



2024年 第39周市场周报

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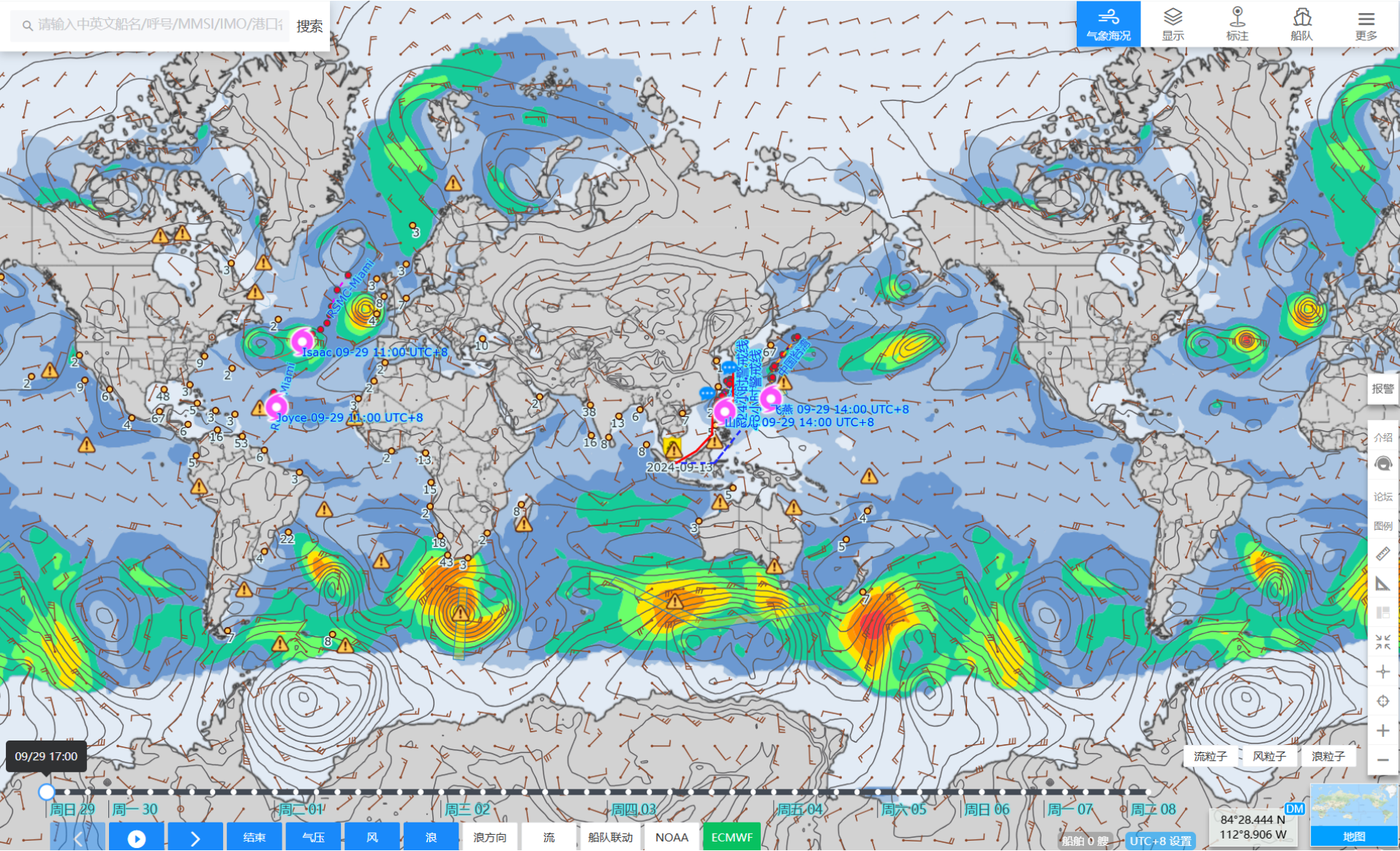
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本周话题 WEEKLY TOPIC

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857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 857 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从8级风减弱到5级，相关海域2米中浪；黄海风力从8级减弱到5级，相关海域中浪；东海风力8级风减弱到6级，相关海域大浪；台湾海峡风力将经历9级风，台湾海峡大浪；南海大部海域风力可达8级，大浪。太平洋刚刚形成的第18号台风‘山陀儿’正缓慢向台湾东部移动。The coming week the wind in Bohai Sea will experience from gale to fresh breeze with moderate seas. So does Yellow Sea. And China East Sea will experience gale too with rough sea there. The wind in the Taiwan Strait will happen strong gale with very rough wave. In most of the South China Sea the wind is strong with rough sea as well. The 18th typhoon ‘KRATHON’ in Pacific this year is moving toward to the east of Taiwan slowly.

海盗事件 Piracy

9月13号，新加坡海峡，一艘正在航行的散货船上的值班加油在集控室发现了五名持枪的蒙面劫匪。警报拉响，船员集合，事故报告给VTIS，当地代理和DPA。对机舱进行了搜查，没有发现海盗或丢失物品。在一艘海军巡逻舰的护送下，该船抵达了引航站，海岸警卫队在那里进行了搜索。13.09.2024: 1620 UTC: Posn: 01:04.2N – 103:37.0E, Singapore Straits. Duty oiler onboard a bulk carrier underway spotted five masked robbers armed with weapons in the engine room. Alarm raised, crew mustered and incident reported to VTIS, the local agent and the DPA. A search of the engine room was conducted. No robbers or missing items identified. The ship was escorted by a naval patrol vessel to the pilot station, where the coast guard conducted a search.

海上事件 Marine Incidents

今年夏天，由于引航员和船长缺乏沟通和注意力集中，一艘悬挂圣基茨和尼维斯国旗的3000载重吨普通货船Baltic Arrow号(2002年建造)在从拉脱维亚前往英国维斯贝克的运输木材途中，因引航员操作不当致使船舶打横困在英格兰的内河里。This summer, due to a lack of communication and concentration between the pilot and the captain, the St. Kitts and Nevis-flagged 3,000 deadweight ton general cargo ship Baltic Arrow (built in 2002), en route from Latvia to Wisbeck, England, was stranded in the English river due to improper pilot maneuvers.

其它 Others

没有 Nil

备注 Remark

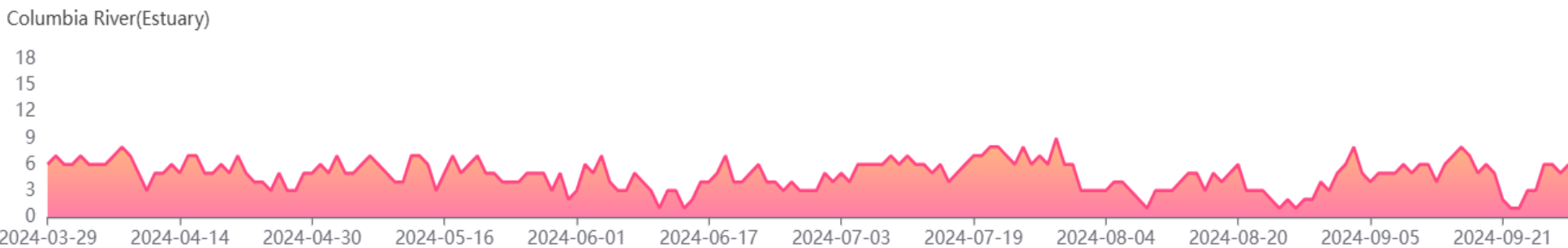
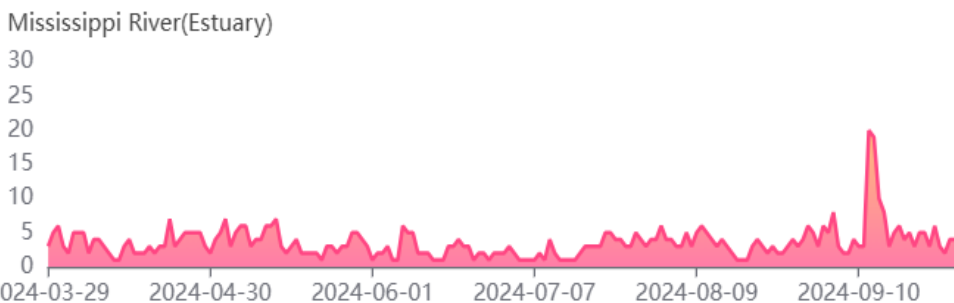
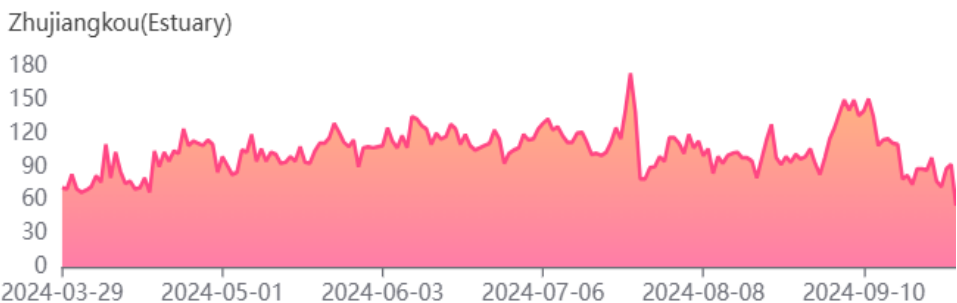
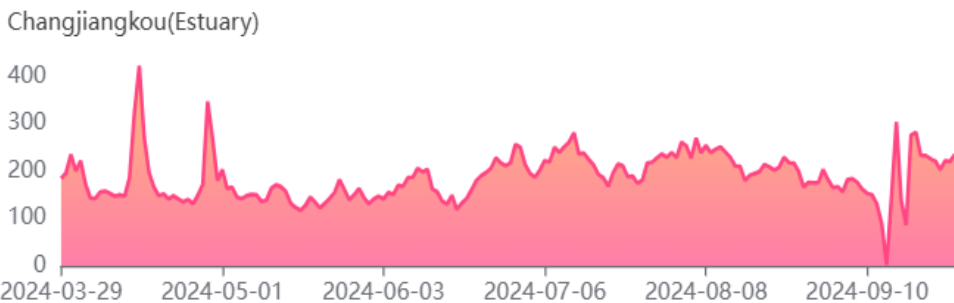
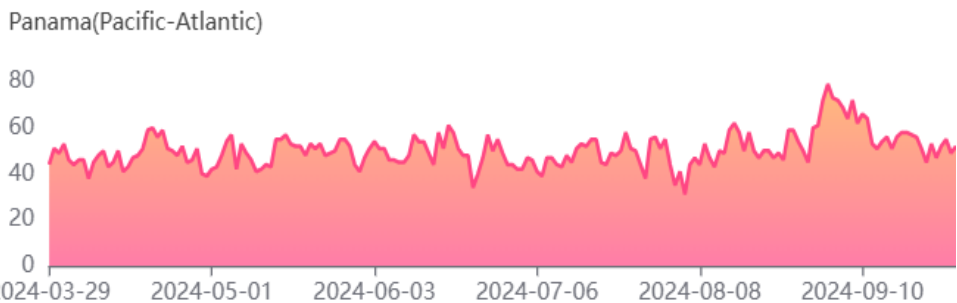
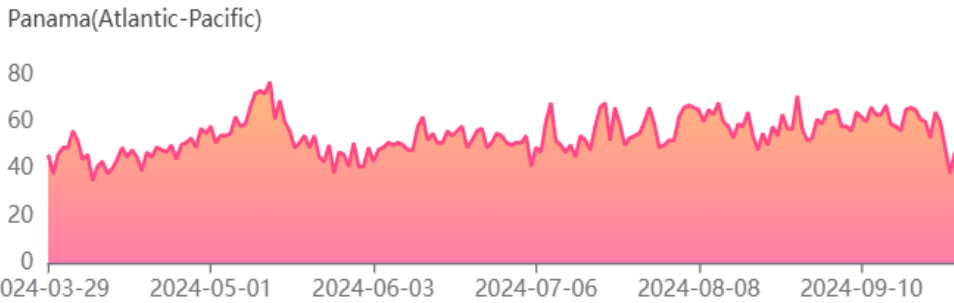
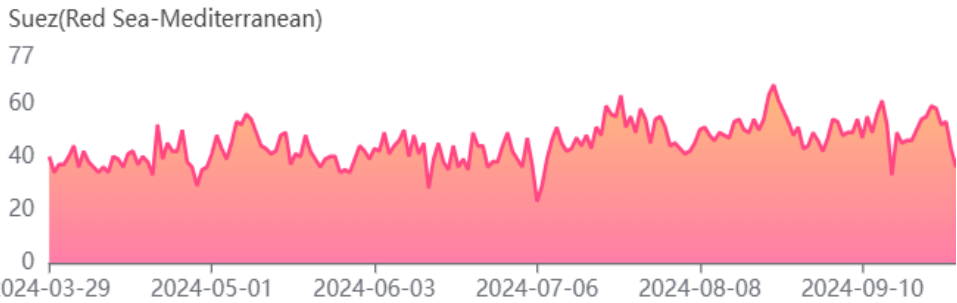
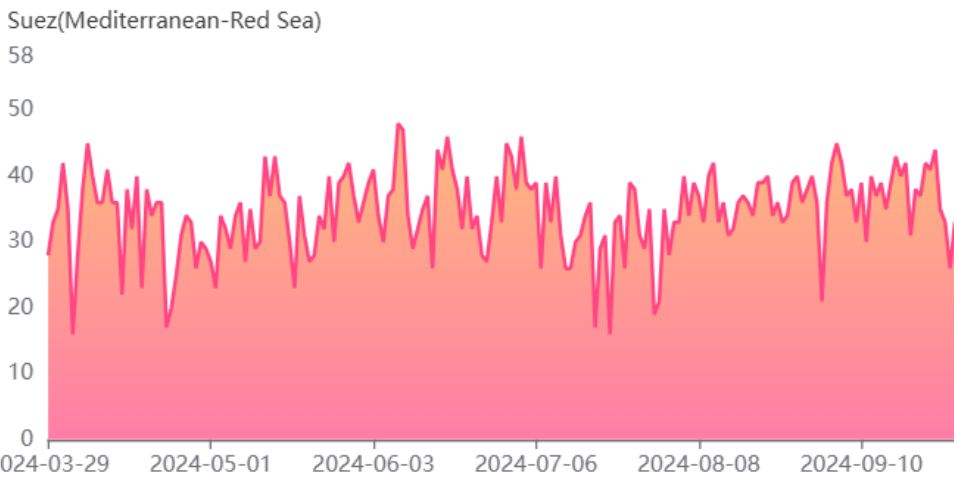
本报告数据截止时间为2024年9月29日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Sep 29th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	1441	35	-15
Miss.Riv.	4	159	-7	62
CJK	236	5126	331	-1100
Pa.Atlan.	47	1731	-65	7
Colum.Riv.	6	147	-10	53
Suez.Med.	33	1074	-14	17
Pa.Pac.	52	1708	-39	245
ZJK	55	3101	-90	201

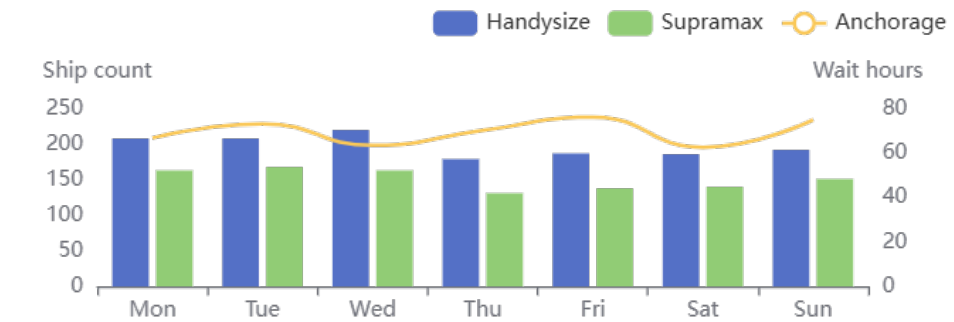


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

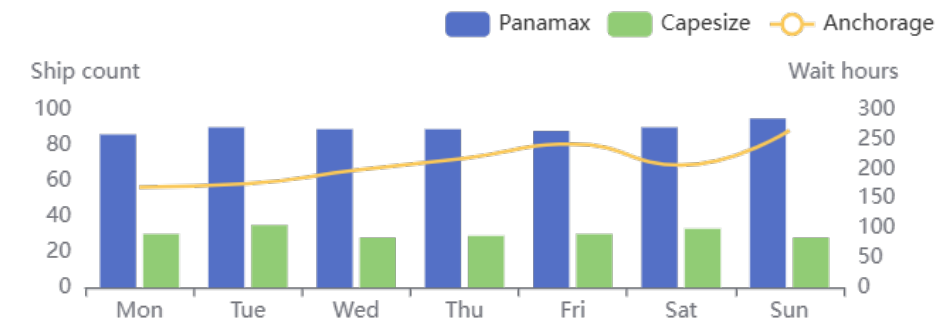
Type	M	T	W	Th	F	Sat	Sun
HDY	208	208	220	179	187	186	192
SMX	163	168	163	131	138	140	151
WT.h.	66.8	73.2	63.5	70.2	76.2	62.6	75



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

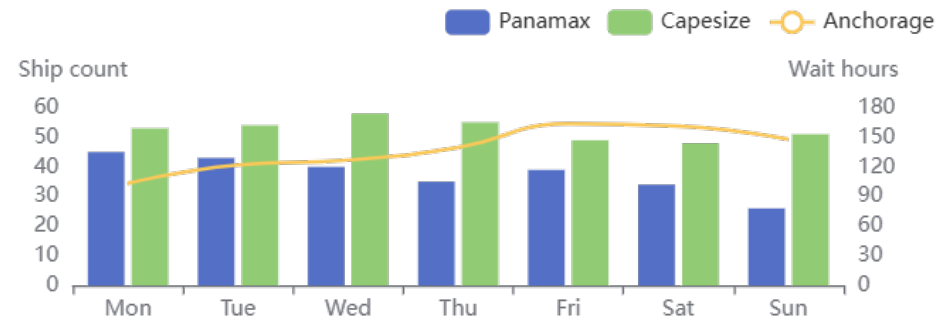
Type	M	T	W	Th	F	Sat	Sun
Pan.	86	90	89	89	88	90	95
Cap	30	35	28	29	30	33	28
WT.h.	169.5	175.1	198.2	218	242	206.5	265



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

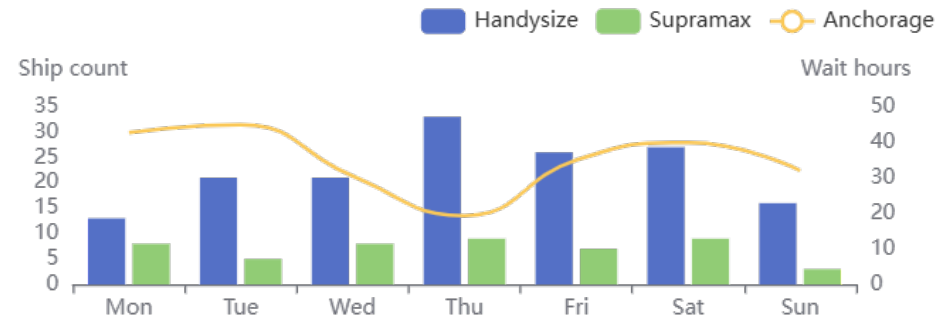
Type	M	T	W	Th	F	Sat	Sun
Pan.	45	43	40	35	39	34	26
Cap	53	54	58	55	49	48	51
WT.h.	103.3	122	126.9	139.8	163.8	161.3	148



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

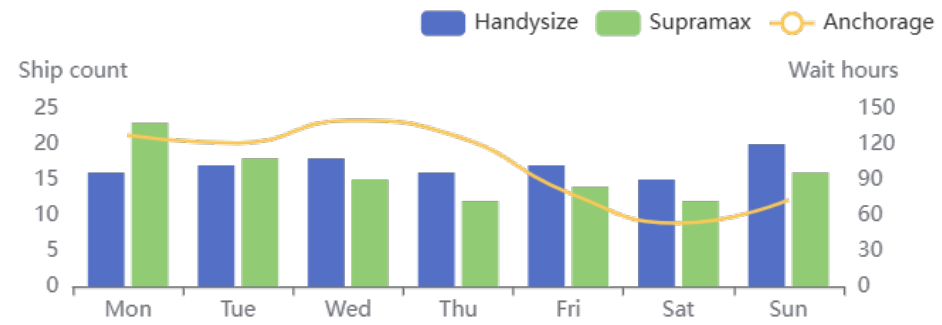
Type	M	T	W	Th	F	Sat	Sun
HDY	13	21	21	33	26	27	16
SMX	8	5	8	9	7	9	3
WT.h.	42.7	44.9	30.5	19.35	35	39.9	32



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

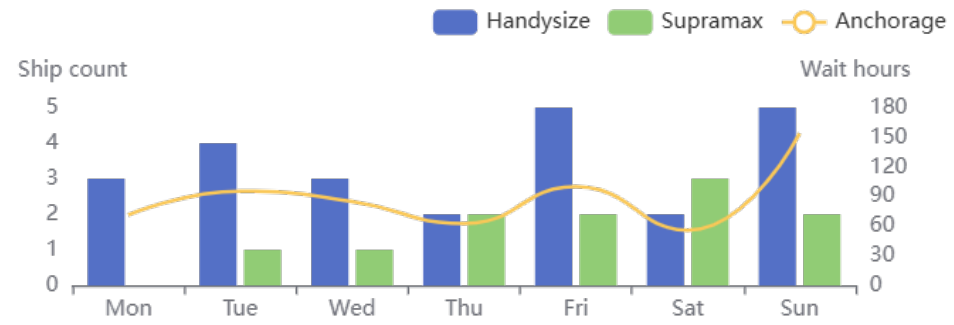
Type	M	T	W	Th	F	Sat	Sun
HDY	16	17	18	16	17	15	20
SMX	23	18	15	12	14	12	16
WT.h.	127.4	121	140.1	126.3	79.1	53.4	73



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

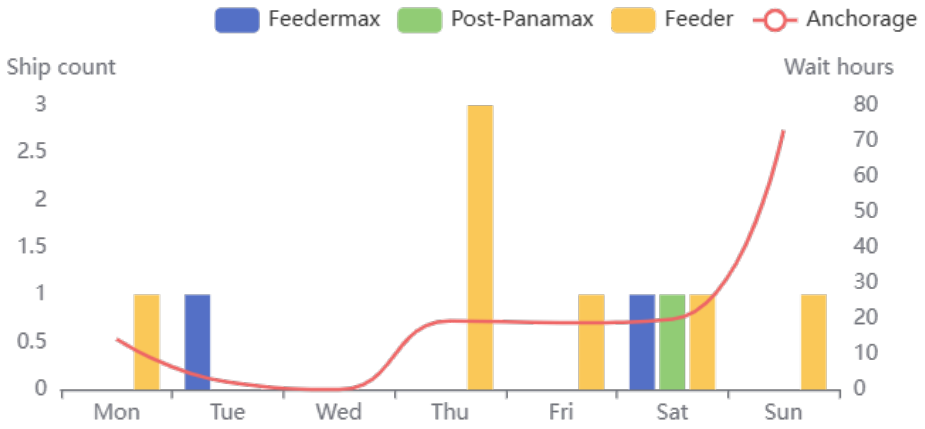
Type	M	T	W	Th	F	Sat	Sun
HDY	3	4	3	2	5	2	5
SMX	0	1	1	2	2	3	2
WT.h.	71.4	95.4	85.0	62.7	100	55.9	154



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

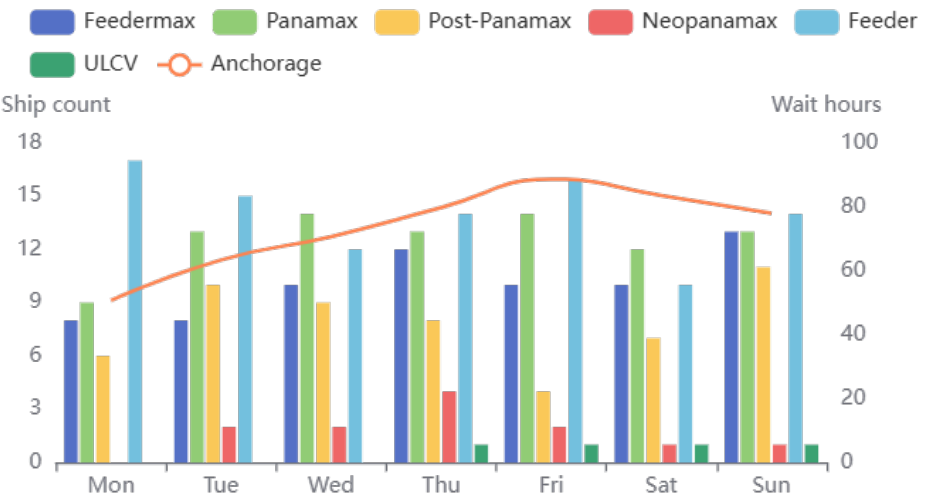
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	1	0	0	0	1	0
Pan.	0	0	0	0	0	0	0
PPx	0	0	0	0	0	1	0
NPx	0	0	0	0	0	0	0
Fd	1	0	0	3	1	1	1
WT.h.	14.2	2.1	0.0	19.3	18.8	19.8	73
Ulcw	0	0	0	0	0	0	0



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

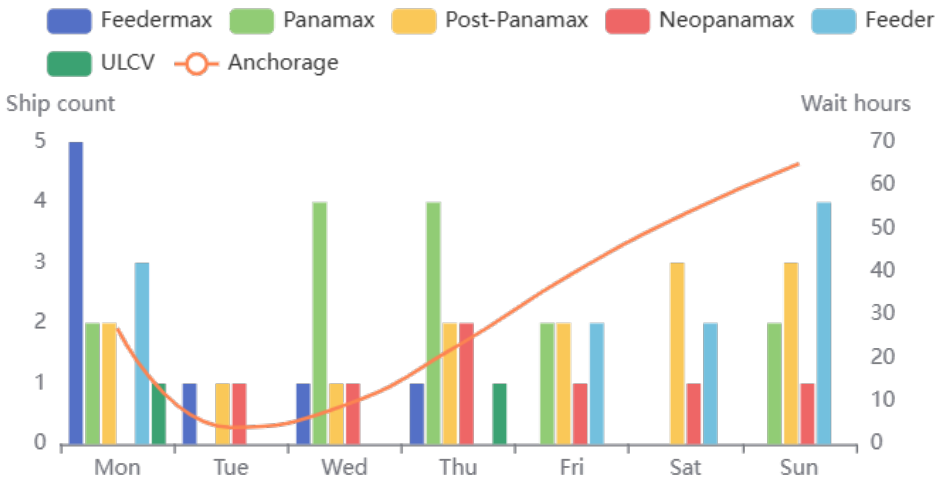
Type	M	T	W	Th	F	Sat	Sun
F.ma.	8	8	10	12	10	10	13
Pan.	9	13	14	13	14	12	13
PPx	6	10	9	8	4	7	11
NPx	0	2	2	4	2	1	1
Fd	17	15	12	14	16	10	14
Ulcw	0	0	0	1	1	1	1
WT.h.	50.75	63.4	70.7	79.8	88.7	83.6	78



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

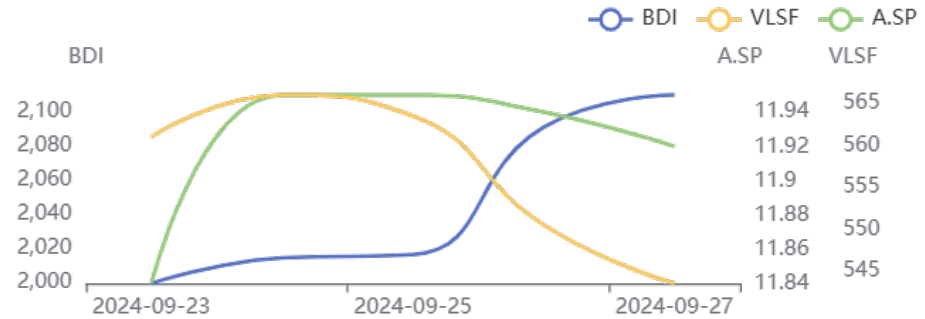
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	5	1	1	1	0	0	0
Pan.	2	0	4	4	2	0	2
PPx	2	1	1	2	2	3	3
NPx	0	1	1	2	1	1	1
Fd	3	0	0	0	2	2	4
Ulcw	1	0	0	1	0	0	0
WT.h.	26.8	3.9	9	22.9	39.5	53.45	65



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

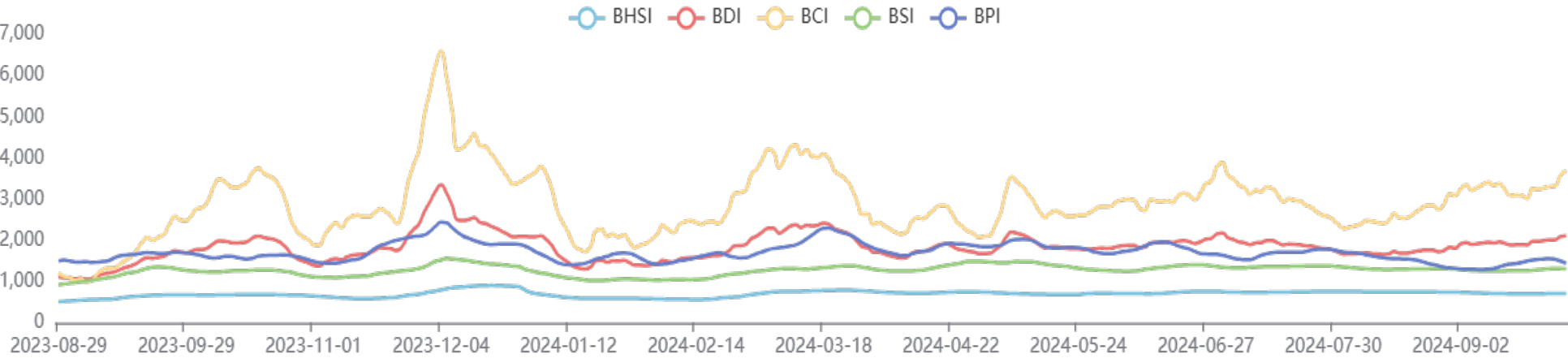
Type	M	T	W	Th	F	Sat	Sun
BDI	1552	1560	1543	1498	1446		
VLSF	561.00	566.00	563.50	550.50	543.50		
A.SP	11.84	11.95	11.95	11.94	11.92	11.7	



第三部分 航运市场 SHIPPING MARKET

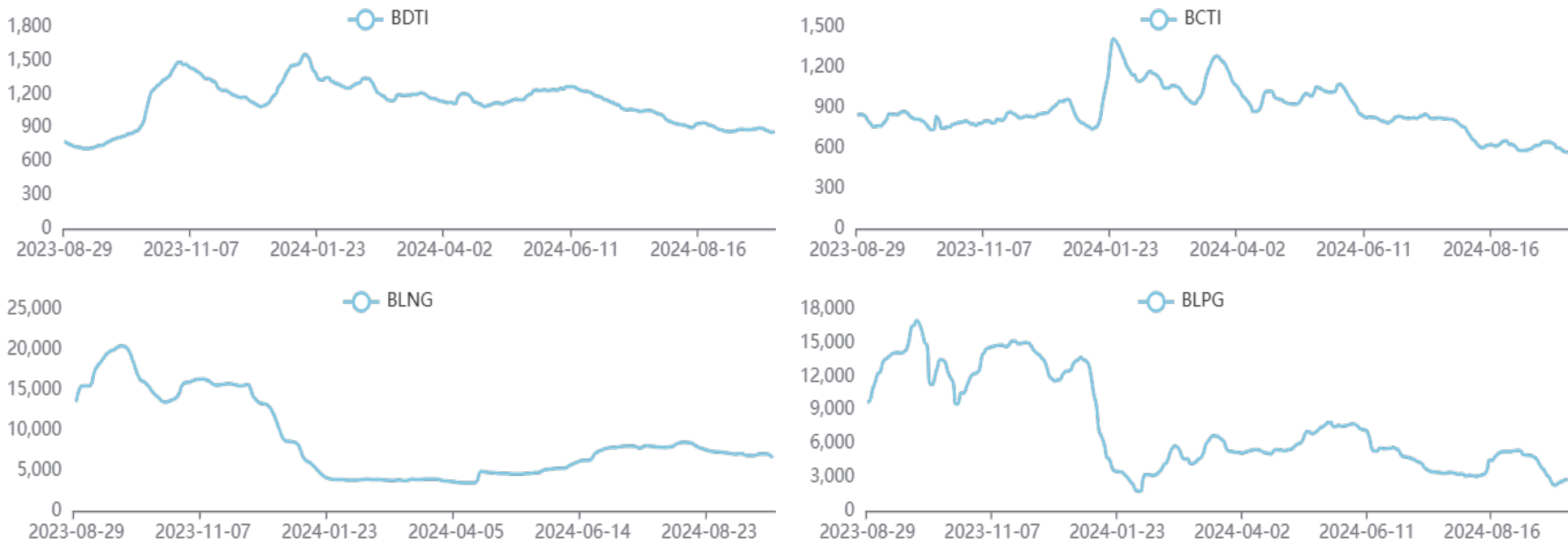
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	2110	133.0	6.73	16.32	20.43
BCI	3689	454.0	14.03	19.04	43.21
BPI	1446	-92.0	-5.98	9.88	-15.49
BSI	1306	17.0	1.32	0.0	-0.91
BHSI	710	3.0	0.42	-4.57	4.26



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	862	-32.0	-3.58	-2.16	5.9
BCTI	566	-62.0	-9.87	-7.82	-31.31
BLNG	6590	-455.0	-6.46	-9.1	-64.21
BLPG	2775	494.0	21.66	-48.22	-82.63



第四部分 运力分布 SUPPLY DISTRIBUTION

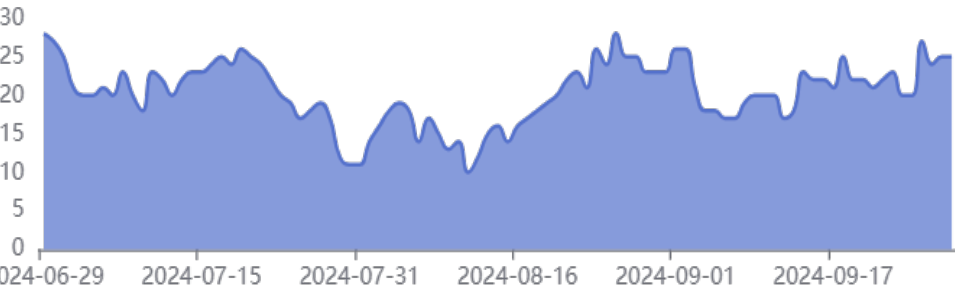


好望角型散货船 Capesize

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	23	20	20	27	24	25	25



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.

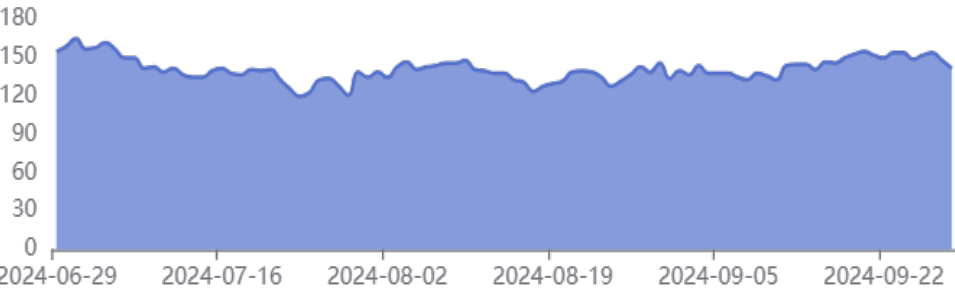
Type	M	T	W	Th	F	Sat	Sun
Cape	29	29	27	27	20	20	21

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.

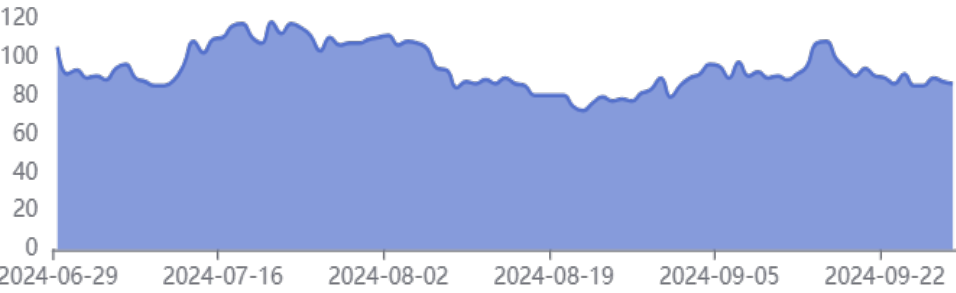
Type	M	T	W	Th	F	Sat	Sun
Pan.	153	153	148	151	153	147	141



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.

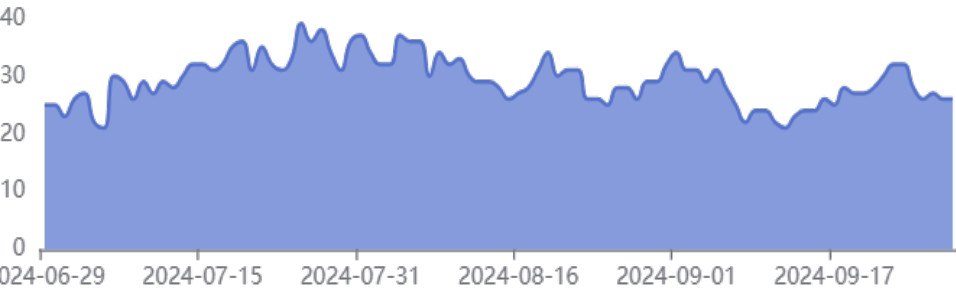
Type	M	T	W	Th	F	Sat	Sun
Cape	86	91	85	85	89	87	86



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.

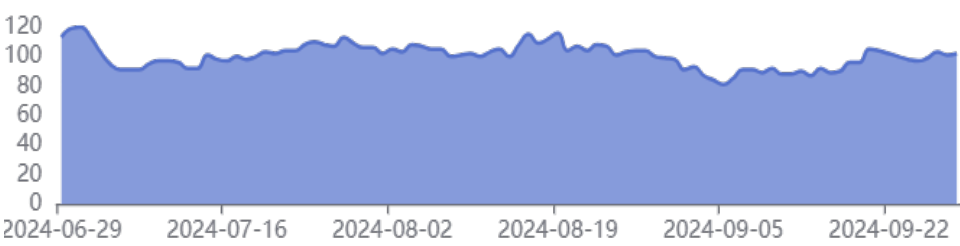
Type	M	T	W	Th	F	Sat	Sun
Pan.	20	19	22	23	20	23	22



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.	100	98	97	99	103	101	102

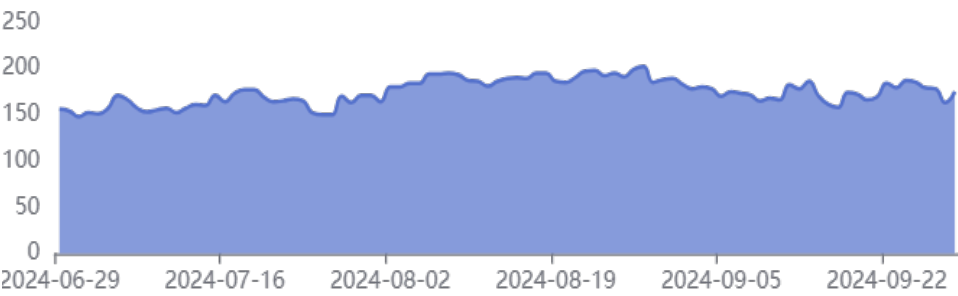


超大灵便型散货 SUPRAMAX

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.

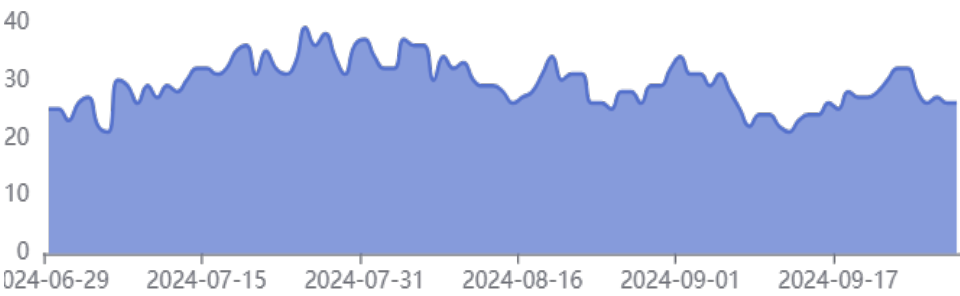
Type	M	T	W	Th	F	Sat	Sun
SMX	179	187	185	179	178	163	175



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.

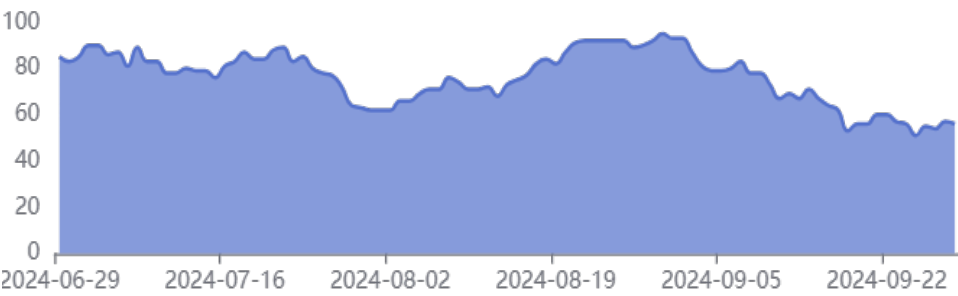
Type	M	T	W	Th	F	Sat	Sun
SMX	32	32	28	26	27	26	26



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.

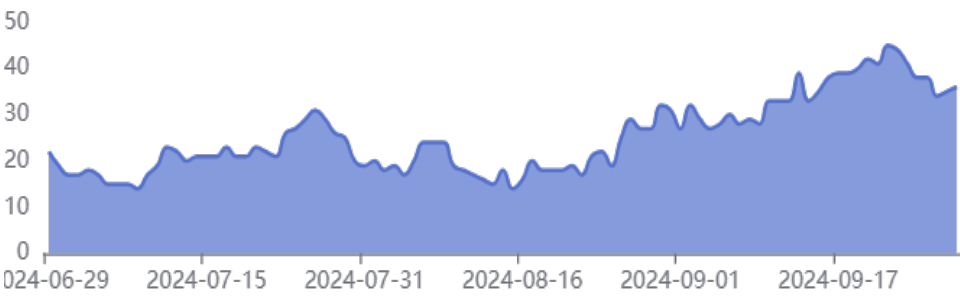
Type	M	T	W	Th	F	Sat	Sun
SMX	44	41	38	38	34	35	36



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.

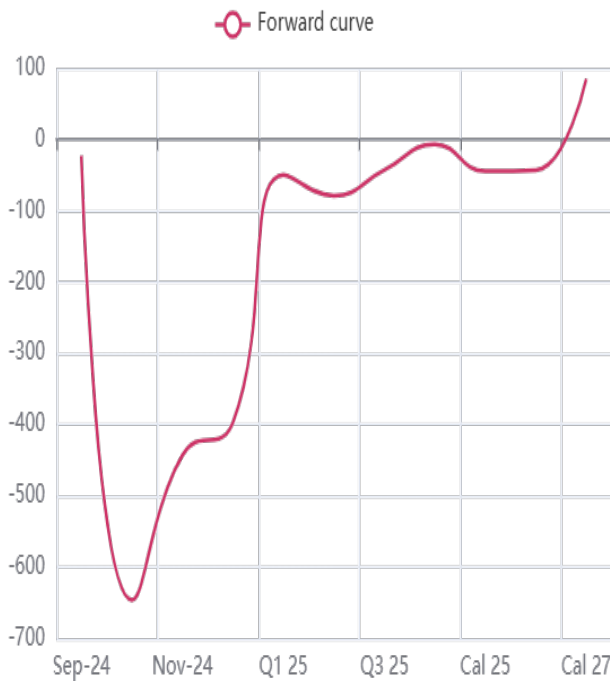
Type	M	T	W	Th	F	Sat	Sun
SMX	57	56	51	55	54	57	56



第五部分 远期运价协议 FFA

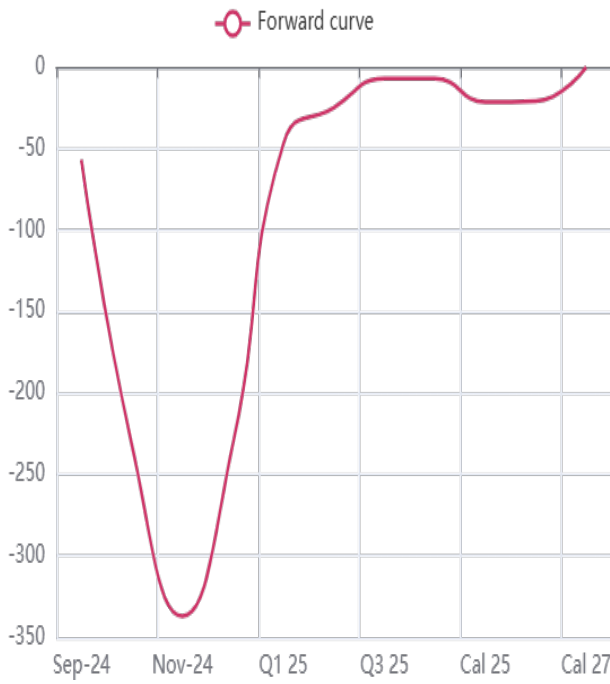
好望角型散货船Capesize

5TC	\$/day	WoW	
Sep-24	27,420.00	-23.0	-0.1 %
Oct-24	30,725.00	-646.0	-2.1 %
Nov-24	27,482.00	-443.0	-1.6 %
Q4 24	28,370.33	-397.33	-1.4 %
Q1 25	17,129.00	-50.0	-0.3 %
Q2 25	20,700.00	-79.0	-0.4 %
Q3 25	24,875.00	-43.0	-0.2 %
Q4 25	24,975.00	-7.0	0.0 %
Cal 25	21,919.75	-44.75	-0.2 %
Cal 26	21,032.00	-43.0	-0.2 %
Cal 27	20,439.00	85.0	0.4 %



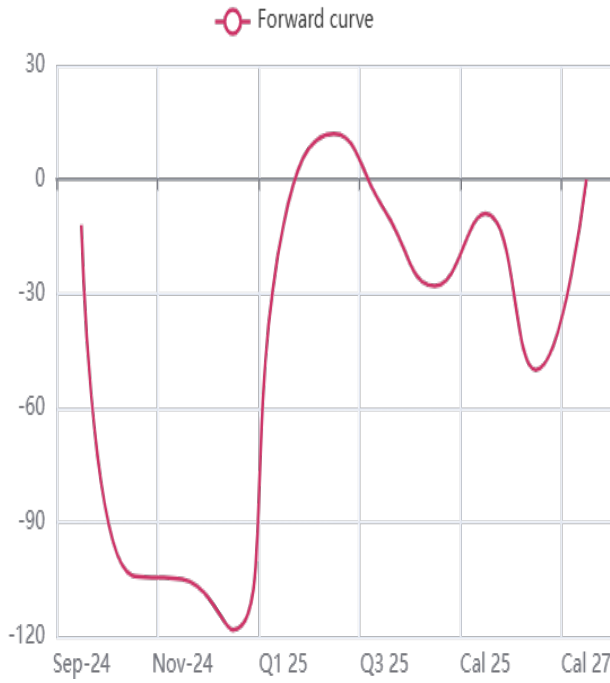
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Sep-24	11,457.00	-57.0	-0.5 %
Oct-24	13,039.00	-232.0	-1.7 %
Nov-24	13,643.00	-337.0	-2.4 %
Q4 24	13,387.00	-231.33	-1.7 %
Q1 25	11,421.00	-47.0	-0.4 %
Q2 25	13,200.00	-25.0	-0.2 %
Q3 25	13,164.00	-7.0	-0.1 %
Q4 25	12,829.00	-7.0	-0.1 %
Cal 25	12,653.50	-21.5	-0.2 %
Cal 26	12,468.25	-21.0	-0.2 %
Cal 27	12,429.00	0.0	0.0 %



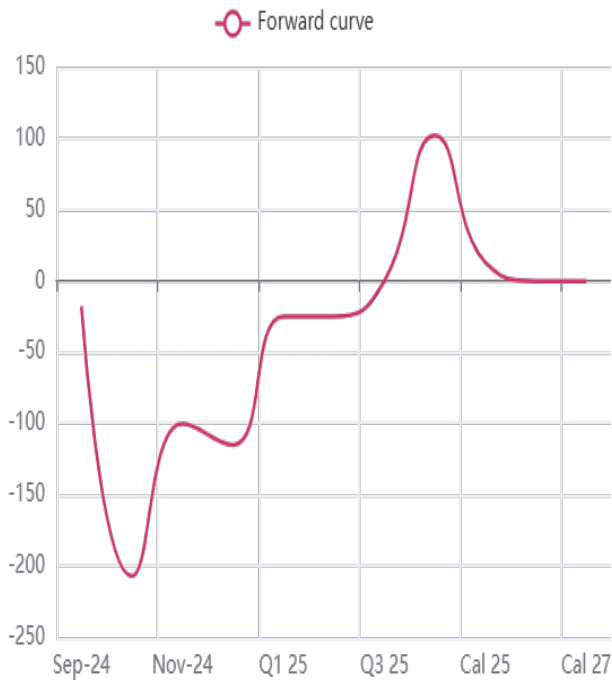
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Sep-24	14,146.00	-12.0	-0.1 %
Oct-24	14,575.00	-104.0	-0.7 %
Nov-24	14,408.00	-105.0	-0.7 %
Q4 24	14,305.33	-118.33	-0.8 %
Q1 25	11,892.00	-12.0	-0.1 %
Q2 25	13,433.00	12.0	0.1 %
Q3 25	13,263.00	-8.0	-0.1 %
Q4 25	12,944.00	-28.0	-0.2 %
12,883.00	Cal 25	-9.0	-0.1 %
Cal 26	12,463.00	-50.0	-0.4 %
Cal 27	12,342.00	0.0	0.0 %



灵便型散货船Handysize

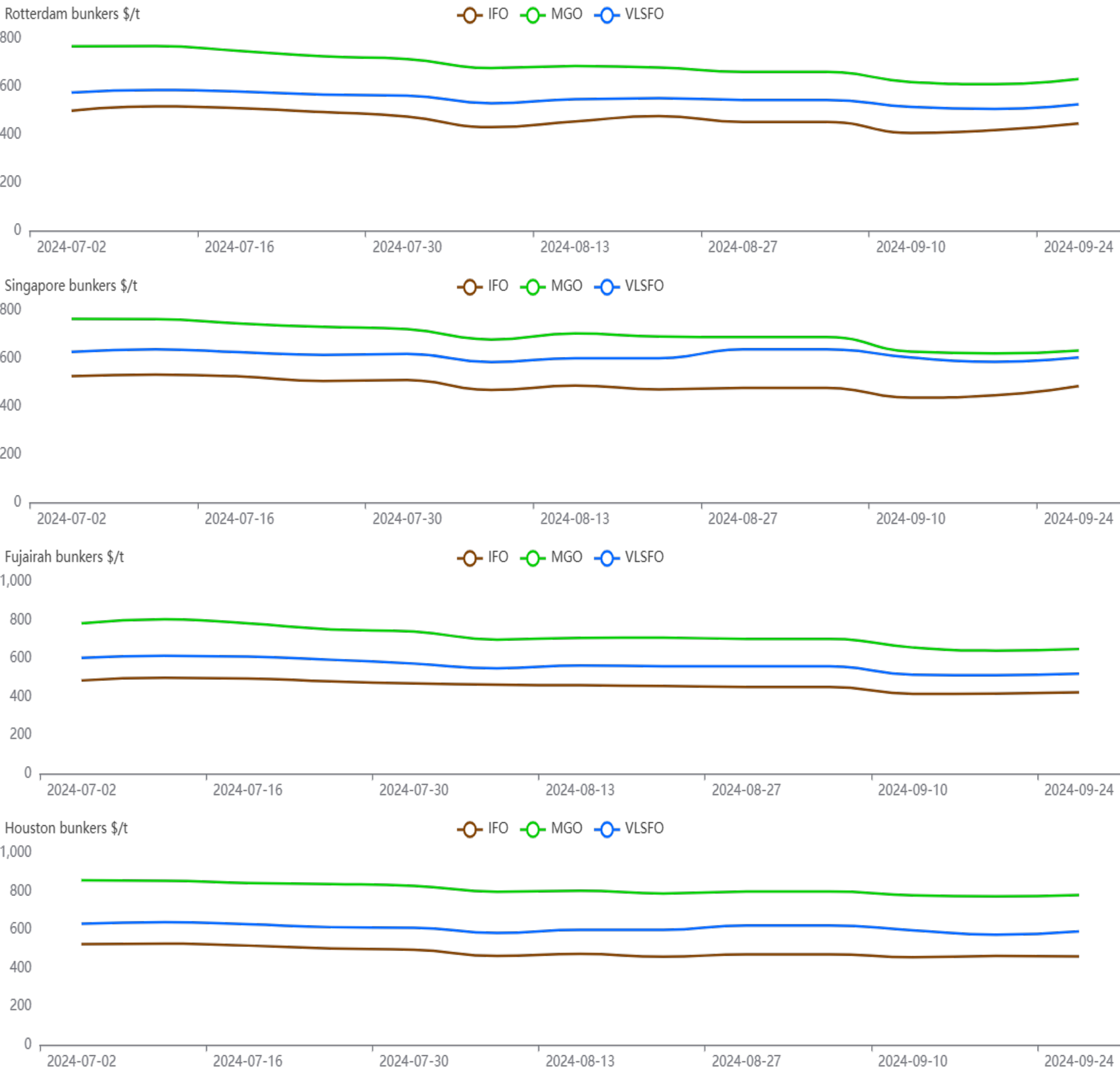
7TC	\$/day	WoW	
Sep-24	12,838.00	-18.0	-0.1 %
Oct-24	13,156.00	-207.0	-1.5 %
Nov-24	13,088.00	-100.0	-0.8 %
Q4 24	13,031.33	-115.0	-0.9 %
Q1 25	10,900.00	-25.0	-0.2 %
Q2 25	12,263.00	-25.0	-0.2 %
Q3 25	12,125.00	0.0	0.0
Q4 25	11,964.00	102.0	0.9 %
Cal 25	11,813.00	13.0	0.1 %
Cal 26	11,538.00	0.0	0.0 %
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	612.5	482.5	675.0	130.0	1.5	1.17	-1.52
Singapore	604.5	485.0	633.5	119.5	-20.5	-14.64	-26.01
Rotterdam	526.5	447.0	632.5	79.5	-9.0	-10.17	-13.59
Fujairah	521.0	424.5	650.0	96.5	0.5	0.52	-10.23
Houston	591.5	461.5	781.5	130.0	19.5	17.65	-13.62

(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		0.0	0.0	5.64	-12.71
Maize	213.0		2.0	0.95	6.5	-13.41
Soybeans	218.0		6.0	2.83	10.1	-18.66
Rice	242.0		0.0	0.0	-1.63	-3.2
Barley	213.0		-1.0	-0.47	4.41	-8.58
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	71.26	0.63	0.89	-5.95	-21.79
Brent	USD/Bbl	74.7	1.53	2.09	-6.6	-20.4
Natural Gas	USD/MMBtu	2.65	0.32	13.73	31.84	-0.38
Gasoline	USD/Gal	2.02	0.04	2.02	-11.79	-25.19
Heating Oil	USD/Gal	2.18	0.05	2.35	-6.44	-34.73
Ethanol	USD/Gal	1.57	-0.11	-6.55	-14.21	-33.47
Naphtha	USD/T	626.26	1.45	0.23	-4.96	-10.64
Propane	USD/Gal	0.64	-0.02	-3.03	-16.88	-16.88
Uranium	USD/Lbs	79.45	-0.05	-0.06	-3.58	28.15
Methanol	CNY/T	2357.0	42.0	1.81	-3.56	-8.07
TTF Gas	EUR/MWh	36.2	0.95	2.7	-1.36	2.81
UK Gas	GBp/thm	86.43	2.12	2.51	-1.78	-3.22
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.36	0.17	4.06	3.32	15.96
Coal	USD/T	139.5	-0.15	-0.11	-3.93	-13.08
Steel	CNY/T	3030.0	-7.0	-0.23	-0.75	-20.6
Iron Ore	USD/T	91.93	-0.05	-0.05	-6.24	-26.75
Aluminum	USD/T	2522.0	25.0	1.0	-0.79	14.64
Lithium	CNY/T	72500.0	0.0	0.0	-2.03	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2633.17	63.89	2.49	4.33	36.72
Silver	USD/t.oz	31.0	0.47	1.54	2.99	34.14
Platium	USD/t.oz	965.4	-15.6	-1.59	-0.17	3.83
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.11		0.0	0.0	-0.89	3.74
USD/CNY	7.04		-0.06	-0.85	-1.12	-3.43

第八部分 本周话题 WEEKLY TOPIC



针对红海一艘正在燃烧的油轮的救助安排进入攻坚阶段

地缘政治冲突是全球航线是否能正常运行面临的重大威胁，今年8月下旬胡塞武装对希腊油轮Sounion号的袭击更加凸显了地缘政治对航运和海洋环境的重大威胁，国与国之间的重大争端更有可能导致海上贸易中断。

在船舶保险公司的推动下，9月21号，Sounion号在红海遭到袭击发生一个多月之后，海事救助专家们开始对该油轮实施第二阶段的施救拖带工作。这艘命运多舛的油轮Sounion号在胡塞武装多次袭击后首先被拖离危险区域，而未来可能需要几周时间才能扑灭甲板上零星的明火。

8月21日，这艘油轮从伊拉克装载石油出发前往希腊，途经红海前往苏伊士运河途中遭到袭击，袭击发生几小时后，船员们弃船安全离开。也门武装组织成员之后登上该船并在甲板上引爆炸药点燃甲板几处明火，这艘满载货物的苏伊士号目前仍在燃烧。

9月14号，这艘163800载重吨的Sounion号油轮(2006年建造，最终受益股东是Delta Tankers)被转移到更北的红海更安全的水域，这是海事救助公司采取的第一阶段应急措施，以免胡塞武装制造更大的麻烦，避免对红海脆弱的海洋环境造成毁灭性的打击。在这个安全

水域专家小组正集中精力扑灭火焰，专业设备已经抵达，防止货舱内积聚的气体进一步爆炸。幸运的是，虽然该油轮遭到胡塞武装三次袭击，所有的导弹都击中了右舷，损坏了发动机舱并引发了火灾，胡塞叛军还登上甲板放火，由于火焰尚未到达船上的货物，因此没有迫在眉睫的结构性导致船只沉没或爆炸的风险，奇迹的是近100万桶伊拉克原油并没有泄漏。据说这批原油货物归希腊炼油商Motor Oil所有。

9月21日，三艘军舰护送10000马力的Aigaion Pelagos(2010年建造)和另外两艘救助船驶向Sounion号油轮。这支由欧盟军舰和救助船组成的船队开始在红海拖拽这艘受损且正在燃烧的油轮到更加安全的水域。可能在苏伊士运河附近，通过船对船转运船上的原油。这是自采取应急措施的第二阶段的救助工作，以最终实现挽救这艘正在燃烧的油轮，采取综合灭火措施并防止货油的泄漏，防止海洋环境灾难的发生。

为了避免红海地区潜在的海洋环境灾难，SOUNIO油轮的救助工作至关重要，在保险公司和各方的努力下EUNAVFOR Aspides积极参与了这项复杂的救助行动。

Geopolitical conflict is the biggest threat to the functioning of global shipping routes, and the Houthis attacked on the Greek oil tanker Sounion in late August highlighted the major geopolitical threats to shipping and the Marine environment, with major disputes between countries more likely to lead to the disruption of maritime trade.

On 21 September, more than a month after the attack on the tanker Sounion in the Red Sea, maritime salvage experts began the second phase of a salvage towing operation, prompted by the ship's insurance company. The ill-fated oil tanker Sounion was first towed away from the danger zone after repeated attacks by the Houthis, and it could take weeks to extinguish sporadic open fires on its deck.

The tanker was carrying oil from Iraq to Greece on its way through the Red Sea to the Suez Canal when it was attacked on Aug. 21. The crew abandoned ship and left safely hours after the attack. Members of the Yemeni armed group later boarded the ship and detonated explosives on the deck, igniting several open fires on the deck. The cargo ship Suez is still burning.

On September 14th the 163,800 DWT Sounion (built in 2006 and eventually owned by Delta Tankers) was moved further north to safer waters in the Red Sea, the first stage of emergency measures taken by the maritime rescue company to avoid further trouble from the Houthis. Avoid devastating blows to the fragile Marine environment of the Red Sea. In this safe water specialist teams are focusing on putting out the flames and specialist equipment has arrived to prevent further explosions of the gas that has built up in the cargo hold. Fortunately, although the tanker was attacked three times by the Houthis, all the missiles hit the starboard side, damaging the engine room and starting a fire, the Houthis also boarded the deck and set fire to it, as the flames had not yet reached the cargo on board, there was no imminent structural risk of the ship sinking or exploding, and miraculously nearly 1 million barrels of Iraqi crude oil did not spill. The crude cargo is said to be owned by Greek refiner Motor Oil.

On 21 September, three warships escorted the 10,000-horsepower Aigaion Pelagos (built in 2010) and two other salvage vessels to the tanker Sounion. The flotilla of European Union warships and salvage vessels began towing the damaged and burning tanker in the Red Sea to safer waters. It may be near the Suez Canal, transferring crude oil on board ships by ship-to-ship. This is the second stage of rescue work since emergency measures were taken to finally save the burning tanker, take comprehensive fire-fighting measures and prevent the leakage of cargo oil to prevent the occurrence of Marine environmental disasters.

In order to avoid a potential Marine environmental disaster in the Red Sea region, the salvage work of the SOUNIO tanker was crucial, and EUNAVFOR Aspides actively participated in this complex salvage operation, thanks to the efforts of the insurance company and various parties.

刘红太