75	



第三部分 航运市场 SHIPPING MARKET

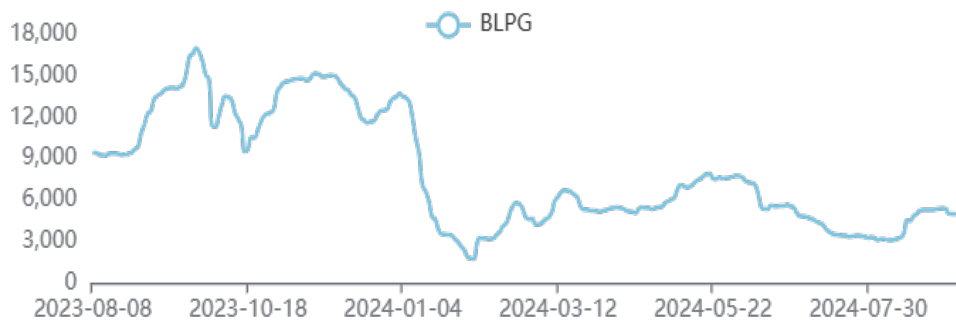
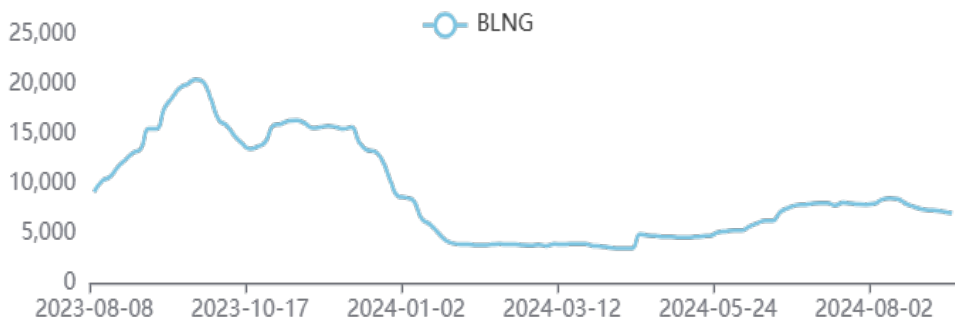
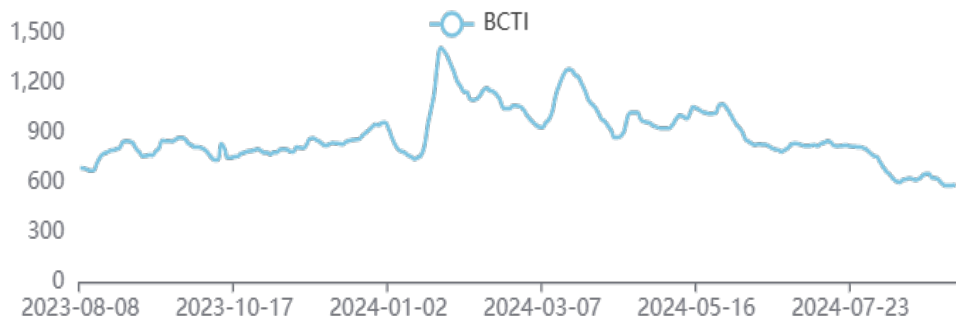
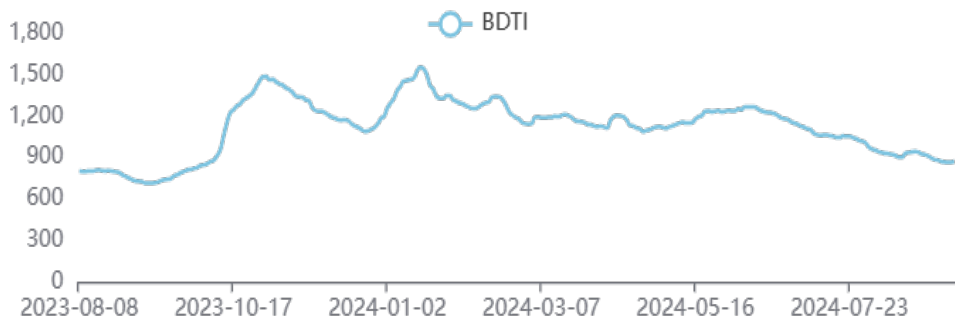
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1941	127.0	7.0	16.23	79.56
BCI	3356	257.0	8.29	37.71	224.56
BPI	1294	-22.0	-1.67	-19.07	-11.73
BSI	1260	-46.0	-3.52	-3.15	21.62
BHSI	724	-20.0	-2.69	-4.11	28.37

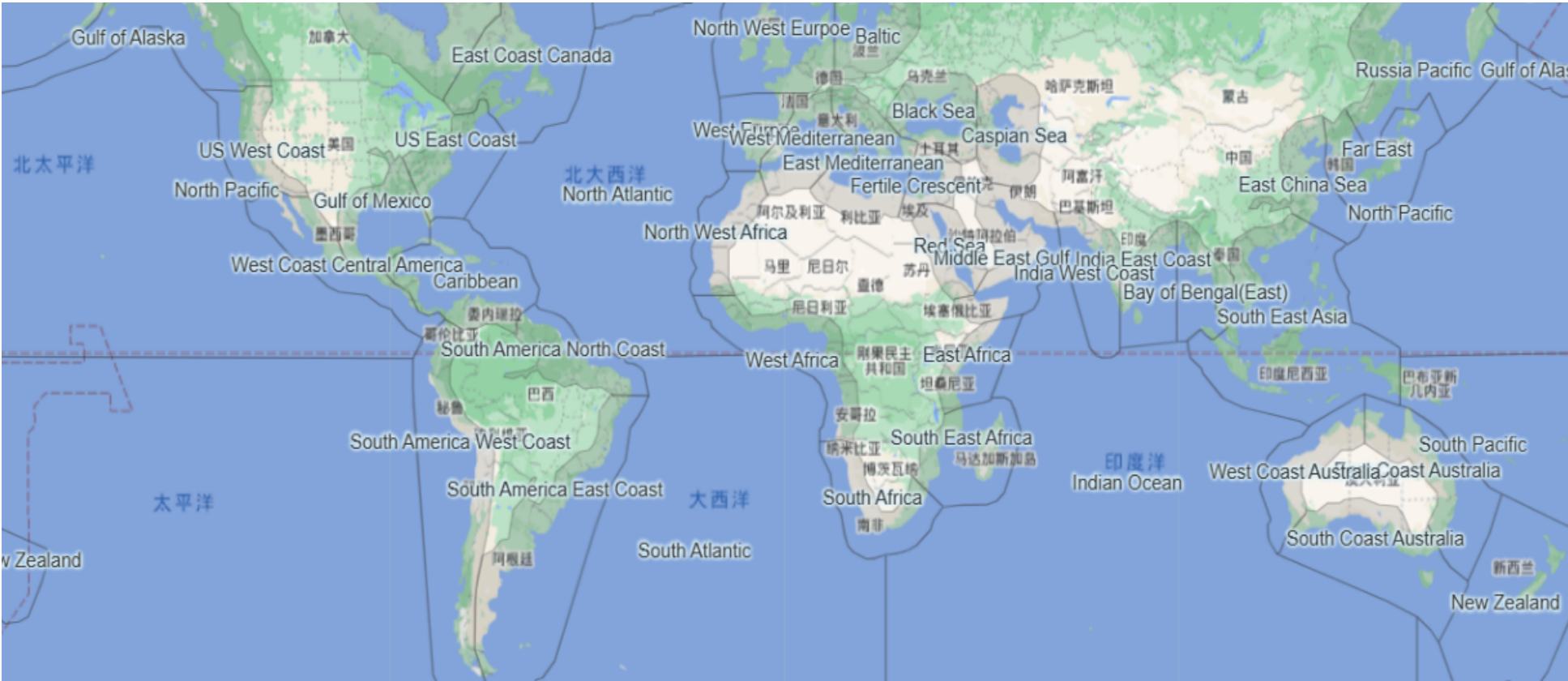


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	870	-11.0	-1.25	-5.64	20.0
BCTI	585	-29.0	-4.72	-5.95	-22.82
BLNG	7010	-240.0	-3.31	-17.6	-60.01
BLPG	4959	-400.0	-7.46	58.43	-62.76



第四部分 运力分布 SUPPLY DISTRIBUTION

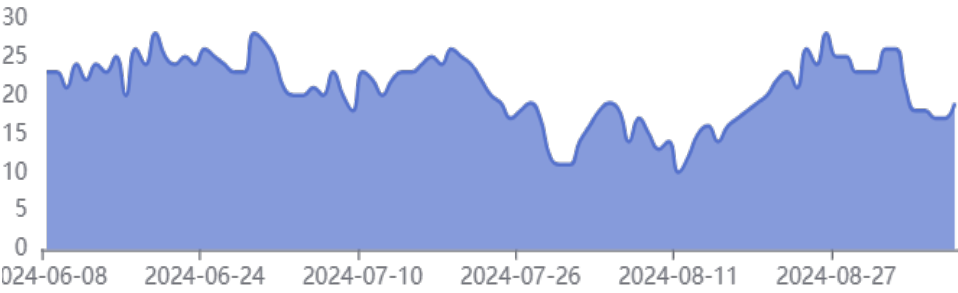


好望角型散货船 Capesize

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	26	21	18	18	17	17	19



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.

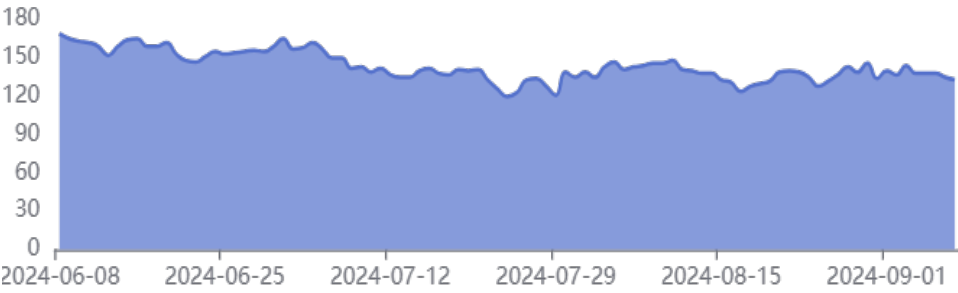
Type	M	T	W	Th	F	Sat	Sun
Cape	28	24	27	27	30	28	28

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.

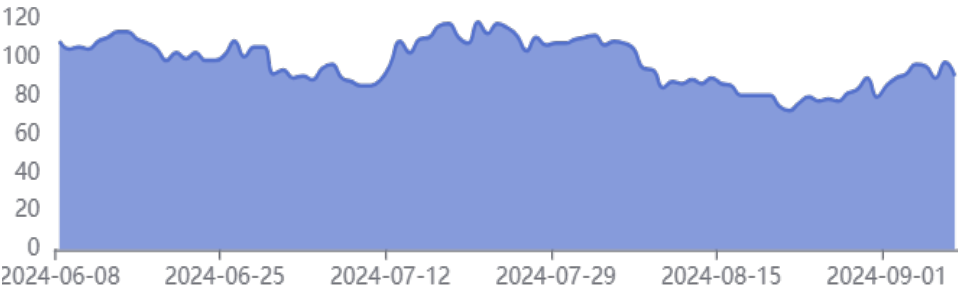
Type	M	T	W	Th	F	Sat	Sun
Pan.	136	143	137	137	137	134	132



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.

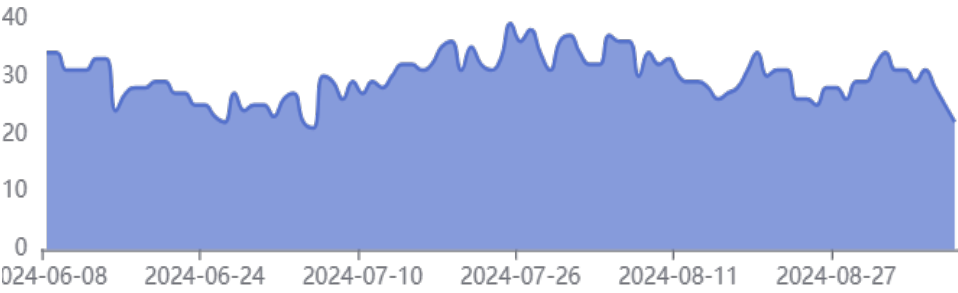
Type	M	T	W	Th	F	Sat	Sun
Cape	89	91	96	95	89	97	90



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.

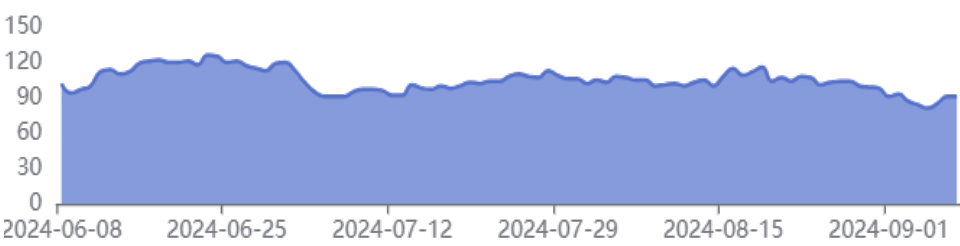
Type	M	T	W	Th	F	Sat	Sun
Pan.	21	19	23	22	19	19	21



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.	93	87	84	81	85	91	91

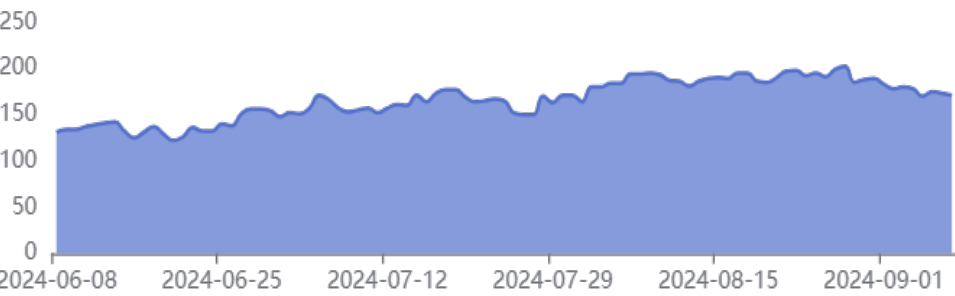


超大灵便型散货 SUPRAMAX

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.

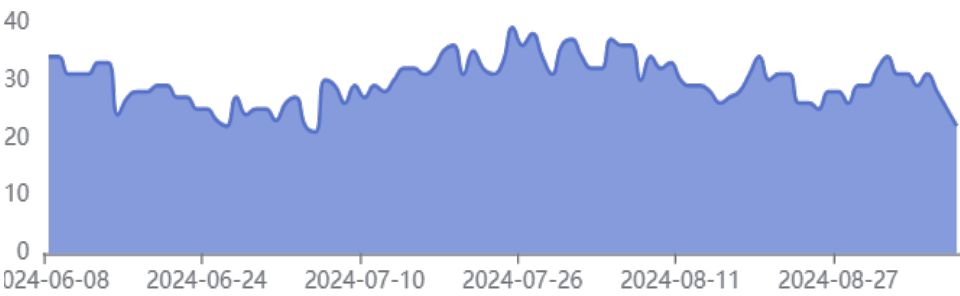
Type	M	T	W	Th	F	Sat	Sun
SMX	178	180	178	170	175	173	171



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.

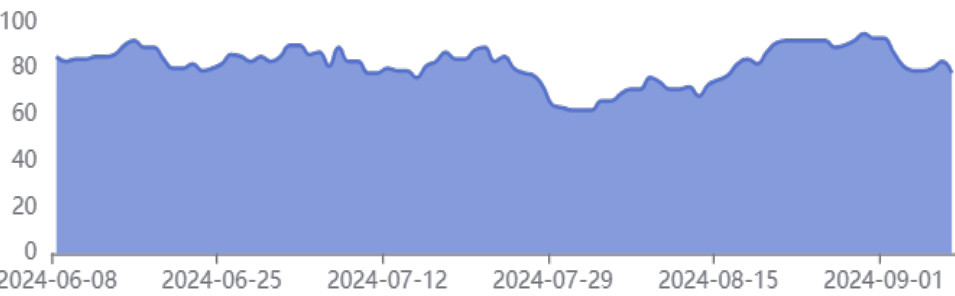
Type	M	T	W	Th	F	Sat	Sun
SMX	31	31	29	31	28	25	22



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.

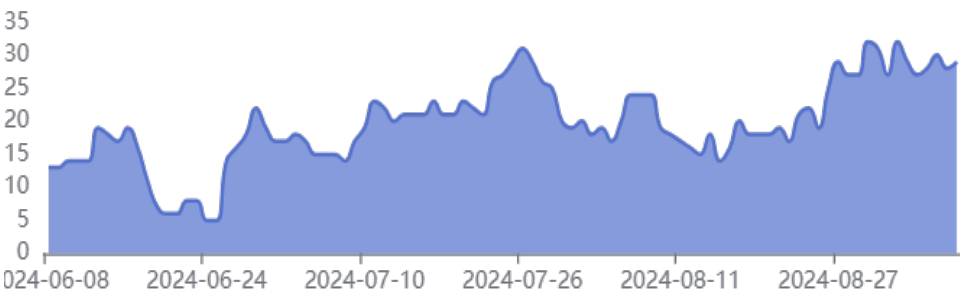
Type	M	T	W	Th	F	Sat	Sun
SMX	32	29	27	28	30	28	29



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.

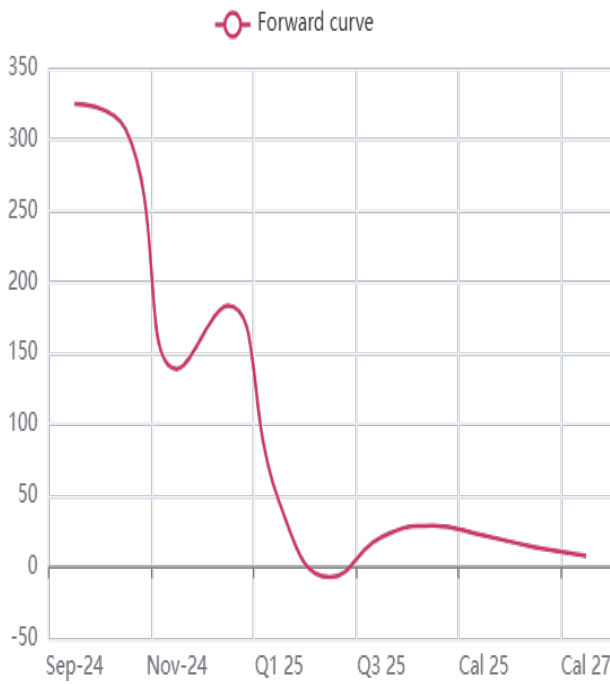
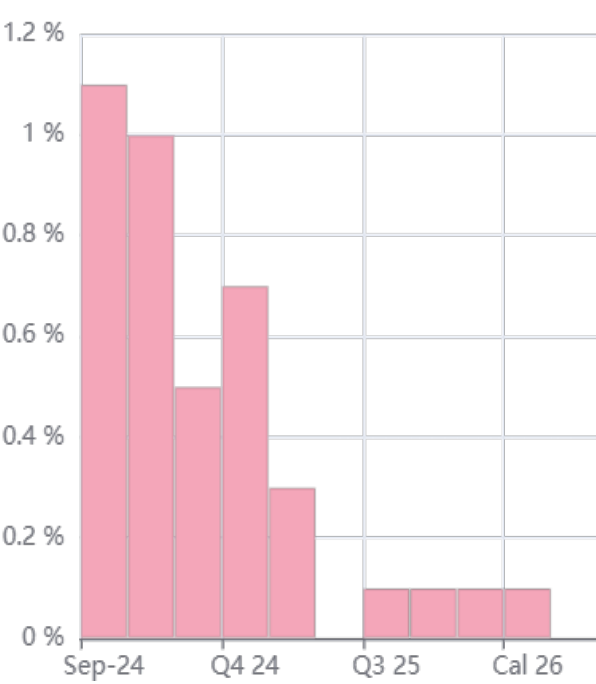
Type	M	T	W	Th	F	Sat	Sun
SMX	87	81	79	79	80	83	78



第五部分 远期运价协议 FFA

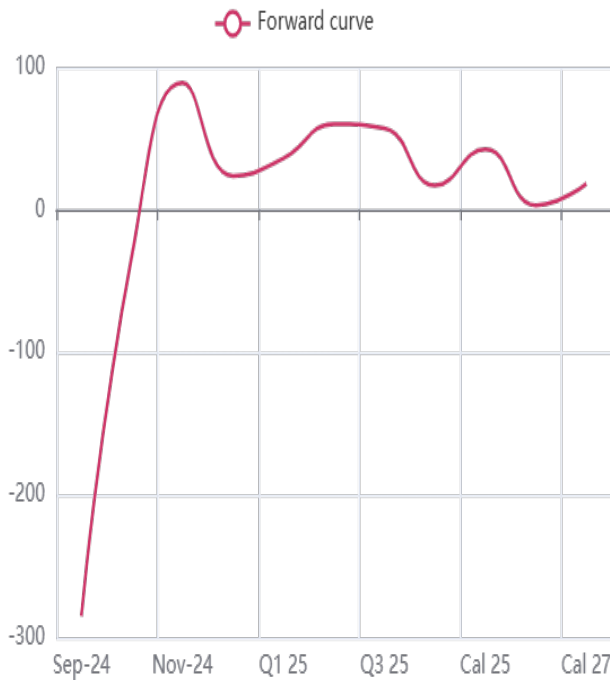
好望角型散货船Capesize

5TC	\$/day	WoW	
Sep-24	28,757.00	325.0	1.1 %
Oct-24	30,175.00	307.0	1.0 %
Nov-24	27,682.00	139.0	0.5 %
Q4 24	28,272.67	183.33	0.7 %
Q1 25	15,964.00	46.0	0.3 %
Q2 25	20,464.00	-7.0	0.0 %
Q3 25	25,150.00	21.0	0.1 %
Q4 25	25,136.00	29.0	0.1 %
Cal 25	21,678.50	22.25	0.1 %
Cal 26	21,095.75	14.0	0.1 %
Cal 27	20,229.00	8.0	0.0 %



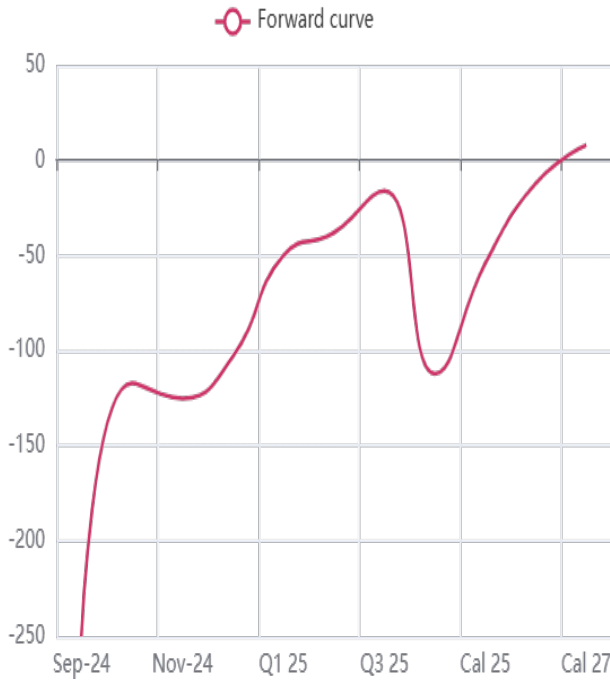
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Sep-24	11,679.00	-285.0	-2.4 %
Oct-24	14,211.00	-32.0	-0.2 %
Nov-24	14,414.00	89.0	0.6 %
Q4 24	14,263.00	23.67	0.2 %
Q1 25	11,668.00	36.0	0.3 %
Q2 25	13,271.00	60.0	0.5 %
Q3 25	13,146.00	57.0	0.4 %
Q4 25	12,771.00	17.0	0.1 %
Cal 25	12,714.00	42.5	0.3 %
Cal 26	12,531.75	3.0	0.0 %
Cal 27	12,386.00	18.0	0.1 %



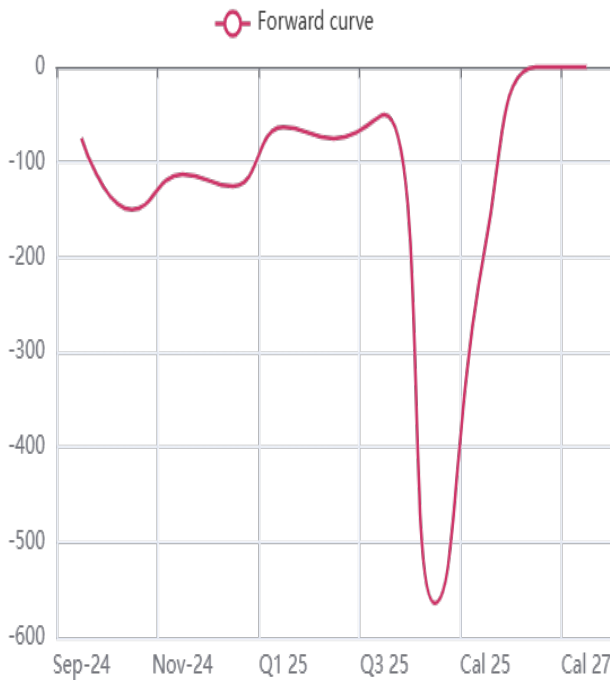
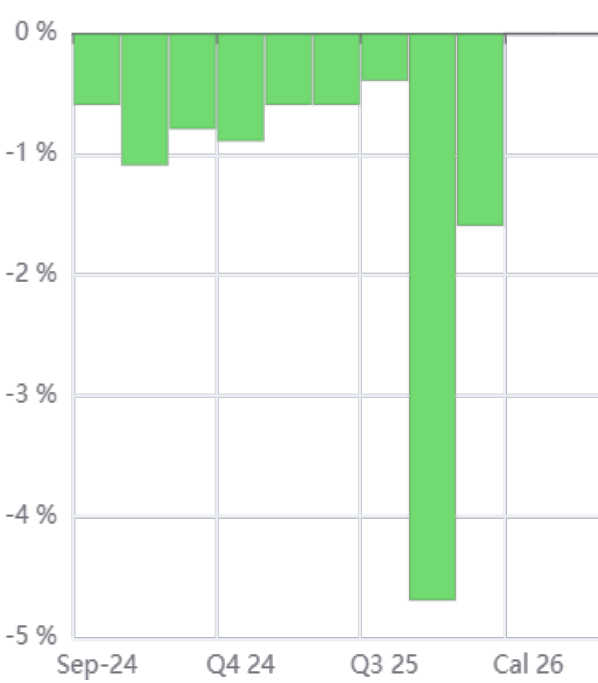
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Sep-24	13,908.00	-250.0	-1.8 %
Oct-24	14,300.00	-117.0	-0.8 %
Nov-24	14,100.00	-125.0	-0.9 %
Q4 24	14,141.67	-103.0	-0.7 %
Q1 25	11,600.00	-50.0	-0.4 %
Q2 25	13,179.00	-38.0	-0.3 %
Q3 25	13,163.00	-16.0	-0.1 %
Q4 25	12,642.00	-112.0	-0.9 %
12,646.00	Cal 25	-54.0	-0.4 %
Cal 26	12,367.00	-12.0	-0.1 %
Cal 27	12,271.00	8.0	0.1 %



灵便型散货船Handysize

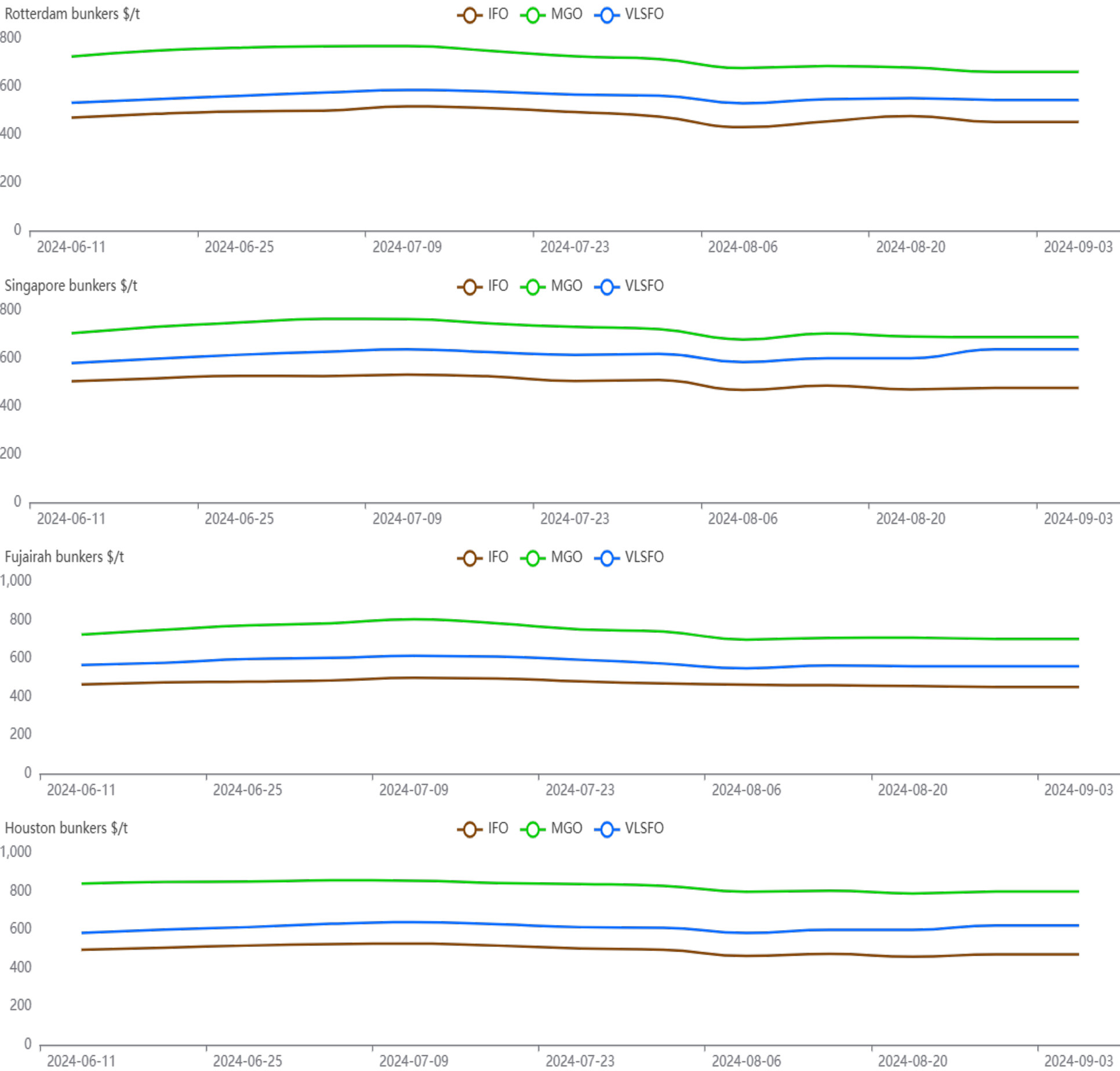
7TC	\$/day	WoW	
Sep-24	13,213.00	-75.0	-0.6 %
Oct-24	13,375.00	-150.0	-1.1 %
Nov-24	13,200.00	-113.0	-0.8 %
Q4 24	13,191.67	-125.33	-0.9 %
Q1 25	10,750.00	-63.0	-0.6 %
Q2 25	12,213.00	-75.0	-0.6 %
Q3 25	12,213.00	-50.0	-50.0
Q4 25	11,348.00	-564.0	-4.7 %
Cal 25	11,631.00	-188.0	-1.6 %
Cal 26	11,550.00	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	620.0	488.0	736.5	132.0	0.0	0.0	34.01
Singapore	639.0	477.5	690.0	161.5	0.0	0.0	38.63
Rotterdam	545.5	453.5	662.5	92.0	0.0	0.0	-8.0
Fujairah	560.0	452.5	703.0	107.5	0.0	0.0	25.0
Houston	623.0	472.5	800.5	150.5	0.0	0.0	25.42

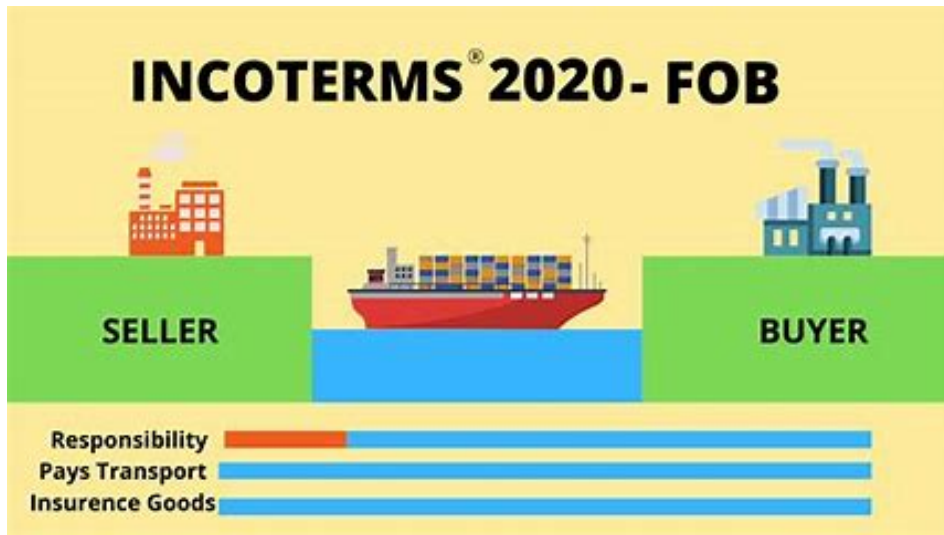
(MP-Bunkering Main Ports; LO-Heavy Low Sulphur Fuel Oil; HO-Heavy Hight Sulphur Fuel Oil; MO-MGO; SP-Spread;)



第七部分 最新商品价格 LATEST COMMODITIES PRICE

Grains and Oilseeds	Index		+/-	Weekly	Monthly	YTD
Wheat	195.0		0.0	0.0	-2.5	-16.34
Maize	200.0		0.0	0.0	-0.99	-13.21
Soybeans	198.0		0.0	0.0	-6.16	-20.02
Rice	246.0		0.0	0.0	-0.4	-9.66
Barley	204.0		0.0	0.0	-4.67	-11.75
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	75.77	0.0	0.0	5.18	-5.45
Brent	USD/Bbl	79.98	0.0	0.0	6.07	-5.58
Natural Gas	USD/MMBtu	2.01	0.0	0.0	5.24	-22.99
Gasoline	USD/Gal	2.29	0.0	0.0	0.88	-19.08
Heating Oil	USD/Gal	2.33	0.0	0.0	2.19	-28.96
Ethanol	USD/Gal	1.83	0.0	0.0	1.67	-14.88
Naphtha	USD/T	658.97	0.0	0.0	2.22	2.6
Propane	USD/Gal	0.77	0.0	0.0	5.48	13.24
Uranium	USD/Lbs	82.4	0.0	0.0	-0.24	41.46
Methanol	CNY/T	2444.0	0.0	0.0	-0.49	-1.57
TTF Gas	EUR/MWh	36.7	0.0	0.0	-7.84	3.7
UK Gas	GBp/thm	88.0	0.0	0.0	-2.05	1.56
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.22	0.0	0.0	5.5	12.23
Coal	USD/T	145.2	0.0	0.0	0.76	-2.81
Steel	CNY/T	3053.0	0.0	0.0	0.43	-17.33
Iron Ore	USD/T	98.05	0.0	0.0	-5.72	-16.55
Aluminum	USD/T	2542.0	0.0	0.0	13.36	18.21
Lithium	CNY/T	74000.0	0.0	0.0	-6.92	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2524.0	0.0	0.0	4.31	31.77
Silver	USD/t.oz	30.1	0.0	0.0	9.45	24.48
Platium	USD/t.oz	967.0	0.0	0.0	4.87	2.59
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.12		0.0	0.0	2.75	3.7
USD/CNY	7.12		0.0	0.0	0.14	-2.47

第八部分 本周话题 WEEKLY TOPIC



浅谈FOB贸易下海运环节的风险

中国作为贸易大国，可能超过80%的跨国贸易采用FOB模式，在FOB贸易模式下，买卖双方和船舶都会面临各自特有的风险。

首先为了保护FOB贸易中卖方的权利，国际法允许卖方实施货物中途停运权和货物运输法中卖方的控制权。然而FOB中的卖方绝大多数情况下并非货物运输合同的当事人，想让船舶配合行驶其权力操作起来比较复杂，或者成本很高。有时当卖方代为办理货物运输时，如果碰上货物价值大幅度下滑而低于运费时，可能面对买方拒收货并且不支付运费的风险，卖家又要面对船东的各种索赔。

国际贸易中买卖双方采用FOB贸易条款进行交易时，通常还是由买方安排货物运输，卖方负责将货物在双方约定的港口装载至买方指定的船舶，在这个过程中，买方通常委托代理为其办理装港事宜，卖方为方便起见或按照买方的指示，将货物交予同一代理，并委托其办理货物的报关等事宜。在该代理与买卖双方均存在委托代理关系并且没有明确约定提单应当交付给哪一方的情况下，时常发生代理人将船舶或船舶委托签发的提单交给了买方，这直接导致卖方失去货物控制权并面临无法收回货款的巨大风险，此时代理也将面临其过失的

赔偿责任。

装货港，FOB贸易模式下出现船等货时，由此产生的滞期由卖方负责；当出现货等船时，则由此产生的额外港口仓储费和保管费等由买方承担。港口的装卸效率也是买卖双方需要根据实际情况商定的重要因数，也是船舶计算运费的重要参数。

FOB贸易模式下卖方承担的义务是要在规定的期限将货物运到指定的装运港，并在装运港负责将货物装到船上，由买方安排货物运输的船舶及保险。为了确保货物的安全交付，托运人一般会提出对参与航次货物运输船舶的各种要求，例如船龄，非敏感船舶，适航适货当然是最基本要求等，还需要被认可的船舶能赶上装货约定日期。有时船舶的租金水平大幅度攀升时，买家将面临很高的租船代价。海运贸易市场的买家一般会综合根据货运任务和市场趋势在市场上和船舶经营人商定好运输任务，尽量规避市场波动带来的价格波动风险。

船舶在国际货物运输中扮演着绝对重要的角色，作为贸易买卖双方，都希望他们的贸易执行能够平顺和安全，除了市场原因造成一些交易的风险，最大的风险还是来自海上和船舶本身的风险。船舶可能不适航，会导致货物的灭失；船舶的不适货会导致货物的损害；船舶管理能力不足会导致货损或货差索赔的风险；船舶被PSC滞留可能会导致货物的延迟交付；船舶被黑名单或在航行途中被制裁了会导致货物交付的问题，等等。

FOB术语下面临的隐性风险，还包括买方办理运输导致的无单放货，倒签提到，信用证失效，保险缺失导致的保险事件拒付拒赔风险等。最后还是市场普遍采用的知道你客户的背景最为重要，尤其重要的是知道船舶的背景。

As a major trading country, China may adopt the FOB model for more than 80% of its cross-border trade, under which the buyer and seller and the ship will face their own unique risks.

First of all, in order to protect the seller's rights in FOB trade, international law allows the seller to implement the right of stopping the goods in transit and the seller's right of control in cargo transport law. However, in most cases, the seller in FOB is not the party to the contract of carriage of goods, and it is more complicated or costly to make the ship cooperate with its right to operate. Sometimes when the seller handles the transportation of the goods, if the value of the goods falls significantly and is lower than the freight, the buyer may face the risk of rejecting the goods and not paying the freight, and the seller must face various claims from the shipowner.

In international trade, the buyer usually arranges the transportation of the goods, and the seller is responsible for loading the goods to the ship designated by the buyer at the port agreed by the two parties. In this process, the buyer usually entrusts an agent to handle the port of loading for him, and the seller delivers the goods to the same agent for convenience or according to the instructions of the buyer. And entrust it to handle the customs declaration of goods and other matters. In the case that there is an agency contract relationship between the agent and both the buyer and the seller and there is no clear agreement on which party the bill of lading should be delivered to, it often happens that the agent hands over the ship or the bill of lading entrusted by the ship to the buyer, which directly causes the seller to lose the control of the goods and face the great risk of being unable to recover the payment, and the agent will also face the compensation liability for its negligence.

Port of loading, when there is a ship waiting for goods under FOB trade mode, the demurrage resulting therefrom shall be borne by the seller; When there is a cargo ship, the additional port storage charges and storage charges arising therefrom shall be borne by the buyer. The loading and unloading efficiency of the port is also an important factor that the buyer and the seller need to agree on according to the actual situation, and it is also an important parameter for the ship to calculate the freight.

Under FOB trade mode, the seller undertakes the obligation to deliver the goods to the designated loading port within the specified time limit, and is responsible for loading the goods onto the ship at the loading port. The buyer arranges the ship and insurance for the transportation of the goods. In order to ensure the safe delivery of goods, shippers generally put forward a variety of requirements for ships involved in the voyage of cargo transport, such as ship age, non-sensitive ships, seaworthy goods are of course the most basic requirements, but also need to be recognized ships can catch up with the agreed date of loading. Sometimes when the rental level of the ship rises significantly, the buyer will face a high cost of chartering the ship. Buyers in the maritime trade market generally agree on transportation tasks with ship operators in the market according to freight tasks and market trends, and try to avoid the risk of price fluctuations caused by market fluctuations.

Ships play an absolutely important role in the international transport of goods, as trade buyers and sellers, all want their trade execution to be smooth and safe, in addition to market reasons for some transaction risks, the biggest risk is from the sea and the ship itself. The ship may be unseaworthy, resulting in the loss of cargo; The inadequacy of the ship may cause damage to the cargo; The risk that inadequate ship management will result in claims for damage or shortfalls; The detention of the vessel by the PSC may result in the delay in the delivery of the cargo; Ships being blacklisted or sanctioned in transit will cause problems with the delivery of goods, and so on.

The hidden risks faced under FOB term also include the release of goods without presenting bills of lading caused by the buyer's handling of transportation, the Anti dated bills of lading, the invalidity of letter of credit, and the risk of non-payment of insurance events caused by lack of insurance. Finally, it is generally adopted in the market that knowing your clients is the most important, especially knowing the background of the ship.

刘红太