



2024年 第37周市场周报

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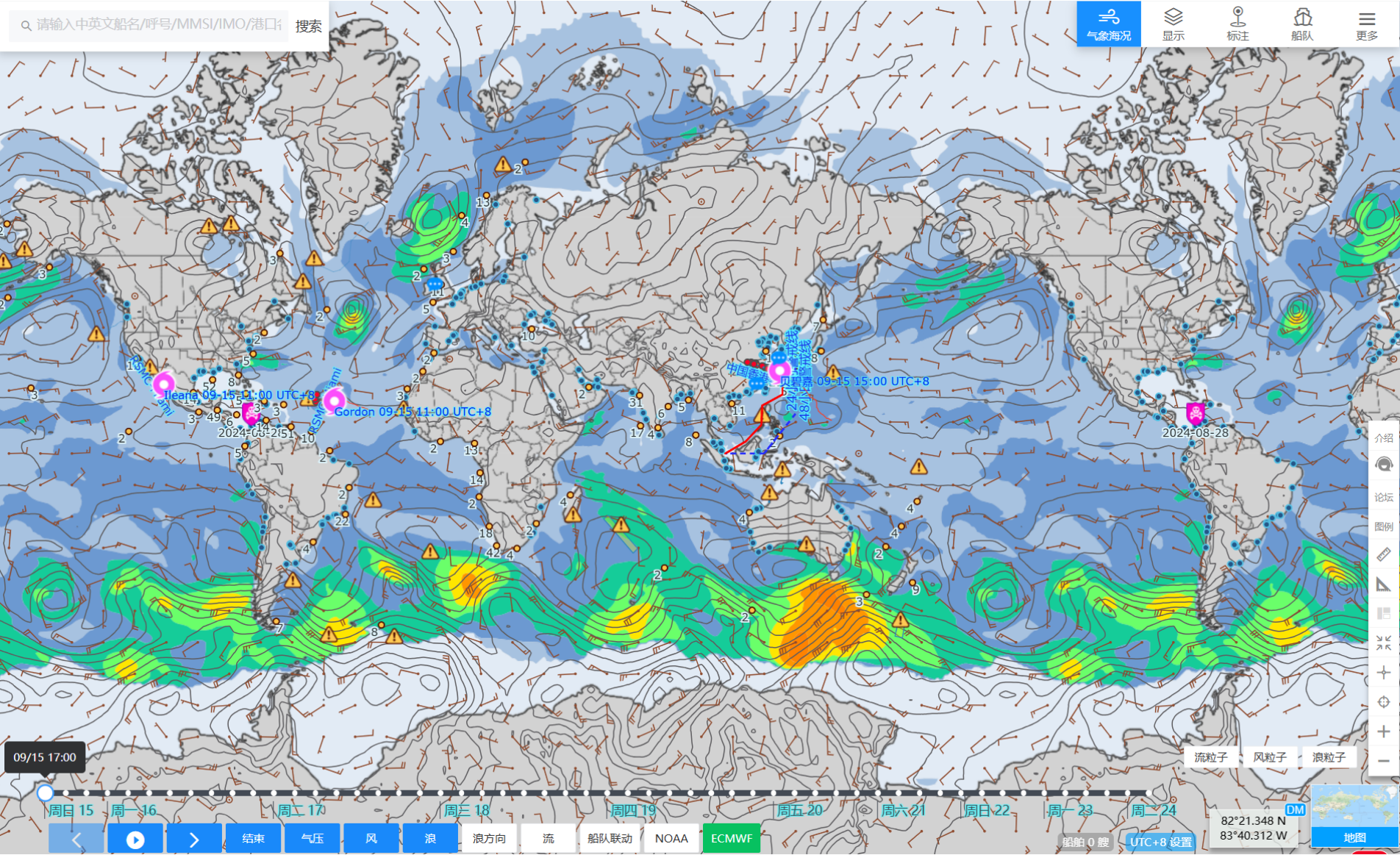
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最新商品价格 LATEST COMMODITIES PRICE

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874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 874 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4-6级，相关海域2米中浪；黄海风力维持6-7级，相关海域中浪；东海将经历台风，相关海域巨浪；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5-6级，轻浪。贝碧嘉台风预计于16日早上正面袭击上海。The coming week the wind in Bohai Sea stays strong breeze with moderate seas. Yellow Sea experiences strong with moderate wave. And China East Sea will experience typhoon with very high wave. The wind in the Taiwan Strait becomes strong and sea there experience rough. In most of the South China Sea the wind is strong with moderate sea. The typhoon BEBINCA will land Shanghai in the morning of 16th Sep.

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

乌克兰当局称，9月11号周三晚些时候，一枚俄罗斯导弹在黑海击中了一艘运载小麦的船只。幸运的是没有人员伤亡，当时这艘船正驶向埃及，事件发生时该船刚刚离开乌克兰水域之后。Ukrainian authorities say a Russian missile hit a ship carrying wheat in the Black Sea late Wednesday, September 11. Fortunately there were no casualties. The ship was heading to Egypt at the time and the incident happened just after it left Ukrainian waters.

其它 Others

没有 Nil

备注 Remark

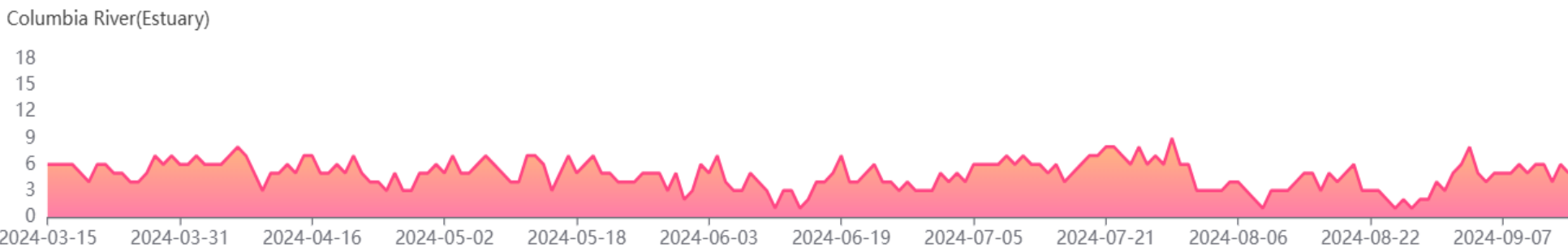
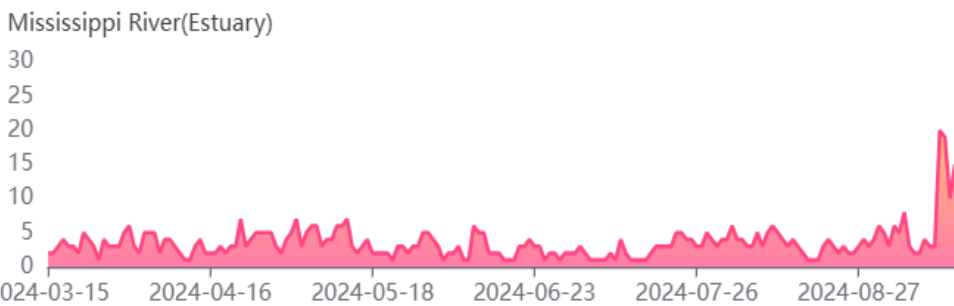
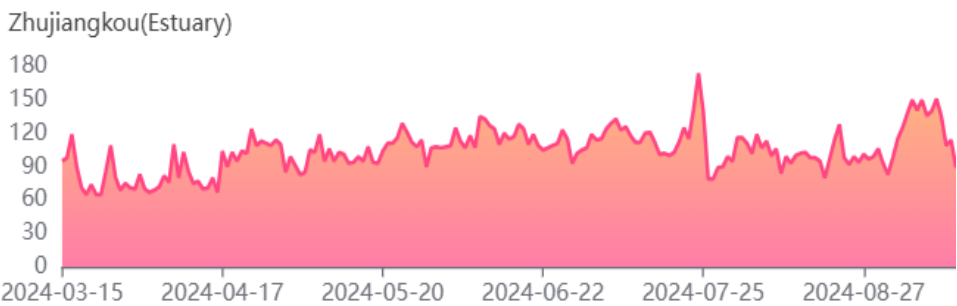
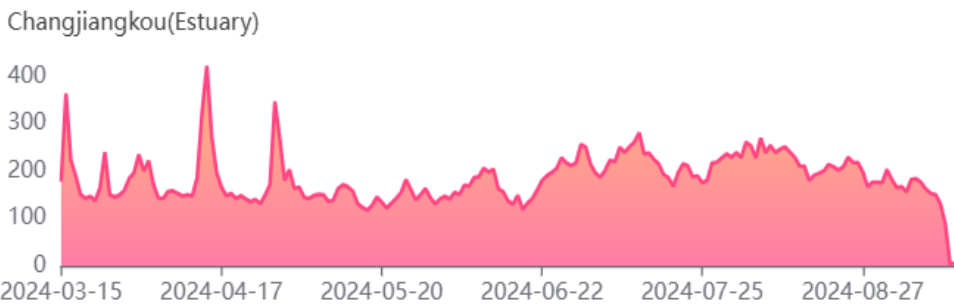
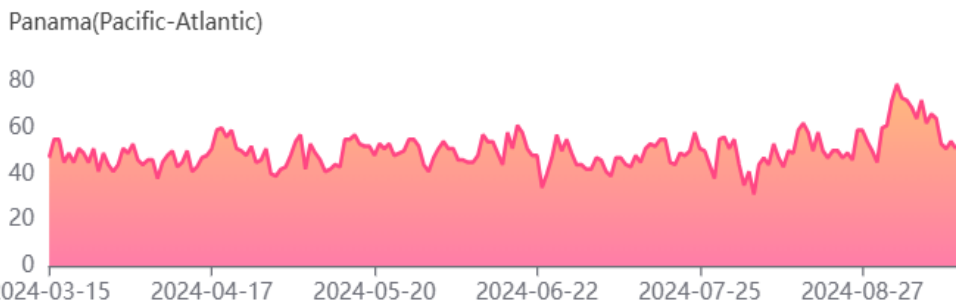
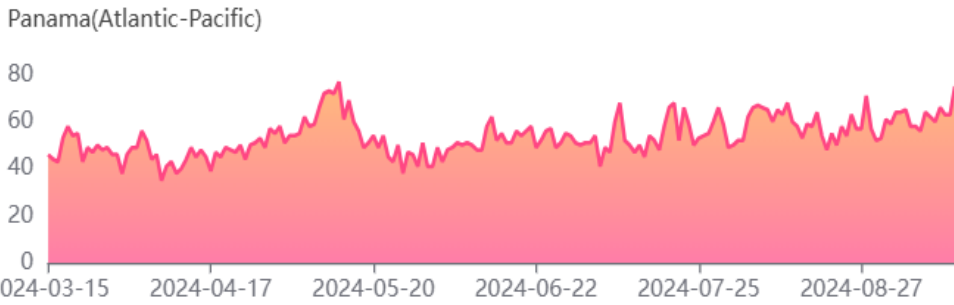
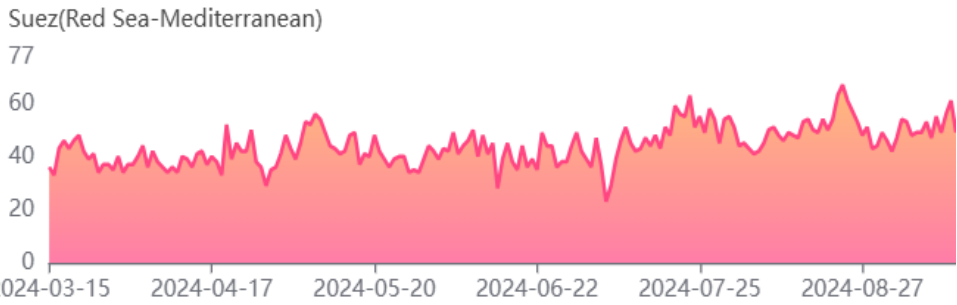
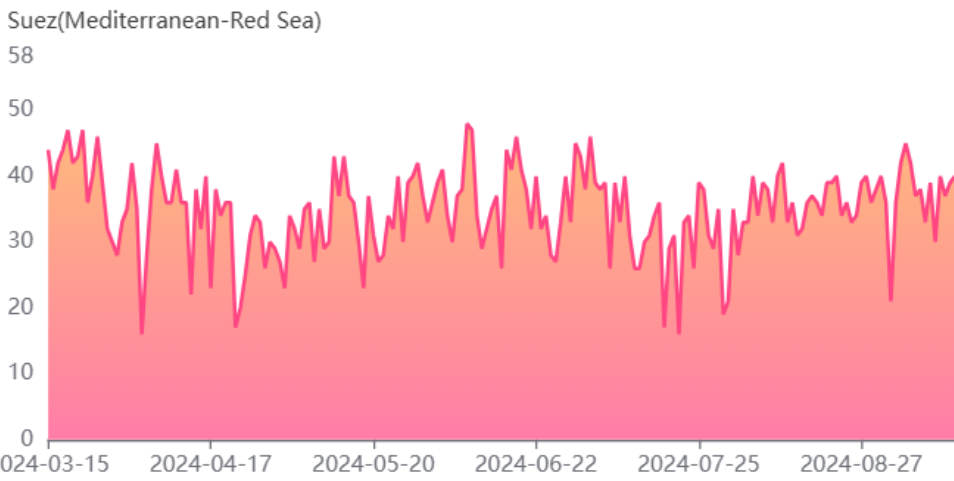
本报告数据截止时间为2024年9月15日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Sep 15th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	49	1501	31	50
Miss.Riv.	15	149	42	40
CJK	6	4895	-546	-1557
Pa.Atlan.	75	1731	24	20
Colum.Riv.	5	122	0	-16
Suez.Med.	40	1073	-1	116
Pa.Pac.	51	1687	-89	267
ZJK	89	3267	24	179

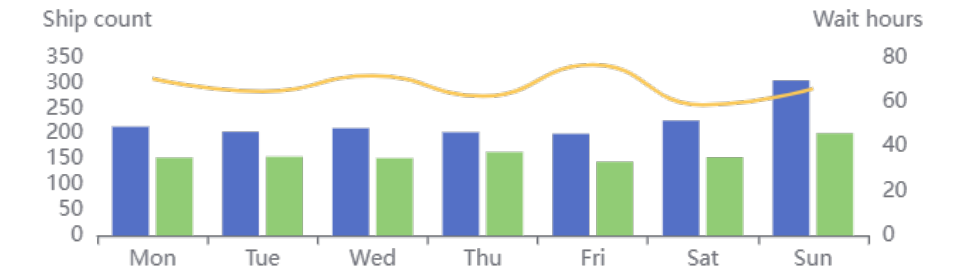
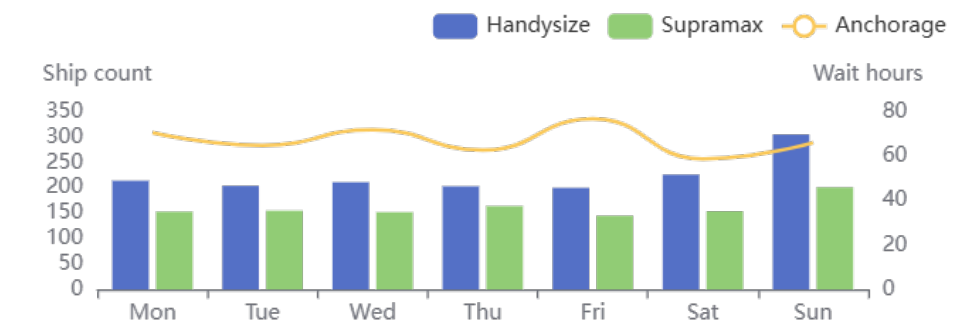


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

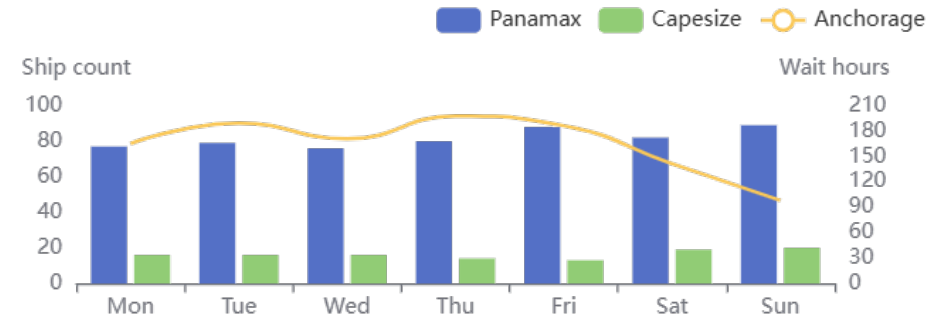
Type	M	T	W	Th	F	Sat	Sun
HDY	214	204	211	203	200	226	305
SMX	153	155	152	164	145	154	201
WT.h.	70.6	64.8	71.9	62.7	76.8	58.75	66



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

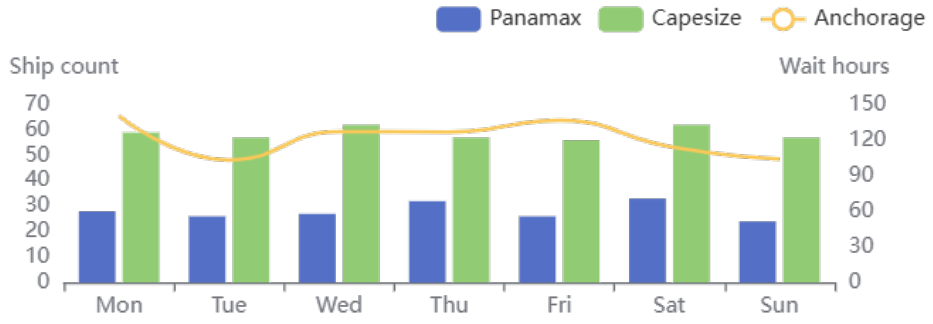
Type	M	T	W	Th	F	Sat	Sun
Pan.	77	79	76	80	88	82	89
Cap	16	16	16	14	13	19	20
WT.h.	165.3	189.3	170.85	197.8	186.3	141.3	98



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

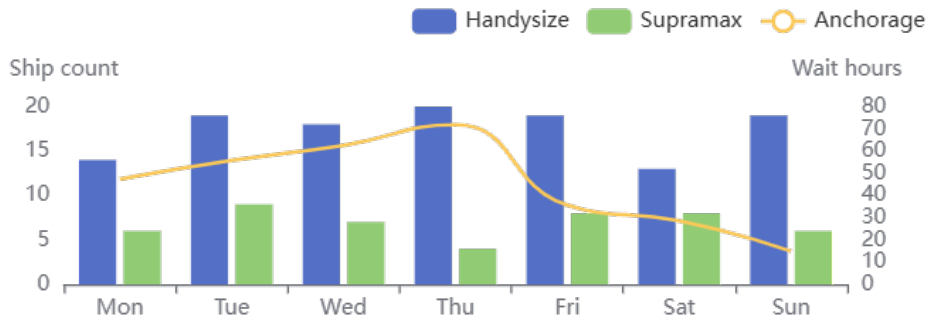
Type	M	T	W	Th	F	Sat	Sun
Pan.	28	26	27	32	26	33	24
Cap	59	57	62	57	56	62	57
WT.h.	140.5	103.3	127.3	126.9	136.7	114.6	104



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

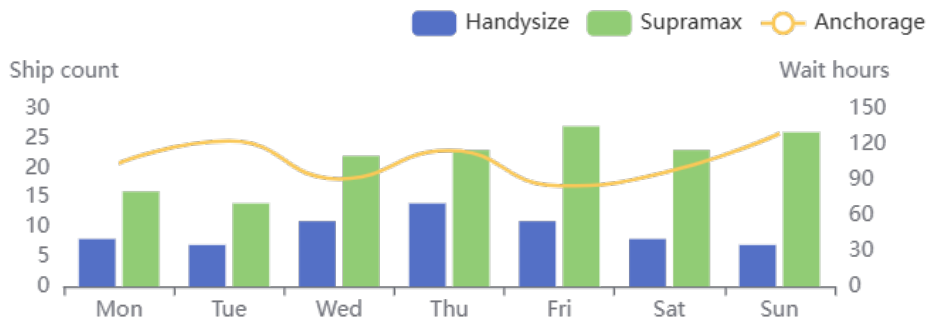
Type	M	T	W	Th	F	Sat	Sun
HDY	14	19	18	20	19	13	19
SMX	6	9	7	4	8	8	6
WT.h.	47.35	55.8	62.6	71.9	35.7	28.6	15



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

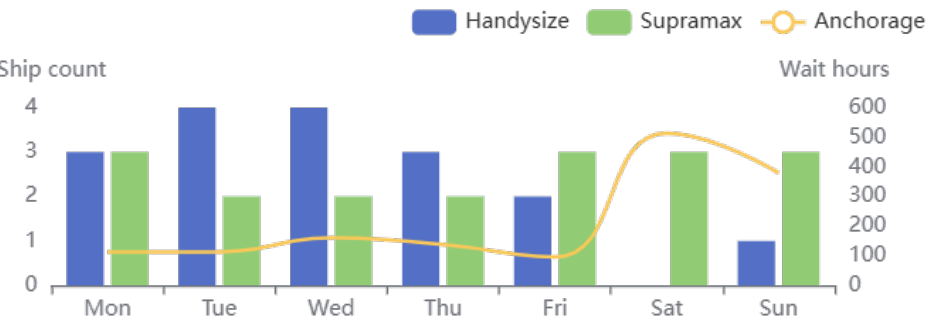
Type	M	T	W	Th	F	Sat	Sun
HDY	8	7	11	14	11	8	7
SMX	16	14	22	23	27	23	26
WT.h.	104.1	122.8	90.7	114.7	84.9	97.2	129



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

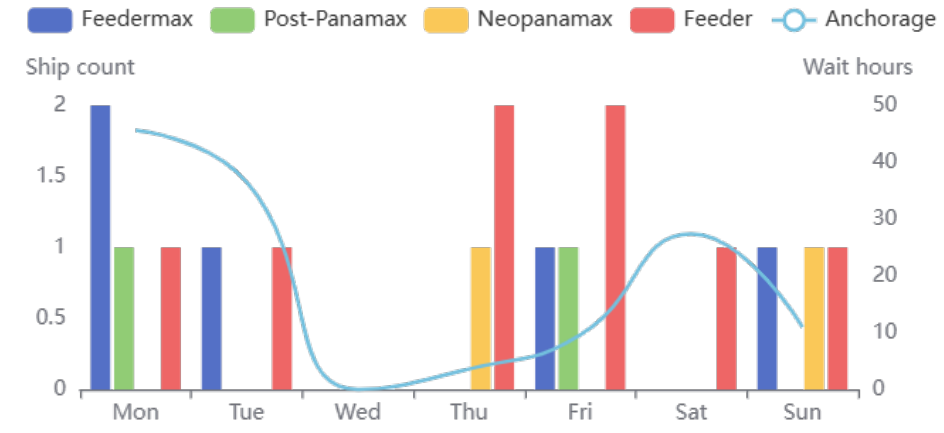
Type	M	T	W	Th	F	Sat	Sun
HDY	3	4	4	3	2	0	1
SMX	3	2	2	2	3	3	3
WT.h.	112.7	113.35	160.7	138	95.9	513.7	379.5



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

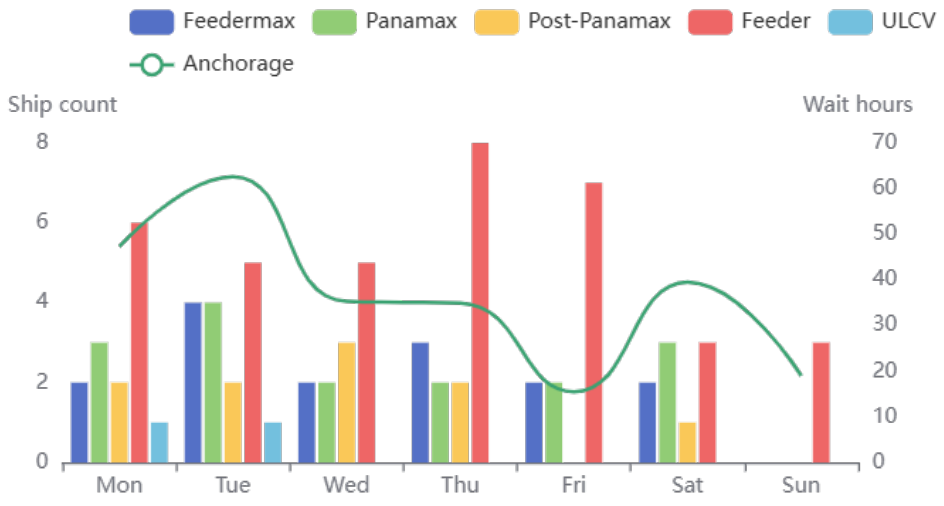
Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	1	0	0	1	0	1
Pan.	0	0	0	0	0	0	0
PPx	1	0	0	0	1	0	0
NPx	0	0	0	1	0	0	1
Fd	1	1	0	2	2	1	1
WT.h.	45.65	36.5	0.0	3.6	9.6	27.4	11
Ulcw	0	0	0	0	0	0	0



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

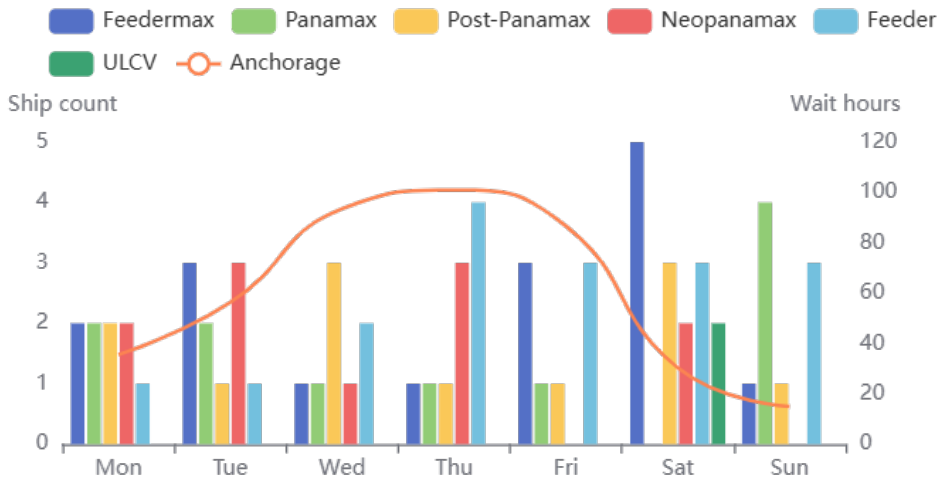
Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	4	2	3	2	2	0
Pan.	3	4	2	2	2	3	0
PPx	2	2	3	2	0	1	0
NPx	0	0	0	0	0	0	0
Fd	6	5	5	8	7	3	3
Ulcw	1	1	0	0	0	0	0
WT.h.	47.3	62.6	35.3	34.9	15.5	39.5	19



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

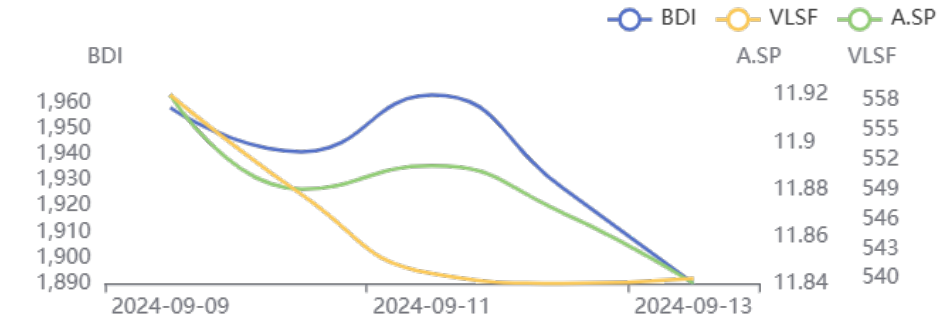
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	3	1	1	3	5	1
Pan.	2	2	1	1	1	0	4
PPx	2	1	3	1	1	3	1
NPx	2	3	1	3	0	2	0
Fd	1	1	2	4	3	3	3
Ulcw	0	0	0	0	0	2	0
WT.h.	35.6	56.3	93.55	101	86.65	30.4	15



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

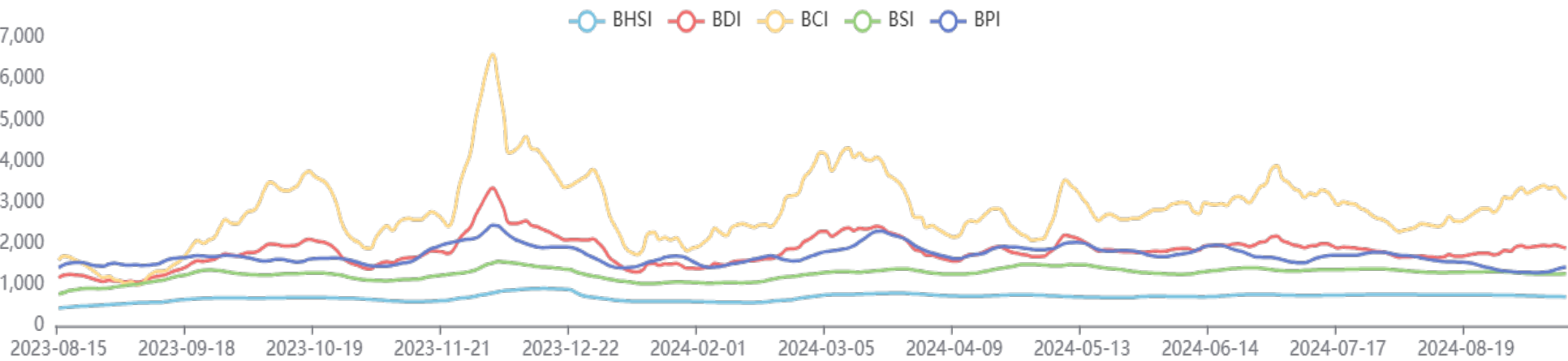
Type	M	T	W	Th	F	Sat	Sun
BDI	1302	1317	1356	1402	1428		
VLSF	558.50	548.50	540.50	539.50	540.00		
A.SP	11.92	11.88	11.89	11.87	11.84	11.64	



第三部分 航运市场 SHIPPING MARKET

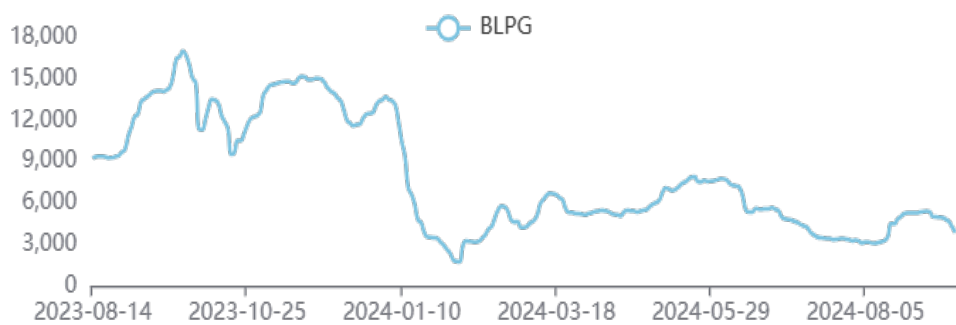
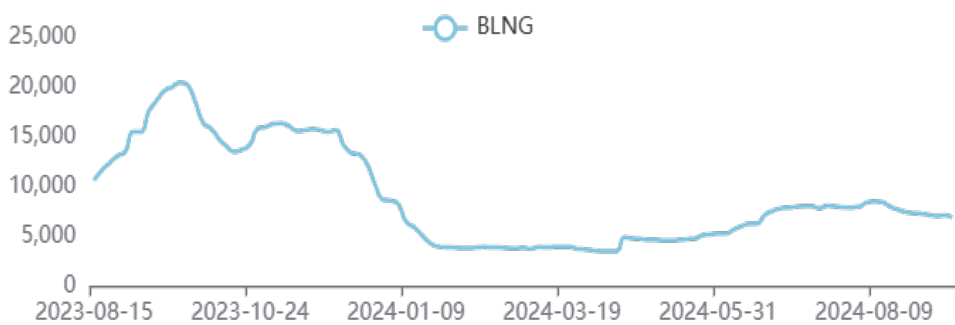
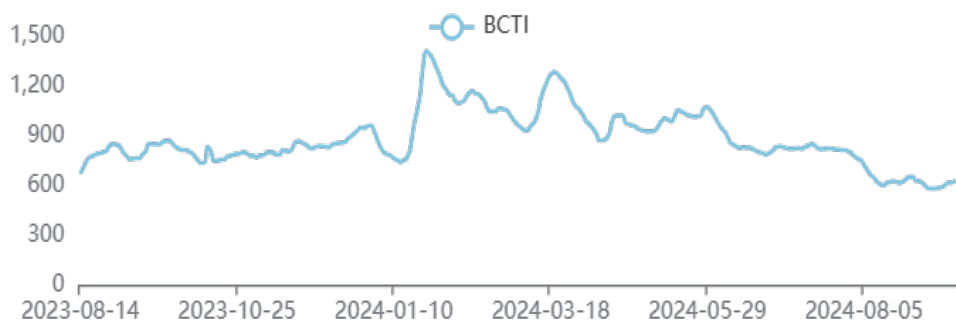
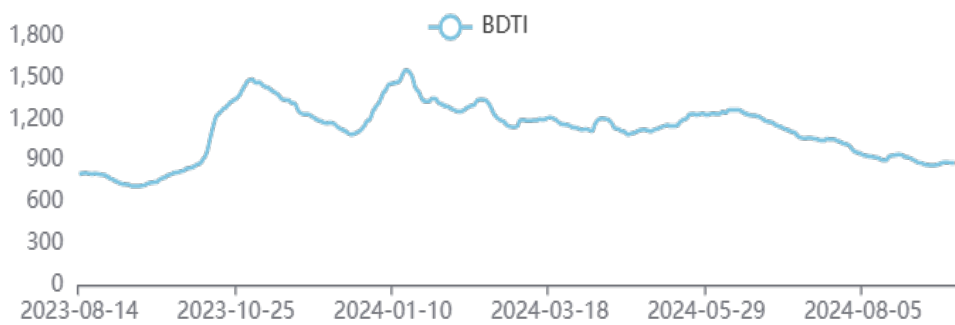
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1890	-51.0	-2.63	11.77	46.51
BCI	3089	-267.0	-7.96	21.76	118.15
BPI	1428	134.0	10.36	-7.99	-12.01
BSI	1264	4.0	0.32	-3.07	9.34
BHSI	707	-17.0	-2.35	-6.23	17.44



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	883	13.0	1.49	-5.66	22.3
BCTI	632	47.0	8.03	1.12	-21.49
BLNG	6861	-149.0	-2.13	-14.09	-65.0
BLPG	3866	-1093.0	-22.04	-13.88	-72.61



第四部分 运力分布 SUPPLY DISTRIBUTION

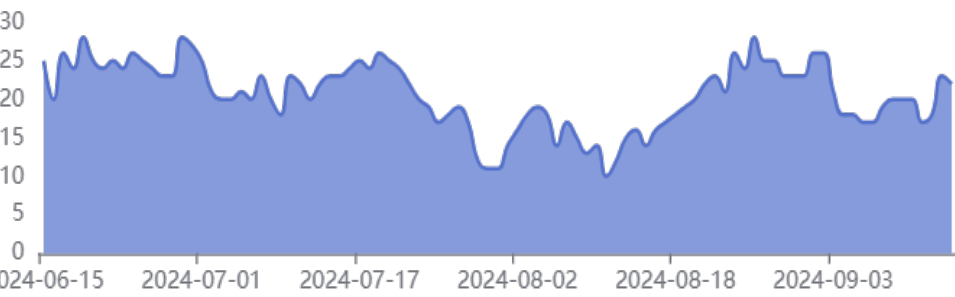


好望角型散货船 Capesize

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	20	20	20	17	18	23	22



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.

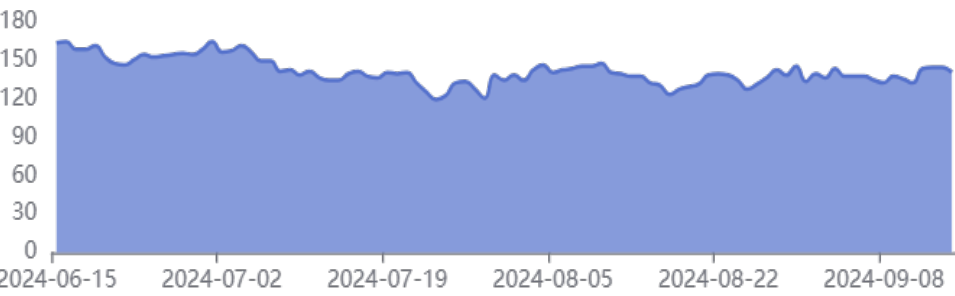
Type	M	T	W	Th	F	Sat	Sun
Cape	26	22	19	21	23	24	27

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.

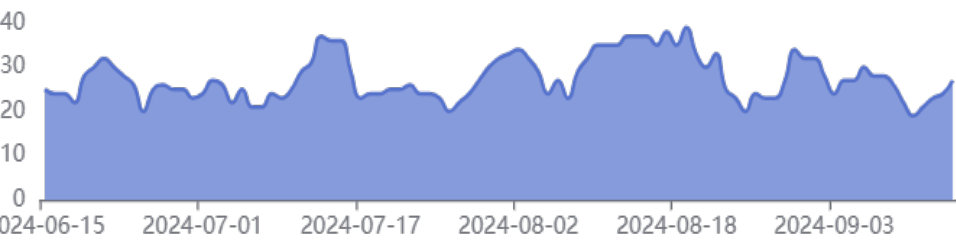
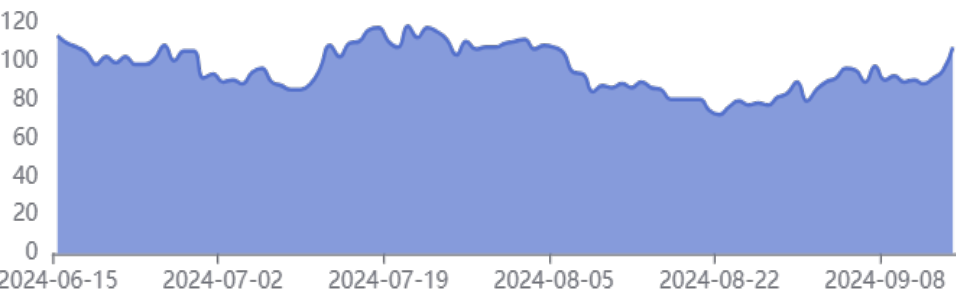
Type	M	T	W	Th	F	Sat	Sun
Pan.	137	135	132	143	144	144	140



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.

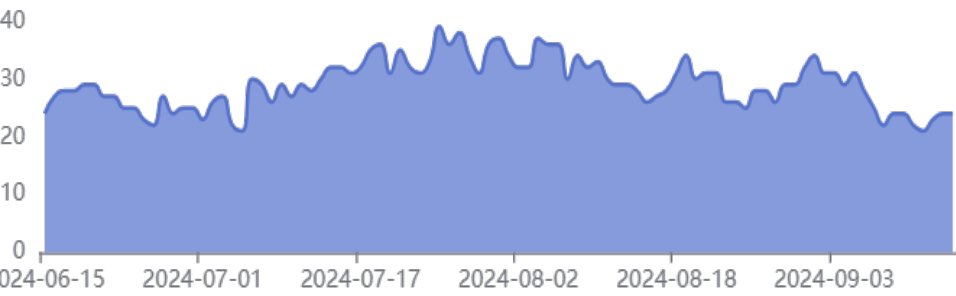
Type	M	T	W	Th	F	Sat	Sun
Cape	92	89	90	88	91	95	107



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.

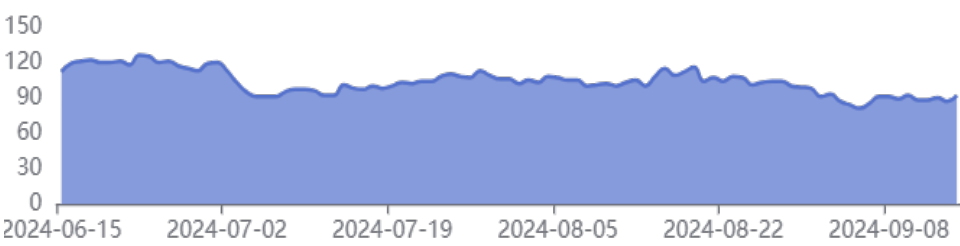
Type	M	T	W	Th	F	Sat	Sun
Pan.	22	25	25	27	24	25	23



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.	89	92	88	88	90	87	92

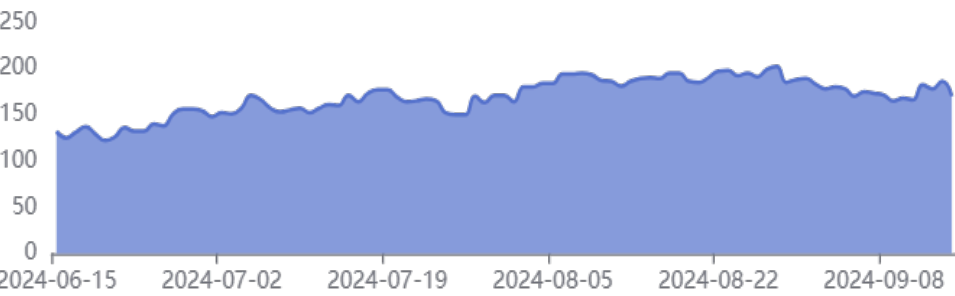


超大灵便型散货 SUPRAMAX

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.

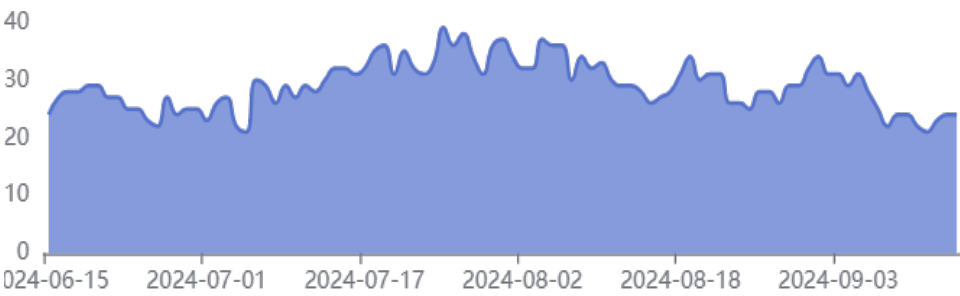
Type	M	T	W	Th	F	Sat	Sun
SMX	165	168	166	182	178	186	170



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.

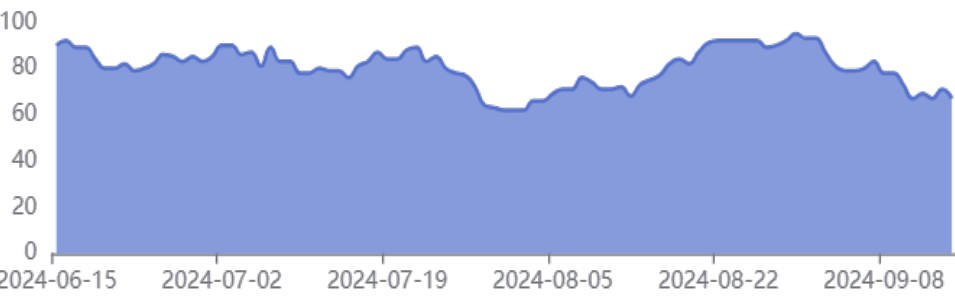
Type	M	T	W	Th	F	Sat	Sun
SMX	24	24	22	21	23	24	24



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.

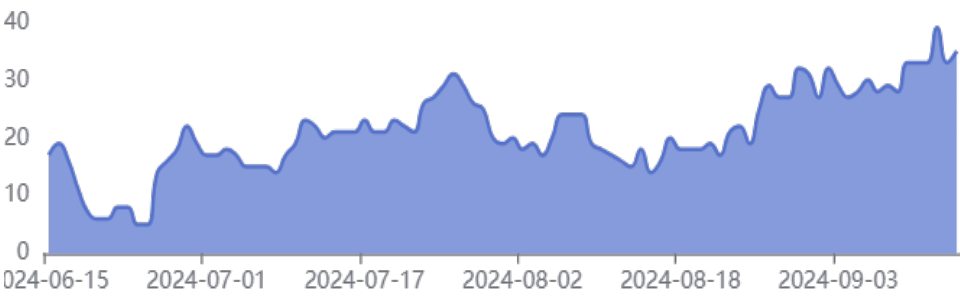
Type	M	T	W	Th	F	Sat	Sun
SMX	28	33	33	33	39	33	35



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.

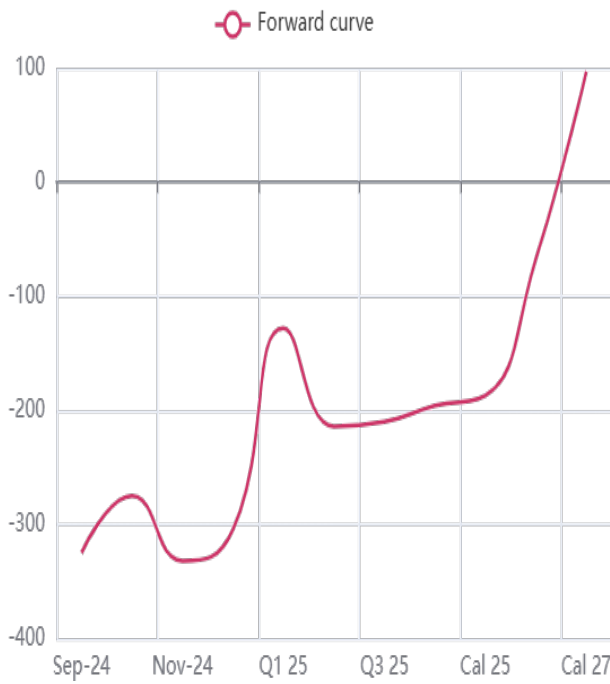
Type	M	T	W	Th	F	Sat	Sun
SMX	78	73	67	69	67	71	67



第五部分 远期运价协议 FFA

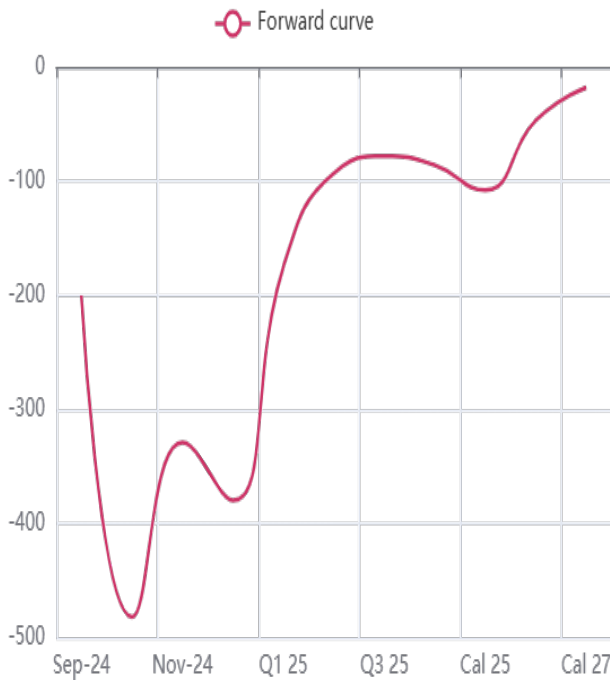
好望角型散货船Capesize

5TC	\$/day	WoW	
Sep-24	26,700.00	-325.0	-1.2 %
Oct-24	28,396.00	-275.0	-1.0 %
Nov-24	26,339.00	-332.0	-1.2 %
Q4 24	26,926.00	-304.67	-1.1 %
Q1 25	15,529.00	-128.0	-0.8 %
Q2 25	20,000.00	-214.0	-1.1 %
Q3 25	24,579.00	-210.0	-0.8 %
Q4 25	24,600.00	-196.0	-0.8 %
Cal 25	21,177.00	-187.0	-0.9 %
Cal 26	20,918.00	-67.75	-0.3 %
Cal 27	20,254.00	97.0	0.5 %



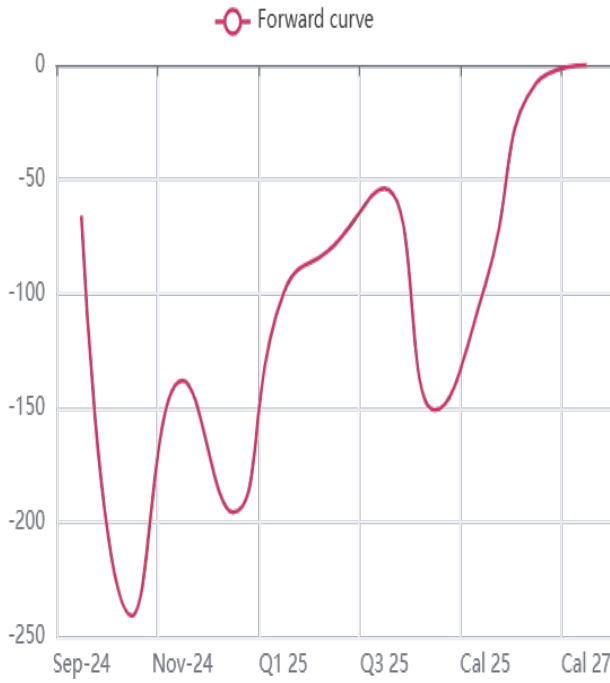
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Sep-24	11,611.00	-200.0	-1.7 %
Oct-24	13,500.00	-482.0	-3.4 %
Nov-24	13,982.00	-329.0	-2.3 %
Q4 24	13,773.67	-380.0	-2.7 %
Q1 25	11,482.00	-175.0	-1.5 %
Q2 25	13,207.00	-93.0	-0.7 %
Q3 25	13,093.00	-78.0	-0.6 %
Q4 25	12,707.00	-86.0	-0.7 %
Cal 25	12,622.25	-108.0	-0.8 %
Cal 26	12,496.25	-46.75	-0.4 %
Cal 27	12,382.00	-18.0	-0.1 %



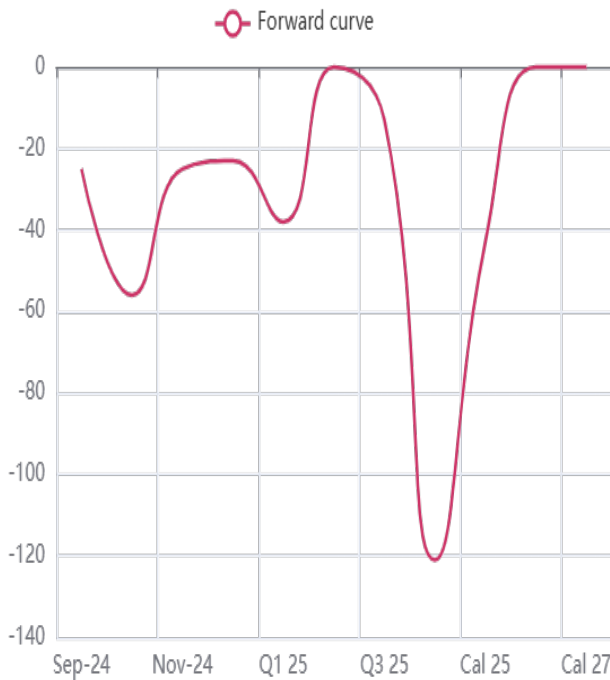
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Sep-24	14,117.00	-66.0	-0.5 %
Oct-24	14,292.00	-241.0	-1.7 %
Nov-24	14,204.00	-138.0	-1.0 %
Q4 24	14,129.33	-195.67	-1.4 %
Q1 25	11,442.00	-100.0	-0.9 %
Q2 25	13,317.00	-79.0	-0.6 %
Q3 25	13,200.00	-54.0	-0.4 %
Q4 25	12,809.00	-151.0	-1.2 %
12,692.00	Cal 25	-96.0	-0.8 %
Cal 26	12,496.00	-8.0	-0.1 %
Cal 27	12,308.00	0.0	0.0 %



灵便型散货船Handysize

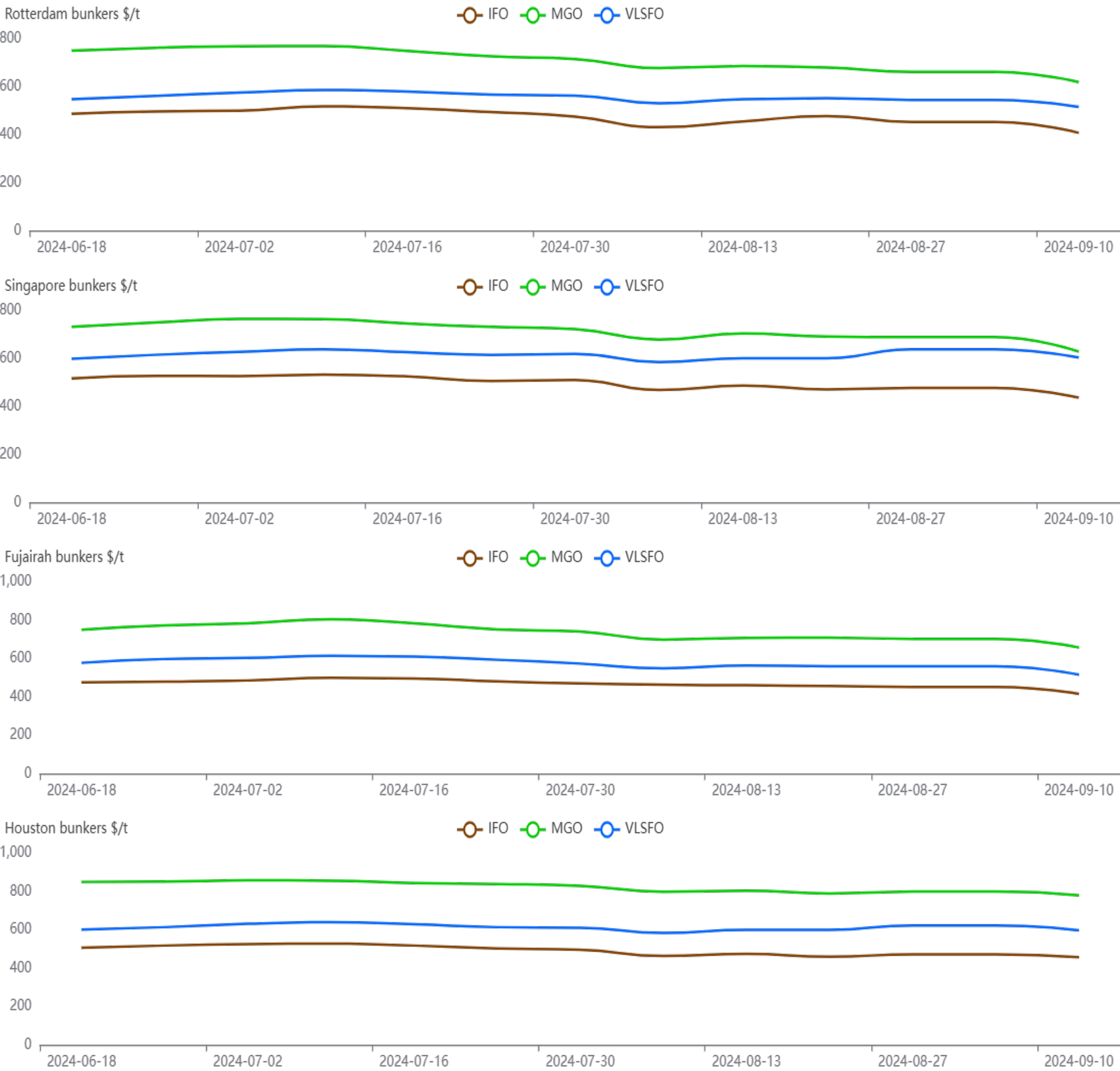
7TC	\$/day	WoW	
Sep-24	12,981.00	-25.0	-0.2 %
Oct-24	13,263.00	-56.0	-0.4 %
Nov-24	13,113.00	-25.0	-0.2 %
Q4 24	13,083.67	-23.0	-0.2 %
Q1 25	10,600.00	-38.0	-0.4 %
Q2 25	12,188.00	0.0	0.0 %
Q3 25	12,150.00	-13.0	-13.0
Q4 25	11,014.00	-121.0	-1.1 %
Cal 25	11,488.00	-43.0	-0.4 %
Cal 26	11,513.00	0.0	0.0 %
Cal 27	11,500.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	609.5	446.5	690.5	163.0	31.0	23.48	66.33
Singapore	604.5	437.0	629.5	167.5	6.0	3.72	46.29
Rotterdam	516.0	408.0	620.0	108.0	16.0	17.39	16.13
Fujairah	516.0	416.5	658.0	99.5	-8.0	-7.44	-3.86
Houston	597.5	457.0	780.0	140.5	-10.0	-6.64	11.95

(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	204.0		9.0	4.62	4.62	-9.86
Maize	210.0		10.0	5.0	12.9	-10.85
Soybeans	214.0		16.0	8.08	3.88	-21.41
Rice	243.0		-3.0	-1.22	0.41	-3.53
Barley	204.0		0.0	0.0	2.0	-11.05
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	66.18	-9.59	-12.66	-8.13	-22.77
Brent	USD/Bbl	69.58	-10.4	-13.0	-7.72	-21.57
Natural Gas	USD/MMBtu	2.23	0.22	10.95	16.75	-17.41
Gasoline	USD/Gal	1.88	-0.41	-17.9	-17.18	-27.69
Heating Oil	USD/Gal	2.06	-0.27	-11.59	-9.65	-33.76
Ethanol	USD/Gal	1.72	-0.11	-6.01	-4.44	-24.23
Naphtha	USD/T	612.46	-46.51	-7.06	-5.0	-9.3
Propane	USD/Gal	0.64	-0.13	-16.88	-12.33	-11.11
Uranium	USD/Lbs	79.55	-2.85	-3.46	-3.69	35.98
Methanol	CNY/T	2350.0	-94.0	-3.85	-4.32	-8.02
TTF Gas	EUR/MWh	35.56	-1.14	-3.11	-10.7	-0.95
UK Gas	GBP/thm	85.38	-2.62	-2.98	-4.96	-2.84
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.06	-0.16	-3.79	1.5	7.12
Coal	USD/T	138.75	-6.45	-4.44	-3.71	-11.23
Steel	CNY/T	2953.0	-100.0	-3.28	-2.86	-21.8
Iron Ore	USD/T	91.76	-6.29	-6.42	-11.77	-21.57
Aluminum	USD/T	2349.0	-193.0	-7.59	4.75	5.86
Lithium	CNY/T	71500.0	-2500.0	-3.38	-10.06	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2520.93	-3.07	-0.12	4.18	29.7
Silver	USD/t.oz	28.55	-1.55	-5.15	3.82	18.42
Platium	USD/t.oz	944.0	-23.0	-2.38	2.38	-1.46
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.1		-0.02	-1.79	0.92	1.85
USD/CNY	7.12		0.0	0.0	0.14	-2.06

第八部分 本周话题 WEEKLY TOPIC



International
Longshoremen's
ASSOCIATION

美国大西洋沿岸港口集装箱进口数量激增

因为担心可能的港口爆发大罢工，在圣诞节日来临前美国零售商提前进口商品。最新数据显示今年七月美国港口的集装箱进口创造了历史纪录，因为国际码头工人协会(International Longshoremen 's Association) ILA和美国海事联盟之间的合同，将于9月30日到期，而双方的谈判仍然陷入僵局，市场对潜在罢工的担忧已经影响了商品进口节奏。一些买家提前要求托运人发货，这直接提高了6月至9月集装箱进入美国的数量。此外，还有一些进口商担忧可能受到未来关税上涨的影响，正在权衡是否提前从中国等地区提前进口一些货物。可以看到进口商正致力于在从美国东岸因到得克萨斯的港口罢工影响之前尽量多进口货物。

相关数据显示，预计美国港口九月份的集装箱吞吐量将达到231万标准箱，较去年同期增长

14%。数据还显示八月份的吞吐量同期上升了20.9%，达到237万标准箱。七月达到232万标准箱，比去年同期增长21%。这是美国港口集装箱进口数量七月份历史数据中最高的一个月。相关数据显示，总体而言估计2024年的吞吐量将达到2490万标准箱，较去年增长12.3%。

国际码头工人协会ILA的一个重要委员会宣布，他们一致支持10月1日的罢工，该协会代表东海岸和墨西哥湾沿岸的码头工人。9月5日，周四，担任工资标准代表的300名国际码头工人协会ILA成员在新泽西结束会议，一致支持工会主席哈罗德·达格特呼吁装卸工在美国大西洋海岸沿岸的集装箱港口罢工。与此同时，美国海事联盟表示，他们致力于在当前协议到期之前恢复与ILA的谈判。并希望ILA重新开启对话并分享其当前的合同要求，以便共同努力达成新协议。全国零售联合会(National Retail Federation)在一份声明中表示，在圣诞假期前的这个关键时刻，美国东海岸集装箱港口需要满负荷运转。

显然罢工将会对全球正常供应链的巨大打击，全球经济会因为可能的罢工面临挑战，在通货膨胀终于下降、美联储准备降息之际，罢工也将会对美国经济的又一次重击。

Fearing a possible extensive scale port strike, American retailers brought forward imports ahead of the Christmas holiday. The latest figures show a record number of container imports at U.S. ports in July, as the contract between the International Longshoremen's Association (ILA) and the American Maritime Union expires on September 30. Talks between the two sides remain deadlocked, and fears of a potential strike have affected the pace of imports. Some buyers have asked shippers for shipments in advance, which has directly boosted the number of containers entering the United States from June to September. In addition, there are some importers concerned that they may be affected by future tariff increases, and are weighing whether to bring forward some goods from China and other regions. Importers can be seen working to bring in as much cargo as possible before the impact of a port strike from Maine to Texas on the East Coast.

U.S. ports are expected to handle 2.31 million TEUs in September, up 14% from the same period last year as data reported. The data also showed throughput in August rose 20.9 percent to 2.37 million TEUs over the same period. It reached 2.32 million TEUs in July, up 21% from the same period last year. This is the highest number of container imports at US ports in the historical data for July. Overall, throughput is estimated to reach 24.9 million TEUs in 2024, up 12.3% from last year.

A key committee of the International Longshoremen's Association ie. ILA, which represents longshoremen along the East Coast and Gulf Coast, announced their unanimous support for the Oct. first strike. On Thursday, September 5, 300 members of the International Longshoremen's Association, representing wage standards, concluded their meeting in New Jersey with unanimous support for union President Harold Daggett's call for stevedores to strike at container ports along the Atlantic coast of the United States. At the same time, the American Maritime Union said it is committed to resuming negotiations with the ILA before the current agreement expires. "We hope that ILA will reopen the dialogue and share its current contractual requirements in order to work together to reach a new agreement." The National Retail Federation said in a statement that U.S. East Coast container ports need to operate at full capacity at this critical time ahead of the Christmas holidays.

Obviously a strike would be a huge blow to the normal global supply chain, the global economy would be challenged by a possible strike, and it would be another blow to the US economy at a time when inflation is finally coming down and the Federal Reserve is preparing to cut interest rates.