



2024年 第45周市场周报

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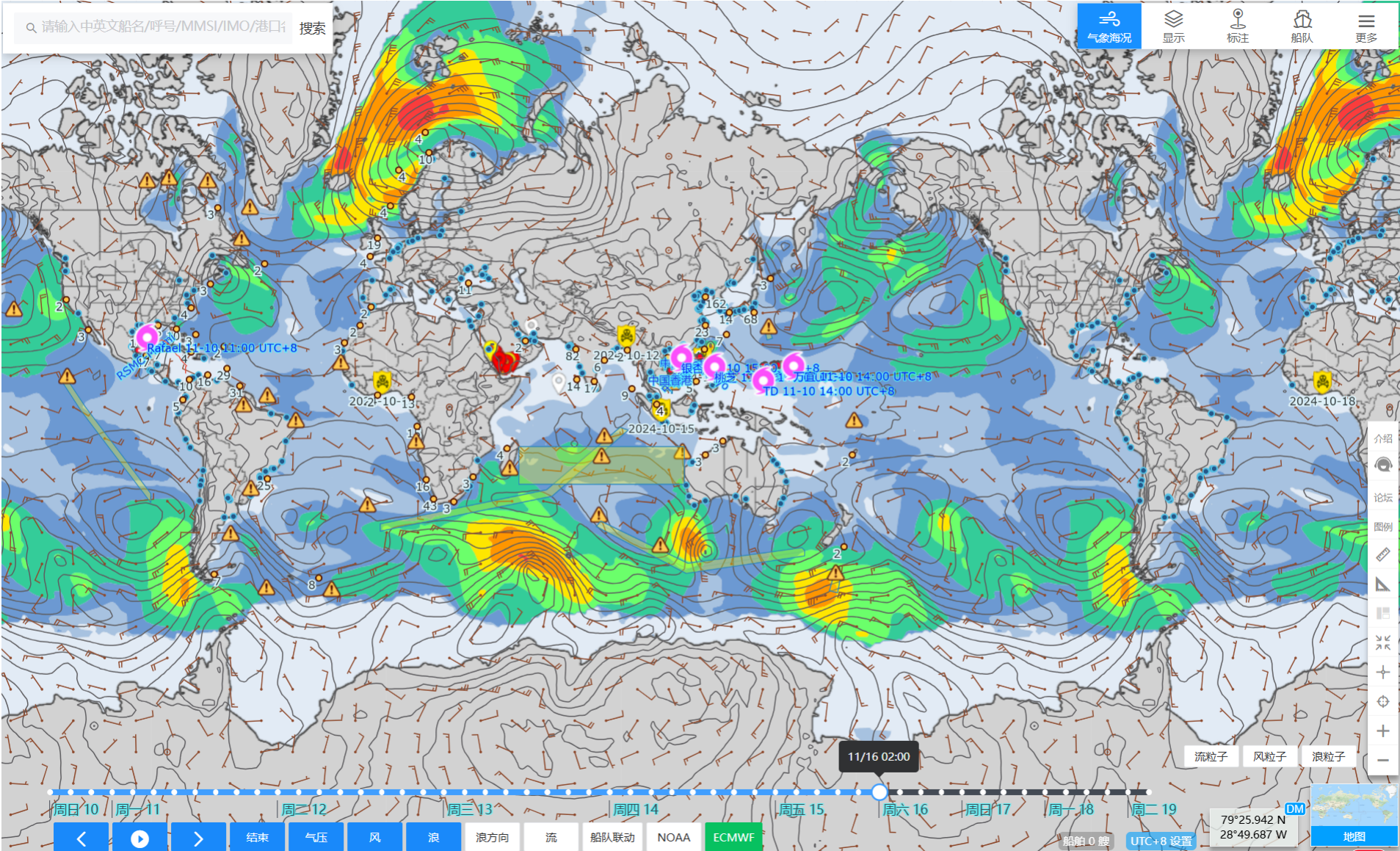
第七部分

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929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 929 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4-5级，相关海域轻浪；黄海风力3-4级，相关海域轻浪；东海风力3-6级，由强减弱，相关海域中浪；台湾海峡6-7级风，台湾海峡后经历巨浪；南海大部海域风力5-7级，相关海运有时巨浪。最近太平洋气旋活动频繁，其中银杏台风将于11月12日早上登陆越南。The coming week the wind in Bohai Sea is moderate with slight sea. Yellow Sea will be moderate with moderate sea as well. And China East Sea will become gentle from strong with moderate wave. The wind in the Taiwan Strait will be strong with rough wave. In most of the South China Sea the wind will be strong with rough wave occasionally. Recently the tropical cyclones in north Pacific become frequent and the Typhoon YinXing will land Vietnam in morning of 12th Nov.

海盗事件 Piracy

最近一周没有最新海盗事件报道。There is no pirate report for the latest week.

海上事件 Marine Incidents

11月1号凌晨，一艘日本油轮和一艘瑞士散货船在直布罗陀海峡发生碰撞，造成损坏。据西班牙媒体报道，26100载重吨的成品油轮Southern Puma（2016年建造）与30800载重吨的灵便型油轮Louisa Bolten（2009年建造）发生碰撞，泄漏了约500立方米石蜡。In the early hours of November 1st, a Japanese oil tanker and a Swiss bulk carrier collided in the Strait of Gibraltar, causing damage. According to Spanish media reports, the 26,100 DWT product tanker Southern Puma (built in 2016) collided with the 30,800 DWT handy tanker Louisa Bolten (built in 2009), leaking about 500 cubic meters of paraffin.

其它 Others

没有 Nil

备注 Remark

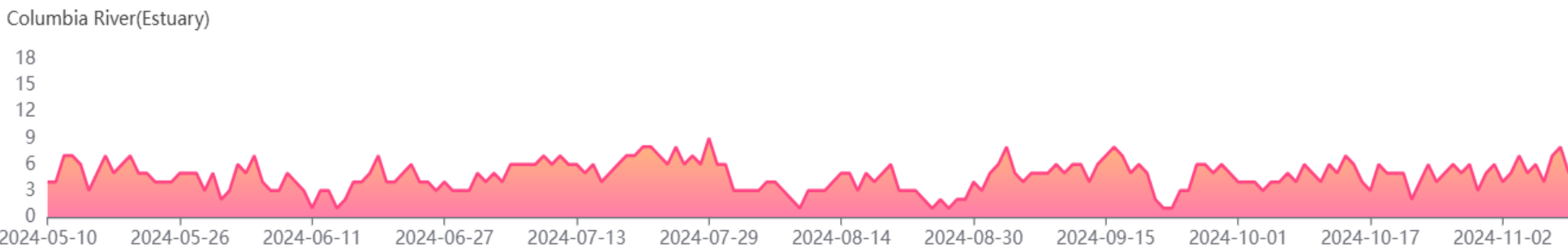
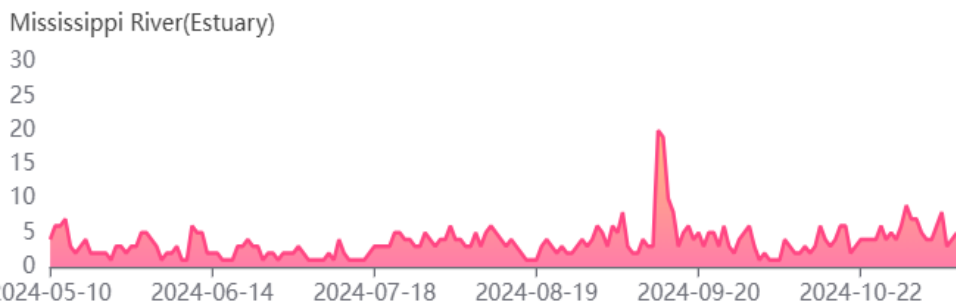
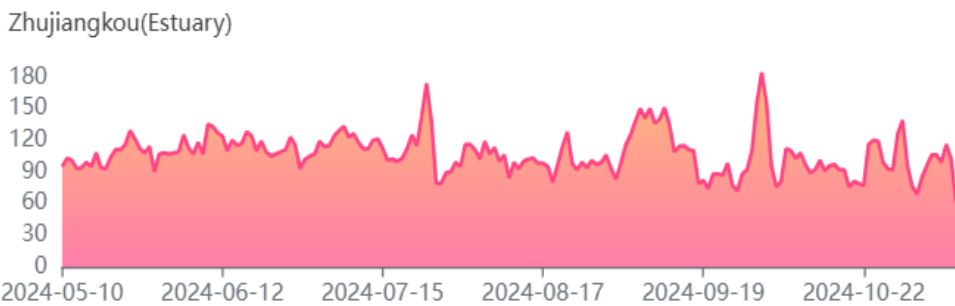
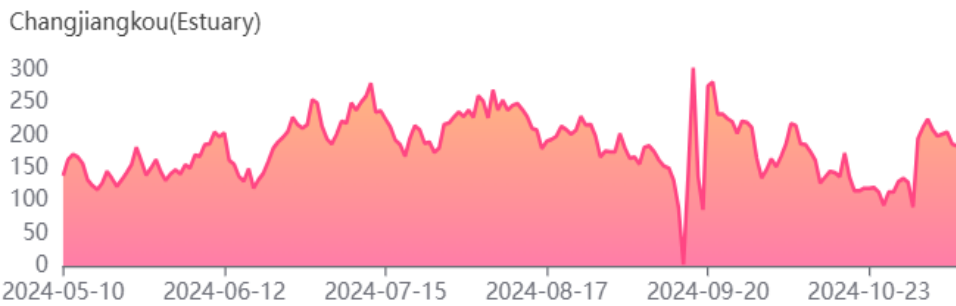
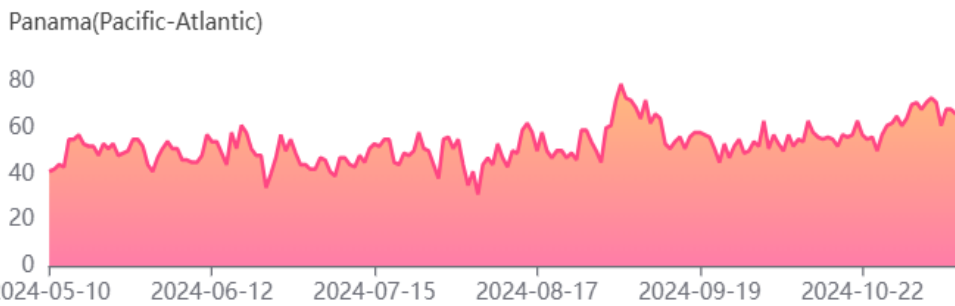
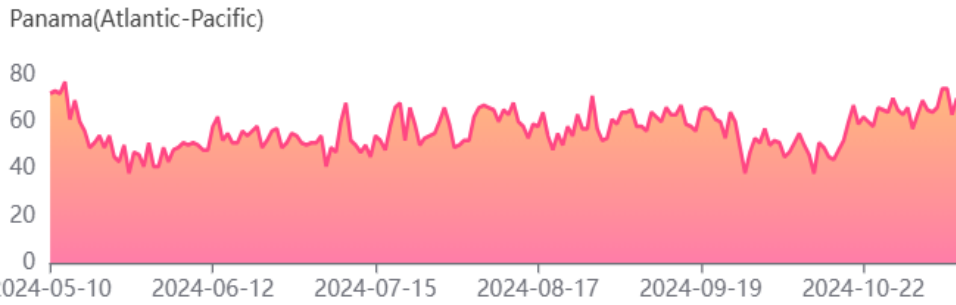
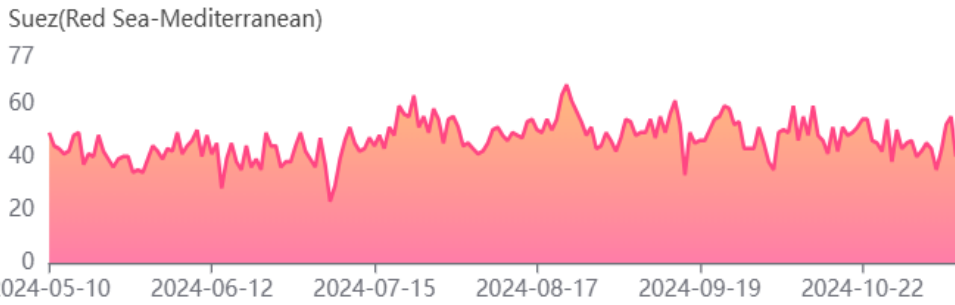
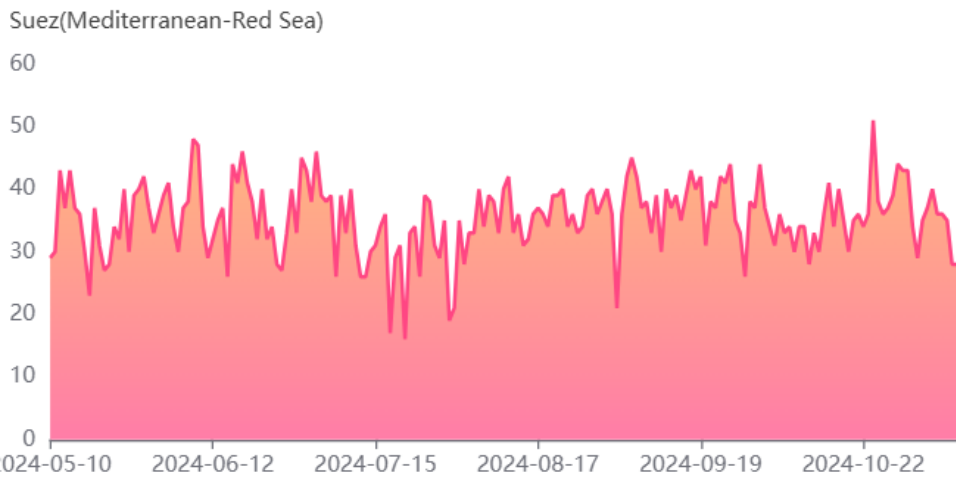
本报告数据截止时间为2024年11月10日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Nov 10th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	40	1338	-4	-75
Miss.Riv.	5	140	-8	39
CJK	184	4316	509	-1072
Pa.Atlan.	70	1779	28	214
Colum.Riv.	5	149	7	15
Suez.Med.	28	1056	-29	17
Pa.Pac.	66	1782	24	213
ZJK	61	2798	-5	-132

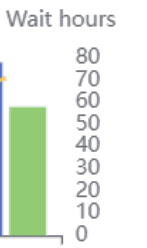
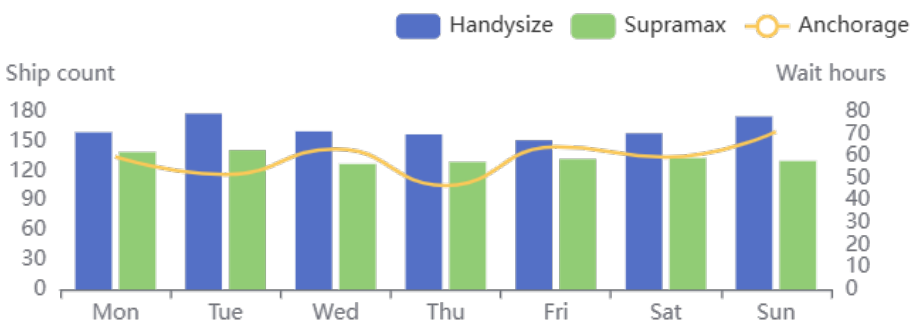


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

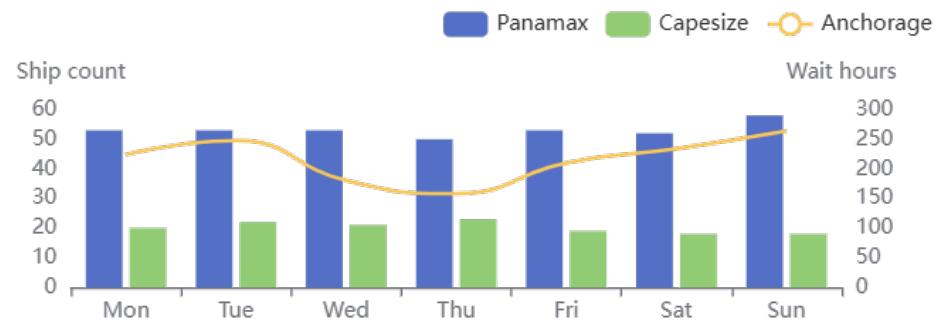
Type	M	T	W	Th	F	Sat	Sun
HDY	159	178	160	157	151	158	175
SMX	139	141	127	129	132	133	130
WT.h.	59.7	51.7	63.2	46.8	64.2	59.5	71



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

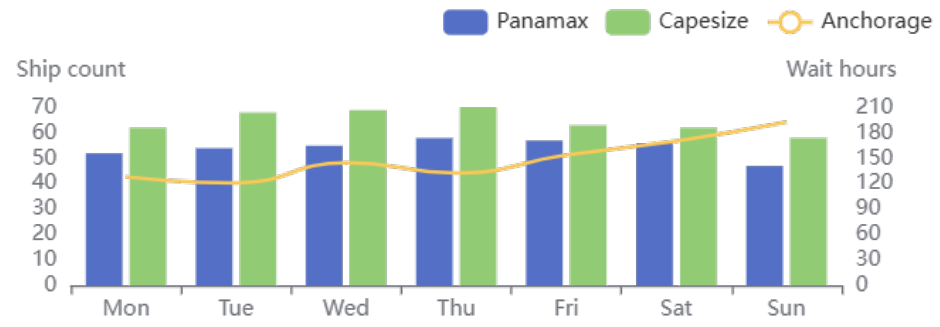
Type	M	T	W	Th	F	Sat	Sun
Pan.	53	53	53	50	53	52	58
Cap	20	22	21	23	19	18	18
WT.h.	224.1	248.1	180.4	158.2	210.2	234.2	264



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

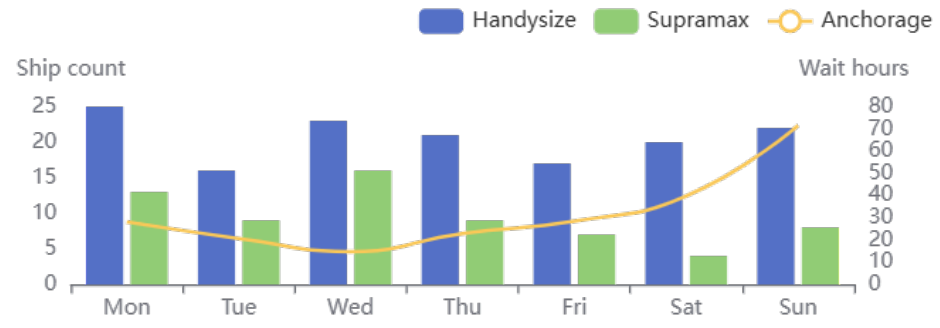
Type	M	T	W	Th	F	Sat	Sun
Pan.	52	54	55	58	57	56	47
Cap	62	68	69	70	63	62	58
WT.h.	128.3	121.1	145.1	132.8	154.2	170.7	193



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

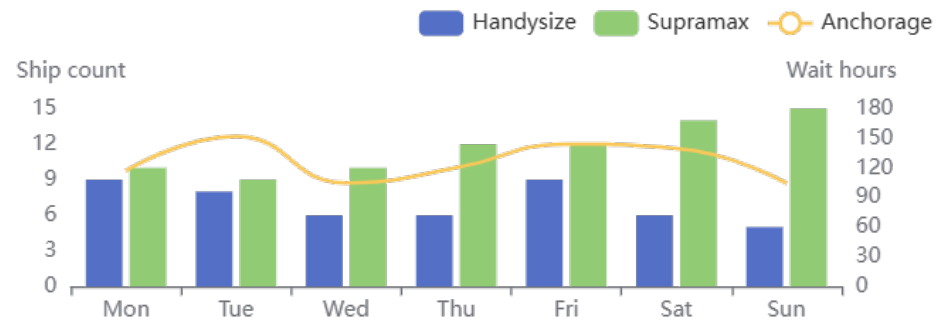
Type	M	T	W	Th	F	Sat	Sun
HDY	25	16	23	21	17	20	22
SMX	13	9	16	9	7	4	8
WT.h.	28.15	20.7	14.8	22.95	28.45	39.8	71.5



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

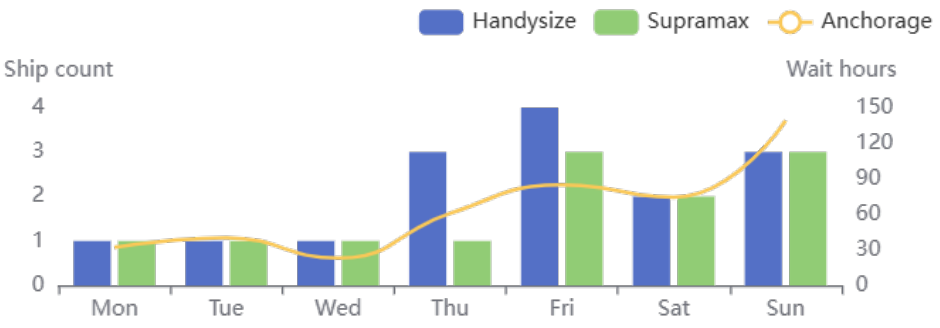
Type	M	T	W	Th	F	Sat	Sun
HDY	9	8	6	6	9	6	5
SMX	10	9	10	12	12	14	15
WT.h.	117.2	152	104.8	120.1	144.1	139.85	104.5



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

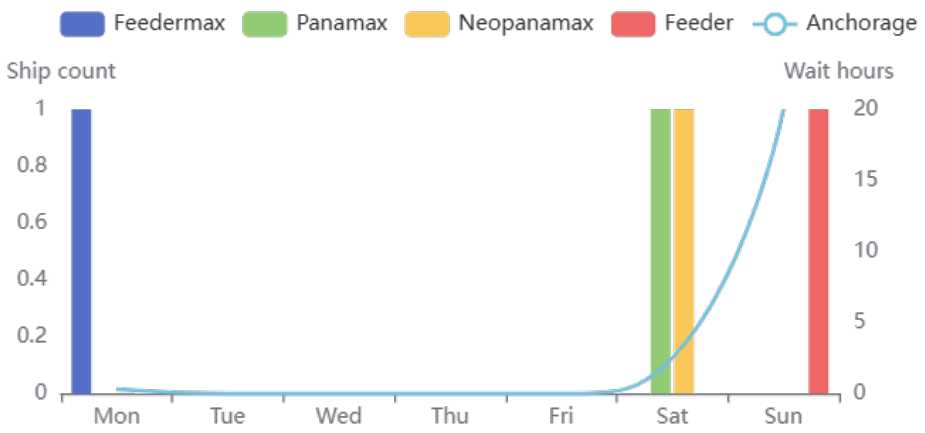
Type	M	T	W	Th	F	Sat	Sun
HDY	1	1	1	3	4	2	3
SMX	1	1	1	1	3	2	3
WT.h.	32.05	40.1	23.0	60.8	84.8	74.3	139



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

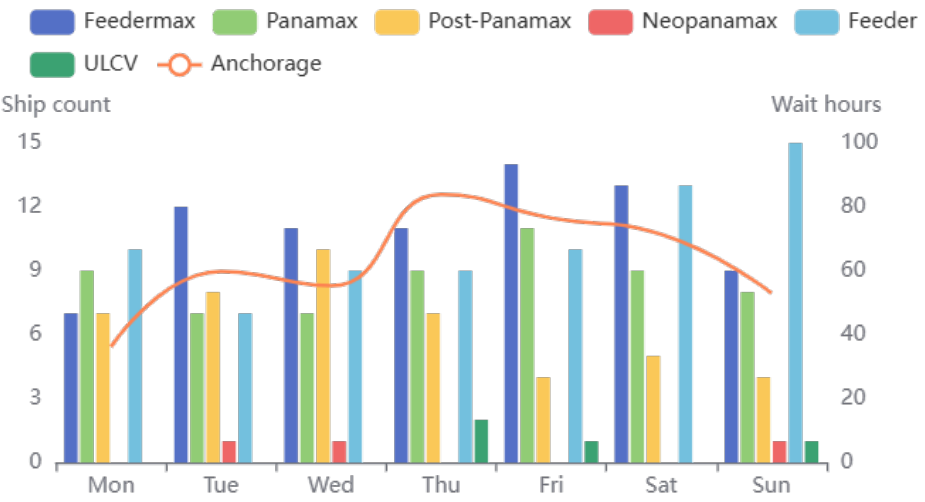
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	0	0	0	0	0	0
Pan.	0	0	0	0	0	1	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	0	1	0
Fd	0	0	0	0	0	0	1
WT.h.	0.3	0.0	0.0	0.0	0.0	2.5	20
Ulcw	0	0	0	0	0	0	0



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

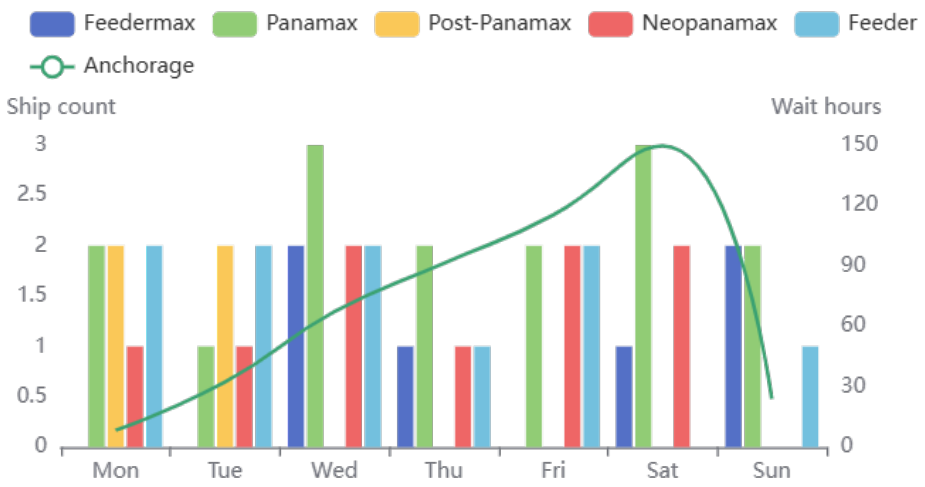
Type	M	T	W	Th	F	Sat	Sun
F.ma.	7	12	11	11	14	13	9
Pan.	9	7	7	9	11	9	8
PPx	7	8	10	7	4	5	4
NPx	0	1	1	0	0	0	1
Fd	10	7	9	9	10	13	15
Ulcw	0	0	0	2	1	0	1
WT.h.	36.2	59.8	55.3	83.9	76.5	71.4	53



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

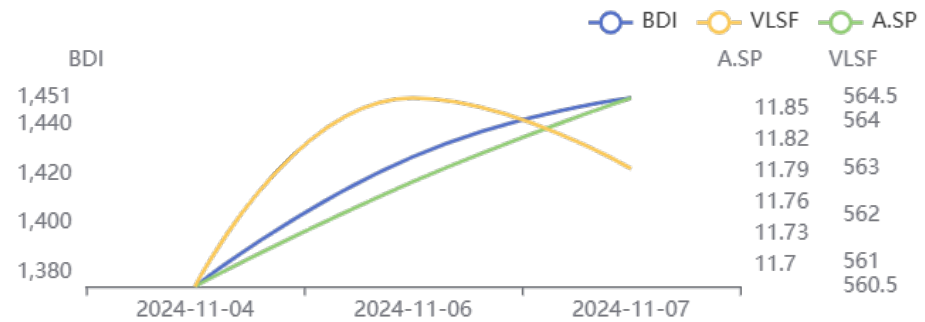
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	2	1	0	1	2
Pan.	2	1	3	2	2	3	2
PPx	2	2	0	0	0	0	0
NPx	1	1	2	1	2	2	0
Fd	2	2	2	1	2	0	1
Ulcw	0	0	0	0	0	0	0
WT.h.	8.4	32.4	67.3	91.3	115.3	149.6	24



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

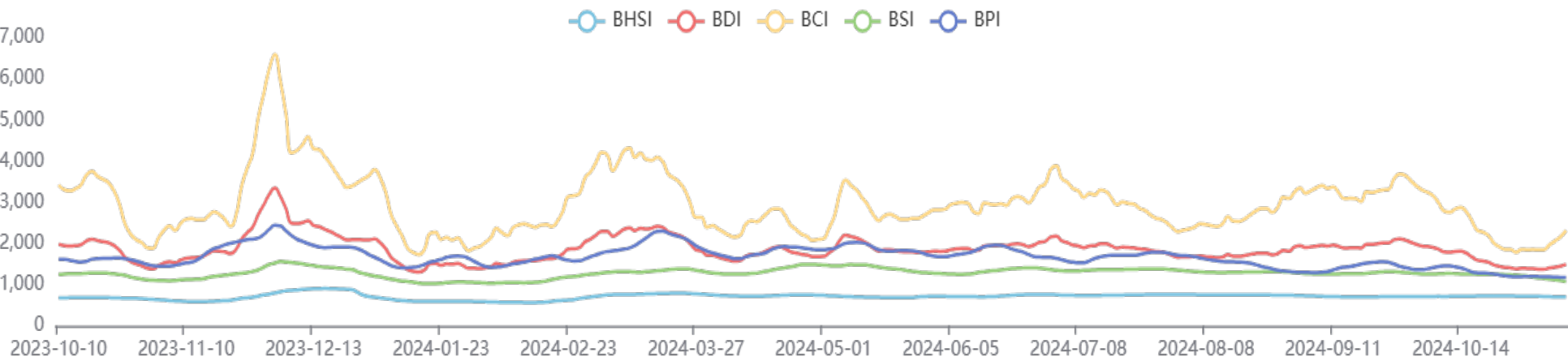
Type	M	T	W	Th	F	Sat	Sun
BDI	1154	1118	1098				
VLSF	560.50	564.00	564.50	563.00			
A.SP	11.68	11.74	11.78	11.86	11.83	11.82	



第三部分 航运市场 SHIPPING MARKET

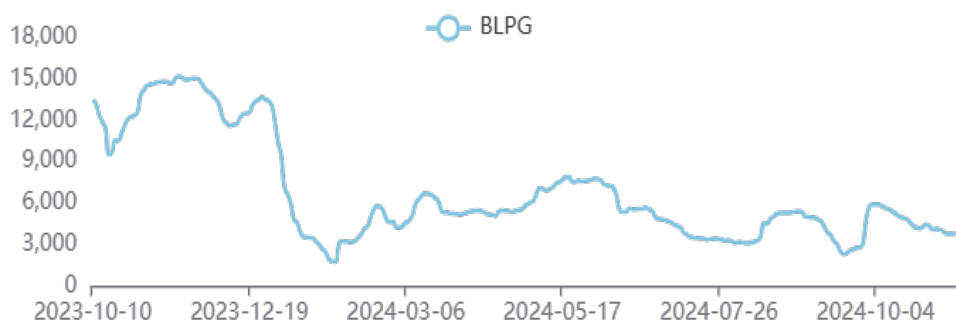
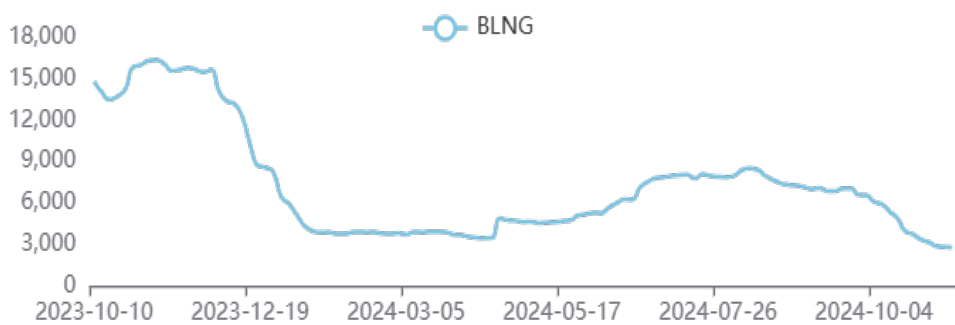
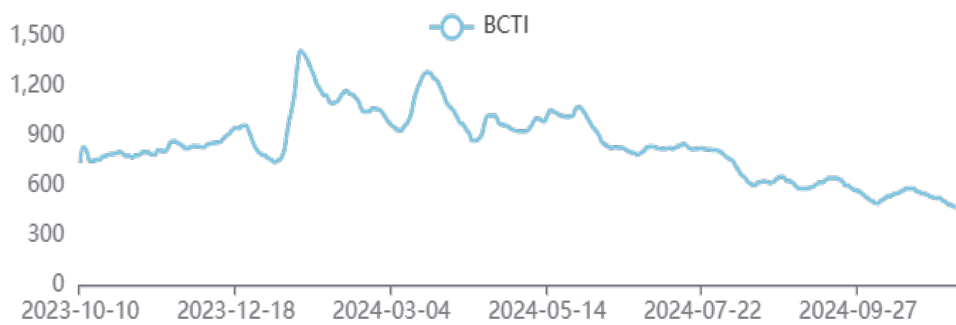
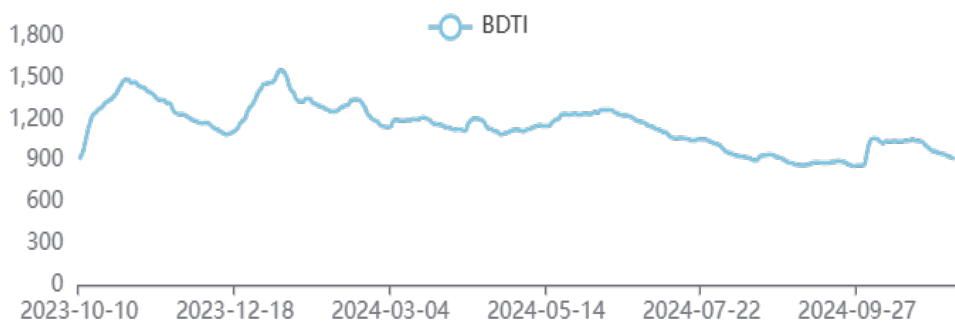
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1495	117.0	8.49	-17.36	-2.29
BCI	2316	468.0	25.32	-18.31	-0.09
BPI	1176	-23.0	-1.92	-18.05	-20.0
BSI	1079	-84.0	-7.22	-14.97	-2.26
BHSI	703	-15.0	-2.09	-2.09	15.82



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	913	-44.0	-4.6	-11.87	-35.88
BCTI	466	-58.0	-11.07	-12.9	-41.82
BLNG	2793	-75.0	-2.62	-48.09	-82.6
BLPG	3806	-275.0	-6.74	-29.83	-74.11



第四部分 运力分布 SUPPLY DISTRIBUTION

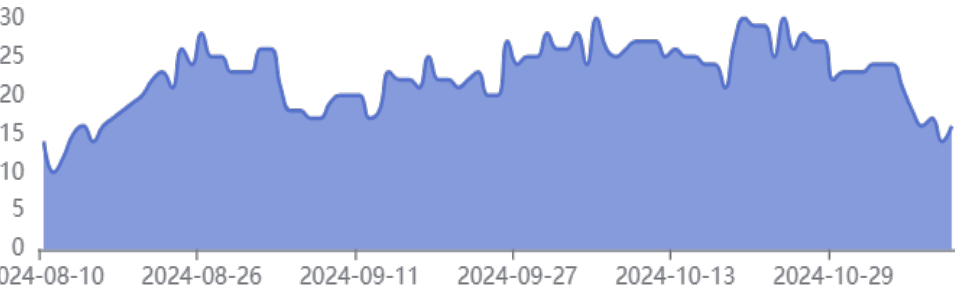


好望角型散货船 Capesize

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	24	21	18	16	17	14	16



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.

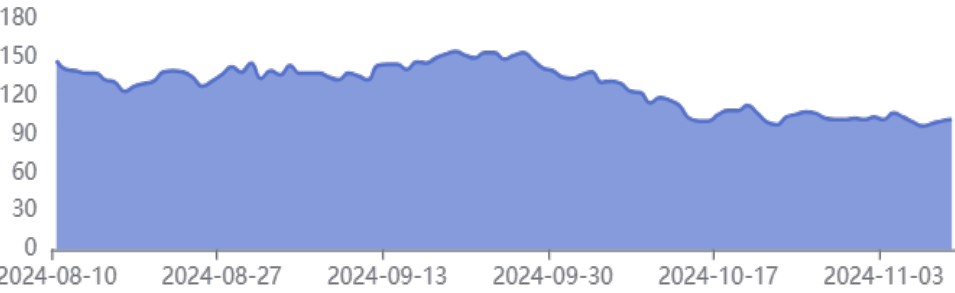
Type	M	T	W	Th	F	Sat	Sun
Cape	30	32	36	38	34	35	33

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.

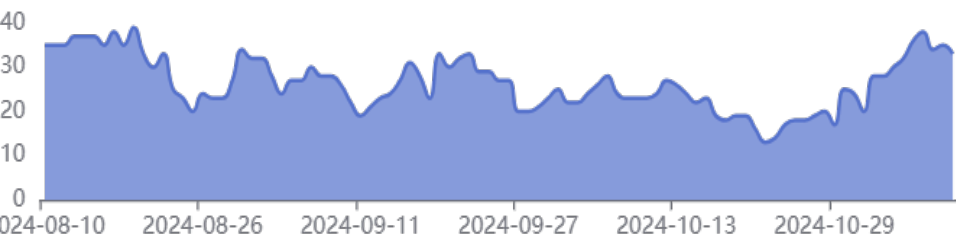
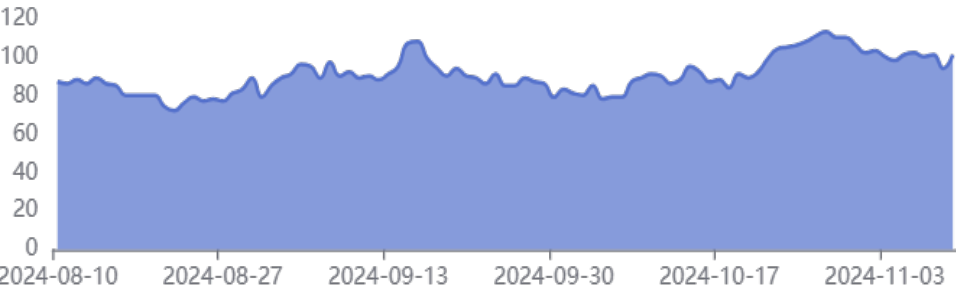
Type	M	T	W	Th	F	Sat	Sun
Pan.	106	103	99	96	98	100	101



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.

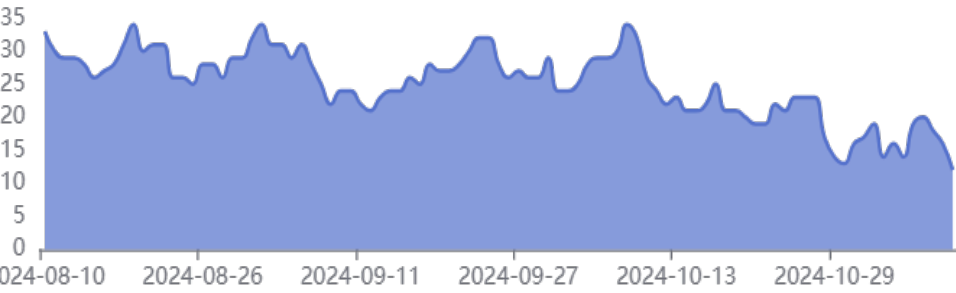
Type	M	T	W	Th	F	Sat	Sun
Cape	98	101	102	100	101	94	101



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.

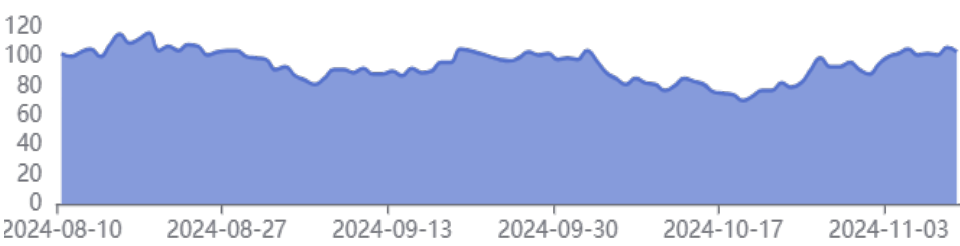
Type	M	T	W	Th	F	Sat	Sun
Pan.	12	14	15	16	13	12	16



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.	102	105	101	102	101	106	103

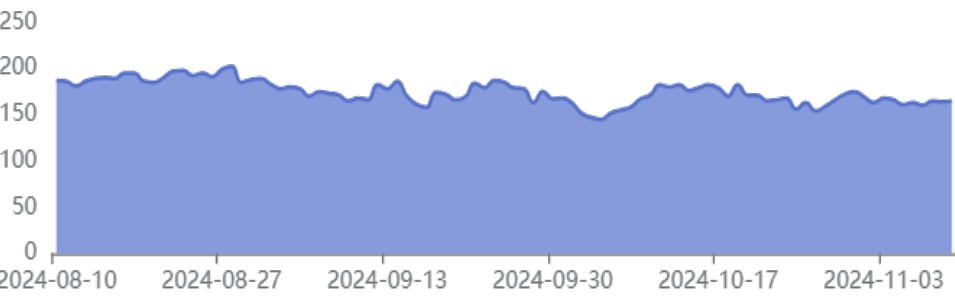


超大灵便型散货 SUPRAMAX

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.

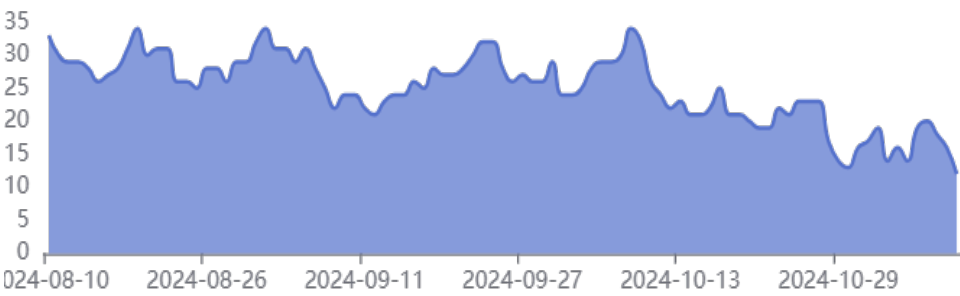
Type	M	T	W	Th	F	Sat	Sun
SMX	166	161	163	160	165	164	165



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.

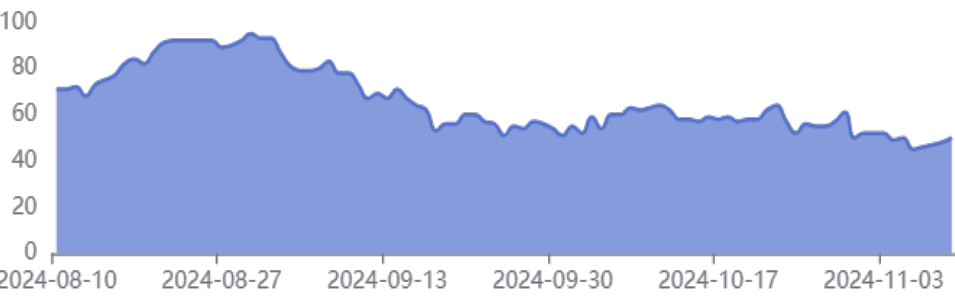
Type	M	T	W	Th	F	Sat	Sun
SMX	16	14	19	20	18	16	12



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.

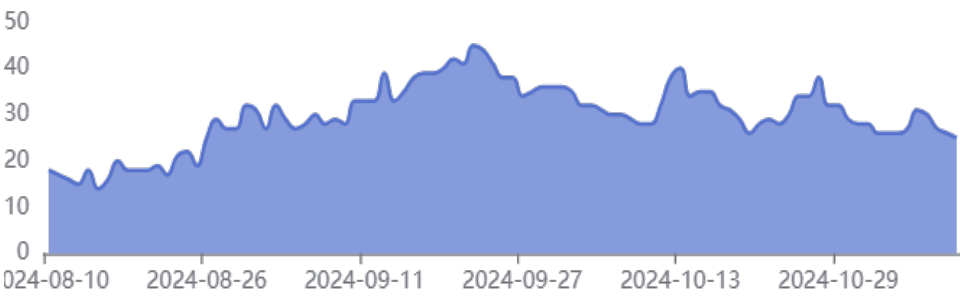
Type	M	T	W	Th	F	Sat	Sun
SMX	26	27	31	30	27	26	25



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.

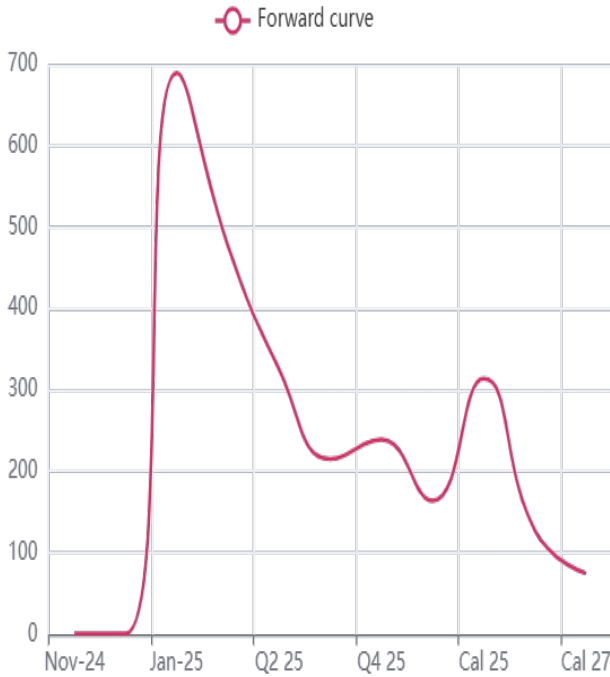
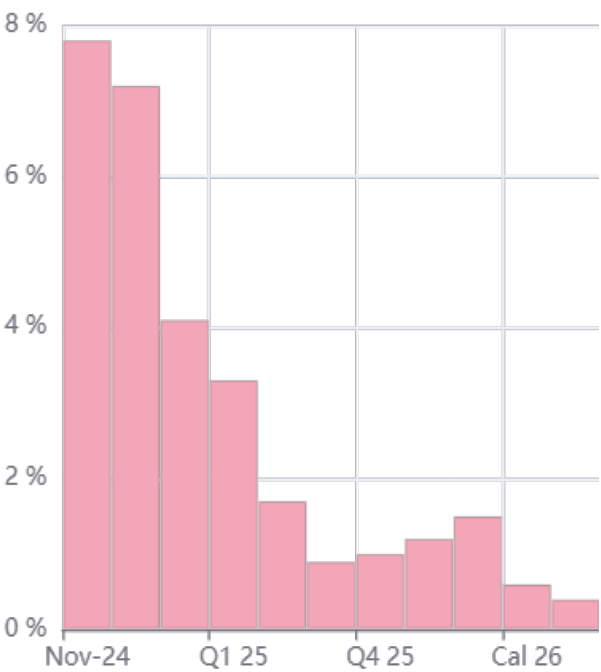
Type	M	T	W	Th	F	Sat	Sun
SMX	49	50	45	46	47	48	50



第五部分 远期运价协议 FFA

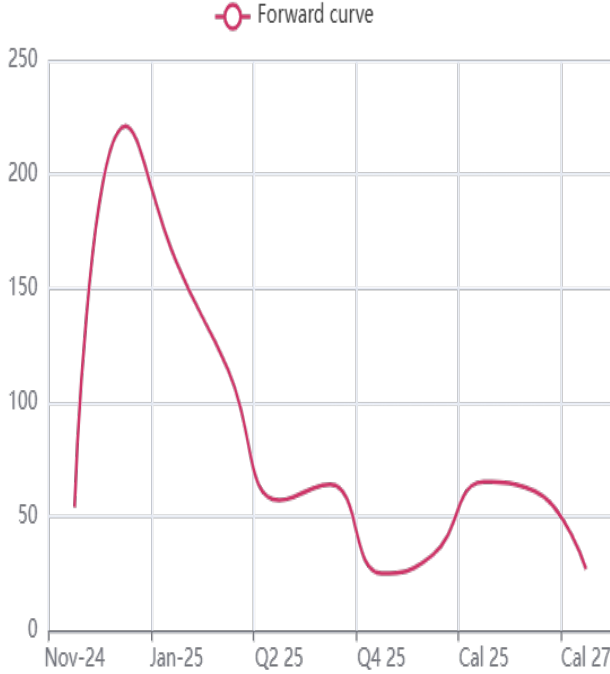
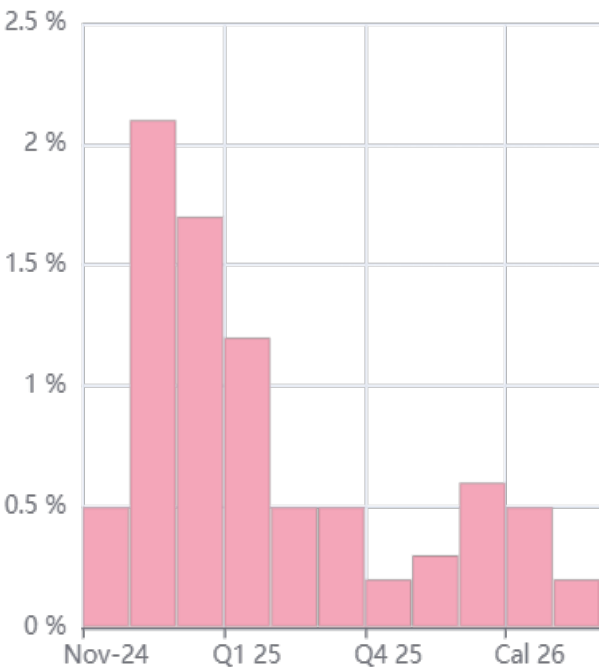
好望角型散货船Capesize

5TC	\$/day	WoW	
Nov-24	21,104.00	1536.0	7.8 %
Dec-24	24,232.00	1628.0	7.2 %
Jan-25	17,432.00	689.0	4.1 %
Q1 25	14,884.33	477.33	3.3 %
Q2 25	19,489.00	325.33	1.7 %
Q3 25	23,829.00	215.0	0.9 %
Q4 25	24,207.00	239.0	1.0 %
Q1 26	14,257.00	164.0	1.2 %
Cal 25	20,602.33	314.17	1.5 %
Cal 26	20,388.75	128.0	0.6 %
Cal 27	20,279.00	75.0	0.4 %



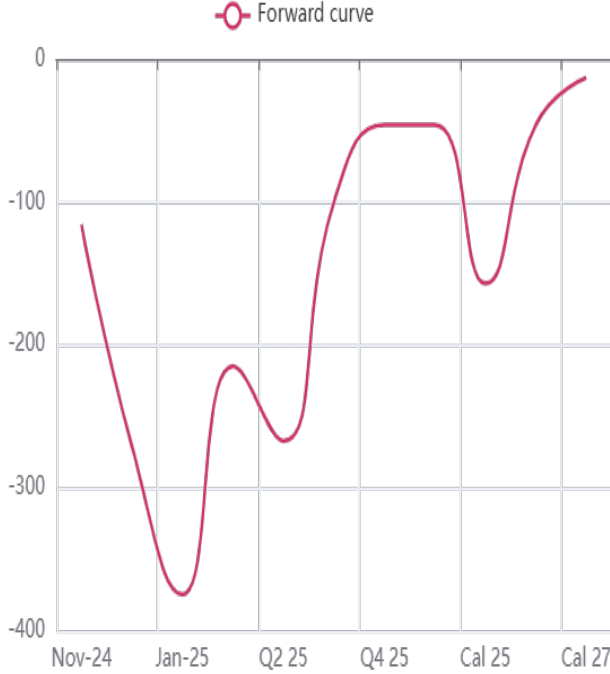
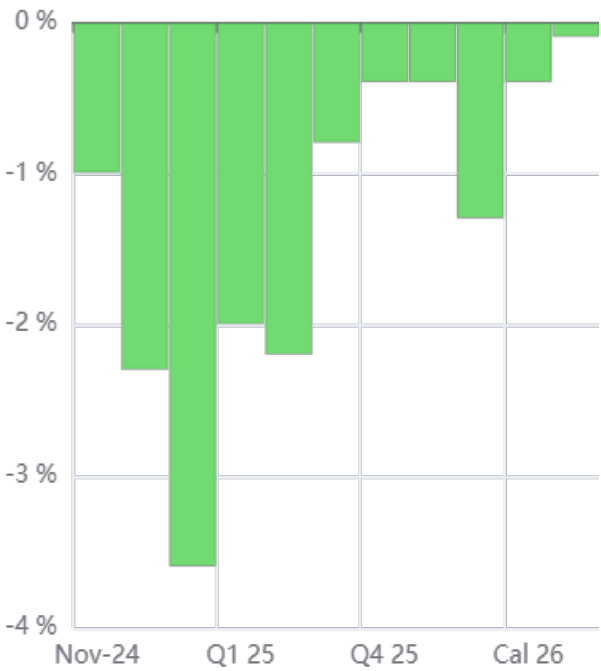
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Nov-24	9,961.00	54.0	0.5 %
Dec-24	10,864.00	221.0	2.1 %
Jan-25	9,707.00	161.0	1.7 %
Q1 25	9,959.33	114.33	1.2 %
Q2 25	12,093.00	57.0	0.5 %
Q3 25	11,875.00	64.0	0.5 %
Q4 25	11,629.00	25.0	0.2 %
Q1 26	10,504.00	33.0	0.3 %
Cal 25	11,389.08	65.08	0.6 %
Cal 26	11,318.00	61.0	0.5 %
Cal 27	11,479.00	27.0	0.2 %



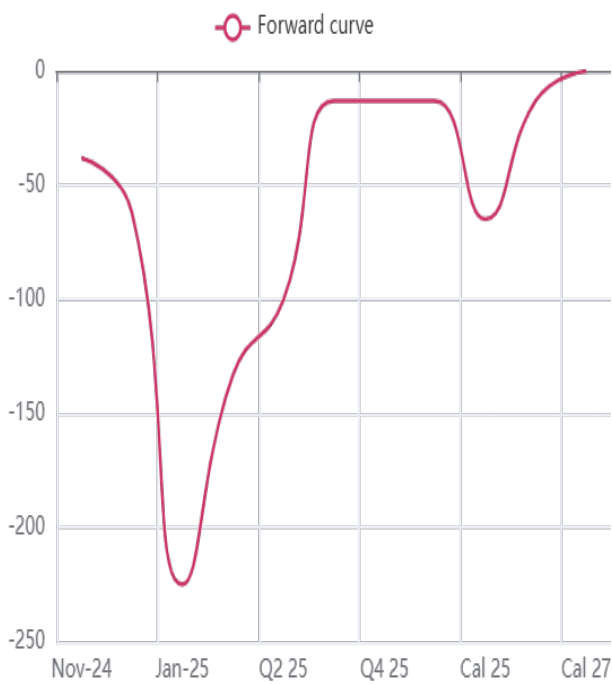
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Nov-24	11,592.00	-116.0	-1.0 %
Dec-24	11,596.00	-271.0	-2.3 %
Jan-25	10,188.00	-375.0	-3.6 %
Q1 25	10,283.67	-215.0	-2.0 %
Q2 25	12,150.00	-267.33	-2.2 %
Q3 25	12,342.00	-100.0	-0.8 %
Q4 25	12,267.00	-46.0	-0.4 %
Q1 26	11,692.00	-46.0	-0.4 %
11,760.67	Cal 25	-157.08	-1.3 %
Cal 26	11,692.00	-46.0	-0.4 %
Cal 27	11,729.00	-13.0	-0.1 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Nov-24	12,325.00	-38.0	-0.3 %
Dec-24	12,188.00	-62.0	-0.5 %
Jan-25	9,225.00	-225.0	-2.4 %
Q1 25	9,287.67	-133.33	-1.4 %
Q2 25	11,625.00	-100.33	-0.9 %
Q3 25	11,650.00	-13.0	-0.1 %
Q4 25	11,550.00	-13.0	-13.0
Q1 26	11,075.00	-13.0	-0.1 %
Cal 25	11,028.17	-64.92	-0.6 %
Cal 26	11,075.00	-13.0	-0.1 %
Cal 27	11,150.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	603.5	482.5	682.5	121.0	8.5	7.56	-13.57
Singapore	596.0	481.0	687.0	115.0	13.0	12.75	-5.74
Rotterdam	524.5	489.0	687.0	35.5	12.5	54.35	-4.05
Fujairah	538.0	467.0	668.5	71.0	15.5	27.93	-8.39
Houston	582.5	458.5	770.5	124.0	9.0	7.83	0.4

(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	205.0		0.0	0.0	-2.84	-9.41
Maize	222.0		-2.0	-0.89	0.0	-6.36
Soybeans	211.0		-2.0	-0.94	-3.21	-17.06
Rice	214.0		-3.0	-1.38	-4.89	-11.55
Barley	216.0		1.0	0.47	-1.82	-2.64
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	71.63	4.06	6.01	-5.26	-14.79
Brent	USD/Bbl	75.26	3.59	5.01	-5.2	-15.67
Natural Gas	USD/MMBtu	2.79	-0.05	-1.76	1.09	-16.72
Gasoline	USD/Gal	2.03	0.06	3.05	-4.25	-11.74
Heating Oil	USD/Gal	2.29	0.16	7.51	-2.14	-24.17
Ethanol	USD/Gal	1.57	0.05	3.29	-1.88	-31.44
Naphtha	USD/T	652.86	1.53	0.23	-4.64	0.95
Propane	USD/Gal	0.81	0.1	14.08	1.25	17.39
Uranium	USD/Lbs	78.2	-2.85	-3.52	-5.61	7.12
Methanol	CNY/T	2472.0	1.0	0.04	-1.16	0.73
TTF Gas	EUR/MWh	40.88	-1.79	-4.19	3.0	-24.01
UK Gas	GBP/thm	103.63	-3.01	-2.82	3.97	-23.1
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.42	0.09	2.08	0.91	21.1
Coal	USD/T	143.9	-0.6	-0.42	-5.95	6.43
Steel	CNY/T	3332.0	7.0	0.21	-1.13	-10.12
Iron Ore	USD/T	103.91	-0.32	-0.31	-7.55	-13.77
Aluminum	USD/T	2642.5	-3.0	-0.11	2.15	18.31
Lithium	CNY/T	72500.0	1000.0	1.4	-3.97	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2733.45	-17.35	-0.63	3.83	37.04
Silver	USD/t.oz	32.47	-1.4	-4.13	4.54	40.56
Platium	null	984.7	-58.0	-5.56	2.7	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.09		0.01	0.93	-0.91	2.83
USD/CNY	7.11		-0.04	-0.56	0.85	-3.0

第八部分 本周话题 WEEKLY TOPIC



特朗普重新入主白宫后航运市场会发生哪些变化

2024年11月6日，备受全世界所关注的美国大选终于尘埃落定，几家欢喜几家愁。共和党特朗普以明显的优势击败了民主党哈里斯获得美国第47任总统，2016年特朗普还击败过希拉里当选美国第45任总统。

唐纳德·特朗普（Donald Trump）赢得美国总统大选，开启了他的总统2.0时代，共和党还同时赢得了美国参议院控制权，这是共和党罕见获得总统宝座和参众两院，还有一个最高法院。这意味着共和党特朗普可以大展身手，充分施展其执政理念和手段。原来和美国保持密切合作的国家和地区基本又要适应新的策略和方向，世界最关心的是会对世界产生哪些影响。第一个首当其冲的应该还是关税大棒，相信很快会实施；第二个是各种撤军和退群，大力消减政府开支；第三是大力复兴美国制造业；第四就是美国国内实施减税。

美国前总统唐纳德·特朗普（Donald Trump）已经确定将重返白宫，他的重点将转向组建一个团队来领导他的政府。他在45任总统任期内选用在航运界的人物备受尊敬，包括商务部长威尔伯·罗斯（Wilbur Ross），这位亿万富翁的私人股本帝国投资于航运，交通部长赵小兰（Elaine Chao）是纽约船东詹姆斯·赵（James Chao）的女儿，曾任美国海事局官员，以及海事管理局局长马克·巴斯·巴斯比，他是一名海军少将，曾指挥美国海军的军事海运司令部。

航运界都在揣摩随着特朗普入主白宫后航运市场会发生哪些变化。按逻辑分析，首先是关税大棒会直接冲击跨洋商品贸易，特别是针对中国的关税政策，跨太平洋和跨大西洋航线的集装箱运输量和运价可能会出现较大调整，东南亚集装箱航线运输有回升可能。

特朗普的背景是个商人，美国优先原则可能会促使美国原油/天然气和粮食的出口受益，有利于能源运输航运企业和巴拿马粮食运输船型。同时美国会想办法尽快结束俄乌战争，乌克兰的重建将会提到日程，将有利于灵便型船舶黑海航线的繁荣。俄乌战争平息后，美国会尽快协调平息胡塞武装对红海的威胁，红海航线的重新恢复会对集装箱运价双重打击，那时大家可能幡然醒悟，大家可能看到更多老旧集装箱被拆解。

特朗普的回归让美国金融有了信息，短期已经看到了大幅度的上涨，而航运股票市场出现了板块分化，其中集装箱航运市场开始出现回调，马士基引领集装箱股回落，能源航运企业张开双臂欢迎特朗普的回归。

国际航运市场最受国际政治的影响，该市场不仅受制于地区经济的发展驱动，更受制于地区间的贸易往来，全球供应链多级发展很容易受到来自政治风向影响。

On November 6, 2024, the United States election, which has attracted worldwide attention, was finally settled, and several rejoiced and several worried. Republican Trump defeated Democrat Harris by a clear margin to become the 47th president of the United States, and in 2016, Trump also defeated Hillary Clinton to become the 45th president of the United States. When Donald Trump won the US presidential election, ushering in his presidential 2.0 era, the Republican Party also won control of the US Senate, giving it a rare hold on the presidency and both houses of Congress, as well as a Supreme Court. This means that the Republican Trump can show his strength and fully display his ideas and methods. Countries and regions that used to maintain close cooperation with the United States basically have to adapt to the new strategy and direction, and the world is most concerned about what impact it will have on the world. The first priority should be the big stick of tariffs, which will be implemented soon. The second is various troop withdrawals and retirements, and drastic cuts in government spending; The third is a vigorous revival of American manufacturing; The fourth is the implementation of tax cuts in the United States.

Former US President Donald Trump is set to return to the White House and his focus will turn to assembling a team to lead his administration. He has chosen highly respected figures in the shipping world during his 45 presidential terms, including Commerce Secretary Wilbur Ross, a billionaire whose private equity empire has invested in shipping, and Transportation Secretary Elaine Chao, the daughter of New York shipowner James Chao, Former U.S. Maritime Administration official, and Maritime Administration Director Mark Busby, a Rear admiral who commanded the U.S. Navy's Military Sealift Command.

The shipping industry is wondering how the shipping market will change with Trump in the White House. According to the logical analysis, the first is that the tariff stick will directly impact the trans-oceanic commodity trade, especially for China's tariff policy, the container traffic volume and freight rate of the trans-Pacific and trans-Atlantic routes may be greatly adjusted, and the container traffic in Southeast Asia may rebound.

Trump's background is as a businessman, and the "America First" principle is likely to benefit U.S. exports of crude oil/gas and grain, benefiting energy transport shipping companies and Panamanian grain carriers. At the same time, the United States will find a way to end the Russian-Ukrainian war as soon as possible, and the reconstruction of Ukraine will be put on the agenda, which will be conducive to the prosperity of the Black Sea route for portable ships. After the end of the war between Russia and Ukraine, the United States will coordinate as soon as possible to quell the threat of the Houthi armed forces to the Red Sea, and the resumption of the Red Sea route will have a double blow to the container freight rate, then we may wake up to the fact that we may see more old containers dismantled.

The return of Trump has given the United States financial information, and has seen a sharp rise in the short term, while the shipping stock market has undergone a sector differentiation, among which the container shipping market has begun to correction, Maersk has led the decline of container stocks, and energy shipping companies have welcomed the return of Trump with open arms.

The international shipping market is most affected by international politics, which is not only driven by regional economic development, but also by inter-regional trade. The multi-stage development of the global supply chain is easily affected by the political wind.