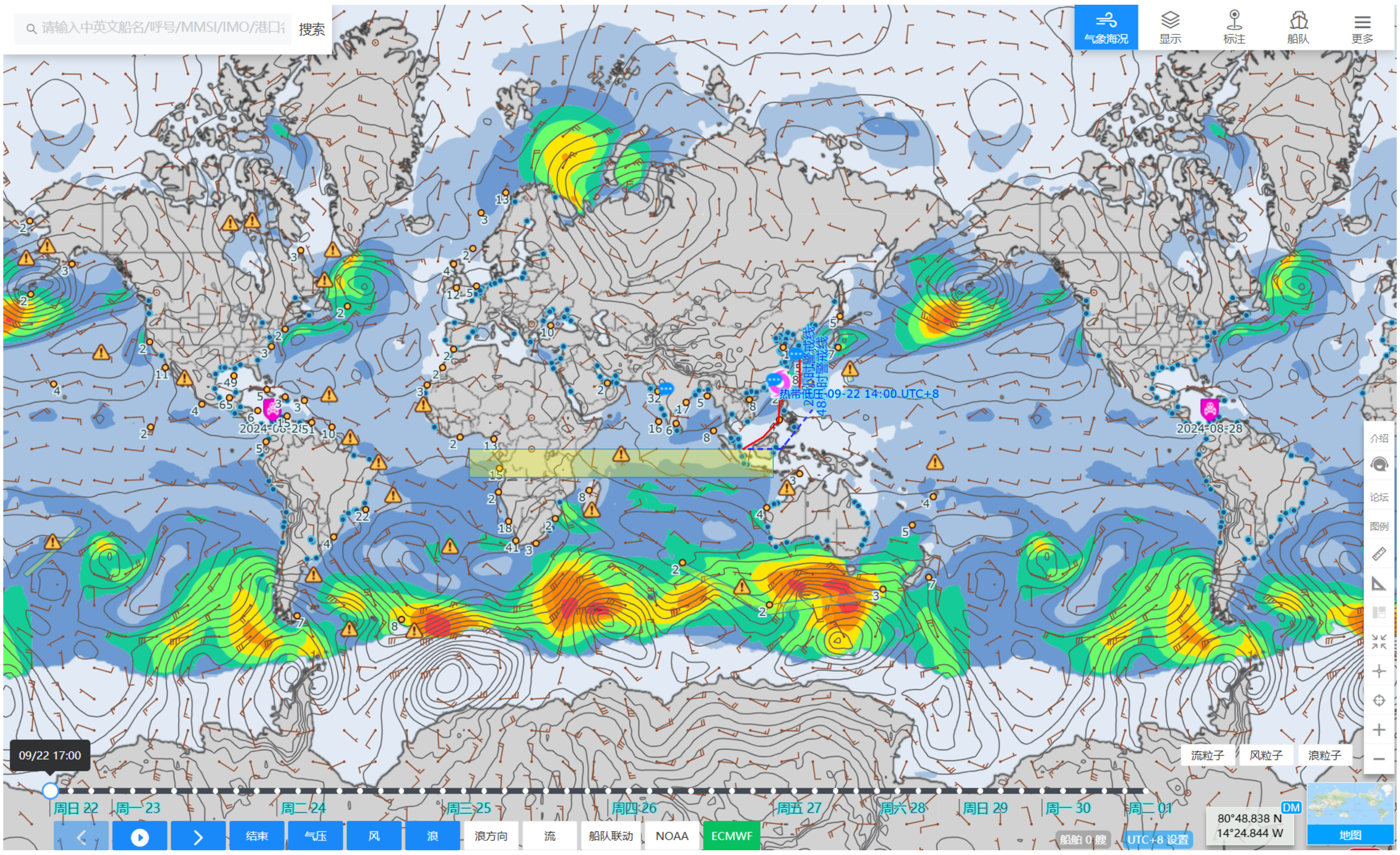
2024年
第38周市场周报

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846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 846 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2米中浪；黄海风力4-5级，相关海域中浪；东海风力4-5级，相关海域中浪；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5-6级，中浪。最近西北太平洋热带气旋活动频繁。The coming week the wind in Bohai Sea stays fresh breeze with moderate seas. Yellow Sea experiences fresh breeze with moderate wave. And China East Sea experience fresh breeze with moderate wave. The wind in the Taiwan Strait is fresh breeze and sea there experience moderate. In most of the South China Sea the wind is strong with moderate sea. The tropic pressure is frequency in north west of Pacific.

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

欧盟军舰和打捞船只成功地将一艘受损的希腊油轮拖到红海的安全水域。这艘163800载重吨的"Sounion"油轮(2006年建造)从它被袭击停航的地方向北拖带到安全锚地，该船在胡塞武装反复袭击后，甲板零星还有明火将近一个月。European Union warships and salvage vessels have successfully towed a damaged Greek oil tanker to the safe waters of the Red Sea. The 163,800 DWT Sounion tanker (built in 2006) was towed north to a safe anchorage from where it had been drifting by the attack, with flames still scattered on its deck for nearly a month after repeated attacks by the Houthis

其它 Others

没有 Nil

备注 Remark

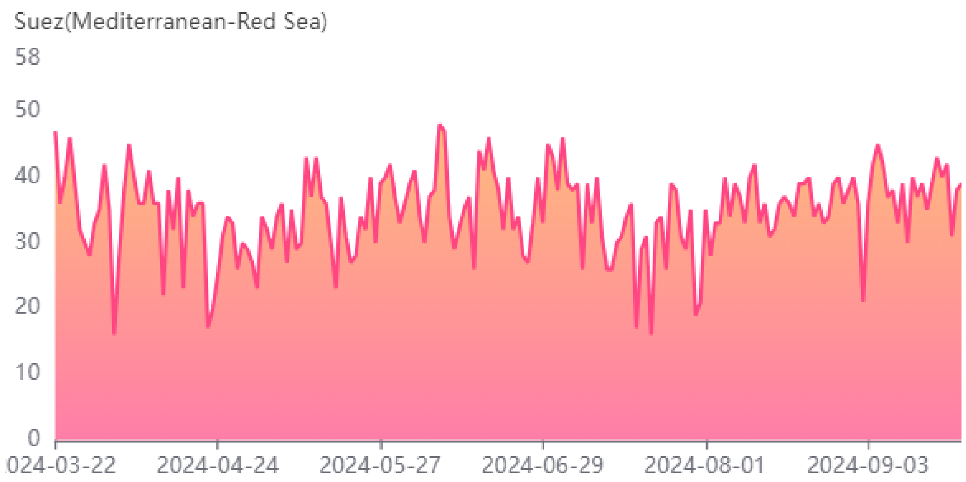
本报告数据截止时间为2024年9月22日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。 The data deadline for this report is Beijing time 17 hours on Sep 22nd of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

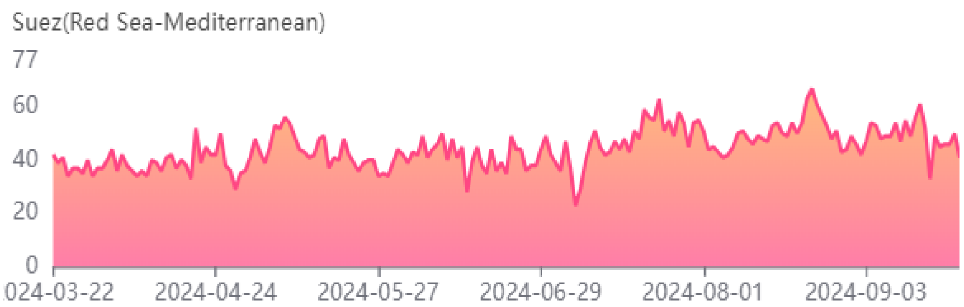
第二部分 航运数据 SHIPPING DATA

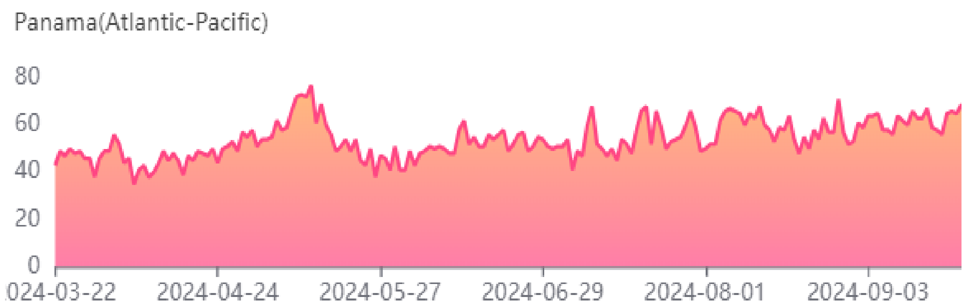
最近一周船舶运河/河口锚地等待数量

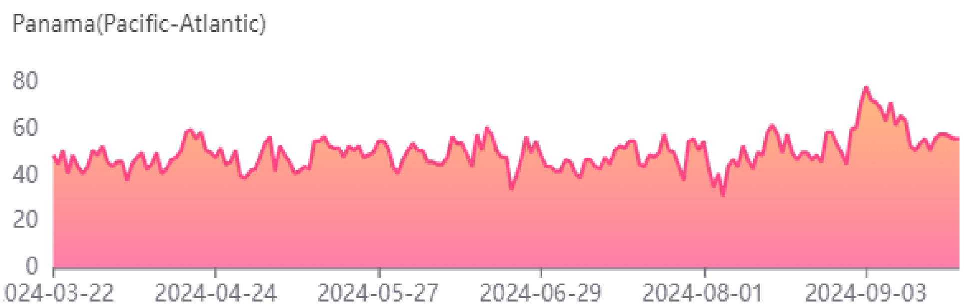
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

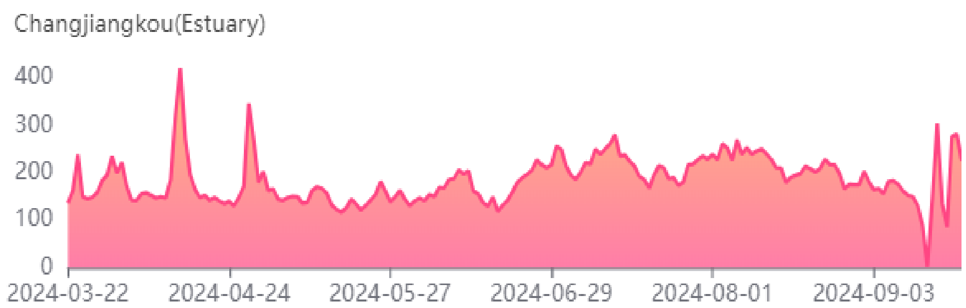
Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	41	1417	-61	-53
Miss.Riv.	5	156	-30	56
CJK	226	4885	593	-1670
Pa.Atlan.	69	1778	4	74
Colum.Riv.	3	134	-2	23
Suez.Med.	39	1082	16	88
Pa.Pac.	56	1733	-30	324
ZJK	51	3184	-340	241

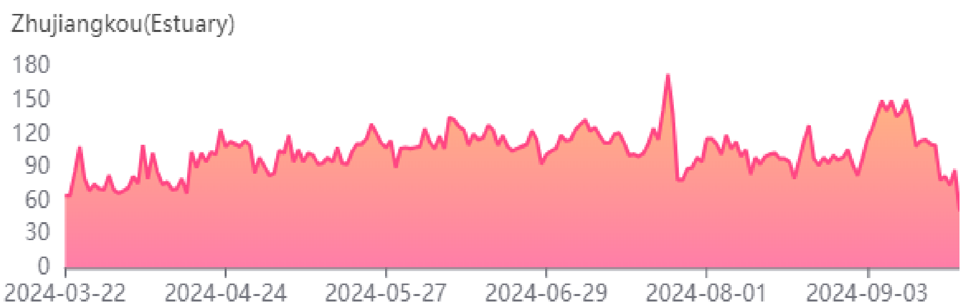


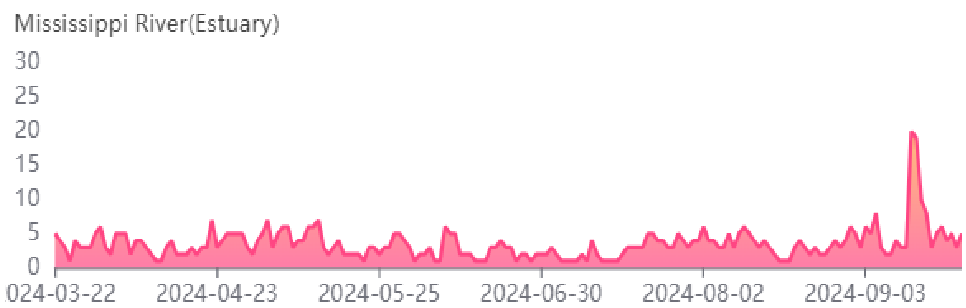


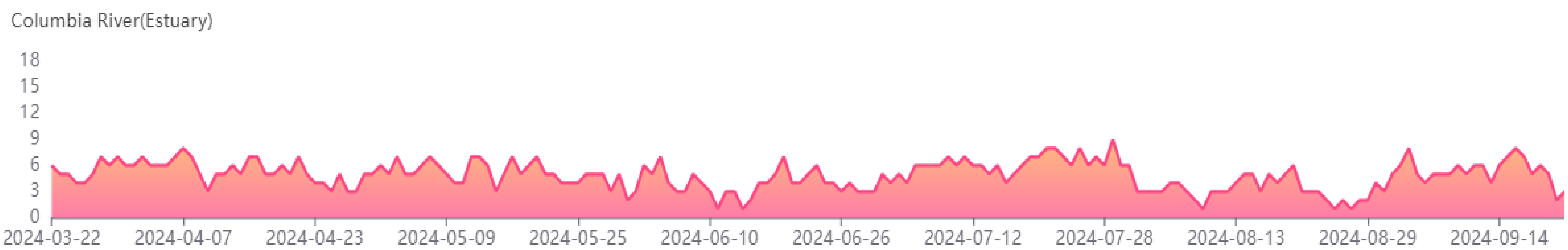










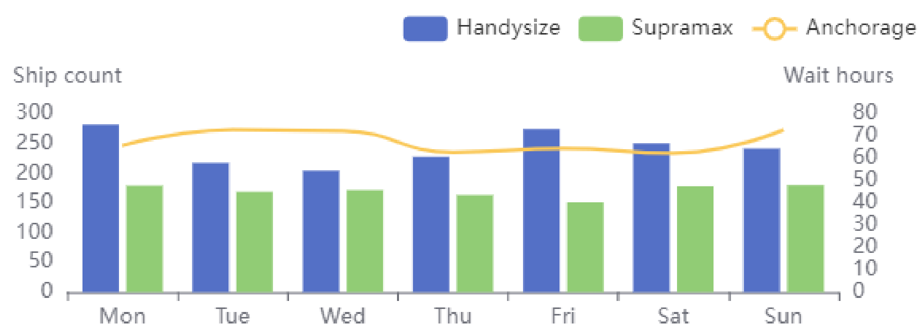


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

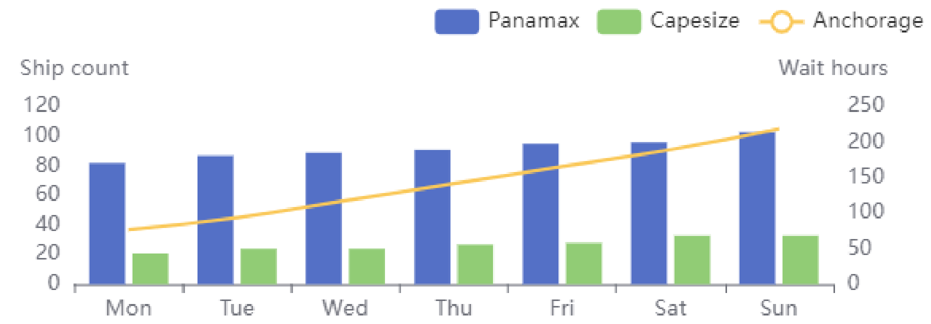
Type	M	T	W	Th	F	Sat	Sun
HDY	283	218	205	228	275	251	242
SMX	180	169	172	164	152	179	181
WT.h.	66	73	72.5	62.9	64.7	62.4	73



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

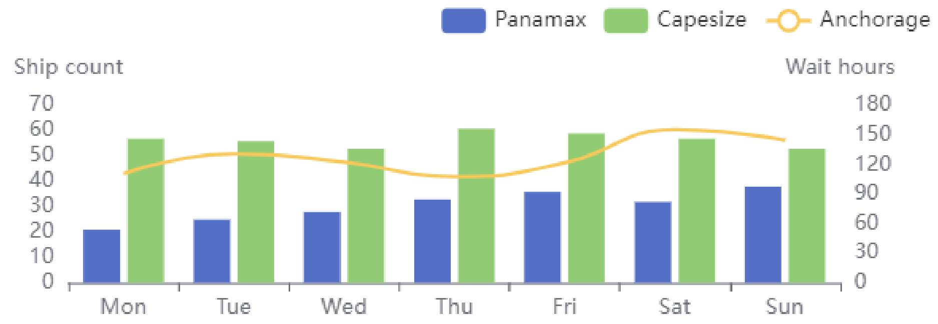
Type	M	T	W	Th	F	Sat	Sun
Pan.	82	87	89	91	95	96	103
Cap	21	24	24	27	28	33	33
WT.h.	76.8	94	118	141.8	165.9	189.9	219



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

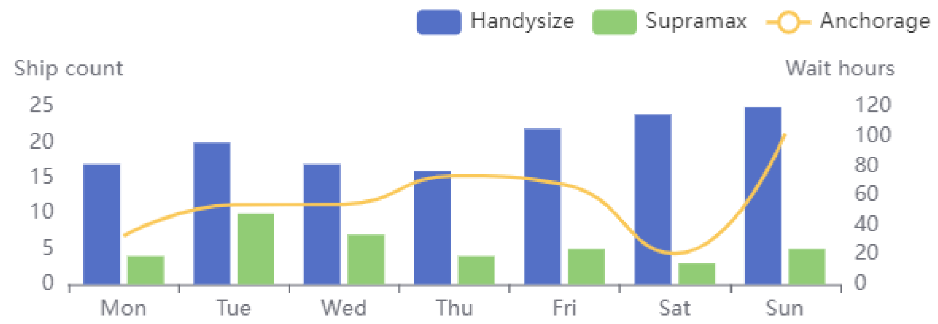
Type	M	T	W	Th	F	Sat	Sun
Pan.	21	25	28	33	36	32	38
Cap	57	56	53	61	59	57	53
WT.h.	111	131.1	122.7	107.8	121.9	155.8	145



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

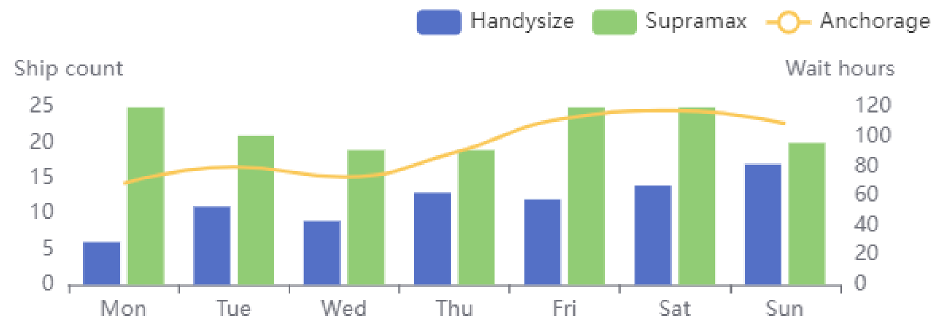
Type	M	T	W	Th	F	Sat	Sun
HDY	17	20	17	16	22	24	25
SMX	4	10	7	4	5	3	5
WT.h.	32.9	53.8	54.3	73.55	67.6	20.9	102



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

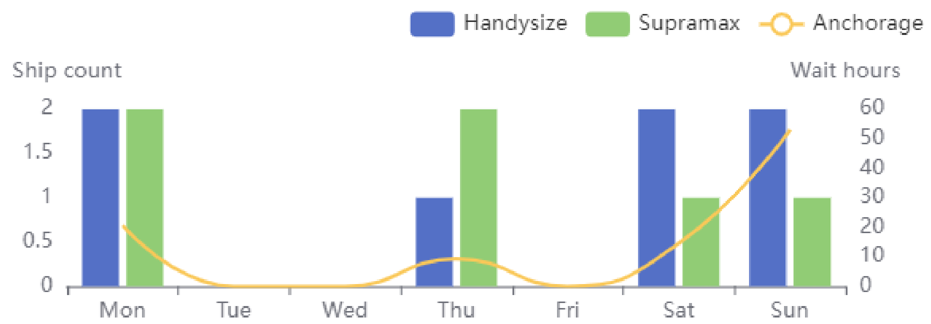
Type	M	T	W	Th	F	Sat	Sun
HDY	6	11	9	13	12	14	17
SMX	25	21	19	19	25	25	20
WT.h.	68.6	79.7	73.1	89.4	112.5	117.9	109



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

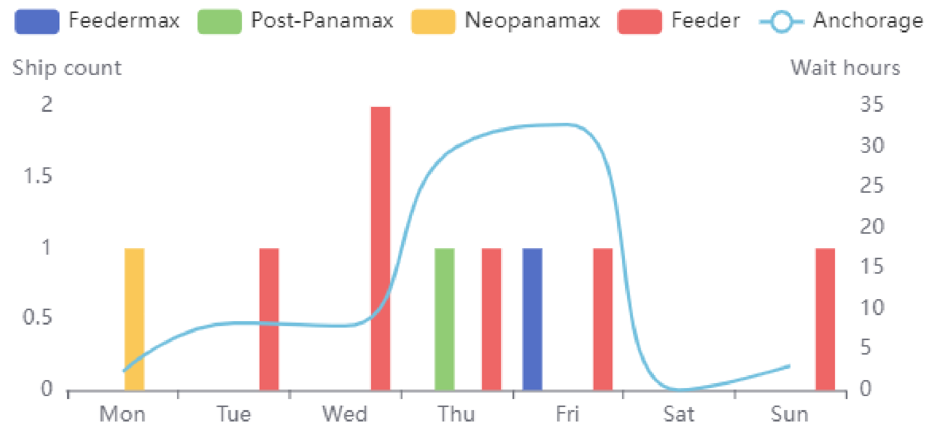
Type	M	T	W	Th	F	Sat	Sun
HDY	2	0	0	1	0	2	2
SMX	2	0	0	2	0	1	1
WT.h.	20.65	0.0	0.0	9.3	0.0	14.6	53



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

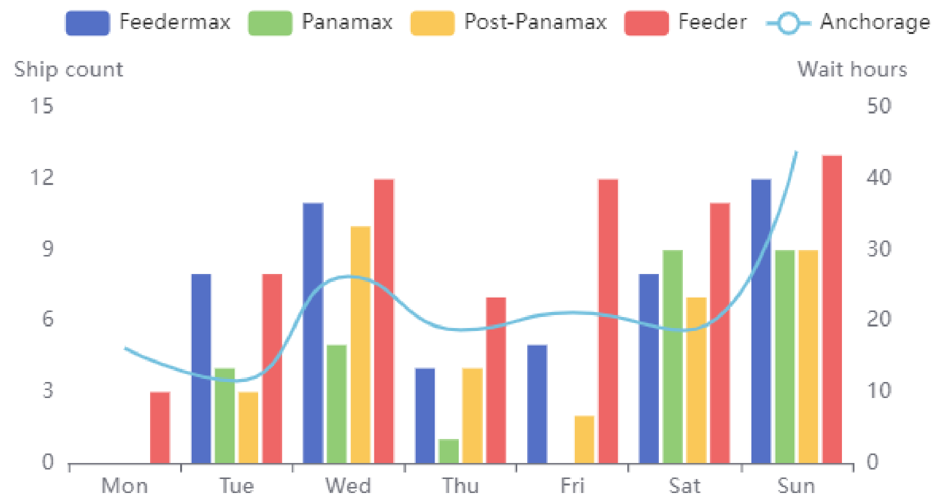
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	1	0	0
Pan.	0	0	0	0	0	0	0
PPx	0	0	0	1	0	0	0
NPx	1	0	0	0	0	0	0
Fd	0	1	2	1	1	0	1
WT.h.	2.3	8.3	7.95	30.05	32.8	0.0	3
Ulcv	0	0	0	0	0	0	0



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

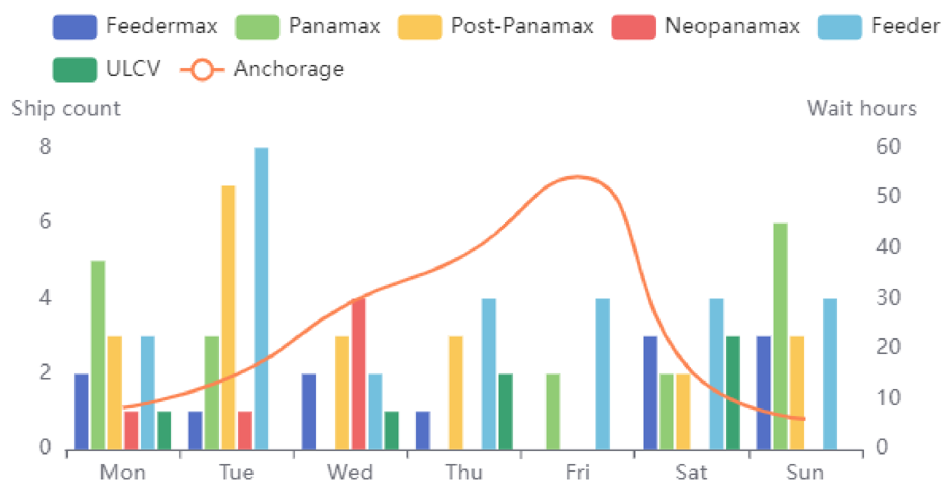
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	8	11	4	5	8	12
Pan.	0	4	5	1	0	9	9
PPx	0	3	10	4	2	7	9
NPx	0	0	0	0	0	0	0
Fd	3	8	12	7	12	11	13
Ulcv	0	0	0	0	0	0	0
WT.h.	16.2	11.6	26.3	18.75	21.2	18.7	44



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

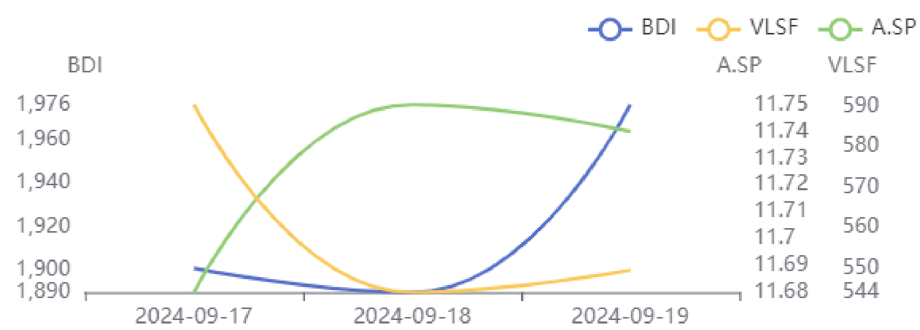
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	1	2	1	0	3	3
Pan.	5	3	0	0	2	2	6
PPx	3	7	3	3	0	2	3
NPx	1	1	4	0	0	0	0
Fd	3	8	2	4	4	4	4
Ulcv	1	0	1	2	0	3	0
WT.h.	8.3	14.9	29.2	38.6	54.25	15.5	6



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

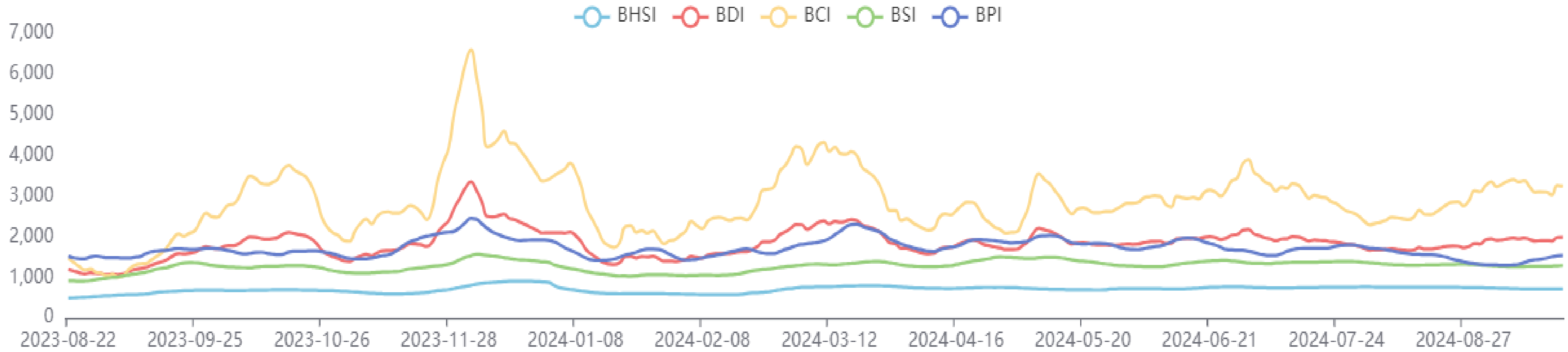
Type	M	T	W	Th	F	Sat	Sun
BDI	1466	1502	1528	1538			
VLSF	590.50	544.00	549.50				
A.SP	11.77	11.68	11.75	11.74	11.59	11.75	



第三部分 航运市场 SHIPPING MARKET

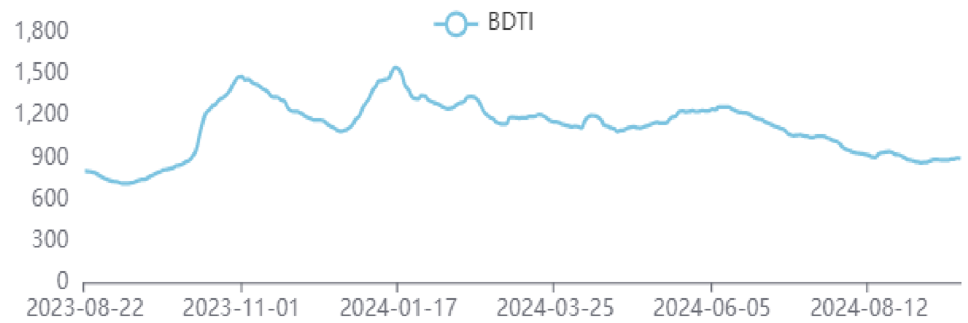
波罗的海干散货指数Baltic Dry Index

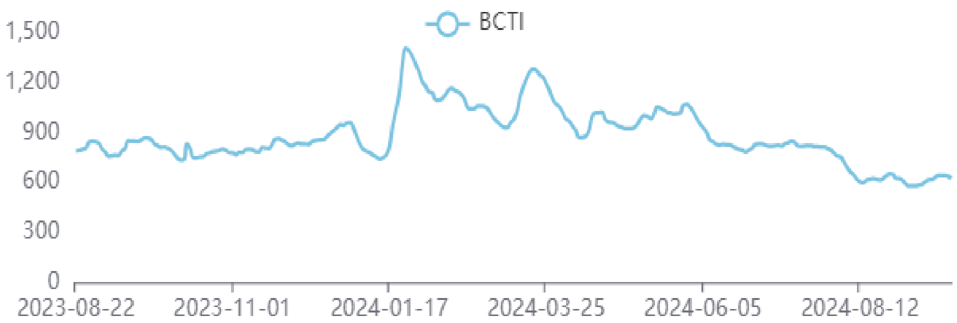
Type	PI	WoW	W%	M%	y%
BDI	1977	87.0	4.6	12.2	24.81
BCI	3235	146.0	4.73	13.47	56.51
BPI	1538	110.0	7.7	8.77	-9.9
BSI	1289	25.0	1.98	-2.2	-2.64
BHSI	707	0.0	0.0	-6.11	6.8

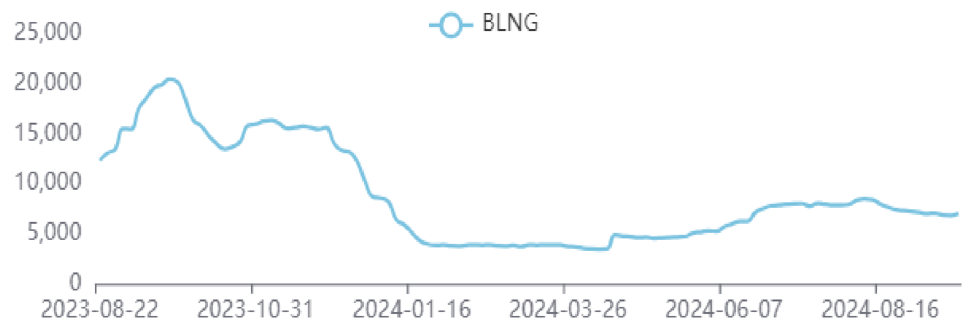


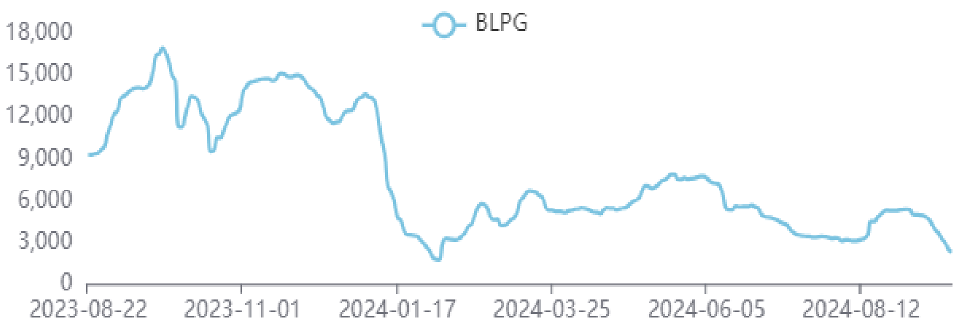
能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	894	11.0	1.25	-2.83	16.41
BCTI	628	-4.0	-0.63	-3.68	-26.72
BLNG	7045	184.0	2.68	-5.05	-65.57
BLPG	2281	-1585.0	-41.0	-56.82	-85.04

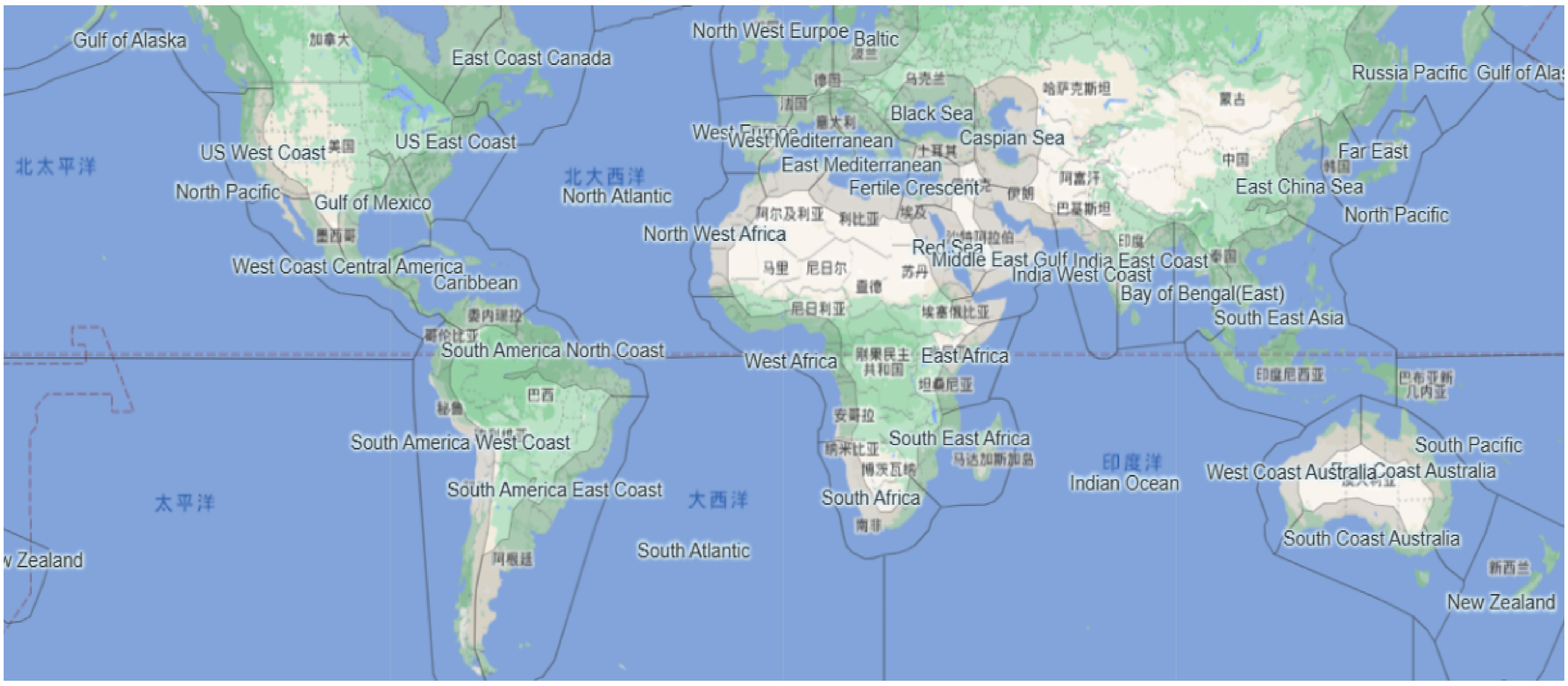








第四部分 运力分布 SUPPLY DISTRIBUTION

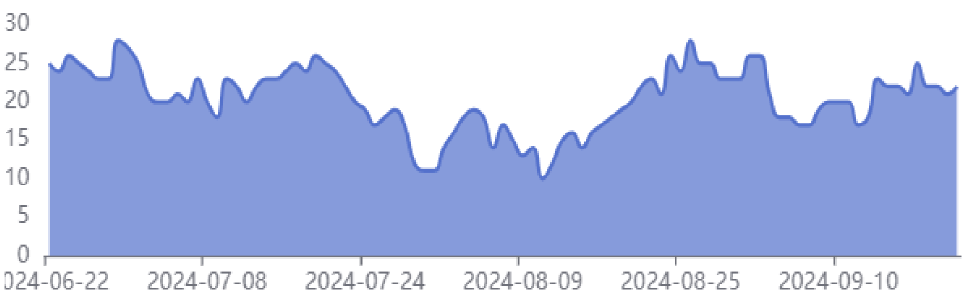


好望角型散货船 Capesize

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.

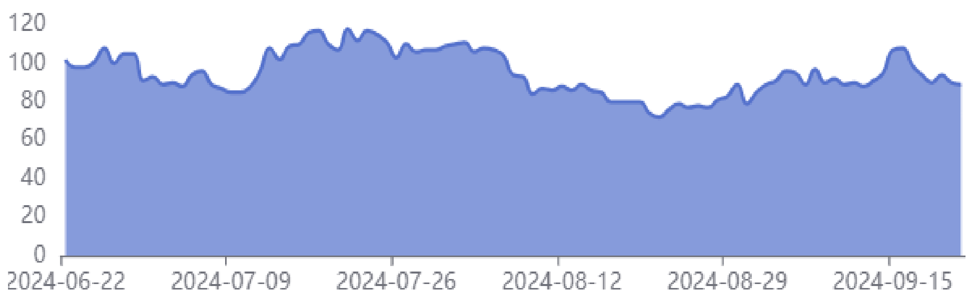
Type	M	T	W	Th	F	Sat	Sun
Cape	22	21	25	22	22	21	22



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.

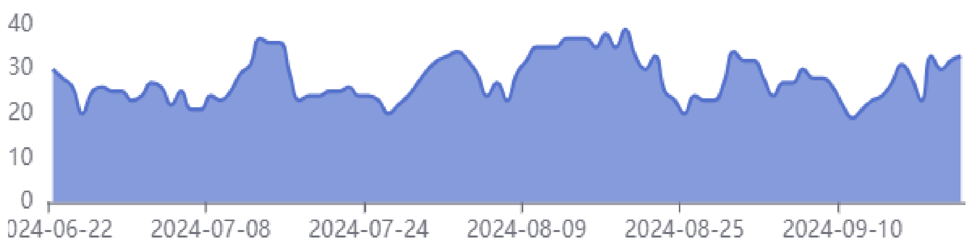
Type	M	T	W	Th	F	Sat	Sun
Cape	108	99	94	90	94	90	89



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	31	28	23	33	30	32	33

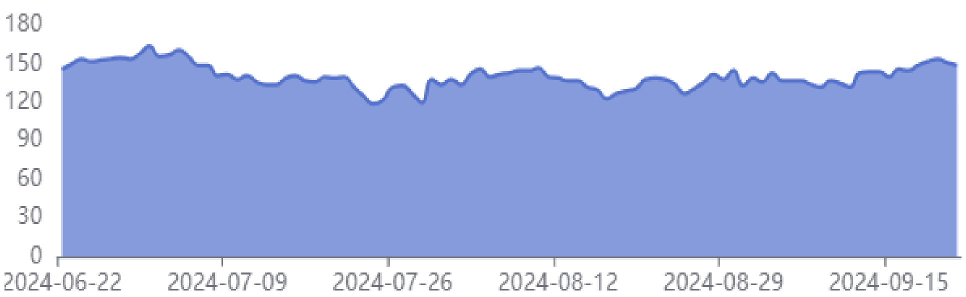


巴拿马型散货船 PANAMAX

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.

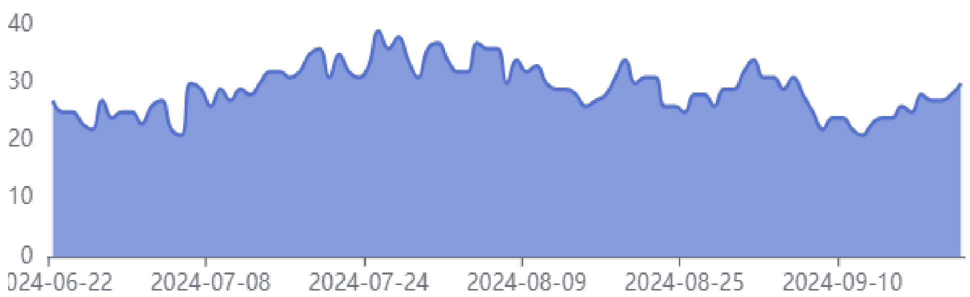
Type	M	T	W	Th	F	Sat	Sun
Pan.	146	145	149	152	154	151	149



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.

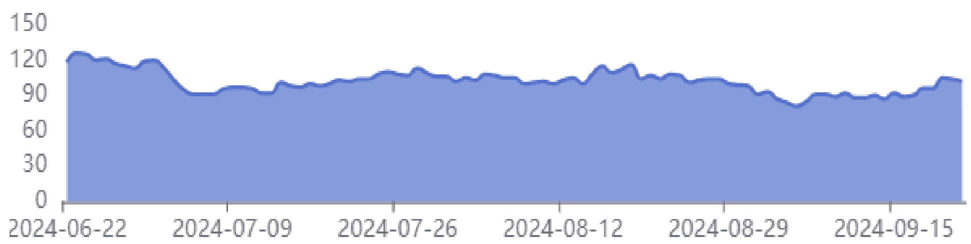
Type	M	T	W	Th	F	Sat	Sun
Pan.	21	23	18	17	19	23	22



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	90	96	96	105	104	102

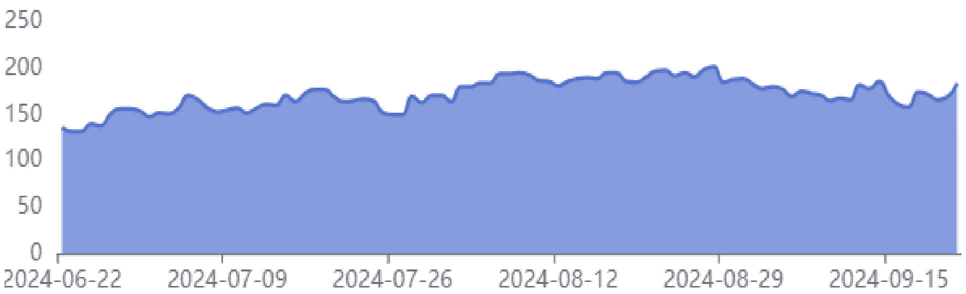


超大灵便型散货 SUPRAMAX

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.

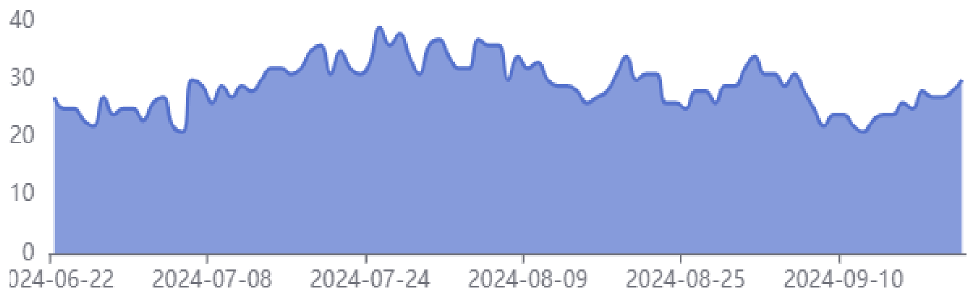
Type	M	T	W	Th	F	Sat	Sun
SMX	161	158	174	172	166	169	184



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.

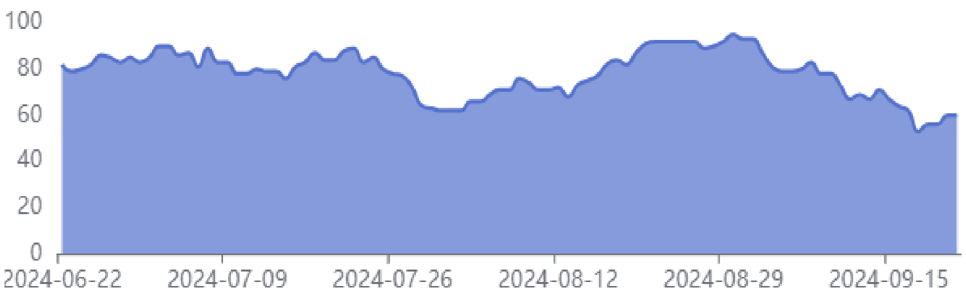
Type	M	T	W	Th	F	Sat	Sun
SMX	26	25	28	27	27	28	30



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.

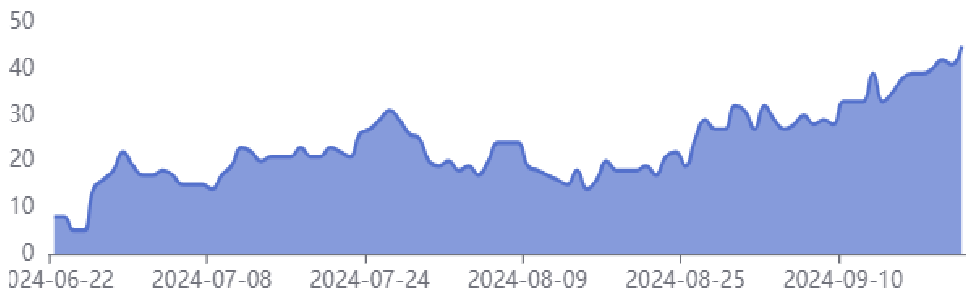
Type	M	T	W	Th	F	Sat	Sun
SMX	38	39	39	40	42	41	45



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.

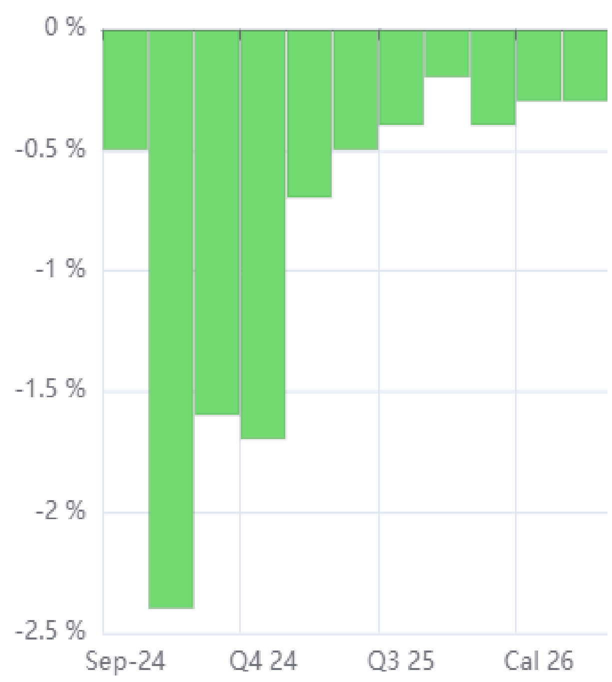
Type	M	T	W	Th	F	Sat	Sun
SMX	64	62	53	56	56	60	60

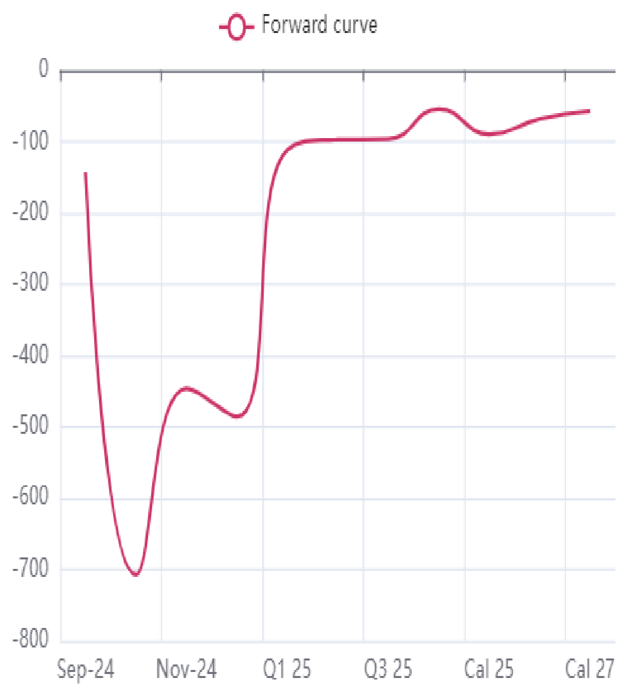


第五部分 远期运价协议 FFA

好望角型散货船Capesize

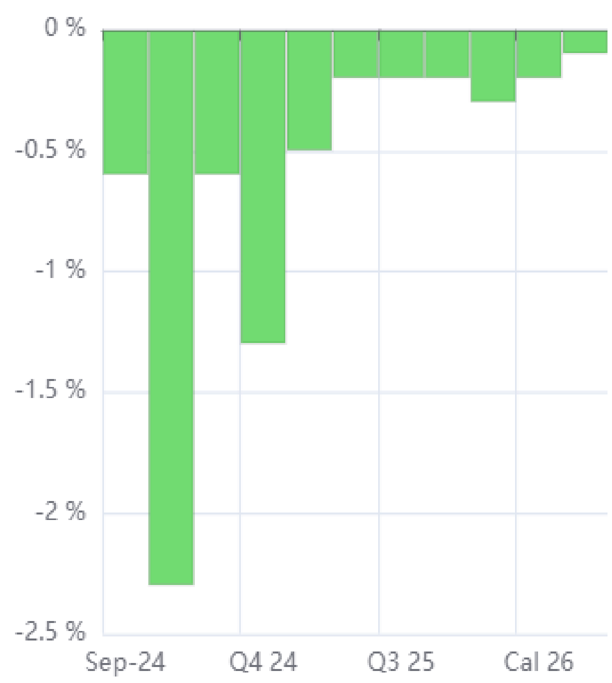
5TC	$/day	WoW	
Sep-24	27,275.00	-143.0	-0.5 %
Oct-24	29,343.00	-707.0	-2.4 %
Nov-24	26,854.00	-446.0	-1.6 %
Q4 24	27,515.67	-485.67	-1.7 %
Q1 25	16,293.00	-111.0	-0.7 %
Q2 25	20,264.00	-97.0	-0.5 %
Q3 25	24,625.00	-96.0	-0.4 %
Q4 25	24,632.00	-54.0	-0.2 %
Cal 25	21,453.50	-89.5	-0.4 %
Cal 26	20,875.25	-67.75	-0.3 %
Cal 27	20,211.00	-57.0	-0.3 %

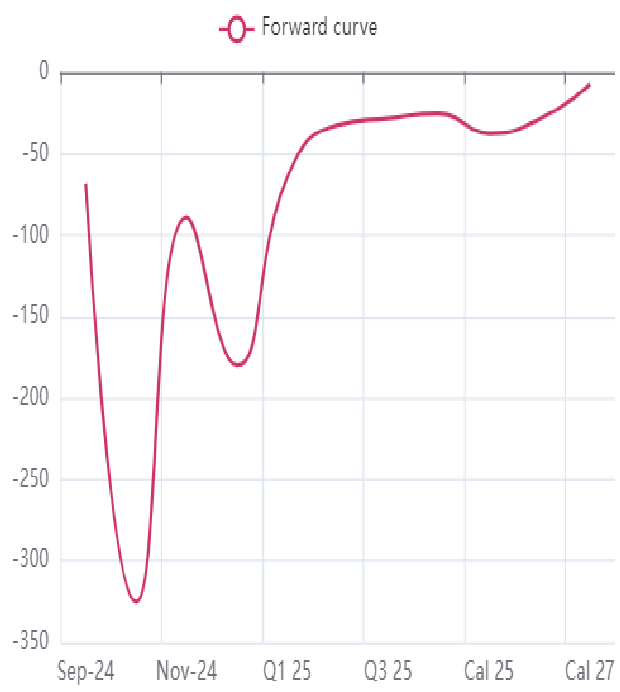




巴拿马型散货船Panamax

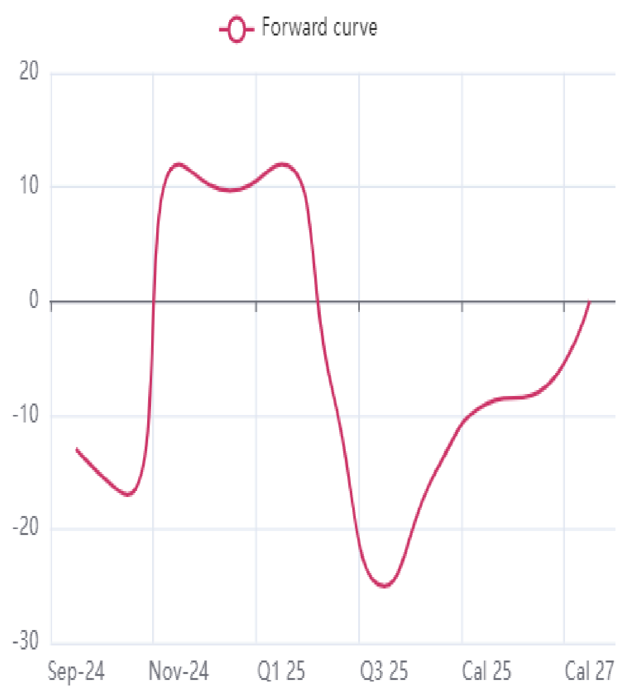
4TC	$/day	WoW	
Sep-24	11,707.00	-68.0	-0.6 %
Oct-24	13,696.00	-325.0	-2.3 %
Nov-24	14,007.00	-89.0	-0.6 %
Q4 24	13,810.67	-179.67	-1.3 %
Q1 25	11,636.00	-64.0	-0.5 %
Q2 25	13,264.00	-32.0	-0.2 %
Q3 25	13,136.00	-28.0	-0.2 %
Q4 25	12,736.00	-25.0	-0.2 %
Cal 25	12,693.00	-37.25	-0.3 %
Cal 26	12,482.25	-28.5	-0.2 %
Cal 27	12,386.00	-7.0	-0.1 %





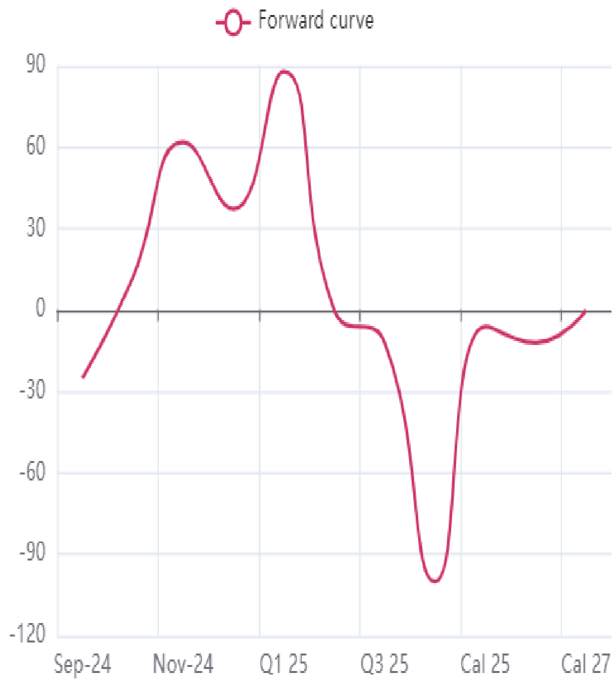
超大灵便型散货船Supramax

10TC	$/day	WoW	
Sep-24	14,154.00	-13.0	-0.1 %
Oct-24	14,783.00	-17.0	-0.1 %
Nov-24	14,725.00	12.0	0.1 %
Q4 24	14,533.33	9.67	0.1 %
Q1 25	11,958.00	12.0	0.1 %
Q2 25	13,421.00	-8.0	-0.1 %
Q3 25	13,288.00	-25.0	-0.2 %
Q4 25	12,649.00	-15.0	-0.1 %
12,829.00	Cal 25	-9.0	-0.1 %
Cal 26	12,542.00	-8.0	-0.1 %
Cal 27	12,342.00	0.0	0.0 %



灵便型散货船Handysize

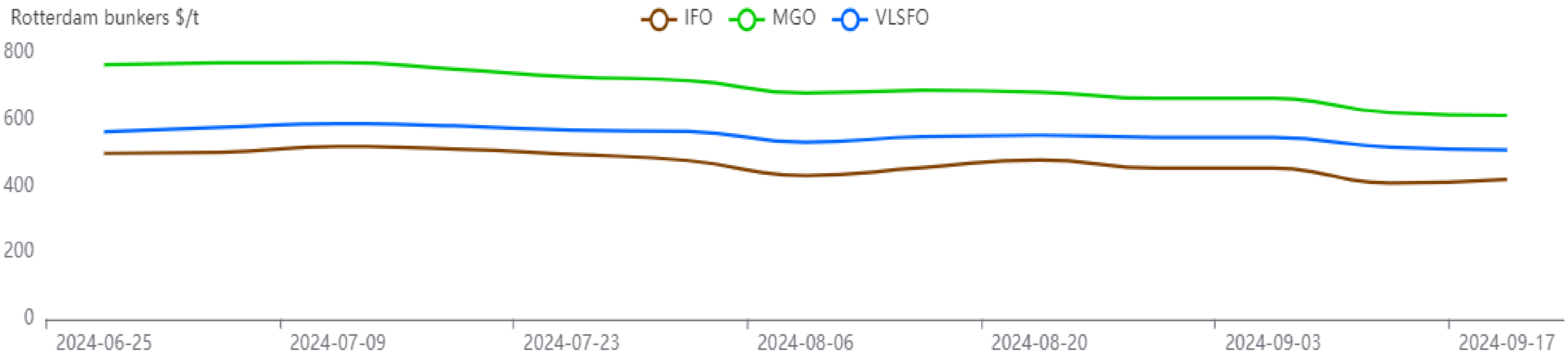
7TC	$/day	WoW	
Sep-24	13,013.00	-25.0	-0.2 %
Oct-24	13,550.00	12.0	0.1 %
Nov-24	13,425.00	62.0	0.5 %
Q4 24	13,362.67	37.33	0.3 %
Q1 25	10,838.00	88.0	0.8 %
Q2 25	12,350.00	0.0	0.0 %
Q3 25	12,238.00	-12.0	-12.0
Q4 25	12,026.00	-100.0	-0.8 %
Cal 25	11,863.00	-6.0	-0.1 %
Cal 26	11,563.00	-12.0	-0.1 %
Cal 27	11,500.00	0.0	0.0 %

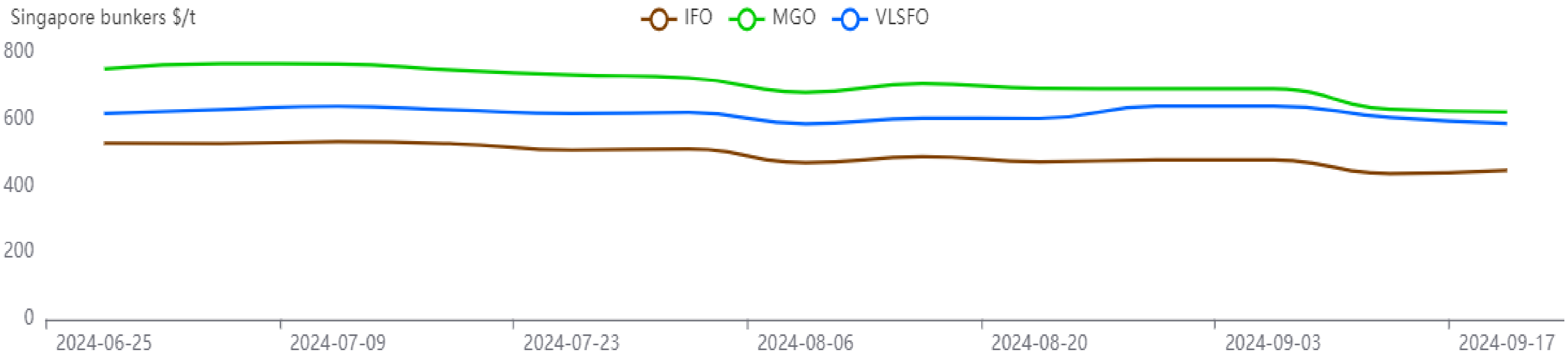


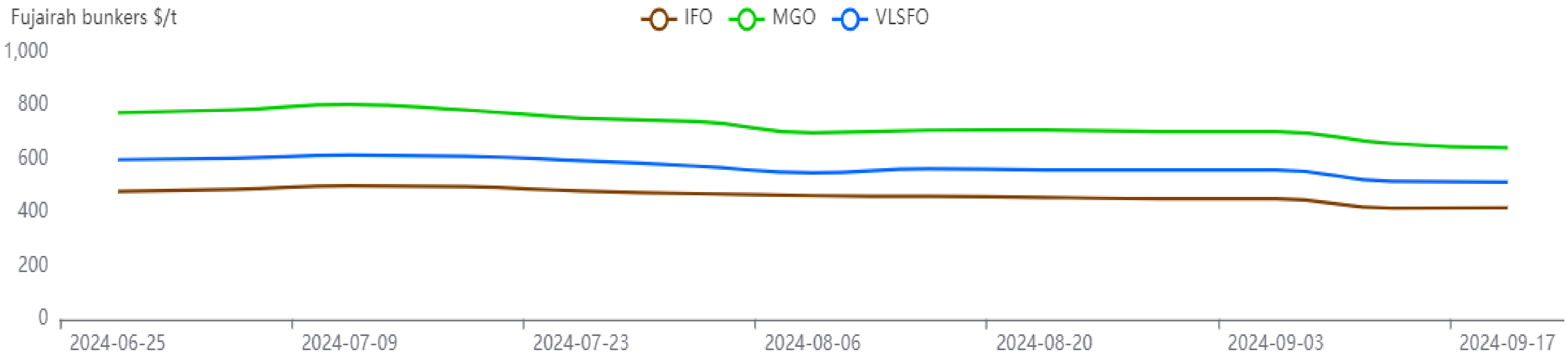
第六部分 燃油价格 BUNKER PRICE

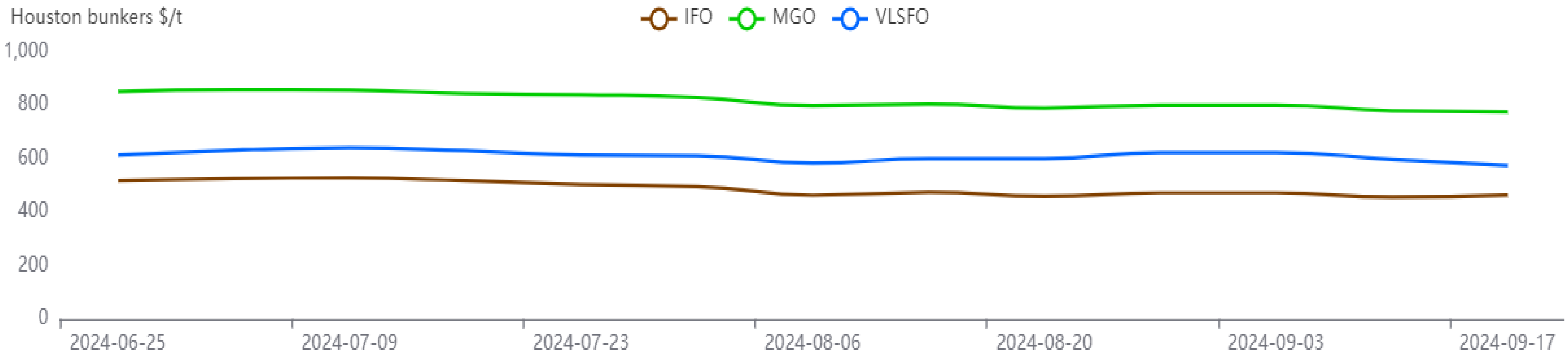
MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	593.5	465.0	671.5	128.5	-34.5	-21.17	15.77
Singapore	587.0	447.0	621.5	140.0	-27.5	-16.42	8.11
Rotterdam	507.5	419.0	611.0	88.5	-19.5	-18.06	18.79
Fujairah	513.5	417.5	642.0	96.0	-3.5	-3.52	-6.8
Houston	574.5	464.0	774.5	110.5	-30.0	-21.35	-21.63

(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	206.0		2.0	0.98	4.04	-10.43
Maize	211.0		1.0	0.48	6.03	-13.17
Soybeans	212.0		-2.0	-0.93	8.16	-22.06
Rice	242.0		-1.0	-0.41	-1.22	-2.81
Barley	214.0		10.0	4.9	4.39	-6.96
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	70.63	4.45	6.72	-7.03	-18.75
Brent	USD/Bbl	73.17	3.59	5.16	-7.47	-19.33
Natural Gas	USD/MMBtu	2.33	0.1	4.48	9.91	-8.63
Gasoline	USD/Gal	1.98	0.1	5.32	-13.91	-25.56
Heating Oil	USD/Gal	2.13	0.07	3.4	-7.79	-35.45
Ethanol	USD/Gal	1.68	-0.04	-2.33	-7.18	-25.99
Naphtha	USD/T	624.81	12.35	2.02	-5.04	-8.95
Propane	USD/Gal	0.66	0.02	3.13	-13.16	-12.0
Uranium	USD/Lbs	79.5	-0.05	-0.06	-2.09	30.86
Methanol	CNY/T	2315.0	-35.0	-1.49	-3.62	-8.28
TTF Gas	EUR/MWh	35.25	-0.31	-0.87	-11.43	-1.78
UK Gas	GBp/thm	84.31	-1.07	-1.25	-12.95	-5.27
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.19	0.13	3.2	0.72	11.73
Coal	USD/T	139.65	0.9	0.65	-4.84	-10.65
Steel	CNY/T	3037.0	84.0	2.84	-0.56	-18.1
Iron Ore	USD/T	91.98	0.22	0.24	-5.96	-21.05
Aluminum	USD/T	2497.0	148.0	6.3	3.87	14.33
Lithium	CNY/T	72500.0	1000.0	1.4	-1.36	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2569.28	48.35	1.92	2.67	33.26
Silver	USD/t.oz	30.53	1.98	6.94	5.28	32.05
Platium	USD/t.oz	981.0	37.0	3.92	3.37	8.84
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.11		0.01	0.91	0.91	3.74
USD/CNY	7.1		-0.02	-0.28	-0.56	-2.74

第八部分 本周话题 WEEKLY TOPIC

油轮海运市场的波动迷局

最近看到全球航运股票市场出现连续的向下调整态势，几乎又重新回到去年底低位水平，特别是油轮航运上市公司的股票最近是持续急速下探，中远海能和招商轮船（VLCC是该上市公司主力船型）最近一周一直跟随欧美航运市场下跌，这与如火如荼的新造船市场好像形成不太和谐局面。最近煎熬的暑假期间，油轮市场经历了一波十分矛盾的现象。

油轮航运市场在暑假经历的持续下降过程，当前表现为底部盘整回升态势，在奥斯陆上市的亨特集团(Hunter Group)透露，旗下长期租入的两艘超大型油轮正在经历艰难日子，这家投资公司表示，他们租入的两艘VLCC现货价格平均为每天32,700美元，而三年期租用这两艘船只的成本为每天51,750美元，这样每30天两艘船就要损失114.3万美金。

由于对全球经济状况的担忧，欧佩克+主要产油国的增产计划又将推迟两个月。包括沙特阿拉伯和俄罗斯在内的八个成员国表示，分阶段增产要到12月才会开始，但可能会再次推迟。

而油轮船舶价格一直表现坚挺，研究人员表示，随着原油货运市场触底好转，油轮卖家愿意坚持等待更高的油轮出售价格。油轮上市公司股东也对未来市场表现出信心，比如在纽约上市的Scorpio Tankers继续将股票回购作为资本配置的首要任务，在过去6周斥资1.75亿美元回购了242万股股票，以求缩小与资产净值的差距。这家由伊曼纽尔·劳伦(Emanuele lauro)领导的公司在9月初收盘后的最新消息中表示已经以72.45美元的均价买入了该股。这家成品油油轮巨头在8月份公布第二季度业绩时披露，已将授权扩大4亿美元回购资金用完了将近一半。这无疑能看出该船东对未来油轮市场充满信心。

近期，油轮市场分析师表示，可能来自于季节性因素对租船费率影响而导致投资者对丹麦成品油油轮Torm股票的抛售显得过度和缺乏远见。

由于10月份炼油厂重新开业需要船只，运费已经开始飙升，行业数据显示，从上周开始时，最大油轮的费率达到每天34200美元，比之前低迷期上涨了近26%。 油轮顾问乔纳森•斯陶博(Jonathan Staubo)认为，油轮盈利状况良好的基本面一直存在。Fearnleys顾问Jonathan Staubo认为，从基本的供需平衡来看，今年夏季油轮运价太低，并表示今年晚些时候盈利回升的所有条件都将具备，吨英里数将达到历史新高水平。

在非洲，原油产量的增长速度将超过非洲大陆的炼油能力，这意味着原油将被从非洲出口。在南美，炼油行业的进步未能跟上该大陆不断增长的石油产量的发展，原油油轮行业将会受益。特别是在阿根廷、圭亚那和苏里南原油供应增长的背景下，南美洲面临需求挑战。

Recently, we have seen a continuous downward adjustment in the global shipping stock market, almost returning to the low level at the end of last year, especially the stocks of listed oil tanker shipping companies have continued to plummet rapidly recently, and COSCO Shipping Energy Transportation and China Merchants Energy Shipping (VLCC is the main type of the listed company) have been following the European and American shipping market decline in the latest week. This does not seem to be in harmony with the booming new shipbuilding market. The tanker market experienced a very contradictory phenomenon during the recent tortuous summer holidays.

The tanker shipping market is showing a bottom consolidation after a sustained decline over the summer, with Oslo-listed Hunter Group revealing that two of its long-term charters of very large tankers are having a tough time, the investment firm said. The spot price of the two VLCCS they chartered averaged $32,700 per day, while the cost of chartering the two vessels for three years was $51,750 per day, resulting in a loss of $1.143 million for each vessel every 30 days.

The planned increase in output by Opec + major oil producers will be delayed by another two months due to concerns about the state of the global economy. The eight members, including Saudi Arabia and Russia, said the phased increase would not begin until December but could be delayed again.

While tanker ship prices have been strong, researchers said that as the crude oil freight market bottomed out, tanker sellers are willing to hold out for higher tanker prices. Shareholders in listed tanker companies are also showing confidence in future markets, with New York-listed Scorpio Tankers continuing to make share buybacks a top priority in capital allocation, spending $175m to buy back 2.24m shares in the past six weeks in an effort to close the gap to net asset value. The firm, led by Emanuele lauro, said in its latest update after the close in early September that it had bought the stock at an average price of $72.45. The product tanker giant disclosed in August, when it reported second-quarter results, that it had used up nearly half of its authorized $400 million buyback fund. This undoubtedly shows that the shipowner has full confidence in the future tanker market.

Recently, tanker market analysts said that the selling of Danish oil products tanker Torm shares, possibly due to seasonal factors affecting charter rates, seems excessive and shortsighted.

With vessels needed for refineries to reopen in October, freight rates have begun to soar, with rates for the largest tankers hitting $34,200 a day from last week, up nearly 26 percent from the previous downturn, according to industry data.

Jonathan Staubo, a tanker consultant, believes that the fundamentals for tanker profitability have always been there. Fearnleys consultant Jonathan Staubo believes tanker rates were too low this summer in terms of the fundamental supply and demand balance and says all the conditions will be in place for an earnings pick-up later this year, with ton miles reaching record levels.

In Africa, crude oil production will grow faster than the continent's refining capacity, which means crude oil will be exported from Africa. In South America, where refining advancements have failed to keep pace with the continent's growing oil production, the crude oil tanker industry stands to benefit. And South America faces demand challenges on the back of crude oil supply growth in Argentina, Guyana and Suriname.