



2025年 第3周市场周报

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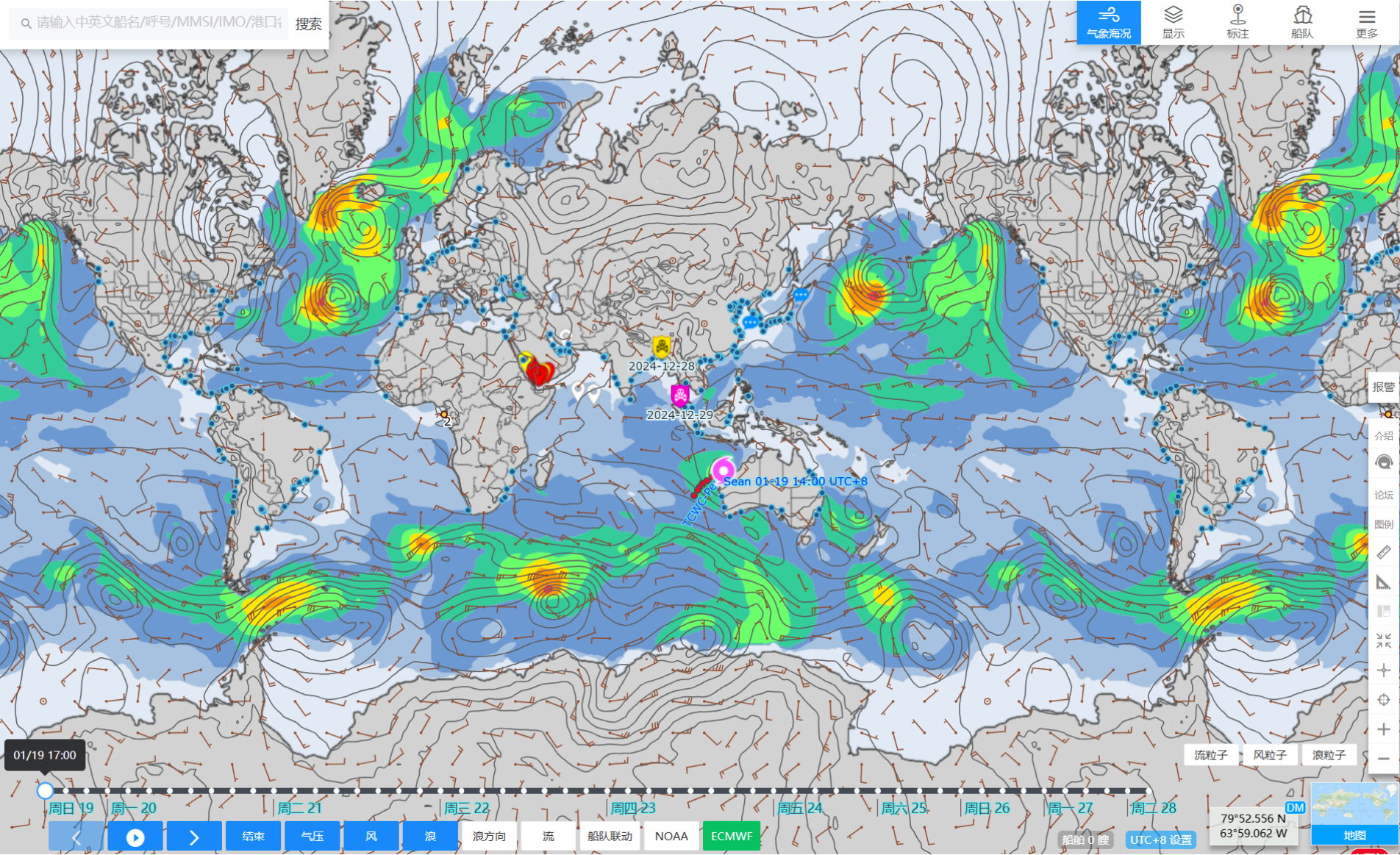
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第八部分

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822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 822 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3-4级，轻浪；黄海风力3-4级，轻浪；东海风力3-4级，中浪；台湾海峡5-6级风，中浪；南海大部海域风力4-5级，有时大浪。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 moderate with slight sea. And China East Sea will be moderate with moderate wave. The wind in the Taiwan Strait will be fresh with rough sea occasionally. In most of the South China Sea the wind will be easy to fresh with 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

委内瑞拉当局扣押了一艘据称未经许可进入其水域的油轮。据委内瑞拉媒体报道，这艘船没有在委内瑞拉水域航行或停靠的授权。该油轮为45000 -dwt Four Plus轮（2000年建造），悬挂圭亚那国旗，搭载了一名中国船员。Venezuelan authorities have seized an oil tanker that allegedly entered their waters without permission. According to Venezuelan media reports, the ship did not have authorization to sail or dock in Venezuelan waters. The tanker is a 45000-dwt Four Plus (built in 2000), flying the Guyanese flag and carrying a Chinese crew.

其它 Others

没有 Nil

备注 Remark

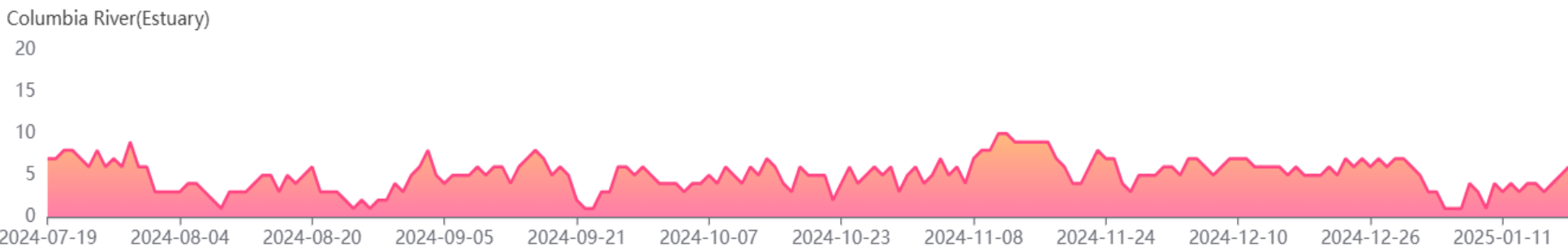
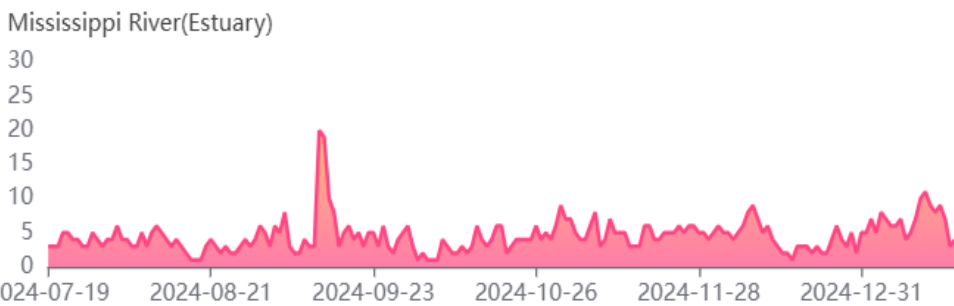
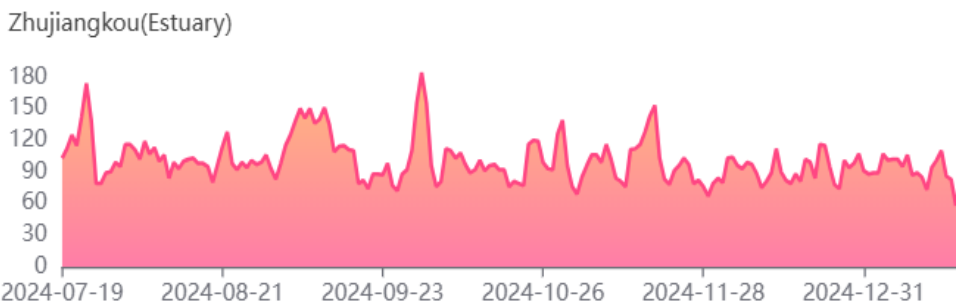
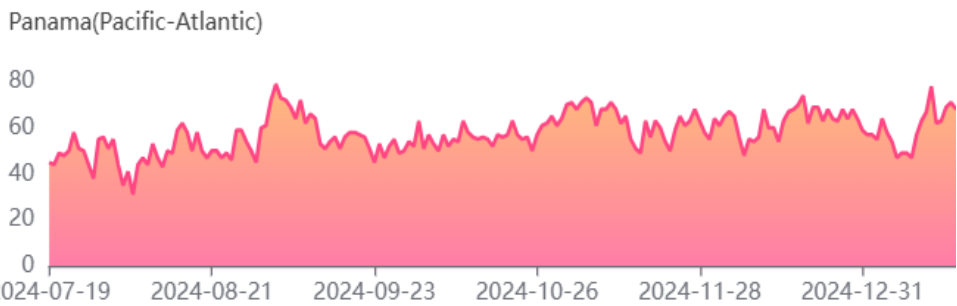
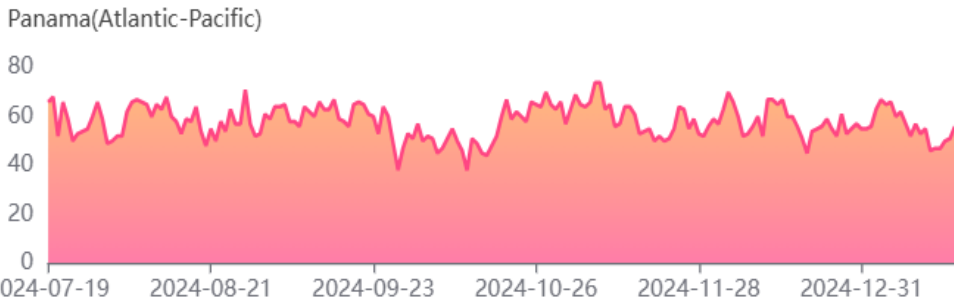
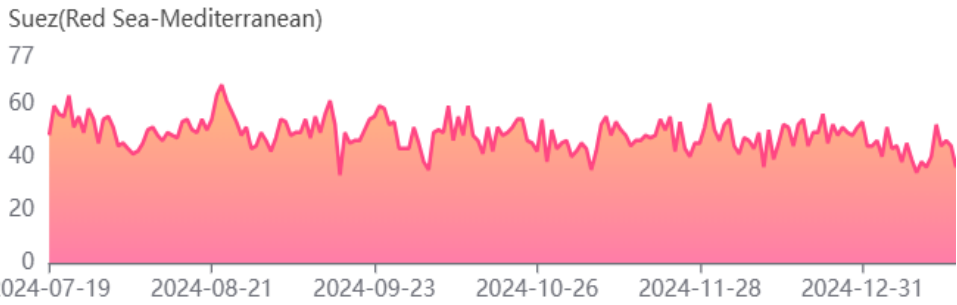
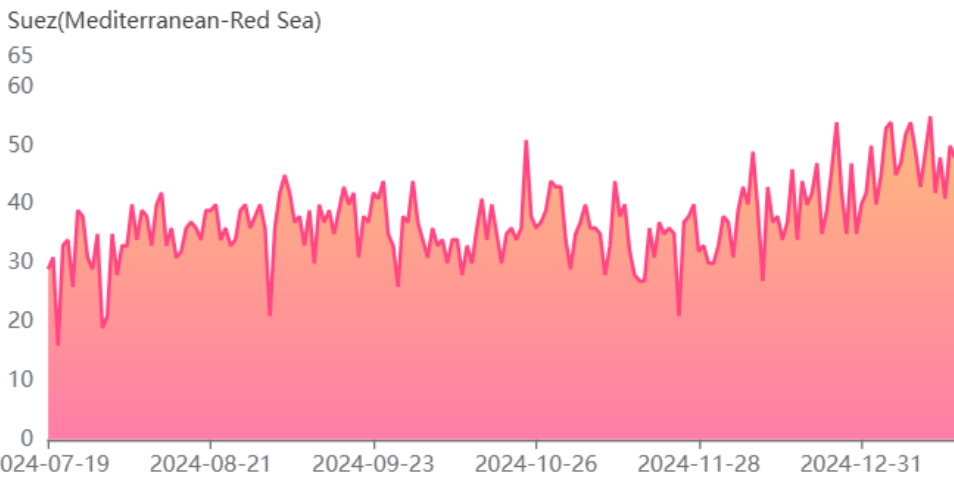
本报告数据截止时间为2025年1月19日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Jan 19th of 2025; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	36	1306	4	-68
Miss.Riv.	4	164	9	30
CJK	160	4569	-79	256
Pa.Atlan.	56	1623	-67	-74
Colum.Riv.	6	126	12	-40
Suez.Med.	48	1327	-21	248
Pa.Pac.	68	1785	117	-23
ZJK	58	2714	-77	109

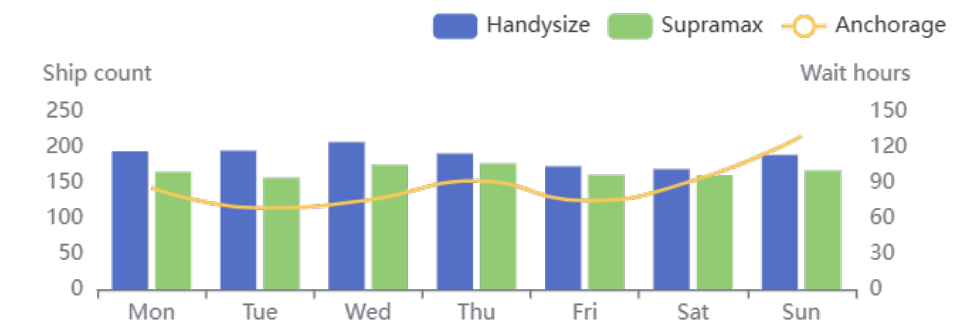


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

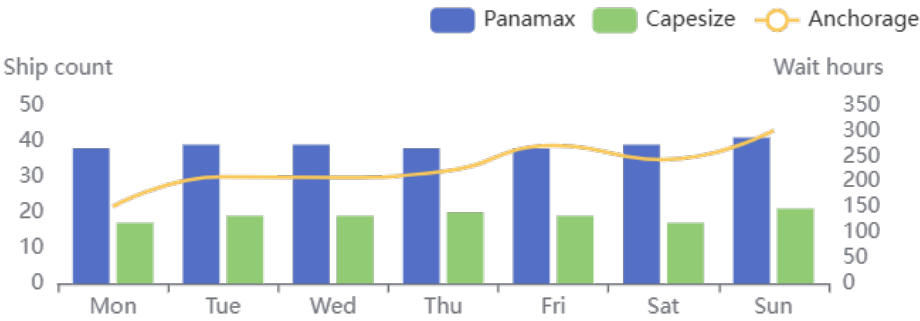
Type	M	T	W	Th	F	Sat	Sun
HDY	194	195	207	191	173	169	189
SMX	165	157	175	177	161	160	167
WT.h.	85.8	68.8	75.4	91.6	75	91.8	129



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

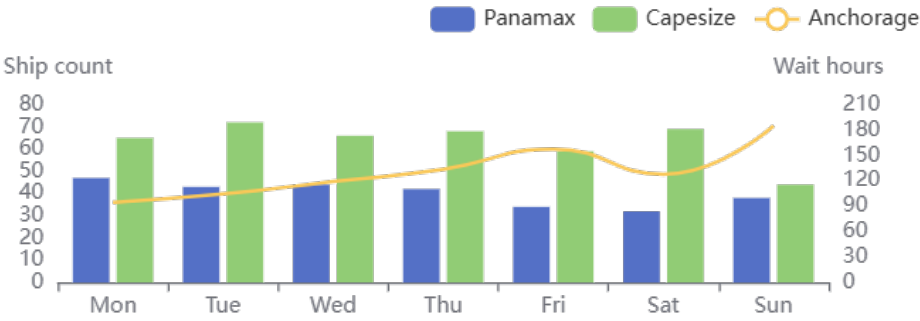
Type	M	T	W	Th	F	Sat	Sun
Pan.	38	39	39	38	38	39	41
Cap	17	19	19	20	19	17	21
WT.h.	151.3	210.3	208.55	220.5	271.4	243.75	301



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

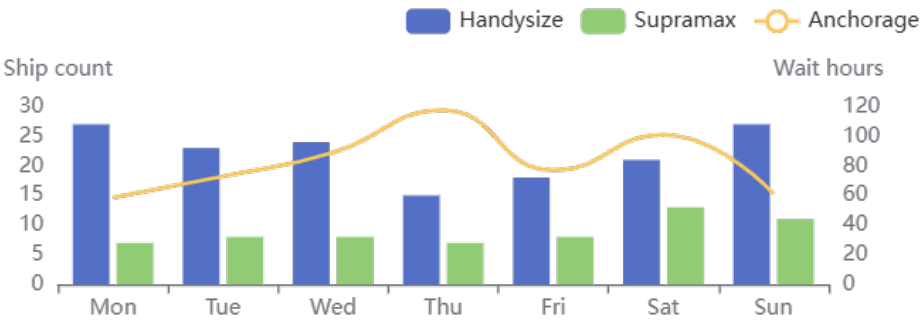
Type	M	T	W	Th	F	Sat	Sun
Pan.	47	43	44	42	34	32	38
Cap	65	72	66	68	59	69	44
WT.h.	94.5	104.5	119.1	133.6	157.6	127.7	185



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

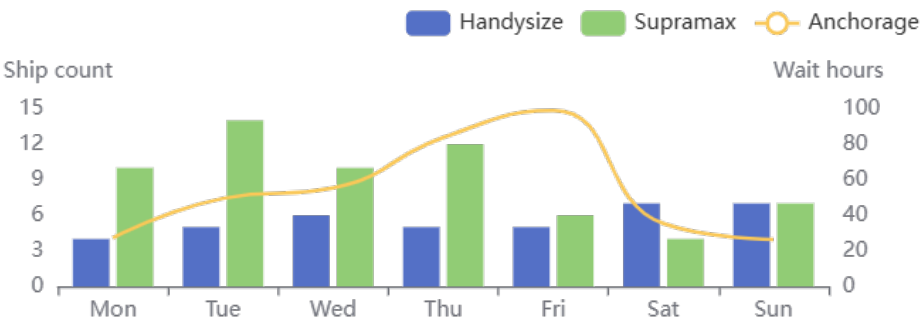
Type	M	T	W	Th	F	Sat	Sun
HDY	27	23	24	15	18	21	27
SMX	7	8	8	7	8	13	11
WT.h.	58.55	73	89	117.6	77	101	61



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

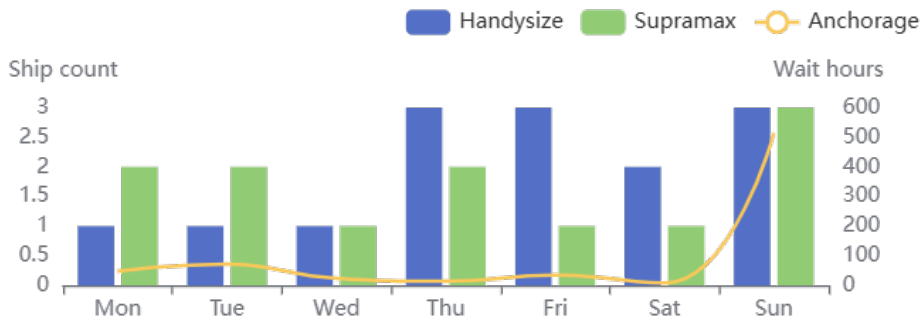
Type	M	T	W	Th	F	Sat	Sun
HDY	4	5	6	5	5	7	7
SMX	10	14	10	12	6	4	7
WT.h.	27.3	49.5	55.4	83.8	99	35.4	26.5



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

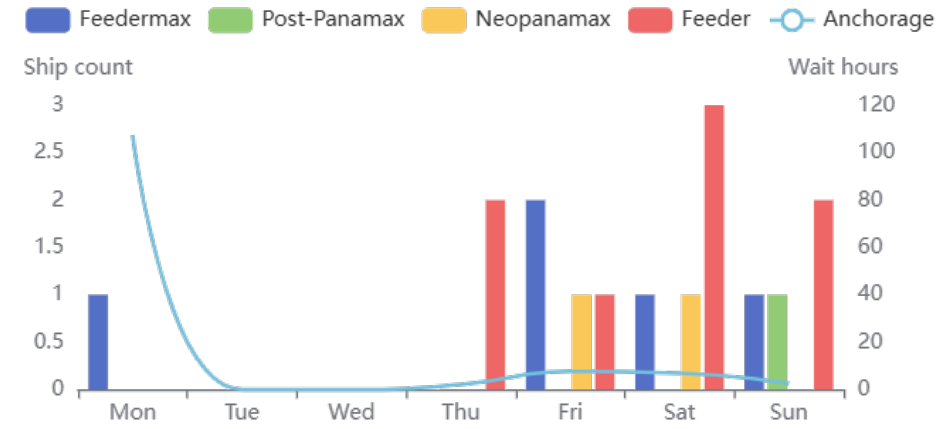
Type	M	T	W	Th	F	Sat	Sun
HDY	1	1	1	3	3	2	3
SMX	2	2	1	2	1	1	3
WT.h.	47.6	71.6	23.65	13.9	34.65	8.2	515



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

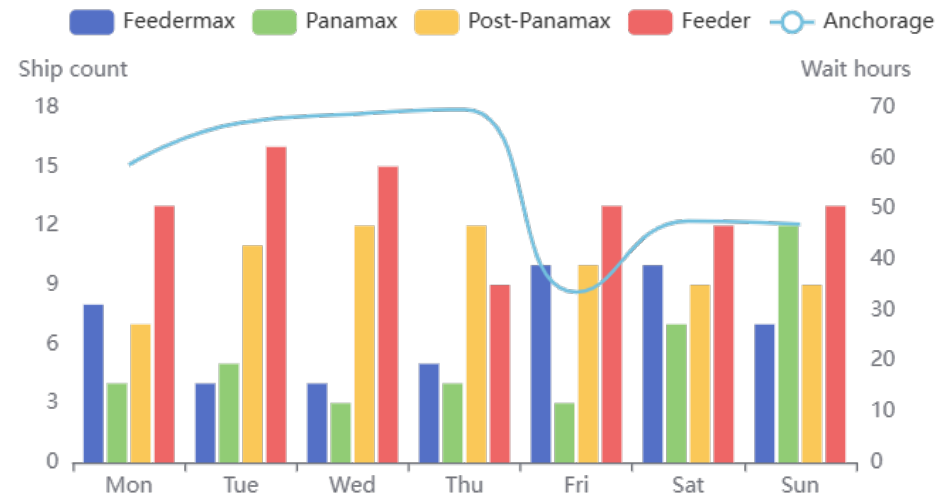
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	0	0	0	2	1	1
Pan.	0	0	0	0	0	0	0
PPx	0	0	0	0	0	0	1
NPx	0	0	0	0	1	1	0
Fd	0	0	0	2	1	3	2
WT.h.	107.4	0.0	0.0	2.1	7.65	6.9	2.5
Ulcw	0	0	0	0	0	0	0



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

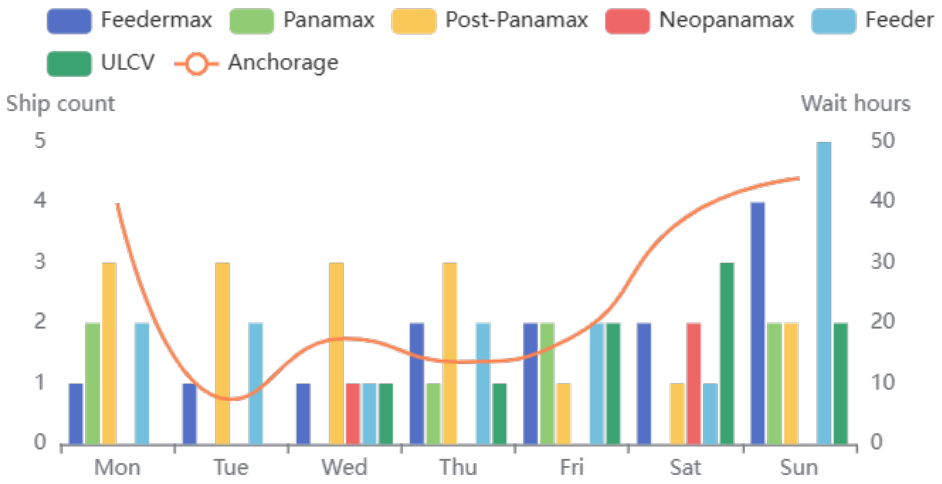
Type	M	T	W	Th	F	Sat	Sun
F.ma.	8	4	4	5	10	10	7
Pan.	4	5	3	4	3	7	12
PPx	7	11	12	12	10	9	9
NPx	0	0	0	0	0	0	0
Fd	13	16	15	9	13	12	13
Ulcw	0	0	0	0	0	0	0
WT.h.	58.7	67	68.7	69.6	33.6	47.6	47



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

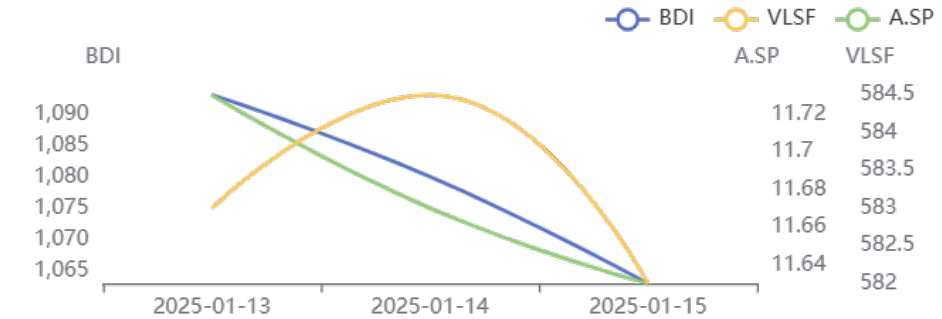
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	1	1	2	2	2	4
Pan.	2	0	0	1	2	0	2
PPx	3	3	3	3	1	1	2
NPx	0	0	1	0	0	2	0
Fd	2	2	1	2	2	1	5
Ulcw	0	0	1	1	2	3	2
WT.h.	39.8	7.4	17.5	13.6	17.7	37.5	44



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

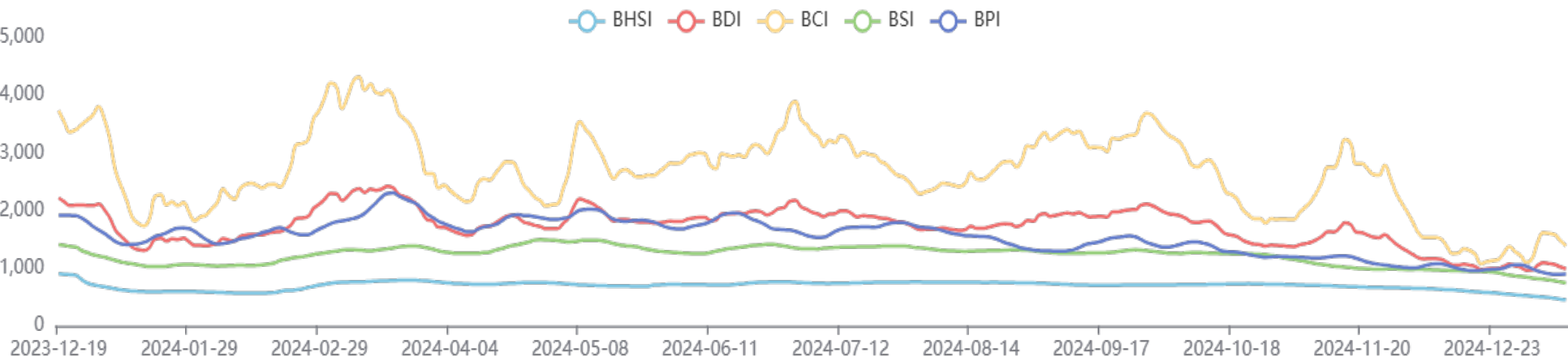
Type	M	T	W	Th	F	Sat	Sun
BDI	809	798	783	897			
VLSF	583.00	584.50	582.00				
A.SP	11.73	11.67	11.63	11.72	11.73	11.74	



第三部分 航运市场 SHIPPING MARKET

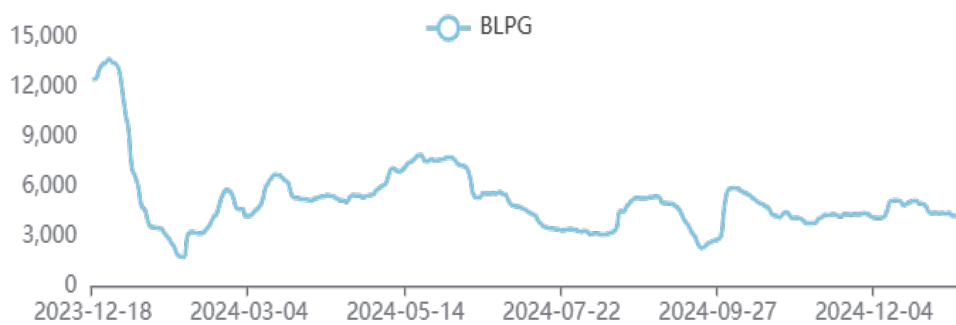
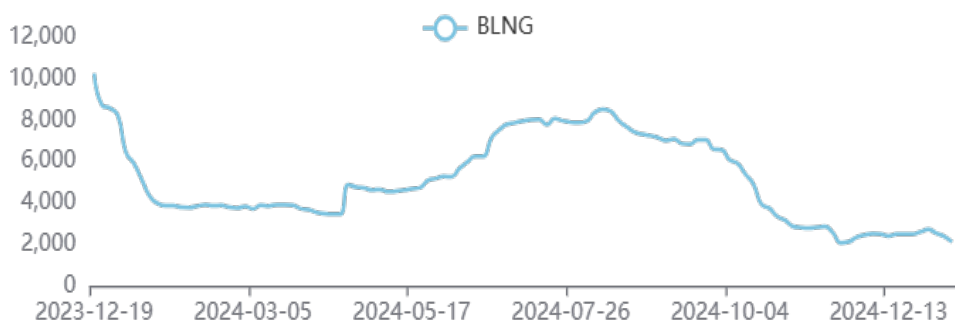
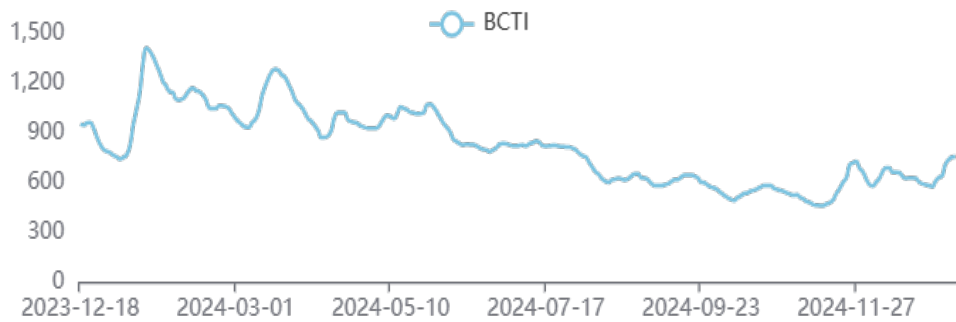
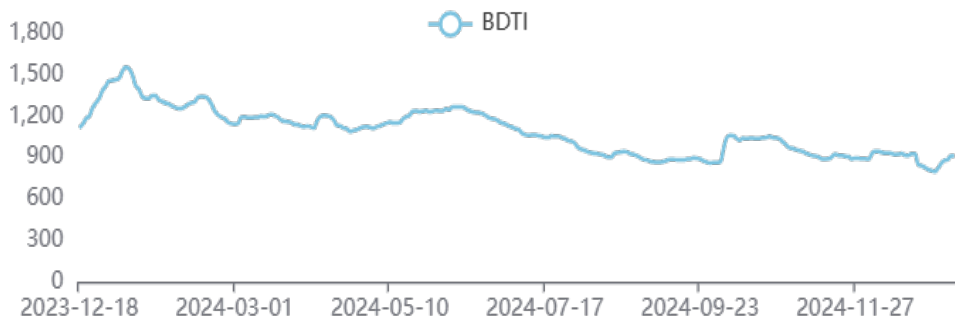
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	987	-61.0	-5.82	-0.3	-24.54
BCI	1393	-55.0	-3.8	24.93	-19.62
BPI	897	-56.0	-5.88	-8.09	-37.97
BSI	747	-72.0	-8.79	-20.53	-28.1
BHSI	453	-55.0	-10.83	-21.76	-23.99



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	912	91.0	11.08	-1.41	-40.86
BCTI	756	127.0	20.19	20.57	-7.69
BLNG	2120	-421.0	-16.57	-15.1	-50.98
BLPG	4220	-161.0	-3.67	-17.67	-11.97



第四部分 运力分布 SUPPLY DISTRIBUTION

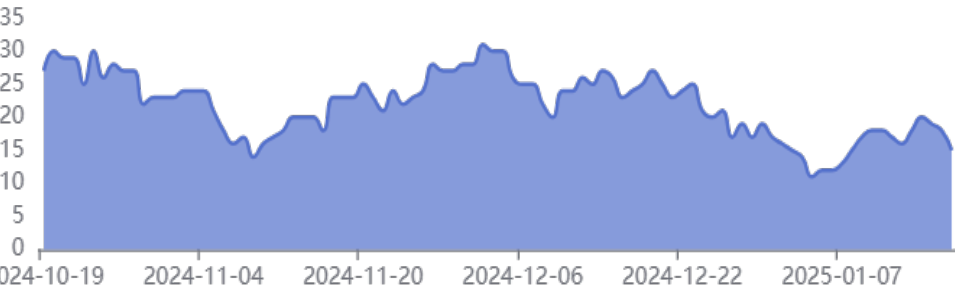


好望角型散货船 Capesize

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	17	16	18	20	19	18	15



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.

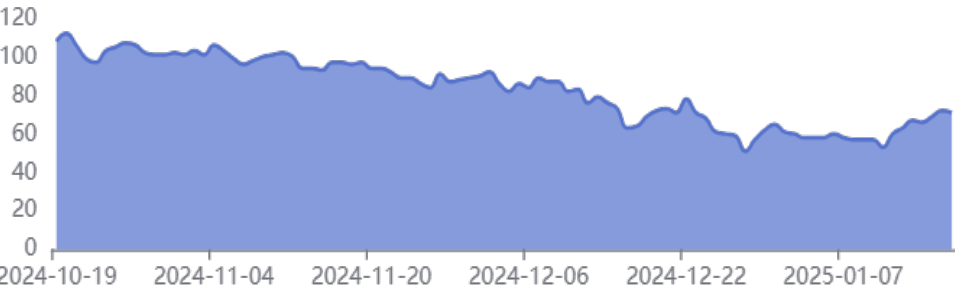
Type	M	T	W	Th	F	Sat	Sun
Cape	28	27	29	25	28	28	29

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.

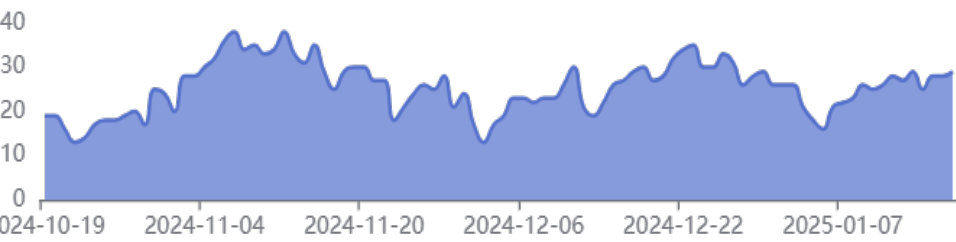
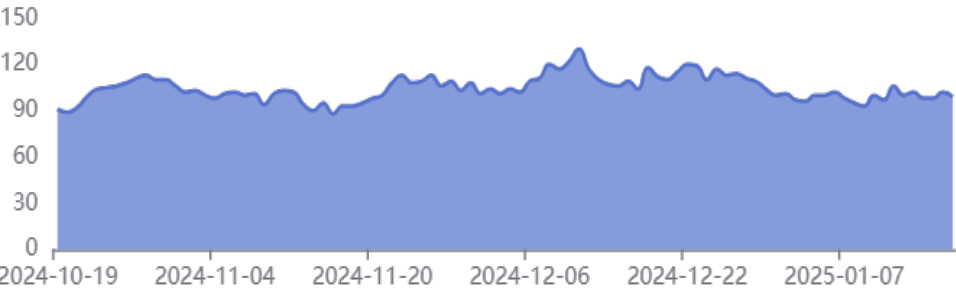
Type	M	T	W	Th	F	Sat	Sun
Pan.	60	63	67	66	69	72	71



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.

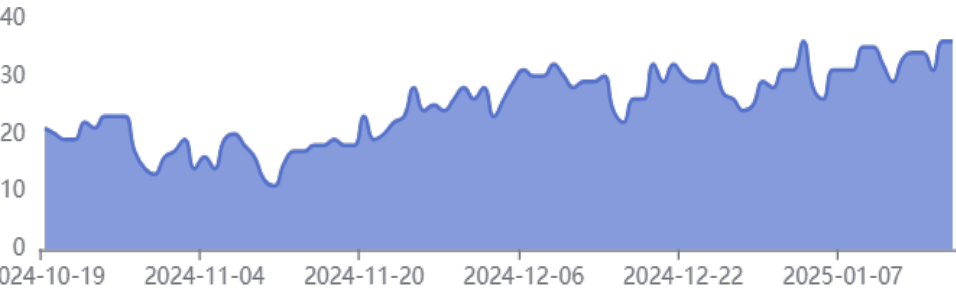
Type	M	T	W	Th	F	Sat	Sun
Cape	106	100	102	98	98	102	99



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.

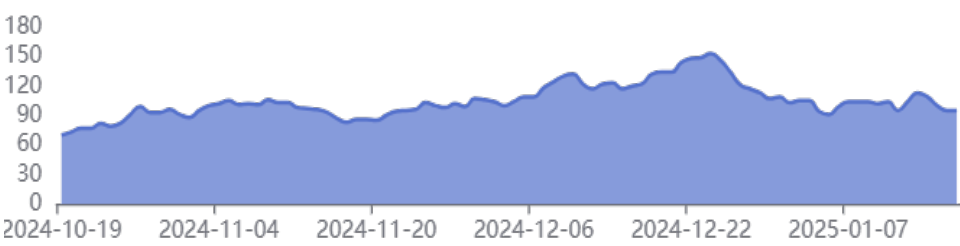
Type	M	T	W	Th	F	Sat	Sun
Pan.	16	20	19	19	19	19	20



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.	95	104	113	109	100	95	95

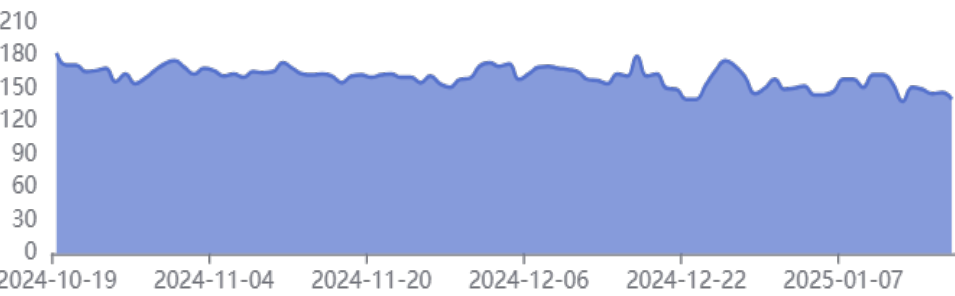


超大灵便型散货 SUPRAMAX

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.

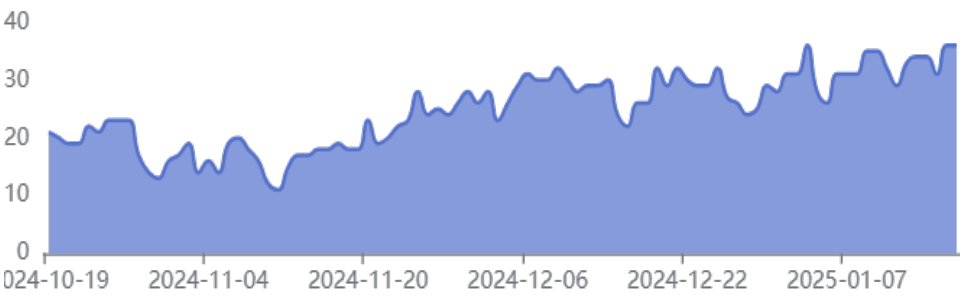
Type	M	T	W	Th	F	Sat	Sun
SMX	154	138	151	149	145	146	140



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.

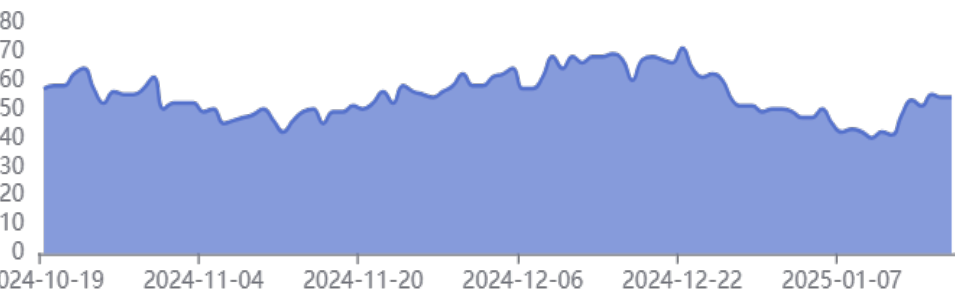
Type	M	T	W	Th	F	Sat	Sun
SMX	29	33	34	34	31	36	36



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.

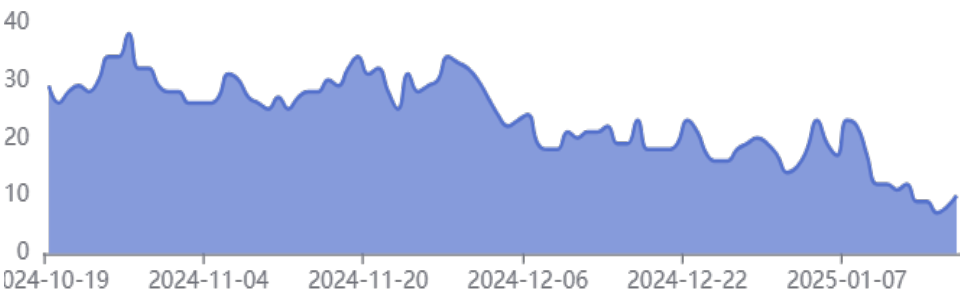
Type	M	T	W	Th	F	Sat	Sun
SMX	11	12	9	9	7	8	10



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.

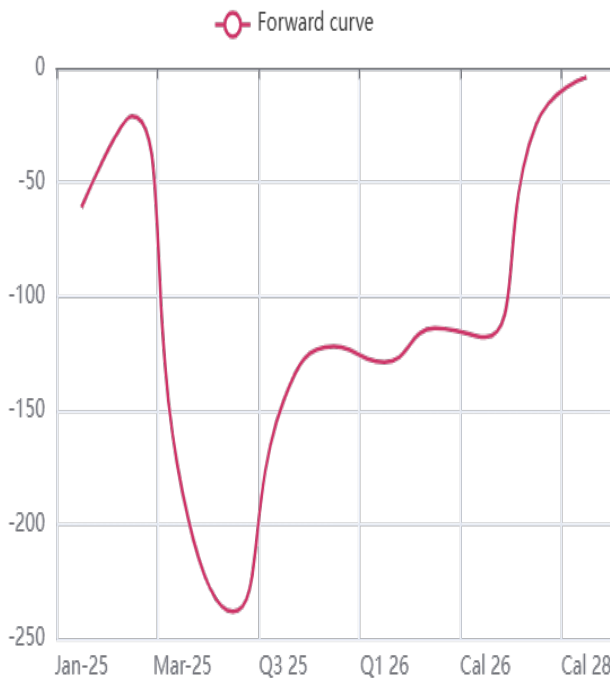
Type	M	T	W	Th	F	Sat	Sun
SMX	41	48	53	51	55	54	54



第五部分 远期运价协议 FFA

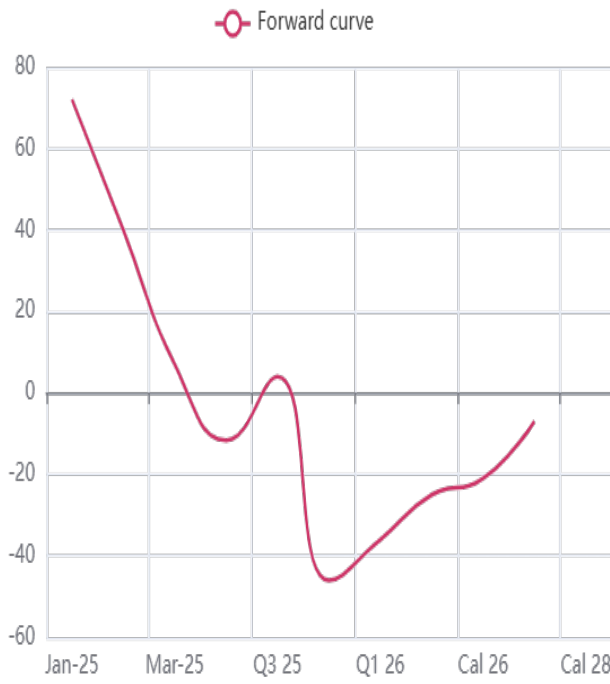
好望角型散货船Capesize

5TC	\$/day	WoW	
Jan-25	10,682.00	-61.0	-0.6 %
Feb-25	9,125.00	-21.0	-0.2 %
Mar-25	13,089.00	-186.0	-1.4 %
Q2 25	16,755.67	-238.33	-1.4 %
Q3 25	20,554.00	-146.0	-0.7 %
Q4 25	21,782.00	-122.0	-0.6 %
Q1 26	11,950.00	-129.0	-1.1 %
Q2 26	17,111.00	-114.0	-0.7 %
Cal 26	17,696.00	-118.0	-0.7 %
Cal 27	18,200.00	-25.0	-0.1 %
Cal 28	18,500.00	-4.0	0.0 %



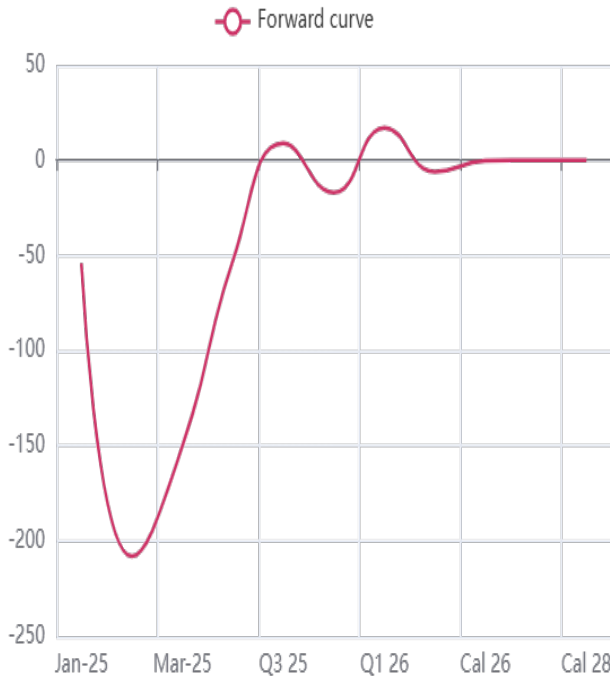
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jan-25	7,104.00	72.0	1.0 %
Feb-25	7,279.00	40.0	0.6 %
Mar-25	9,496.00	7.0	0.1 %
Q2 25	10,919.00	-11.67	-0.1 %
Q3 25	11,300.00	4.0	0.0 %
Q4 25	10,936.00	-46.0	-0.4 %
Q1 26	9,657.00	-36.0	-0.4 %
Q2 26	10,661.00	-25.0	-0.2 %
Cal 26	10,229.00	-21.0	-0.2 %
Cal 27	10,436.00	-7.0	-0.1 %
Cal 28	-	-	-



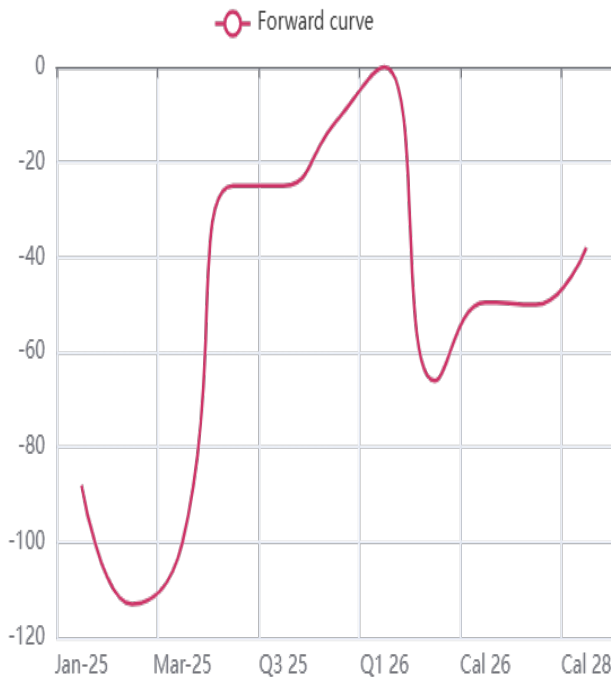
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Jan-25	7,775.00	-54.0	-0.7 %
Feb-25	7,475.00	-208.0	-2.7 %
Mar-25	9,525.00	-150.0	-1.6 %
Q2 25	10,850.33	-52.67	-0.5 %
Q3 25	11,267.00	9.0	0.1 %
Q4 25	11,046.00	-17.0	-0.2 %
Q1 26	10,175.00	17.0	0.2 %
Q2 26	10,575.00	-6.0	-0.1 %
10,475.00	Cal 26	-0.25	0.0 %
Cal 27	10,842.00	0.0	0.0 %
Cal 28	11,167.00	0.0	0.0 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Jan-25	8,700.00	-88.0	-1.0 %
Feb-25	7,950.00	-113.0	-1.4 %
Mar-25	9,613.00	-100.0	-1.0 %
Q2 25	10,650.33	-25.0	-0.2 %
Q3 25	10,900.00	-25.0	-0.2 %
Q4 25	10,738.00	-12.0	-0.1 %
Q1 26	9,525.00	0.0	0.0
Q2 26	10,176.00	-66.0	-0.6 %
Cal 26	10,013.25	-49.5	-0.5 %
Cal 27	10,500.00	-50.0	-0.5 %
Cal 28	10,825.00	-38.0	-0.3 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	601.5	522.5	744.0	79.0	-12.0	-13.19	-21.0
Singapore	599.0	510.0	742.5	89.0	-10.0	-10.1	3.49
Rotterdam	550.0	471.5	707.0	78.5	-4.0	-4.85	38.94
Fujairah	595.0	481.5	756.5	113.5	-3.0	-2.58	7.08
Houston	588.0	490.5	785.5	97.5	-11.5	-10.55	-2.5

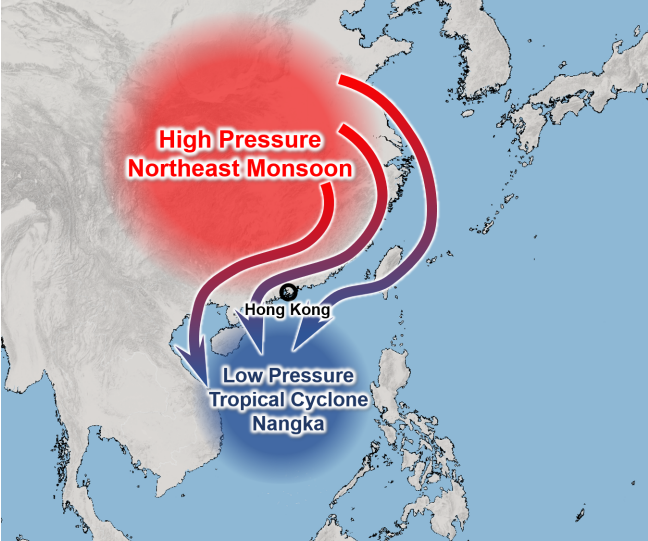
(MP-Bunkering Main Ports; LO-Heavy Low Sulphur Fuel Oil; HO-Heavy Hight Sulphur Fuel Oil; MO-MGO; SP-Spread;)



第七部分 最新商品价格 LATEST COMMODITIES PRICE

Grains and Oilseeds	Index		+/-	Weekly	Monthly	YTD
Wheat	199.0		1.0	0.51	-1.0	-10.36
Maize	235.0		7.0	3.07	5.86	3.52
Soybeans	209.0		8.0	3.98	2.45	-15.04
Rice	203.0		-1.0	-0.49	-4.25	-22.52
Barley	222.0		0.0	0.0	-0.45	0.45
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	77.62	1.05	1.37	9.77	6.4
Brent	USD/Bbl	79.94	0.18	0.23	8.11	2.87
Natural Gas	USD/MMBtu	3.89	-0.1	-2.51	20.81	36.97
Gasoline	USD/Gal	2.12	0.05	2.42	7.07	2.42
Heating Oil	USD/Gal	2.54	0.04	1.6	12.39	-2.68
Ethanol	USD/Gal	1.72	0.04	2.38	8.86	8.86
Naphtha	USD/T	649.71	2.23	0.34	7.03	3.25
Propane	USD/Gal	0.89	0.02	2.3	14.1	27.14
Uranium	USD/Lbs	73.75	0.2	0.27	-3.72	-18.96
Methanol	CNY/T	2665.0	8.0	0.3	2.22	11.37
TTF Gas	EUR/MWh	47.3	1.86	4.09	19.72	45.81
UK Gas	GBp/thm	118.88	4.98	4.37	18.09	45.33
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.3	-0.01	-0.23	4.12	13.76
Coal	USD/T	115.4	-0.35	-0.3	-10.37	-12.28
Steel	CNY/T	3216.0	78.0	2.49	-2.22	-16.32
Iron Ore	USD/T	98.72	0.63	0.64	-6.26	-30.23
Aluminum	USD/T	2566.0	-5.5	-0.21	0.75	13.46
Lithium	CNY/T	76350.0	650.0	0.86	0.46	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2673.15	-12.46	-0.46	0.76	31.82
Silver	USD/t.oz	29.82	-0.56	-1.84	-2.2	30.22
Platium	null	932.9	-44.2	-4.52	-0.18	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.03		0.01	0.98	-1.9	-5.5
USD/CNY	7.35		-0.01	-0.14	0.82	2.51

第八部分 本周话题 WEEKLY TOPIC



南中国海强东北季风导致两艘船舶沉没

上个周末新加坡海事部门可算忙坏了，季风带来的暴雨和大风袭击了东南亚地区，一艘杂货船和一艘小油轮沉没，另外一艘成品油轮起火，东南亚海事安全官员处于高度戒备状态。

第一艘沉没的船只是悬挂越南国旗的7900载重吨的杂货船DOLPHIN 18轮（1999年建造），于1月10号晚上遭遇大风巨浪，在11日早晨于越南Vung Tau西南约274海里（507公里）处不幸沉没。根据新加坡海事和港口管理局消息，该船在11号早上7点（格林尼治标准时间2300）发出了求救信号，当时得到一艘3万载重吨的集装箱船Nicolai Maersk（2000年建造）的回应，据hiFleet航运大数据显示，Nicolai Maersk 距离该遇险船舶20海里左右，从广州前往新加坡的途中。失事船DOLPHIN 18轮当时载有18名越南船员。Nicolai Maersk轮及时从救生艇上救出了该18名船员，但这艘船还是沉没了，18名船员将在马来西亚丹戎佩勒帕斯港下船。当时由hiFleet提供气象导航的一艘集装箱船距离该船200多海里。最近南海受东北季风影响，hiFleet建议船舶靠近越南东岸航行或走菲律宾西海岸，避开巨浪。

根据新加坡海事和港口管理局（MPA）消息，第二艘沉没的船只是悬挂马来西亚国旗的1200载重吨油轮Silver Sincere 轮（1987年建造）。Silver Sincere 轮因为进水，于1月12日下午向新加坡海事和港口管理局发出了求救信号，当时该船正在新加坡佩德拉布兰卡附近的领海内，船上载有8名船员。根据MPA的报道，MPA当时指示Teguh Persada Kencana的印尼国旗12,000载重吨货船Intan Daya 368（2013年建造）去营救船员，计划船员们将被送到印度尼西亚的Batu Ampar。同时新加坡共和国海军和新加坡警察海岸警卫队的船只很快进入搜救阶段，并部署了打捞拖船和溢油应急船。据hiFleet船舶

档案显示，Silver Sincere由马来西亚CCK资本所有，由巴生的沙坑玩家半岛海事公司运营。

祸不单行，2025年1月12日上午早些时候，悬挂蒙古国旗的7700载重吨成品油轮EAGLE 1（1995年建造）在丹绒比艾岛东南部起火，马来西亚海事执法机构（MMEA）开始了搜救行动。马来西亚海岸警卫队的船只和拖船被派往这艘悬挂蒙古国旗的油轮灭火。这艘油轮属于阿拉伯联合酋长国的凡科尔埃米尔石油公司。当天晚些时候，火势得到了控制，没有发现石油泄漏。MMEA表示，EAGLE 1的14名船员，包括缅甸人、印度尼西亚人和新加坡人，被一艘海岸警卫队的船只疏散到岸上。该船另一名船员是一名印度尼西亚公民，他漂流到新加坡水域，后来被发现失去知觉，被送往医院接受进一步治疗。

根据hiFleet气象大数据跟踪，该季风是由北亚高压系统的加强引起的，这给南中国海带来了强烈的东北季风，请相关水域船舶时时注意航行安全。

It was a busy weekend for Singapore's maritime authorities, as monsoon rains and winds battered Southeast Asia, sinking a general cargo ship and a small oil tanker and setting fire to another product tanker, putting maritime safety officials in Southeast Asia on high alert.

The first vessel to sink, the Vietnamese-flagged 7,900 WT general cargo vessel DOLPHIN 18 (built in 1999), was hit by high winds and waves on the night of January 10 and sank on the morning of January 11 about 274 nautical miles (507 km) southwest of Vung Tau, Vietnam. According to the Maritime and Port Authority of Singapore, the ship sent a distress signal at 7:00 am (2300 GMT) on the 11th, when it received a response from a 30,000 DWT container ship Nicolai Maersk (built in 2000), according to hiFleet shipping Big Data. Nicolai Maersk was about 20 nautical miles from the vessel, en route from Guangzhou to Singapore. The DOLPHIN 18 was carrying 18 Vietnamese crew members. Nicolai Maersk rescued the 18 crew members from the lifeboat in time, but the ship sank and the 18 crew members will disembark at the Malaysian port of Tanjong Pellepas. A container ship with weather navigation provided by hiFleet at the time was more than 200 nautical miles away. Recently, the South China Sea has been affected by the Northeast monsoon, hiFleet advised ships to sail close to the east coast of Vietnam or the west coast of the Philippines to avoid large waves.

According to the Maritime and Port Authority of Singapore (MPA), the second vessel to sink was the Malaysian-flagged 1,200-DWT tanker Silver Sincere (built in 1987). The Silver Sincere sent a distress call to the Maritime and Port Authority of Singapore on the afternoon of January 12, when it was in Singapore's territorial waters near Pedra Branca with eight crew members on board. The MPA directed Teguh Persada Kencana's Indonesian-flagged 12,000 DWT cargo ship Intan Daya 368 (built in 2013) to rescue the crew, who were scheduled to be transported to Batu Ampar, Indonesia. Meanwhile, vessels of the Republic of Singapore Navy and Singapore Police Coast Guard soon entered the search and rescue phase and deployed salvage tugs and oil spill response vessels. According to hiFleet ship archives, Silver Sincere is owned by CCK Capital Malaysia and operated by Klang-based bunker Player Peninsula Marine.

Early on the morning of January 12, 2025, the Mongolian flagged 7,700 DWT product tanker EAGLE 1 (built in 1995) caught fire in southeast Tanjung Biai, causing the Malaysian Maritime Enforcement Agency (MMEA) to launch a search and rescue operation. Malaysian Coast Guard vessels and tugboats were dispatched to extinguish the fire on the Mongolian-flagged tanker. The tanker belongs to the Emir Van Kor Oil Company of the United Arab Emirates. The fire was brought under control later that day and no oil leaks were found. MMEA said 14 crew members of EAGLE 1, including Burmese, Indonesians and Singaporeans, were evacuated to shore by a coast guard vessel. Another member of the boat's crew, an Indonesian citizen, drifted into Singapore waters and was later found unconscious and taken to hospital for further treatment.

According to hiFleet meteorological big data tracking, the monsoon is caused by the strengthening of the North Asia high pressure system, which brings a strong northeast monsoon to the South China Sea, please pay attention to the safety of navigation in relevant waters.

