



2024年 第48周市场周报

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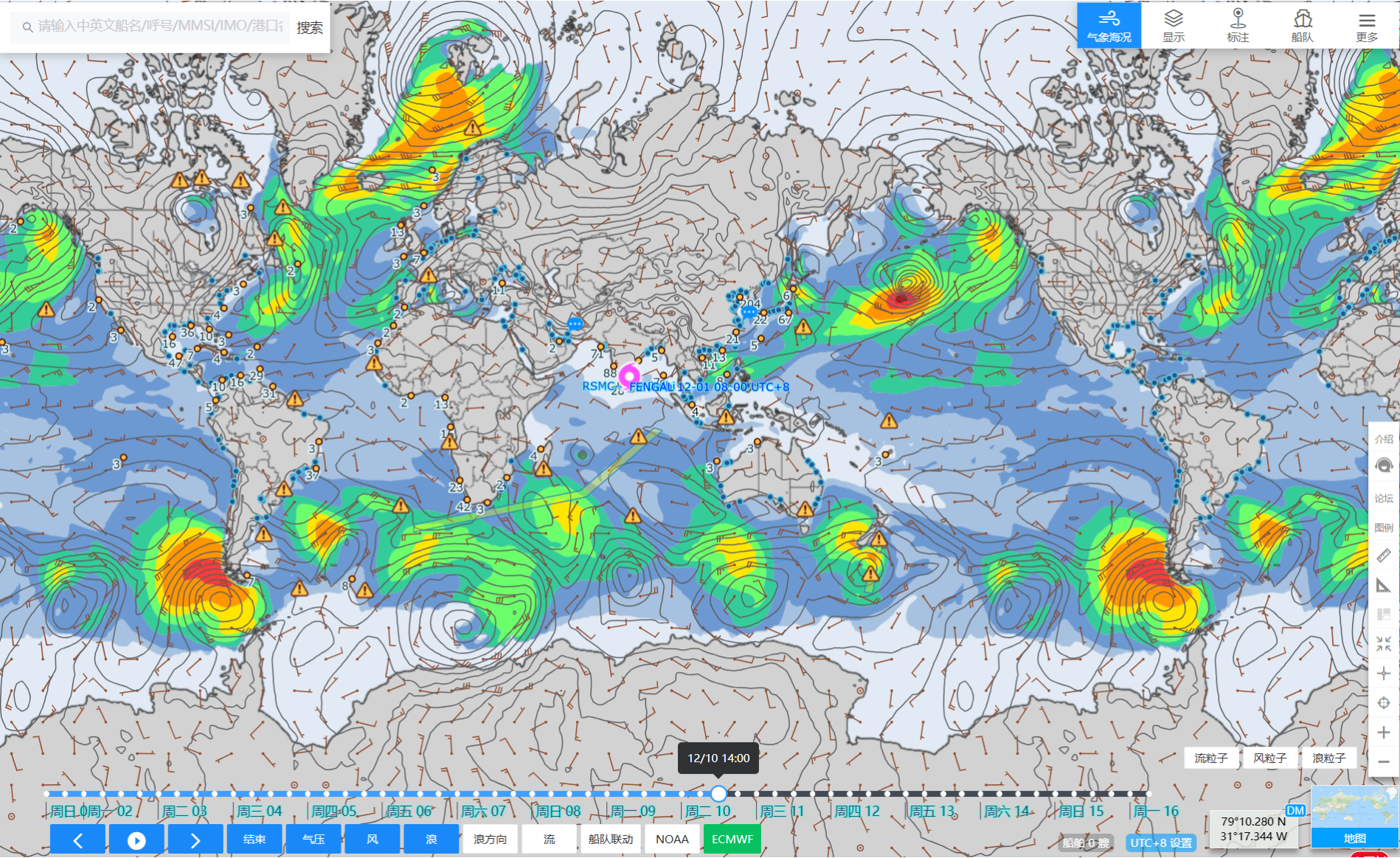
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最新商品价格 LATEST COMMODITIES PRICE

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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1070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 1070 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4-7级，后半周会经历大浪；黄海风力4-7级，后半周会经历巨浪；东海风力4-7级，后半周会经历巨浪；台湾海峡4-7级风，台湾海峡后半周将经历大浪；南海大部海域风力5-6级，相关海域有大浪。The coming week the wind in Bohai Sea will become strong in the later week with rough sea. Yellow Sea will become strong with very rough sea. And China East Sea will become strong as well with very rough wave. The wind in the Taiwan Strait will become strong with rough wave in the late half of the week. In most of the South China Sea the wind will be strong with rough sea.

海盗事件 Piracy

11月19日，新加坡海峡四名手持长刀的劫匪登上了一艘正在航行的散货船，并进入了机舱。他们把值班机工绑起来，警告保持安静后逃走了。机工跑到集控室通知了值班二管轮并发出警报。机舱组人员进行了搜索，没有发现任何丢失的东西。该事件已报告给VTIS中心。海岸警卫队在新加坡锚地登船，确保船员安全。19.11.2024: 2110 UTC: Posn: 01:04.6N – 103:41.6E, Singapore Straits. Four robbers armed with long knives boarded a bulk carrier underway and entered the engine room. They tied up the duty motorman and fled after warning him to stay quiet. The motorman ran to the ECR and informed the 2/E who raised the alarm. Crew conducted a search and found nothing missing. The incident was reported to VTIS Central. Coast guard boarded the ship at Singapore anchorage to ensure crew safety.

海上事件 Marine Incidents

11月25日晚间，在北海一艘补给船碰撞了一个钻井平台，11月26日，为防止意外事故，52名非必要工作人员从钻井平台撤离。On the evening of November 25, a supply ship collided with a drilling platform in the North Sea, and on November 26, 52 non-essential staff were evacuated from the rig as a precaution.

其它 Others

没有 Nil

备注 Remark

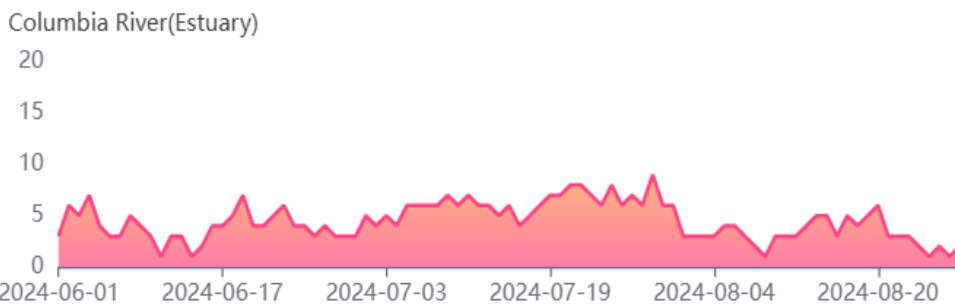
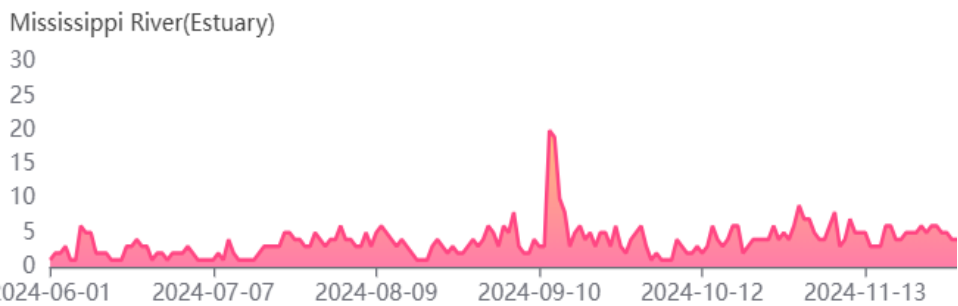
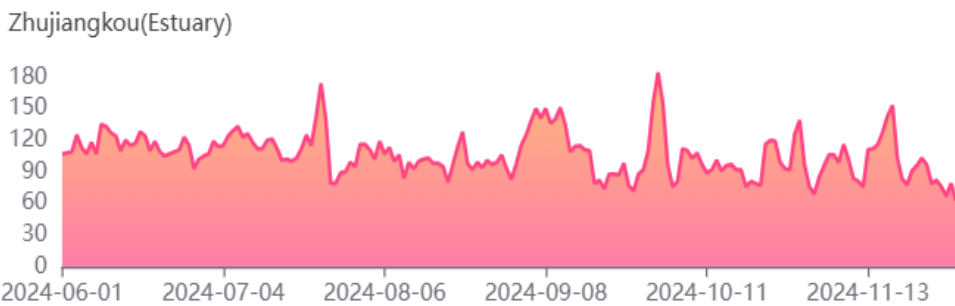
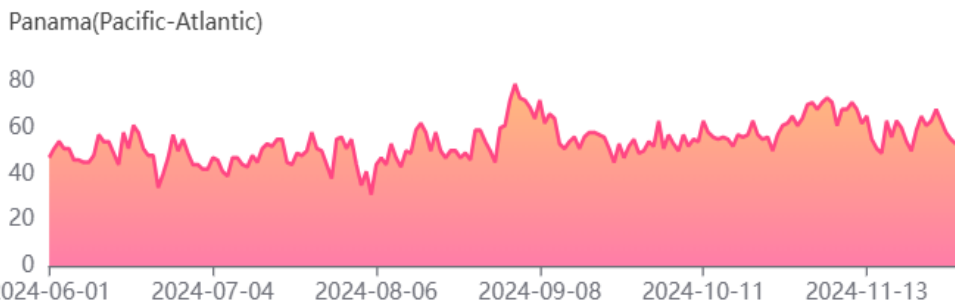
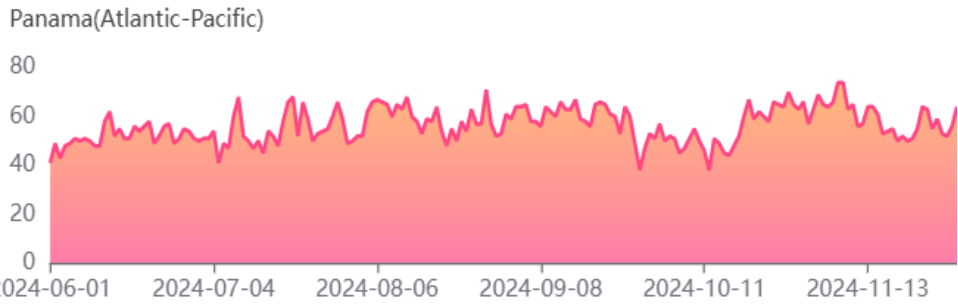
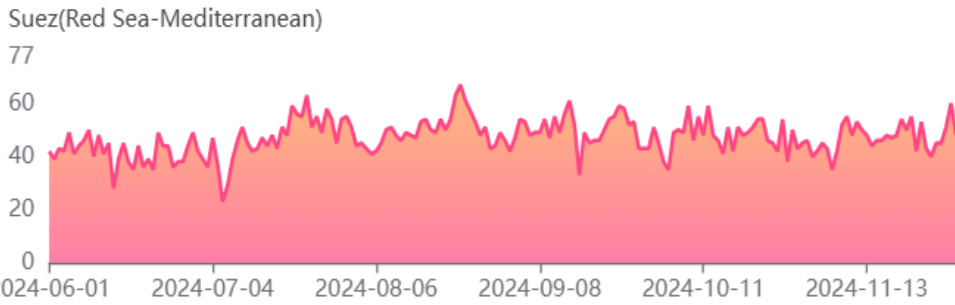
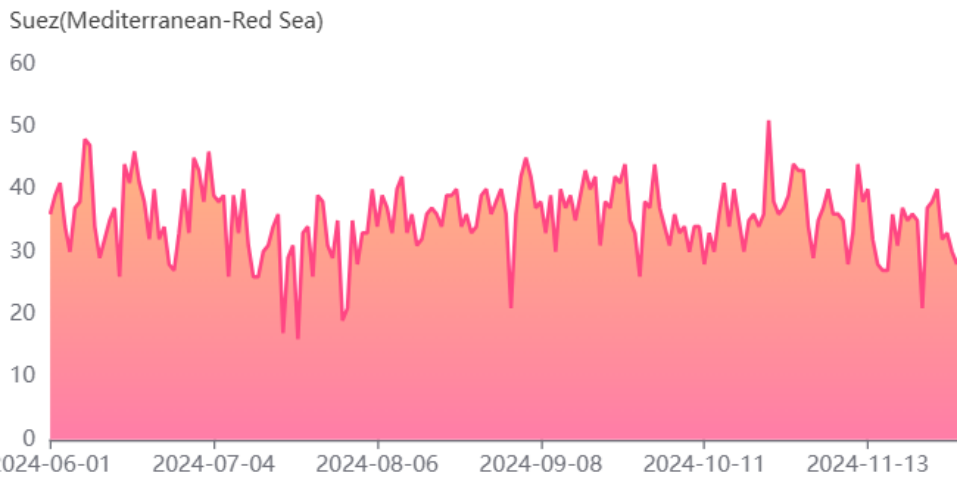
本报告数据截止时间为2024年12月1日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Dec 1st of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	48	1378	-12	-14
Miss.Riv.	4	141	0	18
CJK	164	4971	-116	737
Pa.Atlan.	64	1728	35	93
Colum.Riv.	6	192	-9	51
Suez.Med.	28	985	1	-57
Pa.Pac.	53	1792	16	99
ZJK	62	2810	-205	-13

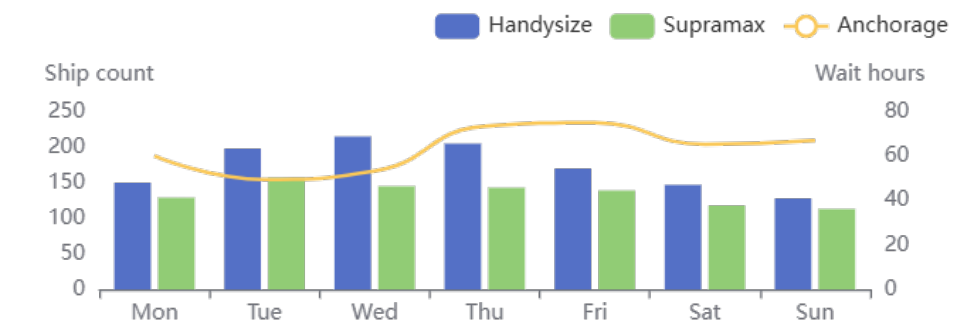


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

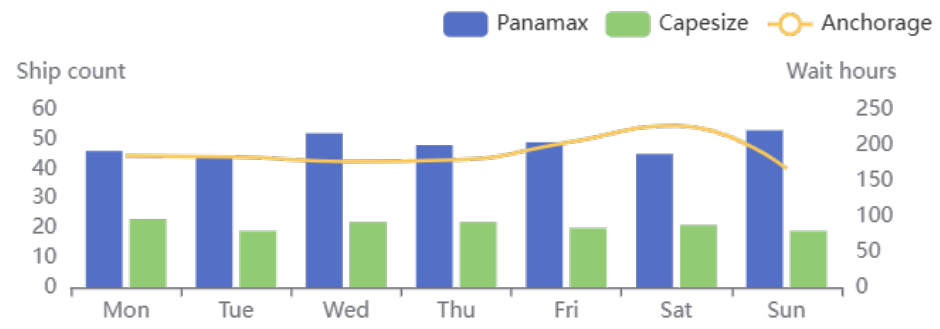
Type	M	T	W	Th	F	Sat	Sun
HDY	150	198	215	205	170	147	128
SMX	129	157	145	143	139	118	113
WT.h.	60.1	49.5	53.3	73.5	75	65.3	67



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

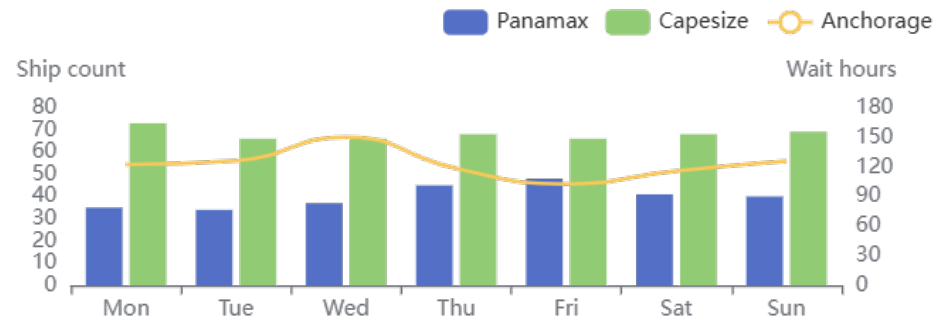
Type	M	T	W	Th	F	Sat	Sun
Pan.	46	44	52	48	49	45	53
Cap	23	19	22	22	20	21	19
WT.h.	185.1	183.6	177	179.4	203.4	227.4	167



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

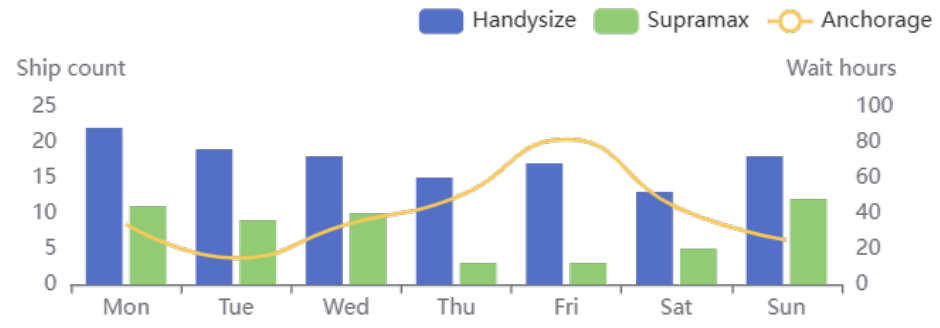
Type	M	T	W	Th	F	Sat	Sun
Pan.	35	34	37	45	48	41	40
Cap	73	66	66	68	66	68	69
WT.h.	122.35	126.3	150.3	118.4	102.75	116	126



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

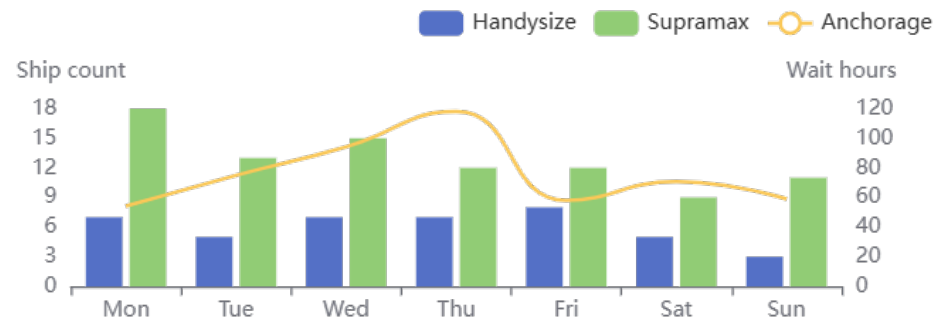
Type	M	T	W	Th	F	Sat	Sun
HDY	22	19	18	15	17	13	18
SMX	11	9	10	3	3	5	12
WT.h.	34	14.8	33.7	49.0	81.7	43.4	25



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

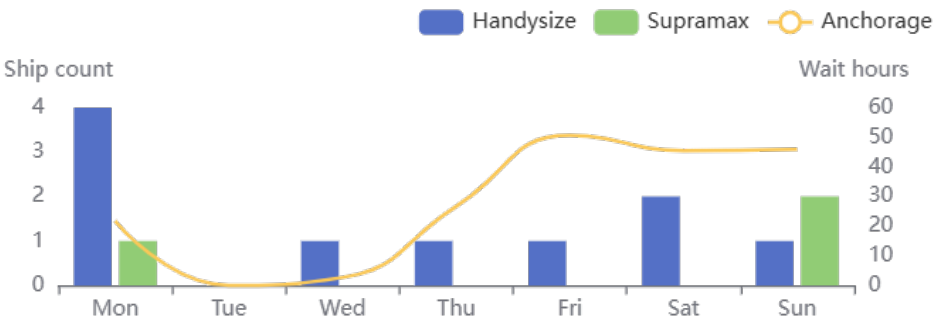
Type	M	T	W	Th	F	Sat	Sun
HDY	7	5	7	7	8	5	3
SMX	18	13	15	12	12	9	11
WT.h.	54.2	75	94.2	118.2	58.05	70.8	59



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

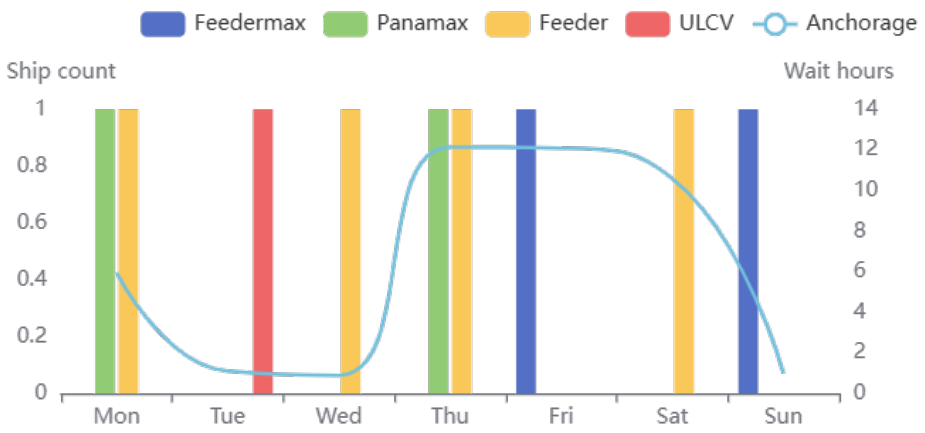
Type	M	T	W	Th	F	Sat	Sun
HDY	4	0	1	1	1	2	1
SMX	1	0	0	0	0	0	2
WT.h.	21.7	0.0	2.7	26.7	50.7	45.5	46



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

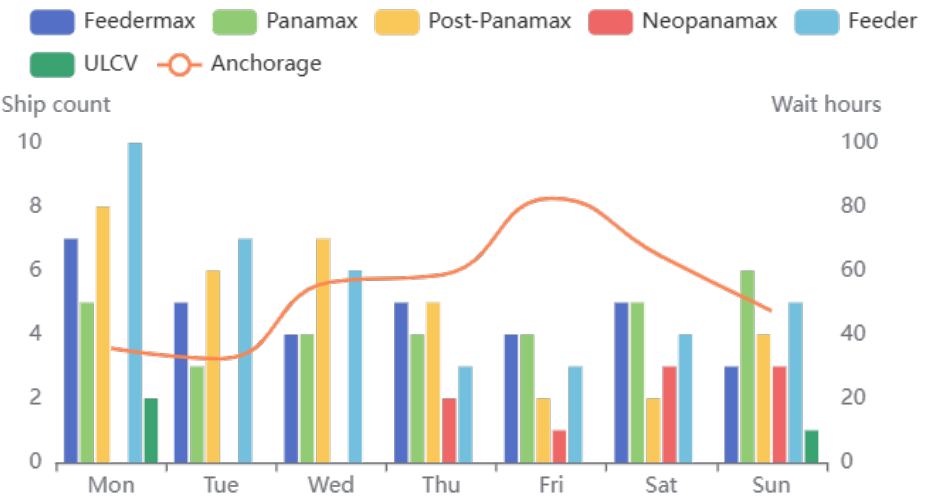
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	1	0	1
Pan.	1	0	0	1	0	0	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	1	0	1	1	0	1	0
WT.h.	5.95	1.1	0.9	12.15	12.1	10.6	1
Ulcw	0	1	0	0	0	0	0



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

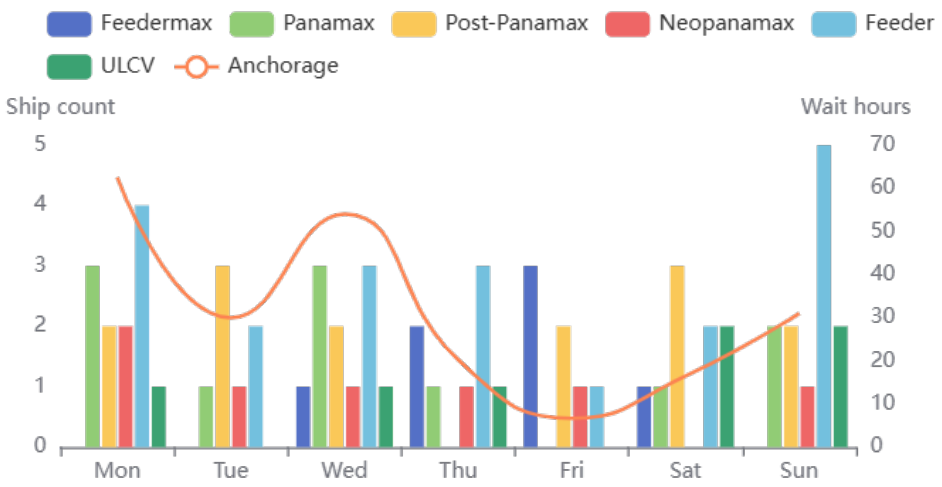
Type	M	T	W	Th	F	Sat	Sun
F.ma.	7	5	4	5	4	5	3
Pan.	5	3	4	4	4	5	6
PPx	8	6	7	5	2	2	4
NPx	0	0	0	2	1	3	3
Fd	10	7	6	3	3	4	5
Ulcw	2	0	0	0	0	0	1
WT.h.	35.8	32.5	56.5	58.7	82.7	64.5	47.5



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

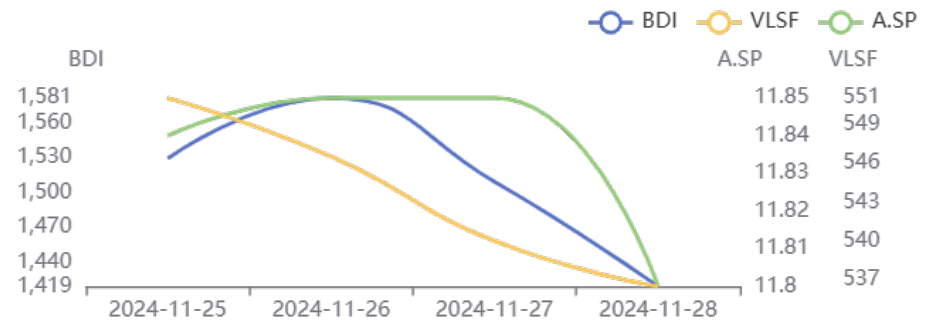
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	1	2	3	1	0
Pan.	3	1	3	1	0	1	2
PPx	2	3	2	0	2	3	2
NPx	2	1	1	1	1	0	1
Fd	4	2	3	3	1	2	5
Ulcw	1	0	1	1	0	2	2
WT.h.	62.5	30	54	20.25	6.7	16.5	31



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

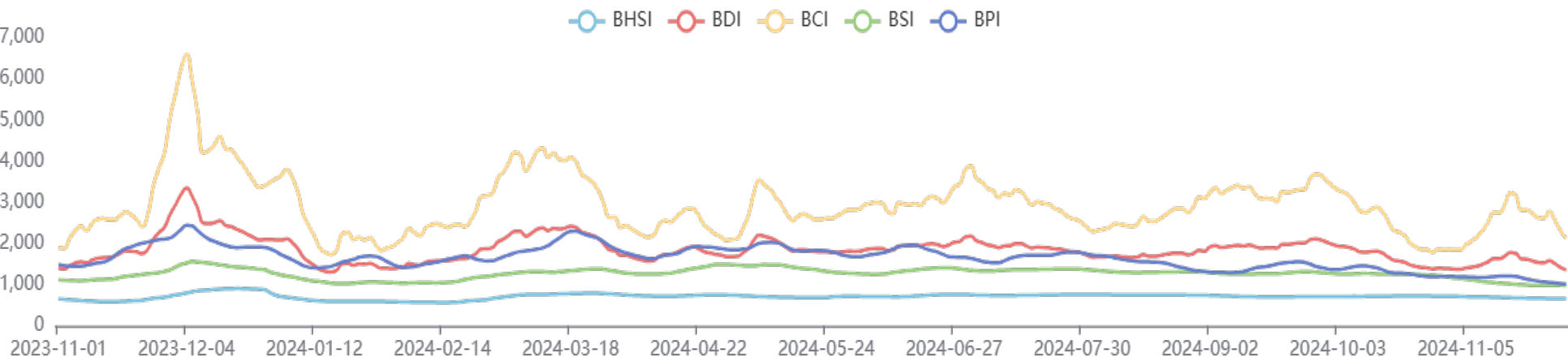
Type	M	T	W	Th	F	Sat	Sun
BDI	984	985	988	989			
VLSF	551.00	546.50	540.00	536.50			
A.SP	11.84	11.85	11.85	11.8	11.9	12.04	



第三部分 航运市场 SHIPPING MARKET

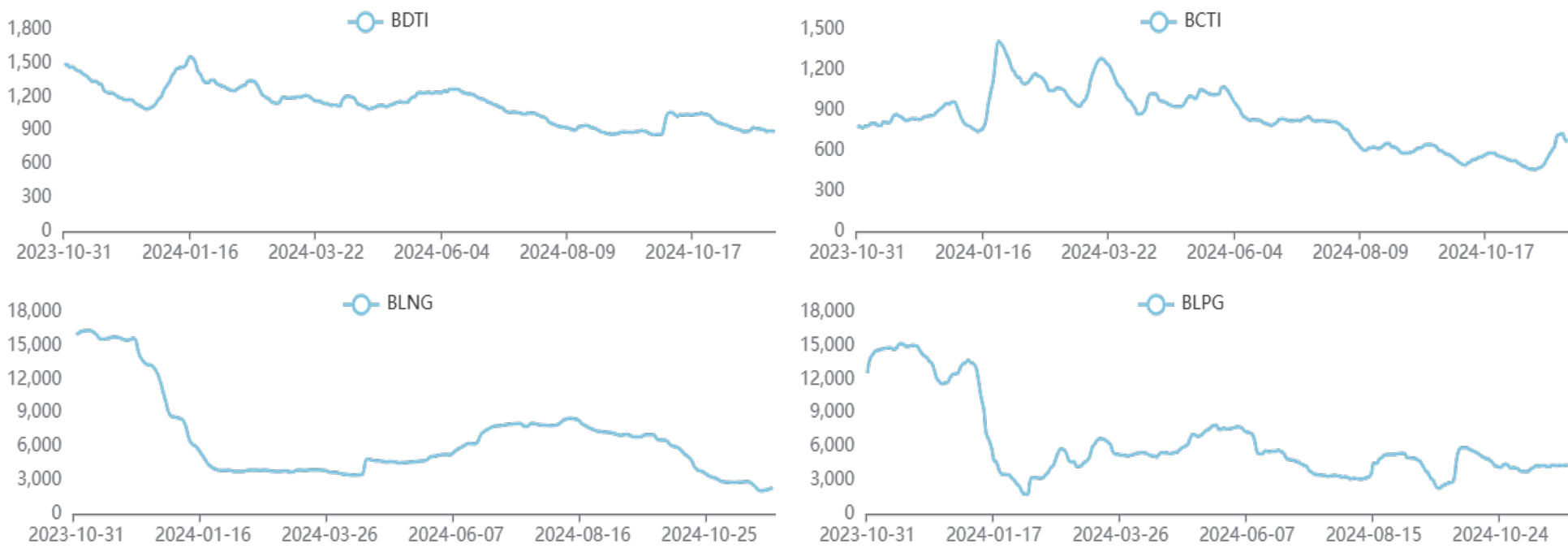
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1354	-183.0	-11.91	-1.74	-49.78
BCI	2133	-493.0	-18.77	15.42	-57.68
BPI	1018	-65.0	-6.0	-15.1	-52.23
BSI	980	-4.0	-0.41	-15.74	-27.94
BHSI	659	-11.0	-1.64	-8.22	-8.85



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	892	-16.0	-1.76	-6.79	-25.17
BCTI	663	36.0	5.74	26.53	-20.88
BLNG	2347	280.0	13.55	-18.17	-85.01
BLPG	4367	65.0	1.51	7.01	-69.51



第四部分 运力分布 SUPPLY DISTRIBUTION

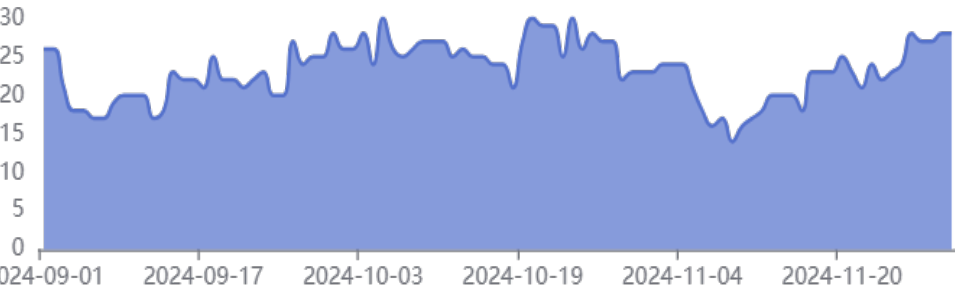


好望角型散货船 Capesize

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	23	24	28	27	27	28	28



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.

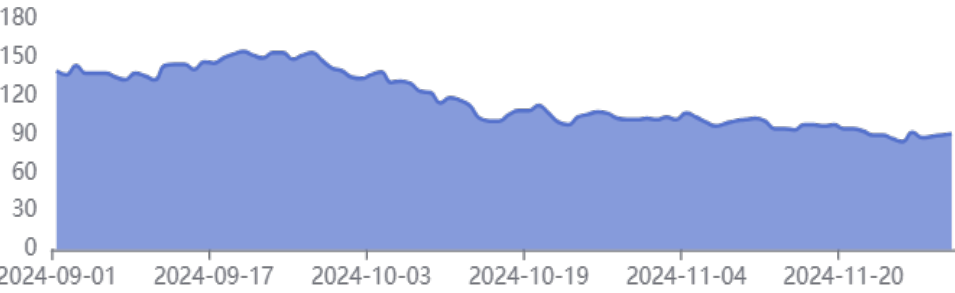
Type	M	T	W	Th	F	Sat	Sun
Cape	24	26	25	28	21	24	17

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.

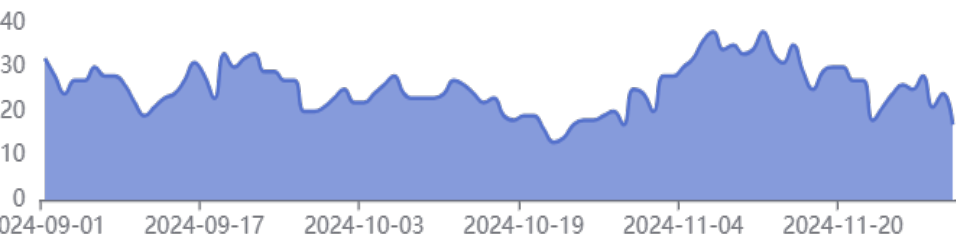
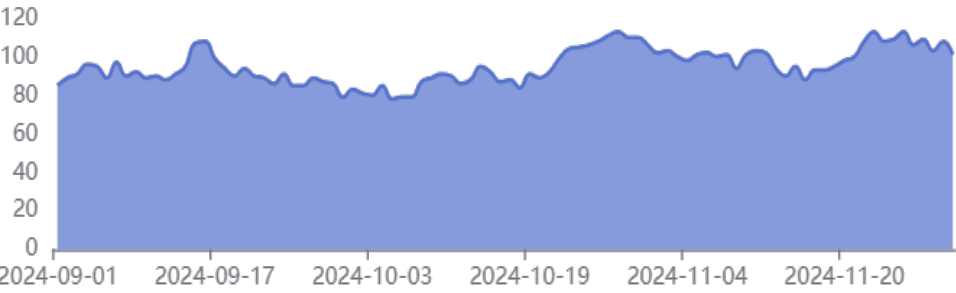
Type	M	T	W	Th	F	Sat	Sun
Pan.	86	84	91	87	88	89	90



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.

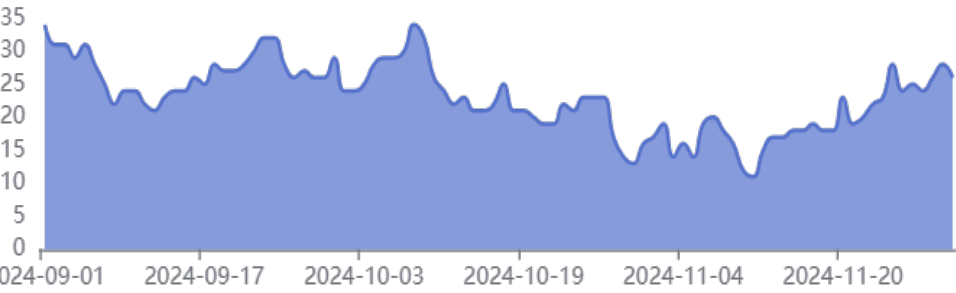
Type	M	T	W	Th	F	Sat	Sun
Cape	109	113	106	109	103	108	101



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.

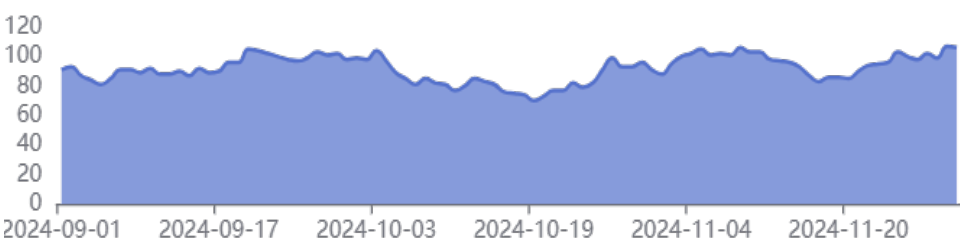
Type	M	T	W	Th	F	Sat	Sun
Pan.	19	22	19	21	20	18	18



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	100	98	102	99	107	106

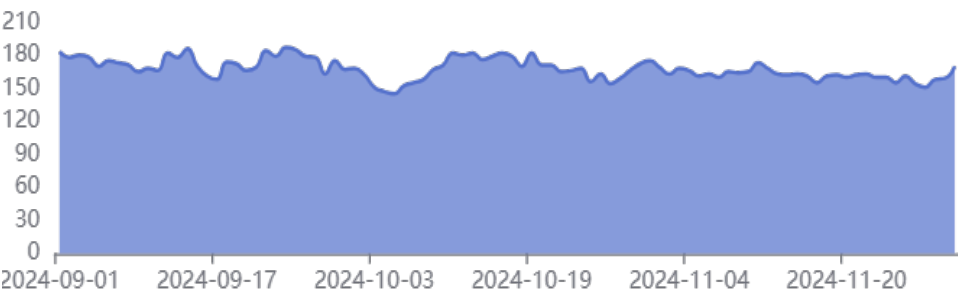


超大灵便型散货 SUPRAMAX

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.

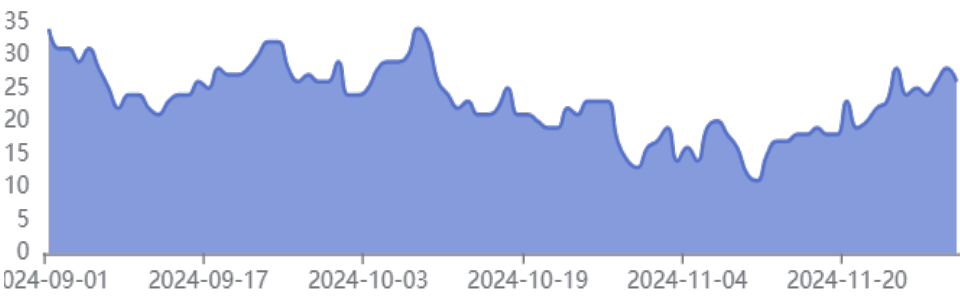
Type	M	T	W	Th	F	Sat	Sun
SMX	155	161	154	151	158	159	170



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.

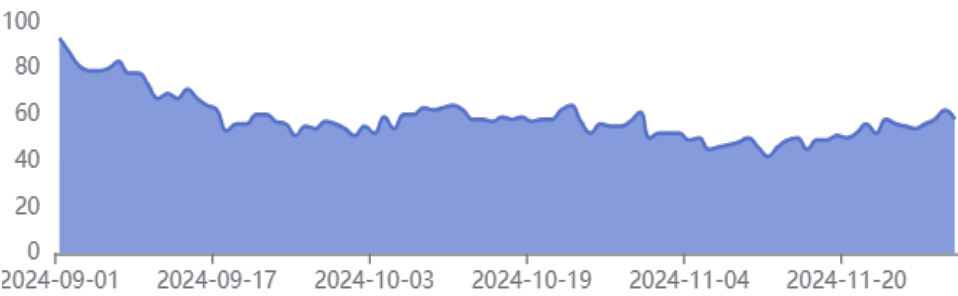
Type	M	T	W	Th	F	Sat	Sun
SMX	28	24	25	24	26	28	26



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.

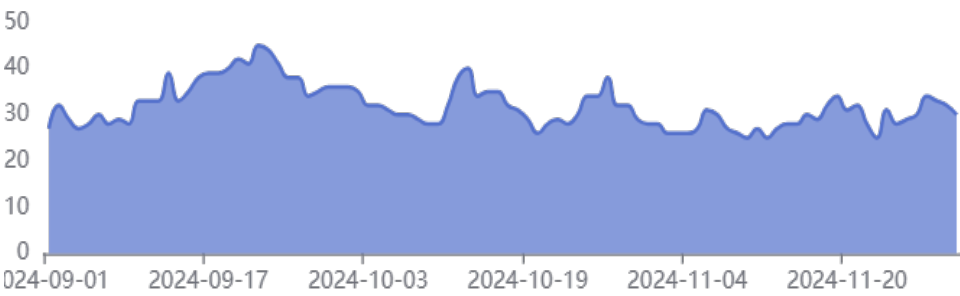
Type	M	T	W	Th	F	Sat	Sun
SMX	28	29	30	34	33	32	30



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.

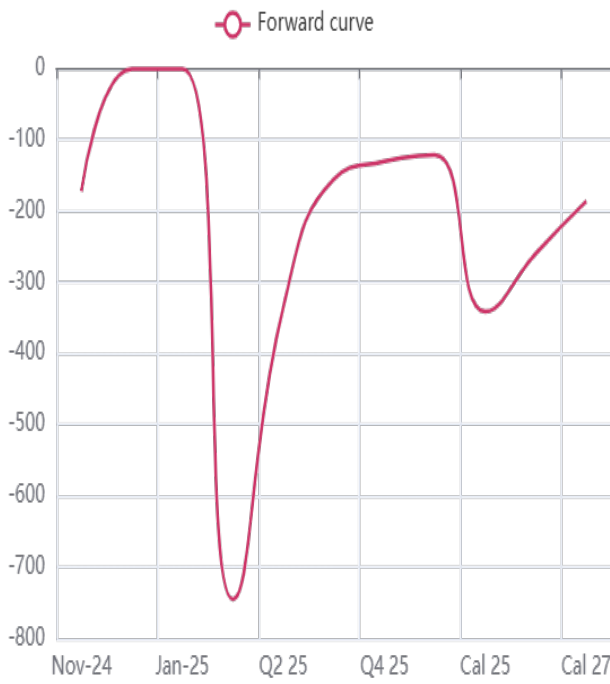
Type	M	T	W	Th	F	Sat	Sun
SMX	56	55	54	56	58	62	58



第五部分 远期运价协议 FFA

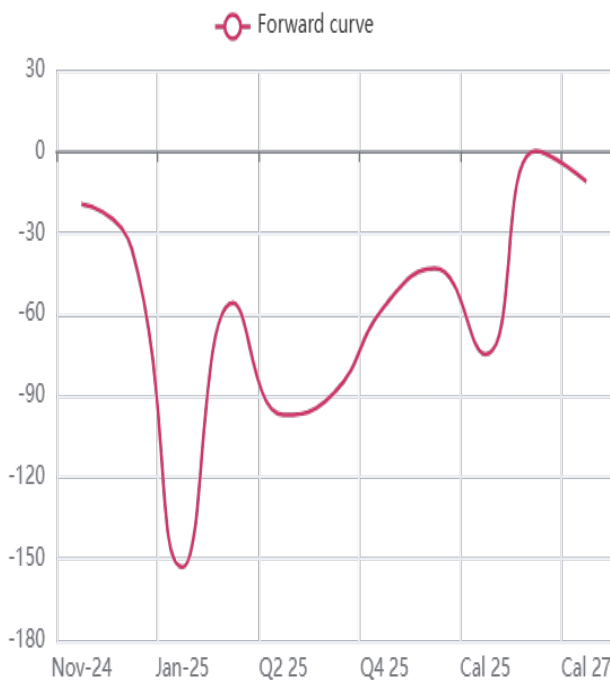
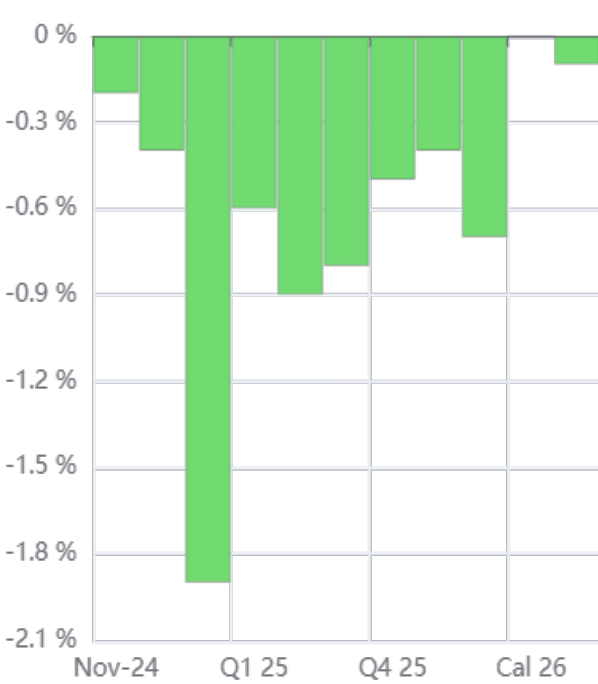
好望角型散货船Capesize

5TC	\$/day	WoW	
Nov-24	20,898.70	-172.3	-0.8 %
Dec-24	17,232.00	-1597.0	-8.5 %
Jan-25	12,364.00	-1503.0	-10.8 %
Q1 25	11,952.33	-745.0	-5.9 %
Q2 25	17,032.00	-334.67	-1.9 %
Q3 25	21,836.00	-156.0	-0.7 %
Q4 25	22,586.00	-131.0	-0.6 %
Q1 26	13,286.00	-122.0	-0.9 %
Cal 25	18,351.58	-341.67	-1.8 %
Cal 26	18,611.25	-260.0	-1.4 %
Cal 27	18,921.00	-187.0	-1.0 %



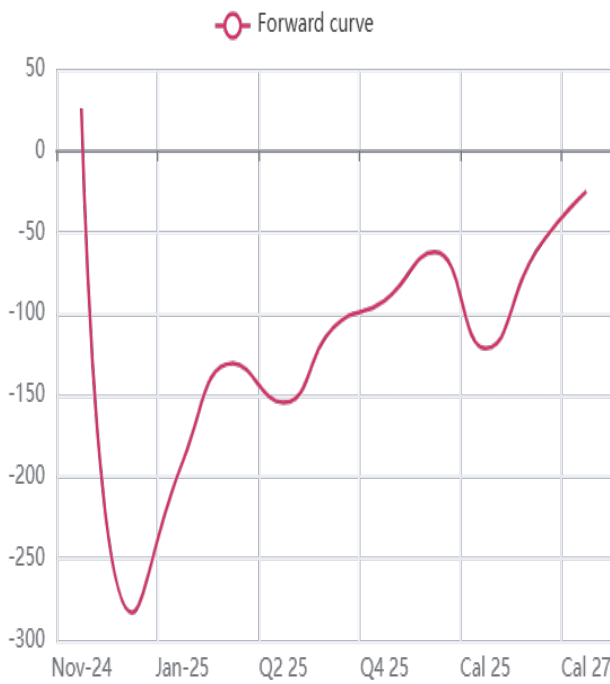
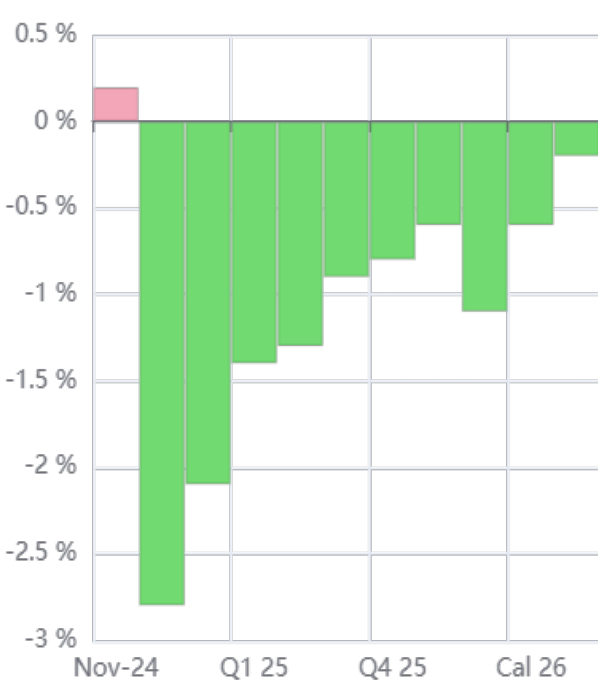
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Nov-24	8,969.70	-19.3	-0.2 %
Dec-24	8,146.00	-36.0	-0.4 %
Jan-25	7,818.00	-153.0	-1.9 %
Q1 25	8,850.00	-55.67	-0.6 %
Q2 25	11,171.00	-97.0	-0.9 %
Q3 25	11,204.00	-89.0	-0.8 %
Q4 25	11,050.00	-57.0	-0.5 %
Q1 26	10,021.00	-43.0	-0.4 %
Cal 25	10,568.75	-74.67	-0.7 %
Cal 26	10,454.00	0.25	0.0 %
Cal 27	10,718.00	-11.0	-0.1 %



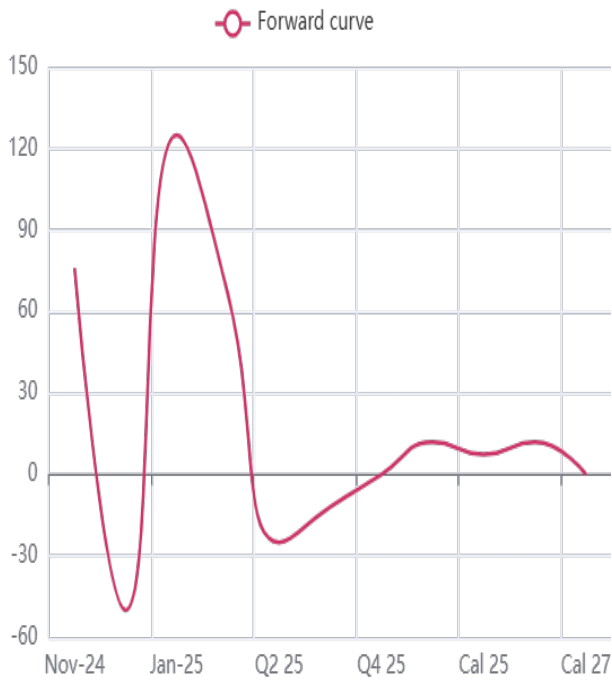
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Nov-24	11,114.00	26.0	0.2 %
Dec-24	9,925.00	-283.0	-2.8 %
Jan-25	8,842.00	-191.0	-2.1 %
Q1 25	9,322.33	-130.33	-1.4 %
Q2 25	11,288.00	-154.33	-1.3 %
Q3 25	11,442.00	-108.0	-0.9 %
Q4 25	11,200.00	-92.0	-0.8 %
Q1 26	10,717.00	-62.0	-0.6 %
10,813.08	Cal 25	-121.17	-1.1 %
Cal 26	10,717.00	-62.0	-0.6 %
Cal 27	11,075.00	-25.0	-0.2 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Nov-24	12,351.00	76.0	0.6 %
Dec-24	11,400.00	-50.0	-0.4 %
Jan-25	9,488.00	125.0	1.3 %
Q1 25	9,696.00	66.33	0.7 %
Q2 25	11,188.00	-25.0	-0.2 %
Q3 25	11,088.00	-12.0	-0.1 %
Q4 25	10,938.00	0.0	0.0
Q1 26	10,400.00	12.0	0.1 %
Cal 25	10,727.50	7.33	0.1 %
Cal 26	10,400.00	12.0	0.1 %
Cal 27	10,675.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	587.5	494.5	706.0	93.0	-10.0	-9.71	-17.33
Singapore	570.0	469.0	683.0	101.0	2.0	2.02	-0.98
Rotterdam	515.5	450.0	685.0	65.5	7.5	12.93	184.78
Fujairah	555.0	451.0	678.0	104.0	9.5	10.05	87.39
Houston	563.0	462.0	754.5	101.0	-12.0	-10.62	-12.17

(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	202.0		5.0	2.54	-1.46	-7.91
Maize	222.0		0.0	0.0	-0.89	-1.59
Soybeans	209.0		-3.0	-1.42	-1.88	-20.07
Rice	213.0		0.0	0.0	-1.84	-12.92
Barley	216.0		5.0	2.37	0.47	-1.61
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	68.66	-0.57	-0.82	1.61	-10.78
Brent	USD/Bbl	72.73	-0.61	-0.83	1.48	-10.73
Natural Gas	USD/MMBtu	3.41	0.46	15.59	20.07	17.59
Gasoline	USD/Gal	1.99	-0.03	-1.49	1.02	-9.55
Heating Oil	USD/Gal	2.23	-0.03	-1.33	4.69	-20.64
Ethanol	USD/Gal	1.57	-0.07	-4.27	3.29	-16.49
Naphtha	USD/T	628.81	10.63	1.72	-3.46	0.33
Propane	USD/Gal	0.81	0.02	2.53	14.08	26.56
Uranium	USD/Lbs	77.8	-4.05	-4.95	-4.01	5.14
Methanol	CNY/T	2552.0	37.0	1.47	3.28	3.24
TTF Gas	EUR/MWh	47.91	0.76	1.61	12.28	2.63
UK Gas	GBp/thm	119.24	0.88	0.74	11.82	0.31
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.07	-0.05	-1.21	-6.0	8.53
Coal	USD/T	141.0	-0.75	-0.53	-2.42	14.36
Steel	CNY/T	3299.0	11.0	0.33	-0.78	-16.52
Iron Ore	USD/T	101.95	0.32	0.31	-2.19	-23.06
Aluminum	USD/T	2637.0	24.5	0.94	-0.32	17.96
Lithium	CNY/T	79100.0	6600.0	9.1	10.63	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2626.95	7.67	0.29	-4.5	32.72
Silver	USD/t.oz	30.21	-1.06	-3.39	-10.81	28.06
Platium	null	929.7	-33.9	-3.52	-10.84	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.04		-0.02	-1.89	-3.7	-4.59
USD/CNY	7.27		0.03	0.41	1.68	1.39

第八部分 本周话题 WEEKLY TOPIC



船舶新能源探索命运多舛

曾记得航运业内资深人士谈起航运创新，在海运业第一个吃螃蟹敢于尝试创新的勇者往往面临一些不确定风险，有时会取得巨大成功，而更多场景可能是失败。在不久前看到一则新闻说挪威税务机关对船舶氢燃料电池开发公司Teco 2030提出破产索赔的诉讼。这家在奥斯陆上市的清洁技术集团Teco Group于2024年11月14表示，已向位于诺维克的子公司Teco 2030创新中心（Teco 2030 Innovation Center）提交了一份请愿书，预计定于2024年12月5日在中哈洛加兰地区法院举行听证会，这则新闻不免引起人们的关注和叹息。Teco2030的船舶氢燃料电池自2023年推出以来备受市场关注，也有不少好的消息公布。还记得2024年4月Teco 2030的箱型氢燃料电池获得DNV原则性认可，包括动力管理系统在内的完整发电系统管理，可以集成到船舶的主配电盘上，提供清洁电力。包括燃料准备系统、燃料电池模块保存室、电气技术室、电池室、加热、通风和惯性系统以及气闸的设计。这家由Teco Group持有多数股权的奥斯陆上市公司一直在开发清洁技术系统，包括氢燃料电池和潜在的多气体废气净化系统。Teco 2030一直在与AVL合作开发氢燃料电池，AVL是一家在重型电力系统方面具有专长的奥地利研发公司。该公司还在挪威北部的纳尔维克港建造了一个燃料电池生产中心。当Teco2030推出其氢燃料电池初期得到了市场的关注和推崇，其中Enova的资金帮助TECO 2030和挪威工程公司Blom Maritime进行燃料电池系统的开发和实践。如果成功它将允许某些船舶在挪威峡湾以零排放运行。2023年该公司也有引起行业关注的相关报道，在奥地利格拉茨进行的400千瓦FCM400模块测试中，电池成功地注入了氢气，产生了零排放的电力。该套系统将经过进一步的测试，计划在明年上半年部署第一个系统。去年11月份该公司相关报道显示

将为初创公司Pherousa Green Shipping的6艘开创性的零排放超大型散货船新船提供氢燃料电池。技术的突破往往需要得到市场的普遍认可，敢于尝试的投资人还是凤毛麟角，船东更关注当下船队是否盈利，新能源设备的投入是否会符合营运的好效益至关重要，在创新型设备的市场推广阶段，一旦哪个环节出了阻塞往往需要交学费。I remember senior people in the shipping industry talking about shipping innovation, the first crab in the shipping industry who dares to try to innovate often faces some uncertain risks, sometimes with great success, and more scenarios may be failure. Not long ago, I read a news report that the Norwegian tax authority has filed a bankruptcy claim against the Marine hydrogen fuel cell development company Teco 2030. The Oslo-listed clean technology Group Teco Group said on November 14, 2024 that it had filed a petition with its subsidiary Teco 2030 Innovation Center in Novick, With a hearing scheduled for December 5, 2024, at the Garland District Court in Central Hallow, the news was greeted with concern and sighs. Teco2030 Marine hydrogen fuel cells have attracted market attention since their launch in 2023, and there are also many good news announcements. In April 2024, Teco 2030's tank hydrogen fuel cell was approved by DNV in principle, complete power generation system management, including power management system, can be integrated into the ship's main switch board to provide clean electricity. This includes the design of the fuel preparation system, the fuel cell module storage room, the electrical technology room, the battery room, the heating, ventilation and inertia systems, and the airlock. The Oslo-listed company, majority-owned by Teco Group, has been developing clean technology systems, including hydrogen fuel cells and potential multi-gas exhaust gas purification systems. Teco 2030 has been developing hydrogen fuel cells in collaboration with AVL, an Austrian research and development company with expertise in heavy power systems. The company is also building a fuel cell production center in Narvik Harbor in northern Norway. When Teco2030 launched its hydrogen fuel cell, it received initial attention and admiration from the market, where Enova's funding helped TECO 2030 and Norwegian engineering company Blom Maritime develop and implement the fuel cell system. If successful, it will allow certain ships to operate with zero emissions in the Norwegian fjords. In 2023, the company also has related reports that have attracted the attention of the industry, in the 400 kW FCM400 module test conducted in Graz, Austria, the battery was successfully injected with hydrogen, generating zero-emission electricity. The system will undergo further testing, with the first deployment planned for the first half of next year. In November, the company reported that it would supply hydrogen fuel cells for startup Pherousa Green Shipping's six pioneering zero-emission VLSI vessels. Technological breakthroughs often need to be generally recognized by the market, investors who dare to try are still rare, shipowners are more concerned about whether the current fleet is profitable, whether the investment of new energy equipment will meet the good efficiency of the operation is crucial, in the market promotion stage of innovative equipment, once which link is blocked often need to pay tuition fees.