



2024年 第42周市场周报

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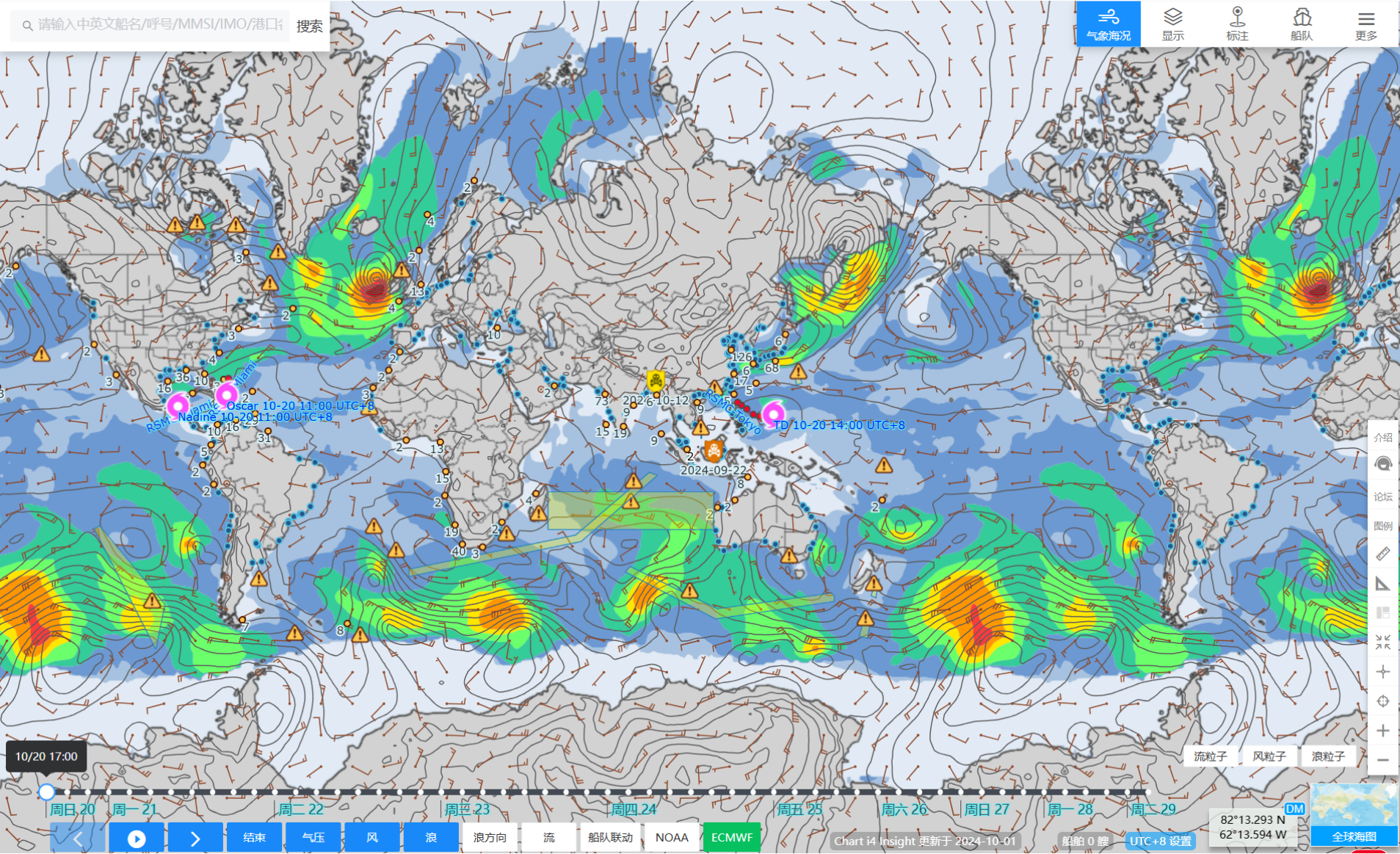
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最新商品价格 LATEST COMMODITIES PRICE

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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818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 818 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3-4级，相关海域轻浪；黄海风力4-5级，相关海域中浪；东海风力从6级减弱到4级，相关海域中浪；台湾海峡风力将经历7-8级风，台湾海峡大浪；南海大部海域风力5-6级，中浪。The coming week the wind in Bohai Sea will stay gentle with light sea. 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 will experience gale with rough wave. In most of the South China Sea the wind will be strong with moderate wave there.

海盗事件 Piracy

10月12号，孟加拉库图布迪亚锚地。一艘停泊的散货船上的值班船员注意到前甲板上两名未获授权人士，便发出警报，这两名人士与另外10名从犯乘小船逃离。经过检查，船员发现前方的仓库被闯入，船上的物品和财产被盗。在前甲板附近睡觉的装卸工人的手机也被盗。12.10.2024: 1948 UTC: Posn: 21:48.70N – 091:47.10E, Kutubdia Anchorage, Bangladesh. Local watchman onboard an anchored bulk carrier noticed two unauthorised persons on the forward deck and raised the alarm resulting in the persons escaping in small boats with a further 10 accomplices. Upon inspection the crew noticed the forward stores were broken into and ship's stores and property stolen. Mobile phones of stevedores asleep near the forward deck were also stolen.

海上事件 Marine Incidents

10月20号，伊朗当局正在处理距离其主要原油出口码头6.4公里处的漏油事件。伊朗伊斯兰共和国通讯社（IRNA）表示，这起事件发生在哈尔克岛（Kharg Island）附近。伊朗通讯社援引一名当地官员的话说，石油来自海底管道，已经采取了“必要的行动”。IRNA补充说：“无人机已经确定了另外两个地点。”报道称，已经启动了阻止污染扩散的程序。伊朗大约90%的石油出口都是从这个码头运出的。On October 20, Iranian authorities were dealing with an oil spill 6.4 kilometers from its main crude export terminal. Iran's IRNA news agency said the incident took place near Kharg Island. Irna quoted a local official as saying the oil came from an undersea pipeline and that "necessary actions" had been taken. "Two other locations have been identified by drones," IRNA added. Procedures have been launched to stop the spread of pollution, the report said. About 90 percent of Iran's oil exports are shipped from the terminal.

其它 Others

没有 Nil

备注 Remark

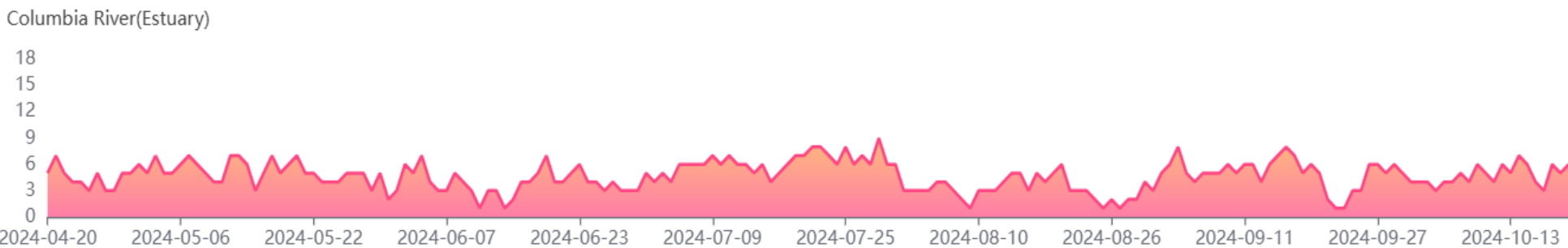
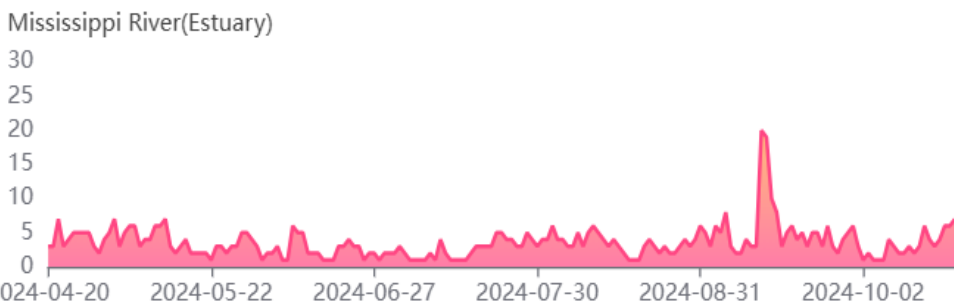
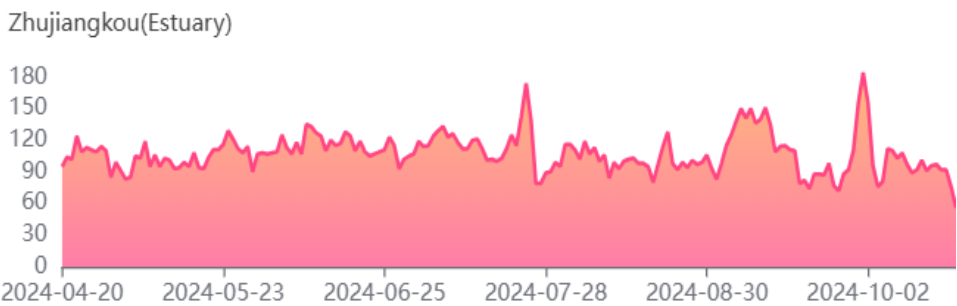
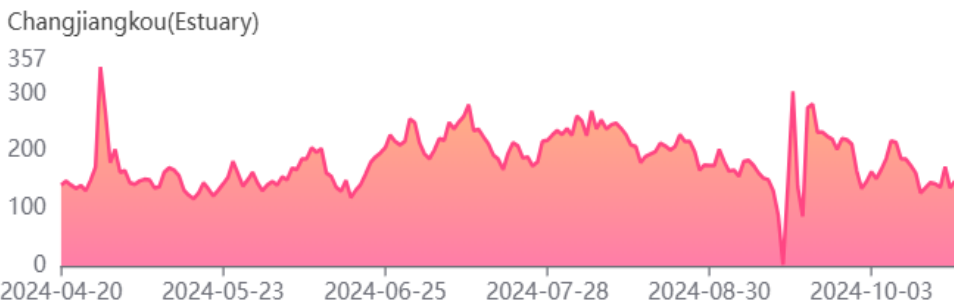
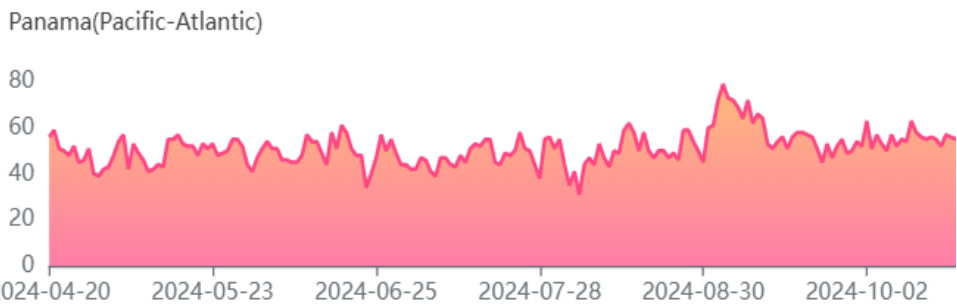
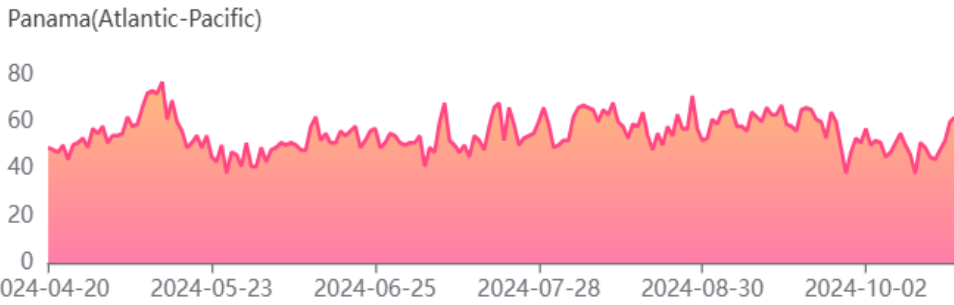
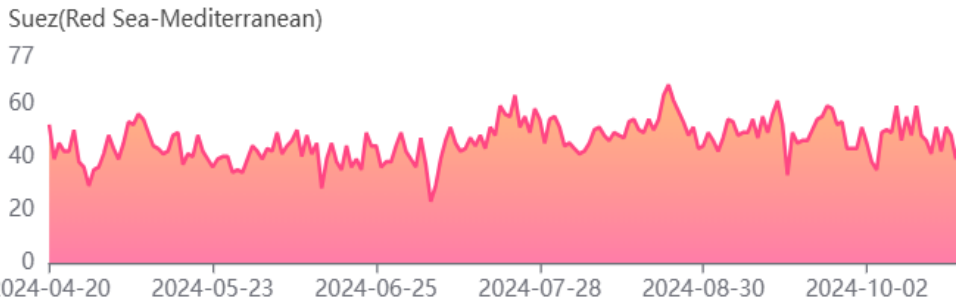
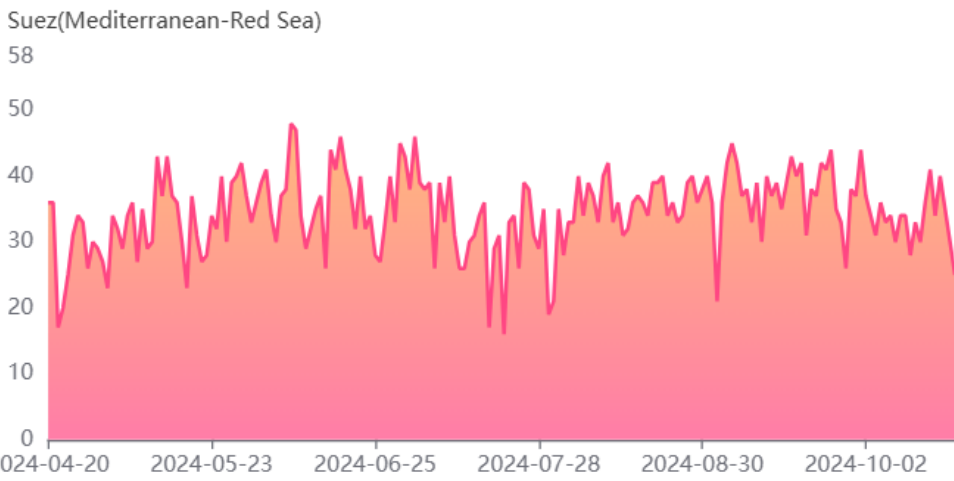
本报告数据截止时间为2024年10月20日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Oct 20th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	39	1410	-48	-20
Miss.Riv.	7	103	19	-53
CJK	148	5176	-312	286
Pa.Atlan.	62	1489	28	-281
Colum.Riv.	6	131	3	-1
Suez.Med.	25	1012	15	-68
Pa.Pac.	55	1563	-3	-165
ZJK	56	2871	-111	-350

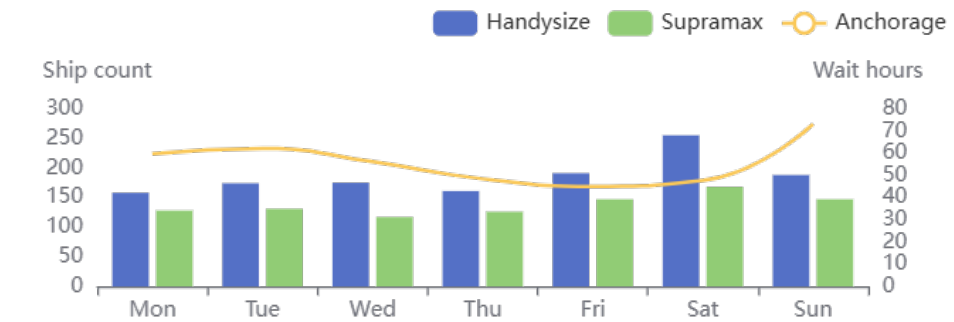


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

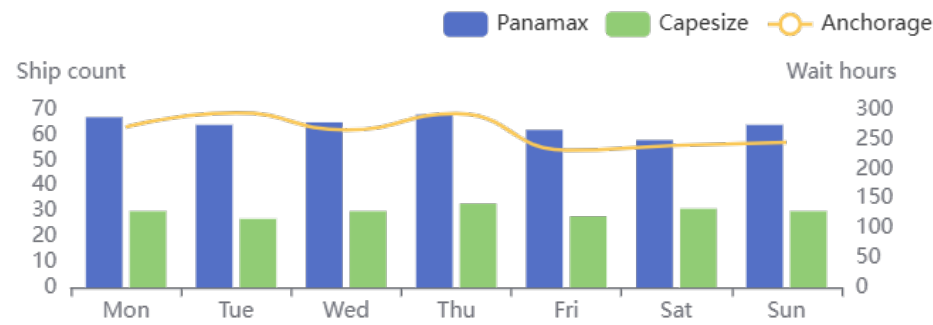
Type	M	T	W	Th	F	Sat	Sun
HDY	158	174	175	161	191	255	188
SMX	128	131	117	126	147	168	147
WT.h.	59.7	62.1	56.1	48.4	45	47.7	73



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

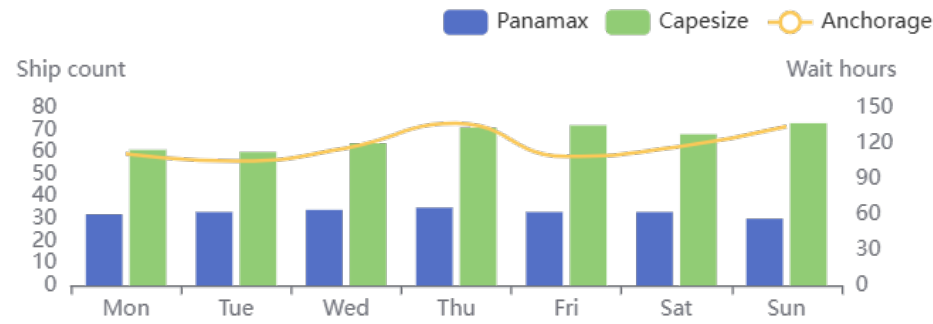
Type	M	T	W	Th	F	Sat	Sun
Pan.	67	64	65	68	62	58	64
Cap	30	27	30	33	28	31	30
WT.h.	270.9	294.9	265.6	293.3	231.5	239.7	245



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

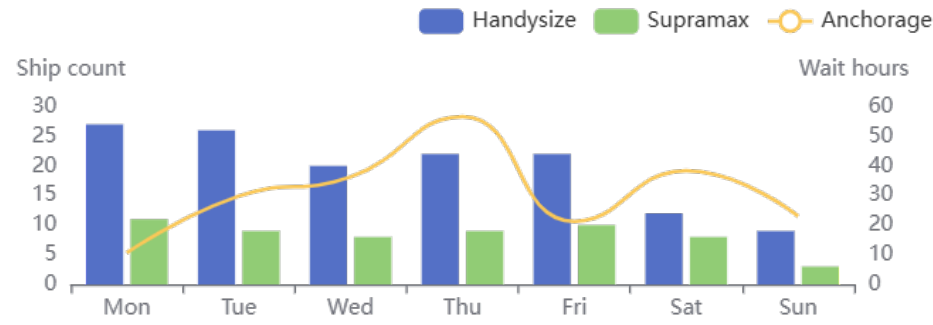
Type	M	T	W	Th	F	Sat	Sun
Pan.	32	33	34	35	33	33	30
Cap	61	60	64	71	72	68	73
WT.h.	110.9	104.9	115.9	136.7	108.8	116.8	134



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

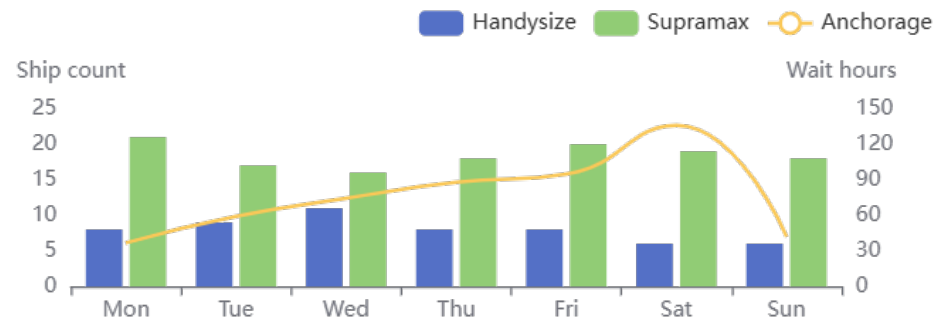
Type	M	T	W	Th	F	Sat	Sun
HDY	27	26	20	22	22	12	9
SMX	11	9	8	9	10	8	3
WT.h.	10.7	29.8	36.3	56.6	21.3	38.35	23



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

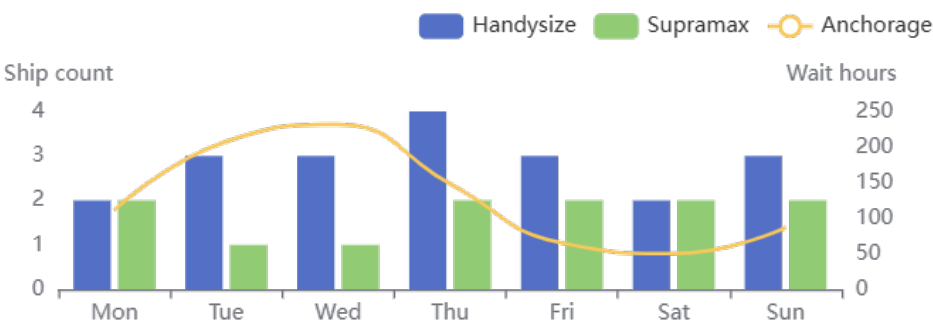
Type	M	T	W	Th	F	Sat	Sun
HDY	8	9	11	8	8	6	6
SMX	21	17	16	18	20	19	18
WT.h.	36.7	59.2	74.4	88	94.7	136	42



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

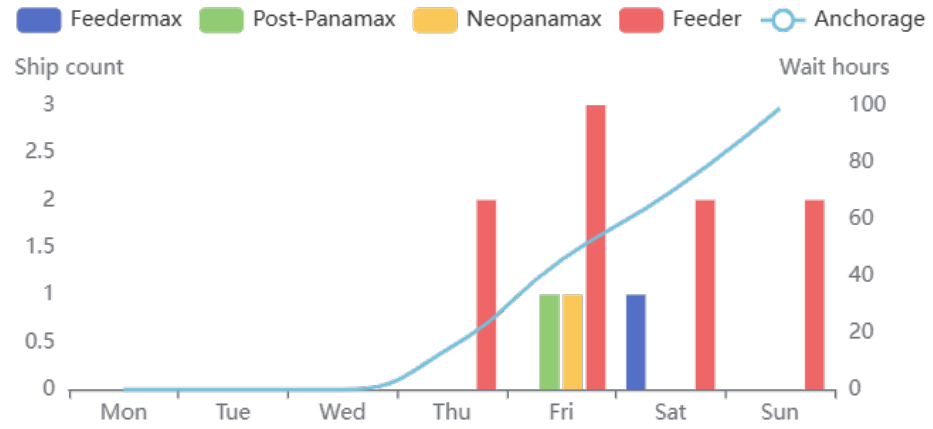
Type	M	T	W	Th	F	Sat	Sun
HDY	2	3	3	4	3	2	3
SMX	2	1	1	2	2	2	2
WT.h.	111.7	208.1	232.1	148.7	65.3	50.35	87



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

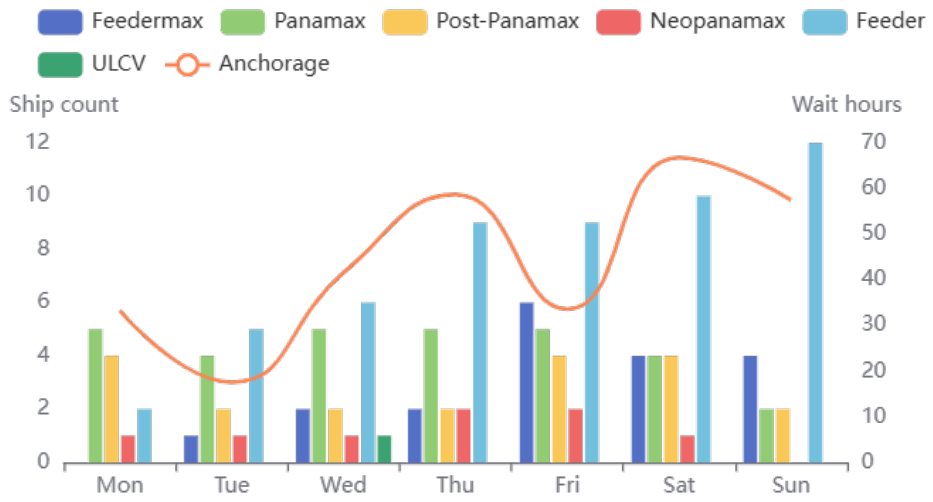
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	1	0
Pan.	0	0	0	0	0	0	0
PPx	0	0	0	0	1	0	0
NPx	0	0	0	0	1	0	0
Fd	0	0	0	2	3	2	2
WT.h.	0.0	0.0	0.0	15.05	45.5	69.5	99
Ulcw	0	0	0	0	0	0	0



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

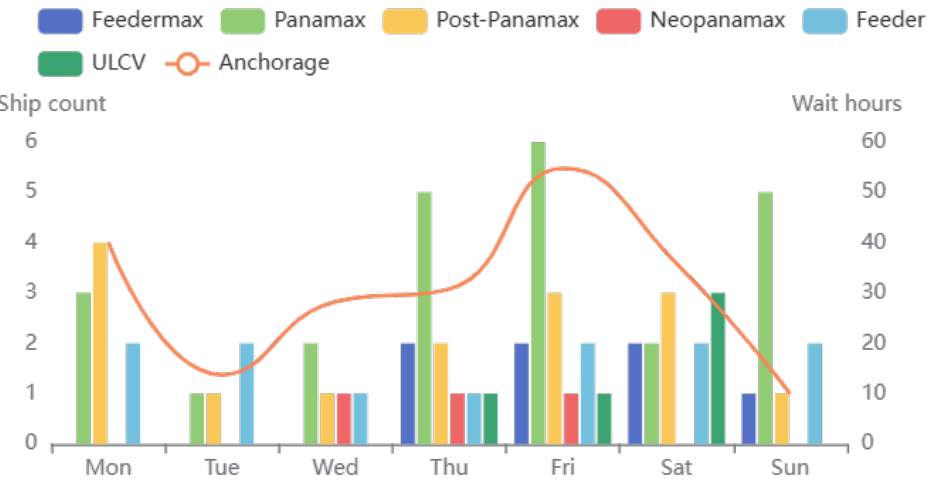
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	1	2	2	6	4	4
Pan.	5	4	5	5	5	4	2
PPx	4	2	2	2	4	4	2
NPx	1	1	1	2	2	1	0
Fd	2	5	6	9	9	10	12
Ulcw	0	0	1	0	0	0	0
WT.h.	33.25	17.6	41.6	58.7	33.6	66.8	57.5



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

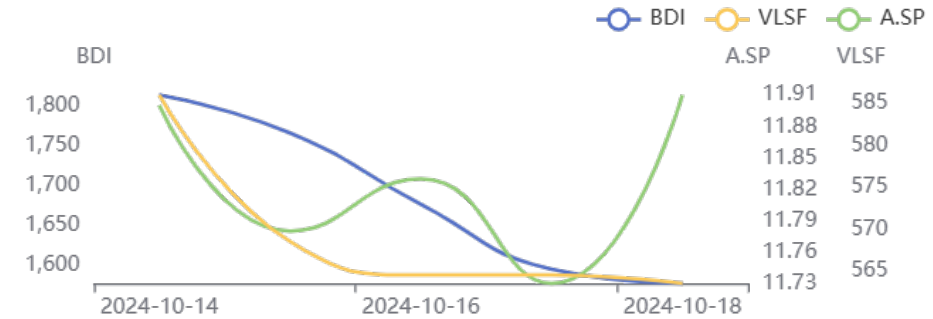
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	2	2	2	1
Pan.	3	1	2	5	6	2	5
PPx	4	1	1	2	3	3	1
NPx	0	0	1	1	1	0	0
Fd	2	2	1	1	2	2	2
Ulcw	0	0	0	1	1	3	0
WT.h.	40.1	13.8	28.3	30.8	54.8	35.9	10



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

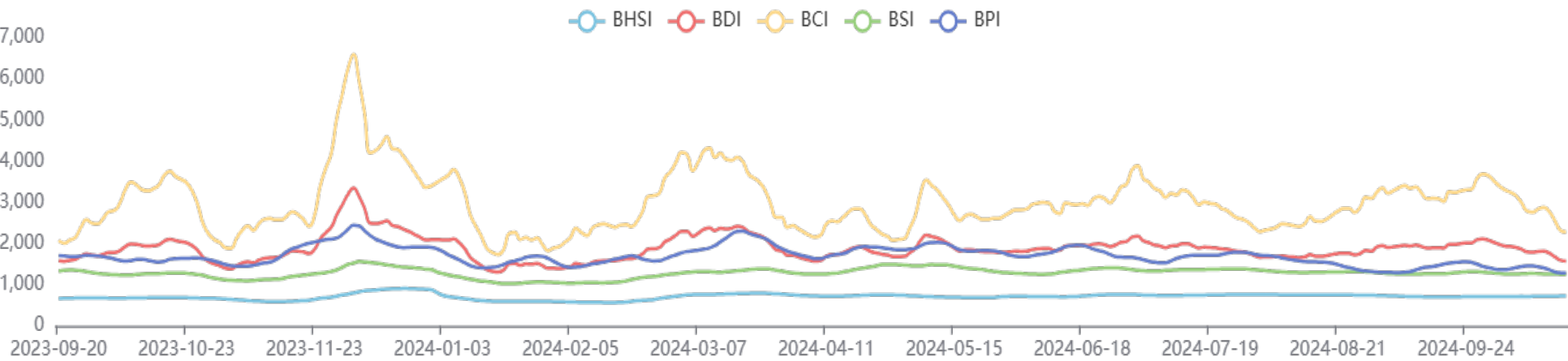
Type	M	T	W	Th	F	Sat	Sun
BDI	1409	1364	1309	1288	1285		
VLSF	586.00	568.50	564.50	564.50	563.50		
A.SP	11.9	11.78	11.83	11.73	11.91	11.92	



第三部分 航运市场 SHIPPING MARKET

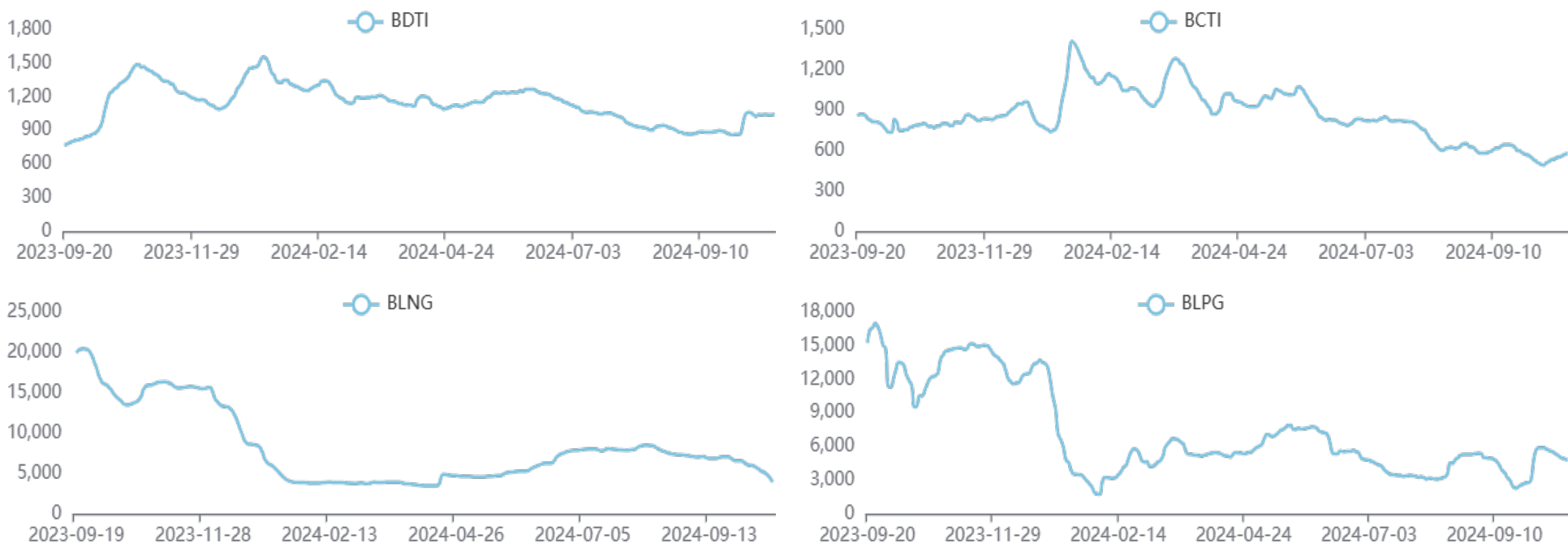
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1576	-233.0	-12.88	-20.28	-25.13
BCI	2276	-559.0	-19.72	-29.64	-39.29
BPI	1285	-150.0	-10.45	-16.45	-20.63
BSI	1250	-19.0	-1.5	-3.03	-2.72
BHSI	727	9.0	1.25	2.83	5.21



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1043	7.0	0.68	16.67	-18.0
BCTI	580	45.0	8.41	-7.64	-23.28
BLNG	3940	-1440.0	-26.77	-44.07	-71.25
BLPG	4777	-647.0	-11.93	109.43	-50.51



第四部分 运力分布 SUPPLY DISTRIBUTION

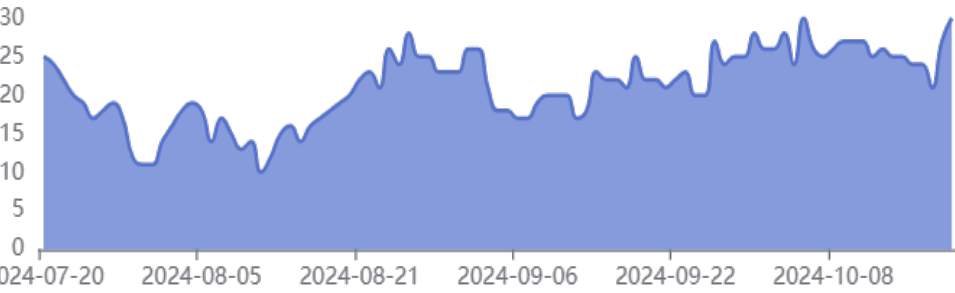


好望角型散货船 Capesize

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.

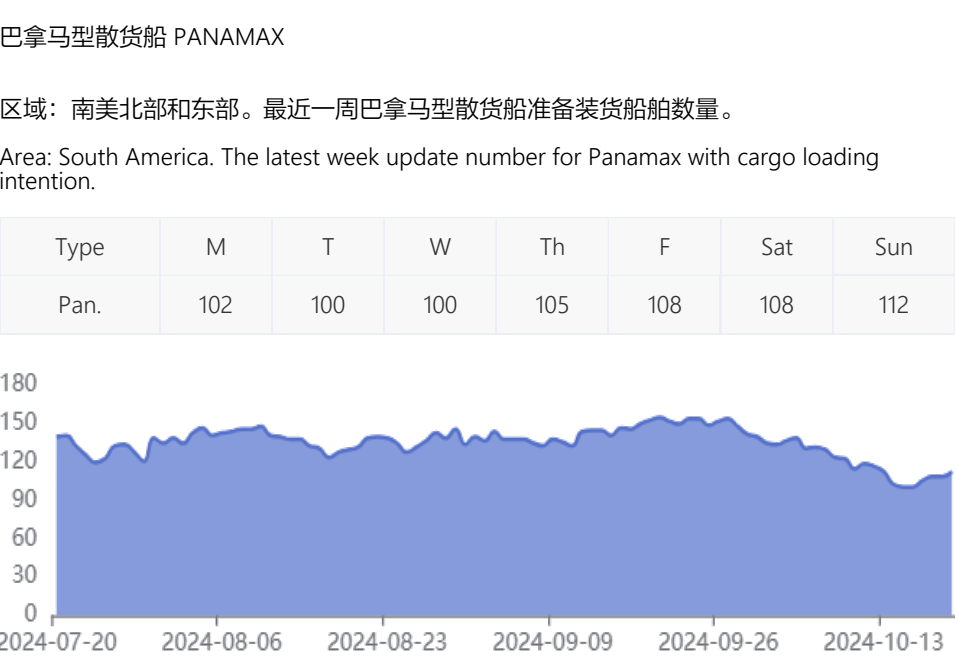
Type	M	T	W	Th	F	Sat	Sun
Cape	25	25	24	24	21	27	30



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.

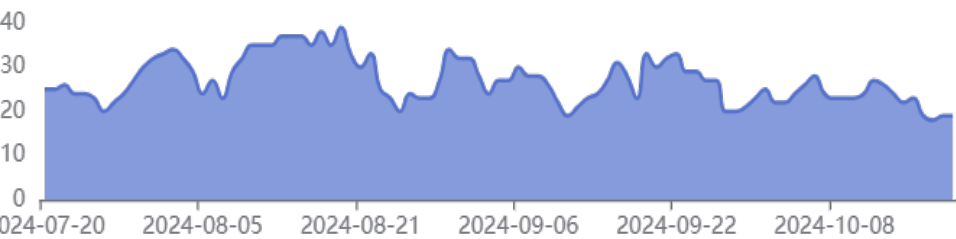
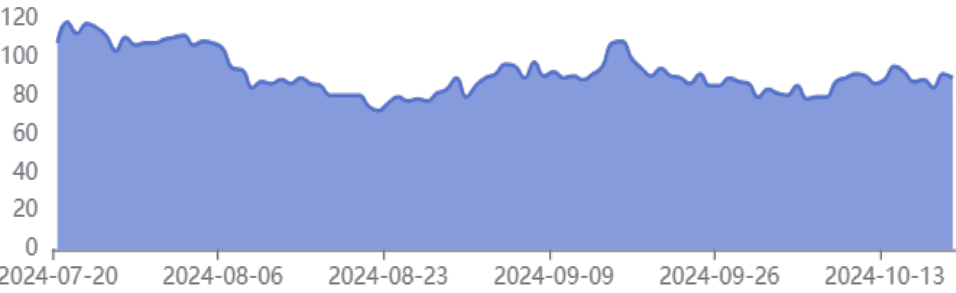
Type	M	T	W	Th	F	Sat	Sun
Cape	24	22	23	19	18	19	19



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	95	92	87	88	84	91	89

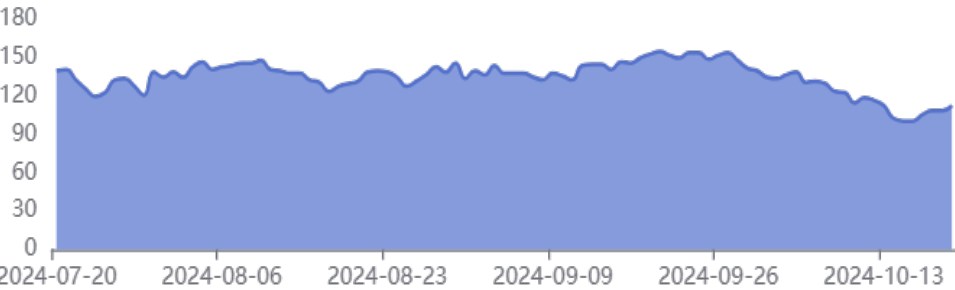


巴拿马型散货船 PANAMAX

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.

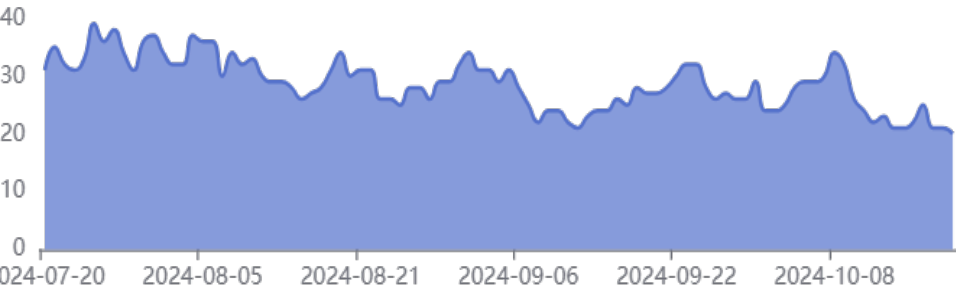
Type	M	T	W	Th	F	Sat	Sun
Pan.	102	100	100	105	108	108	112



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.

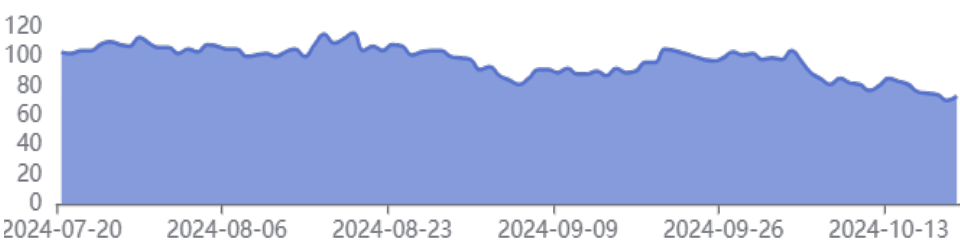
Type	M	T	W	Th	F	Sat	Sun
Pan.	18	18	19	19	17	15	13



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.	83	81	76	75	74	70	73

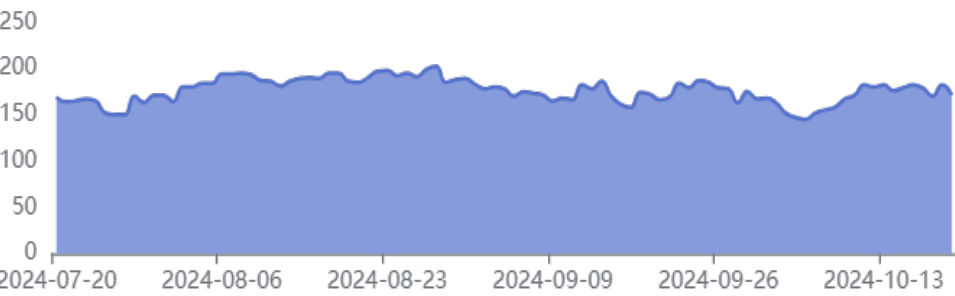


超大灵便型散货 SUPRAMAX

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.

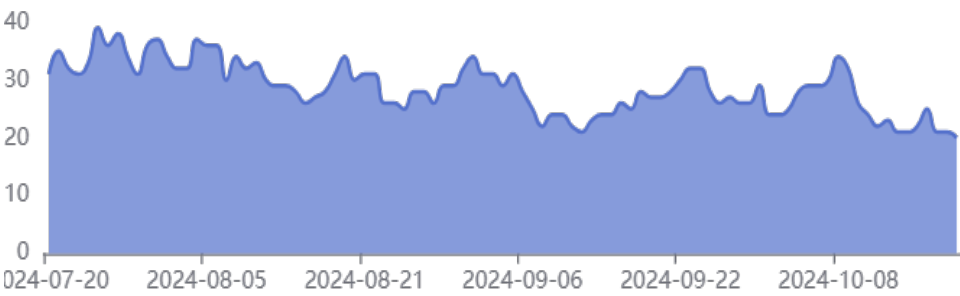
Type	M	T	W	Th	F	Sat	Sun
SMX	176	179	182	179	170	182	171



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.

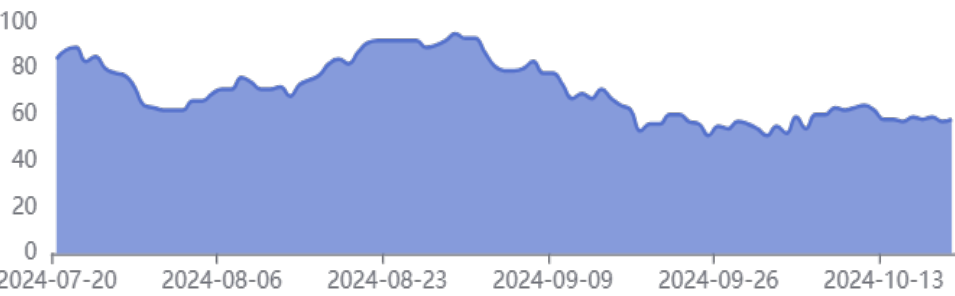
Type	M	T	W	Th	F	Sat	Sun
SMX	21	21	22	25	21	21	20



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.

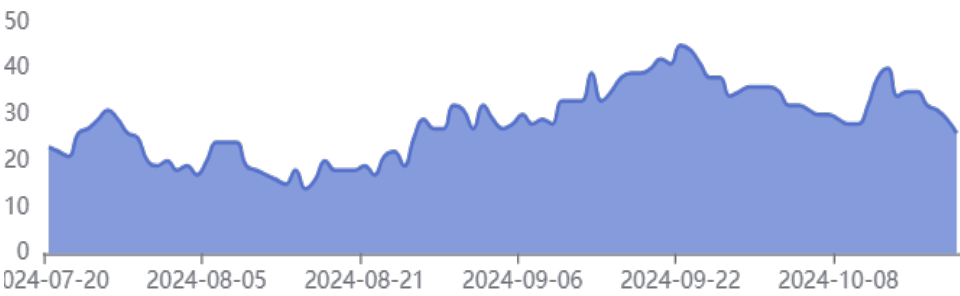
Type	M	T	W	Th	F	Sat	Sun
SMX	34	35	35	32	31	29	26



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.

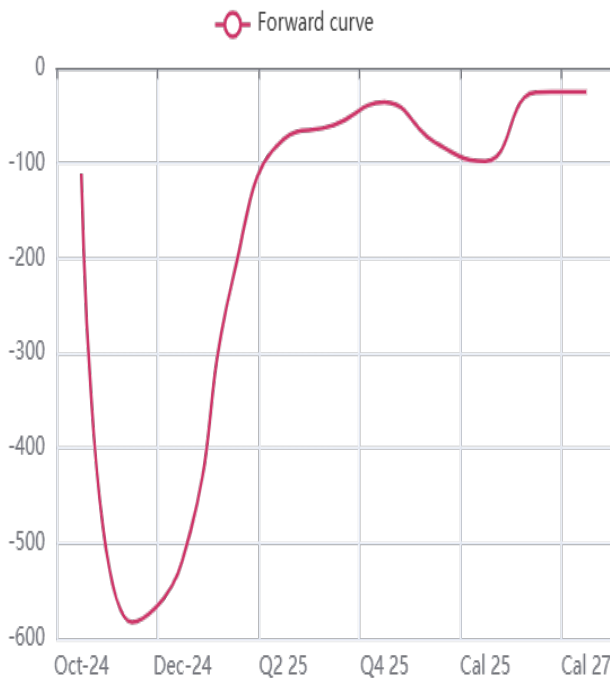
Type	M	T	W	Th	F	Sat	Sun
SMX	58	57	59	58	59	57	58



第五部分 远期运价协议 FFA

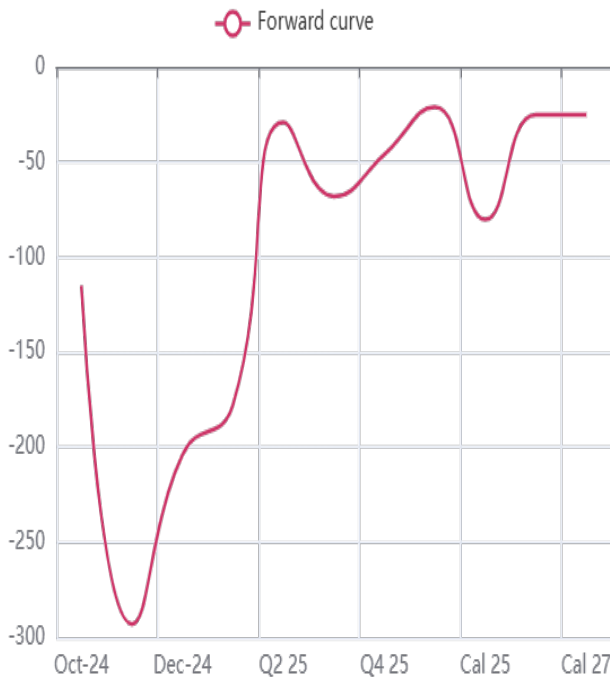
好望角型散货船Capesize

5TC	\$/day	WoW	
Oct-24	21,882.00	-111.0	-0.5 %
Nov-24	20,096.00	-583.0	-2.8 %
Dec-24	22,264.00	-518.0	-2.3 %
Q1 25	15,457.33	-221.33	-1.4 %
Q2 25	19,625.00	-75.0	-0.4 %
Q3 25	23,854.00	-60.0	-0.3 %
Q4 25	24,193.00	-36.0	-0.1 %
Q1 26	14,436.00	-78.0	-0.5 %
Cal 25	20,782.33	-98.08	-0.5 %
Cal 26	20,210.75	-25.5	-0.1 %
Cal 27	20,150.00	-25.0	-0.1 %



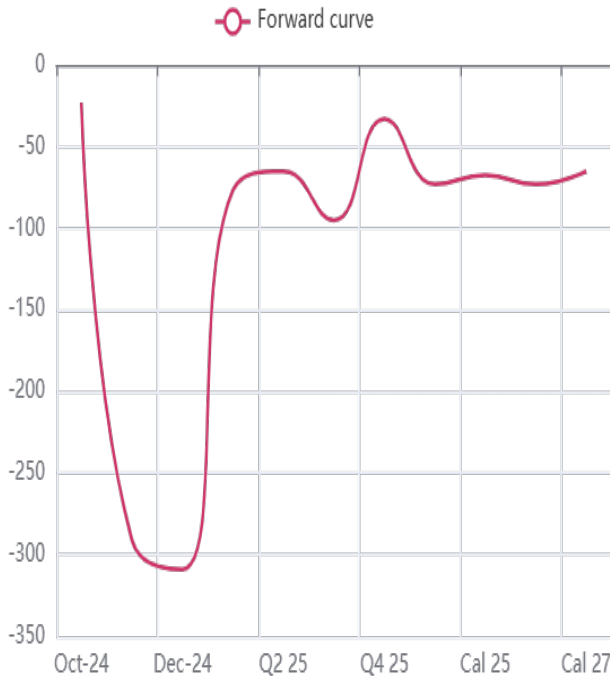
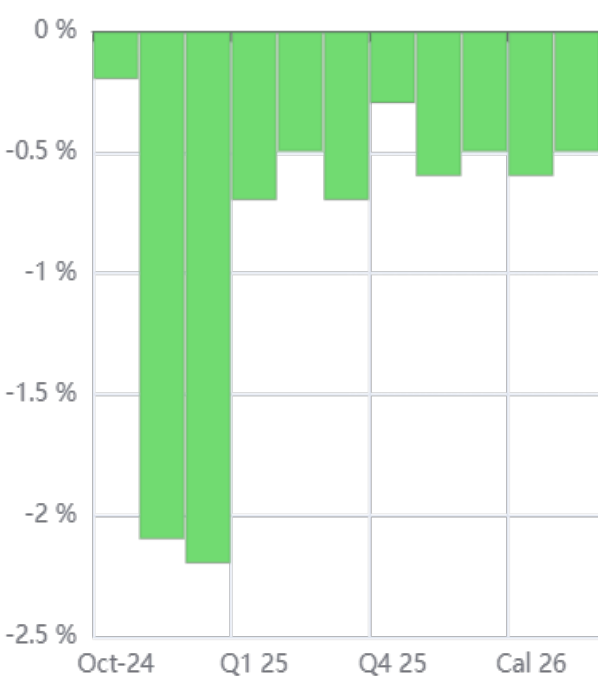
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Oct-24	10,846.00	-115.0	-1.0 %
Nov-24	11,318.00	-293.0	-2.5 %
Dec-24	11,471.00	-204.0	-1.7 %
Q1 25	10,191.33	-177.67	-1.7 %
Q2 25	12,414.00	-29.0	-0.2 %
Q3 25	12,300.00	-68.0	-0.5 %
Q4 25	12,179.00	-46.0	-0.4 %
Q1 26	10,743.00	-21.0	-0.2 %
Cal 25	11,771.08	-80.17	-0.7 %
Cal 26	11,575.00	-25.0	-0.2 %
Cal 27	11,739.00	-25.0	-0.2 %



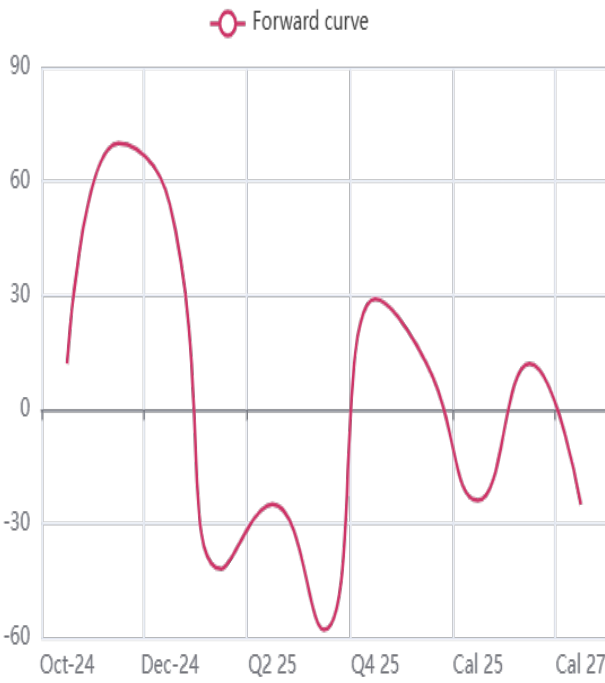
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Oct-24	13,790.00	-23.0	-0.2 %
Nov-24	13,430.00	-291.0	-2.1 %
Dec-24	13,470.00	-309.0	-2.2 %
Q1 25	11,266.67	-76.67	-0.7 %
Q2 25	12,910.00	-65.0	-0.5 %
Q3 25	12,930.00	-95.0	-0.7 %
Q4 25	12,750.00	-33.0	-0.3 %
Q1 26	12,110.00	-73.0	-0.6 %
12,464.17	Cal 25	-67.42	-0.5 %
Cal 26	12,110.00	-73.0	-0.6 %
Cal 27	12,210.00	-65.0	-0.5 %



灵便型散货船Handysize

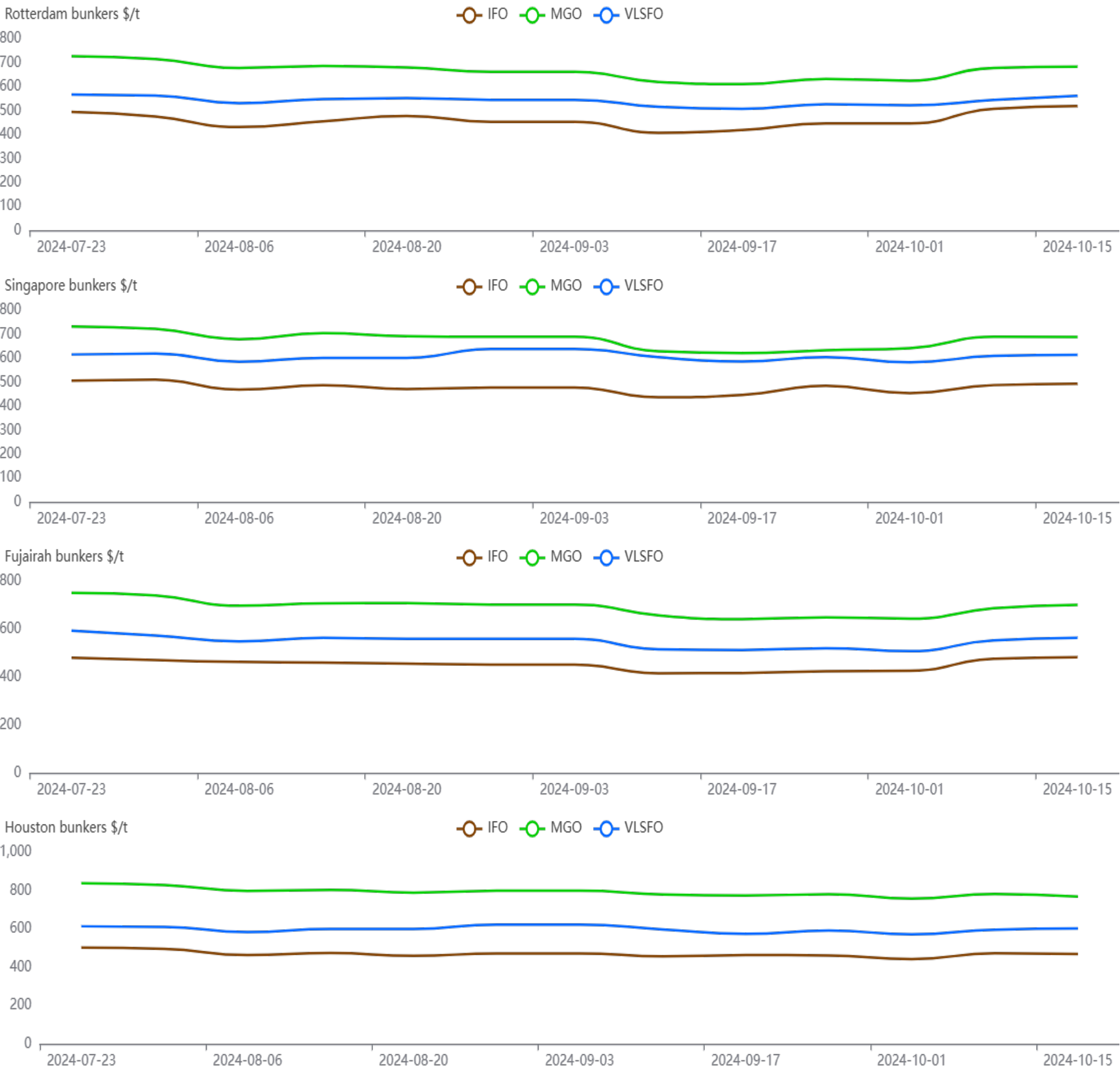
7TC	\$/day	WoW	
Oct-24	12,950.00	12.0	0.1 %
Nov-24	12,883.00	70.0	0.5 %
Dec-24	12,867.00	54.0	0.4 %
Q1 25	10,433.33	-42.0	-0.4 %
Q2 25	12,000.00	-25.0	-0.2 %
Q3 25	11,917.00	-58.0	-0.5 %
Q4 25	11,867.00	29.0	29.0
Q1 26	11,450.00	12.0	0.1 %
Cal 25	11,554.33	-24.0	-0.2 %
Cal 26	11,450.00	12.0	0.1 %
Cal 27	11,400.00	-25.0	-0.2 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	621.0	498.0	701.5	123.0	-17.0	-12.14	-4.28
Singapore	614.5	493.5	689.0	121.0	-1.0	-0.82	-13.57
Rotterdam	562.5	519.0	683.5	43.5	6.5	17.57	-50.85
Fujairah	564.0	483.0	701.5	81.0	3.5	4.52	-15.63
Houston	603.0	469.5	769.0	133.5	10.0	8.1	20.81

(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	212.0		1.0	0.47	2.91	-6.98
Maize	223.0		1.0	0.45	5.69	-10.04
Soybeans	212.0		-6.0	-2.75	0.0	-12.7
Rice	224.0		-1.0	-0.44	-7.44	-9.92
Barley	217.0		-3.0	-1.36	1.4	-3.45
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	70.57	-5.04	-6.67	-0.08	-17.19
Brent	USD/Bbl	74.12	-5.27	-6.64	1.3	-14.48
Natural Gas	USD/MMBtu	2.47	-0.29	-10.51	6.01	-27.57
Gasoline	USD/Gal	2.03	-0.09	-4.25	2.53	-9.38
Heating Oil	USD/Gal	2.2	-0.14	-5.98	3.29	-26.67
Ethanol	USD/Gal	1.52	-0.08	-5.0	-9.52	-33.04
Naphtha	USD/T	664.33	-20.28	-2.96	6.33	3.73
Propane	USD/Gal	0.72	-0.08	-10.0	9.09	4.35
Uranium	USD/Lbs	82.95	0.1	0.12	4.34	14.02
Methanol	CNY/T	2479.0	-22.0	-0.88	7.08	-0.2
TTF Gas	EUR/MWh	39.63	-0.06	-0.15	12.43	-3.11
UK Gas	GBp/thm	98.21	-1.46	-1.46	16.49	-3.1
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.31	-0.07	-1.6	2.86	17.76
Coal	USD/T	150.9	-2.1	-1.37	8.06	8.95
Steel	CNY/T	3381.0	11.0	0.33	11.33	-6.65
Iron Ore	USD/T	107.11	-5.28	-4.7	16.45	-10.37
Aluminum	USD/T	2550.0	-37.0	-1.43	2.12	13.79
Lithium	CNY/T	74500.0	-1000.0	-1.32	2.76	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2654.03	21.32	0.81	3.3	43.34
Silver	USD/t.oz	31.19	0.13	0.42	2.16	43.8
Platium	null	981.5	22.7	2.37	N/A	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.09		-0.01	-0.91	-1.8	3.81
USD/CNY	7.12		0.07	0.99	0.28	-2.47

第八部分 本周话题 WEEKLY TOPIC



在黑海俄罗斯增加了对挂靠乌克兰港口船舶的打击

10月14日周一，一艘悬挂圣基茨尼威斯船旗的杂货船离开了某乌克兰港口前往罗马尼亚港口，该船在10月6日停靠乌克兰港口装卸货过程中被俄罗斯导弹击中，莫斯科声称这艘货船携带武器进入了乌克兰，船东对此进行了猛烈抨击。船东表示，尽管莫斯科错误地攻击了该船，但是该船将继续在乌克兰进行贸易。该船东总部位于希腊比雷埃夫斯。HiFleet船舶档案显示，该船是1992年建造的一艘6912载重吨的杂货船，船舶管理公司为希腊公司，注册船东在马绍尔。

类似的袭击在10月初至少还发生了三次。10月7日，一艘5800载重吨的Optima（2008年建造）遭到袭击，这可能是俄罗斯为了打击乌克兰的海运贸易而采取的行动。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只于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。10月9日，上周三，在敖德萨地区，一艘葡萄牙管理的集装箱船在俄罗斯的导弹袭击中受损，这是本周第三次伤亡，也是一个月内的第五次伤亡。乌克兰副总理库列巴（Oleksiy Kuleba）在他的电报频道上发表声明，确认这艘船是悬挂巴拿马船旗的1679箱位SHUI SPIRIT号（2000年建造）。报道没有详细说明损失的程度，只是说，俄罗斯向敖德萨的港口基础设施发射了几枚弹道导弹，造成五名当地居民死亡。

目前来看俄罗斯针对乌克兰港口船舶的这些袭击可能还是双方为争夺黑海粮食出口贸易有关。截至发稿日乌克兰谷物的出口相比2023年增长了27%，接近2700万吨；小麦的出口相比2023年增长了41%，近1850万吨；其大豆的出口相对持平。而俄罗斯谷物出口几乎没有增加，小麦先对2023年还少了100万吨。也许俄罗斯的导弹袭击可能对乌克兰后期的粮食出口有一定影响，但总体应影响不会太大。

伦敦劳合社（Lloyd's of London）进行的一项调查研究显示，如果一场极端地缘政治冲突冲击海运路线并扰乱国际贸易，全球经济可能在5年内遭受高达50万亿美元的损失。根据劳合社（Lloyd's）和剑桥风险研究中心（Cambridge Centre for Risk Studies）拟定的最坏情况，超级大国入侵威胁封锁主要航道，将引发连锁的且广发的全球对抗，可能包括网络攻击、封锁和针锋相对的制裁。

On Monday, October 14, a general cargo ship flying the Saint Kittines-flagged ship left a Ukrainian port for a Romanian port. The ship was hit by a Russian missile while docked at a Ukrainian port to load and unload cargo on October 6. The ship's owner lashed out at Moscow's claim that the ship was carrying weapons into Ukraine. The ship's owner said that despite Moscow's mistake in attacking the ship, it would continue to trade in Ukraine. The shipowner is headquartered in Piraeus, Greece. HiFleet ship archives show that the ship is a 6,912 DWT general cargo vessel built in 1992, the ship management company is Greek, registered owner in Marshall.

Similar attacks took place at least three more times in early October. On October 7, a 5,800 DWT Optima (built in 2008) was attacked in what may have been a Russian move 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. Last Wednesday, Oct. 9, a Portuguese-managed container ship was damaged in a Russian missile strike in the Odessa region, the third casualty this week and the fifth in a month. Ukrainian Deputy Prime Minister Oleksiy Kuleba issued a statement on his telegraph channel identifying the ship as the Panamanian flagged 1,679-seat SHUI SPIRIT (built in 2000). The report did not elaborate on the extent of the damage, saying only that Russia had fired several ballistic missiles at Odessa's port infrastructure, killing five local residents.

For now, the attacks on ships in Ukrainian ports may also be related to competition for the Black Sea grain export trade. As of press time, Ukraine's cereal exports have increased by 27% compared to 2023, to nearly 27 million tons; Wheat exports increased 41 percent from 2023 to nearly 18.5 million tons. Its soybean exports were relatively flat. And Russian grain exports barely increased, with wheat falling by 1 million tons in 2023. Perhaps the Russian missile attack may have some impact on Ukraine's later grain exports, but the overall impact should not be too great.

The global economy could suffer losses of up to \$50tn over five years if an extreme geopolitical conflict hit shipping routes and disrupted international trade, according to a study by Lloyd's of London. According to a worst-case scenario drawn up by Lloyd's and the Cambridge Centre for Risk Studies, a superpower invasion threatening to block major shipping lanes would trigger a cascading and widespread global confrontation that could include cyber attacks, blockades and tit-for-tat sanctions.