



2024年 第50周市场周报

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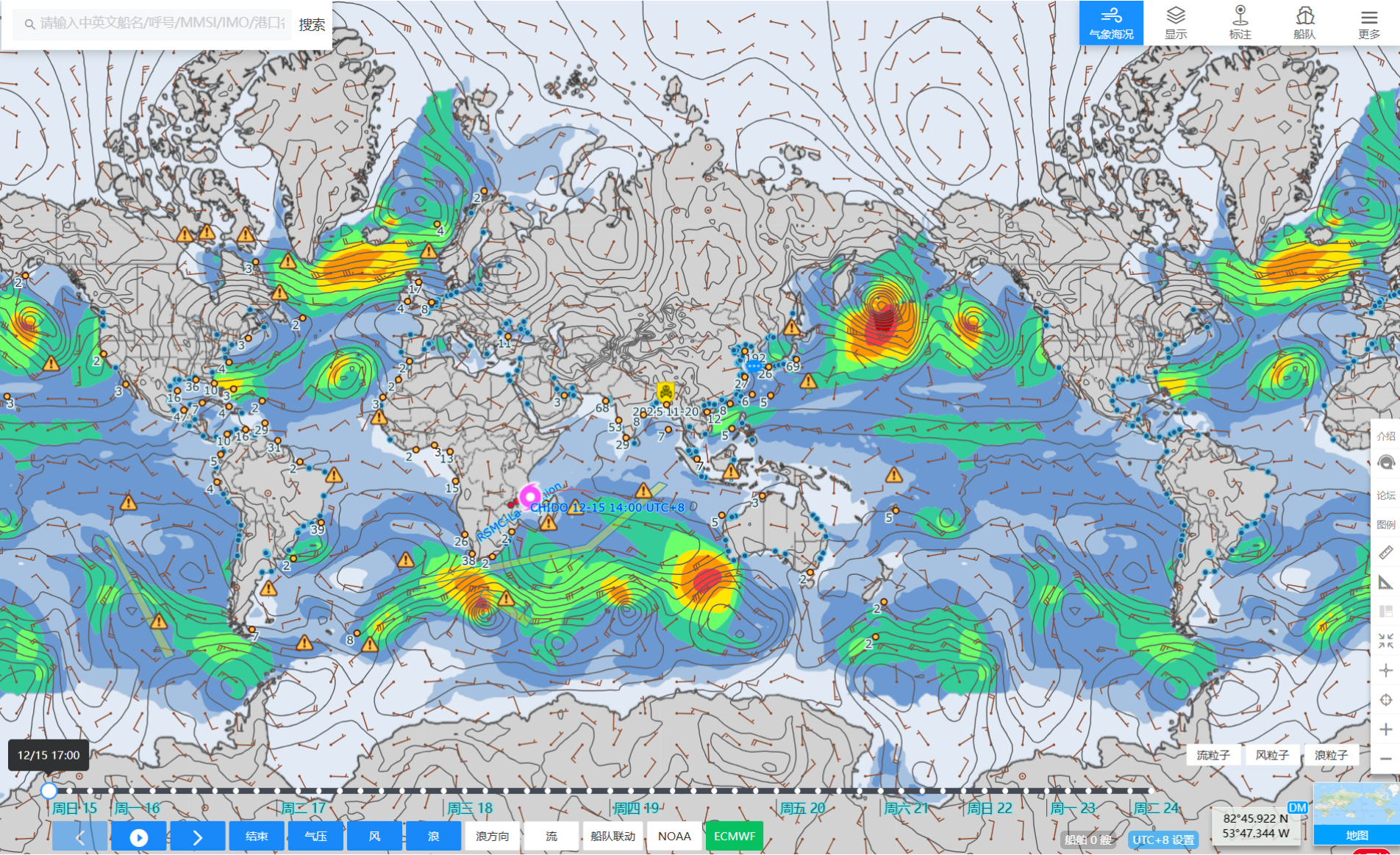
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最新商品价格 LATEST COMMODITIES PRICE

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1032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 1032 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3-5级，有时中浪；黄海风力4-7级，后半周经历巨浪；东海风力4-7级，后半周会经历大浪；台湾海峡6-7级风，台湾海峡后半周有巨浪；南海大部海域风力6-7级，相关海域有巨浪。太平洋北部和北大西洋的低气压都开始变得活跃。The coming week the wind in Bohai Sea will be moderate with moderate sea occasionally. Yellow Sea will become strong with very rough sea late of the week. And China East Sea will become strong as well with rough wave. The wind in the Taiwan Strait will stay strong with very rough in late of the week. In most of the South China Sea the wind will stay strong with very rough sea. The low pressure activities become frequent both in North of Pacific and North of Atlantic.

海盗事件 Piracy

12月09日，新加坡海峡。在一艘油轮的例行巡查中，值班人员发现应急发电机室的挂锁坏了，仓库被盗。09.12.2024: 0005 UTC: Posn: 01:03.5N – 103:39.8E, Singapore Straits. During routine rounds onboard a tanker underway duty crew noticed the padlock to the emergency generator room broken and stores stolen.

海上事件 Marine Incidents

12月9日据多家媒体报道，一艘中国控制的重吊船在离开西班牙时，船上的两个巨型龙门吊倒塌，造成了损坏。这起事故发生在26500载重吨的Shang De Wu Yi Shan轮（2024年建造），阿科鲁尼亚港相关货物可能受损。A Chinese-controlled heavylift vessel suffered damage after its cargo of two giant gantry cranes collapsed while the ship was off Spain, according to various media reports. The casualty involving the 26,500-dwt heavy load carrier Shang De Wu Yi Shan (built 2024) might resulted in a loss of the cargo off the port of A Coruna.

其它 Others

没有 Nil

备注 Remark

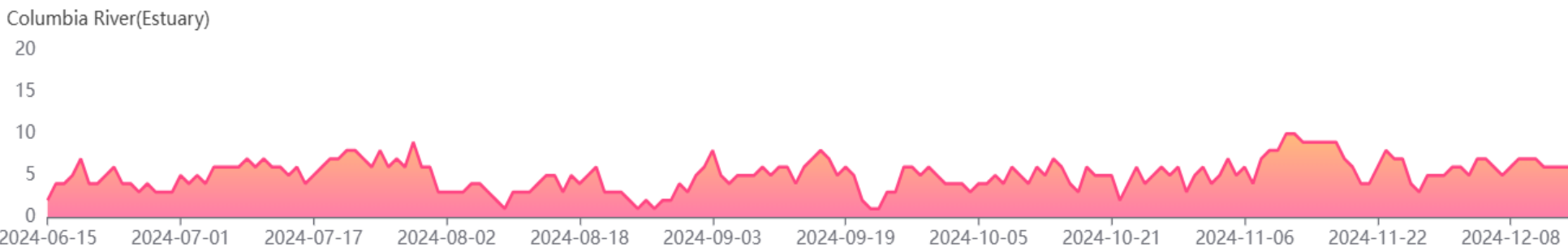
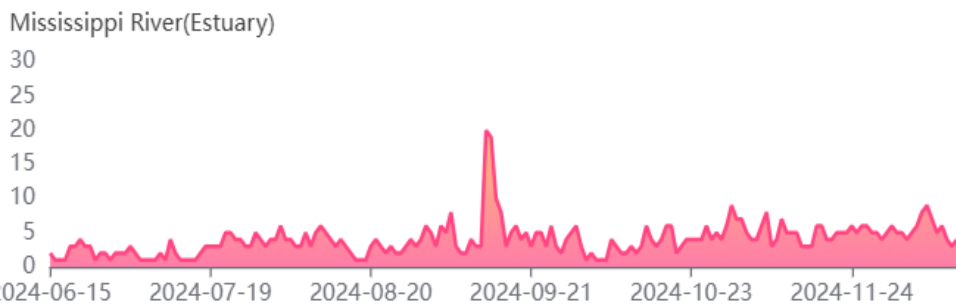
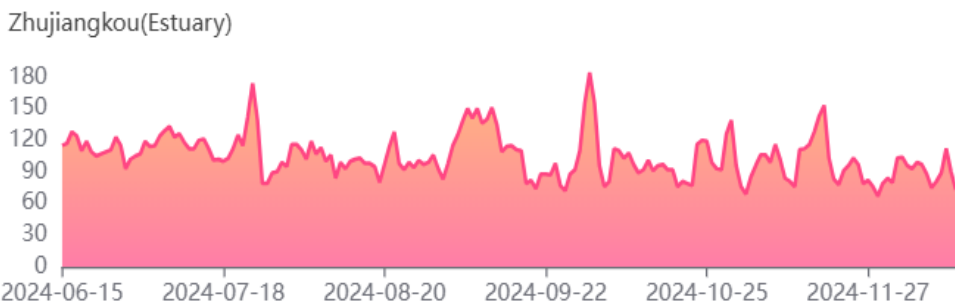
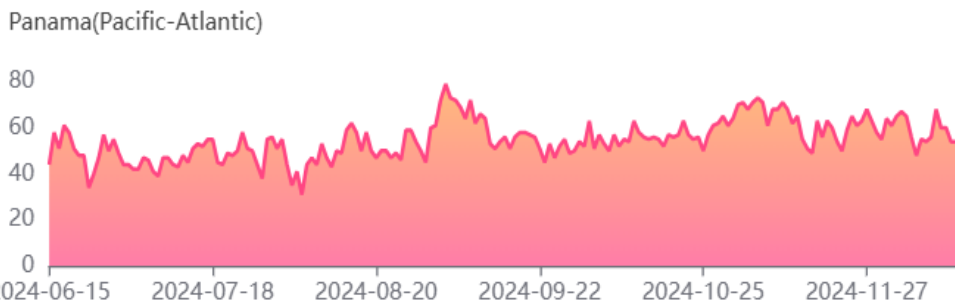
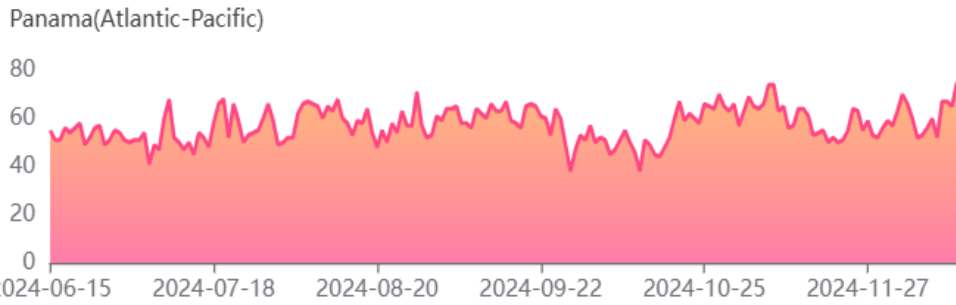
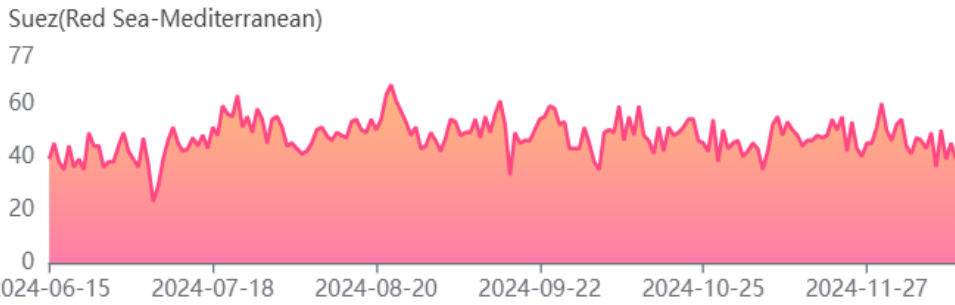
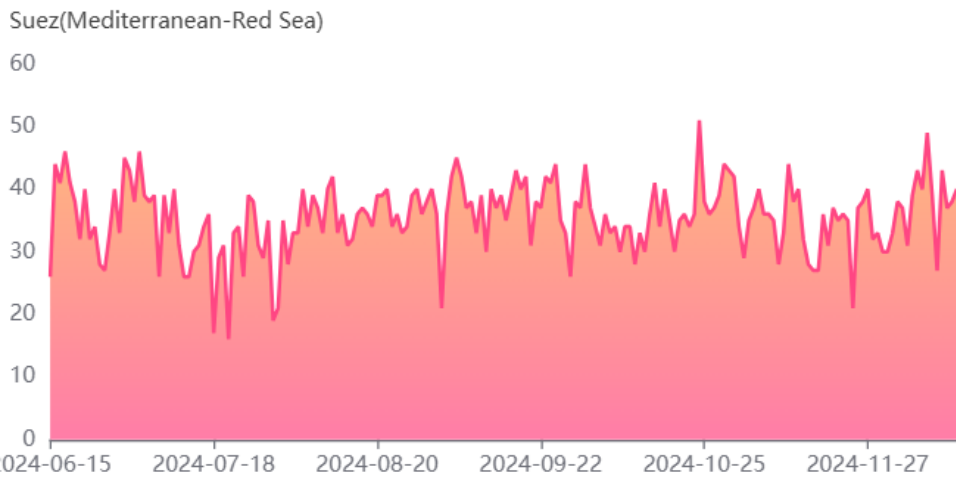
本报告数据截止时间为2024年12月15日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Dec 15th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	39	1362	-33	8
Miss.Riv.	4	154	2	14
CJK	139	4382	-273	-207
Pa.Atlan.	75	1691	15	-143
Colum.Riv.	6	173	3	-8
Suez.Med.	40	1032	22	-18
Pa.Pac.	54	1725	-20	-88
ZJK	73	2694	-51	-249

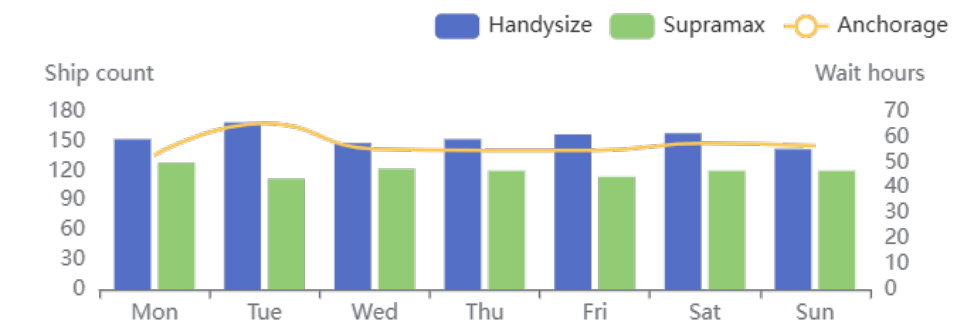


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

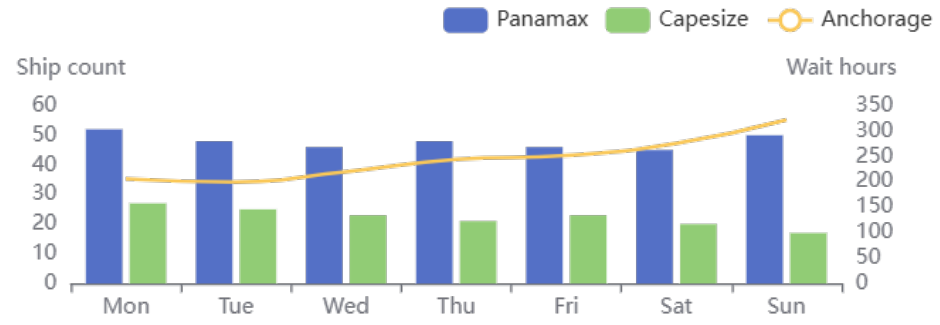
Type	M	T	W	Th	F	Sat	Sun
HDY	152	169	148	152	157	158	142
SMX	128	112	122	120	114	120	120
WT.h.	52.8	65.4	55.3	54.8	54.8	57.6	56.5



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

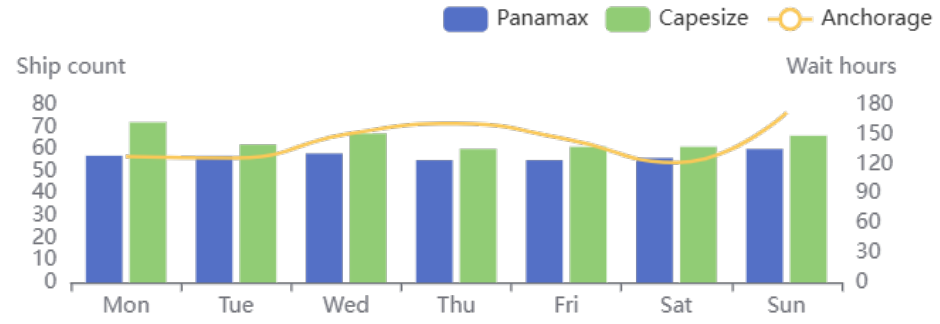
Type	M	T	W	Th	F	Sat	Sun
Pan.	52	48	46	48	46	45	50
Cap	27	25	23	21	23	20	17
WT.h.	205.6	199.8	220	244	251.8	275.8	322



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

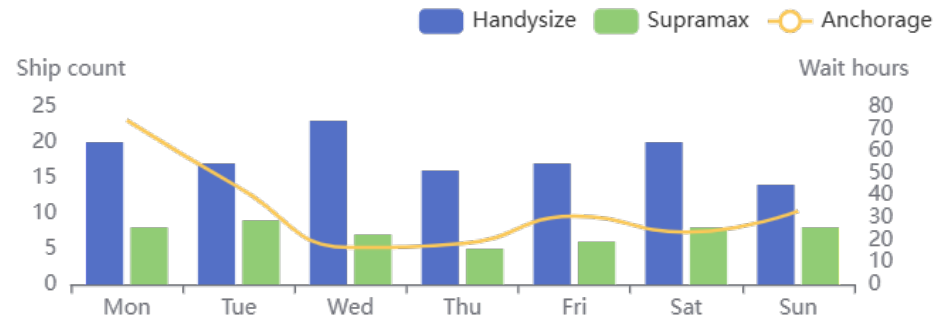
Type	M	T	W	Th	F	Sat	Sun
Pan.	57	57	58	55	55	56	60
Cap	72	62	67	60	61	61	66
WT.h.	127.6	126	150	160.9	145	121.3	172



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

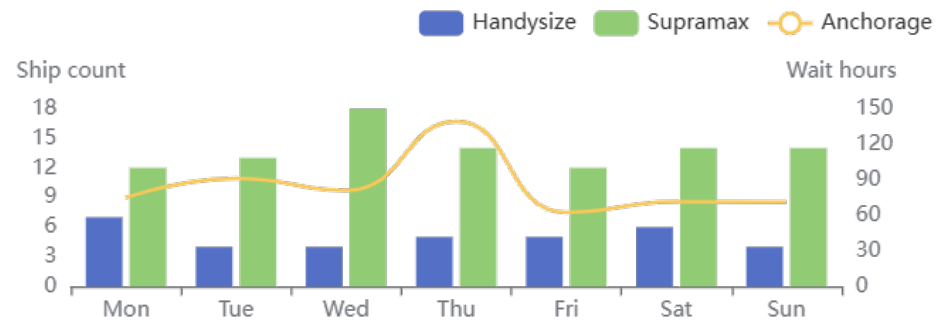
Type	M	T	W	Th	F	Sat	Sun
HDY	20	17	23	16	17	20	14
SMX	8	9	7	5	6	8	8
WT.h.	73.85	43.7	16.6	18.4	30.7	23.5	33



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

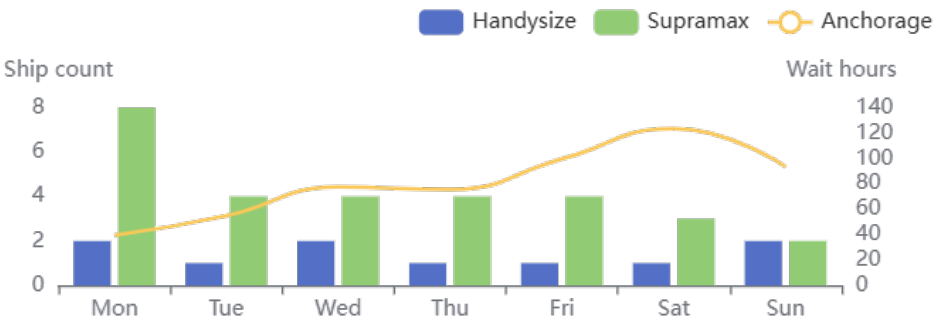
Type	M	T	W	Th	F	Sat	Sun
HDY	7	4	4	5	5	6	4
SMX	12	13	18	14	12	14	14
WT.h.	74.8	91.3	81.0	139.3	62.4	71.5	71



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

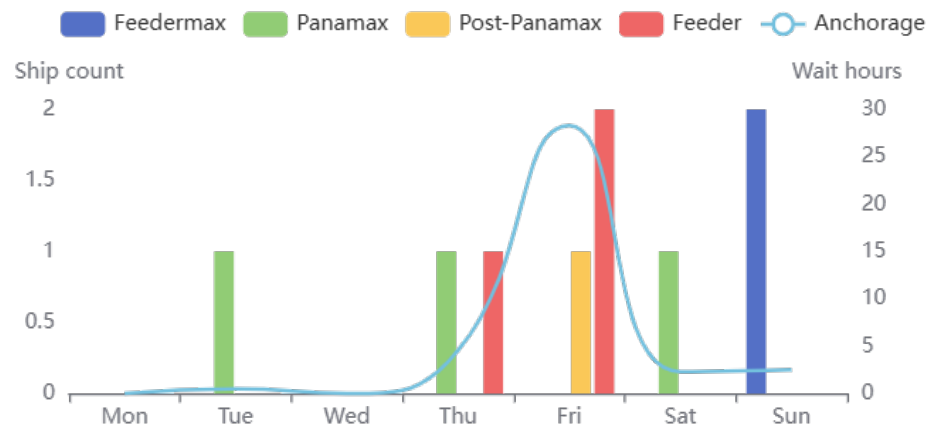
Type	M	T	W	Th	F	Sat	Sun
HDY	2	1	2	1	1	1	2
SMX	8	4	4	4	4	3	2
WT.h.	39.5	54.9	77.5	75.6	99.6	123.6	93.5



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

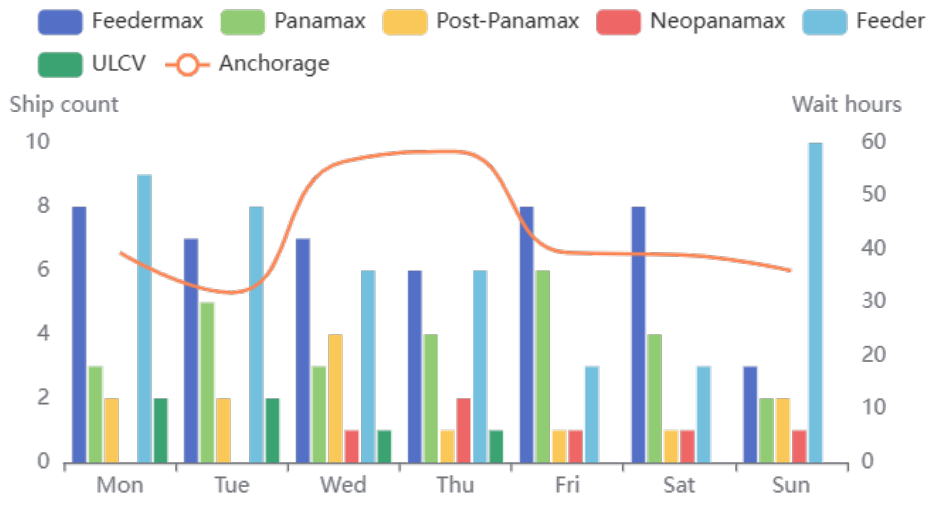
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	0	2
Pan.	0	1	0	1	0	1	0
PPx	0	0	0	0	1	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	1	2	0	0
WT.h.	0.0	0.5	0.0	4.55	28.3	2.3	2.5
Ulcw	0	0	0	0	0	0	0



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

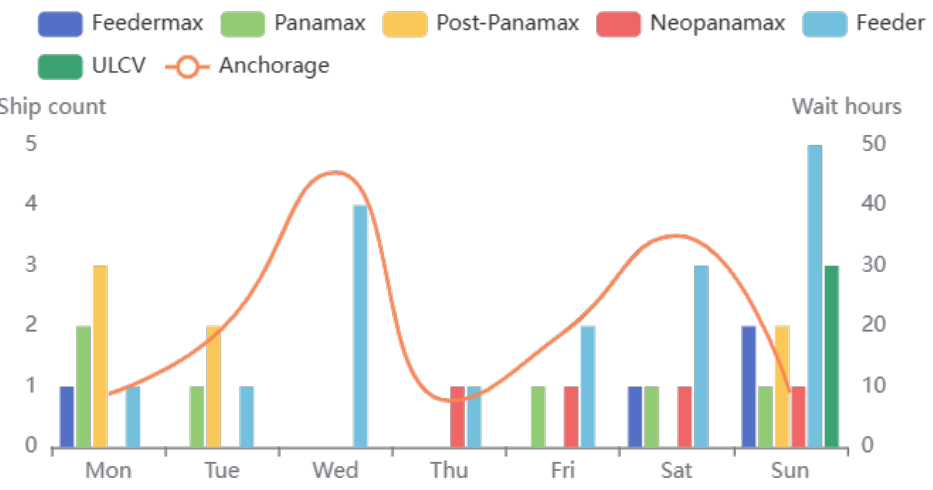
Type	M	T	W	Th	F	Sat	Sun
F.ma.	8	7	7	6	8	8	3
Pan.	3	5	3	4	6	4	2
PPx	2	2	4	1	1	1	2
NPx	0	0	1	2	1	1	1
Fd	9	8	6	6	3	3	10
Ulcw	2	2	1	1	0	0	0
WT.h.	39.4	31.9	56.5	58.4	39.4	39	36



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

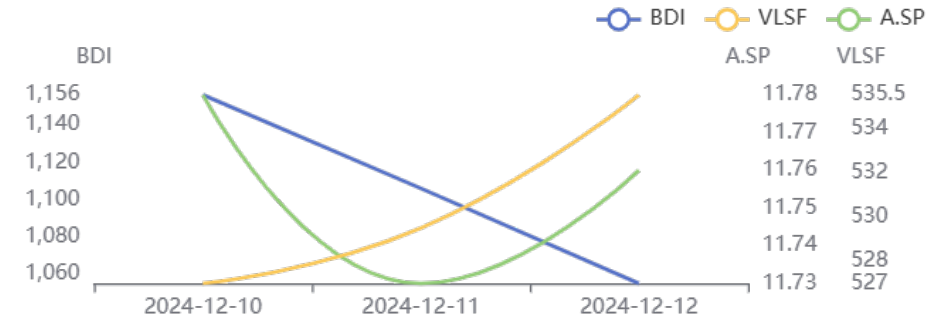
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	0	0	0	0	1	2
Pan.	2	1	0	0	1	1	1
PPx	3	2	0	0	0	0	2
NPx	0	0	0	1	1	1	1
Fd	1	1	4	1	2	3	5
Ulcw	0	0	0	0	0	0	3
WT.h.	8.8	19.6	45.5	7.7	18.9	35.0	9



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

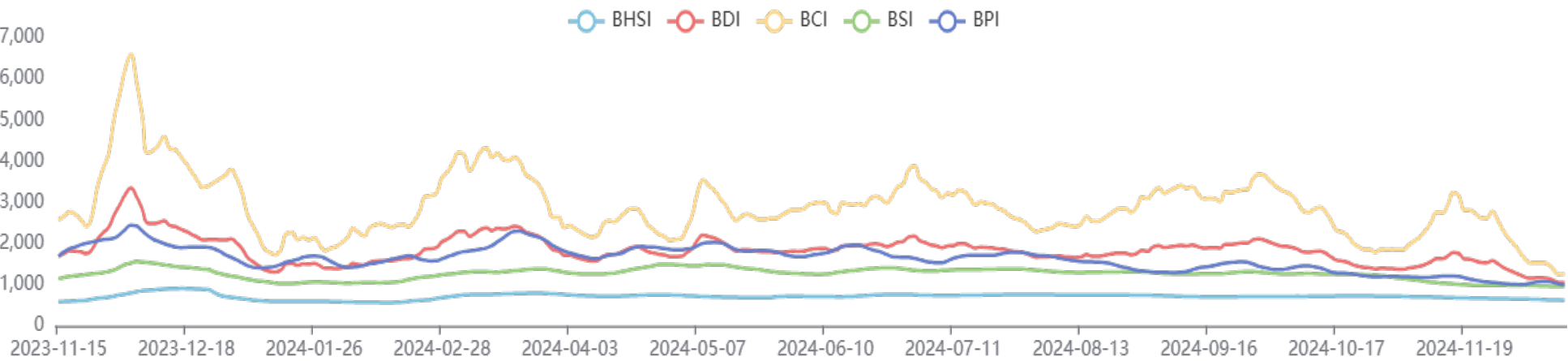
Type	M	T	W	Th	F	Sat	Sun
BDI	967	962	961				
VLSF	530.00	527.00	529.50	535.50			
A.SP	11.63	11.78	11.73	11.76	11.75	11.76	



第三部分 航运市场 SHIPPING MARKET

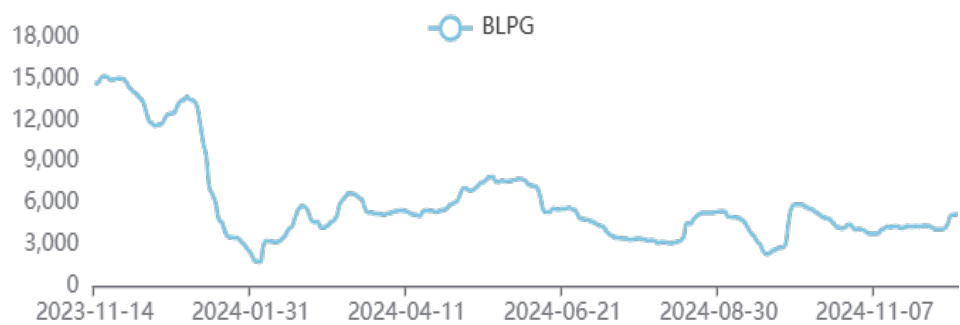
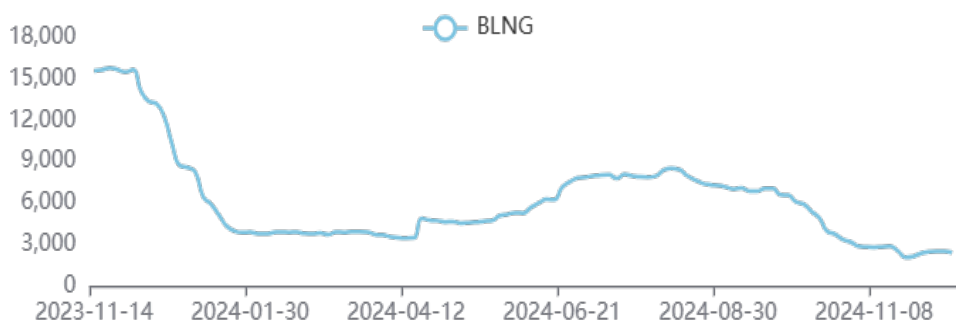
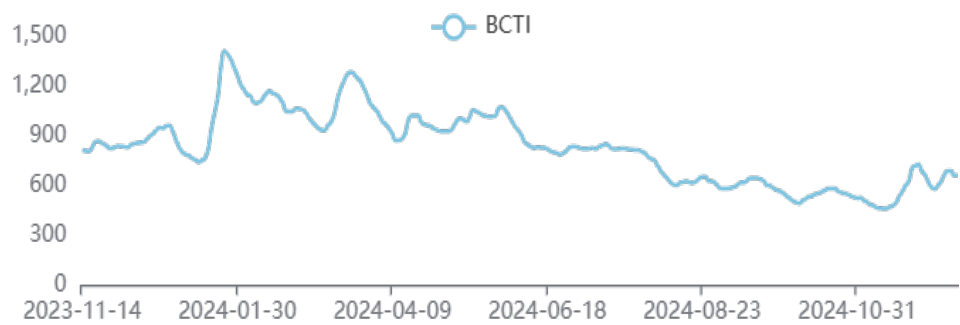
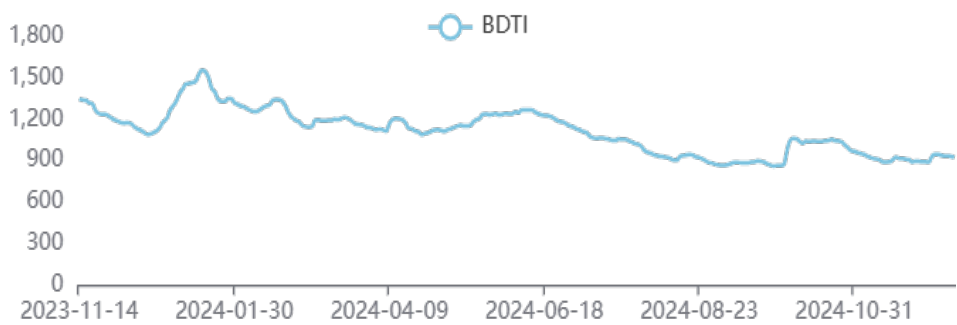
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1051	-116.0	-9.94	-41.12	-56.89
BCI	1263	-272.0	-17.72	-60.89	-70.67
BPI	995	-72.0	-6.75	-17.9	-49.05
BSI	959	-15.0	-1.54	-5.89	-34.45
BHSI	618	-26.0	-4.04	-9.78	-31.56



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	921	-22.0	-2.33	3.48	-15.5
BCTI	661	36.0	5.76	38.57	-26.39
BLNG	2400	-110.0	-4.38	-16.08	-80.36
BLPG	5155	1056.0	25.76	19.97	-55.99



第四部分 运力分布 SUPPLY DISTRIBUTION

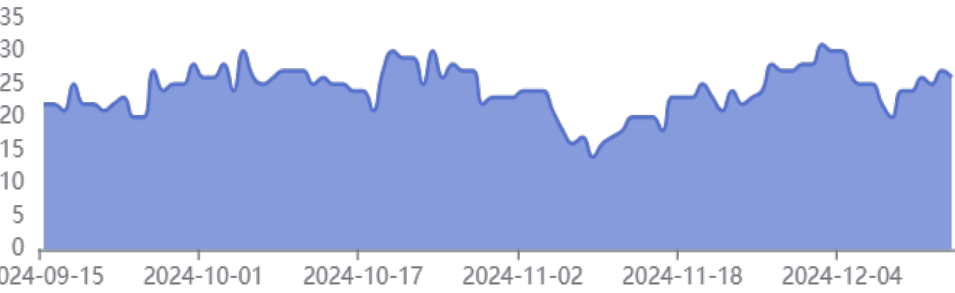


好望角型散货船 Capesize

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.

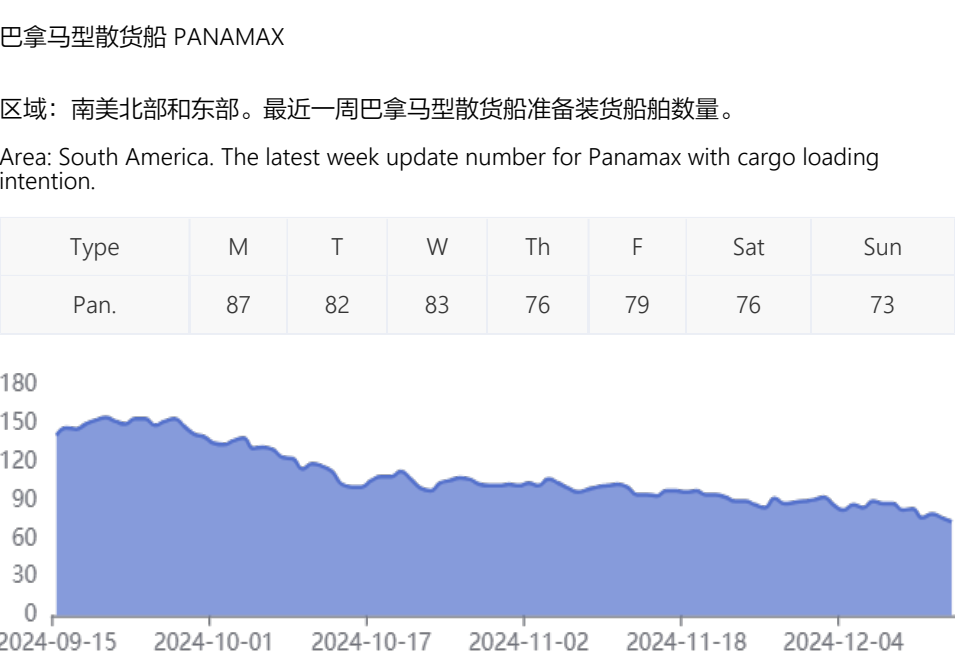
Type	M	T	W	Th	F	Sat	Sun
Cape	20	24	24	26	25	27	26



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.

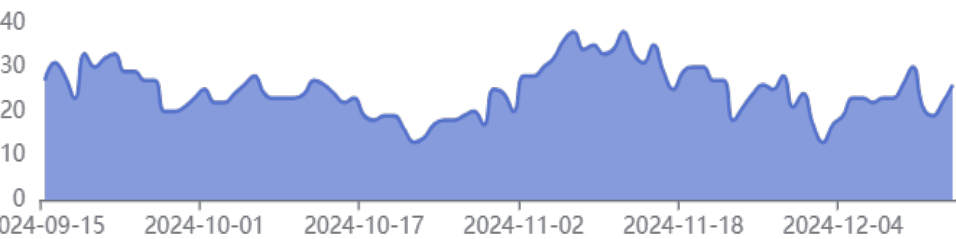
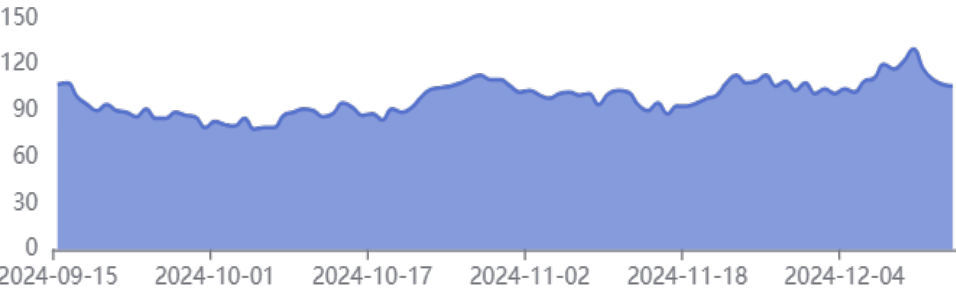
Type	M	T	W	Th	F	Sat	Sun
Cape	23	26	30	21	19	22	26



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	117	122	130	117	110	107	106

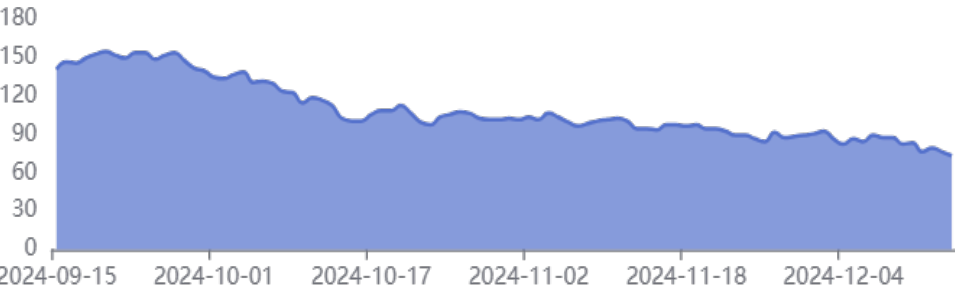


巴拿马型散货船 PANAMAX

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.

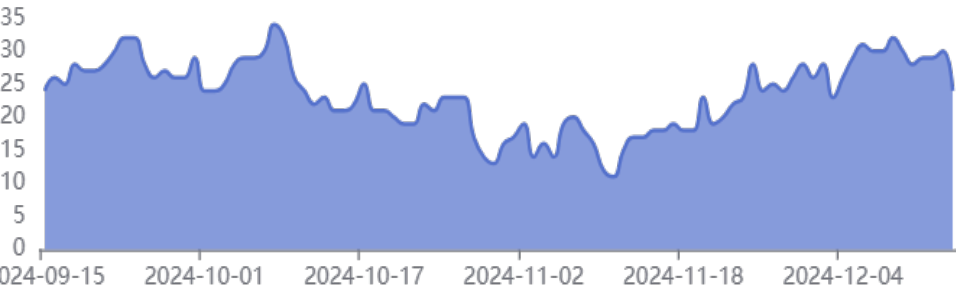
Type	M	T	W	Th	F	Sat	Sun
Pan.	87	82	83	76	79	76	73



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.

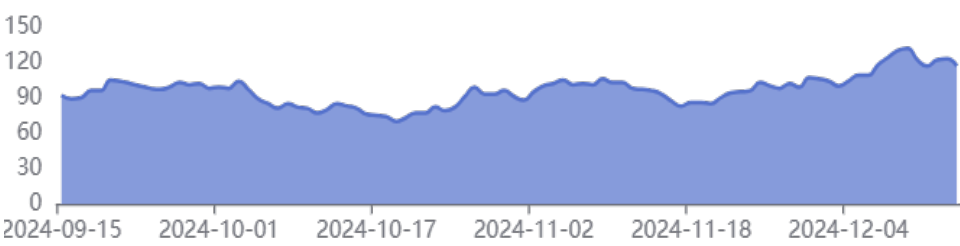
Type	M	T	W	Th	F	Sat	Sun
Pan.	19	20	19	20	20	16	15



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.	130	132	122	117	122	123	117

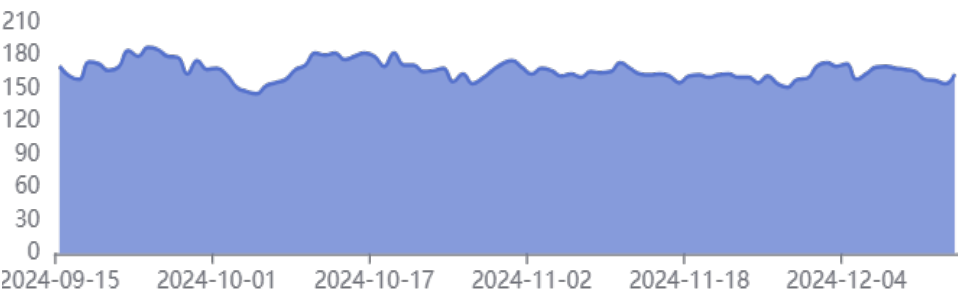


超大灵便型散货 SUPRAMAX

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.

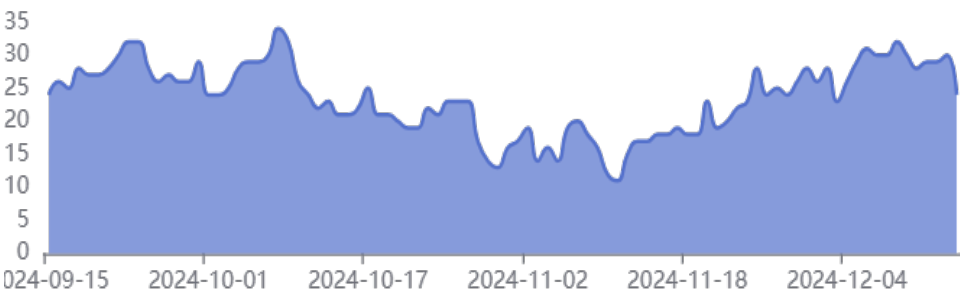
Type	M	T	W	Th	F	Sat	Sun
SMX	168	167	165	158	157	154	163



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.

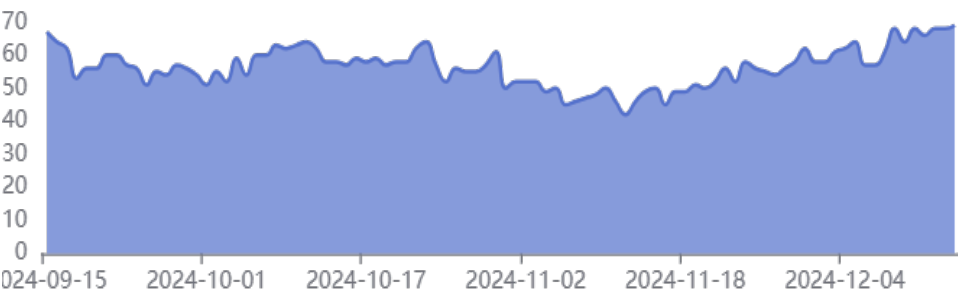
Type	M	T	W	Th	F	Sat	Sun
SMX	32	30	28	29	29	30	24



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.

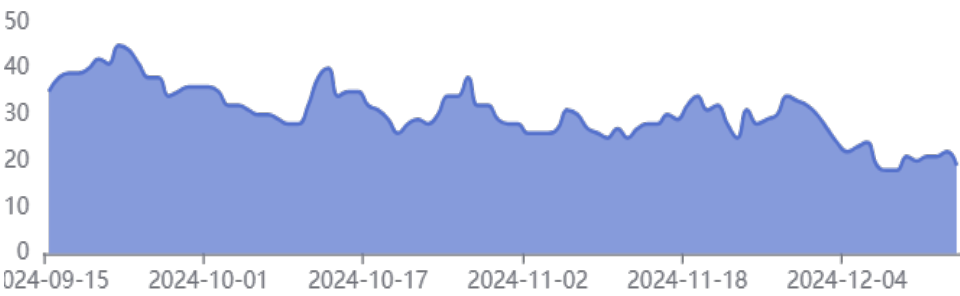
Type	M	T	W	Th	F	Sat	Sun
SMX	18	21	20	21	21	22	19



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.

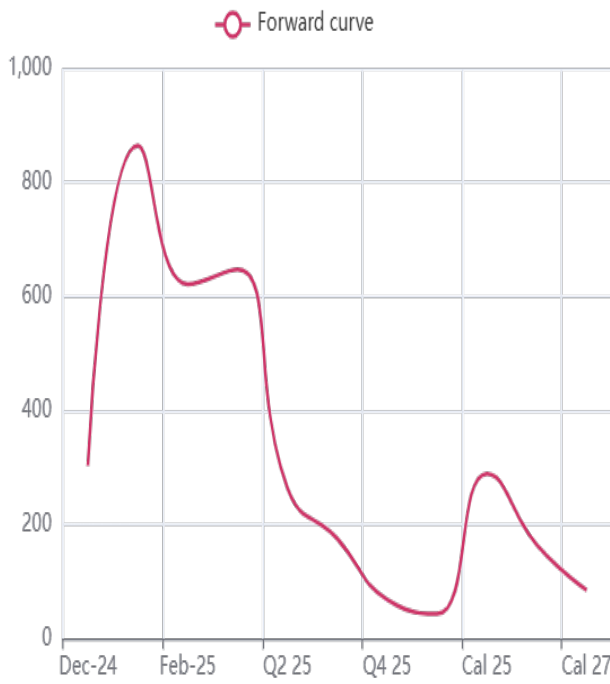
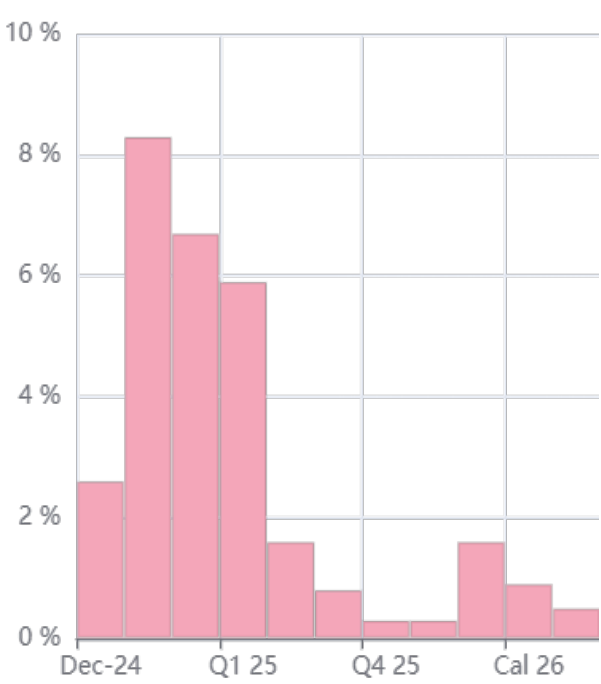
Type	M	T	W	Th	F	Sat	Sun
SMX	68	64	68	66	68	68	69



第五部分 远期运价协议 FFA

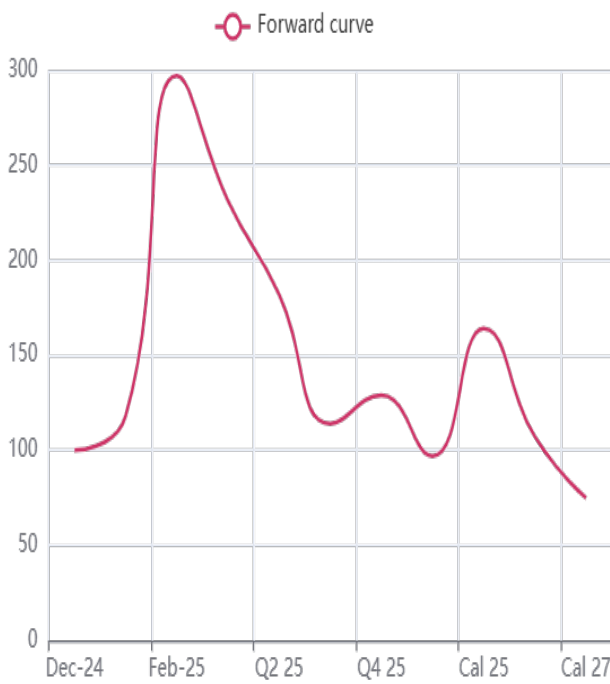
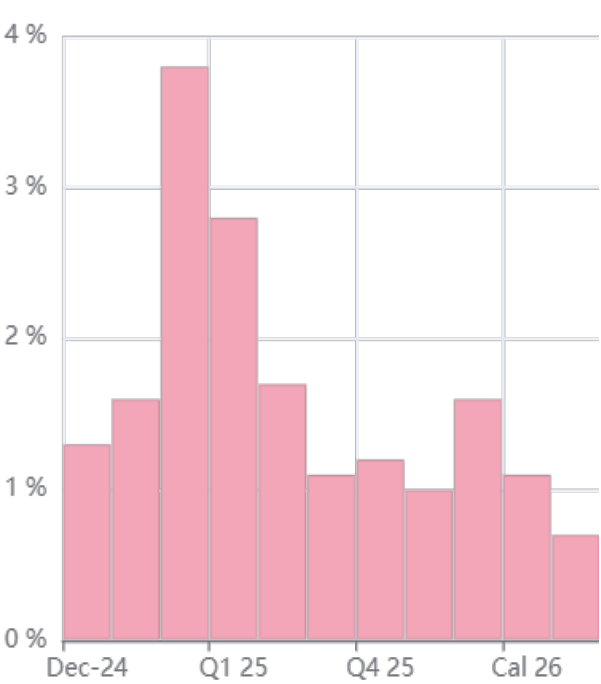
好望角型散货船Capesize

5TC	\$/day	WoW	
Dec-24	12,039.00	303.0	2.6 %
Jan-25	11,243.00	864.0	8.3 %
Feb-25	9,821.00	621.0	6.7 %
Q1 25	11,576.00	647.33	5.9 %
Q2 25	17,075.00	264.0	1.6 %
Q3 25	21,329.00	175.0	0.8 %
Q4 25	22,093.00	68.0	0.3 %
Q1 26	12,929.00	43.0	0.3 %
Cal 25	18,018.25	288.58	1.6 %
Cal 26	17,949.75	164.0	0.9 %
Cal 27	18,171.00	85.0	0.5 %



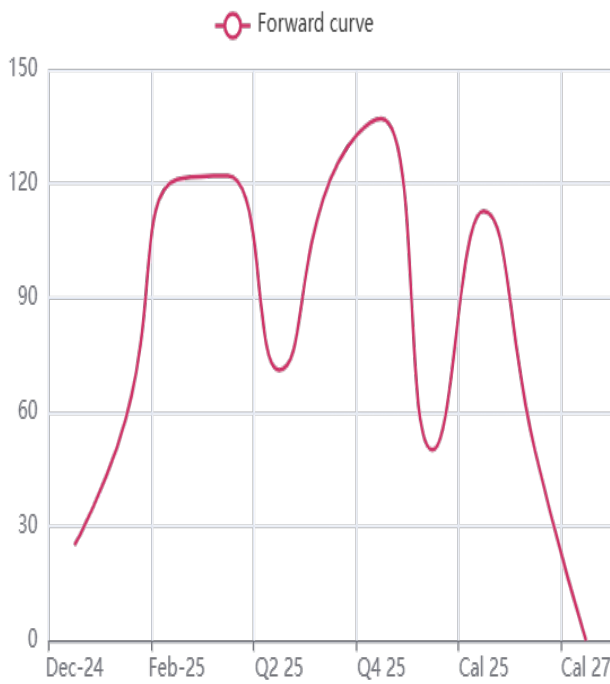
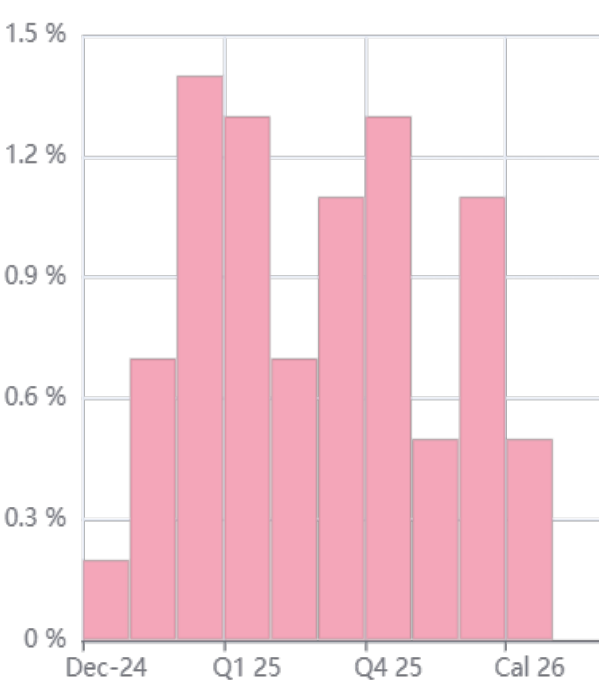
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Dec-24	7,754.00	100.0	1.3 %
Jan-25	7,400.00	118.0	1.6 %
Feb-25	8,086.00	297.0	3.8 %
Q1 25	8,574.00	231.33	2.8 %
Q2 25	10,818.00	182.0	1.7 %
Q3 25	10,793.00	114.0	1.1 %
Q4 25	10,604.00	129.0	1.2 %
Q1 26	9,729.00	97.0	1.0 %
Cal 25	10,197.25	164.08	1.6 %
Cal 26	10,018.00	107.25	1.1 %
Cal 27	10,361.00	75.0	0.7 %



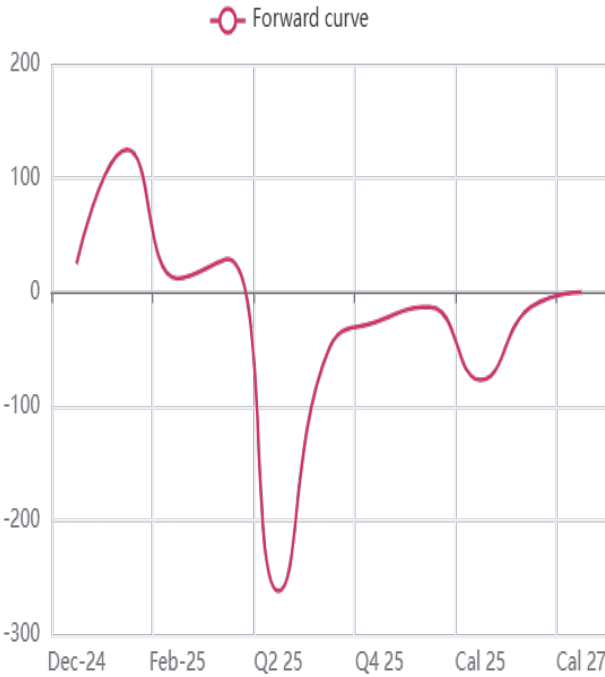
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Dec-24	10,033.00	25.0	0.2 %
Jan-25	8,908.00	58.0	0.7 %
Feb-25	8,754.00	121.0	1.4 %
Q1 25	9,505.33	122.0	1.3 %
Q2 25	10,913.00	71.0	0.7 %
Q3 25	11,221.00	121.0	1.1 %
Q4 25	11,079.00	137.0	1.3 %
Q1 26	10,508.00	50.0	0.5 %
10,679.58	Cal 25	112.75	1.1 %
Cal 26	10,508.00	50.0	0.5 %
Cal 27	10,775.00	0.0	0.0 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Dec-24	11,238.00	25.0	0.2 %
Jan-25	10,188.00	125.0	1.2 %
Feb-25	9,050.00	12.0	0.1 %
Q1 25	9,900.33	29.0	0.3 %
Q2 25	10,513.00	-262.0	-2.4 %
Q3 25	10,788.00	-50.0	-0.5 %
Q4 25	10,650.00	-25.0	-25.0
Q1 26	10,025.00	-13.0	-0.1 %
Cal 25	10,462.83	-77.0	-0.7 %
Cal 26	10,025.00	-13.0	-0.1 %
Cal 27	10,588.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	571.0	461.0	687.0	110.0	17.0	18.28	0.0
Singapore	542.5	451.0	661.5	91.5	-9.5	-9.41	-14.08
Rotterdam	503.5	442.0	644.0	61.5	-4.0	-6.11	44.71
Fujairah	538.5	439.5	656.5	99.0	-5.0	-4.81	1.02
Houston	536.5	440.0	744.5	96.5	-4.5	-4.46	-18.57

(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	200.0		1.0	0.5	-1.48	-11.79
Maize	223.0		2.0	0.9	-1.33	-4.35
Soybeans	206.0		-3.0	-1.44	-5.5	-19.29
Rice	213.0		0.0	0.0	-0.47	-15.93
Barley	220.0		5.0	2.33	1.85	-1.53
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	68.05	-0.16	-0.23	0.13	-6.76
Brent	USD/Bbl	71.85	-0.16	-0.22	0.28	-7.61
Natural Gas	USD/MMBtu	3.17	-0.03	-0.94	7.82	17.41
Gasoline	USD/Gal	1.94	0.02	1.04	-1.02	-7.62
Heating Oil	USD/Gal	2.17	-0.01	-0.46	-0.91	-17.8
Ethanol	USD/Gal	1.56	0.03	1.96	-1.27	-13.33
Naphtha	USD/T	601.89	-21.25	-3.41	-4.11	-4.74
Propane	USD/Gal	0.77	-0.04	-4.94	-3.75	8.45
Uranium	USD/Lbs	77.1	-0.7	-0.9	0.72	-4.81
Methanol	CNY/T	2555.0	26.0	1.03	3.57	4.2
TTF Gas	EUR/MWh	44.62	-3.92	-8.08	1.43	6.19
UK Gas	GBp/thm	110.87	-10.93	-8.97	-0.1	4.48
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.19	0.12	2.95	-0.71	9.4
Coal	USD/T	133.25	-2.75	-2.02	-6.33	-0.19
Steel	CNY/T	3320.0	-20.0	-0.6	2.53	-14.81
Iron Ore	USD/T	104.11	-1.21	-1.15	0.28	-21.72
Aluminum	USD/T	2584.5	-3.0	-0.12	0.86	17.45
Lithium	CNY/T	76650.0	-1750.0	-2.23	5.72	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2669.42	29.3	1.11	1.79	29.11
Silver	USD/t.oz	31.88	1.27	4.15	4.11	26.66
Platium	null	935.5	-7.0	-0.74	-2.22	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.06		0.01	0.95	0.0	-2.75
USD/CNY	7.25		-0.05	-0.68	0.14	1.54

第八部分 本周话题 WEEKLY TOPIC



巴西干旱造成粮食出口减少，巴拿马型散货船区域分布发生明显变化

HiFleet航运大数据曾经报道2023年巴西对中国粮食出口在2022年的基础上增加了28%，这主要因为当年密西西比河的严重干旱，造成区域粮食出口的变化。巴西的粮食作物主要是大豆，其种植分布在马托格罗索州（26%）、巴拉那州（15%）、南里奥格兰德州（14%）、戈亚斯州（10%）、南马托格罗索州（8%）。

然而2024年又有新的变化，2024年9月关于巴西干旱的报道不断，因为随着大豆种植季的临近，贸易商比较关心干旱是否会影响巴西大豆种植进度从而影响其区域产量。2024年巴西进入7月以来，巴西约16个州和巴西利亚联邦区面临44年以来最严重的旱情，部分地区干旱已持续了12个月。而巴西亚马孙州则更发布了通告，称其州内62个城市已有20个因长期干旱发布紧急状态。

2024年巴西有史以来严重的干旱抑制了其地区粮食出口，航运市场巴拿马型散货船航线桑托斯至青岛航线巴拿马型散货船数量和运价都明显下滑。根据HiFleet航运大数据显示，9月中旬在南美北部和东部巴拿马型散货船等待装载粮食船舶还有153艘，最近一季度等待装货的巴拿马型散货船舶一直在减少，目前已经不足90艘意图装载粮食的巴拿马型散货船舶，下滑超过46%。大数据显示更多谷物运输航次转移到了澳大利亚，前往澳大利亚的巴拿马型散货船从9月不到90艘增加到目前的120多艘，增长了39%的运力。这些数据可以通过HiFleet航运大数据平台查看到，该平台社区中的HiFleet周报也能清楚看到这些运力分布的变化趋势。目前巴西港口的粮食依然在出口，但因为其区域干旱减产的原因，桑托斯至青岛航线上以6万吨为基准的粮食运输量已从10月份的每吨38美元大幅下降至11月份的

的每吨33美元，环比下降13%。

航运市场的变化可以通过运力分布变化趋势查看端倪，简单说就如同蜜蜂总愿意去花多的地方采蜜一般，当运力蜂拥而至说明那里的市场比较有利于船东，反之，当运力逐渐减少，说明那里的市场正在发生下滑趋势，越来越多的船东不愿意前往。

HiFleet has reported that Brazil's grain exports to China in 2023 increased by 28% on the basis of 2022, mainly because of the severe drought in the Mississippi River that year, resulting in changes in regional grain exports. Brazil's main food crop is soybeans, which are grown in the states of Mato Grosso (26%), Parana (15%), Rio Grande do Sul (14%), Goias (10%), Mato Grosso do Sul (8%).

However, there are new changes in 2024, and there are constant reports of drought in Brazil in September 2024, because as the soybean planting season approaches, traders are concerned about whether the drought will affect the progress of soybean planting in Brazil and thus affect its regional production. As Brazil enters July 2024, some 16 Brazilian states and the Federal District of Brasilia are facing the worst drought in 44 years, and the drought has lasted for 12 months in some areas. Brazil's Amazonas state issued a notice, saying that 20 of its 62 cities have declared a state of emergency due to the prolonged drought.

In 2024, the worst drought in Brazil's history inhibited its regional grain exports, and the shipping market Panamax bulk carrier route Santos to Qingdao route Panamax bulk carrier quantity and freight rates declined significantly. According to HiFleet shipping data show that in mid-September in the north and east of South America Panamax bulk carriers waiting to load grain ships there are 153 ships, the latest quarter waiting to load Panamax bulk cargo ships have been decreasing, there are less than 90 Panamax bulk cargo ships intended to load grain, down more than 46%. Big Data shows that more grain shipments are moving to Australia, with Panamax bulk carriers to Australia increasing from less than 90 in September to more than 120 now, a 39 percent increase in capacity. These data can be viewed through the HiFleet shipping big Data platform, and the HiFleet weekly report in the platform community can clearly see these trends in the distribution of capacity. At present, the Brazilian port of grain is still exported, but because of the regional drought production, the grain transport volume of 60,000 tons on the Santos-Qingdao route has dropped sharply from \$38 per ton in October to \$33 per ton in November, down 13% from the previous month.

Changes in the shipping market can be seen through the trend of the distribution of shipping capacity. Simply put, it is just like bees are always willing to go to places with more flowers to collect honey. When the shipping capacity swarms, it indicates that the market there is more favorable to shipowners; on the contrary, when the shipping capacity gradually decreases, it indicates that the market there is declining and more and more shipowners are unwilling to go there.