



2024年 第41周市场周报

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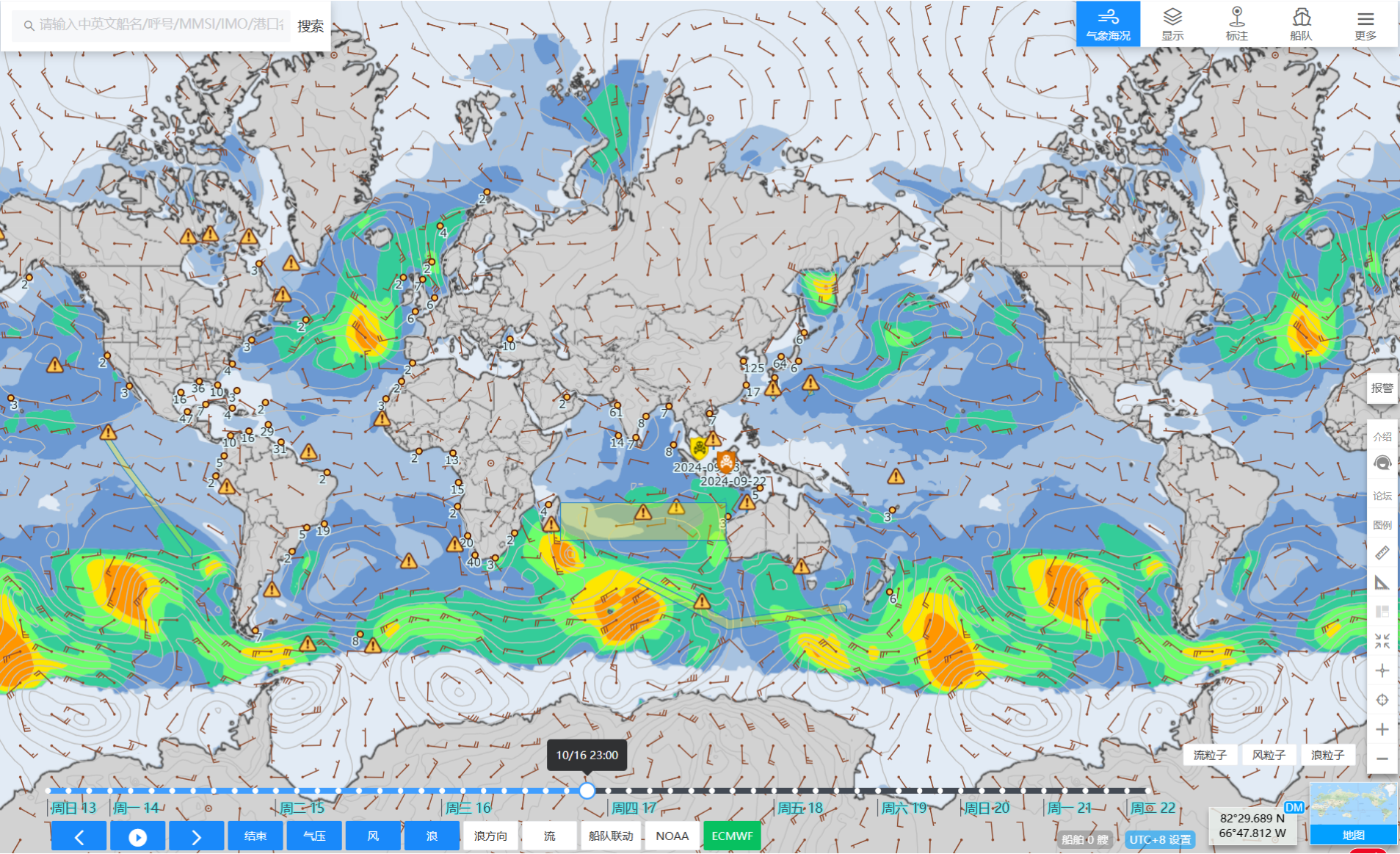
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本周话题 WEEKLY TOPIC

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821个，远东和环加勒比海居多，请相关水域船舶注意航行警告内容。There are currently 821 navigational warnings in effect around the ocean on hiFleet with the Far 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4级增强到7级，相关海域轻浪到大浪；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5-6级风，台湾海峡中浪；南海大部海域风力从6级减弱到4级，中浪。The coming week the wind in Bohai Sea will become strong from moderate to near gale and wave up to rough. Yellow Sea will experience fresh breeze with moderate wave. And China East Sea will experience strong breeze with moderate sea. The wind in the Taiwan Strait stays strong breeze with moderate wave. In most of the South China Sea the wind will be from strong to moderate with moderate wave there.

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

10月7号，一艘5800载重吨的“Optima”号(2008年建造)早些时候遭到袭击，可能是俄罗斯为了打击乌克兰的海运贸易而采取的联合行动。乌克兰副总理Oleksiy Kuleba在他的电报频道上写道，这艘悬挂帕劳国旗的船于10月7日早些时候抵达敖德萨进行装载。敖德萨地区州长 Oleh Kiper在他的电报频道上证实了这一事件。On October 7, a 5,800 DWT Optima (built in 2008) was attacked later in what may have been a coordinated Russian effort to crack down on Ukraine's seaborne trade. Ukrainian Deputy Prime Minister Oleksiy Kuleba wrote on his telegraph channel that the Palau-flagged ship arrived in Odessa early on Oct. 7 for loading. Oleh Kiper, governor of the Odessa region, confirmed the incident on his telegraph channel.

其它 Others

没有 Nil

备注 Remark

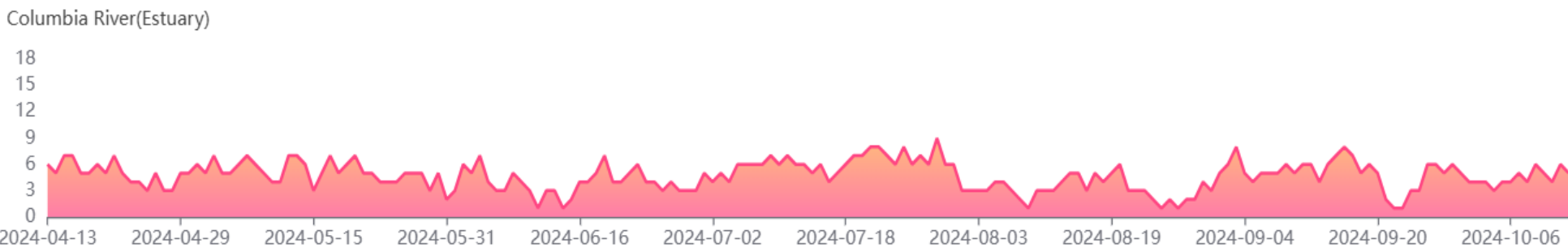
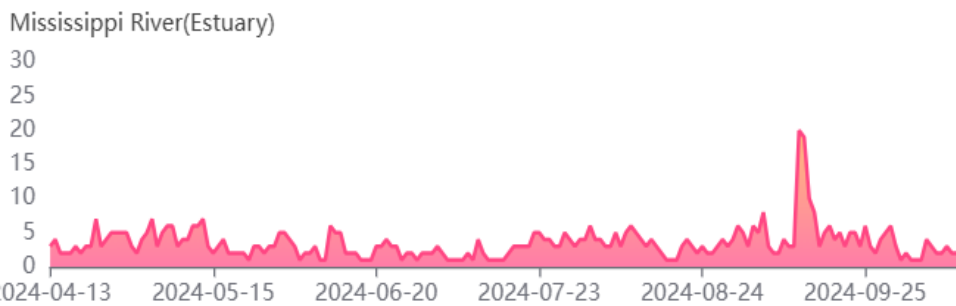
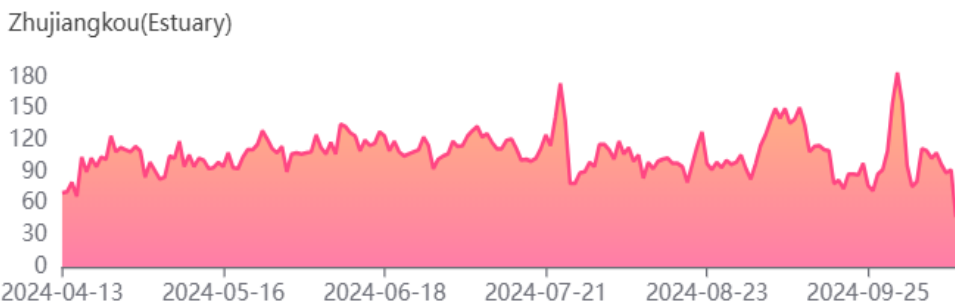
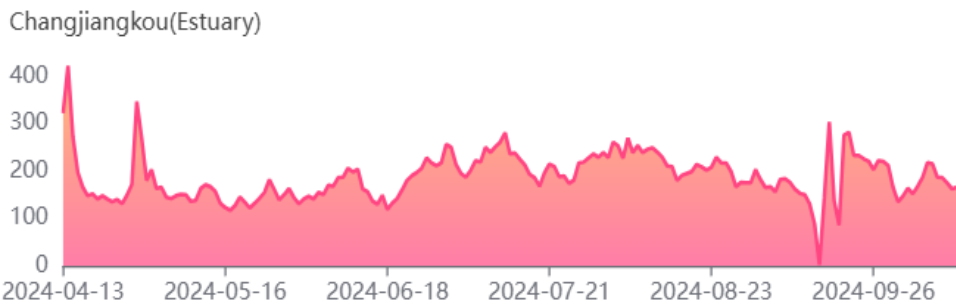
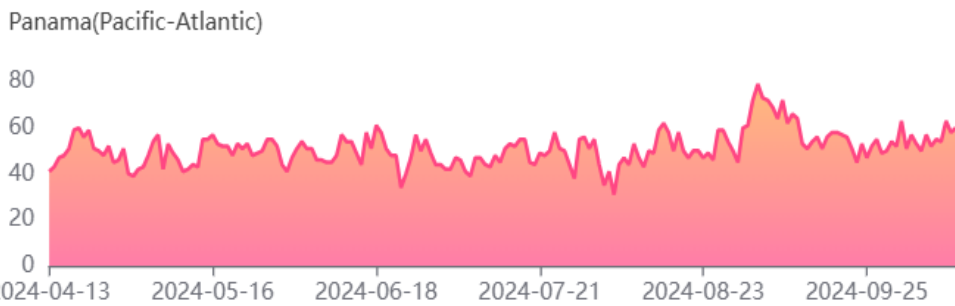
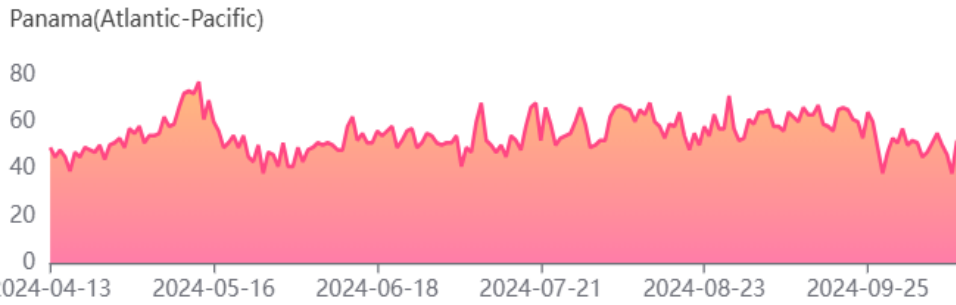
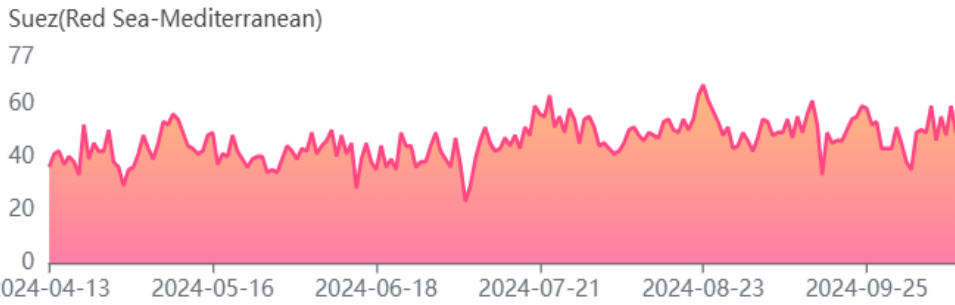
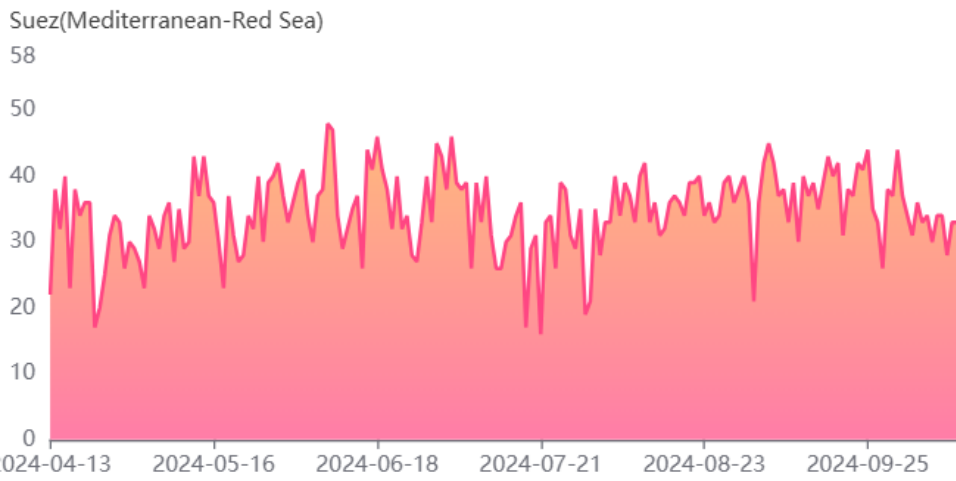
本报告数据截止时间为2024年10月13日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Oct 13th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	1414	61	-91
Miss.Riv.	2	100	-1	-42
CJK	166	5427	166	543
Pa.Atlan.	52	1566	-22	-157
Colum.Riv.	5	134	5	10
Suez.Med.	33	1042	-31	-26
Pa.Pac.	60	1573	19	-119
ZJK	47	2876	-211	-417

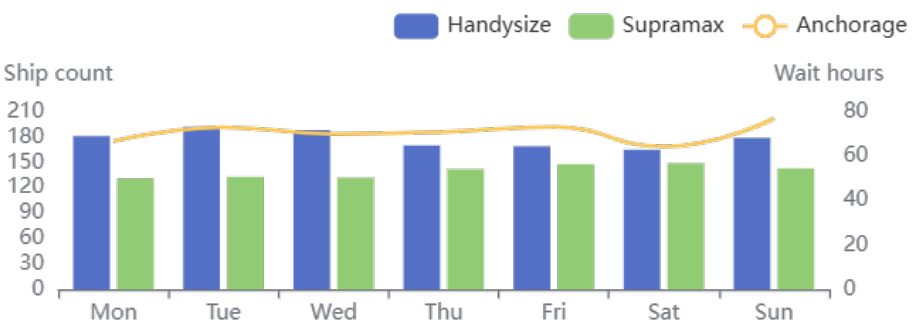


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

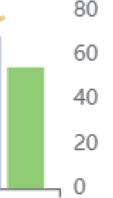
最近一周中国区域超大灵便型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

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	181	192	188	170	169	165	179
SMX	131	133	132	142	148	149	143
WT.h.	66.7	72.9	70.0	70.85	73.1	64.3	77



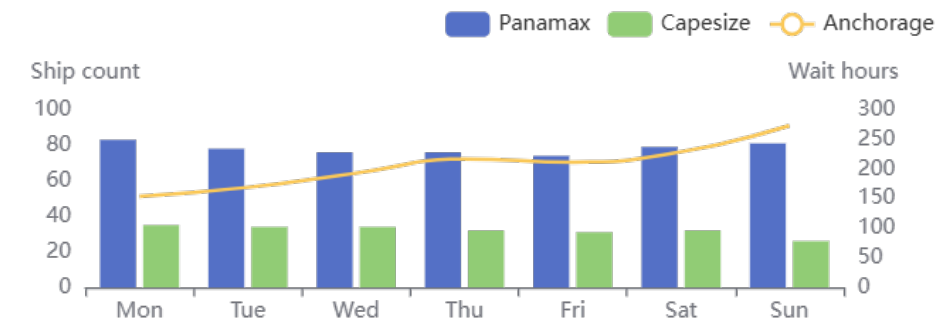
Wait hours



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

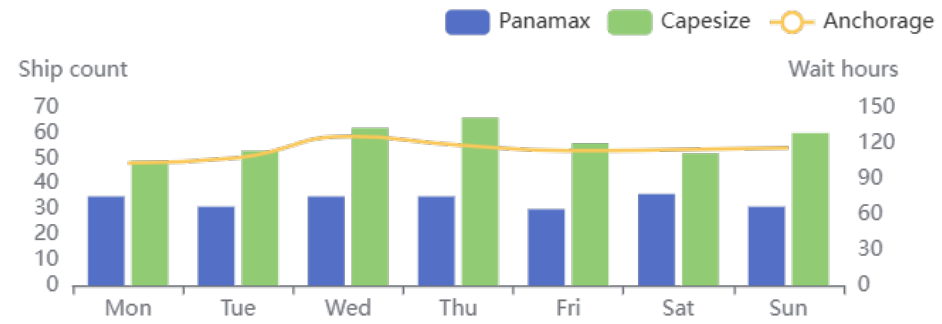
Type	M	T	W	Th	F	Sat	Sun
Pan.	83	78	76	76	74	79	81
Cap	35	34	34	32	31	32	26
WT.h.	153.5	168.9	192.9	216.9	211.4	228.9	273



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

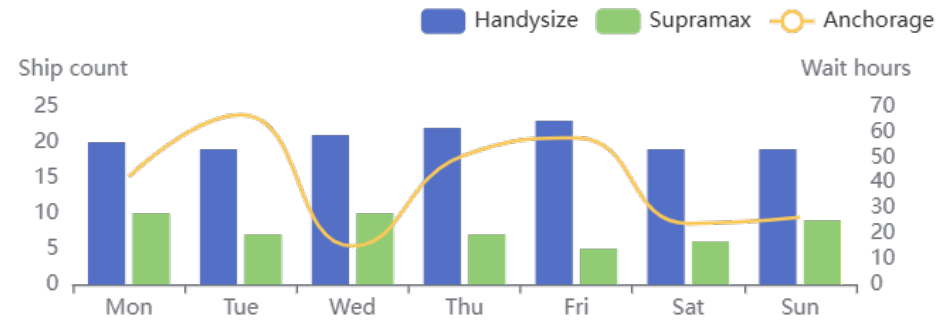
Type	M	T	W	Th	F	Sat	Sun
Pan.	35	31	35	35	30	36	31
Cap	49	53	62	66	56	52	60
WT.h.	103.3	107.8	125.8	118.5	113.7	114.6	116



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

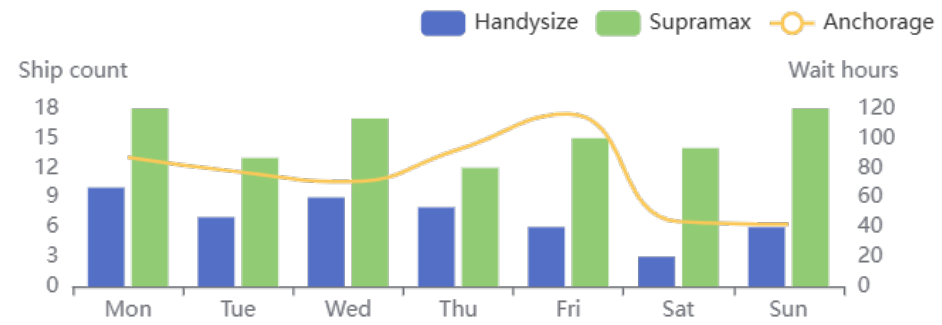
Type	M	T	W	Th	F	Sat	Sun
HDY	20	19	21	22	23	19	19
SMX	10	7	10	7	5	6	9
WT.h.	42.45	66.8	15.1	50.9	57.7	24	26.5



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

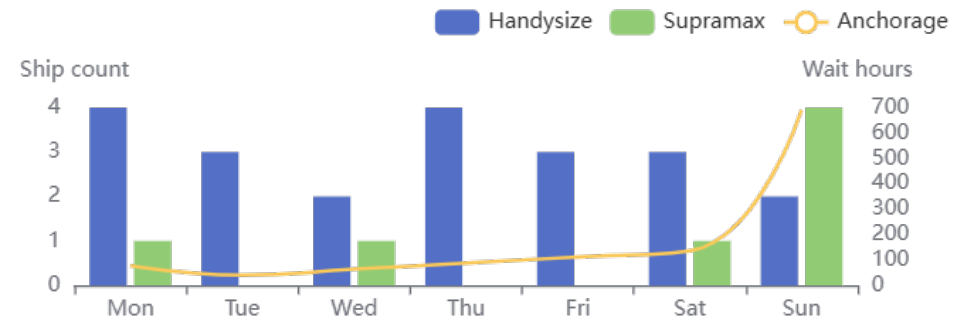
Type	M	T	W	Th	F	Sat	Sun
HDY	10	7	9	8	6	3	6
SMX	18	13	17	12	15	14	18
WT.h.	87.2	77.4	70.75	92.4	116.4	43.8	42



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

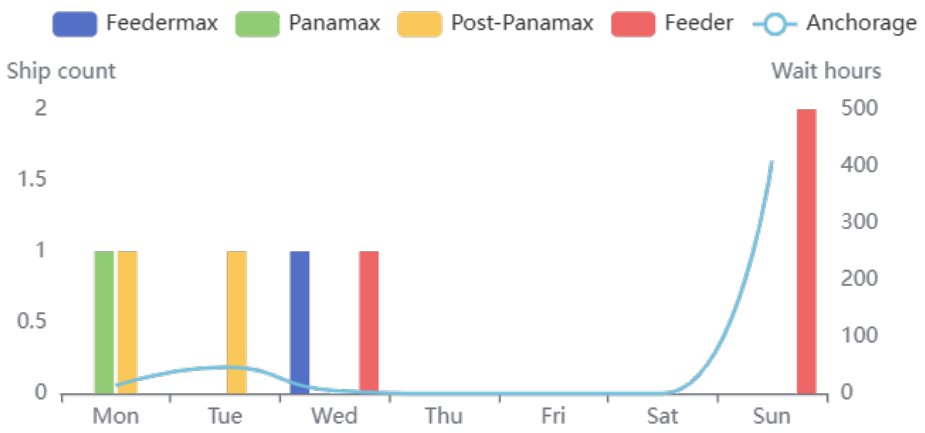
Type	M	T	W	Th	F	Sat	Sun
HDY	4	3	2	4	3	3	2
SMX	1	0	1	0	0	1	4
WT.h.	78.2	40.1	64.1	88.1	112.1	136.1	690.5



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

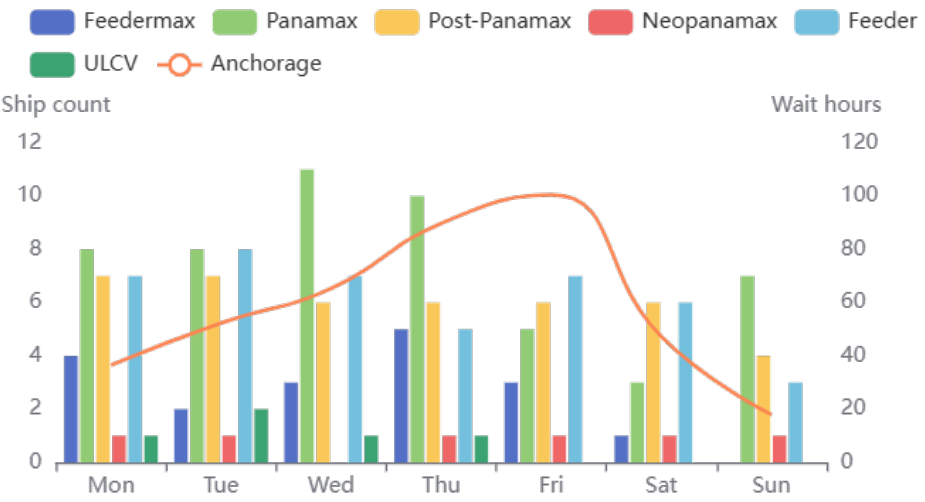
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	1	0	0	0	0
Pan.	1	0	0	0	0	0	0
PPx	1	1	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	1	0	0	0	2
WT.h.	13.7	46.5	5.1	0.0	0.0	0.0	409
Ulcw	0	0	0	0	0	0	0



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

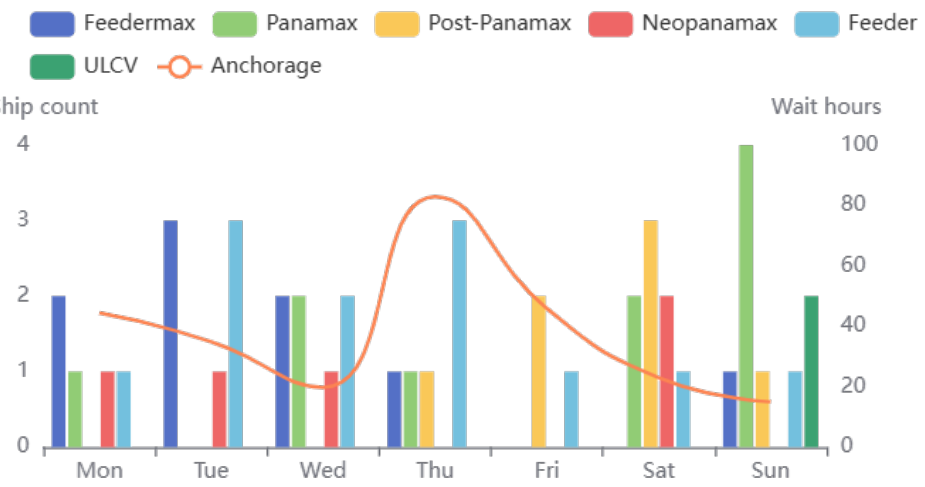
Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	2	3	5	3	1	0
Pan.	8	8	11	10	5	3	7
PPx	7	7	6	6	6	6	4
NPx	1	1	0	1	1	1	1
Fd	7	8	7	5	7	6	3
Ulcw	1	2	1	1	0	0	0
WT.h.	36.6	52.4	65.4	89.8	100.55	47.3	18



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

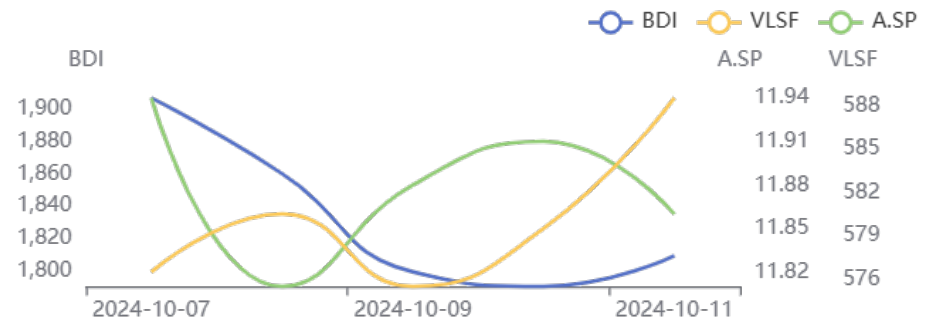
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	3	2	1	0	0	1
Pan.	1	0	2	1	0	2	4
PPx	0	0	0	1	2	3	1
NPx	1	1	1	0	0	2	0
Fd	1	3	2	3	1	1	1
Ulcw	0	0	0	0	0	0	2
WT.h.	44.5	34.9	19.8	82.9	45.9	23	15



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

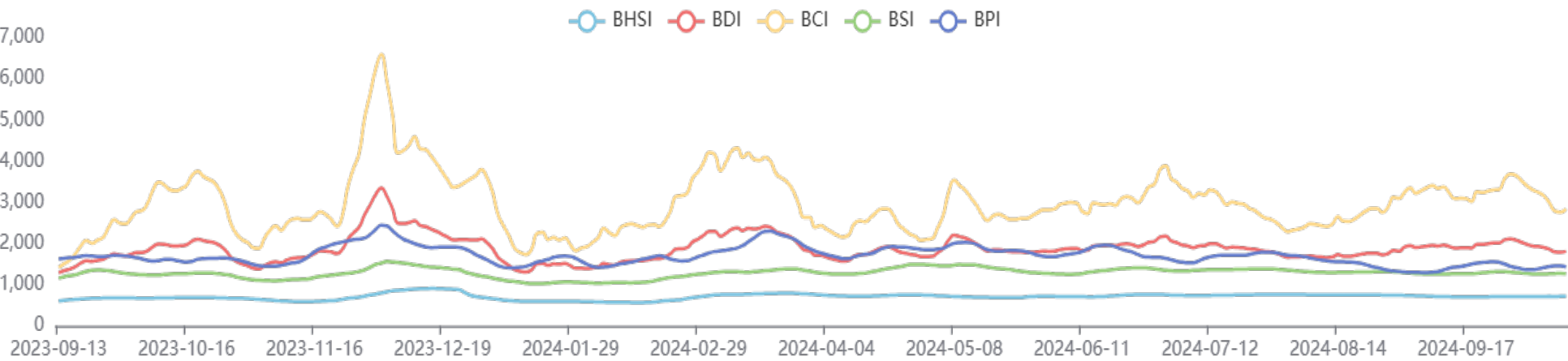
Type	M	T	W	Th	F	Sat	Sun
BDI	1415	1441	1457	1455	1435		
VLSF	576.50	580.50	575.50	579.50	588.50		
A.SP	11.94	11.81	11.88	11.91	11.86	11.92	



第三部分 航运市场 SHIPPING MARKET

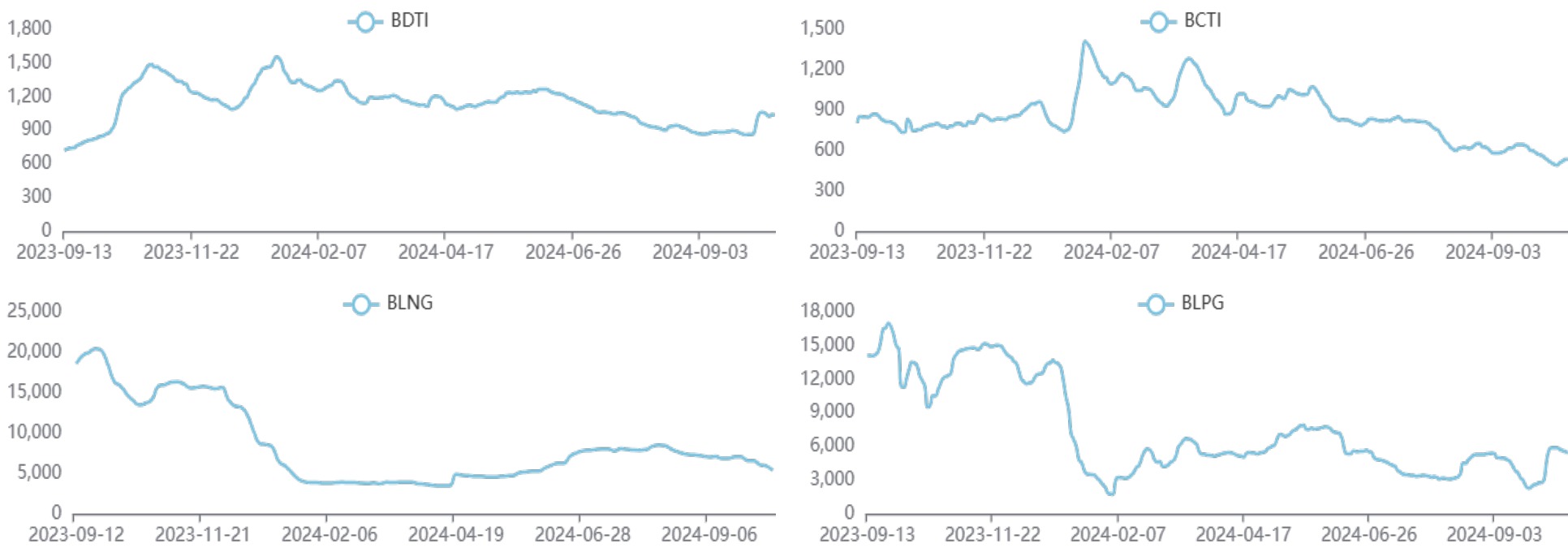
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1809	-119.0	-6.17	-4.29	-7.14
BCI	2835	-408.0	-12.58	-8.22	-14.19
BPI	1435	47.0	3.39	0.49	-11.09
BSI	1269	11.0	0.87	0.4	0.63
BHSI	718	6.0	0.84	1.56	5.43

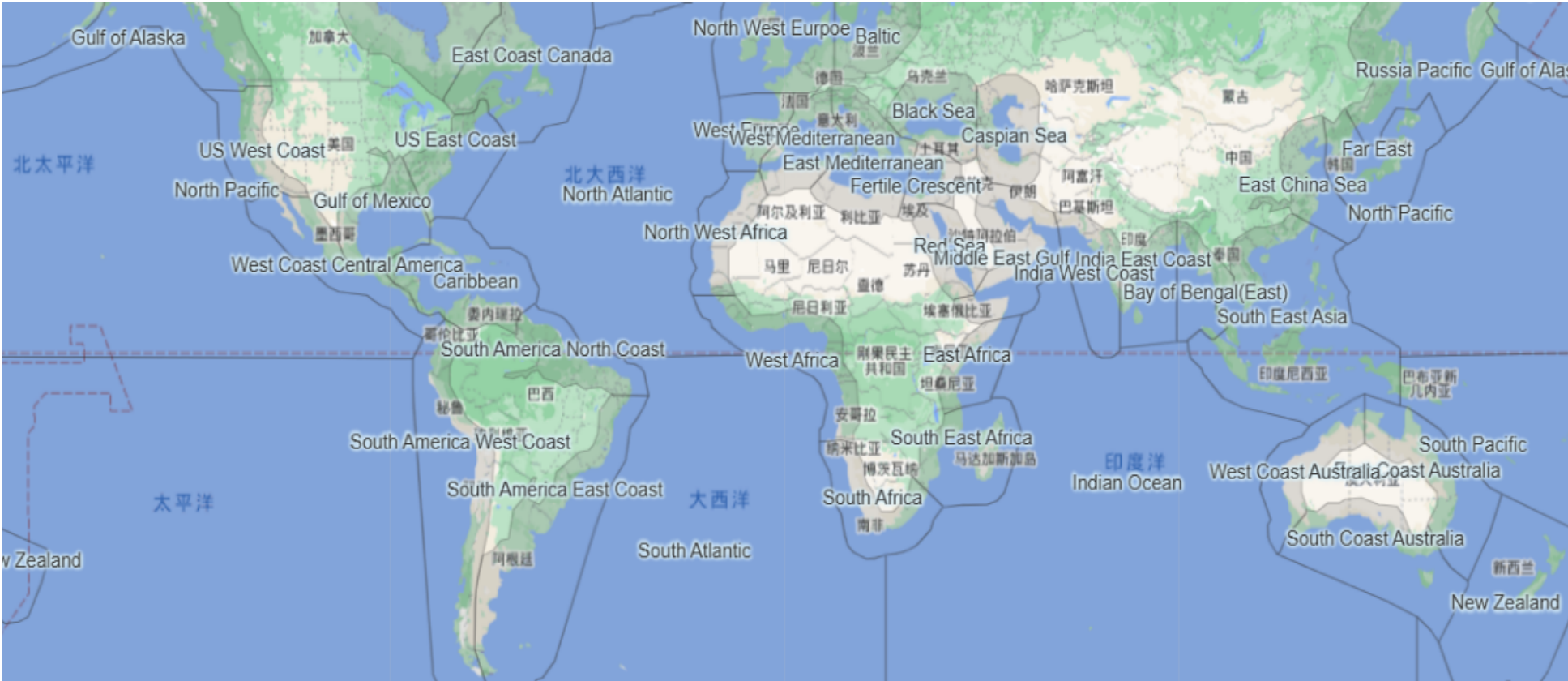


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1036	-24.0	-2.26	17.33	8.48
BCTI	535	38.0	7.65	-15.35	-35.7
BLNG	5380	-690.0	-11.37	-21.59	-61.56
BLPG	5424	-468.0	-7.94	40.3	-58.91



第四部分 运力分布 SUPPLY DISTRIBUTION

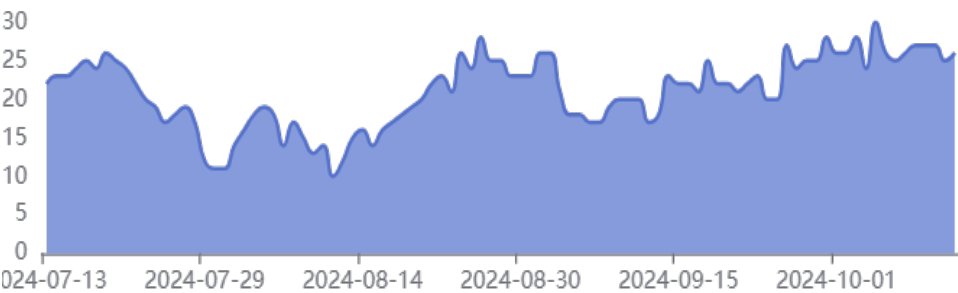


好望角型散货船 Capesize

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	25	26	27	27	27	25	26



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.

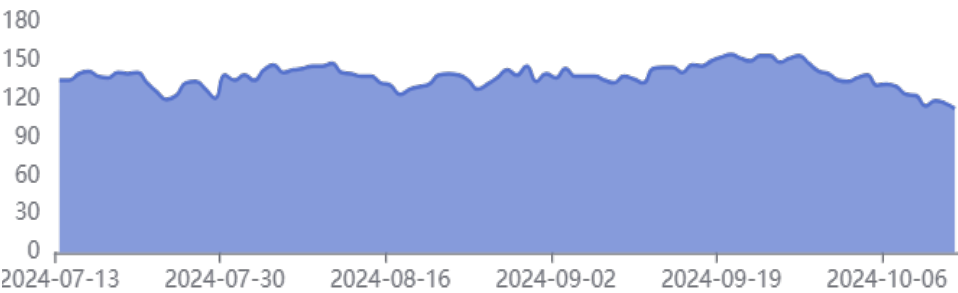
Type	M	T	W	Th	F	Sat	Sun
Cape	24	23	23	23	24	27	26

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.

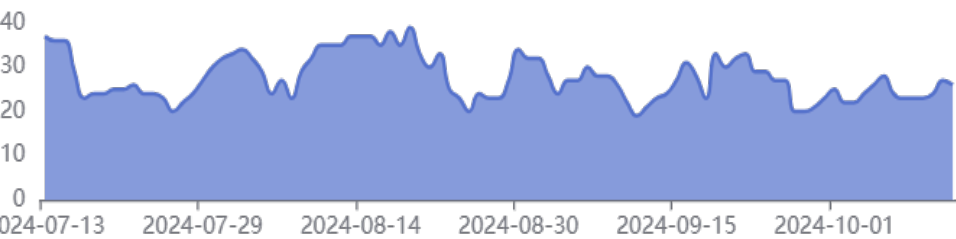
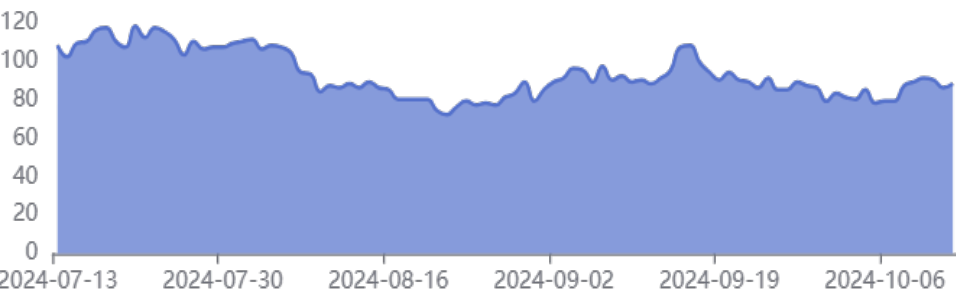
Type	M	T	W	Th	F	Sat	Sun
Pan.	129	123	122	114	118	116	112



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.

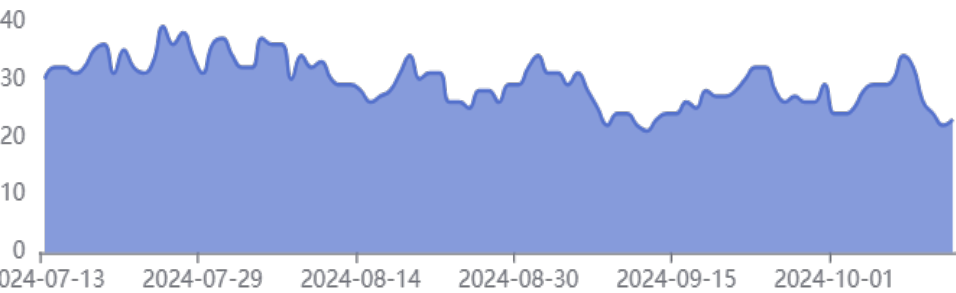
Type	M	T	W	Th	F	Sat	Sun
Cape	79	87	89	91	90	86	88



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.

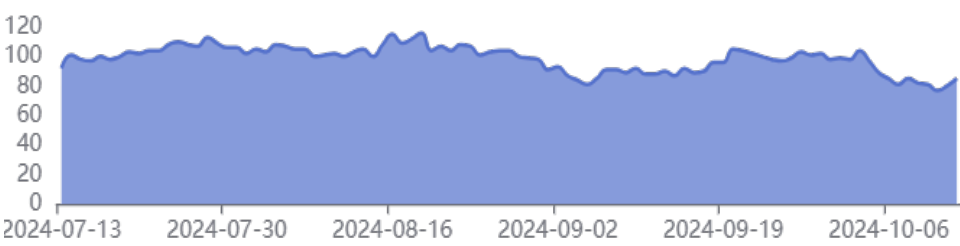
Type	M	T	W	Th	F	Sat	Sun
Pan.	24	24	25	24	24	23	19



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.	81	85	82	81	77	80	85

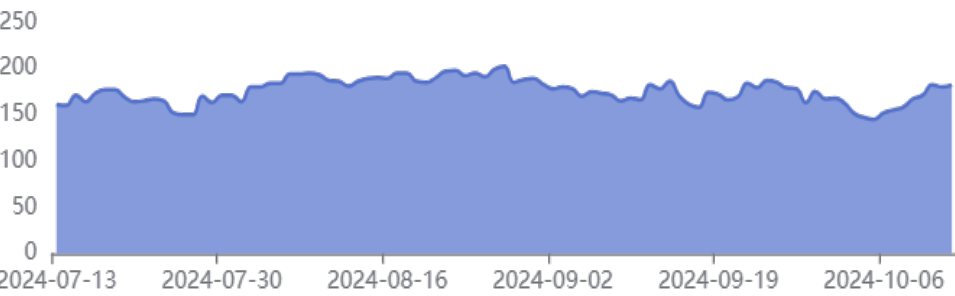


超大灵便型散货 SUPRAMAX

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.

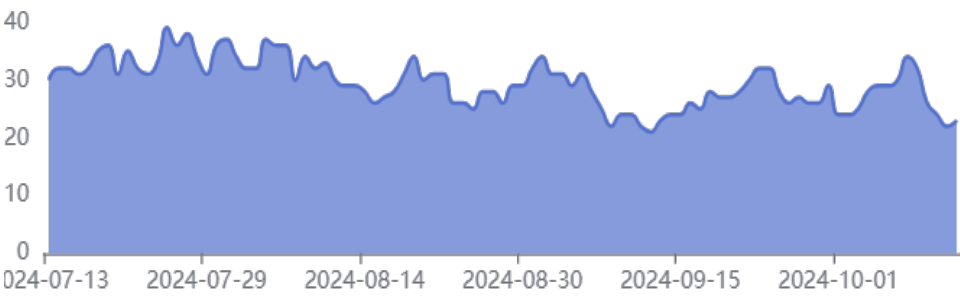
Type	M	T	W	Th	F	Sat	Sun
SMX	155	158	167	171	182	180	182



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.

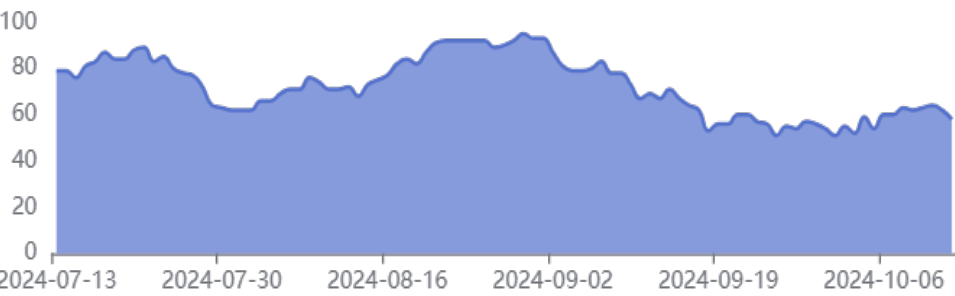
Type	M	T	W	Th	F	Sat	Sun
SMX	30	34	32	26	24	22	23



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.

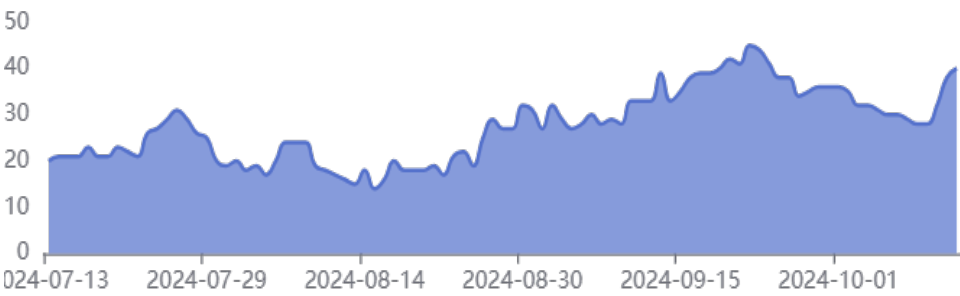
Type	M	T	W	Th	F	Sat	Sun
SMX	30	29	28	28	32	38	40



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.

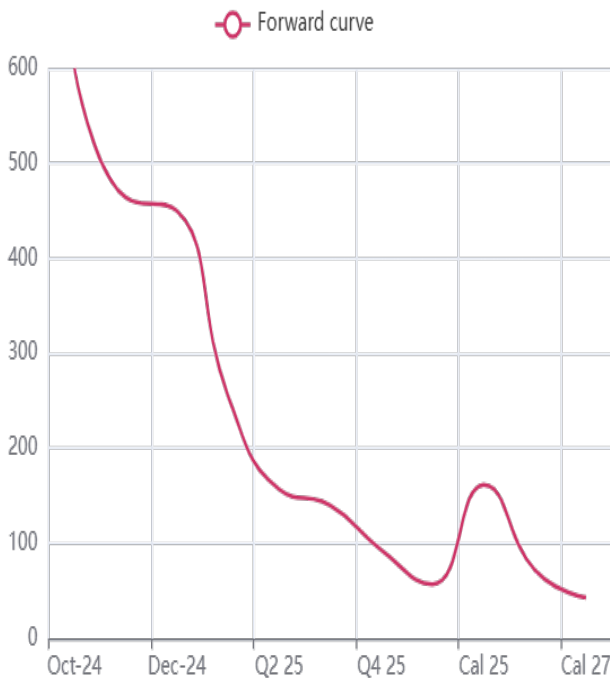
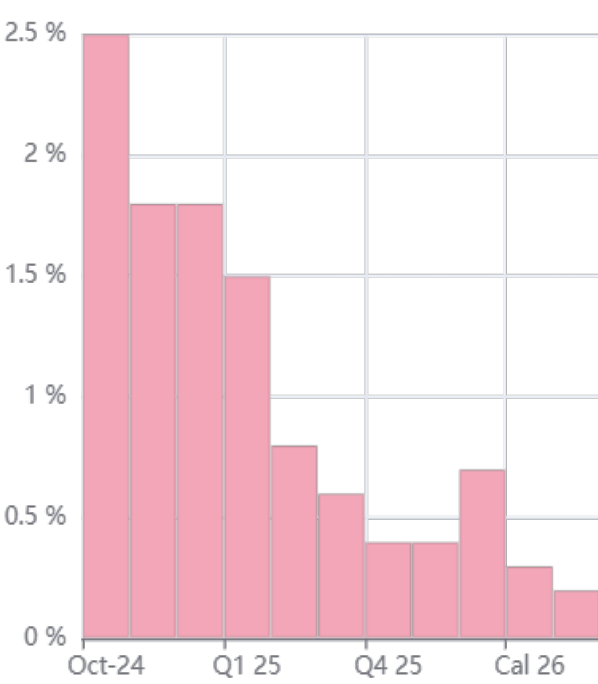
Type	M	T	W	Th	F	Sat	Sun
SMX	60	63	62	63	64	62	58



第五部分 远期运价协议 FFA

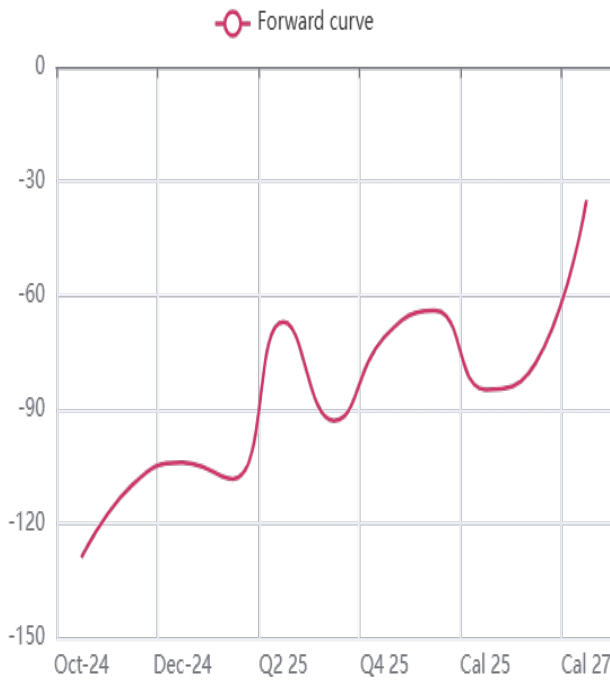
好望角型散货船Capesize

5TC	\$/day	WoW	
Oct-24	24,914.00	600.0	2.5 %
Nov-24	26,132.00	464.0	1.8 %
Dec-24	26,111.00	450.0	1.8 %
Q1 25	17,396.33	255.67	1.5 %
Q2 25	20,743.00	157.0	0.8 %
Q3 25	24,761.00	140.0	0.6 %
Q4 25	24,961.00	93.0	0.4 %
Q1 26	15,093.00	57.0	0.4 %
Cal 25	21,965.33	161.42	0.7 %
Cal 26	20,968.00	72.0	0.3 %
Cal 27	20,557.00	43.0	0.2 %



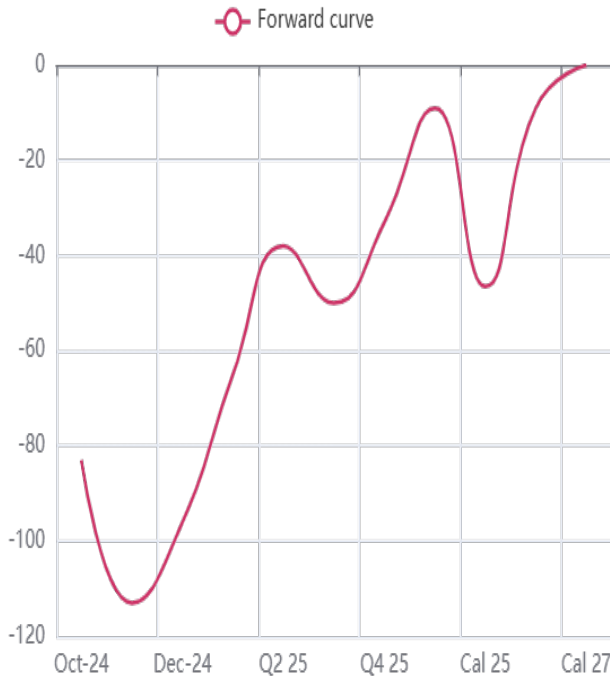
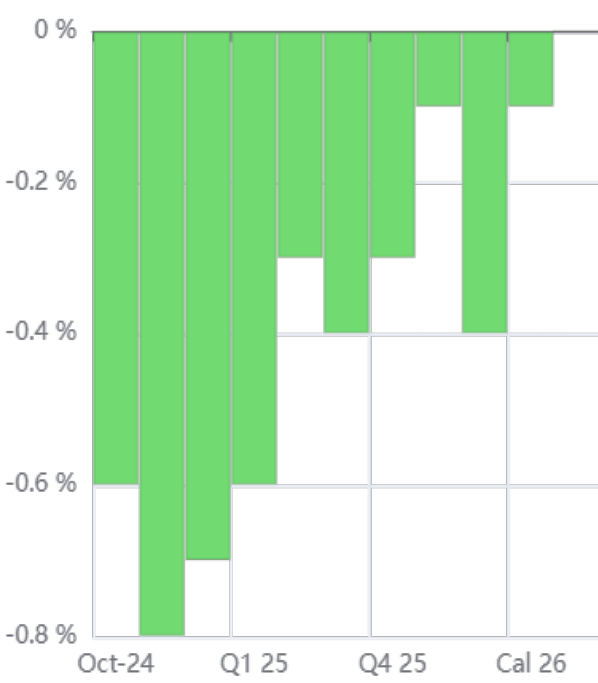
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Oct-24	11,707.00	-129.0	-1.1 %
Nov-24	12,254.00	-110.0	-0.9 %
Dec-24	12,425.00	-104.0	-0.8 %
Q1 25	10,946.33	-108.33	-1.0 %
Q2 25	12,804.00	-67.0	-0.5 %
Q3 25	12,850.00	-93.0	-0.7 %
Q4 25	12,679.00	-71.0	-0.6 %
Q1 26	11,018.00	-64.0	-0.6 %
Cal 25	12,319.83	-84.83	-0.7 %
Cal 26	12,079.25	-77.75	-0.6 %
Cal 27	12,161.00	-35.0	-0.3 %



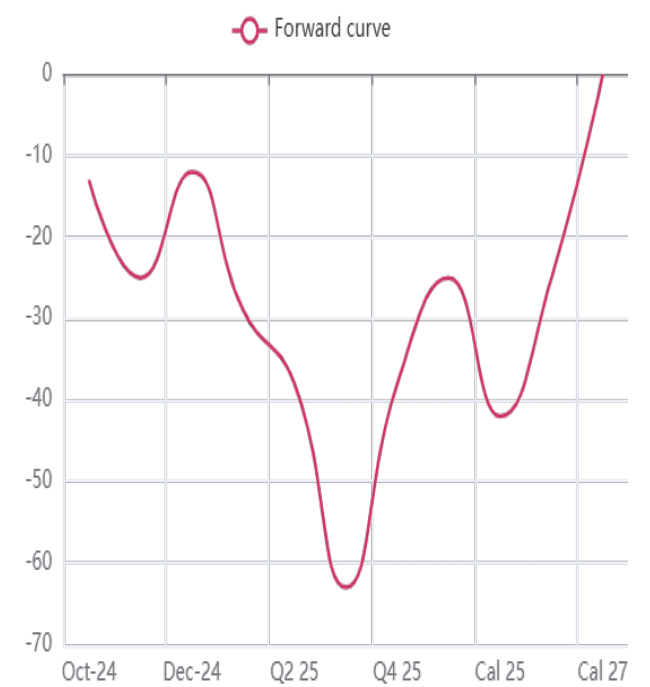
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Oct-24	13,850.00	-83.0	-0.6 %
Nov-24	13,650.00	-113.0	-0.8 %
Dec-24	13,667.00	-96.0	-0.7 %
Q1 25	11,665.67	-65.0	-0.6 %
Q2 25	13,229.00	-38.0	-0.3 %
Q3 25	13,200.00	-50.0	-0.4 %
Q4 25	12,892.00	-33.0	-0.3 %
Q1 26	12,383.00	-9.0	-0.1 %
12,746.67	Cal 25	-46.5	-0.4 %
Cal 26	12,383.00	-9.0	-0.1 %
Cal 27	12,342.00	0.0	0.0 %



灵便型散货船Handysize

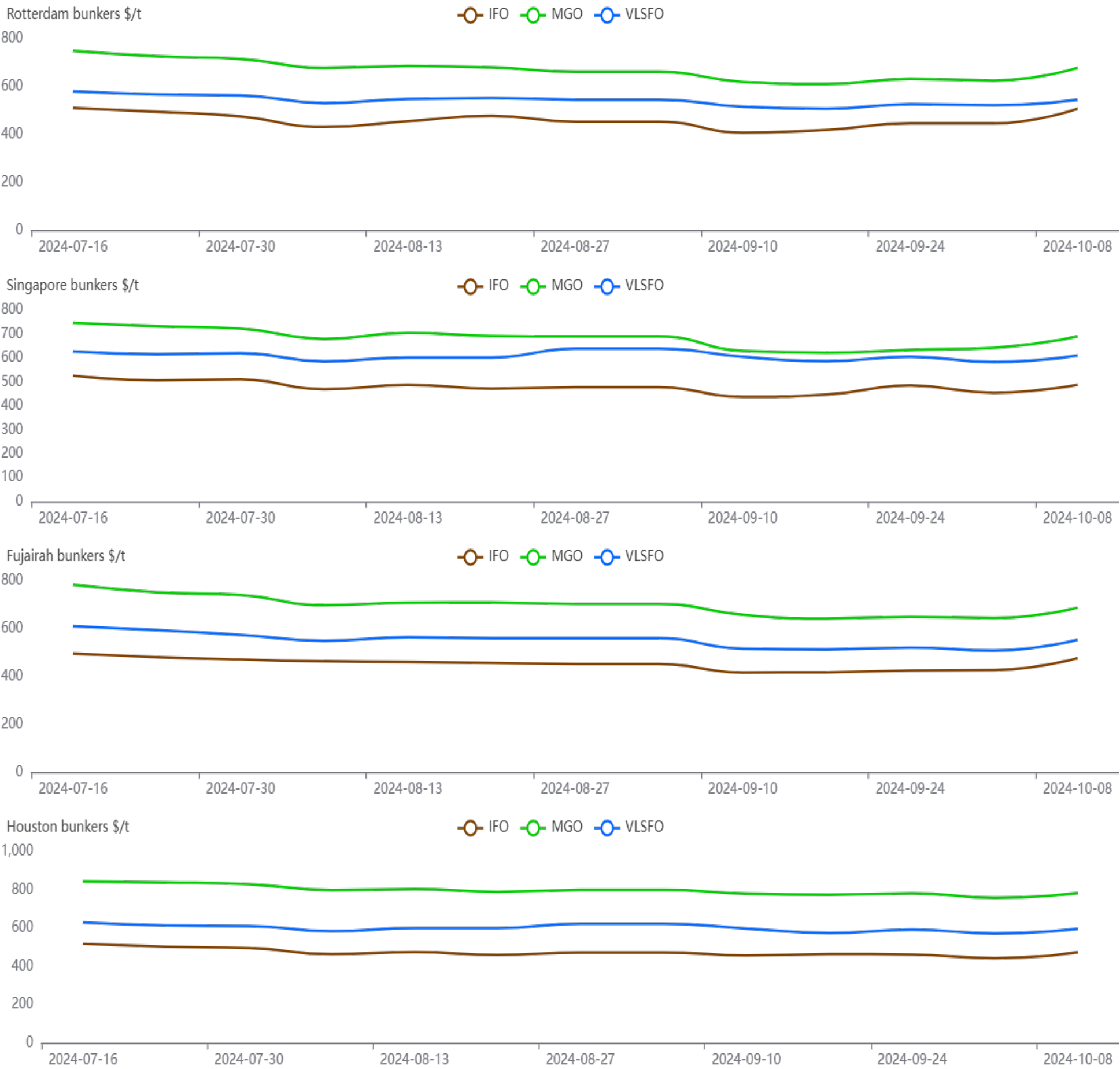
7TC	\$/day	WoW	
Oct-24	12,950.00	-13.0	-0.1 %
Nov-24	12,925.00	-25.0	-0.2 %
Dec-24	12,913.00	-12.0	-0.1 %
Q1 25	10,787.67	-29.0	-0.3 %
Q2 25	12,375.00	-38.0	-0.3 %
Q3 25	12,150.00	-63.0	-0.5 %
Q4 25	11,825.00	-38.0	-38.0
Q1 26	11,500.00	-25.0	-0.2 %
Cal 25	11,784.42	-42.0	-0.4 %
Cal 26	11,500.00	-25.0	-0.2 %
Cal 27	11,488.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	631.0	491.0	692.0	140.0	-1.5	-1.06	-14.11
Singapore	610.0	488.0	690.0	122.0	-6.5	-5.06	-27.16
Rotterdam	545.0	508.0	678.5	37.0	-39.0	-51.32	-65.74
Fujairah	554.0	476.5	687.5	77.5	-4.5	-5.49	-22.11
Houston	596.5	473.0	782.5	123.5	-6.0	-4.63	-12.1

(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	211.0		-2.0	-0.94	3.43	-5.63
Maize	222.0		-1.0	-0.45	5.71	-8.46
Soybeans	218.0		-2.0	-0.91	1.87	-11.01
Rice	225.0		-1.0	-0.44	-7.41	-11.73
Barley	220.0		-1.0	-0.45	7.84	-2.99
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	75.61	1.23	1.65	14.25	-16.92
Brent	USD/Bbl	79.39	1.34	1.72	14.1	-14.24
Natural Gas	USD/MMBtu	2.76	-0.09	-3.16	23.77	-6.12
Gasoline	USD/Gal	2.12	0.03	1.44	12.77	-12.03
Heating Oil	USD/Gal	2.34	0.02	0.86	13.59	-29.73
Ethanol	USD/Gal	1.6	0.04	2.56	-6.98	-31.91
Naphtha	USD/T	684.61	15.51	2.32	11.78	-2.23
Propane	USD/Gal	0.8	0.02	2.56	25.0	8.11
Uranium	USD/Lbs	82.85	0.35	0.42	4.15	18.36
Methanol	CNY/T	2501.0	0.0	0.0	6.43	1.01
TTF Gas	EUR/MWh	39.69	-1.05	-2.58	11.61	-2.6
UK Gas	GBp/thm	99.67	-2.31	-2.27	16.74	-3.37
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.38	-0.14	-3.1	7.88	18.06
Coal	USD/T	153.0	3.4	2.27	10.27	-4.43
Steel	CNY/T	3370.0	-47.0	-1.38	14.12	-8.17
Iron Ore	USD/T	112.39	3.55	3.26	22.48	-5.95
Aluminum	USD/T	2587.0	-81.0	-3.04	10.13	9.29
Lithium	CNY/T	75500.0	0.0	0.0	5.59	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2632.71	-20.04	-0.76	4.43	43.08
Silver	USD/t.oz	31.06	-1.12	-3.48	8.79	42.87
Platium	null	958.8	N/A	N/A	N/A	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.1		0.0	0.0	0.0	3.77
USD/CNY	7.05		-0.05	-0.7	-0.98	-3.42

第八部分 本周话题 WEEKLY TOPIC



海员因停靠克里米亚港口而面临5年监禁

一艘小型杂货船违反乌克兰法律访问了俄罗斯占领的塞瓦斯托波尔，因此该船于2024年7月初在多瑙河附近的乌克兰港口Reni港被港口当局所扣押。

克里米亚是黑海北岸一个几乎被海洋包围的半岛，位于乌克兰国土主体之南，俄罗斯国土主体以西，面积约2.7万平方公里。2014年3月18日后，俄罗斯事实上接管了乌克兰的克里米亚领土，建立了克里米亚联邦管区，下设两个联邦主体，即克里米亚共和国和塞瓦斯托波尔。

据HiFleet船舶档案显示，这艘被扣押的船舶是一艘42年船龄2850载重吨的杂货船，于1982年某比利时造船厂建造，船名USKO MFU，信息显示该船的经营公司和技术管理公司都来自某土耳其公司，该船最终收益人没有披露。

9月25号，乌克兰当局以该船违法其禁止克里米亚贸易相关法律起诉了船上的船长和二副，他们可能将面临最高5年的监禁，这艘船的船长是一名阿塞拜疆公民，二副身份没有披露，当这艘船舶7月份挂靠乌克兰港口时，这位阿塞拜疆的船长正在指挥这艘船舶。

乌克兰基辅政府誓言要起诉所有与克里米亚和新被俄罗斯控制的黑海港口进行贸易的船舶，有些黑海港口是在俄罗斯2022年2月24号入侵乌克兰后被莫斯科所控制，一些占领区的粮食从这些港口发运。

虽然有乌克兰基辅颁布的法律，然而市场永远是追逐高风险收益，即使面临制裁或者被定罪的可能，这些被占领区黑海的港口依然在出口粮食，乌克兰当局对这种贸易几乎无能为力。在高收益的驱动下，来自俄罗斯占领地区的粮食被不断出售，运往世界其它地区，主要运输方向是中东，这种贸易一直在蓬勃发展，因为超级便宜的价格。

根据相关信息，乌克兰当局指控该船于2023年11月在塞瓦斯托波尔装载了几千吨农产品运往了土耳其，违法了其法律禁令，从而对该船实施滞留和对相关船员提出指控。

今年5月底，相关信息来源说这艘船在关闭AIS系统的情况下，再次停靠塞瓦斯托波尔，卸载了一船来自土耳其的未指明货物。

船员一般听从船东的指挥，对于挂靠一些特别敏感港口或区域有时因为信息闭塞而不知，如果船员不知而不幸获刑，这将引起航运界的关注。

A small general cargo ship visited the Russian-occupied Sevastopol in violation of Ukrainian law, and as a result the ship was seized by the port authorities in the Ukrainian port of Reni near the Danube River in early July 2024.

Crimea is a peninsula almost surrounded by the sea on the northern coast of the Black Sea, south of the main part of Ukraine and west of the main part of Russia, covering an area of about 27,000 square kilometers. On March 18, 2014, Russia de facto took over the Ukrainian territory of Crimea, creating the Crimean Federal District with two federal subjects, namely the Republic of Crimea and Sevastopol.

According to HiFleet ship archives, the seized ship is a 42-year old 2,850 DWT general cargo ship, built in 1982 in a Belgian shipyard, the ship name USKO MFU, information shows that the ship's operating company and technical management company are from a Turkish company, the ship's final profit owner is not disclosed.

On September 25th Ukrainian authorities charged the ship's captain and second officer, who could face up to five years in prison, with violating its laws banning trade from Crimea. The captain, an undisclosed Azerbaijani citizen, was in command of the ship when it docked at a Ukrainian port in July.

The Ukrainian government in Kiev has vowed to prosecute all ships trading with Crimea and the newly Russian-controlled Black Sea ports, some of which were seized by Moscow after Russia invaded Ukraine on February 24, 2022, and which ship some of the grain from the occupied territories.

Despite the laws enacted in Kiev, Ukraine, the market is always chasing high risk returns, and even in the face of sanctions or the possibility of conviction, these Black Sea ports in the occupied territories continue to export grain, and there is little the Ukrainian authorities can do about this trade. Driven by high yields, grain from the Russian-occupied territories is constantly sold and shipped to other parts of the world, mainly to the Middle East, a trade that has been booming because of super-cheap prices.

According to the relevant information, the Ukrainian authorities accused the ship of carrying thousands of tons of agricultural products to Turkey in Sevastopol in November 2023, in violation of its legal ban, resulting in the detention of the ship and the charges against the crew involved.

At the end of May, sources said the ship docked again in Sevastopol with its AIS system off to unload an unspecified cargo from Turkey.

The crew generally follows the command of the shipowner, and sometimes does not know about the docking of some particularly sensitive ports or areas because of blocked information. If the crew does not know and is unfortunately punished, this will cause the concern of the shipping industry.

刘红太