



2024年 第46周市场周报

Contents

第一部分

航运安全 SHIPPING SAFETY

第二部分

航运数据 SHIPPING DATA

第三部分

航运市场 SHIPPING MARKET

第四部分

运力分布 SUPPLY DISTRIBUTION

第五部分

远期运价协议 FFA

第六部分

燃油价格 BUNKER PRICE

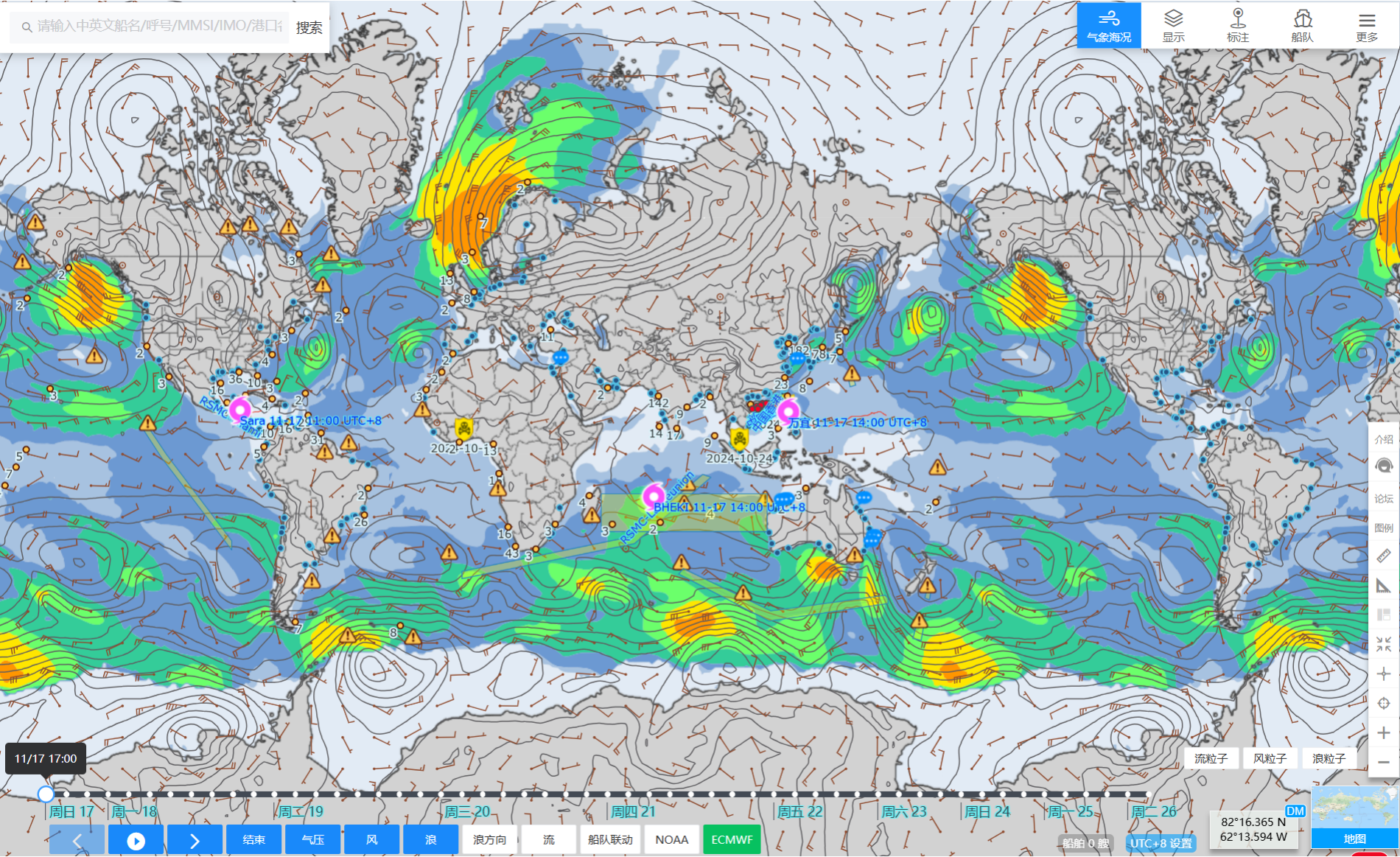
第七部分

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1021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 1021 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6级减弱到4级，相关海域大浪到中浪；东海风力7级减弱到4级，相关海域巨浪到中浪；台湾海峡7-9级风，台湾海峡经历巨浪；南海大部海域风力6-9级，相关海运有时巨浪。最近太平洋气旋活动频繁，其中万宜台风预计将于11月21日登陆越南。The coming week the wind in Bohai Sea is moderate with slight sea. Yellow Sea will become weak from strong breeze with moderate sea. And China East Sea will become moderate from near gale and experience very rough sea. The wind in the Taiwan Strait will experience strong gale with very rough wave. In most of the South China Sea the wind will experience strong gale with very rough wave occasionally. Recently the tropical cyclones in north Pacific become frequent and the Typhoon Wan Yi might land Vietnam in 21st 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11日消息，在澳大利亚新南威尔士州海域，一名船员从一艘散货船上坠落，24小时后该坠落的船员被发现还活着。据报道，11月8日这名20多岁的无名海员在新南威尔士州布莱克史密斯海滩被一名渔民发现，此前他在纽卡斯尔锚地的95500载重吨“DOUBLE DELIGHT”号（2015年建造）上失踪。A crew member who fell from a bulk carrier off the coast of New South Wales, Australia, was found alive 24 hours later. The unnamed seaman, who is in his 20s, was reportedly found by a fisherman on Blacksmith Beach, New South Wales, on November 8 after going missing from the 95,500 DWT DOUBLE DELIGHT (built in 2015) at Newcastle Anchorage.

其它 Others

没有 Nil

备注 Remark

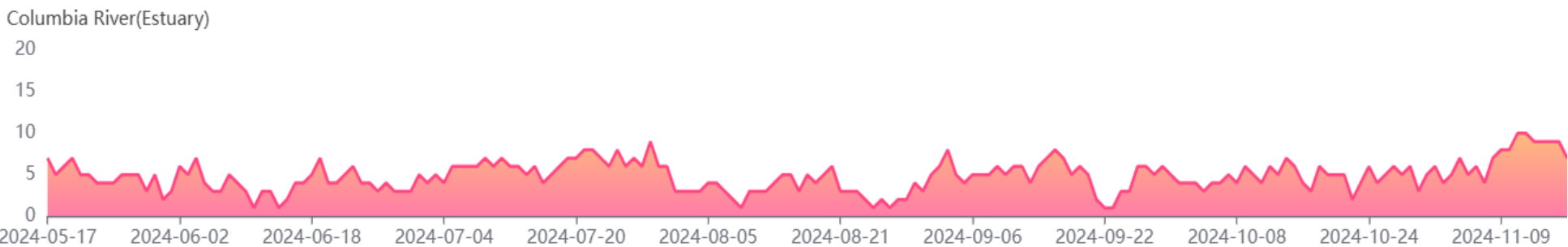
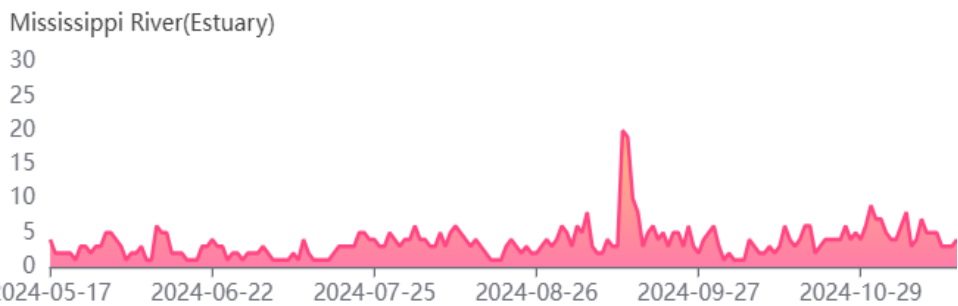
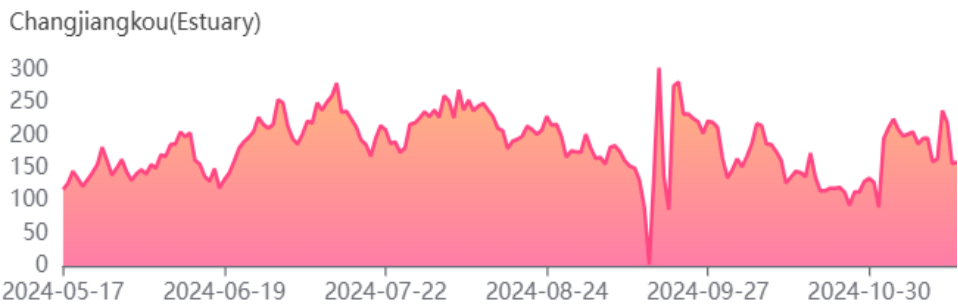
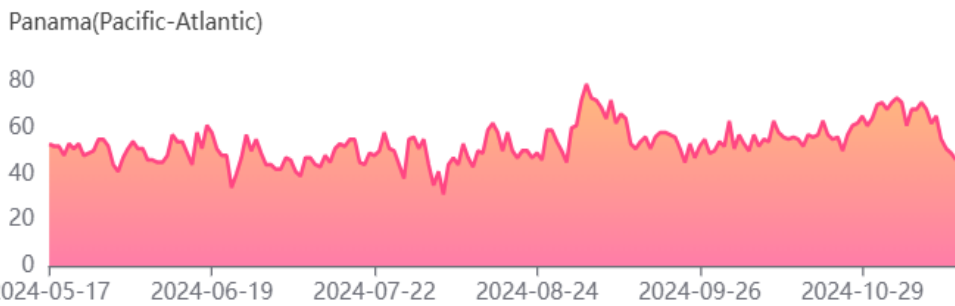
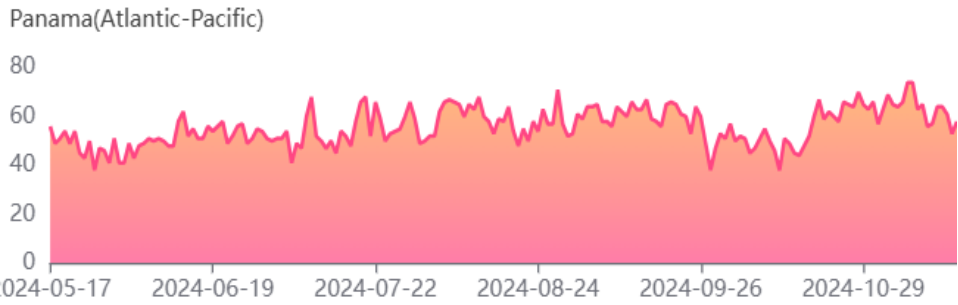
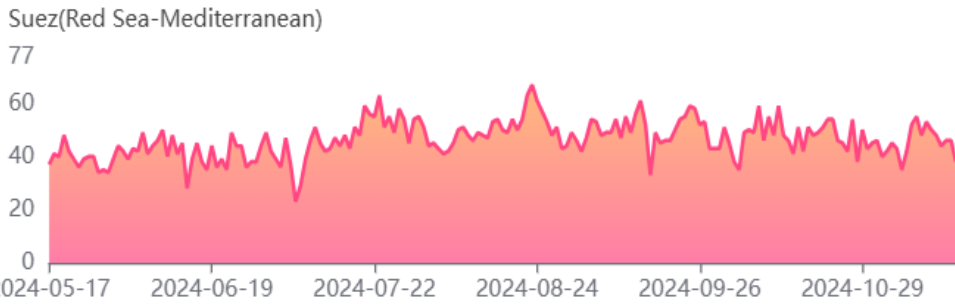
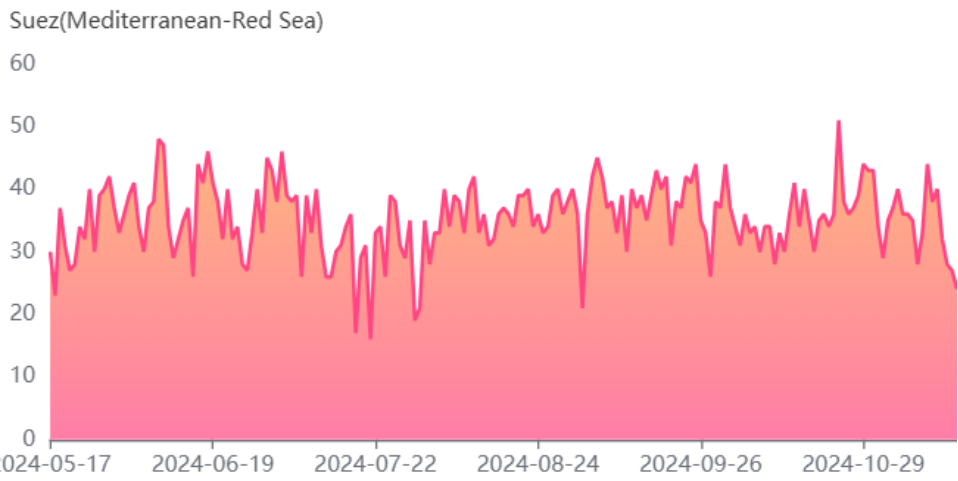
本报告数据截止时间为2024年11月17日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Nov 17th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	38	1344	11	-76
Miss.Riv.	4	138	-6	40
CJK	159	4624	-145	-519
Pa.Atlan.	58	1838	-62	344
Colum.Riv.	7	179	21	49
Suez.Med.	24	1048	-14	26
Pa.Pac.	46	1796	-84	231
ZJK	98	2898	12	2

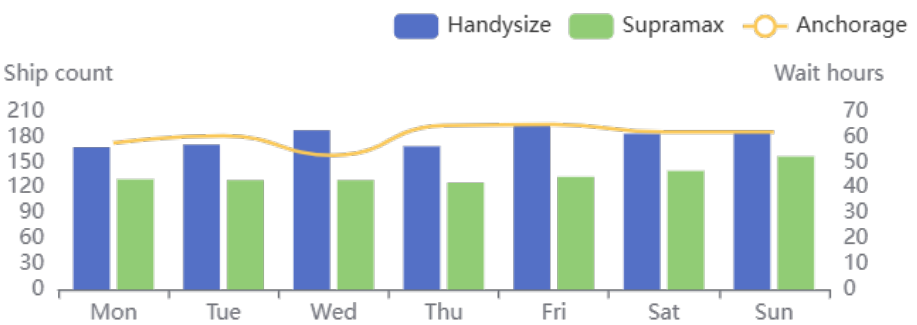


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

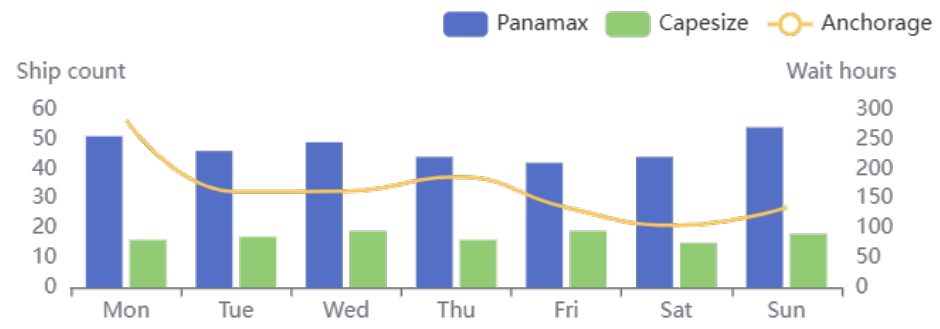
Type	M	T	W	Th	F	Sat	Sun
HDY	168	171	188	169	195	184	186
SMX	130	129	129	126	133	140	157
WT.h.	57.7	60.5	52.8	64.5	64.9	62	62



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

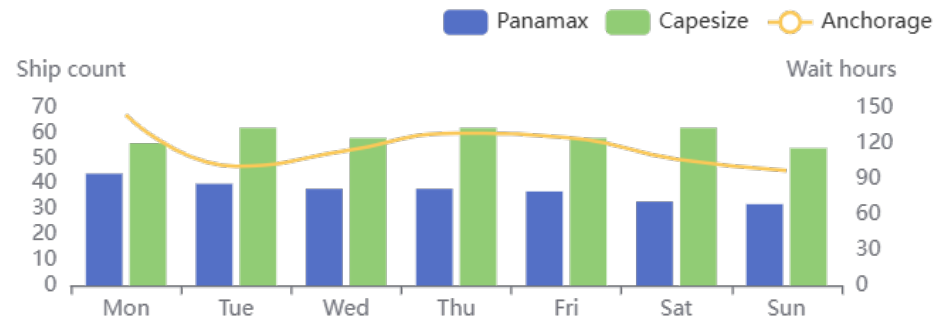
Type	M	T	W	Th	F	Sat	Sun
Pan.	51	46	49	44	42	44	54
Cap	16	17	19	16	19	15	18
WT.h.	282.2	161.6	162.5	186.5	134.8	104.8	135



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

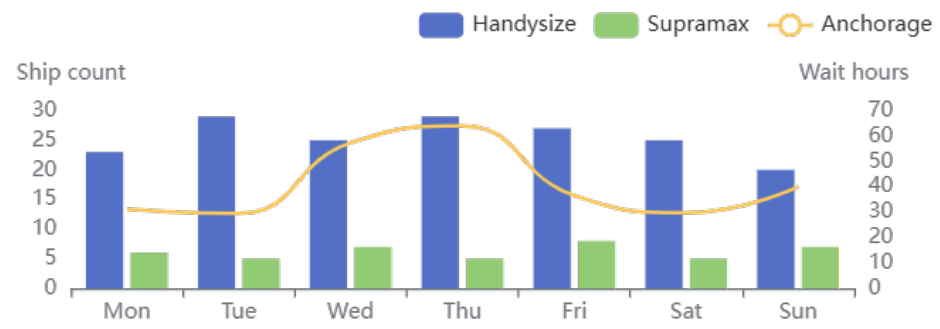
Type	M	T	W	Th	F	Sat	Sun
Pan.	44	40	38	38	37	33	32
Cap	56	62	58	62	58	62	54
WT.h.	143.8	100.6	113.7	128.4	124.8	106.6	97



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

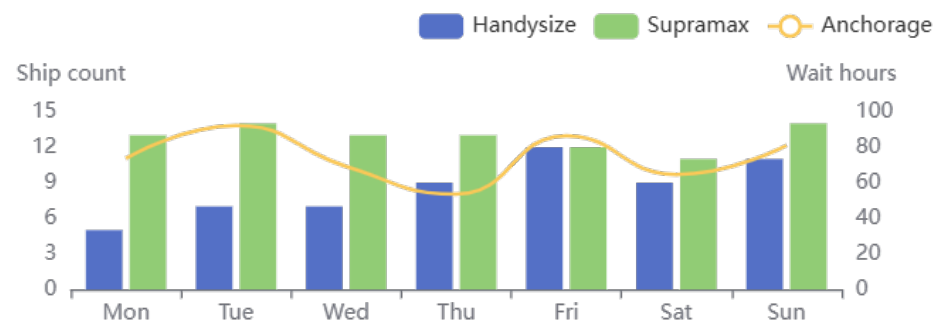
Type	M	T	W	Th	F	Sat	Sun
HDY	23	29	25	29	27	25	20
SMX	6	5	7	5	8	5	7
WT.h.	31.2	29.5	57.3	64	36.6	29.8	40



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

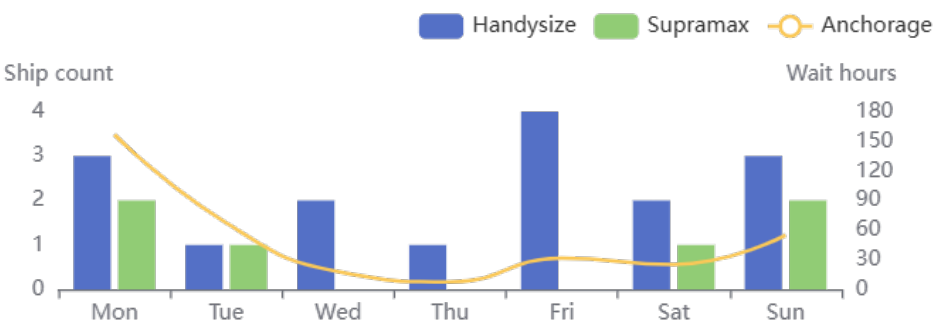
Type	M	T	W	Th	F	Sat	Sun
HDY	5	7	7	9	12	9	11
SMX	13	14	13	13	12	11	14
WT.h.	73.65	92.2	69.2	53.6	86.35	64.6	81



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

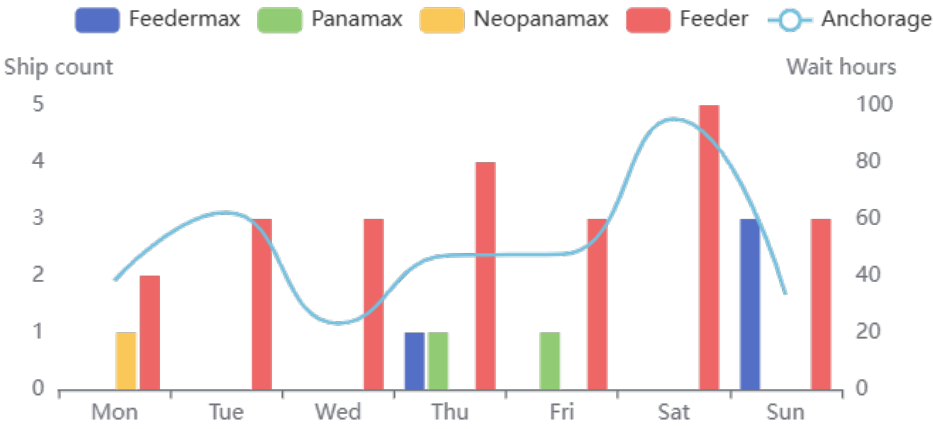
Type	M	T	W	Th	F	Sat	Sun
HDY	3	1	2	1	4	2	3
SMX	2	1	0	0	0	1	2
WT.h.	156.8	67.35	18	7.6	31.6	25.3	55



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

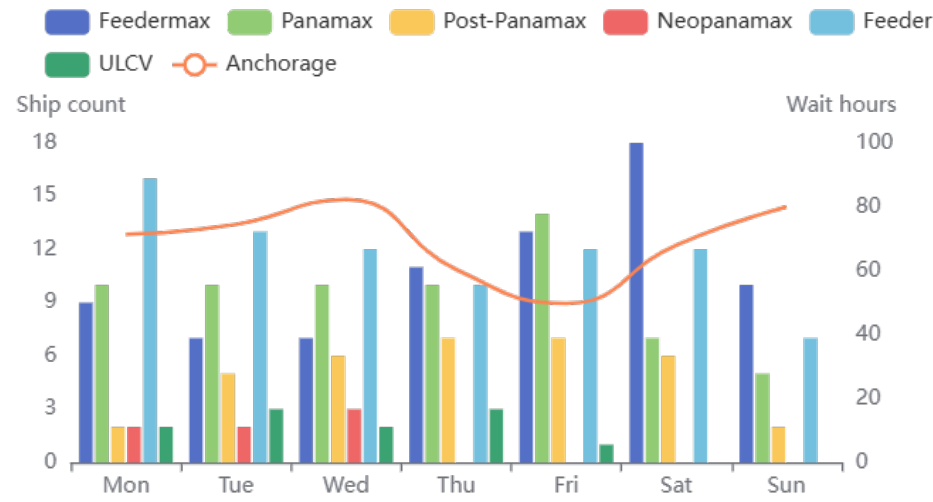
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	1	0	0	3
Pan.	0	0	0	1	1	0	0
PPx	0	0	0	0	0	0	0
NPx	1	0	0	0	0	0	0
Fd	2	3	3	4	3	5	3
WT.h.	38.3	62.3	23.3	47.3	47.6	95.3	33.5
Ulcw	0	0	0	0	0	0	0



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

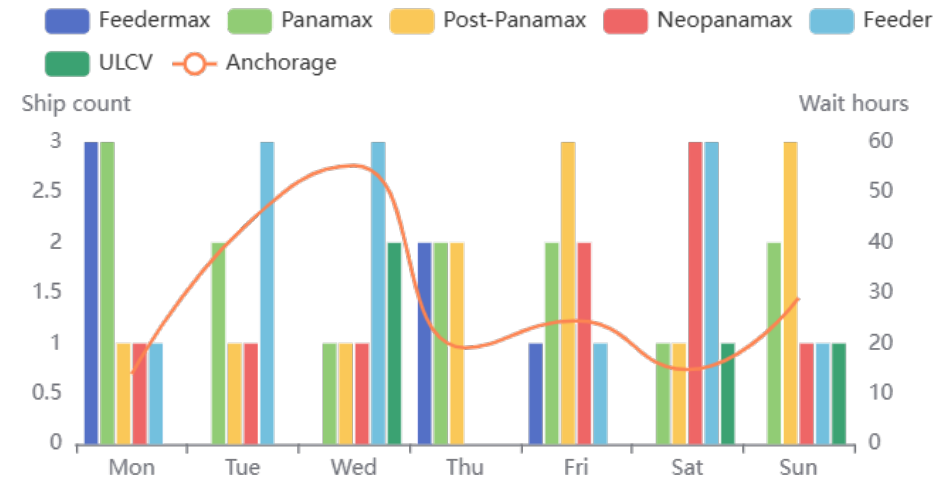
Type	M	T	W	Th	F	Sat	Sun
F.ma.	9	7	7	11	13	18	10
Pan.	10	10	10	10	14	7	5
PPx	2	5	6	7	7	6	2
NPx	2	2	3	0	0	0	0
Fd	16	13	12	10	12	12	7
Ulcw	2	3	2	3	1	0	0
WT.h.	71.4	74.5	82.3	60.4	49.8	68.1	80



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

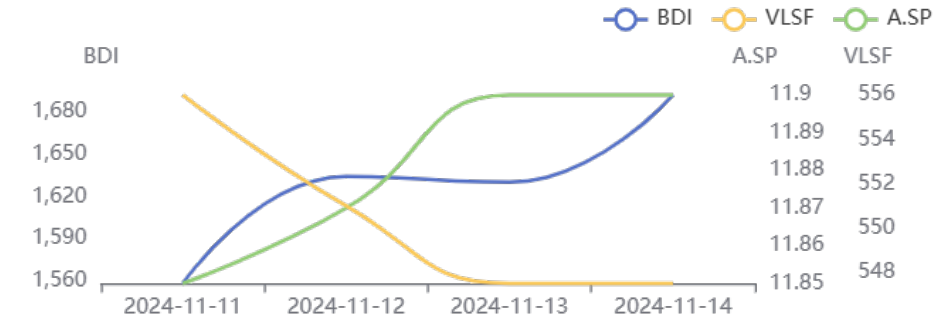
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	0	0	2	1	0	0
Pan.	3	2	1	2	2	1	2
PPx	1	1	1	2	3	1	3
NPx	1	1	1	0	2	3	1
Fd	1	3	3	0	1	3	1
Ulcw	0	0	2	0	0	1	1
WT.h.	13.9	42.9	55.35	19.15	24.5	14.8	29



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

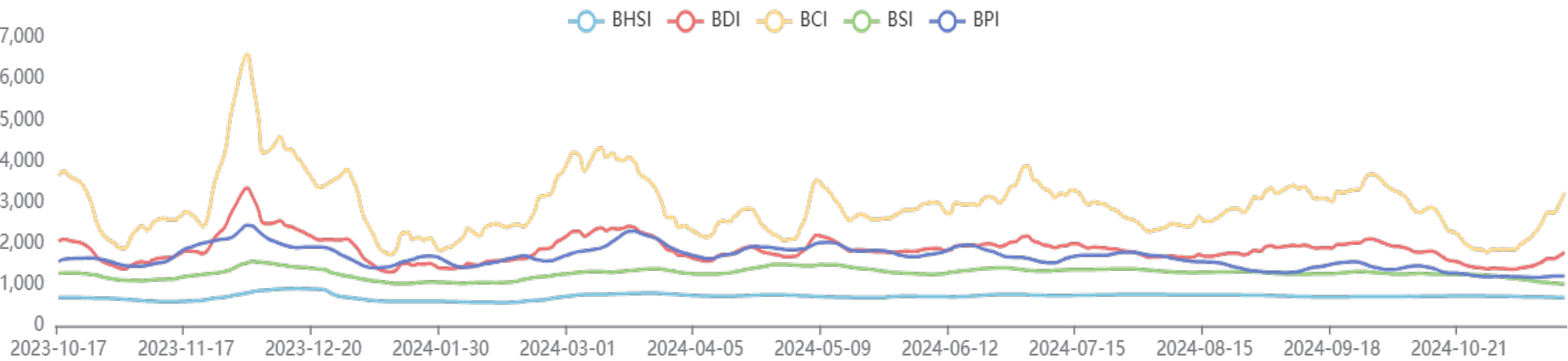
Type	M	T	W	Th	F	Sat	Sun
BDI	1064	1051	1036	1029			
VLSF	556.00	551.00	547.50	547.50			
A.SP	11.85	11.87	11.9	11.9	11.98	11.9	



第三部分 航运市场 SHIPPING MARKET

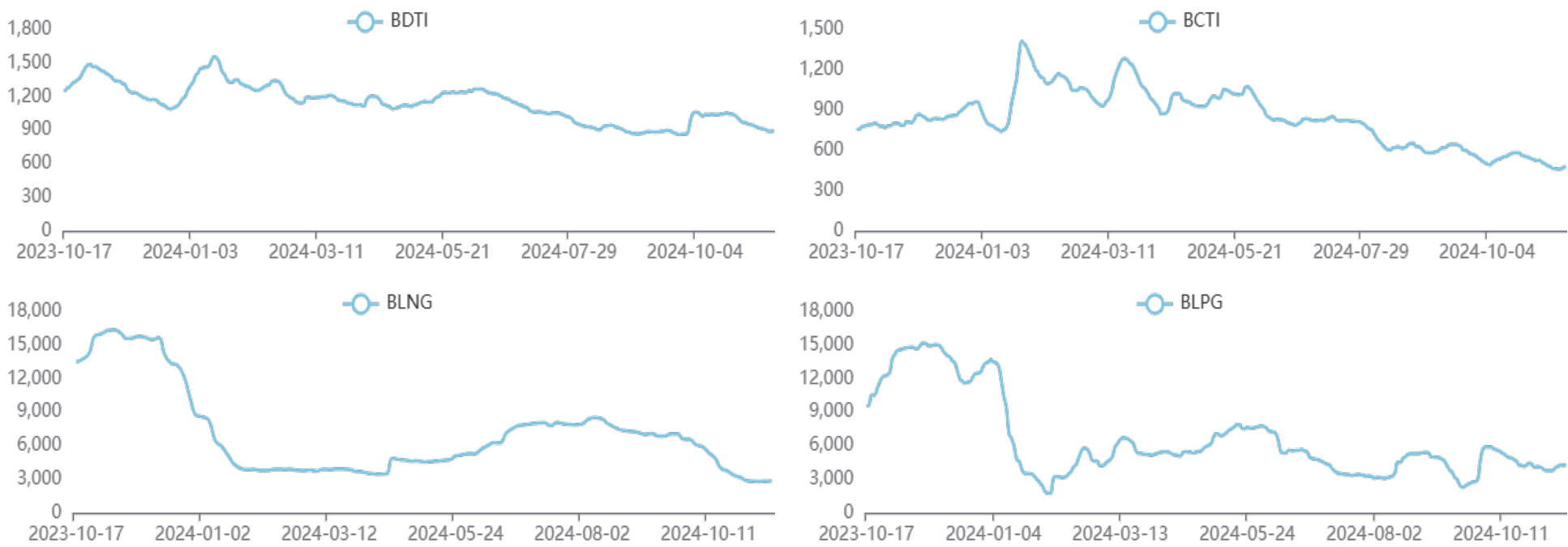
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1785	290.0	19.4	13.26	5.75
BCI	3229	913.0	39.42	41.87	25.45
BPI	1212	36.0	3.06	-5.68	-28.41
BSI	1019	-60.0	-5.56	-18.48	-10.69
BHSI	685	-18.0	-2.56	-5.78	16.5

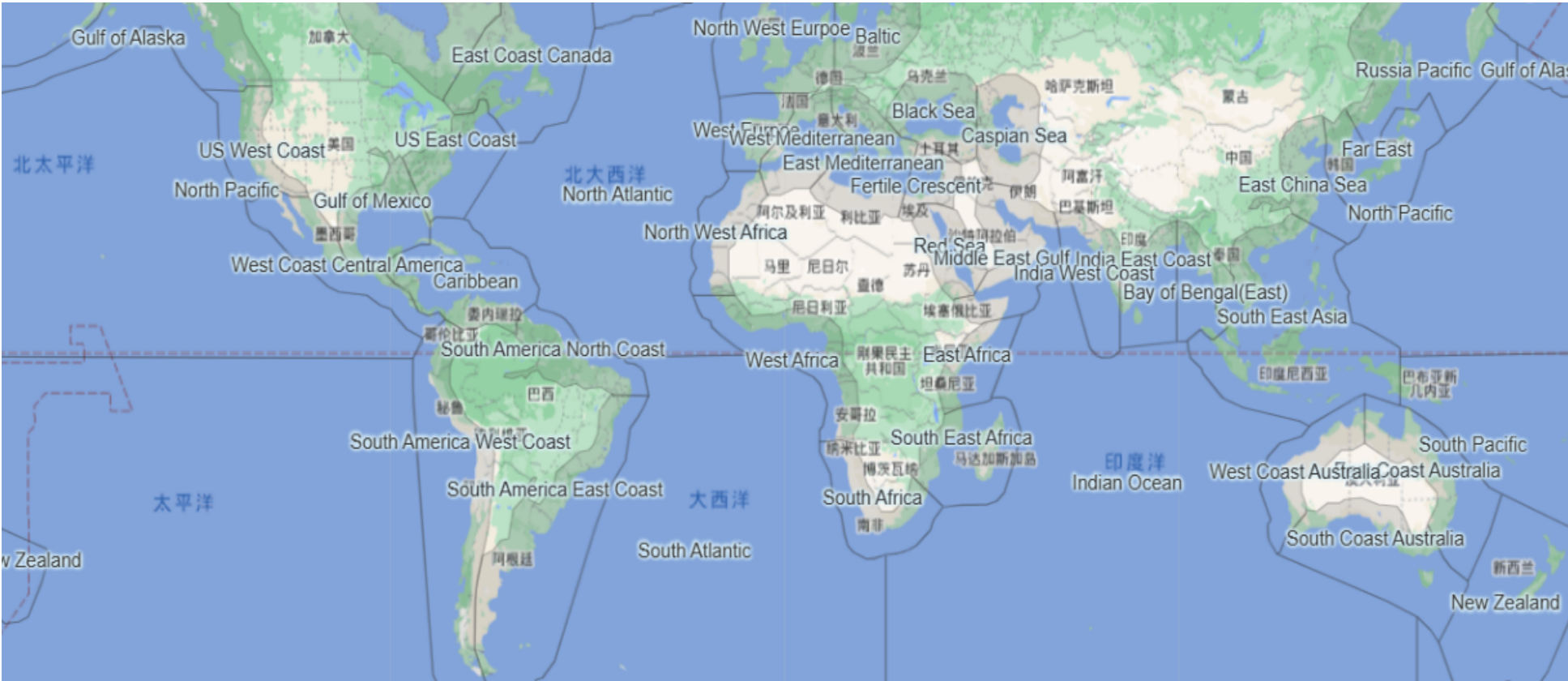


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	890	-23.0	-2.52	-14.67	-33.43
BCTI	477	11.0	2.36	-17.76	-40.97
BLNG	2860	67.0	2.4	-27.41	-81.7
BLPG	4297	491.0	12.9	-10.05	-70.77



第四部分 运力分布 SUPPLY DISTRIBUTION

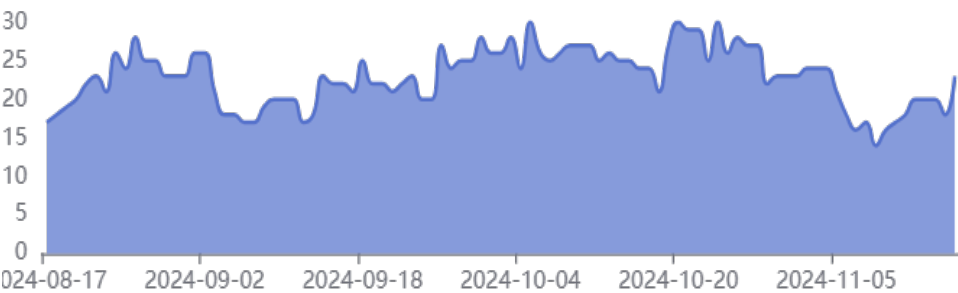


好望角型散货船 Capesize

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	17	18	20	20	20	18	23



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.

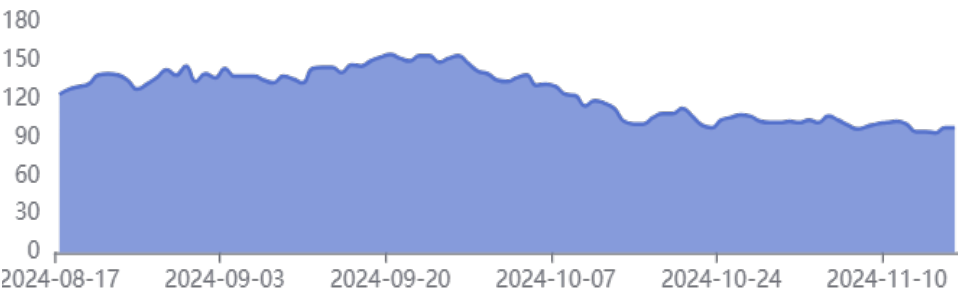
Type	M	T	W	Th	F	Sat	Sun
Cape	34	38	33	31	35	29	25

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.

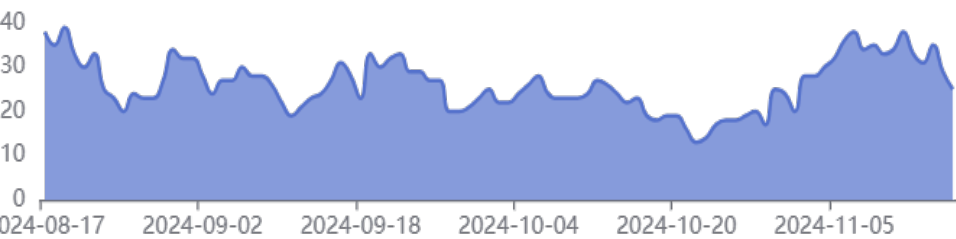
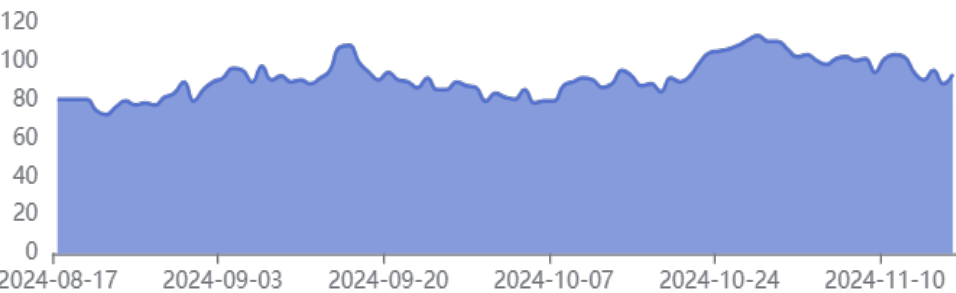
Type	M	T	W	Th	F	Sat	Sun
Pan.	102	100	94	94	93	97	97



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.

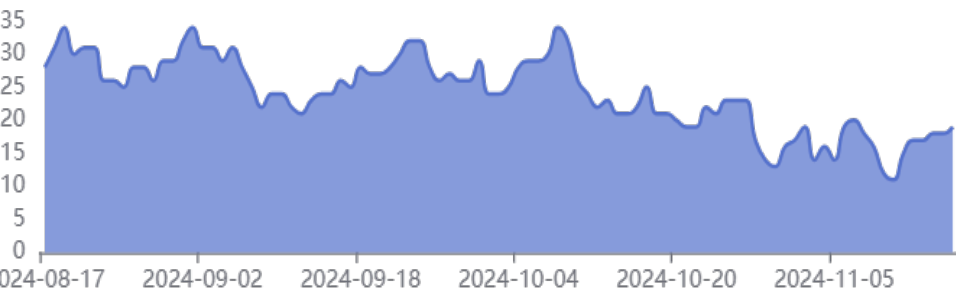
Type	M	T	W	Th	F	Sat	Sun
Cape	103	102	94	90	95	88	93



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.

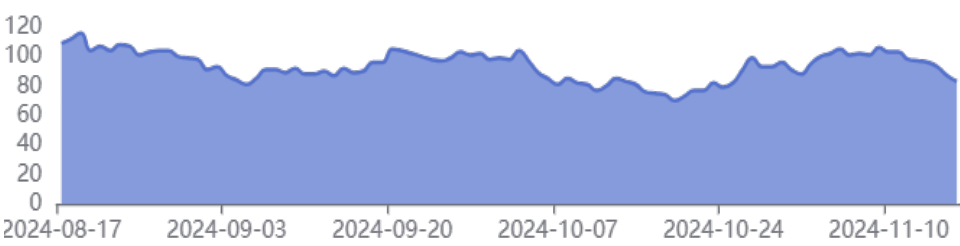
Type	M	T	W	Th	F	Sat	Sun
Pan.	17	15	14	16	17	18	17



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.	103	98	97	96	93	87	83

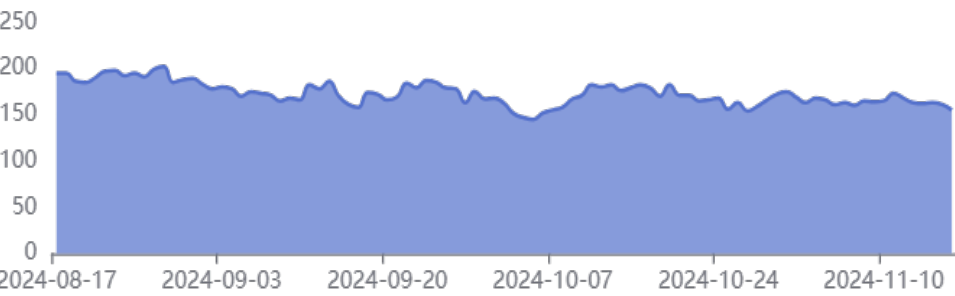


超大灵便型散货 SUPRAMAX

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.

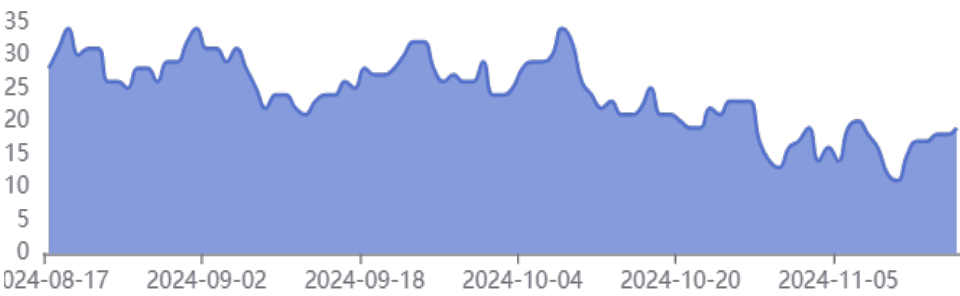
Type	M	T	W	Th	F	Sat	Sun
SMX	173	168	163	162	163	161	155



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.

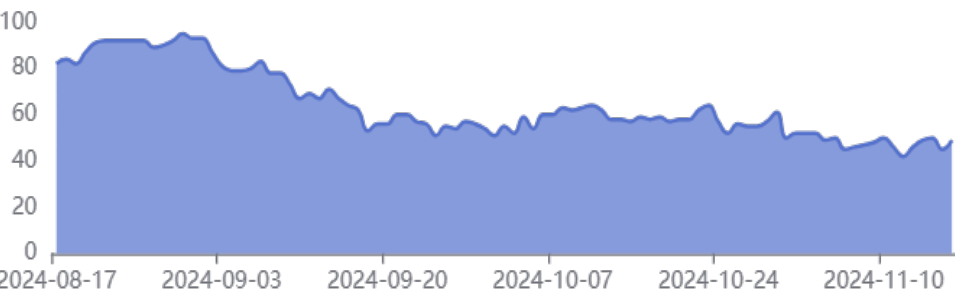
Type	M	T	W	Th	F	Sat	Sun
SMX	11	15	17	17	18	18	19



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.

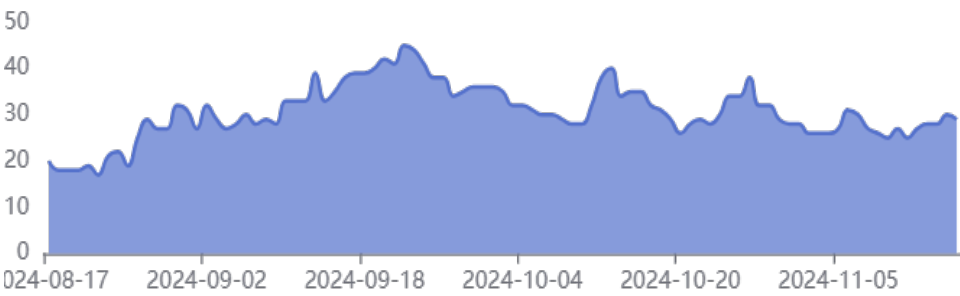
Type	M	T	W	Th	F	Sat	Sun
SMX	27	25	27	28	28	30	29



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.

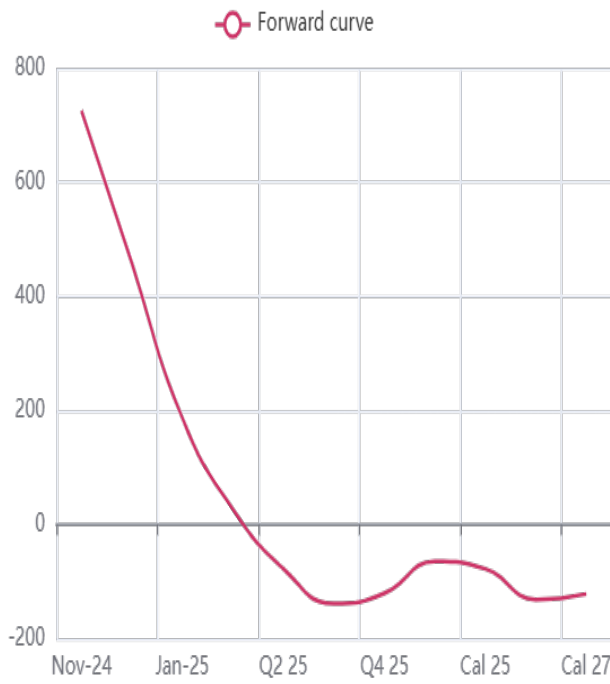
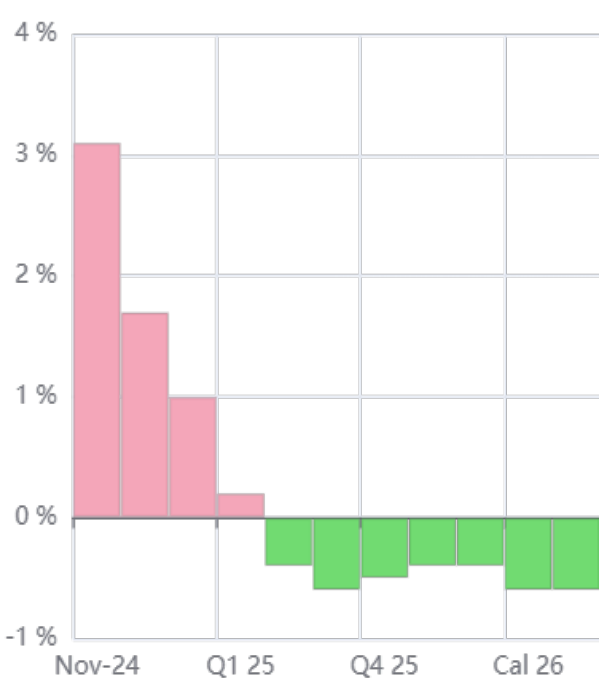
Type	M	T	W	Th	F	Sat	Sun
SMX	46	42	46	49	50	45	49



第五部分 远期运价协议 FFA

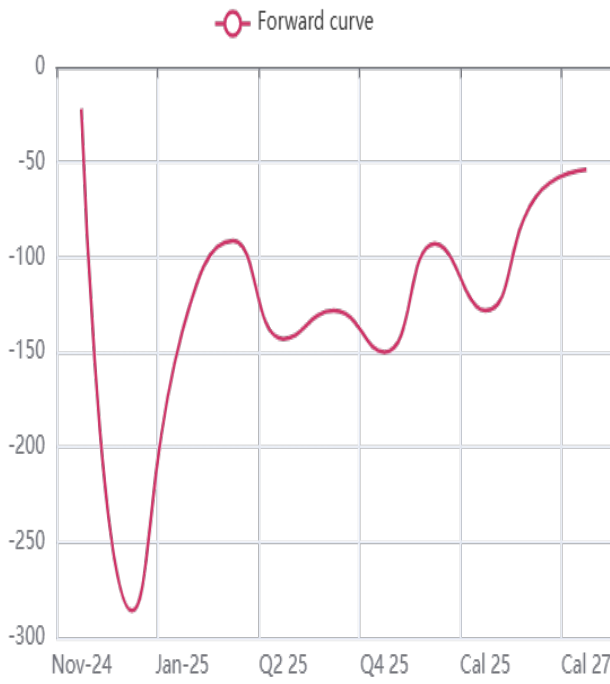
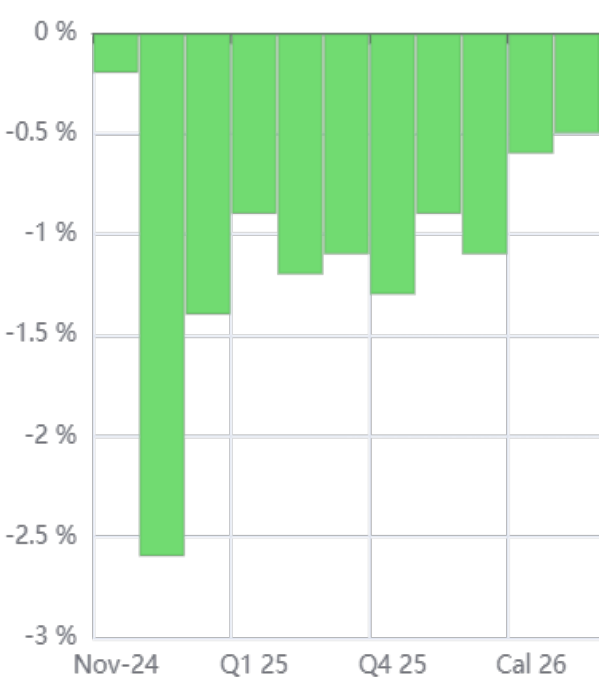
好望角型散货船Capesize

5TC	\$/day	WoW	
Nov-24	23,932.00	725.0	3.1 %
Dec-24	27,300.00	457.0	1.7 %
Jan-25	18,636.00	186.0	1.0 %
Q1 25	15,697.67	26.33	0.2 %
Q2 25	20,086.00	-78.0	-0.4 %
Q3 25	24,000.00	-139.0	-0.6 %
Q4 25	24,436.00	-121.0	-0.5 %
Q1 26	14,414.00	-65.0	-0.4 %
Cal 25	21,054.92	-77.92	-0.4 %
Cal 26	20,461.00	-132.0	-0.6 %
Cal 27	20,321.00	-122.0	-0.6 %



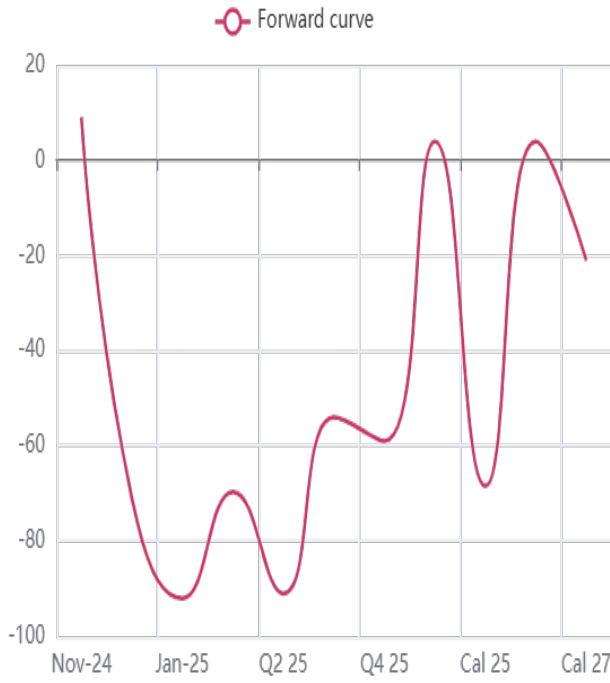
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Nov-24	9,749.00	-22.0	-0.2 %
Dec-24	10,707.00	-286.0	-2.6 %
Jan-25	9,607.00	-139.0	-1.4 %
Q1 25	9,922.67	-91.33	-0.9 %
Q2 25	12,096.33	-143.0	-1.2 %
Q3 25	11,936.00	-128.0	-1.1 %
Q4 25	11,671.00	-150.0	-1.3 %
Q1 26	10,371.00	-93.0	-0.9 %
Cal 25	11,406.50	-128.08	-1.1 %
Cal 26	11,121.00	-68.25	-0.6 %
Cal 27	11,271.00	-54.0	-0.5 %



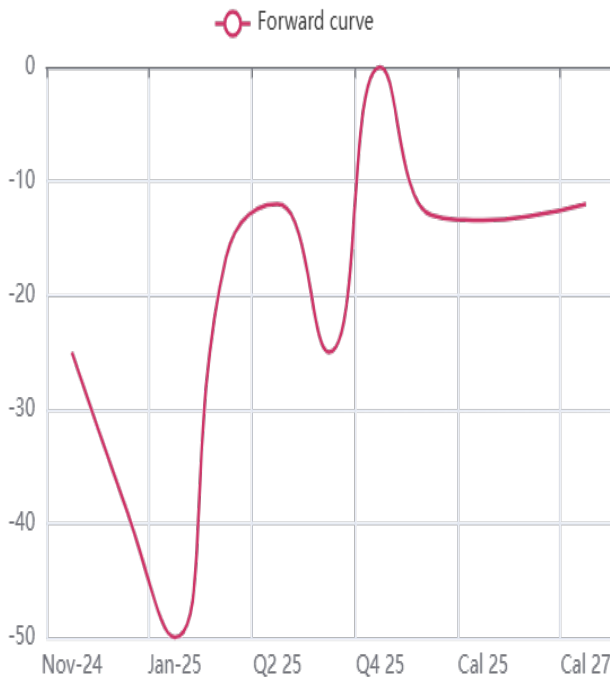
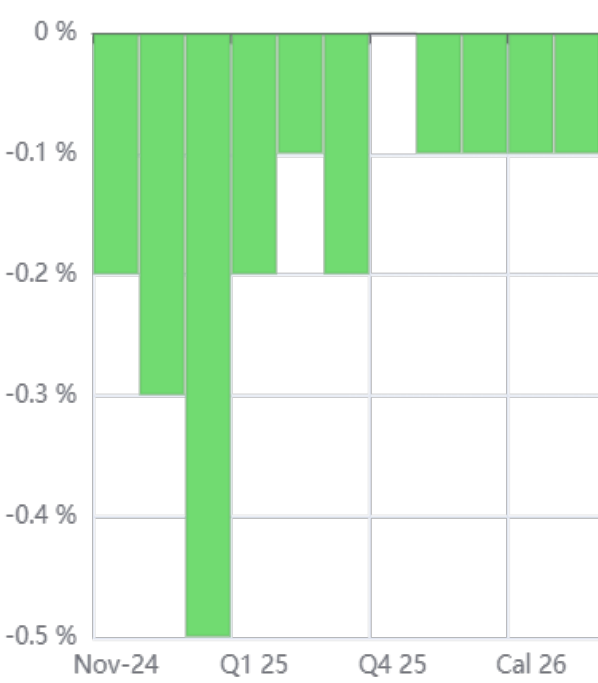
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Nov-24	11,292.00	9.0	0.1 %
Dec-24	11,342.00	-71.0	-0.6 %
Jan-25	10,308.00	-92.0	-0.9 %
Q1 25	10,370.67	-69.67	-0.7 %
Q2 25	12,192.00	-91.0	-0.7 %
Q3 25	12,150.00	-54.0	-0.4 %
Q4 25	11,958.00	-59.0	-0.5 %
Q1 26	11,329.00	4.0	0.0 %
11,667.67	Cal 25	-68.42	-0.6 %
Cal 26	11,329.00	4.0	0.0 %
Cal 27	11,379.00	-21.0	-0.2 %



灵便型散货船Handysize

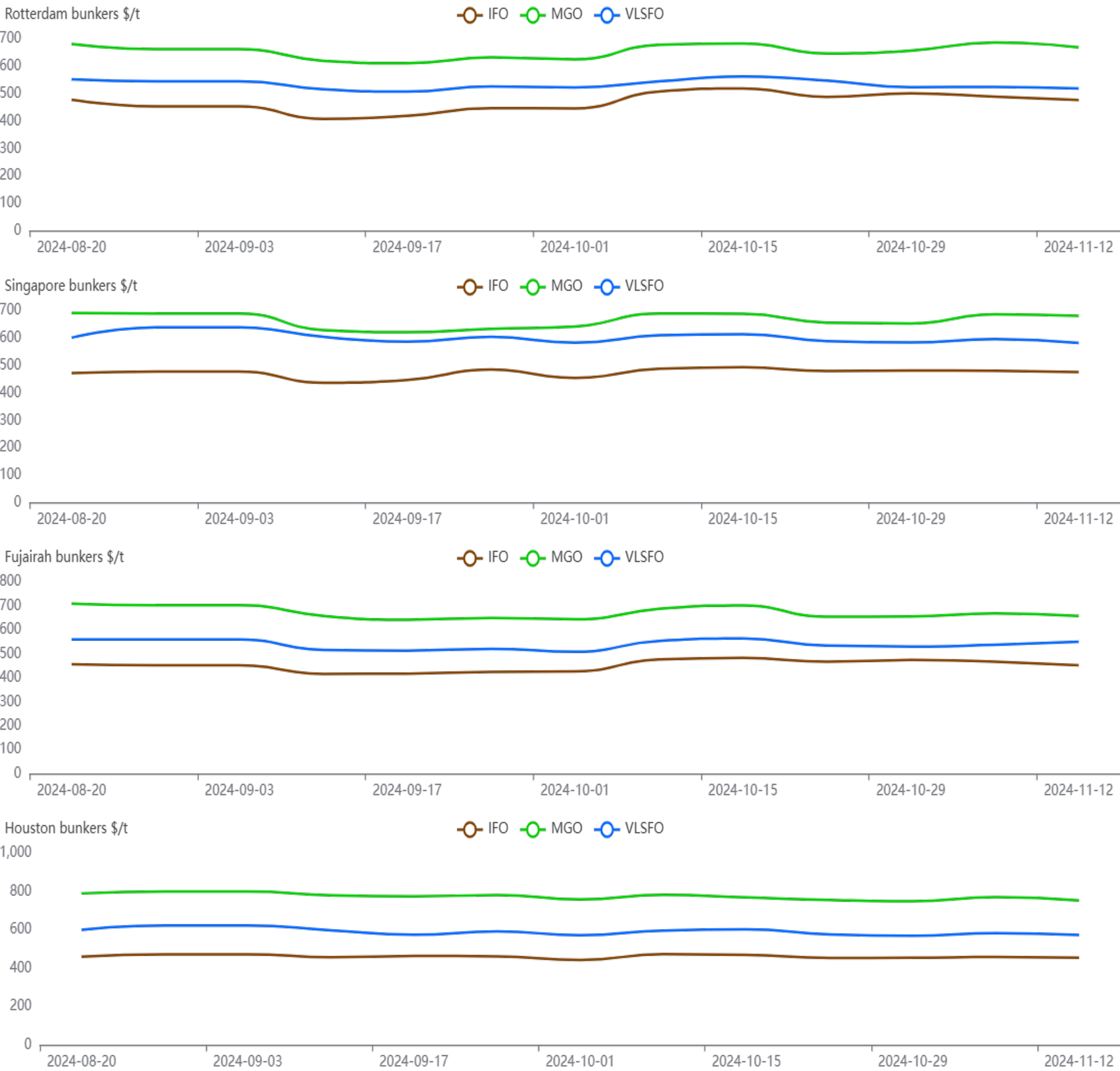
7TC	\$/day	WoW	
Nov-24	12,313.00	-25.0	-0.2 %
Dec-24	12,100.00	-38.0	-0.3 %
Jan-25	9,825.00	-50.0	-0.5 %
Q1 25	9,896.00	-16.67	-0.2 %
Q2 25	11,638.00	-12.0	-0.1 %
Q3 25	11,475.00	-25.0	-0.2 %
Q4 25	11,438.00	0.0	0.0
Q1 26	10,900.00	-13.0	-0.1 %
Cal 25	11,111.75	-13.42	-0.1 %
Cal 26	10,900.00	-13.0	-0.1 %
Cal 27	10,913.00	-12.0	-0.1 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	592.5	482.5	694.5	110.0	-11.0	-9.09	-10.57
Singapore	582.5	476.0	681.0	106.5	-8.5	-7.39	-11.98
Rotterdam	519.0	476.5	669.0	42.5	7.0	19.72	-2.3
Fujairah	550.0	452.0	658.5	98.0	27.0	38.03	20.99
Houston	573.0	454.5	753.5	118.5	-5.5	-4.44	-11.24

(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	203.0		-2.0	-0.98	-4.25	-10.14
Maize	226.0		4.0	1.8	1.35	-0.96
Soybeans	218.0		7.0	3.32	2.83	-16.95
Rice	214.0		0.0	0.0	-4.46	-11.52
Barley	216.0		0.0	0.0	-0.46	-3.42
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	67.96	-3.67	-5.12	-3.7	-16.71
Brent	USD/Bbl	71.65	-3.61	-4.8	-3.33	-16.68
Natural Gas	USD/MMBtu	2.94	0.15	5.38	19.03	-13.27
Gasoline	USD/Gal	1.96	-0.07	-3.45	-3.45	-12.11
Heating Oil	USD/Gal	2.19	-0.1	-4.37	-0.45	-25.26
Ethanol	USD/Gal	1.58	0.01	0.64	3.95	-17.71
Naphtha	USD/T	627.72	-25.14	-3.85	-5.51	0.43
Propane	USD/Gal	0.8	-0.01	-1.23	11.11	25.0
Uranium	USD/Lbs	76.55	-1.65	-2.11	-7.72	3.45
Methanol	CNY/T	2467.0	-5.0	-0.2	-0.48	0.37
TTF Gas	EUR/MWh	43.99	3.11	7.61	11.0	-4.82
UK Gas	GBp/thm	110.98	7.35	7.09	13.0	-6.31
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.22	-0.2	-4.52	-2.09	14.67
Coal	USD/T	142.25	-1.65	-1.15	-5.73	16.12
Steel	CNY/T	3238.0	-94.0	-2.82	-4.23	-15.74
Iron Ore	USD/T	103.82	-0.09	-0.09	-3.07	-17.27
Aluminum	USD/T	2562.5	-80.0	-3.03	0.49	13.13
Lithium	CNY/T	72500.0	0.0	0.0	-2.68	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2622.36	-111.09	-4.06	-1.19	32.06
Silver	USD/t.oz	30.62	-1.85	-5.7	-1.83	32.1
Platium	null	956.7	-28.0	-2.84	-2.53	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.06		-0.03	-2.75	-2.75	-0.93
USD/CNY	7.24		0.13	1.83	1.69	-0.55

第八部分 本周话题 WEEKLY TOPIC



胡塞武装红海袭击导致埃及收入减少60亿美元

在今年11月初胡塞武装誓言，他们将继续追捕他们认为与以色列有关联的船只，即使这些船只已出售给第三方利益集团，胡塞武装并誓言继续实施红海封锁。也门反政府组织的发言人叶海亚·萨里说，任何企图通过将船舶转让给第三方，或通过改变船舶的所有权、旗帜或注册来绕过他们对以色列贸易的封锁的企图都是徒劳的。声明强调，胡塞武装将把这些船舶资产保留在他们的目标清单上。胡塞武装的目标范围很广，不仅包括以色列、美国和英国直接拥有的船只，还包括与以色列有贸易往来的船只，甚至包括与以色列有贸易往来的公司的船只。

自去年11月胡塞武装开始针对以色列在加沙采取军事行动以来，已有100多艘船只在红海或亚丁湾遭到胡塞武装的袭击。胡塞武装使用了导弹、空中和海上无人驾驶飞机，还从小船上向商船开火。胡塞武装在前几个月还击沉了两艘商船，造成四名海员死亡，两人重伤。据其它媒体报告称，胡塞武装在扩大袭击范围时开始使用俄罗斯的卫星数据。这些数据是通过伊朗伊斯兰革命卫队（Islamic Revolutionary Guard Corps）的成员传递给也门胡塞武装的。

由于胡塞武装的袭击，从红海改道的船只给埃及造成了严重的经济损失。据埃及媒体报道，该国外交部长巴德尔·阿卜杜勒·阿提（Badr Abdel Aati）表示，苏伊士运河过境的大幅减少造成了60亿美元的运河通行费收入损失。该部长会见了国际海事组织秘书长Arsenio Dominguez，还讨论了这个问题。

自去年11月胡塞武装开始实施红海袭击商船以来，到目前已经有超过百艘商船遭到袭击，大部分集装箱船舶和其它船型纷纷选择绕航好望角。据hiFleet航运大数据显示，苏伊士运河的船舶通行水平与2023年的平均水平相比，通过苏伊士运河过境的船舶总吨数量下降超过70%。集装箱船、汽车运输船、游轮和液化天然气运输船通过苏伊士运河的数量更是下降了约90%或更多。

市场有报告分析，莫斯科正在助长中东的不稳定，以淡化美国对乌克兰的关注。俄罗斯欧亚中心智库主任亚历山大·加布耶夫告诉《华尔街日报》：“对俄罗斯来说，任何地方的任何冲突都是好消息，因为这将使世界的注意力远离乌克兰，美国需要在其它地区投入更多资源，而且随着中东局势的恶化，美国将选择哪里很明显。”

In early November this year, the Houthis vowed that they would continue to hunt down ships they believe are linked to Israel, even if they have been sold to third-party interests, and vowed to maintain a blockade of the Red Sea. Yahya Sari, a spokesman for the Yemeni rebel group, said any attempt to bypass their blockade of Israeli trade by transferring the ships to a third party or by changing the ownership, flag or registration of the ships would be futile. The statement stressed that the Houthis will keep these ship assets on their target list. The Houthis have targeted a wide range of vessels, including not only those directly owned by Israel, the United States and the United Kingdom, but also those that trade with Israel and even those of companies that trade with Israel.

More than 100 ships have been attacked by the Houthis in the Red Sea or Gulf of Aden since they began their military operation against Israel in Gaza in November. The Houthis have used missiles, air and sea drones and fired on commercial vessels from small boats. The Houthis have also sunk two commercial vessels in previous months, killing four sailors and seriously injuring two others. According to other media reports, the Houthis began using Russian satellite data as they expanded their attacks. The data was passed to the Houthis in Yemen through members of Iran's Islamic Revolutionary Guard Corps.

Ships diverted from the Red Sea due to Houthi attacks have caused serious economic losses to Egypt. According to Egyptian media reports, the country's Foreign Minister, Badr Abdel Aati, said that the drastic reduction in Suez Canal crossings had caused a loss of \$6 billion in canal toll revenue. The minister met with the Secretary-General of the International Maritime Organization, Arsenio Dominguez, who also discussed the issue.

Since the Houthis began attacking commercial vessels in the Red Sea in November last year, more than 100 commercial vessels have been attacked so far, most container ships and other ship types have chosen to sail around the Cape of Good Hope. According to hiFleet Shipping Big Data, the level of ship traffic in the Suez Canal has decreased by more than 70% in the total tonnage of ships transacting through the Suez Canal compared to the average level in 2023. The number of container ships, car carriers, cruise ships and liquefied natural gas carriers passing through the Suez Canal has fallen by about 90 percent or more.

Moscow is fueling instability in the Middle East in order to downplay U.S. concerns about Ukraine. "Any conflict anywhere is good news for Russia because it will take the world's attention away from Ukraine, the US needs to invest more resources in other regions, and as the situation in the Middle East deteriorates, it is clear where the US will choose," Alexander Gabuyev, director of the Russian Eurasia Center think tank, told the Wall Street Journal.

