



2024年 第47周市场周报

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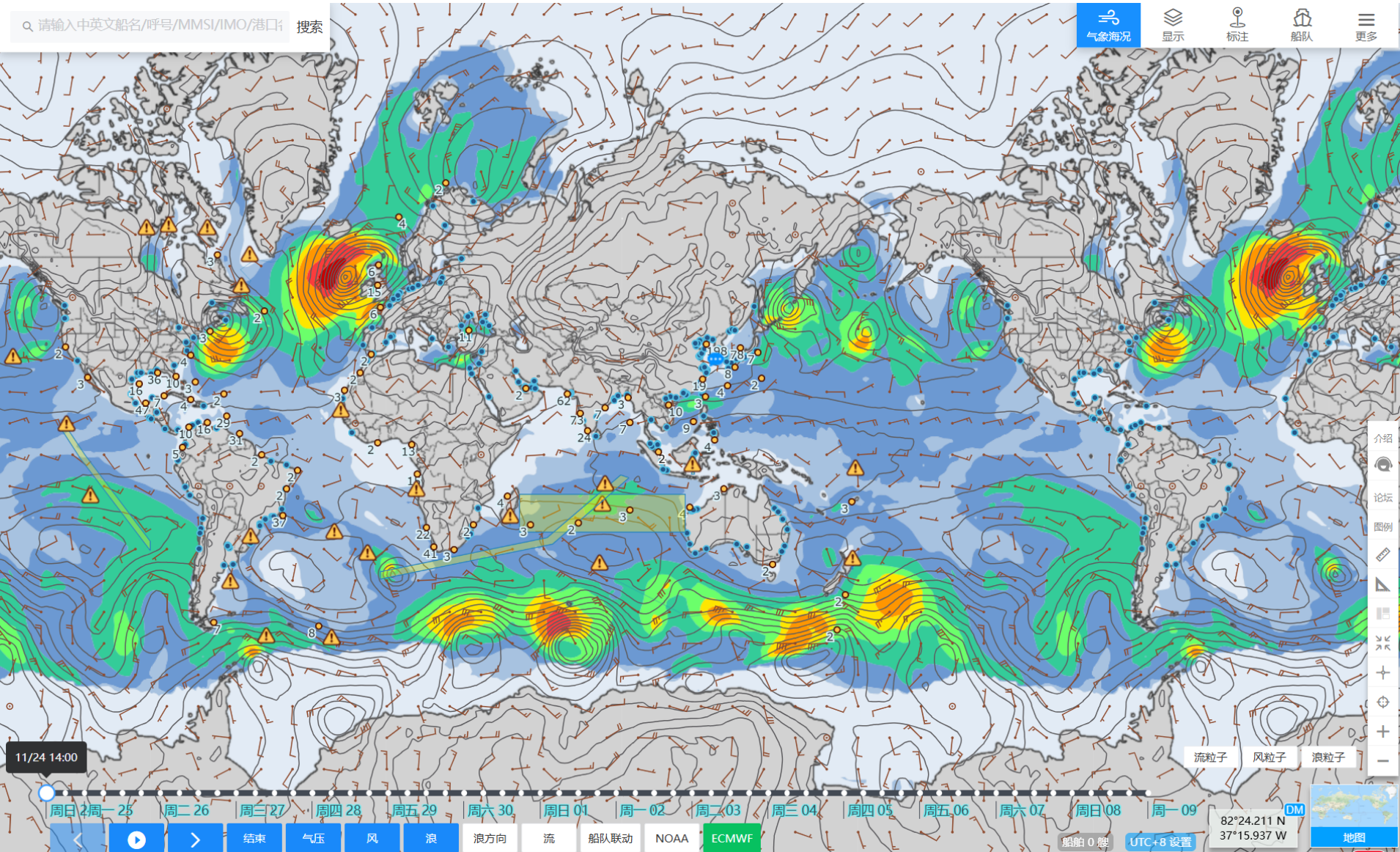
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第八部分

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1036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 1036 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5-6级，相关海域中浪；黄海风力4-7级变强的过程，相关海域大浪；东海风力4-6级，由弱增强，相关海域经历大浪；台湾海峡7-4级风，由强变弱，台湾海峡后经历大浪；南海大部海域风力6-7级，相关海域大浪。The coming week the wind in Bohai Sea is becoming strong with moderate sea. Yellow Sea will be strengthened to near gale with rough sea. And China East Sea will become strong as well with rough wave. The wind in the Taiwan Strait will become weaker from near gale with rough wave. In most of the South China Sea the wind will be strong with rough wave.

海盗事件 Piracy

11月12号，新加坡海峡船上的值班人员在机舱内发现了三名持枪和长刀的劫匪。警报发出并通知VTIS。海岸警卫队护送并登船进行调查。发动机备件报失。12.11.2024: 1720 UTC: Posn: 01:02.77N – 103:39.45E, Singapore Straits. Duty crew on the ship underway spotted three robbers armed with guns and long knives inside the engine room. Alarm raised and VTIS notified. The Coast Guard escorted and boarded the ship for investigation. Engine spare parts were reported stolen.

海上事件 Marine Incidents

11月14号，一名46岁的船长在希腊被捕，四天前，他驾驶的多用途船只在他醉酒的情况下撞上了礁石。岸警卫队在一份声明中表示，根据希腊有关海上事故的法律，包括驾驶台当值时饮酒的法律，这名乌克兰船长被拘留。On November 14th a 46-year-old captain was arrested in Greece, four days after his multi-purpose boat crashed into a rock while he was drunk. The Coast Guard said in a statement that the Ukrainian captain was detained in accordance with Greek laws on accidents at sea, including laws on drinking alcohol while on bridge duty.

其它 Others

没有 Nil

备注 Remark

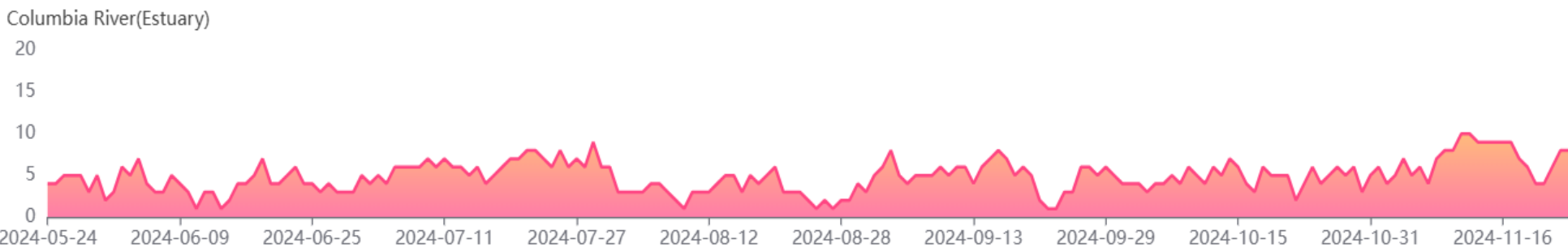
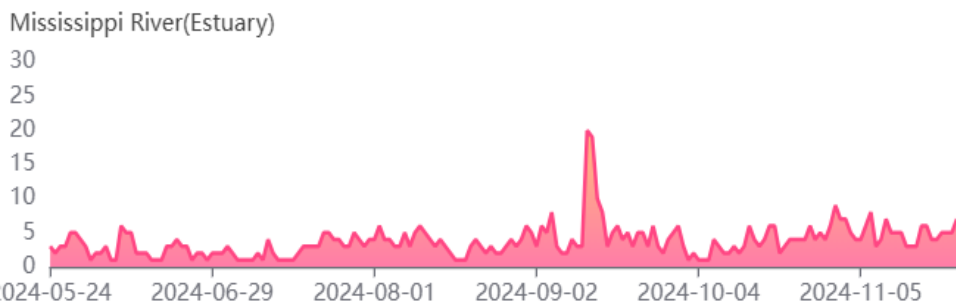
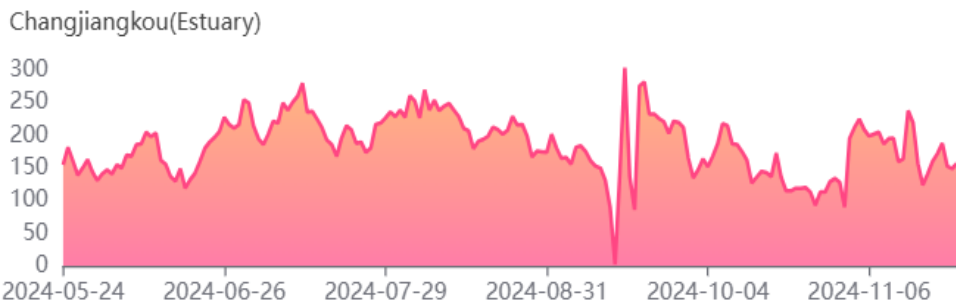
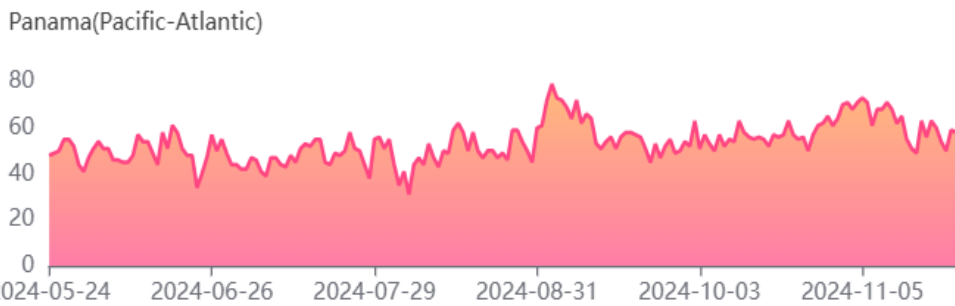
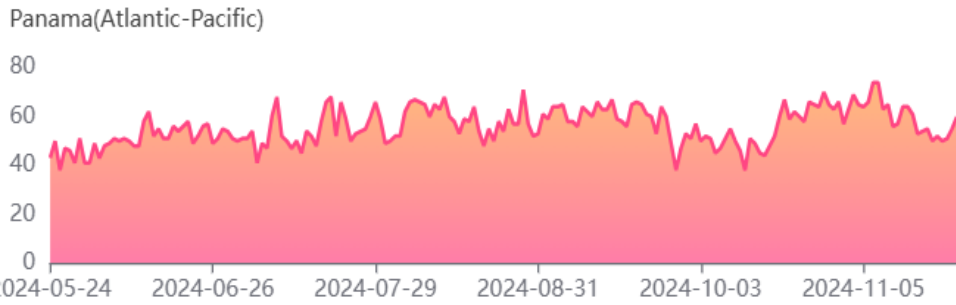
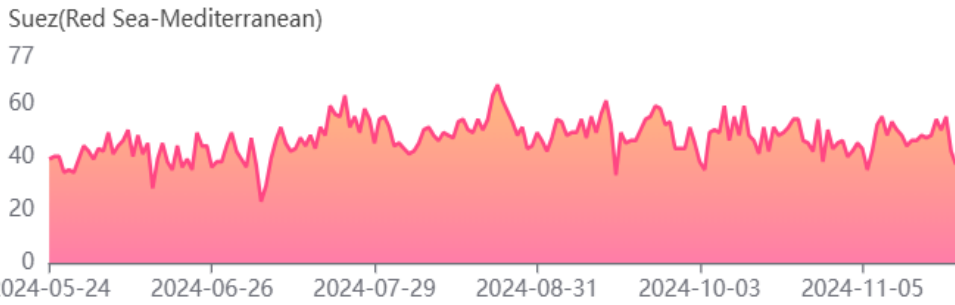
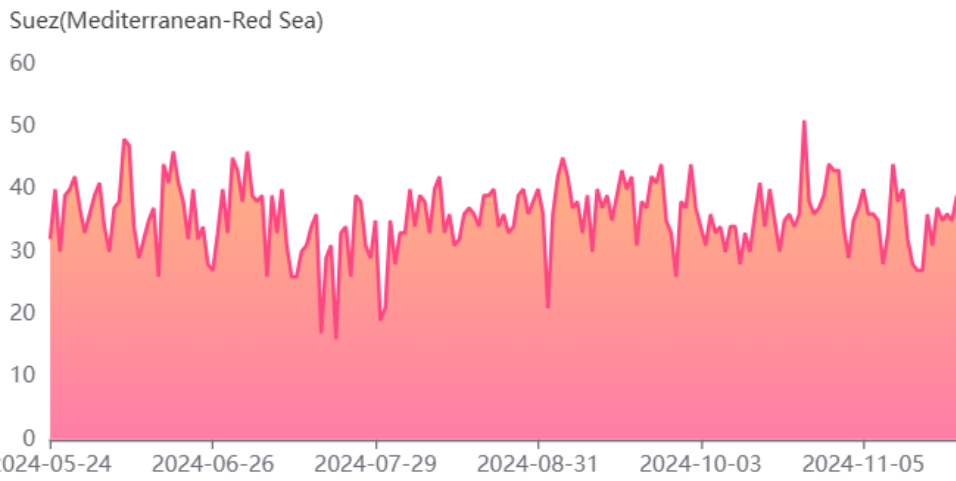
本报告数据截止时间为2024年11月24日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Nov 24th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	37	1346	-2	-46
Miss.Riv.	7	149	5	50
CJK	157	4915	-210	538
Pa.Atlan.	60	1770	-47	227
Colum.Riv.	8	193	-21	56
Suez.Med.	39	1034	7	2
Pa.Pac.	58	1818	-21	206
ZJK	74	2930	-30	-67

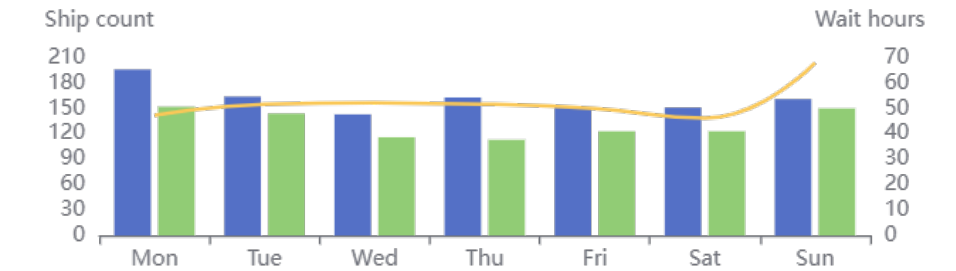
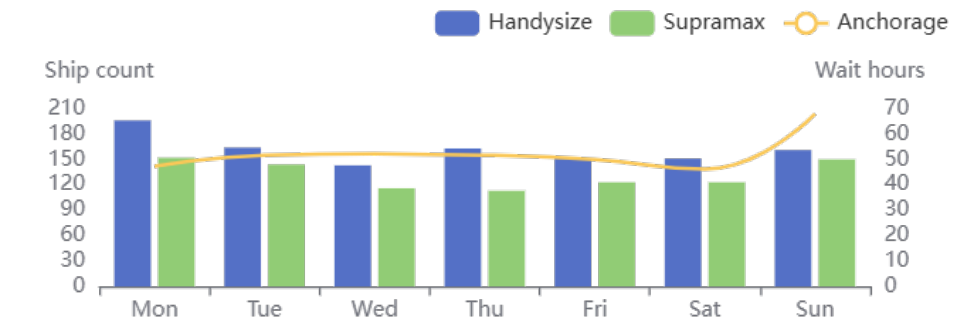


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

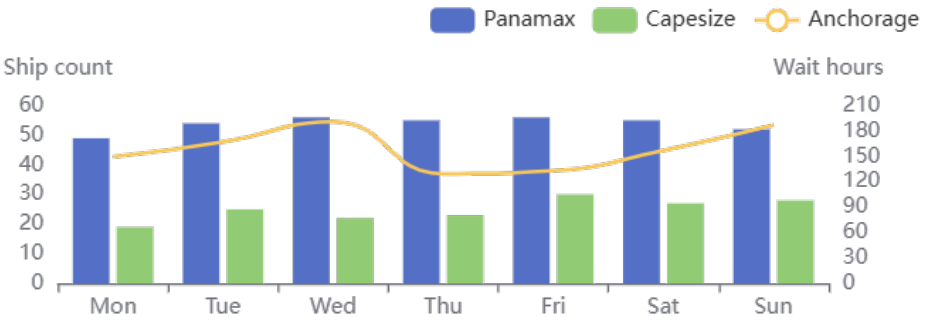
Type	M	T	W	Th	F	Sat	Sun
HDY	196	164	143	163	151	151	161
SMX	152	144	116	113	123	123	150
WT.h.	47.3	51.6	52.2	51.7	50	46.2	68



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

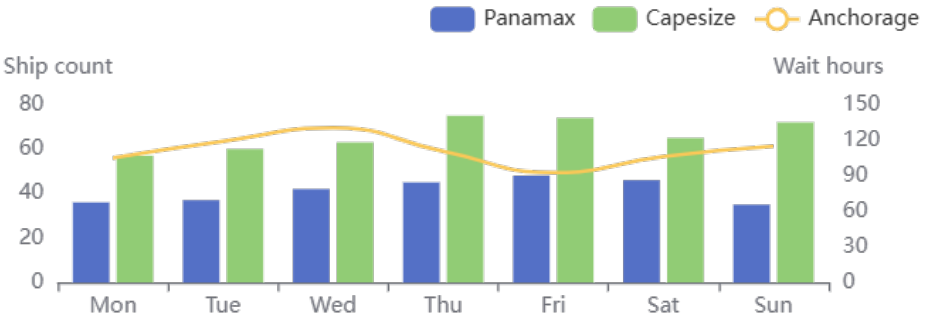
Type	M	T	W	Th	F	Sat	Sun
Pan.	49	54	56	55	56	55	52
Cap	19	25	22	23	30	27	28
WT.h.	149.5	167	191	129.5	133.2	157.2	187



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

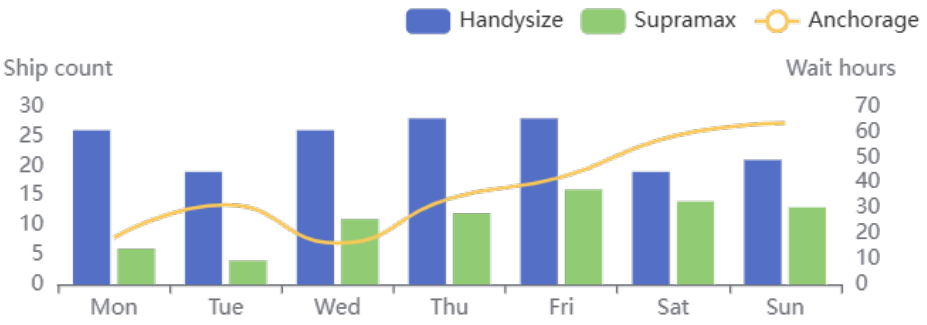
Type	M	T	W	Th	F	Sat	Sun
Pan.	36	37	42	45	48	46	35
Cap	57	60	63	75	74	65	72
WT.h.	105.1	119.1	130.5	110.7	92.65	106.2	115



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

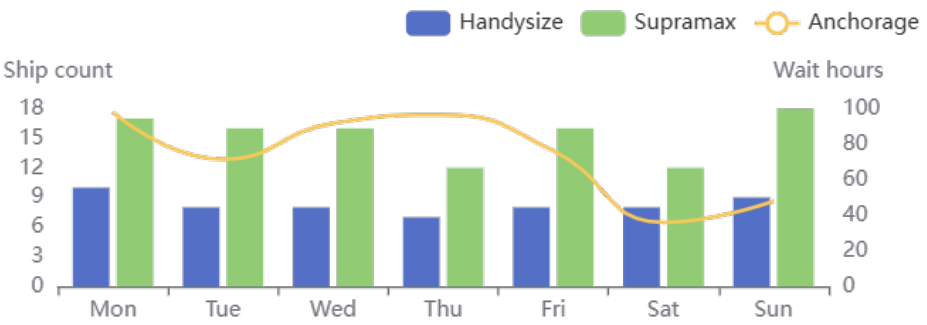
Type	M	T	W	Th	F	Sat	Sun
HDY	26	19	26	28	28	19	21
SMX	6	4	11	12	16	14	13
WT.h.	18.4	31.4	16.2	33.8	42.2	58.4	63.5



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

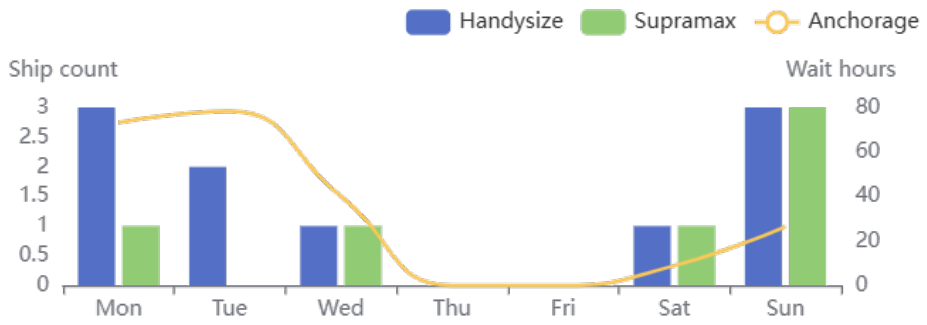
Type	M	T	W	Th	F	Sat	Sun
HDY	10	8	8	7	8	8	9
SMX	17	16	16	12	16	12	18
WT.h.	97.9	71.55	91.8	96.6	76.3	36	48



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

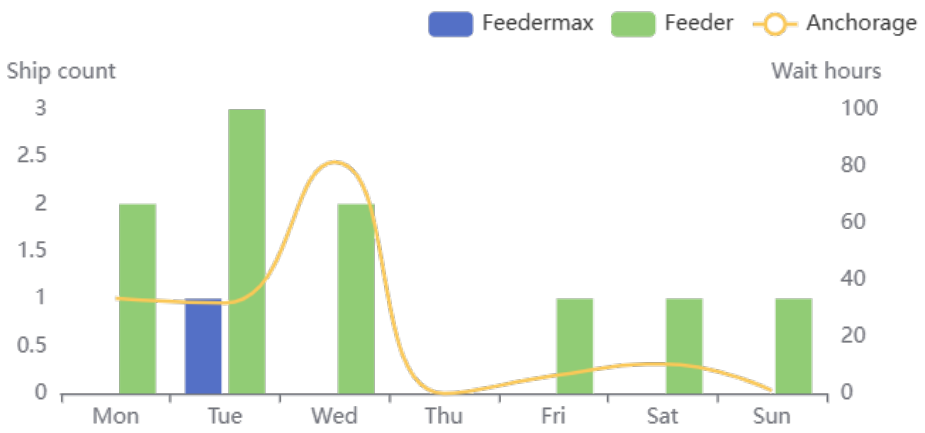
Type	M	T	W	Th	F	Sat	Sun
HDY	3	2	1	0	0	1	3
SMX	1	0	1	0	0	1	3
WT.h.	73.3	78.35	40.1	0.0	0.0	8.9	26.5



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

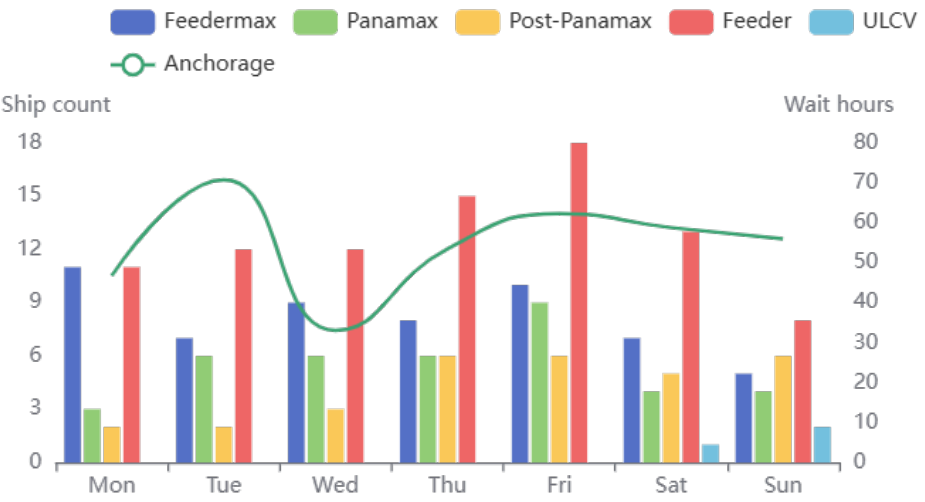
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	1	0	0	0	0	0
Pan.	0	0	0	0	0	0	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	2	3	2	0	1	1	1
WT.h.	33.45	31.9	81.45	0.0	6.2	10.4	1
Ulcw	0	0	0	0	0	0	0



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

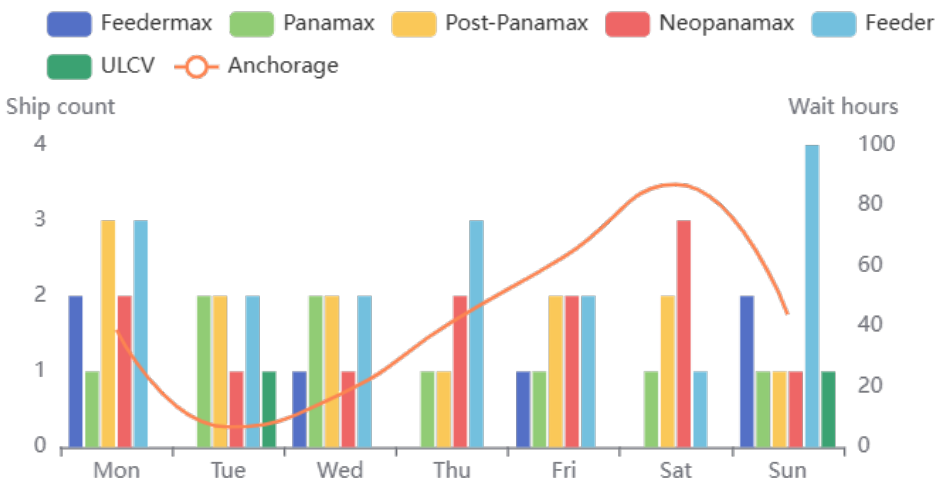
Type	M	T	W	Th	F	Sat	Sun
F.ma.	11	7	9	8	10	7	5
Pan.	3	6	6	6	9	4	4
PPx	2	2	3	6	6	5	6
NPx	0	0	0	0	0	0	0
Fd	11	12	12	15	18	13	8
Ulcw	0	0	0	0	0	1	2
WT.h.	46.8	70.8	33.05	53.5	62.3	58.8	56



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

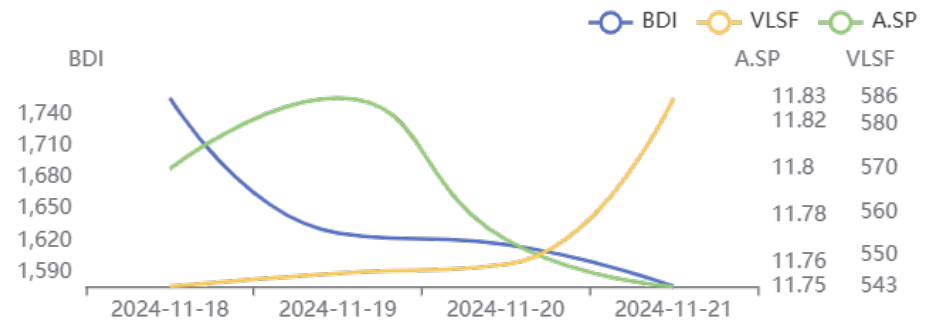
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	0	1	0	1	0	2
Pan.	1	2	2	1	1	1	1
PPx	3	2	2	1	2	2	1
NPx	2	1	1	2	2	3	1
Fd	3	2	2	3	2	1	4
Ulcw	0	1	0	0	0	0	1
WT.h.	38.8	6.65	17.5	41.5	63	87	44



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

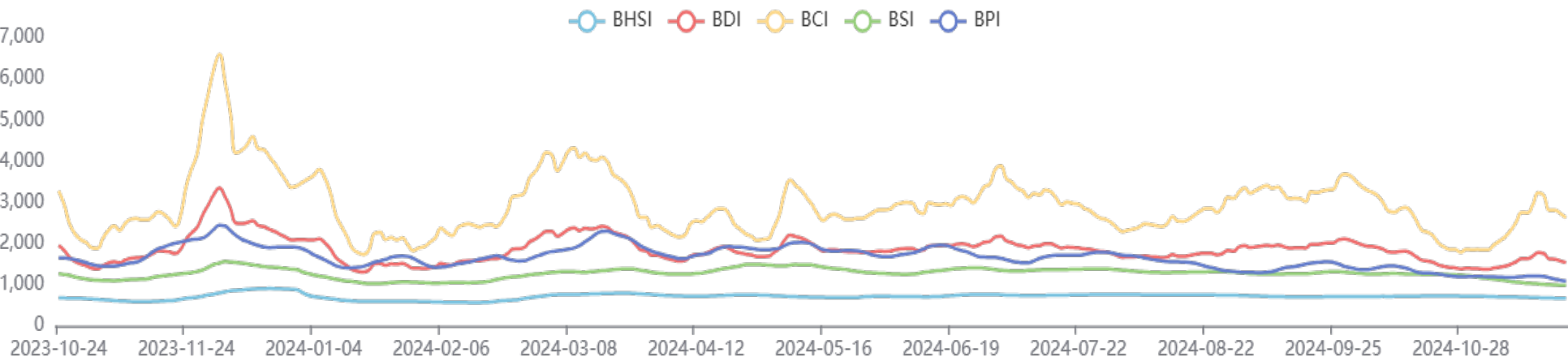
Type	M	T	W	Th	F	Sat	Sun
BDI	1009	999	992	987			
VLSF	543.00	546.00	548.00	586.00			
A.SP	11.8	11.83	11.77	11.75	11.71	11.71	



第三部分 航运市场 SHIPPING MARKET

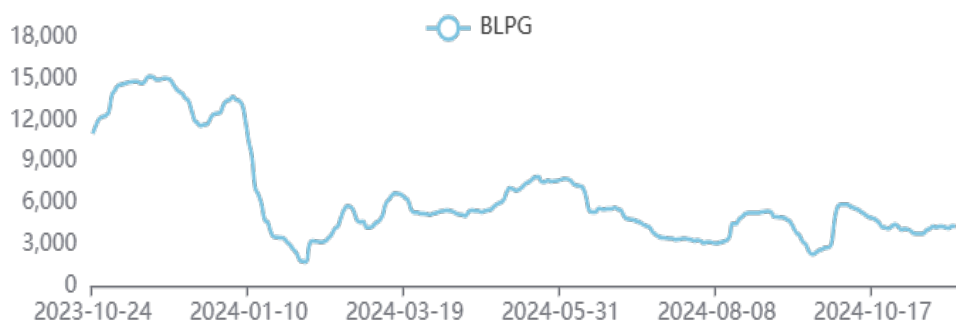
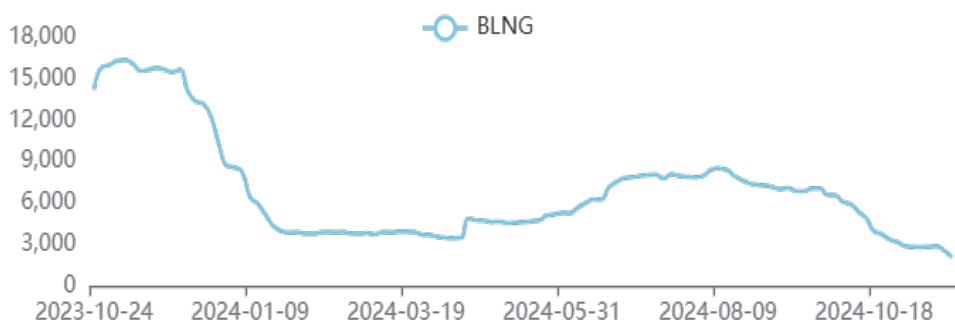
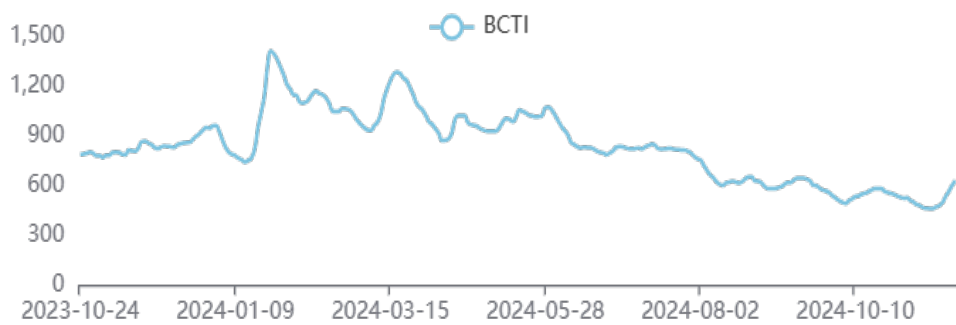
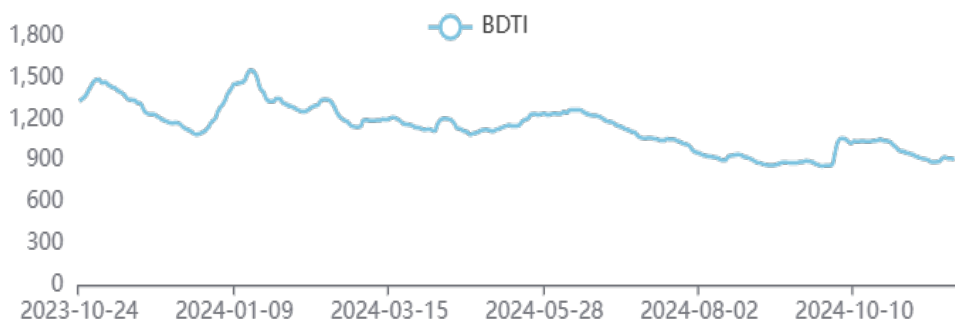
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1537	-248.0	-13.89	9.01	-12.42
BCI	2626	-603.0	-18.67	41.49	8.74
BPI	1083	-129.0	-10.64	-9.83	-46.07
BSI	984	-35.0	-3.43	-20.65	-21.09
BHSI	670	-15.0	-2.19	-7.97	7.54



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	908	18.0	2.02	-12.36	-26.77
BCTI	627	150.0	31.45	13.59	-26.75
BLNG	2067	-793.0	-27.73	-38.17	-86.79
BLPG	4302	5.0	0.12	-0.02	-71.15



第四部分 运力分布 SUPPLY DISTRIBUTION

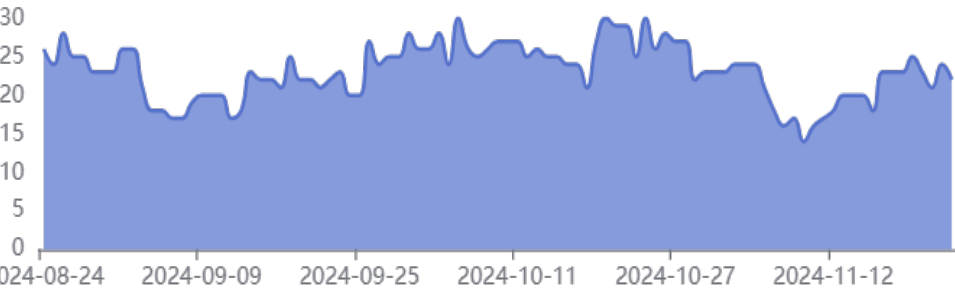


好望角型散货船 Capesize

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	23	25	23	21	24	22



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.

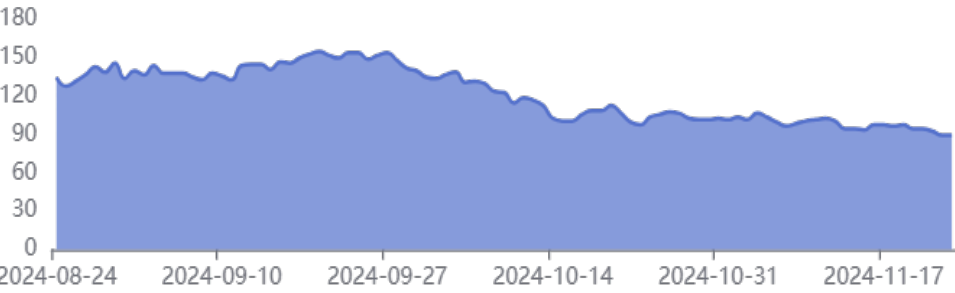
Type	M	T	W	Th	F	Sat	Sun
Cape	29	30	30	27	27	18	21

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.

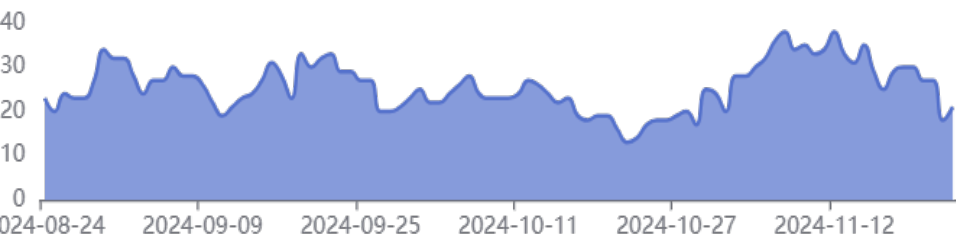
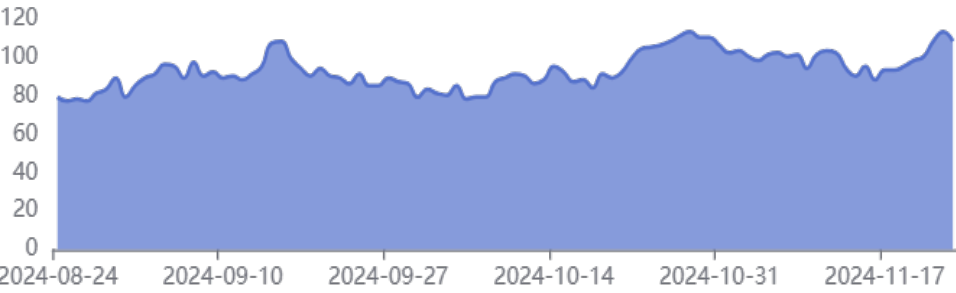
Type	M	T	W	Th	F	Sat	Sun
Pan.	96	97	94	94	92	89	89



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.

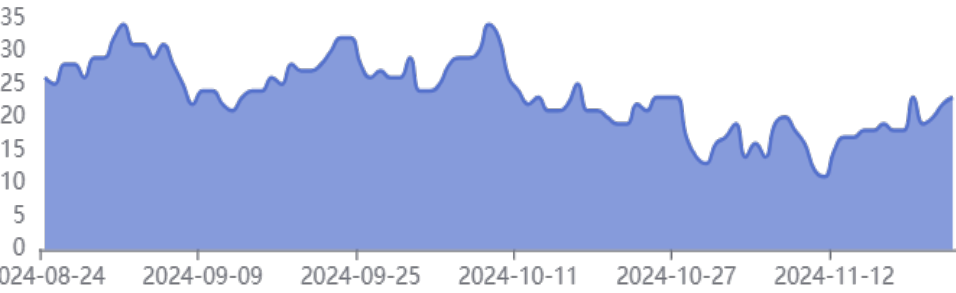
Type	M	T	W	Th	F	Sat	Sun
Cape	93	95	98	100	108	113	108



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.

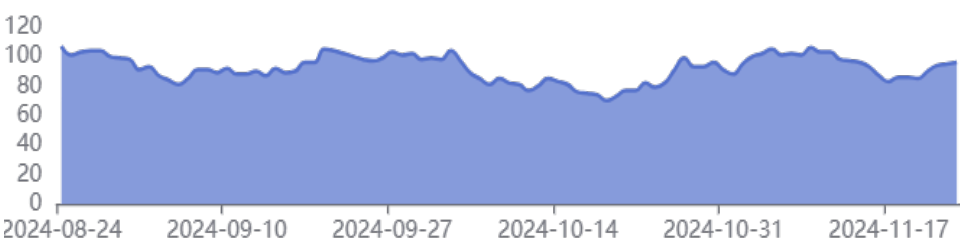
Type	M	T	W	Th	F	Sat	Sun
Pan.	15	12	15	14	12	14	17



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.	86	86	85	90	94	95	96

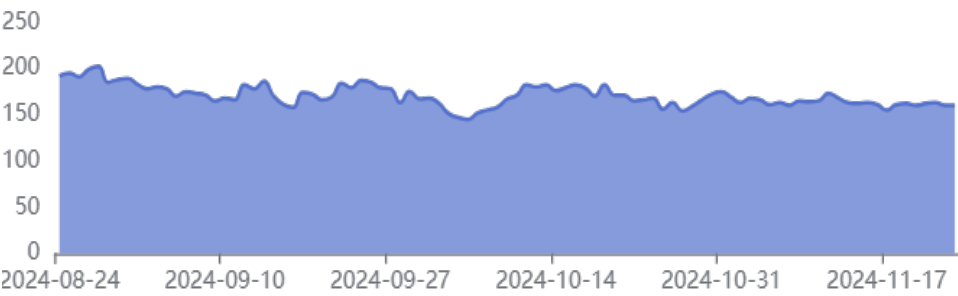


超大灵便型散货 SUPRAMAX

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.

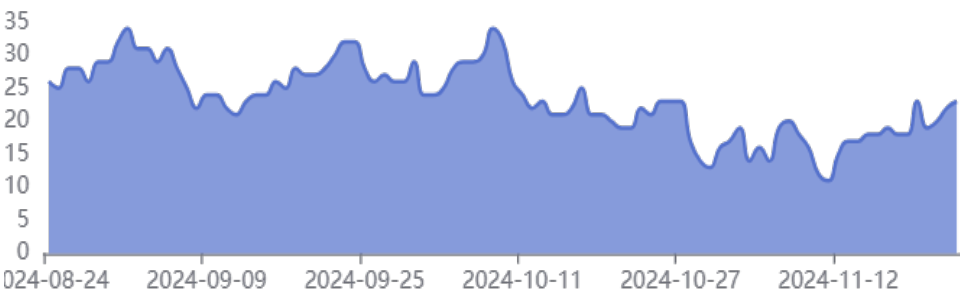
Type	M	T	W	Th	F	Sat	Sun
SMX	161	162	160	162	163	160	160



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.

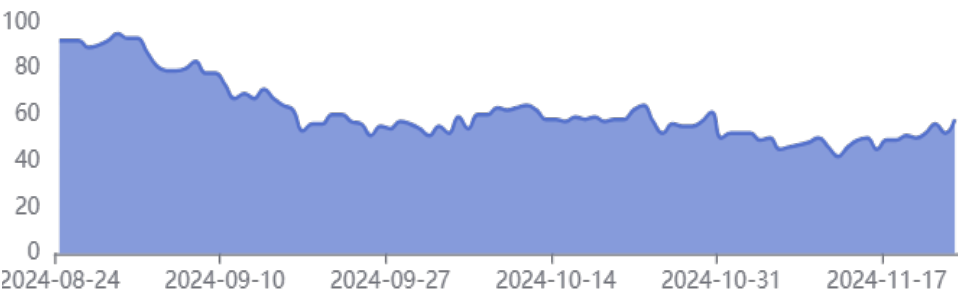
Type	M	T	W	Th	F	Sat	Sun
SMX	18	18	23	19	20	22	23



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.

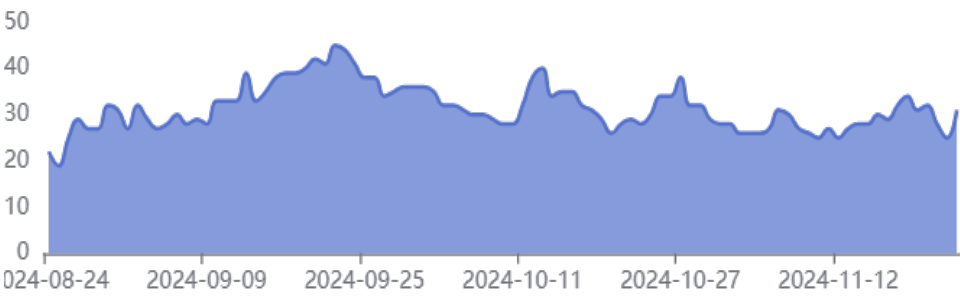
Type	M	T	W	Th	F	Sat	Sun
SMX	32	34	31	32	28	25	31



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.

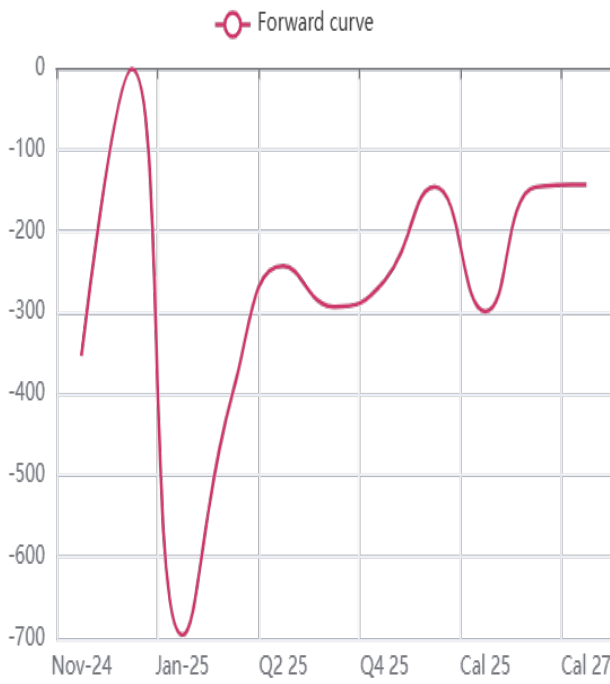
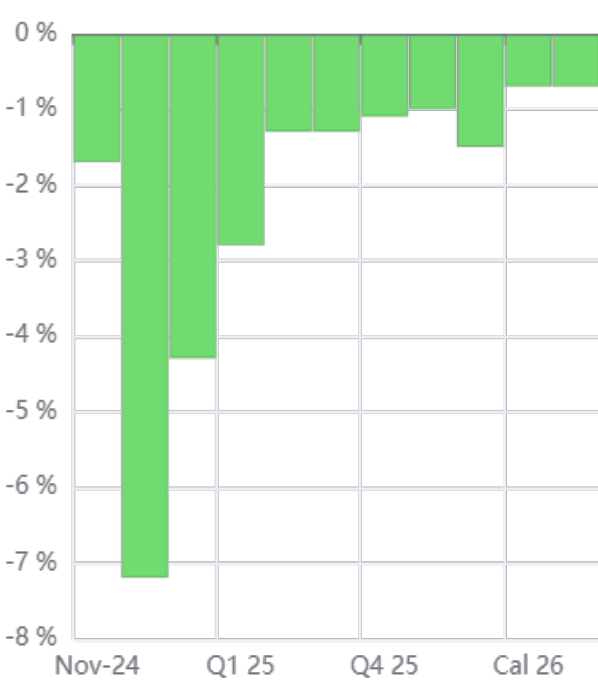
Type	M	T	W	Th	F	Sat	Sun
SMX	49	51	50	52	56	52	58



第五部分 远期运价协议 FFA

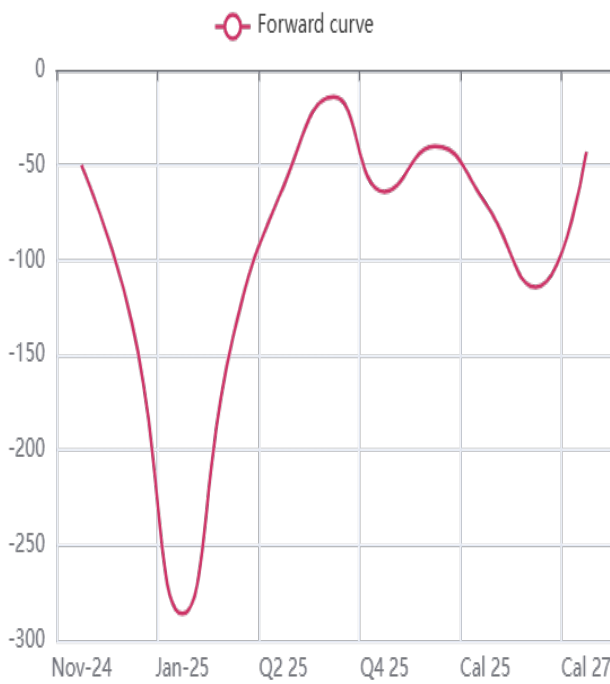
好望角型散货船Capesize

5TC	\$/day	WoW	
Nov-24	20,861.00	-353.0	-1.7 %
Dec-24	21,254.00	-1650.0	-7.2 %
Jan-25	15,629.00	-696.0	-4.3 %
Q1 25	13,645.33	-397.67	-2.8 %
Q2 25	18,564.33	-242.67	-1.3 %
Q3 25	22,725.00	-293.0	-1.3 %
Q4 25	23,243.00	-261.0	-1.1 %
Q1 26	13,829.00	-146.0	-1.0 %
Cal 25	19,544.42	-298.58	-1.5 %
Cal 26	19,618.00	-146.0	-0.7 %
Cal 27	19,636.00	-143.0	-0.7 %



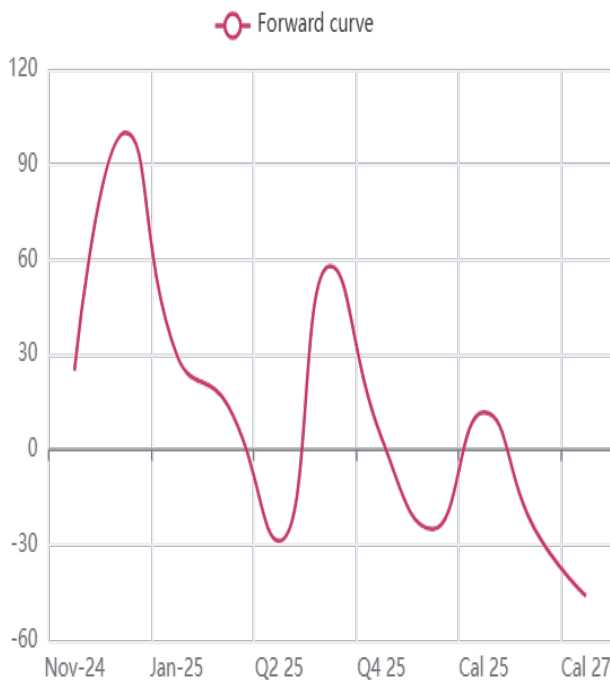
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Nov-24	9,025.00	-50.0	-0.6 %
Dec-24	8,771.00	-133.0	-1.5 %
Jan-25	7,957.00	-286.0	-3.5 %
Q1 25	8,881.00	-140.67	-1.6 %
Q2 25	11,400.00	-61.33	-0.5 %
Q3 25	11,425.00	-14.0	-0.1 %
Q4 25	11,229.00	-64.0	-0.6 %
Q1 26	10,039.00	-40.0	-0.4 %
Cal 25	10,733.75	-70.0	-0.6 %
Cal 26	10,654.00	-114.25	-1.1 %
Cal 27	10,875.00	-43.0	-0.4 %



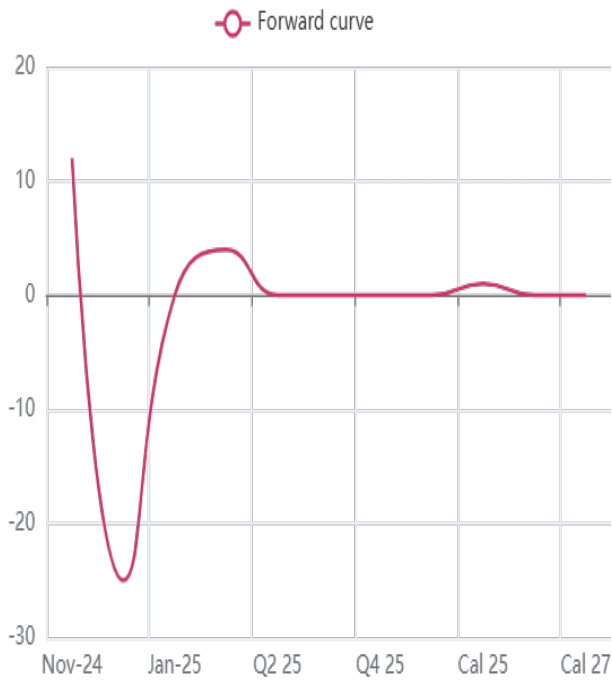
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Nov-24	11,083.00	25.0	0.2 %
Dec-24	10,658.00	100.0	0.9 %
Jan-25	9,313.00	30.0	0.3 %
Q1 25	9,673.67	14.0	0.1 %
Q2 25	11,738.00	-28.67	-0.2 %
Q3 25	11,696.00	58.0	0.5 %
Q4 25	11,517.00	4.0	0.0 %
Q1 26	11,033.00	-25.0	-0.2 %
11,156.17	Cal 25	11.83	0.1 %
Cal 26	11,033.00	-25.0	-0.2 %
Cal 27	11,133.00	-46.0	-0.4 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Nov-24	12,250.00	12.0	0.1 %
Dec-24	11,650.00	-25.0	-0.2 %
Jan-25	9,488.00	0.0	0.0 %
Q1 25	9,633.67	4.0	0.0 %
Q2 25	11,375.00	0.0	0.0 %
Q3 25	11,250.00	0.0	0.0 %
Q4 25	11,188.00	0.0	0.0
Q1 26	10,750.00	0.0	0.0 %
Cal 25	10,861.67	1.0	0.0 %
Cal 26	10,750.00	0.0	0.0 %
Cal 27	10,819.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	581.0	478.0	684.5	103.0	-7.0	-6.36	-11.21
Singapore	559.5	460.5	655.0	99.0	-7.5	-7.04	-9.59
Rotterdam	512.0	454.0	663.0	58.0	15.5	36.47	-1.69
Fujairah	543.5	449.0	661.0	94.5	-3.5	-3.57	41.04
Houston	557.5	444.5	746.0	113.0	-5.5	-4.64	-7.76

(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	197.0		-6.0	-2.96	-5.74	-11.66
Maize	222.0		-4.0	-1.77	1.37	-0.7
Soybeans	212.0		-6.0	-2.75	2.42	-18.98
Rice	213.0		-1.0	-0.47	-5.33	-12.04
Barley	211.0		-5.0	-2.31	-3.21	-4.82
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	69.23	1.27	1.87	-0.73	-9.52
Brent	USD/Bbl	73.34	1.69	2.36	-0.72	-9.08
Natural Gas	USD/MMBtu	2.95	0.01	0.34	26.07	-6.94
Gasoline	USD/Gal	2.02	0.06	3.06	1.0	-6.05
Heating Oil	USD/Gal	2.26	0.07	3.2	3.67	-16.61
Ethanol	USD/Gal	1.64	0.06	3.8	5.13	-11.83
Naphtha	USD/T	618.18	-9.54	-1.52	-4.33	-0.71
Propane	USD/Gal	0.79	-0.01	-1.25	9.72	25.4
Uranium	USD/Lbs	81.85	5.3	6.92	-0.91	11.13
Methanol	CNY/T	2515.0	48.0	1.95	5.89	2.24
TTF Gas	EUR/MWh	47.15	3.16	7.18	18.38	2.5
UK Gas	GBp/thm	118.36	7.38	6.65	18.59	2.56
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.12	-0.1	-2.37	-5.29	13.81
Coal	USD/T	141.75	-0.5	-0.35	-2.64	14.96
Steel	CNY/T	3288.0	50.0	1.54	1.61	-15.43
Iron Ore	USD/T	101.63	-2.19	-2.11	-3.42	-21.82
Aluminum	USD/T	2612.5	50.0	1.95	-0.85	17.84
Lithium	CNY/T	72500.0	0.0	0.0	1.4	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2619.28	-3.08	-0.12	-4.2	35.17
Silver	USD/t.oz	31.27	0.65	2.12	-8.51	41.94
Platium	null	963.6	6.9	0.72	-5.3	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.06		0.0	0.0	-1.85	-0.93
USD/CNY	7.24		0.0	0.0	1.54	-0.82

第八部分 本周话题 WEEKLY TOPIC



等不及战争结束

航运市场应该还记得2023年11月19日发生在红海的船舶劫持事件，该船系胡塞武装人员在红海劫持的第一艘悬挂巴哈马国旗的大型汽车船“GALAXY LEADER”，据hiFleet最新数据显示，该船依然停泊在卡马兰岛附近港湾锚地，时间一晃已整整一年，其船员还在经受着精神和身体的双重打击。

根据hiFleet船舶档案信息显示，这艘被劫持的汽车船系2002年波兰格丁尼亚船厂制造，船长182米，船宽32米，DNV船级社。去年11月19日该船被劫持时船上一共有25名船员，他们分别来自保加利亚、菲律宾、乌克兰、墨西哥和罗马尼亚的船员。该船被劫持的过程堪称警匪大片，胡塞武装使用了直升飞机直接登船并快速控制了该船。这些被劫持的船员短期几乎没有释放的希望，也没有迹象表明他们的命运在国际外交议程上占据重要地位。一年已经过去了，战争没有停歇，船员归家的渴望等不及战争的结束。在红海危机持续一周年之际，胡塞使用导弹两次袭击了一艘散货船，攻击前几分钟，相关船舶被警告改变航向。2024年11月18日，据HiFleet航运大数据和船舶档案信息显示，一艘新加坡管理的散货船在也门附近航行，该船在曼德海峡和亚丁湾航行时，两次与胡塞武装的导弹擦肩而过。根据数据显示，被袭击的船舶可能是一艘超大灵便日本造的散货船。国际间的政治对抗和区域的海盗行为始终威胁着海员自身

的安全和自由。某船的船长和二副因为停靠俄罗斯黑海占领区港口可能面临乌克兰当局5年的监狱生涯。运气不好的船员甚至因为通过风险海域被武装袭击或海盗劫持而失去了生命。历史还记得北京时间 2024 年3月6日凌晨，也门胡赛武装使用导弹袭击了美国橡树资本投资的散货船，直接导致三名船员死亡，另有三人伤势严重；也有船舶侥幸逃脱海盗的魔掌，2024年1月4号，距离索马里Eyl东南方向约455海里，一艘航行中的散货船在雷达上发现了海盗船。海盗手持机关枪和火箭筒向该船开火。船长随即发出了警报，启动了SSAS，所有船员进入了船舶安全堡垒。附近的印度军舰很快做出反应，立即派出直升机前往事发地点，并成功登船对海盗进行了扫荡。获得安全信息后，船员们从堡垒中出来，又重新控制了这艘船，该船恢复航线并庆幸所有船员都安全。海上除了风暴和海啸对船舶和船员安全造成威胁外，还有海盗和武装袭击带来的不幸，这些使得船员的安全和对航行的自由造成了极大的威胁，国际相关组织应联合多方面力量以采取有效举措最大程度的解决船员安全和航行自由。

The shipping should remember the hijacking of a ship in the Red Sea on November 19, 2023. The ship was the first large Bahamian-flagged car boat "GALAXY LEADER" hijacked by Houthis armed men in the Red Sea. According to the latest data from hiFleet, the ship is still anchored in the harbor anchorage near Kamalan Island. It's been a full year, and the crew is still suffering both mentally and physically.

According to hiFleet ship archives, the hijacked car ship was built in 2002 by the Polish shipyard Gdynia, with a length of 182 meters and a width of 32 meters, DNV classification society. There were 25 crew members from Bulgaria, the Philippines, Ukraine, Mexico and Romania on board when the ship was hijacked on November 19. The hijacking of the ship was a dramatic police operation. The Houthis used helicopters to board the ship directly and quickly took control of it. There is little hope of the hijacked sailors being released any time soon, and no sign that their fate is high on the international diplomatic agenda. A year has passed, the war has not stopped, and the crew's desire to go home cannot wait until the war is over. On the first anniversary of the crisis in the Red Sea, the Houthis used missiles to attack a bulk carrier twice, minutes after the vessels were warned to change course. On November 18, 2024, according to HiFleet shipping big data and ship archive information, a Singapore-managed bulk carrier sailing near Yemen, the ship was sailing in the Bab el-Mandeh Strait and the Gulf of Aden when it twice passed Houthi missiles. According to the data, the ship that was attacked may have been an oversized, handy-sized Japanese-made bulk carrier. International political rivalries and regional piracy always threaten the safety and freedom of seafarers themselves. The captain and second officer of a ship could face up to five years in prison by Ukrainian authorities for calling at a port in Russia's occupied Black Sea territory. Unlucky crew members have even lost their lives as a result of armed attacks or hijacking by pirates through risky waters.

History also remembers that in the early morning of March 6, 2024, Beijing time, Yemen's Houthi armed forces used missiles to attack the bulk carrier invested by the United States Oaktree Capital, directly resulting in the death of three crew members and serious injuries to three others;

On January 4, 2024, about 455 nautical miles southeast of Eyl, Somalia, a bulk carrier in transit picked up the pirate ship on radar. Pirates armed with machine guns and rocket launchers opened fire on the ship. The captain then sounded the alarm, activated the SSAS, and all the crew entered the ship's safety fort. Nearby Indian warships quickly responded, immediately sent a helicopter to the site, and successfully boarded the ship to sweep up the pirates. After receiving safety information, the crew emerged from the fort and regained control of the ship, which resumed its course and was grateful that all crew members were safe.

In addition to the threats posed by storms and tsunamis to the safety of ships and sailors, there are also disasters caused by piracy and armed attacks, which pose a great threat to the safety of seafarers and the freedom of navigation. Relevant international organizations should take effective measures to solve the problem of the safety of seafarers and the freedom of navigation to the greatest extent by combining various forces.