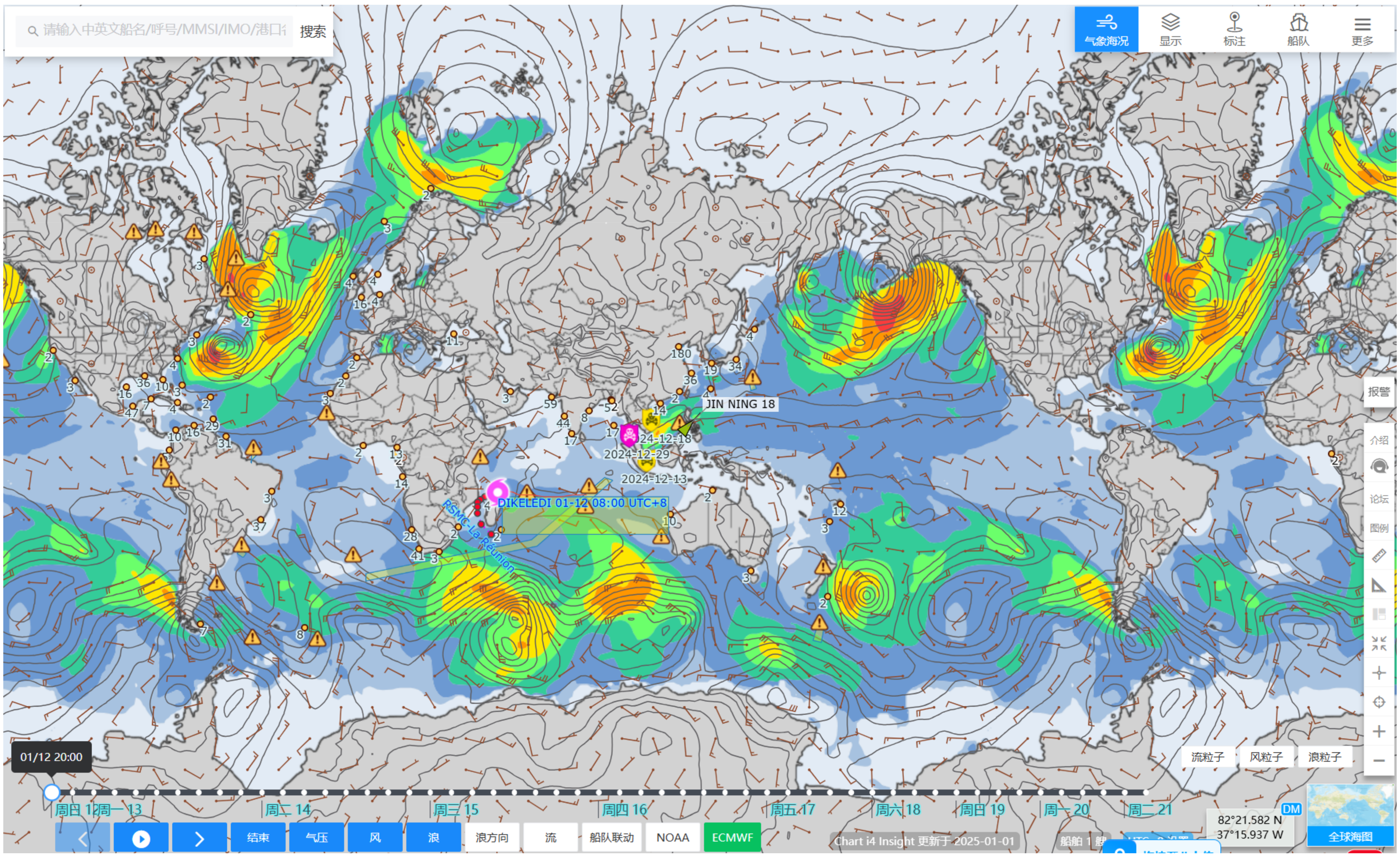
2025年
第2周市场周报

Contents

上海迈利船舶科技有限公司

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977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 977 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，轻浪；黄海风力4-5级，有中浪；东海风力4-6级，上半周减弱，后半周增强，有时大浪；台湾海峡5-7级风，上半周减弱，后半周增强，台湾海峡有时巨浪；南海大部海域风力5-7级，相关海域有时巨浪。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 slight sea. Yellow Sea will be fresh with moderate sea. And China East Sea will become weak in the first half week and strong later with rough wave. The wind in the Taiwan Strait will become near gale with very rough sea in the second half of the week. In most of the South China Sea the wind will stay strong with very rough sea occasionally. The low pressure activities become frequent both in North of Pacific and Atlantic.

海盗事件 Piracy

最近一周没有海盗报告。There is no piracy report for the latest week.

海上事件 Marine Incidents

2025年1月10日，美国财政部的一份声明显示，又有183艘油轮、液化天然气运输船和其他船只，以及俄罗斯天然气工业股份公司（Gazprom Neft）和Surgutneftegas石油公司被列入制裁名单。A statement from the US Treasury Department on 10th Jan 2025 reveals 183 more tankers, LNG carriers and other ships have been designated, together with oil companies Gazprom Neft and Surgutneftegas.

其它 Others

没有 Nil

备注 Remark

本报告数据截止时间为2025年1月12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 Jan 12th of 2025; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

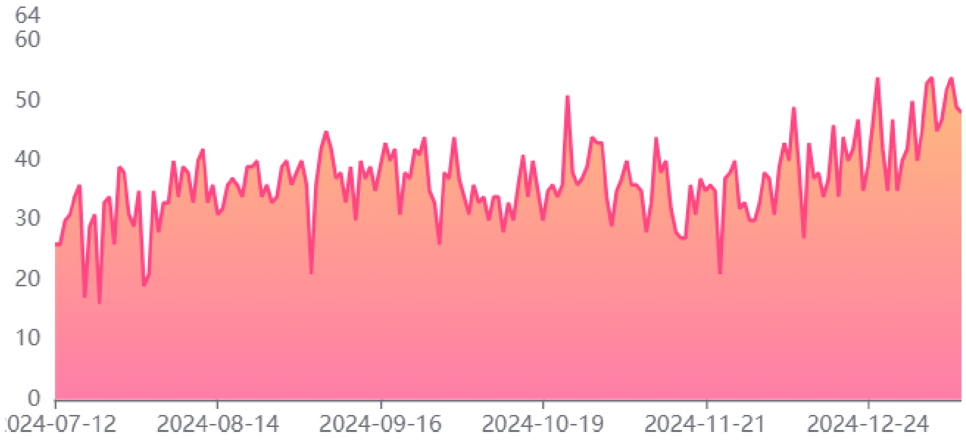
第二部分 航运数据 SHIPPING DATA

最近一周船舶运河/河口锚地等待数量

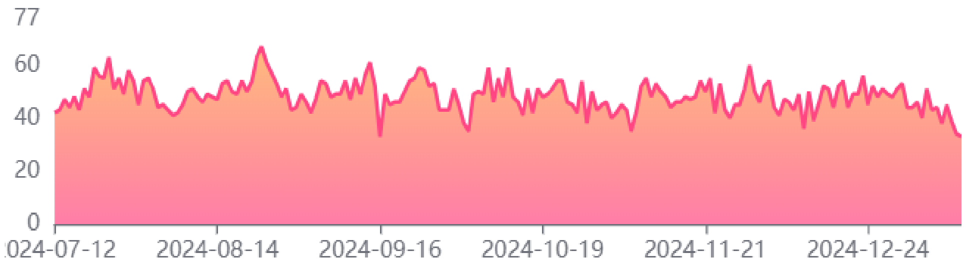
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	33	1349	-50	-26
Miss.Riv.	7	126	5	-26
CJK	167	4518	-18	137
Pa.Atlan.	69	1680	15	-3
Colum.Riv.	4	135	-12	-38
Suez.Med.	48	1276	50	250
Pa.Pac.	54	1771	-67	37
ZJK	83	2722	-5	19

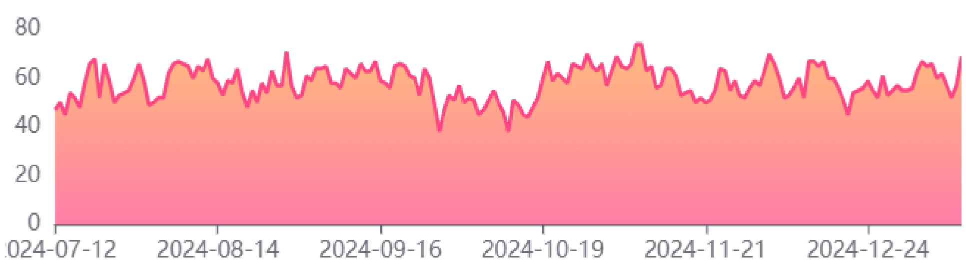
Suez(Mediterranean-Red Sea)



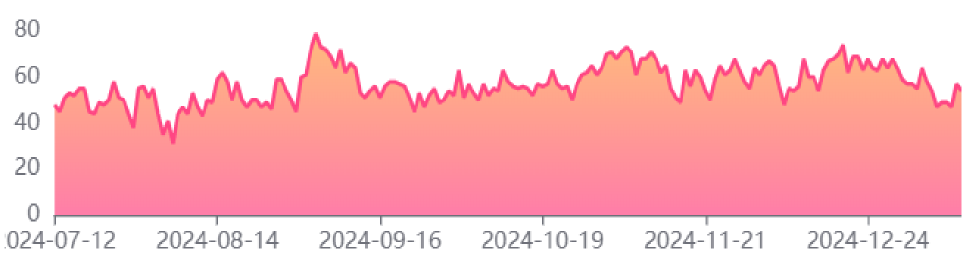
Suez(Red Sea-Mediterranean)



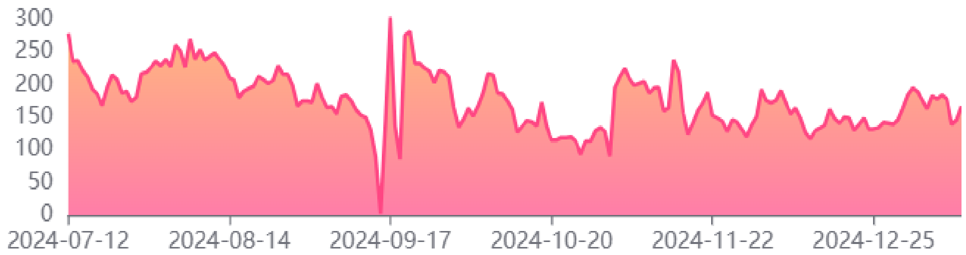
Panama(Atlantic-Pacific)



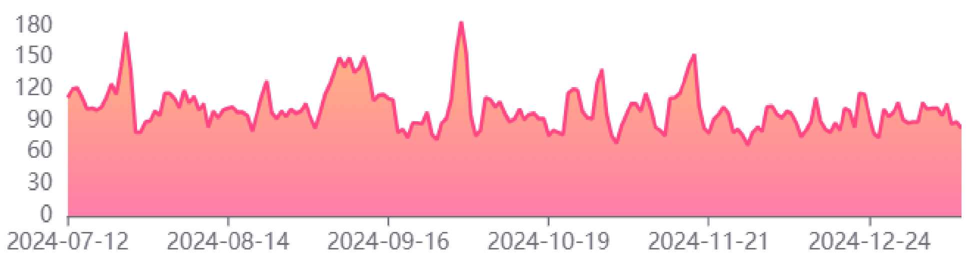
Panama(Pacific-Atlantic)



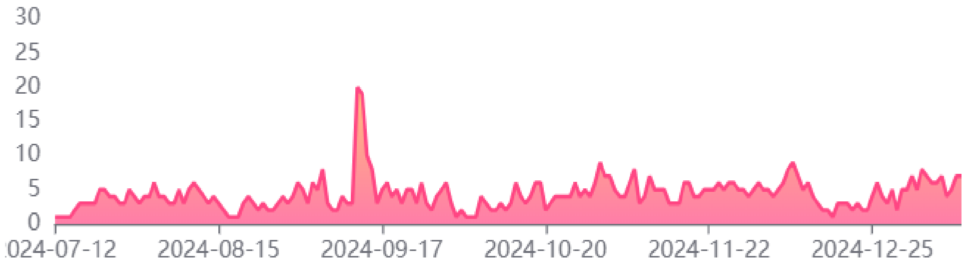
Changjiangkou(Estuary)



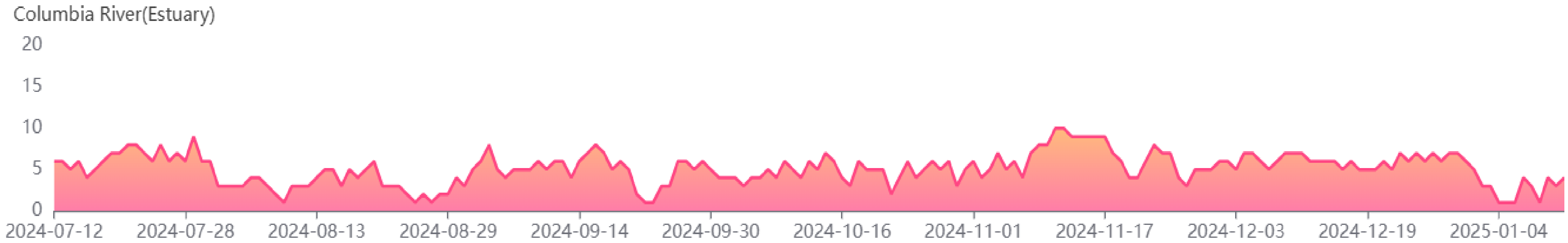
Zhujiangkou(Estuary)



Mississippi River(Estuary)



Columbia River(Estuary)

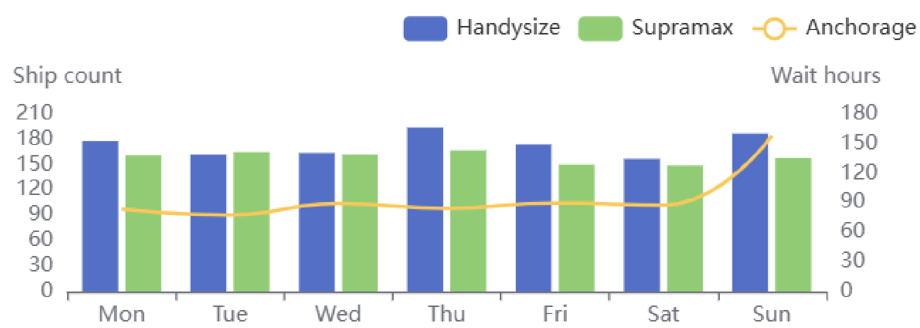


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

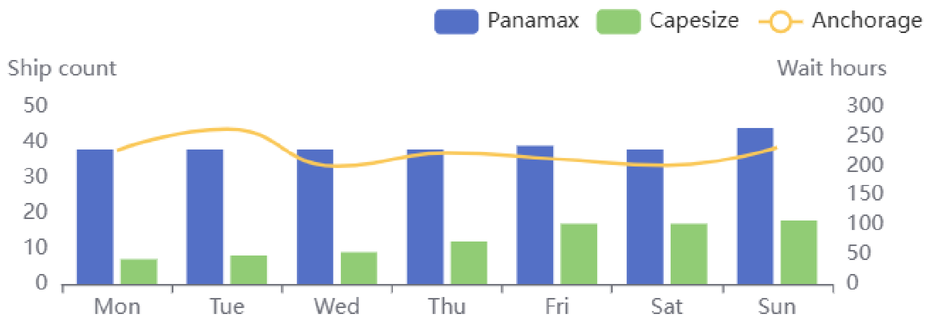
Type	M	T	W	Th	F	Sat	Sun
HDY	178	162	164	194	174	157	187
SMX	161	165	162	167	150	149	158
WT.h.	83.5	77.5	89.3	84.2	89.8	87.5	158



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

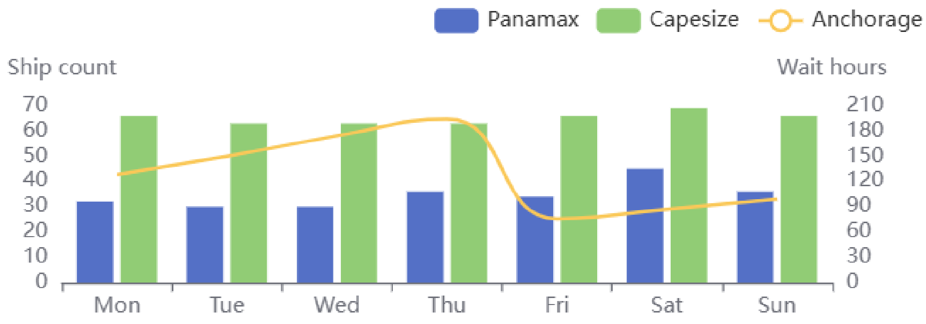
Type	M	T	W	Th	F	Sat	Sun
Pan.	38	38	38	38	39	38	44
Cap	7	8	9	12	17	17	18
WT.h.	226	262.4	199.6	221.85	211.5	201.3	231



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

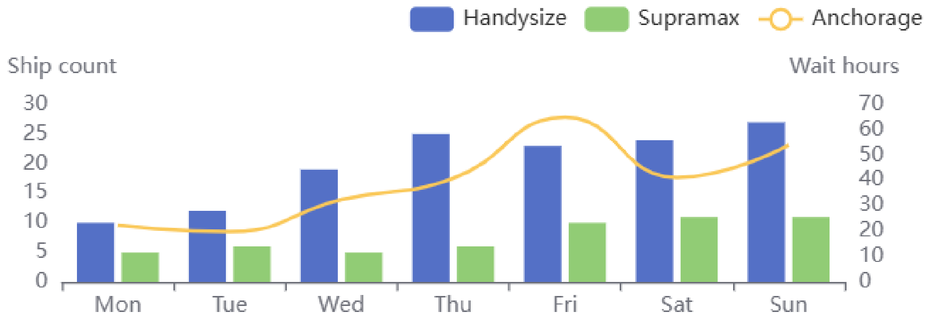
Type	M	T	W	Th	F	Sat	Sun
Pan.	32	30	30	36	34	45	36
Cap	66	63	63	63	66	69	66
WT.h.	128	150.1	174.1	194.2	75.8	87.1	99



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

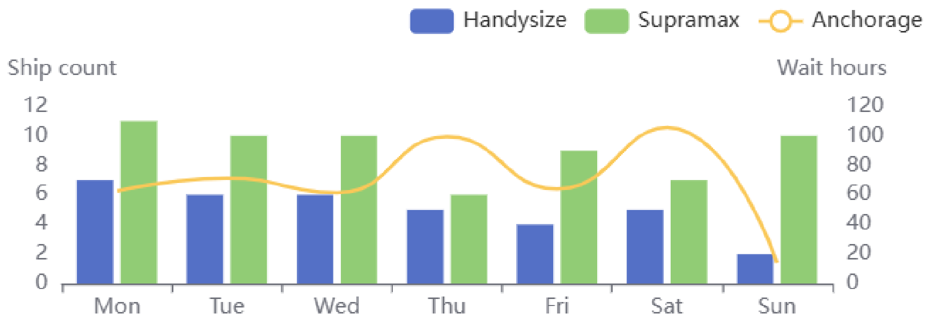
Type	M	T	W	Th	F	Sat	Sun
HDY	10	12	19	25	23	24	27
SMX	5	6	5	6	10	11	11
WT.h.	22.4	19.85	32.45	40.9	64.9	41.2	54



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

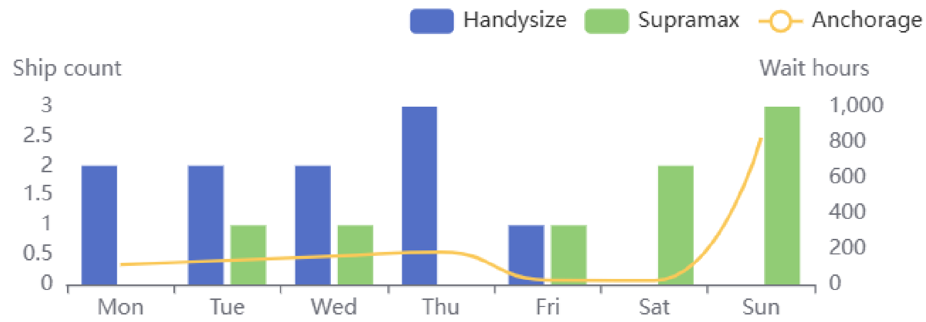
Type	M	T	W	Th	F	Sat	Sun
HDY	7	6	6	5	4	5	2
SMX	11	10	10	6	9	7	10
WT.h.	62.6	71.4	61.4	99.4	64	105.5	14



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

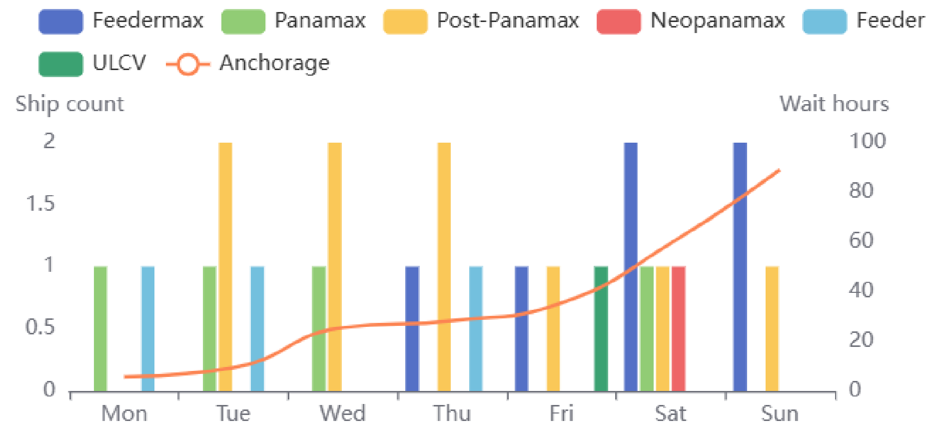
Type	M	T	W	Th	F	Sat	Sun
HDY	2	2	2	3	1	0	0
SMX	0	1	1	0	1	2	3
WT.h.	111	135	159	183	24.3	22.0	824



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

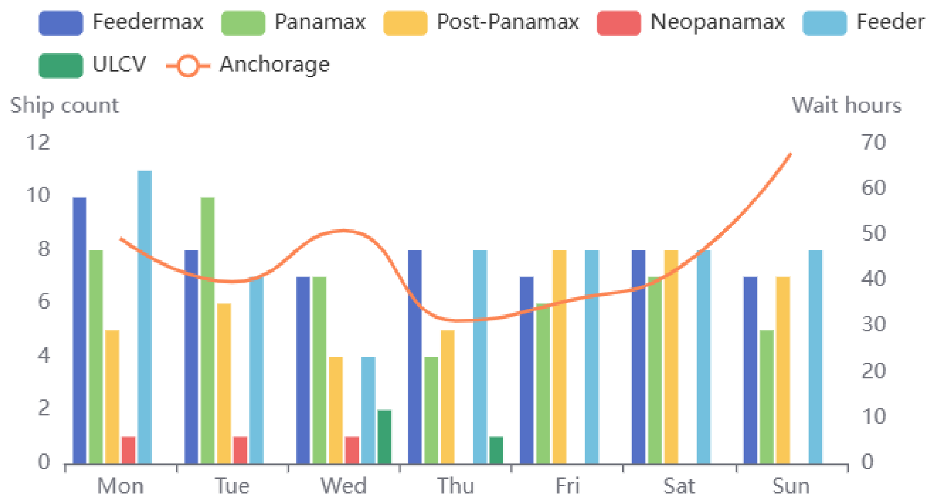
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	1	1	2	2
Pan.	1	1	1	0	0	1	0
PPx	0	2	2	2	1	1	1
NPx	0	0	0	0	0	1	0
Fd	1	1	0	1	0	0	0
WT.h.	5.75	9.4	25.5	28.25	35.4	59.4	89
Ulcv	0	0	0	0	1	0	0



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

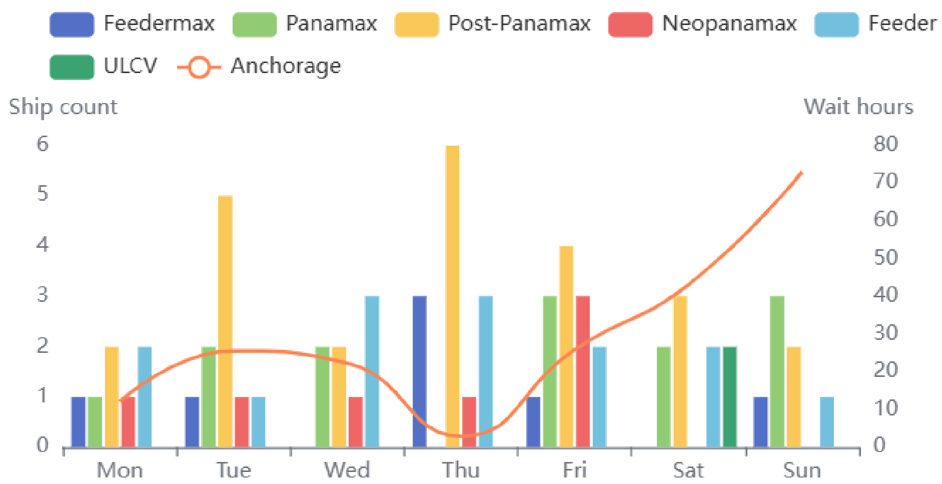
Type	M	T	W	Th	F	Sat	Sun
F.ma.	10	8	7	8	7	8	7
Pan.	8	10	7	4	6	7	5
PPx	5	6	4	5	8	8	7
NPx	1	1	1	0	0	0	0
Fd	11	7	4	8	8	8	8
Ulcv	0	0	2	1	0	0	0
WT.h.	49.3	39.8	51	31.3	35.6	42.9	68



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

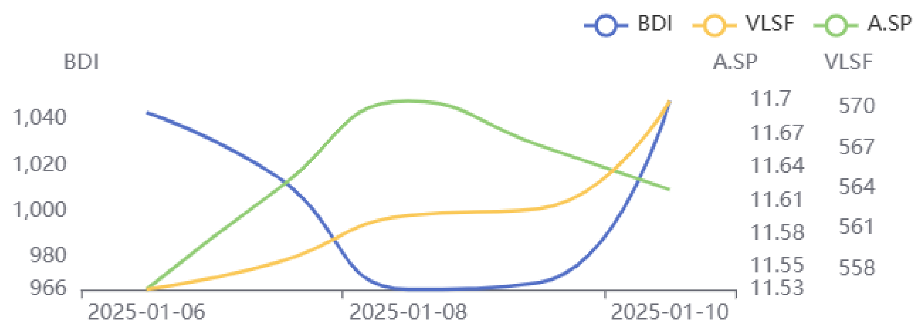
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	1	0	3	1	0	1
Pan.	1	2	2	0	3	2	3
PPx	2	5	2	6	4	3	2
NPx	1	1	1	1	3	0	0
Fd	2	1	3	3	2	2	1
Ulcv	0	0	0	0	0	2	0
WT.h.	12.1	25.55	22.3	2.9	25.9	43.1	73



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

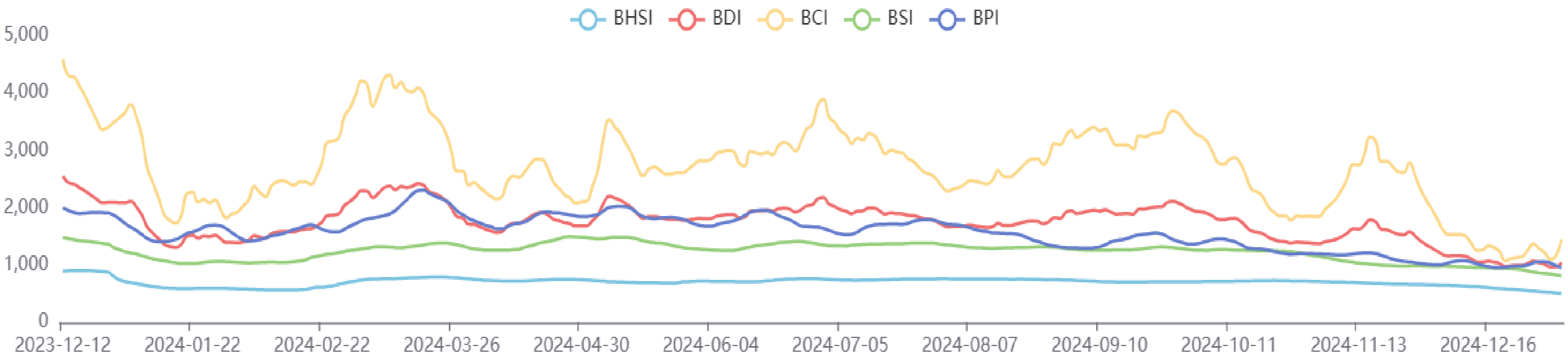
Type	M	T	W	Th	F	Sat	Sun
BDI	867	856	846	836	819		
VLSF	556.50	558.50	562.00	562.50	570.50		
A.SP	11.53	11.62	11.7	11.66	11.62	11.73	



第三部分 航运市场 SHIPPING MARKET

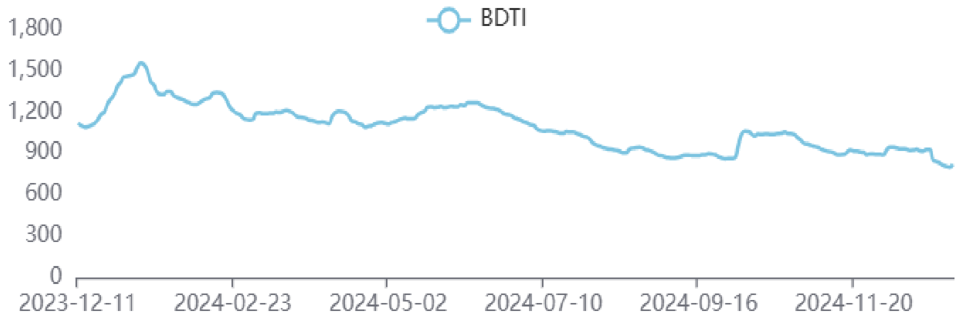
波罗的海干散货指数Baltic Dry Index

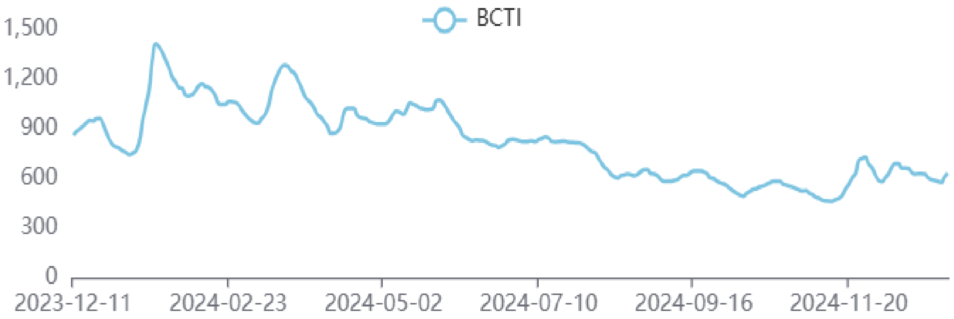
Type	PI	WoW	W%	M%	y%
BDI	1048	-24.0	-2.24	-0.29	-37.02
BCI	1448	73.0	5.31	14.65	-46.29
BPI	953	-87.0	-8.37	-4.22	-34.9
BSI	819	-65.0	-7.35	-14.6	-27.84
BHSI	508	-41.0	-7.47	-17.8	-21.12

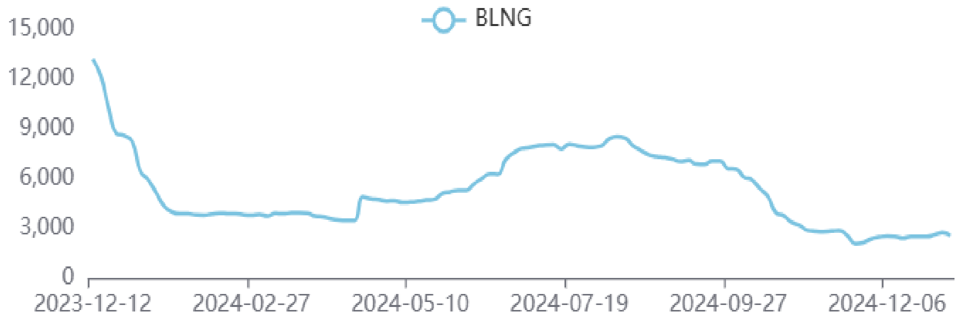


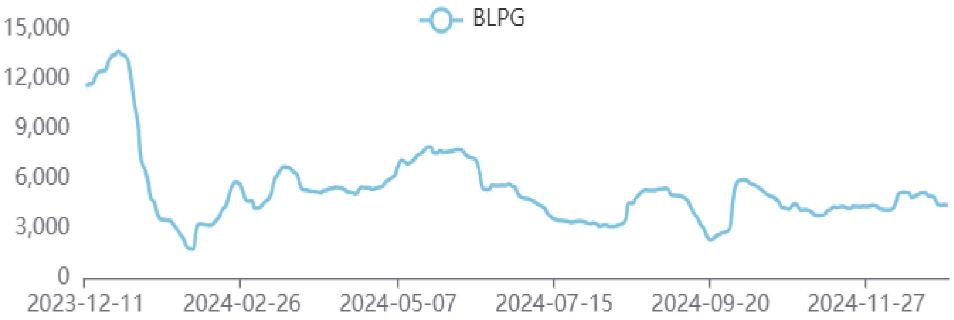
能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	821	-20.0	-2.38	-10.86	-43.65
BCTI	629	38.0	6.43	-4.84	-17.56
BLNG	2541	-62.0	-2.38	5.88	-56.99
BLPG	4381	-560.0	-11.33	-15.01	-57.99

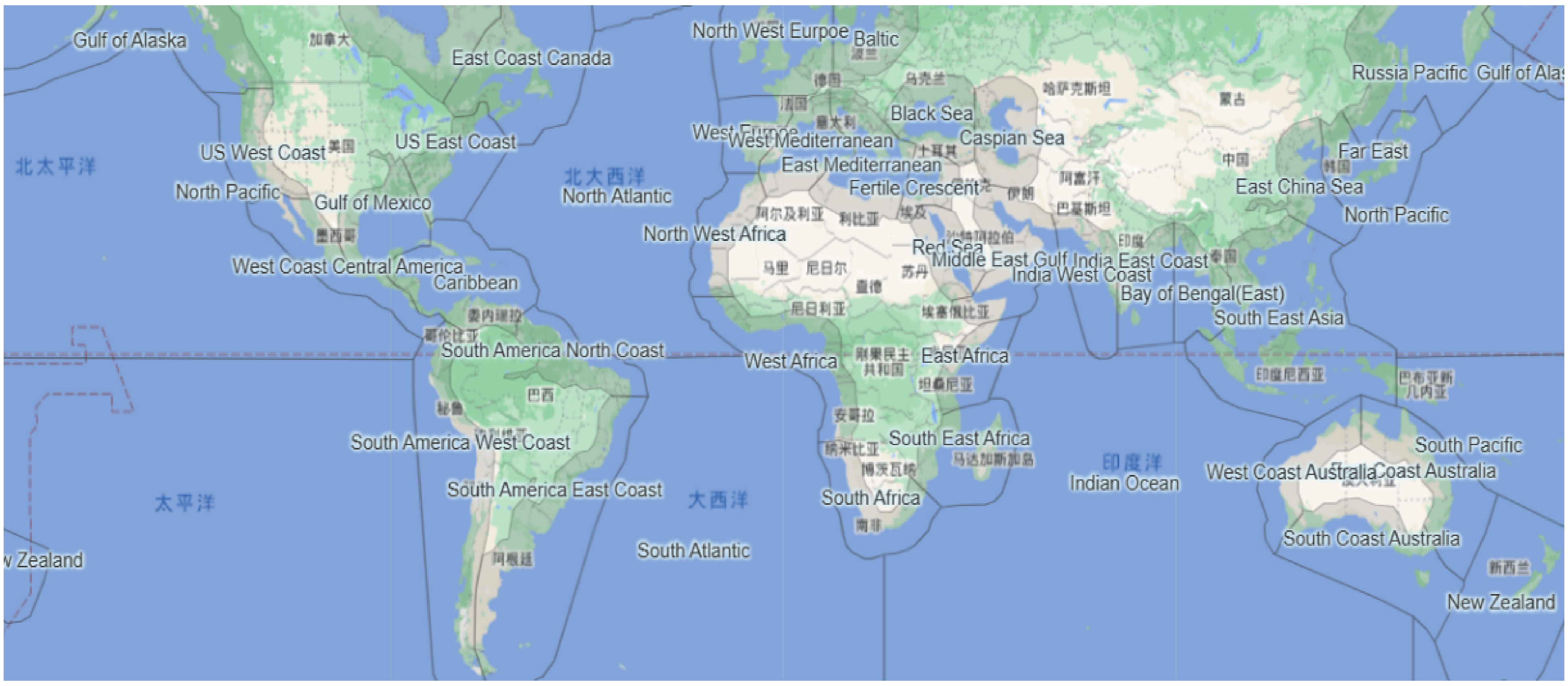








第四部分 运力分布 SUPPLY DISTRIBUTION

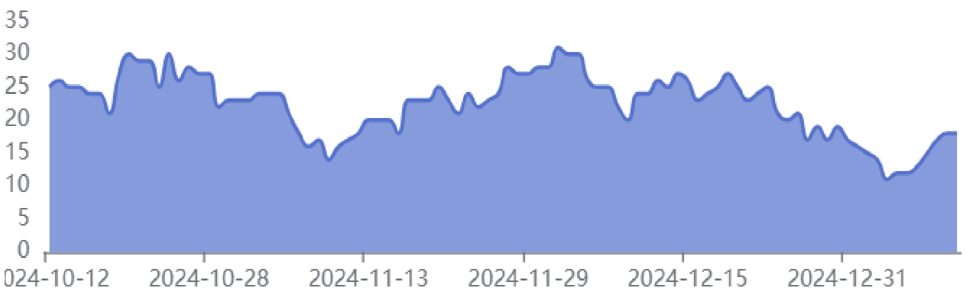


好望角型散货船 Capesize

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.

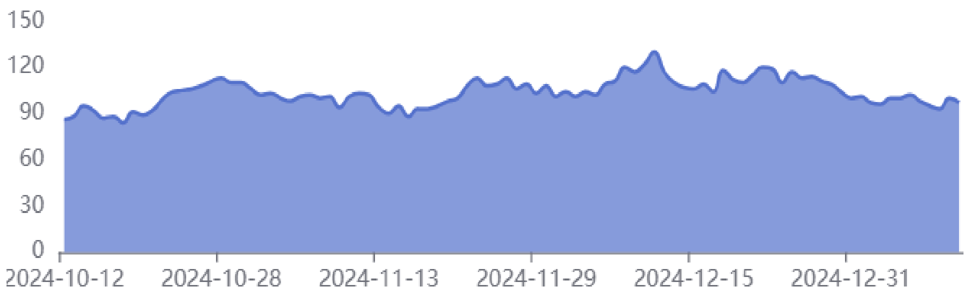
Type	M	T	W	Th	F	Sat	Sun
Cape	12	12	13	15	17	18	18



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.

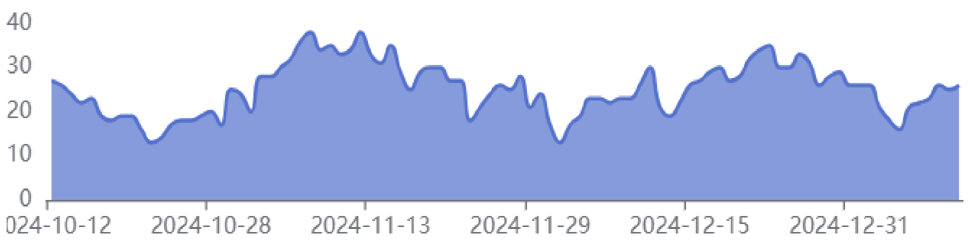
Type	M	T	W	Th	F	Sat	Sun
Cape	100	102	98	95	93	100	97



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	16	21	22	23	26	25	26

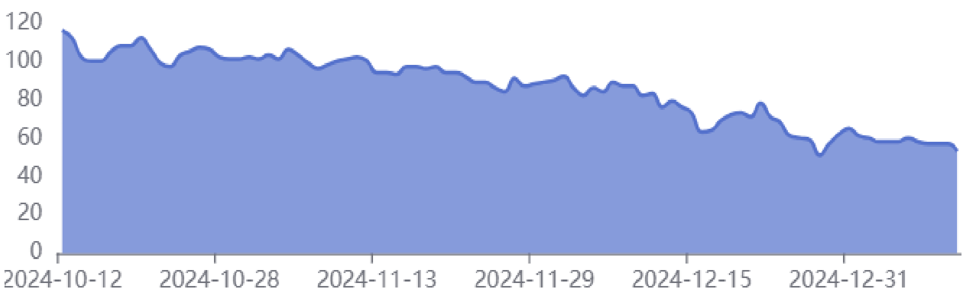


巴拿马型散货船 PANAMAX

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.

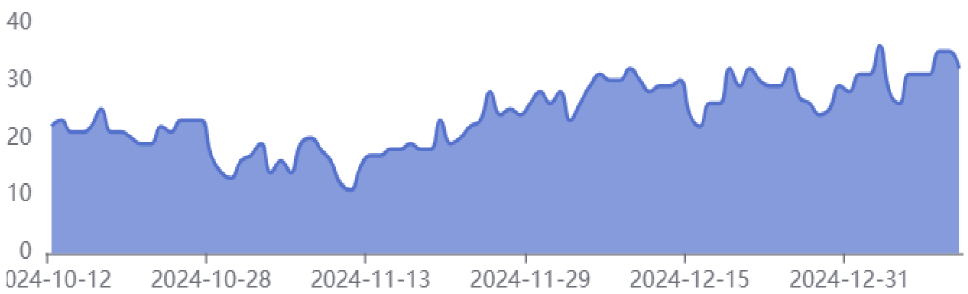
Type	M	T	W	Th	F	Sat	Sun
Pan.	58	60	58	57	57	57	53



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.

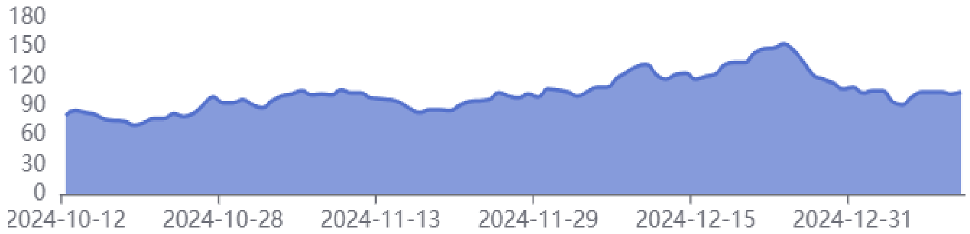
Type	M	T	W	Th	F	Sat	Sun
Pan.	12	13	13	14	18	18	20



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.	91	99	104	104	104	102	104

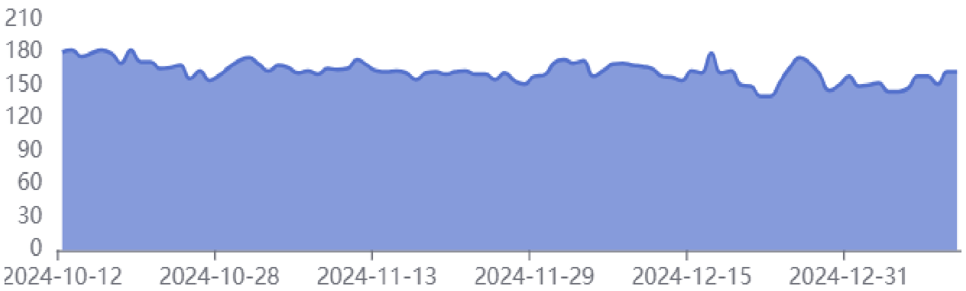


超大灵便型散货 SUPRAMAX

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.

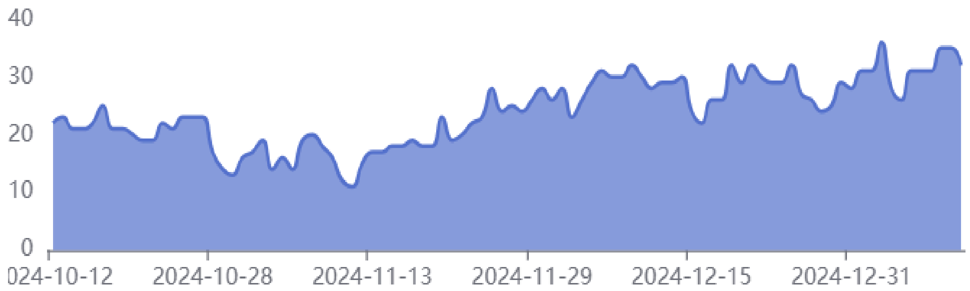
Type	M	T	W	Th	F	Sat	Sun
SMX	144	147	158	158	151	162	162



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.

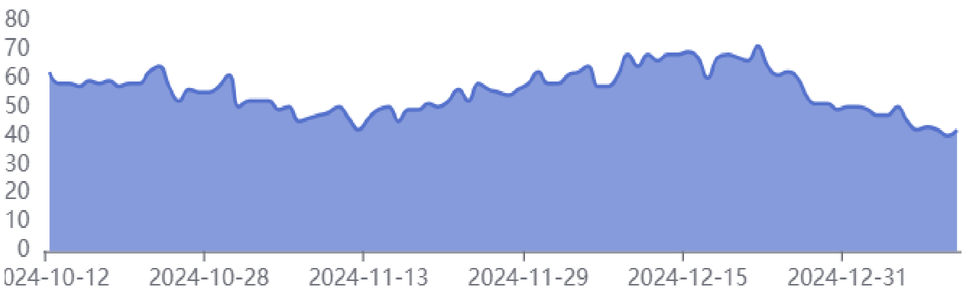
Type	M	T	W	Th	F	Sat	Sun
SMX	26	31	31	31	35	35	32



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.

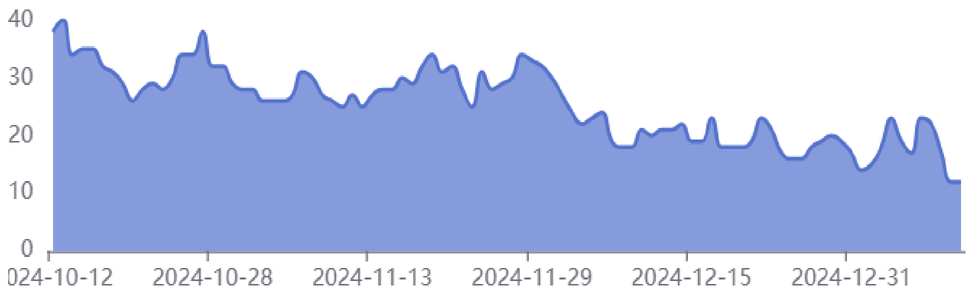
Type	M	T	W	Th	F	Sat	Sun
SMX	19	17	23	22	17	12	12



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.

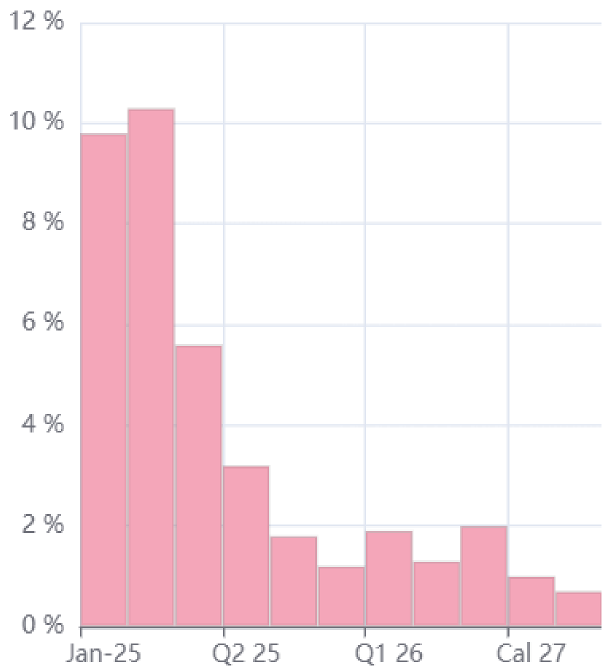
Type	M	T	W	Th	F	Sat	Sun
SMX	50	45	42	43	42	40	42

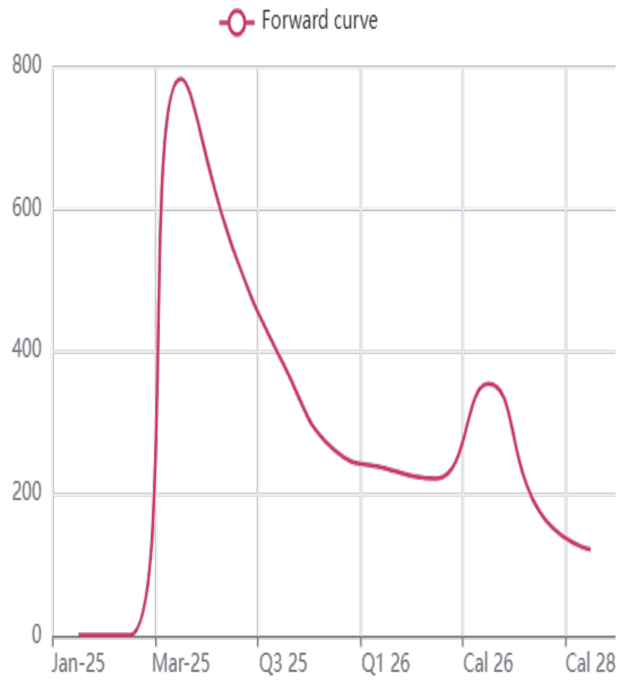


第五部分 远期运价协议 FFA

好望角型散货船Capesize

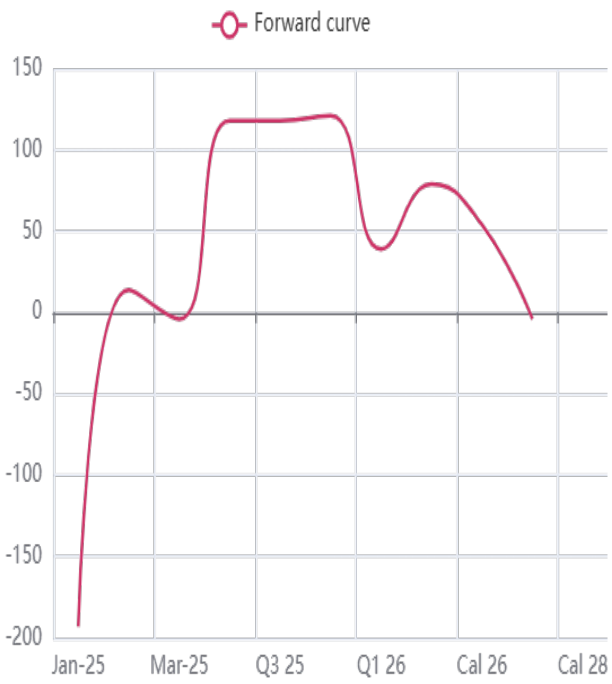
5TC	$/day	WoW	
Jan-25	11,425.00	1021.0	9.8 %
Feb-25	11,061.00	1036.0	10.3 %
Mar-25	14,821.00	782.0	5.6 %
Q2 25	17,499.67	547.33	3.2 %
Q3 25	21,207.00	382.0	1.8 %
Q4 25	22,357.00	261.0	1.2 %
Q1 26	12,671.00	235.0	1.9 %
Q2 26	17,650.00	221.0	1.3 %
Cal 26	18,261.00	354.0	2.0 %
Cal 27	18,368.00	175.0	1.0 %
Cal 28	18,514.00	121.0	0.7 %





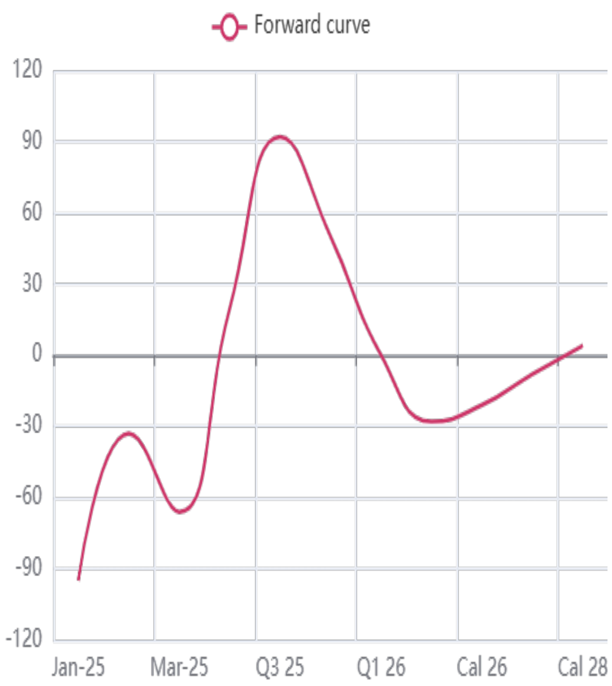
巴拿马型散货船Panamax

4TC	$/day	WoW	
Jan-25	7,136.00	-193.0	-2.6 %
Feb-25	7,296.00	14.0	0.2 %
Mar-25	9,800.00	-4.0	0.0 %
Q2 25	10,869.00	118.0	1.1 %
Q3 25	11,250.00	118.0	1.1 %
Q4 25	10,971.00	121.0	1.1 %
Q1 26	9,796.00	39.0	0.4 %
Q2 26	10,829.00	79.0	0.7 %
Cal 26	10,236.00	54.0	0.5 %
Cal 27	10,382.00	-4.0	0.0 %
Cal 28	-	-	-



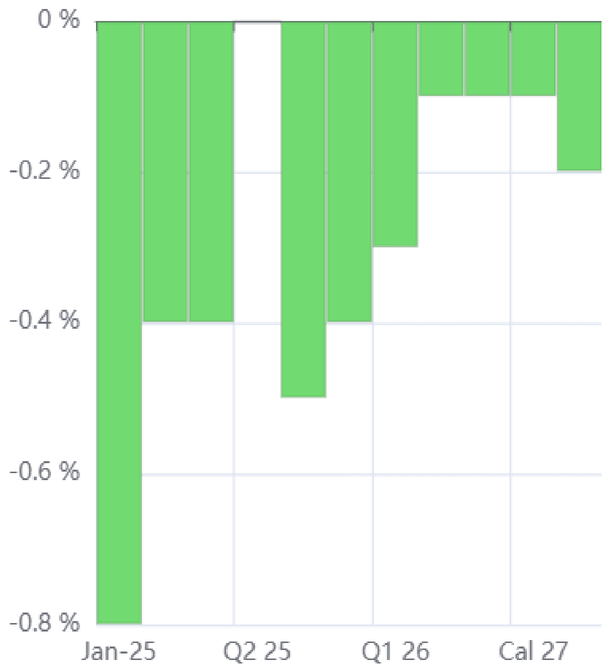
超大灵便型散货船Supramax

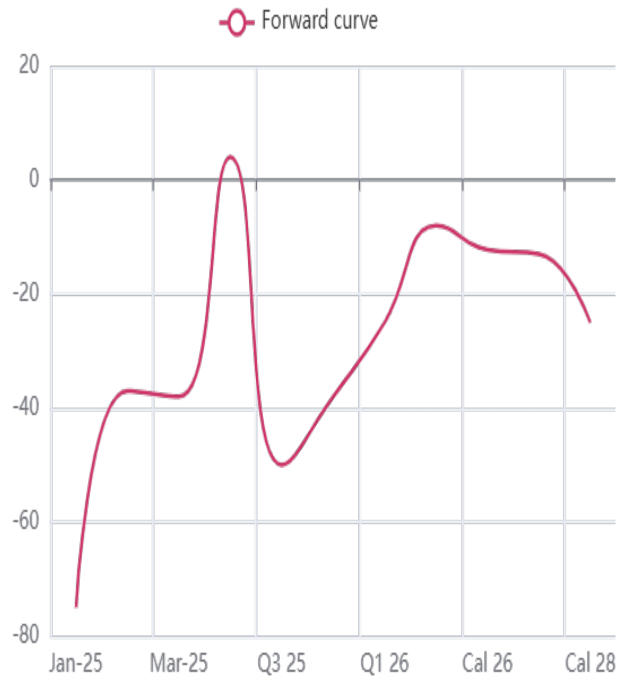
10TC	$/day	WoW	
Jan-25	8,188.00	-95.0	-1.1 %
Feb-25	8,025.00	-33.0	-0.4 %
Mar-25	10,092.00	-66.0	-0.6 %
Q2 25	10,961.00	19.67	0.2 %
Q3 25	11,292.00	92.0	0.8 %
Q4 25	11,075.00	50.0	0.5 %
Q1 26	10,117.00	0.0	0.0 %
Q2 26	10,556.00	-28.0	-0.3 %
10,446.25	Cal 26	-21.0	-0.2 %
Cal 27	10,892.00	-8.0	-0.1 %
Cal 28	11,171.00	4.0	0.0 %



灵便型散货船Handysize

7TC	$/day	WoW	
Jan-25	9,125.00	-75.0	-0.8 %
Feb-25	8,513.00	-37.0	-0.4 %
Mar-25	10,125.00	-38.0	-0.4 %
Q2 25	10,812.67	4.0	0.0 %
Q3 25	11,013.00	-50.0	-0.5 %
Q4 25	10,775.00	-38.0	-0.4 %
Q1 26	9,525.00	-25.0	-25.0
Q2 26	10,209.00	-8.0	-0.1 %
Cal 26	10,038.00	-12.25	-0.1 %
Cal 27	10,550.00	-13.0	-0.1 %
Cal 28	10,913.00	-25.0	-0.2 %

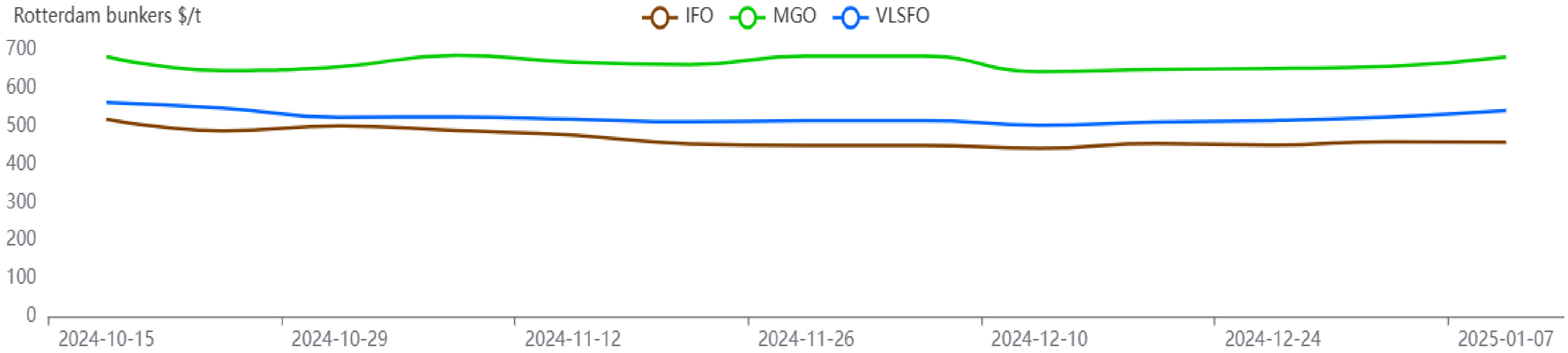


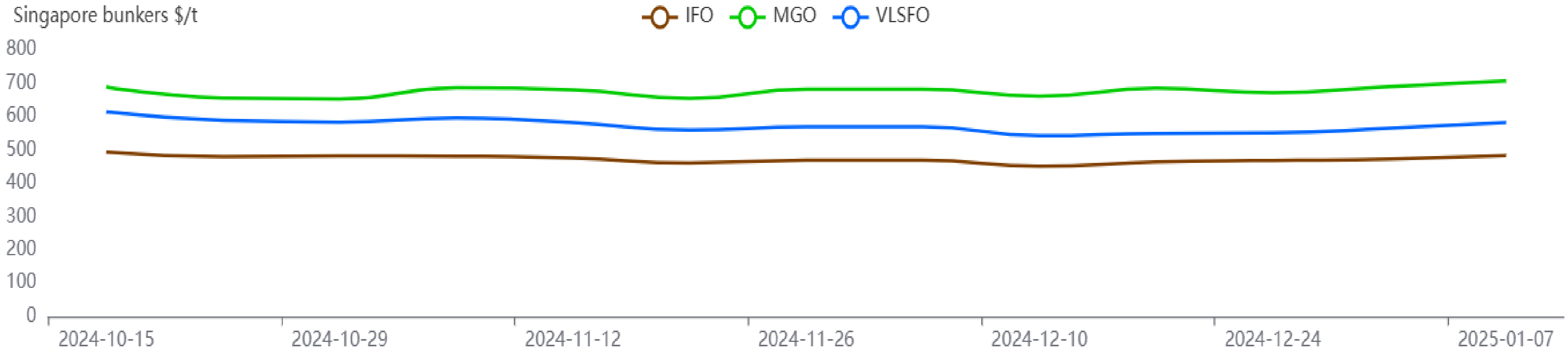


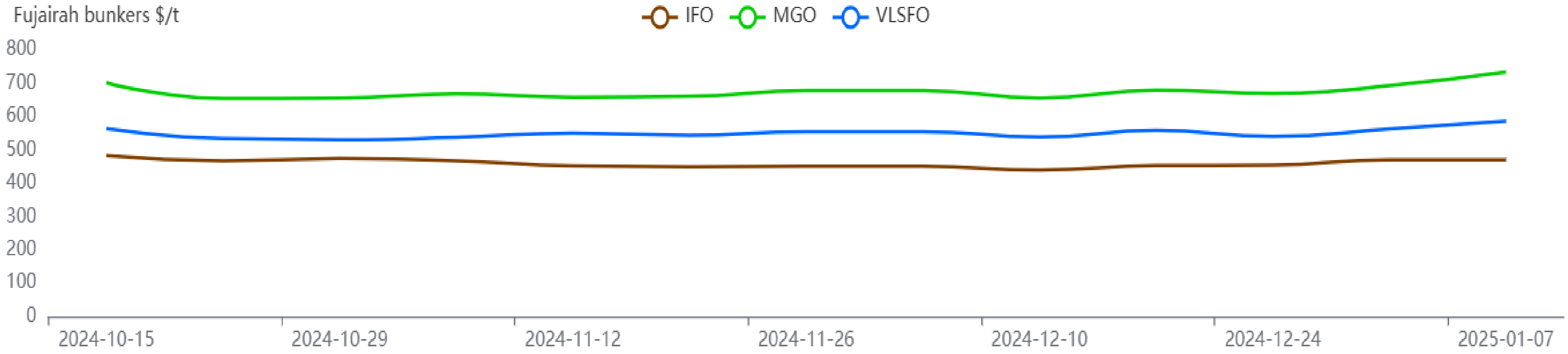
第六部分 燃油价格 BUNKER PRICE

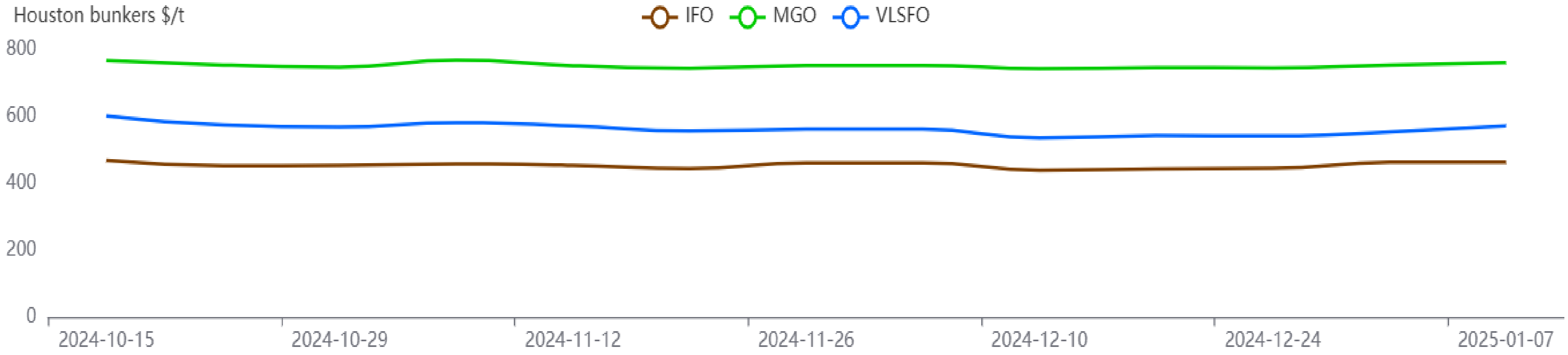
MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	586.5	495.5	720.0	91.0	11.0	13.75	-17.27
Singapore	582.5	483.5	707.0	99.0	6.5	7.03	8.2
Rotterdam	541.0	458.5	682.5	82.5	17.5	26.92	34.15
Fujairah	586.5	470.0	734.0	116.5	24.0	25.95	17.68
Houston	573.0	464.0	762.5	109.0	18.0	19.78	12.95

(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	198.0		-3.0	-1.49	-1.0	-12.0
Maize	228.0		3.0	1.33	2.24	-1.3
Soybeans	201.0		0.0	0.0	-2.43	-21.79
Rice	204.0		-6.0	-2.86	-4.23	-21.84
Barley	222.0		-1.0	-0.45	0.91	-0.45
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	76.57	4.61	6.41	12.52	1.98
Brent	USD/Bbl	79.76	4.91	6.56	11.01	-1.27
Natural Gas	USD/MMBtu	3.99	0.37	10.22	25.87	58.33
Gasoline	USD/Gal	2.07	0.05	2.48	6.7	-4.17
Heating Oil	USD/Gal	2.5	0.19	8.23	15.21	-6.37
Ethanol	USD/Gal	1.68	-0.01	-0.59	7.69	0.6
Naphtha	USD/T	647.48	35.98	5.88	7.57	1.74
Propane	USD/Gal	0.87	0.09	11.54	12.99	29.85
Uranium	USD/Lbs	73.55	0.55	0.75	-4.6	-19.18
Methanol	CNY/T	2657.0	-110.0	-3.98	3.99	8.8
TTF Gas	EUR/MWh	45.44	-3.45	-7.06	1.84	34.24
UK Gas	GBp/thm	113.9	-11.77	-9.37	2.73	25.58
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.31	0.3	7.48	2.86	10.51
Coal	USD/T	115.75	-9.5	-7.58	-13.13	-20.45
Steel	CNY/T	3138.0	-172.0	-5.2	-5.48	-20.68
Iron Ore	USD/T	98.09	-5.52	-5.33	-5.78	-31.16
Aluminum	USD/T	2571.5	3.5	0.14	-0.5	9.43
Lithium	CNY/T	75700.0	650.0	0.87	-1.24	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2685.61	50.85	1.93	0.61	29.91
Silver	USD/t.oz	30.38	1.04	3.54	-4.71	26.27
Platium	null	977.1	75.7	8.4	4.45	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.02		-0.02	-1.92	-3.77	-8.11
USD/CNY	7.36		0.04	0.55	1.52	2.94

第八部分 本周话题 WEEKLY TOPIC

中国海运巨头出现在五角大楼的名单上

2024年第45周市场周报，hiFleet报道了2024年11月6日备受全世界所关注的美国大选终于尘埃落定，共和党特朗普以明显的优势击败了民主党哈里斯获得美国第47任总统，2016年特朗普还击败过希拉里当选美国第45任总统。唐纳德•特朗普（Donald Trump）赢得美国总统大选，开启了他的总统2.0时代。航运界最关心的是特朗普会对世界航运市场产生哪些影响。当时我们按逻辑重点推演了集装箱市场，能源运输市场和红海问题未来发展趋势。美国果然不出意外的坚持以美国为中心出台各种有利于美国航运发展的重大政策，甚至借助采取打压他国航运来快速达到其经济利益诉求，地缘政治一直存在动荡和不确定中。

2025年1月7号，全球最大船东中远海（China Cosco Shipping）因涉嫌与中国军方有关联而成为美国政府的目标，同时石油巨头中海油（CNOOC）也一起出现在美国五角大楼的名单上。在一份提交给《联邦纪事》（Federal Register）的文件中，中国国有企业中远海出现在"军工企业"名单上，这个名单是由五角大楼决定的。

据媒体描述这份名单是一个"黑名单"，但与OFAC的名单有所不同，并不意味着已被列入任何制裁或出口管制名单，不会对相关海运业务和船舶运营产生影响。然而，被列入该名单的目的是阻止美国公司与这些公司有经济往来。可能受此影响，中远海股价在1月7号在香港股市下跌4.4%，跌幅超过香港基准股指。

2019年，中远海因运输伊朗石油而受到美国制裁，导致VLCC运价飙升，但这些制裁在2020年就被取消。市场认为此次五角大楼名单对原油和航运市场的影响将较小，但应该还是会对当前航运市场产生一些向上促进的影响。中远海整体船队规模超过1千艘，涵盖所有主要领域的船舶，包括超大型集装箱船， 散货船，油轮，件杂货船等等，远远领先于排名第二的MSC地中海航运公司（MSC Mediterranean Shipping Co），后者拥有大概770艘船舶。此次名单可能会对集装箱运输市场产生影响，因为北美集装箱进口量约占全球集装箱总量的20%，中国占北美集装箱总量的35%至45%，跨太平洋贸易是中远海最大的集装箱航线。

石油巨头中国海洋石油总公司（CNOOC）和拥有庞大油轮和散货船船队的船东中外运（Sinotrans）也在名单上。根据彭博资讯（Bloomberg Intelligence）的数据，中海油在美国拥有两个陆上页岩油气项目，两个深水项目，并在美国墨西哥湾的其他几个勘探区块拥有权益。该公司在上月底的一份报告中说，与华盛顿日益紧张的关系可能会导致该公司重新评估其对这些资产的所有权。全球最大船厂中国船舶集团有限公司及其一些附属公司被列入名单，令造船界感到意外，此举可能会提高美国航运成本。

北京坚决反对美国国防部将中国合法经营的企业列入名单，并敦促美方立即停止错误做法，并将采取必要措施坚决维护中国实体的合法权益。

The 45th week of 2024 market weekly, hiFleet reported that on November 6, 2024, the United States election that attracted worldwide attention finally settled, the Republican Trump defeated the Democratic Harris by a clear advantage to obtain the 47th president of the United States, and in 2016, Trump also defeated Hillary Clinton and was elected the 45th president of the United States. Donald Trump's victory in the US presidential election ushered in his presidential 2.0 era. The shipping community is most concerned about what impact Trump will have on the world shipping market. At that time, we logically focused on the future development trends of the container market, the energy transportation market and the Red Sea issue. As expected, the United States insisted on the United States as the center to introduce a variety of major policies conducive to the development of American shipping, and even resorted to suppressing other countries' shipping to quickly achieve its economic interests, and geopolitics has always been volatile and uncertain.

On January 7, 2025, China Cosco Shipping, the world's largest shipowner, was targeted by the US government for its alleged links to the Chinese military, while oil giant CNOOC was also on the Pentagon's list. In a filing with the Federal Register, the state-owned Chinese company Zhongyuanhai appears on a list of "military enterprises," which is determined by the Pentagon.

According to the media description of the list is a "blacklist", but it is different from the OFAC list, does not mean that it has been included in any sanctions or export control list, will not have an impact on the relevant maritime business and ship operations. However, the purpose of being on the list is to prevent American companies from having financial dealings with these companies. Possibly as a result, Cosco shares fell 4.4 percent in Hong Kong trading on Jan. 7, outperforming the city's benchmark stock index.

In 2019, Cosco was sanctioned by the United States for shipping Iranian oil, causing VLCC rates to soar, but those sanctions were lifted in 2020. The market believes that the impact of the Pentagon list on the crude oil and shipping markets will be small, but it should still have some positive impact on the current shipping market. Cosco's overall fleet of more than 1,000 vessels covers all major sectors, including very large container ships, bulk carriers, oil tankers, general cargo vessels, etc., far ahead of the number two MSC Mediterranean Shipping Co., which has about 770 vessels. The list is likely to have an impact on the container shipping market, as North American container imports account for about 20% of the global container volume, China accounts for 35% to 45% of the North American container volume, and trans-Pacific trade is the largest container route in the middle and Far seas.

Oil giant China National Offshore Oil Corporation (CNOOC) and ship owner Sinotrans, which has a huge fleet of tankers and bulk carriers, are also on the list. Cnooc has two onshore shale oil and gas projects in the U.S., two deepwater projects and interests in several other exploration blocks in the U.S. Gulf of Mexico, according to Bloomberg Intelligence data. The company said in a report late last month that rising tensions with Washington could lead it to reassess its ownership of the assets. The inclusion of China State Shipbuilding Corp., the world's largest shipyard, and some of its affiliates on the list surprised the shipbuilding community, a move that could raise U.S. shipping costs.

Beijing firmly opposes the US Department of Defense's listing of Chinese companies legally operating on the list, and urges the US side to immediately stop the wrong practice and will take necessary measures to resolutely safeguard the legitimate rights and interests of Chinese entities.