



2024年 第49周市场周报

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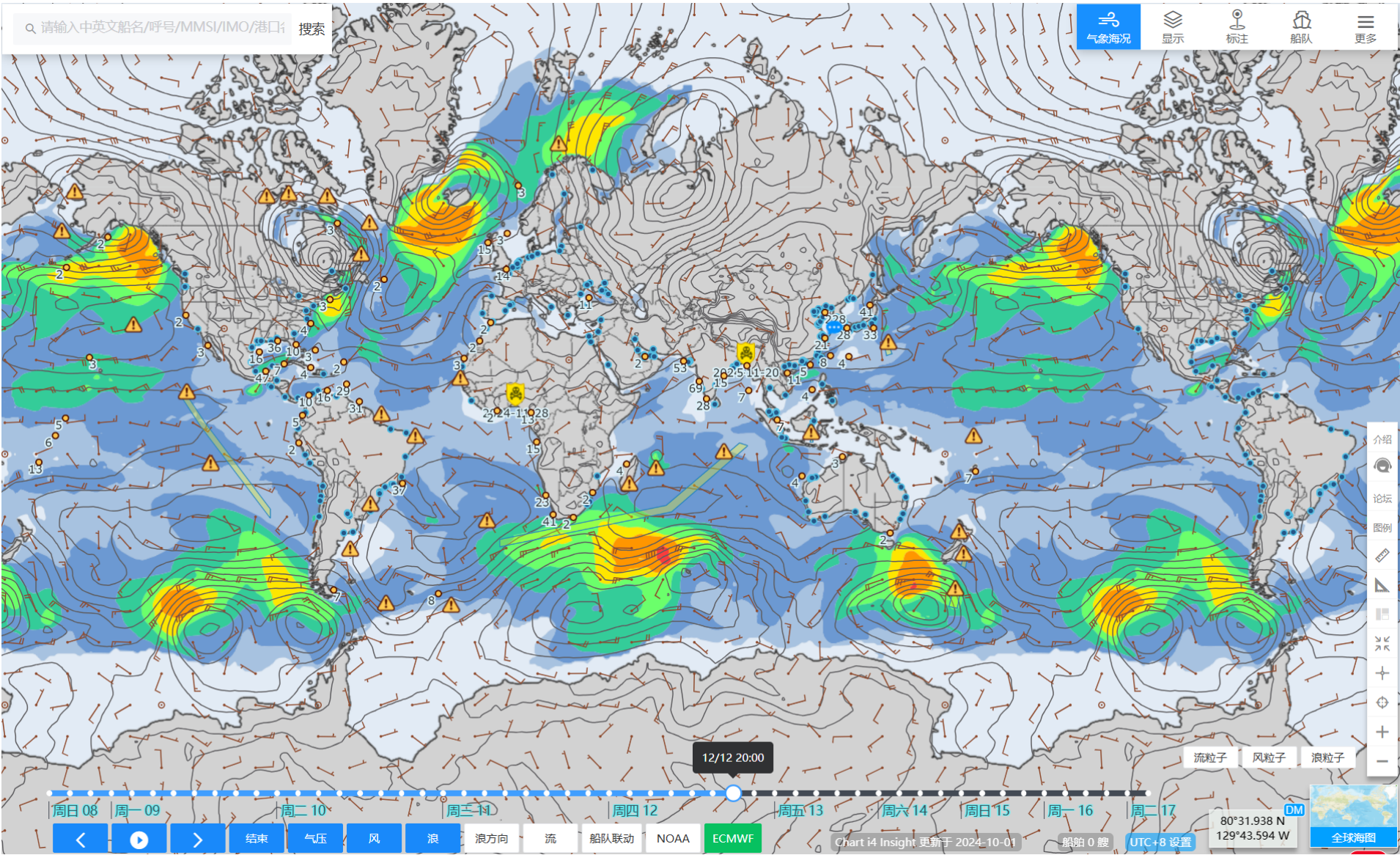
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本周话题 WEEKLY TOPIC

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1079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 1079 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，中浪；黄海风力4-6级，后半周会经历大浪；东海风力3-7级，后半周会经历大浪；台湾海峡7-4级风，台湾海峡前半周有巨浪；南海大部海域风力5-7级，相关海域前半周有巨浪。The coming week the wind in Bohai Sea will be stable with moderate sea. Yellow Sea will become strong with rough sea. And China East Sea will become strong with rough wave. The wind in the Taiwan Strait will become weak with very rough wave in first 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28日，尼日利亚大约15-20名持刀劫匪登上一艘停泊的集装箱船，劫持了值班水手、一名装卸工人和水头。强盗们从集装箱里偷货，被看守人发现后逃跑了。报警并向港口当局报告事故。28.11.2024: 0340 UTC: Posn: 06:25.92N - 003:21.26E, Tin Can Port, Nigeria. Around 15-20 robbers armed with knives boarded a berthed container ship and took hostage the duty AB, a stevedore and the Bosun. The robbers stole cargo from containers and when noticed by a watchman, escaped. Alarm raised and incident reported to the port authorities.

海上事件 Marine Incidents

12月2号，距离Tanjung Laboh 9.1海里（约17公里）一艘汽车运输船发生火灾，该船1,536车位，船名Malaysia Star（1992年建造）。据马来西亚新闻社报道船上的18名菲律宾人和1名马来西亚海员被转移到巡逻船上，船员们都安全无恙。On December 2, a fire broke out on a 1,536-car carrier, Malaysia Star (built in 1992), 9.1 nautical miles (17 km) from Tanjung Laboh. The Malaysian news agency reported that 18 Filipinos and one Malaysian sailor on board were transferred to a patrol boat, and the crew members were safe and sound.

其它 Others

没有 Nil

备注 Remark

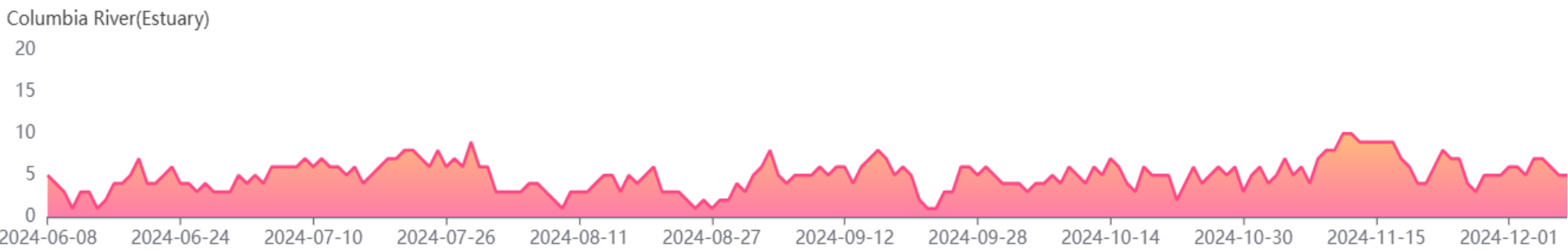
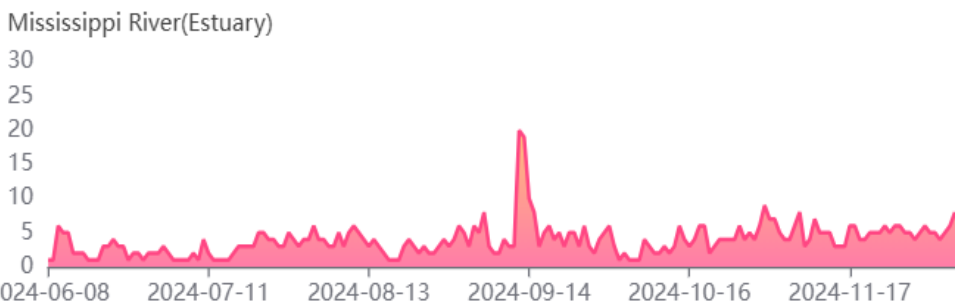
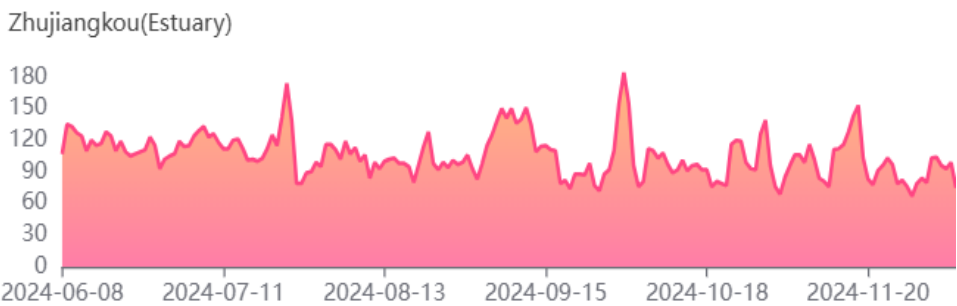
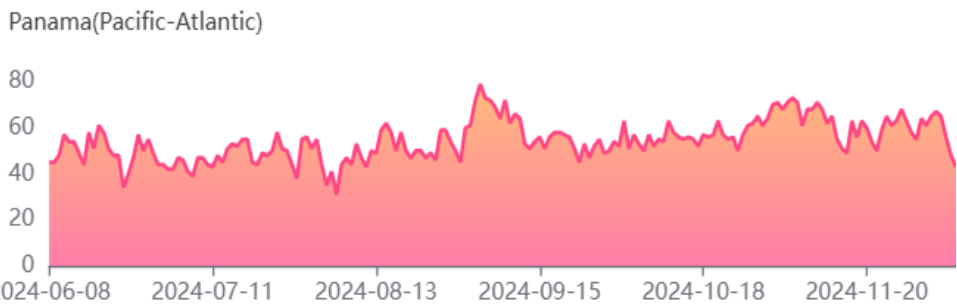
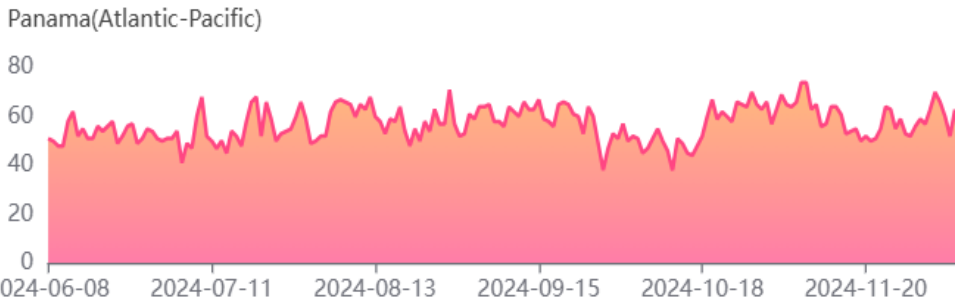
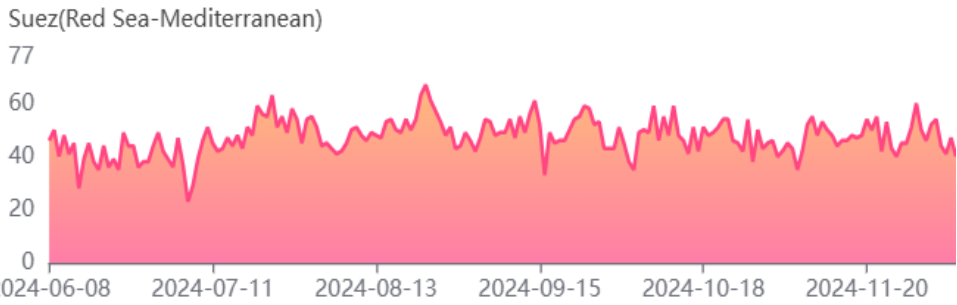
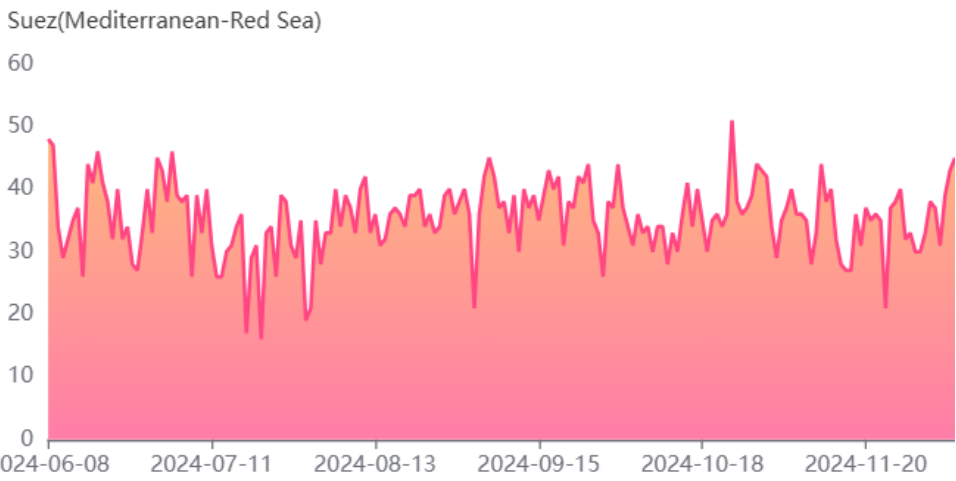
本报告数据截止时间为2024年12月8日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Dec 8th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	1390	-13	44
Miss.Riv.	8	147	2	5
CJK	151	4750	280	423
Pa.Atlan.	63	1679	29	-95
Colum.Riv.	5	191	5	39
Suez.Med.	45	1006	35	-54
Pa.Pac.	43	1728	-28	-59
ZJK	75	2772	67	-49

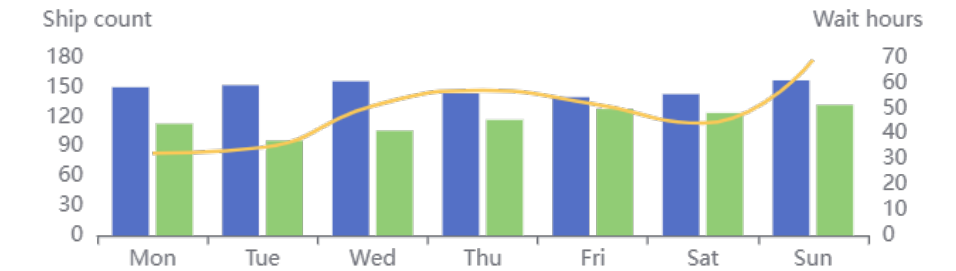
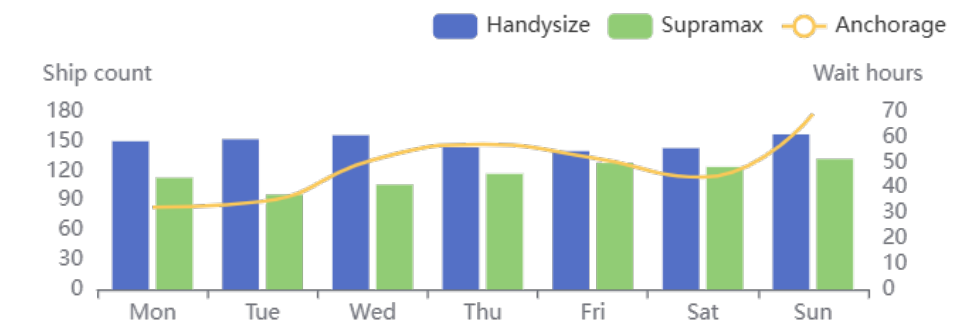


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

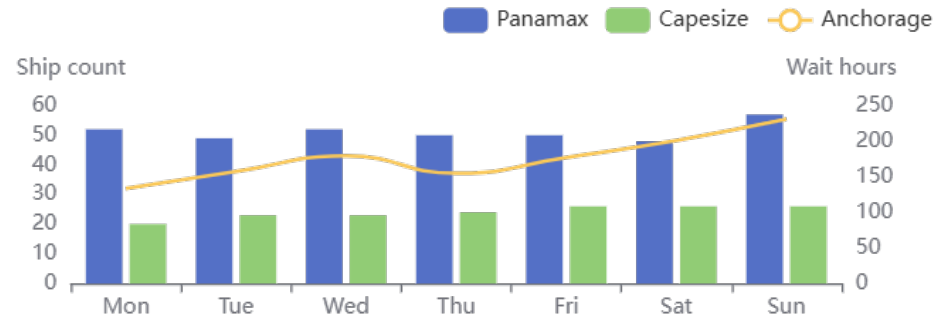
Type	M	T	W	Th	F	Sat	Sun
HDY	150	152	156	144	140	143	157
SMX	113	96	106	117	128	124	132
WT.h.	32.3	34.65	51	57.1	51.8	44.2	69



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

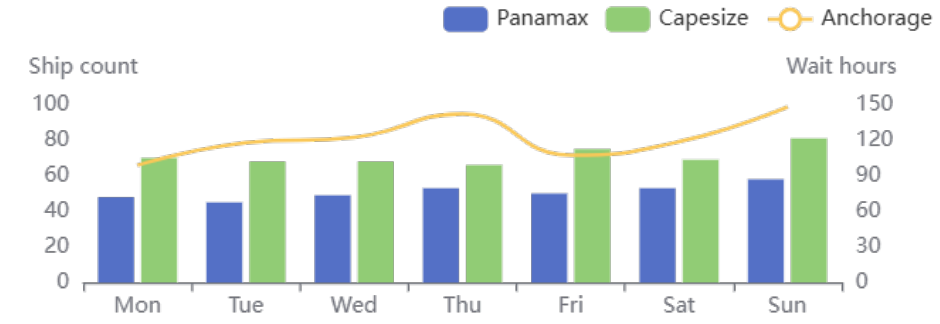
Type	M	T	W	Th	F	Sat	Sun
Pan.	52	49	52	50	50	48	57
Cap	20	23	23	24	26	26	26
WT.h.	133.5	157.5	179.3	154.8	177.2	201.2	231



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

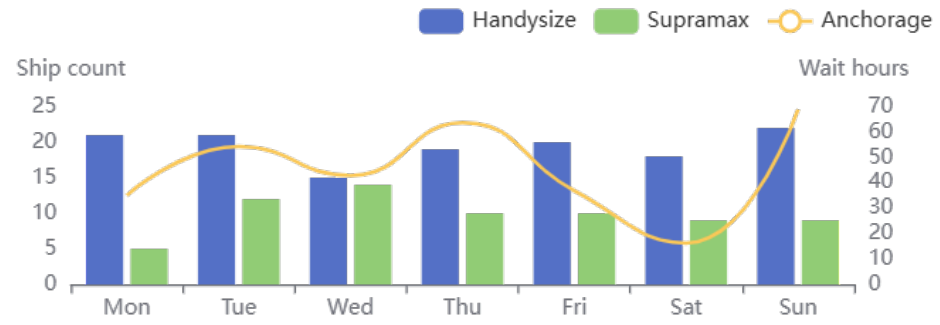
Type	M	T	W	Th	F	Sat	Sun
Pan.	48	45	49	53	50	53	58
Cap	70	68	68	66	75	69	81
WT.h.	98.8	117.8	122.5	142.1	107.4	118.7	148



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

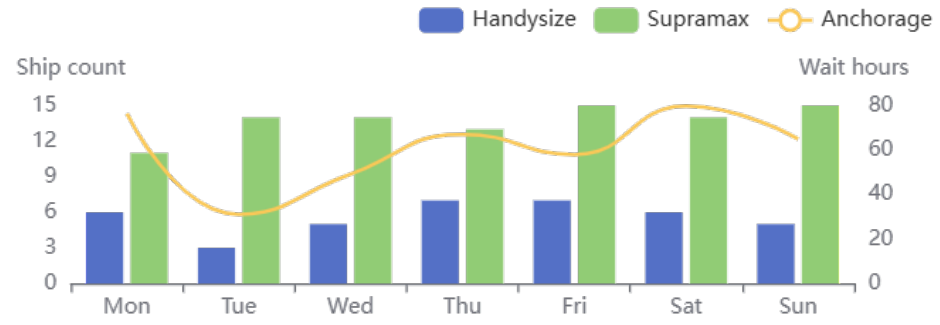
Type	M	T	W	Th	F	Sat	Sun
HDY	21	21	15	19	20	18	22
SMX	5	12	14	10	10	9	9
WT.h.	35.1	54.3	42.9	63.7	36.9	16.3	69



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

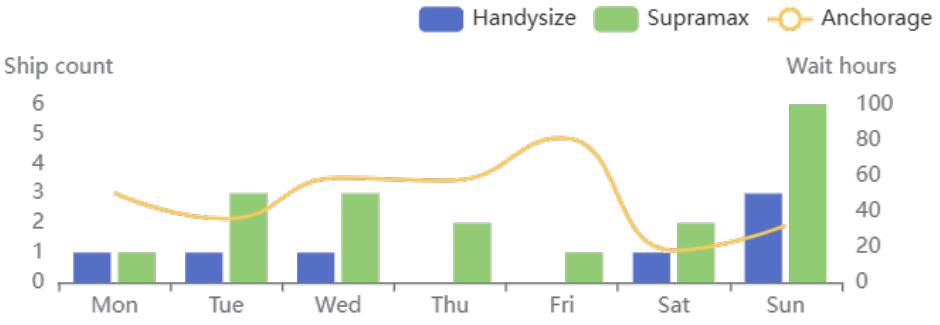
Type	M	T	W	Th	F	Sat	Sun
HDY	6	3	5	7	7	6	5
SMX	11	14	14	13	15	14	15
WT.h.	76.4	31.1	49.2	67.1	58	79.85	65



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

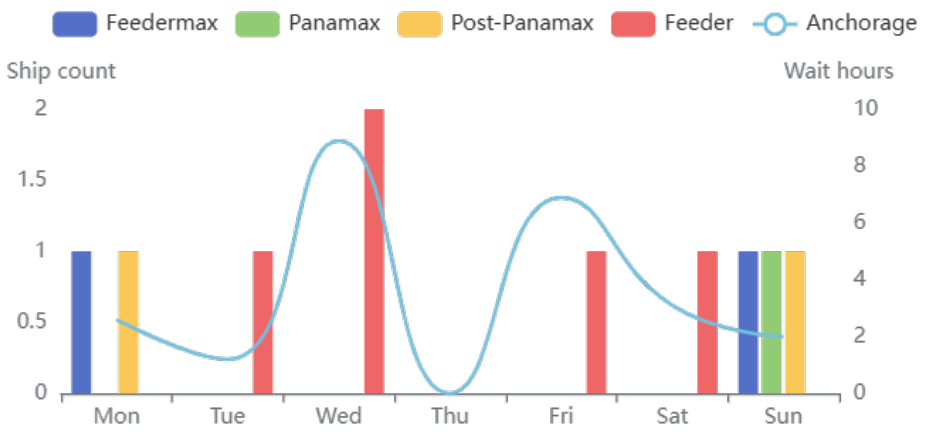
Type	M	T	W	Th	F	Sat	Sun
HDY	1	1	1	0	0	1	3
SMX	1	3	3	2	1	2	6
WT.h.	50.25	35.75	58.75	57.3	81.3	18	32



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

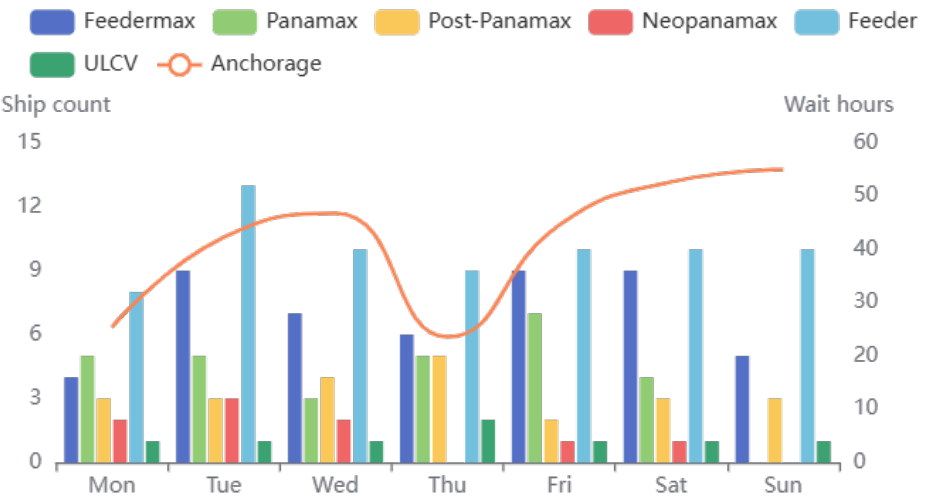
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	0	0	0	0	0	1
Pan.	0	0	0	0	0	0	1
PPx	1	0	0	0	0	0	1
NPx	0	0	0	0	0	0	0
Fd	0	1	2	0	1	1	0
WT.h.	2.6	1.2	8.9	0.0	6.9	3.1	2
Ulcw	0	0	0	0	0	0	0



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

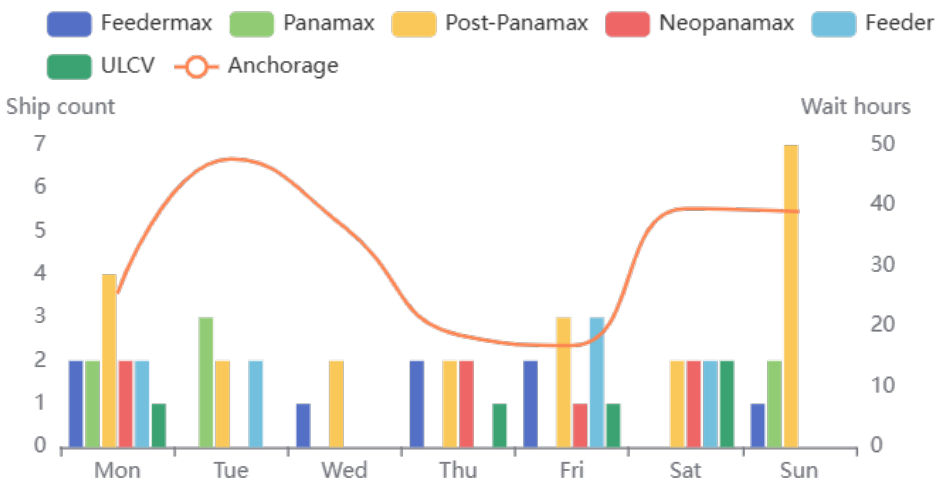
Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	9	7	6	9	9	5
Pan.	5	5	3	5	7	4	0
PPx	3	3	4	5	2	3	3
NPx	2	3	2	0	1	1	0
Fd	8	13	10	9	10	10	10
Ulcw	1	1	1	2	1	1	1
WT.h.	25.4	42.3	46.8	23.6	44.6	52.7	55



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

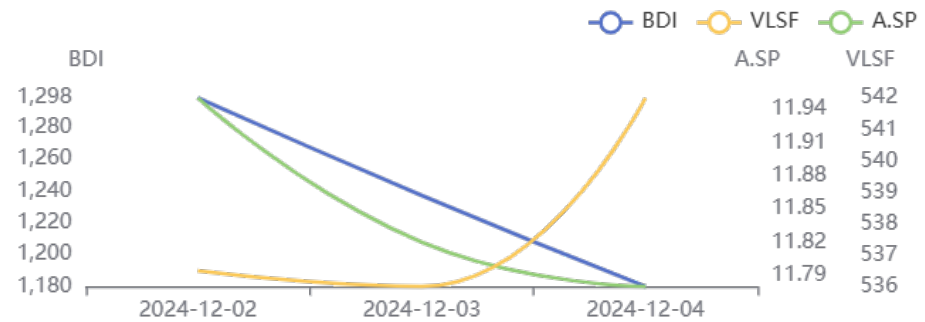
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	0	1	2	2	0	1
Pan.	2	3	0	0	0	0	2
PPx	4	2	2	2	3	2	7
NPx	2	0	0	2	1	2	0
Fd	2	2	0	0	3	2	0
Ulcw	1	0	0	1	1	2	0
WT.h.	25.4	47.7	36.4	18.6	16.8	39.5	39



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

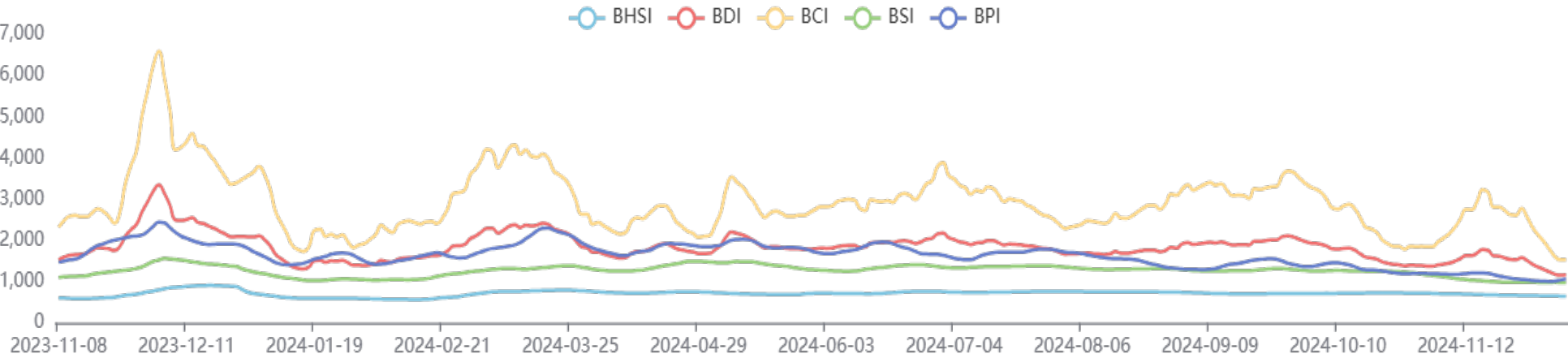
Type	M	T	W	Th	F	Sat	Sun
BDI	979	979	982	979			
VLSF	536.50	536.00	542.00				
A.SP	11.95	11.82	11.78	11.8	11.78	11.71	



第三部分 航运市场 SHIPPING MARKET

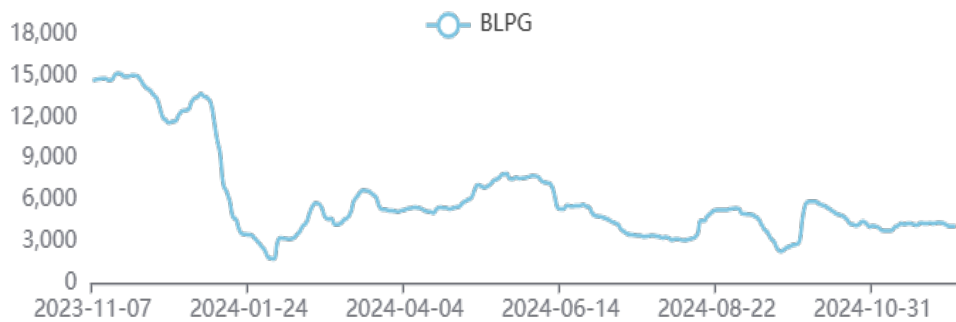
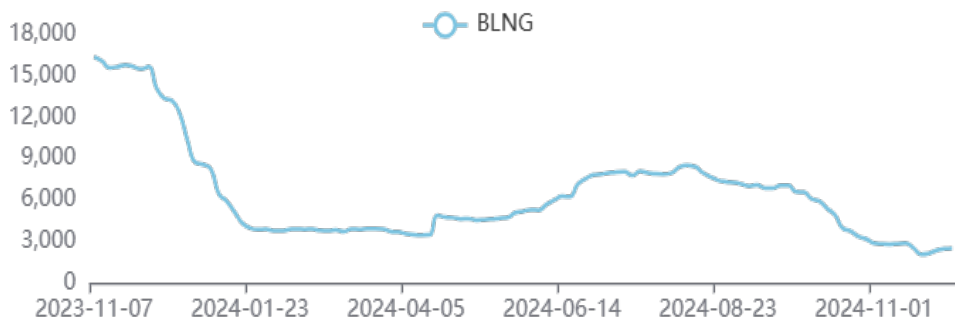
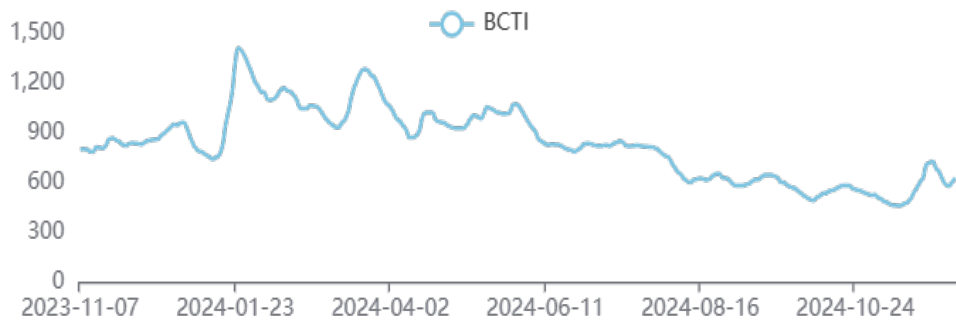
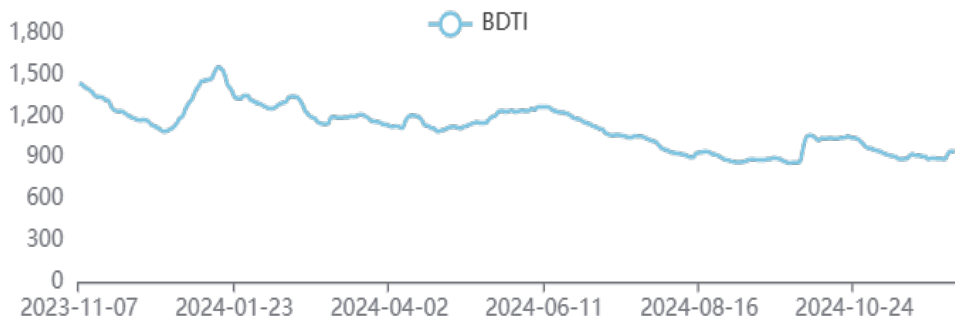
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1167	-187.0	-13.81	-21.94	-59.02
BCI	1535	-598.0	-28.04	-33.72	-70.26
BPI	1067	49.0	4.81	-9.27	-53.83
BSI	974	-6.0	-0.61	-9.73	-37.24
BHSI	644	-15.0	-2.28	-8.39	-24.32



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	943	51.0	5.72	3.29	-19.19
BCTI	625	-38.0	-5.73	34.12	-26.64
BLNG	2510	163.0	6.95	-10.13	-81.2
BLPG	4099	-268.0	-6.14	7.7	-67.76



第四部分 运力分布 SUPPLY DISTRIBUTION

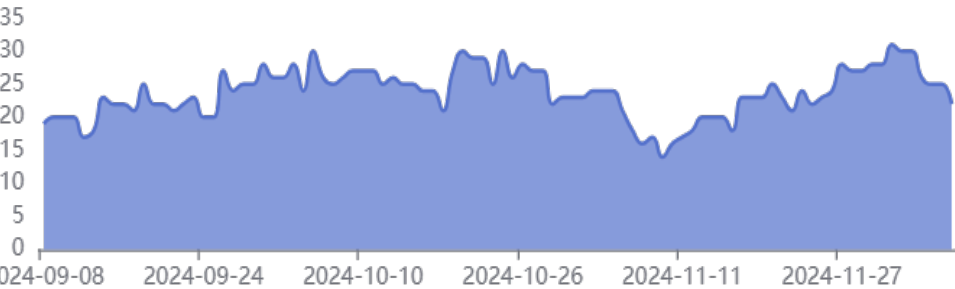


好望角型散货船 Capesize

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.

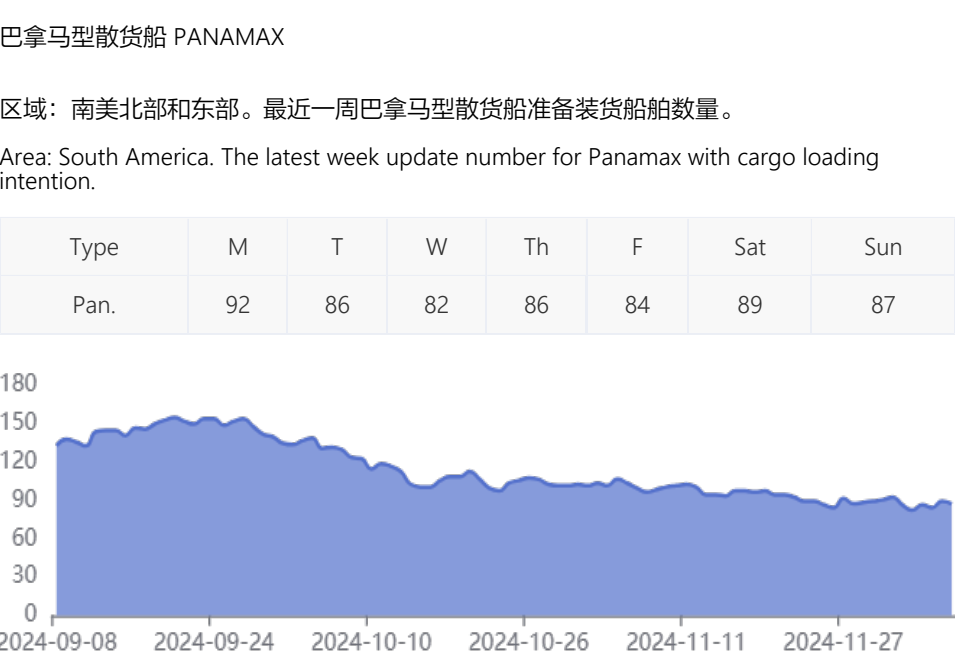
Type	M	T	W	Th	F	Sat	Sun
Cape	31	30	30	26	25	25	22



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.

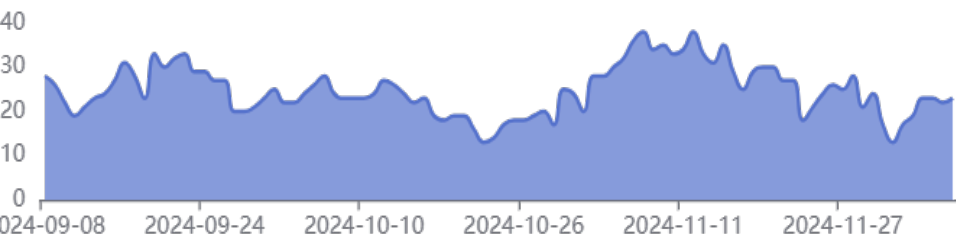
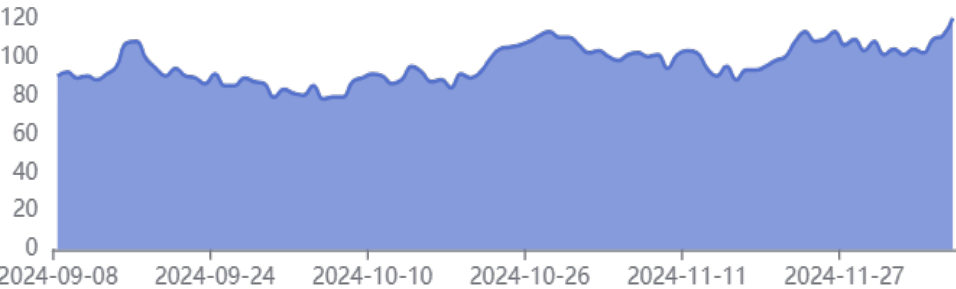
Type	M	T	W	Th	F	Sat	Sun
Cape	13	17	19	23	23	22	23



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	104	101	104	102	109	111	120

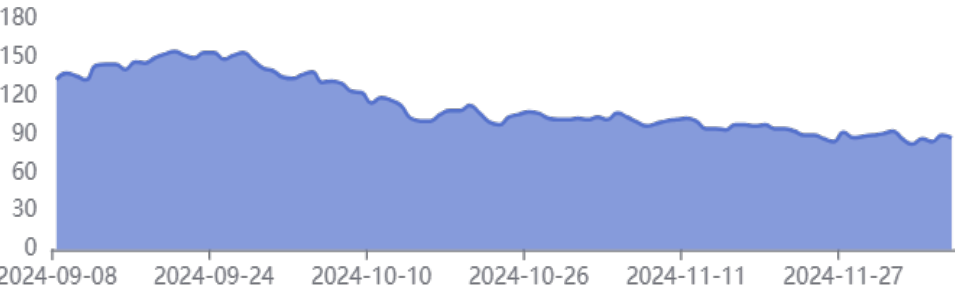


巴拿马型散货船 PANAMAX

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.

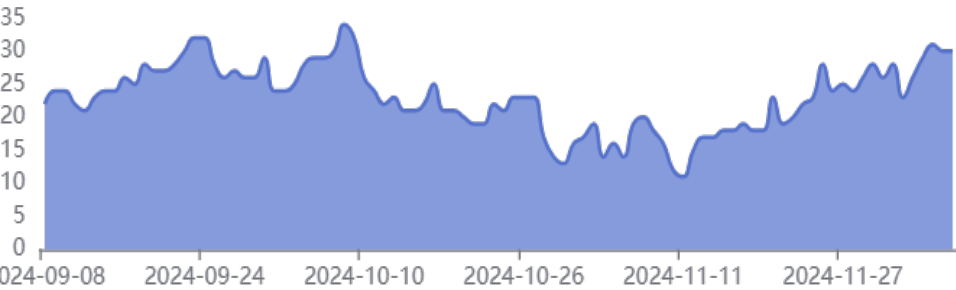
Type	M	T	W	Th	F	Sat	Sun
Pan.	92	86	82	86	84	89	87



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.

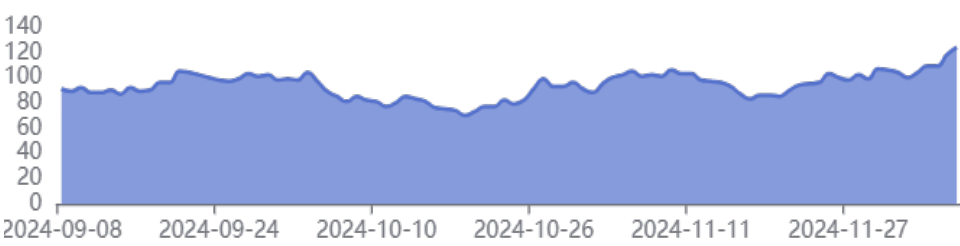
Type	M	T	W	Th	F	Sat	Sun
Pan.	20	17	17	19	24	21	21



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.	104	100	104	109	109	118	124

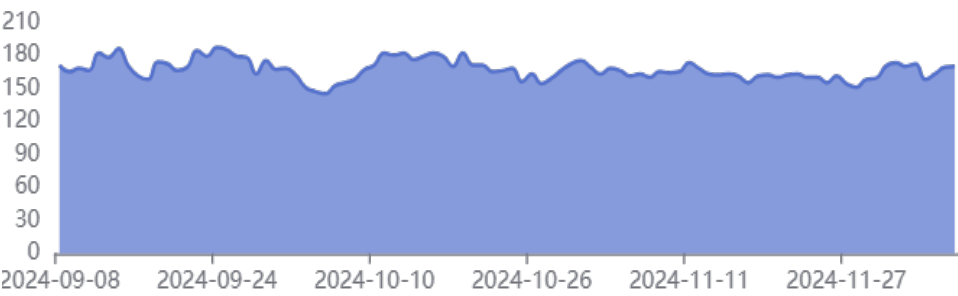


超大灵便型散货 SUPRAMAX

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.

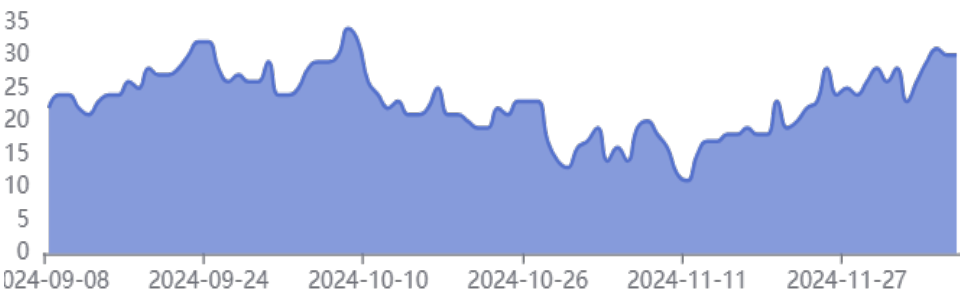
Type	M	T	W	Th	F	Sat	Sun
SMX	173	170	172	158	163	169	170



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.

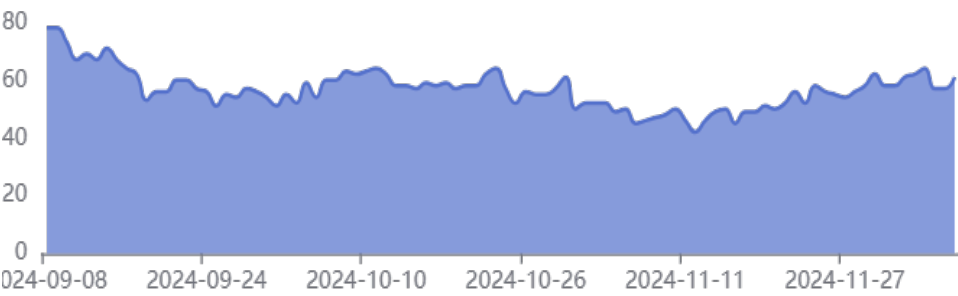
Type	M	T	W	Th	F	Sat	Sun
SMX	28	23	26	29	31	30	30



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.

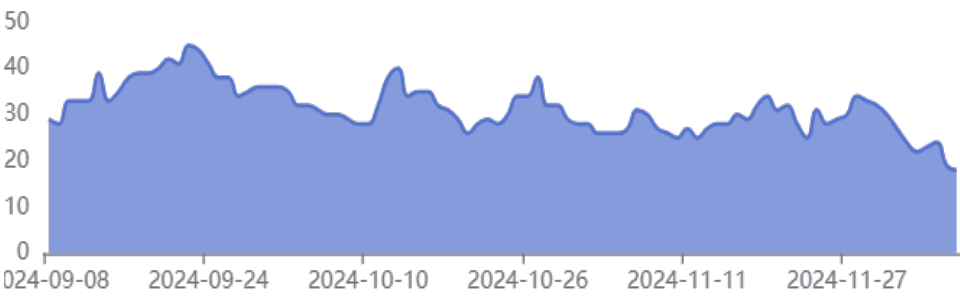
Type	M	T	W	Th	F	Sat	Sun
SMX	27	24	22	23	24	19	18



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.

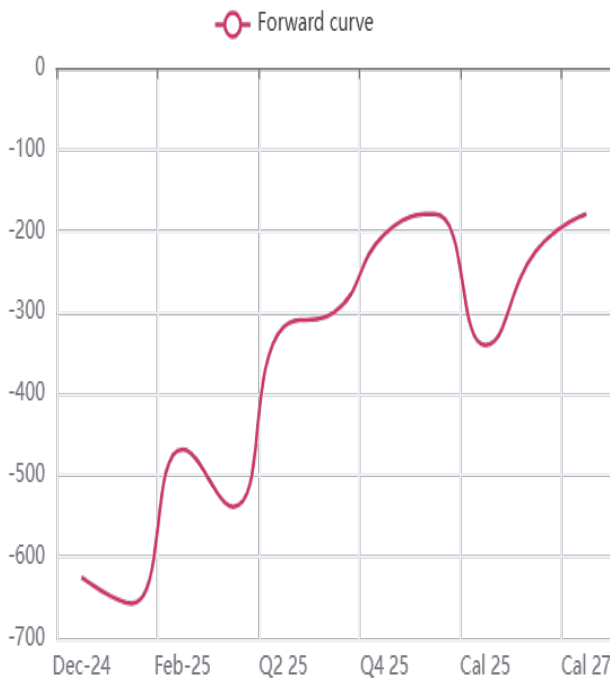
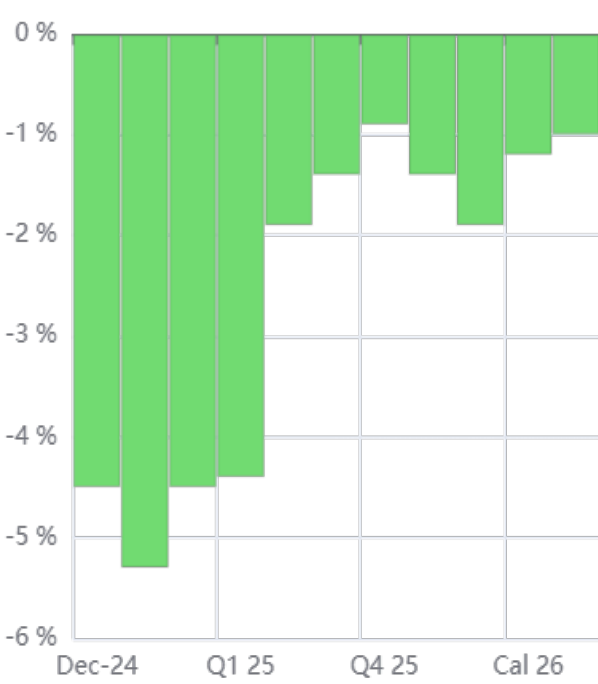
Type	M	T	W	Th	F	Sat	Sun
SMX	58	61	62	64	57	57	61



第五部分 远期运价协议 FFA

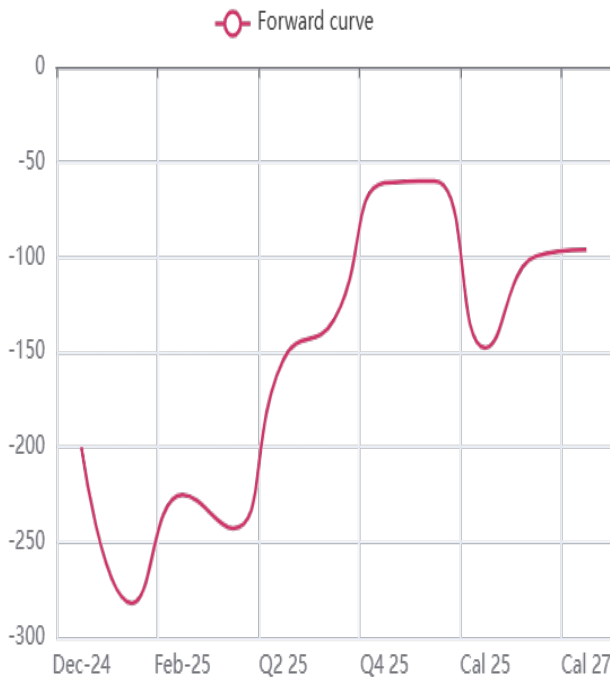
好望角型散货船Capesize

5TC	\$/day	WoW	
Dec-24	13,325.00	-625.0	-4.5 %
Jan-25	11,643.00	-657.0	-5.3 %
Feb-25	9,900.00	-468.0	-4.5 %
Q1 25	11,746.33	-538.33	-4.4 %
Q2 25	16,807.00	-318.0	-1.9 %
Q3 25	21,293.00	-300.0	-1.4 %
Q4 25	22,175.00	-204.0	-0.9 %
Q1 26	13,057.00	-179.0	-1.4 %
Cal 25	18,005.33	-340.08	-1.9 %
Cal 26	18,057.00	-224.75	-1.2 %
Cal 27	18,389.00	-179.0	-1.0 %



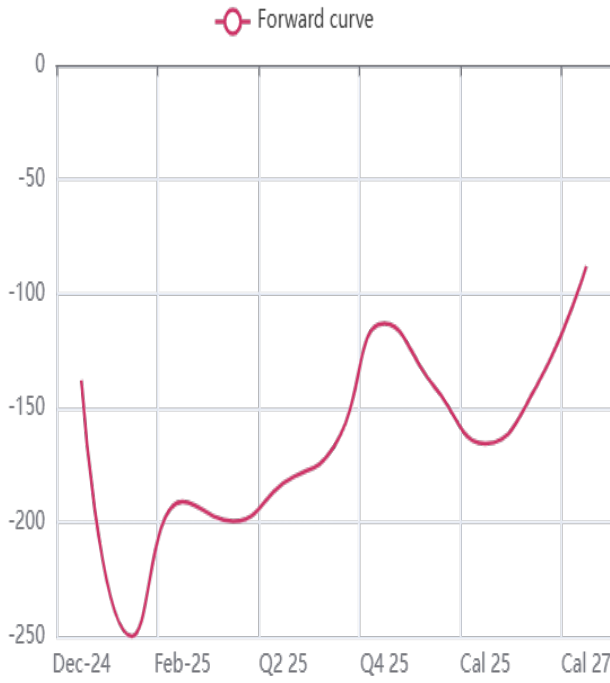
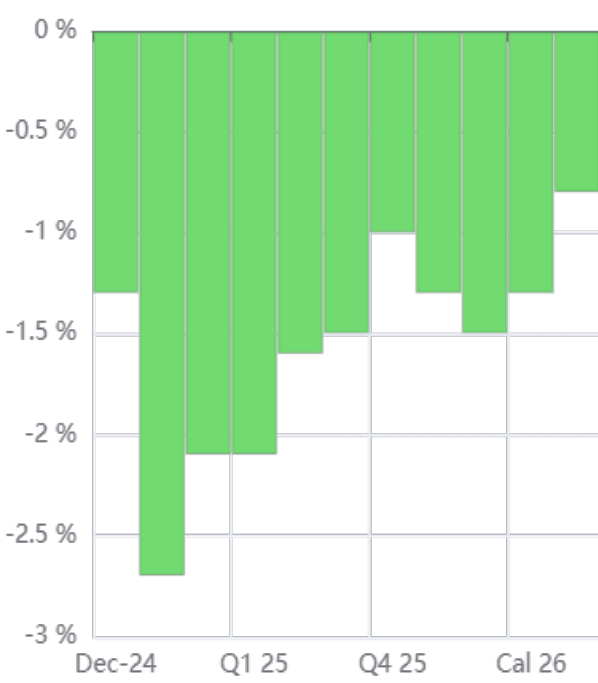
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Dec-24	8,286.00	-200.0	-2.4 %
Jan-25	8,150.00	-282.0	-3.3 %
Feb-25	8,361.00	-225.0	-2.6 %
Q1 25	9,015.67	-242.67	-2.6 %
Q2 25	11,221.00	-154.0	-1.4 %
Q3 25	11,071.00	-133.0	-1.2 %
Q4 25	10,893.00	-61.0	-0.6 %
Q1 26	10,004.00	-60.0	-0.6 %
Cal 25	10,550.17	-147.67	-1.4 %
Cal 26	10,364.25	-99.5	-1.0 %
Cal 27	10,600.00	-96.0	-0.9 %



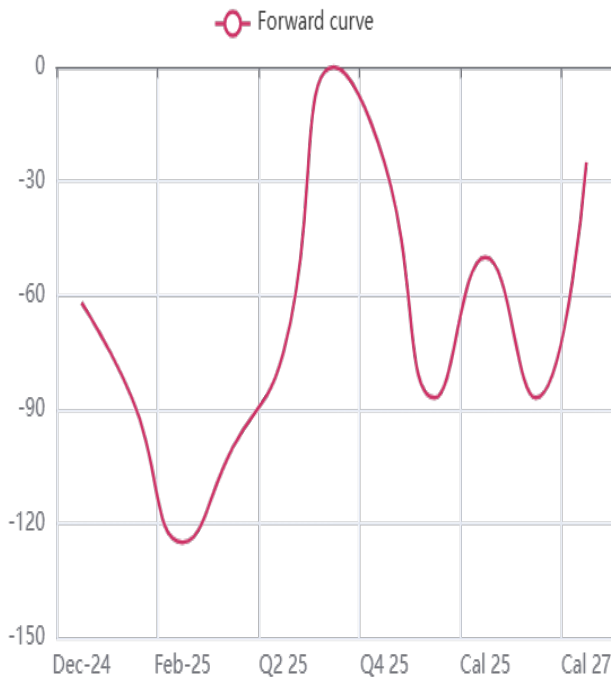
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Dec-24	10,154.00	-138.0	-1.3 %
Jan-25	8,867.00	-250.0	-2.7 %
Feb-25	8,717.00	-191.0	-2.1 %
Q1 25	9,492.00	-199.67	-2.1 %
Q2 25	11,142.00	-183.0	-1.6 %
Q3 25	11,250.00	-167.0	-1.5 %
Q4 25	11,000.00	-113.0	-1.0 %
Q1 26	10,642.00	-141.0	-1.3 %
10,721.00	Cal 25	-165.67	-1.5 %
Cal 26	10,642.00	-141.0	-1.3 %
Cal 27	10,904.00	-88.0	-0.8 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Dec-24	11,363.00	-62.0	-0.5 %
Jan-25	9,838.00	-87.0	-0.9 %
Feb-25	9,250.00	-125.0	-1.3 %
Q1 25	9,896.00	-100.0	-1.0 %
Q2 25	11,050.00	-75.0	-0.7 %
Q3 25	10,975.00	0.0	0.0 %
Q4 25	10,775.00	-25.0	-25.0
Q1 26	10,213.00	-87.0	-0.8 %
Cal 25	10,674.00	-50.0	-0.5 %
Cal 26	10,213.00	-87.0	-0.8 %
Cal 27	10,625.00	-25.0	-0.2 %



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	0.0	0.0	-23.14
Singapore	570.0	469.0	683.0	101.0	0.0	0.0	-12.17
Rotterdam	515.5	450.0	685.0	65.5	0.0	0.0	84.51
Fujairah	555.0	451.0	678.0	104.0	0.0	0.0	46.48
Houston	563.0	462.0	754.5	101.0	0.0	0.0	-18.55

(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	199.0		-3.0	-1.49	-2.93	-7.81
Maize	221.0		-1.0	-0.45	-0.45	-1.18
Soybeans	209.0		0.0	0.0	-0.95	-19.66
Rice	213.0		0.0	0.0	-0.47	-13.75
Barley	215.0		-1.0	-0.46	-0.46	-1.14
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	68.21	-0.45	-0.66	-4.77	-9.13
Brent	USD/Bbl	72.01	-0.72	-0.99	-4.32	-10.1
Natural Gas	USD/MMBtu	3.2	-0.21	-6.16	14.7	16.79
Gasoline	USD/Gal	1.92	-0.07	-3.52	-5.42	-11.11
Heating Oil	USD/Gal	2.18	-0.05	-2.24	-4.8	-22.42
Ethanol	USD/Gal	1.53	-0.04	-2.55	-2.55	-18.62
Naphtha	USD/T	623.14	-5.67	-0.9	-4.55	-0.41
Propane	USD/Gal	0.81	0.0	0.0	0.0	26.56
Uranium	USD/Lbs	77.8	0.0	0.0	-0.51	-3.05
Methanol	CNY/T	2529.0	-23.0	-0.9	2.31	5.24
TTF Gas	EUR/MWh	48.54	0.63	1.31	18.74	7.91
UK Gas	GBp/thm	121.8	2.56	2.15	17.53	5.5
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.07	0.0	0.0	-7.92	7.96
Coal	USD/T	136.0	-5.0	-3.55	-5.49	11.48
Steel	CNY/T	3340.0	41.0	1.24	0.24	-15.31
Iron Ore	USD/T	105.32	3.37	3.31	1.36	-22.56
Aluminum	USD/T	2587.5	-49.5	-1.88	-2.08	15.93
Lithium	CNY/T	78400.0	-700.0	-0.88	8.14	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2640.12	13.17	0.5	-3.41	31.19
Silver	USD/t.oz	30.61	0.4	1.32	-5.73	23.88
Platium	null	942.5	12.8	1.38	-4.29	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.05		0.01	0.96	-3.67	-3.67
USD/CNY	7.3		0.03	0.41	2.67	1.96

第八部分 本周话题 WEEKLY TOPIC



国际社会制裁高压下的俄罗斯原油运输

2024年11月25日，英国外交部宣布最大的针对俄罗斯油轮和俄罗斯保险公司的制裁措施。在针对俄罗斯石油贸易的最新制裁措施中，英国政府点名了30艘船只和两家俄罗斯保险公司 Alfastrakhovanie和VSK，这两家保险公司被指控支持影子船队。欧盟和美国还盯上了数十家俄罗斯公司。

巴拿马船旗国也加入对影子船队实施管制措施，他们将取消六艘油轮的船旗，因其运输俄罗斯石油而被英国列入黑名单。巴拿马登记处没有公布这些船只的名字，但根据hiFleet航运大数据显示，英国的名单中包括8艘悬挂巴拿马船旗的油轮。

总部位于莫斯科的Argo油轮集团（Argo Tanker Group）的一艘阿芙拉油轮被滞留印度港口，突显出俄罗斯船东在受到高压制裁的环境下经营多少发生问题并开始出现对外支付的困境。此滞留事件发生在11月底，一艘108,900载重吨的原油运输船Unity（2009年建造）在印度蒙德拉港被Guma Tech Marine Services扣押。Guma Tech Marine Services是一家总部位于巴夫纳加尔（Bhavnagar）的船舶服务商，主要业务是维修船舶和提供船舶备件公司。

随着国际社会针对俄罗斯油轮制裁的深入，俄罗斯国有航运公司Sovcomflot的利润和现金储备出现萎缩，但仍能从油轮和天然气运输中赚取数亿美元利润。该公司2024年迄今的收益大幅下降，这家

在莫斯科上市的油轮和天然气运输船船东表示，在截至9月30日的9个月里，该公司实现了5.05亿美元的净利润，而2023年这个时期为7.02亿美元。

市场总是唯利是图，虽然俄罗斯受到各种制裁打击，但是市场也暗度陈仓从俄罗斯转运超值的石油，据市场信息每月从希腊转运的俄罗斯石油有100万桶。船只一般会在船对船的转运过程中关闭其AIS系统，以掩盖船上石油的来源。在意大利奥古斯塔港（Augusta）附近也有定期的船对船的转运。

根据hiFleet航运大数据分析，俄罗斯可以动用近600艘油轮来保持其石油的出口。影子油轮船队在俄罗斯石油运输中的份额在2024年达到创纪录水平，全球更有超过800艘各类油轮参与受制裁的石油运输，载重吨超过1亿载重吨。

On November 25, 2024, the British Foreign Office announced the largest sanctions against Russian oil tankers and Russian insurance companies. In the latest sanctions against the Russian oil trade, the British government named 30 vessels and two Russian insurance companies, Alfastrakhovanie and VSK, which have been accused of supporting the shadow fleet. The EU and US have also targeted dozens of Russian companies.

The flag state of Panama has also joined controls on the shadow fleet, removing the flags of six tankers blacklisted by the UK for transporting Russian oil. The names of the vessels were not released by the Panamanian registry, but according to hiFleet shipping big Data, the British list includes eight tankers flying the flag of Panama.

The detention of an Afra Tanker from the Moscow-based Argo Tanker Group in an Indian port highlights how Russian shipowners are having trouble operating in a high-pressure sanctions environment and starting to struggle with foreign payments. The holdup occurred at the end of November when the 108,900 DWT crude oil carrier Unity (built in 2009) was seized by Guma Tech Marine Services at Mundra Port, India. Guma Tech Marine Services is a Bhavnagar based Marine service company whose main business is repairing ships and supplying Marine spare parts.

Sovcomflot, Russia's state-owned shipping company, has seen its profits and cash reserves shrink as international sanctions against Russian oil tankers deepen, but it still earns hundreds of millions of dollars from tanker and gas shipments. The company's earnings have fallen sharply so far in 2024, with the Moscow-listed owner of oil tankers and gas carriers saying it made a net profit of \$505 million for the nine months ended Sept. 30, compared with \$702 million for the period in 2023.

The market has always been profit-driven, and although Russia has been hit by various sanctions, the market has also secretly transferred valuable oil from Russia. According to market information, 1 million barrels of Russian oil are transferred from Greece every month. Ships typically turn off their AIS systems during ship-to-ship transfers to mask the origin of the oil on board. There are also regular ship-to-ship transfers near the port of Augusta, Italy. According to hiFleet Shipping Big Data analysis, Russia can use nearly 600 tankers to maintain its oil exports. The share of the shadow tanker fleet in Russian oil shipments reached a record level in 2024, with more than 800 tankers of all types involved in sanctioned oil shipments worldwide, representing more than 100 million deadweight tons.