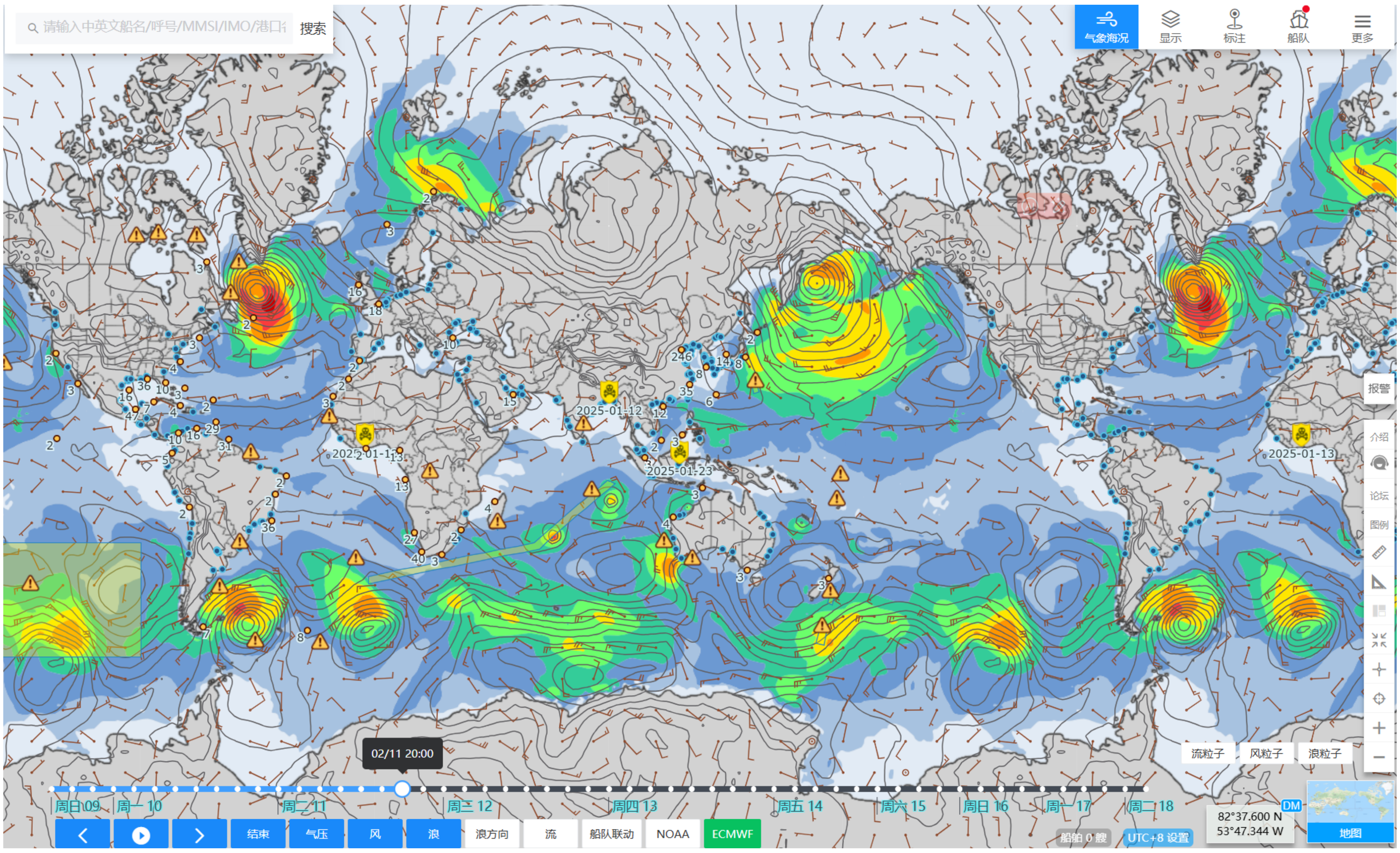
2025年
第6周市场周报

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850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 850 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4-6级，轻浪；黄海风力4-6级，增强，有中浪；东海风力4-6级，有中浪；台湾海峡7-4级风，风力减弱，周初有大浪；南海大部海域风力5-6级，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 become strong to fresh with moderate sea. Yellow Sea will become strong as well with moderate sea. And China East Sea will become strong with very moderate sea. The wind in the Taiwan Strait will become weak from near gale to moderate with very rough sea in the early of the next week. In most of the South China Sea the wind stay strong with very rough sea in the first half of the week. 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

在几内亚湾航行的商船面临持续的海盗威胁。2月2号，当地时间21点35分，一艘悬挂葡萄牙国旗的普通货船在赤道几内亚巴拉西北54海里（100公里）处遭到三名武装人员的袭击。Commercial vessels sailing in the Gulf of Guinea are under constant threat from piracy. On February 2, at 21:35 local time, a general cargo ship flying the Portuguese flag was attacked by three armed men 54 nautical miles (100 km) northwest of Bara, Equatorial Guinea.

其它 Others

没有 Nil

备注 Remark

本报告数据截止时间为2025年9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 Feb 9th of 2025; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

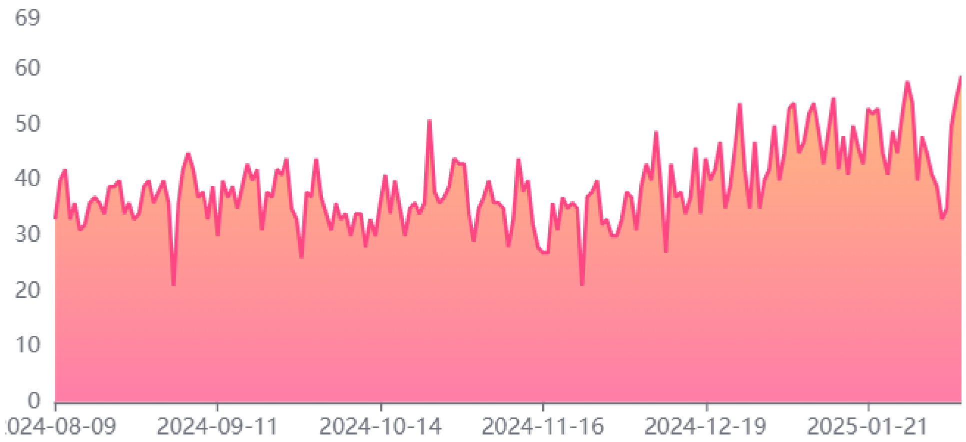
第二部分 航运数据 SHIPPING DATA

最近一周船舶运河/河口锚地等待数量

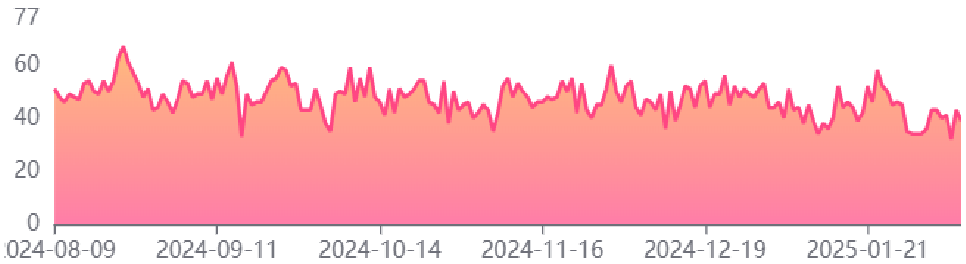
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	39	1229	8	-125
Miss.Riv.	10	273	-18	144
CJK	110	4901	-349	408
Pa.Atlan.	62	1619	-16	-45
Colum.Riv.	5	151	7	16
Suez.Med.	59	1364	-34	93
Pa.Pac.	50	1894	-38	114
ZJK	90	3494	-85	770

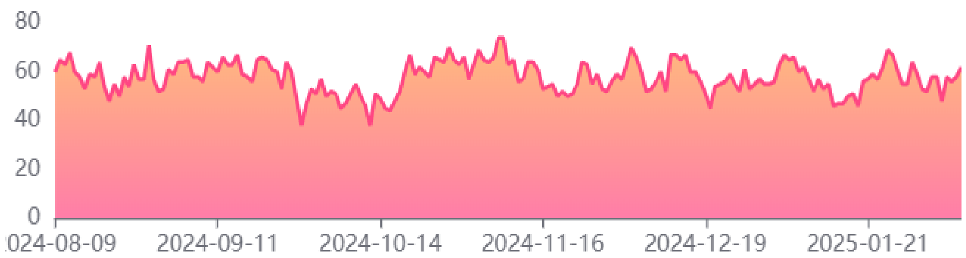
Suez(Mediterranean-Red Sea)



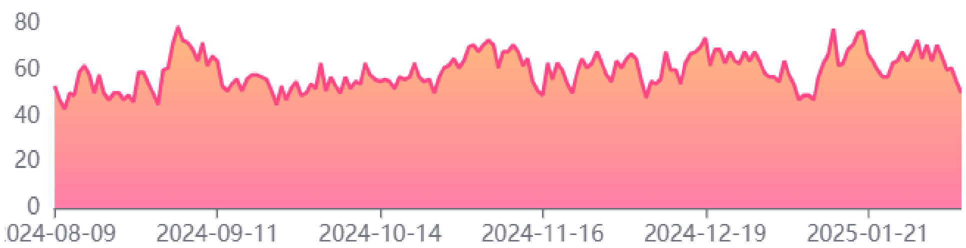
Suez(Red Sea-Mediterranean)



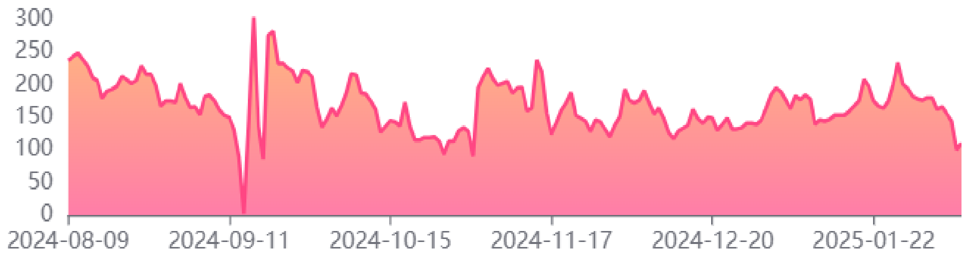
Panama(Atlantic-Pacific)



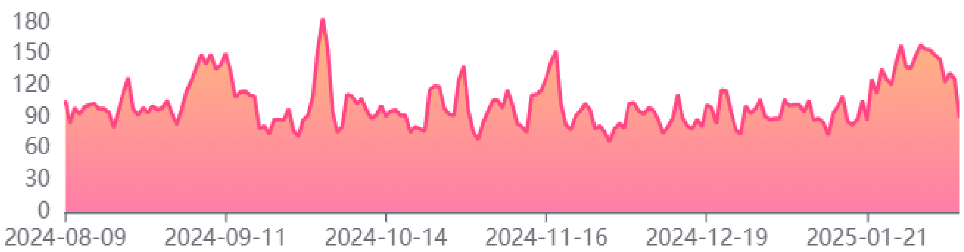
Panama(Pacific-Atlantic)



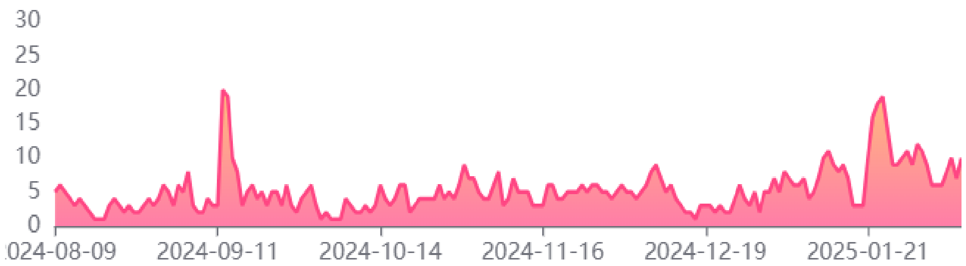
Changjiangkou(Estuary)



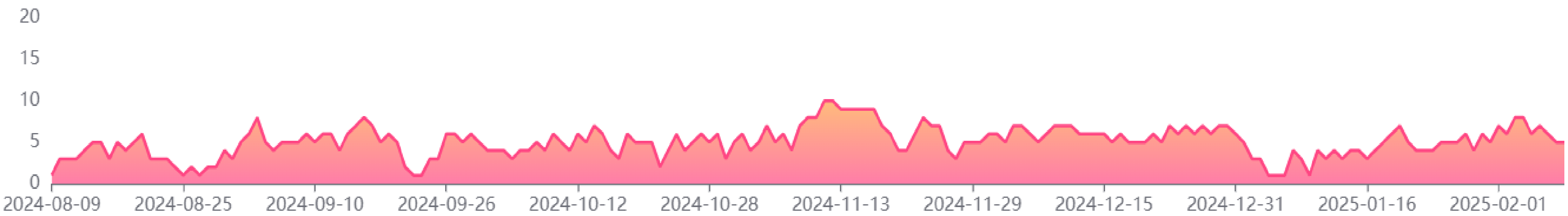
Zhujiangkou(Estuary)



Mississippi River(Estuary)



Columbia River(Estuary)

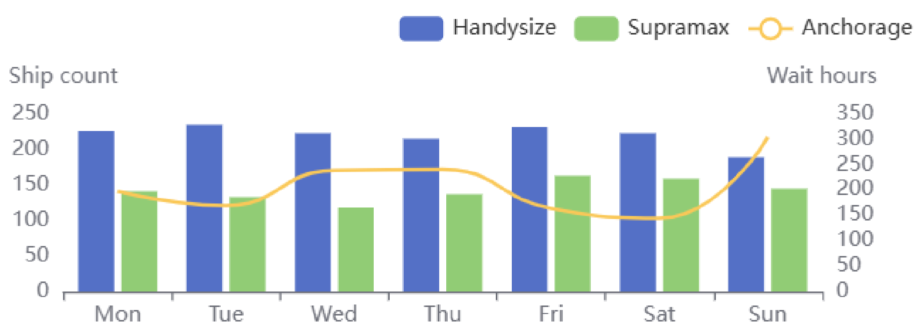


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

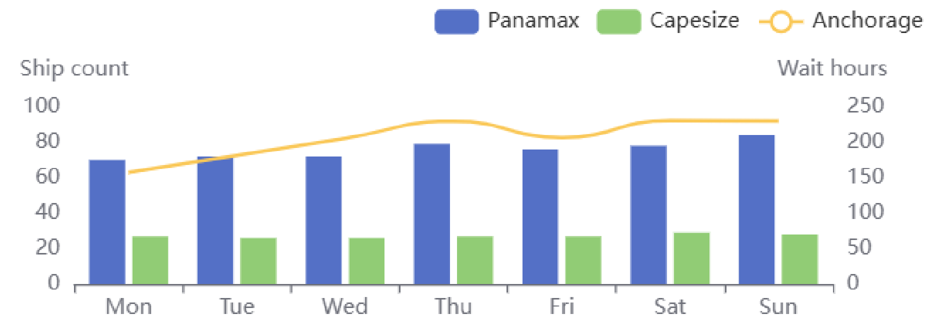
Type	M	T	W	Th	F	Sat	Sun
HDY	226	235	223	215	232	223	189
SMX	141	133	118	137	163	159	145
WT.h.	197.8	169.4	239	240.8	164	144.4	304



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

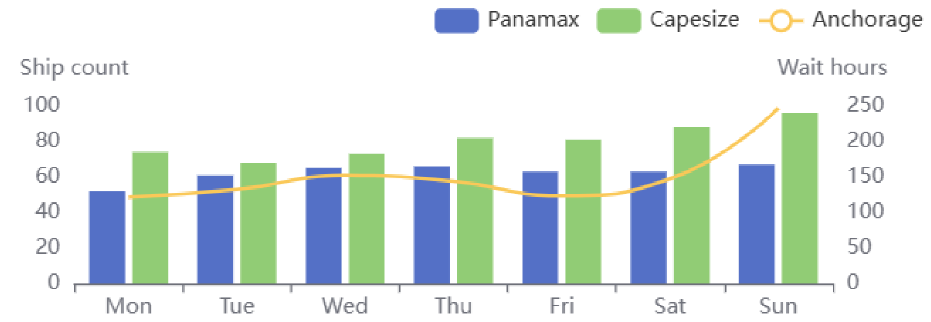
Type	M	T	W	Th	F	Sat	Sun
Pan.	70	72	72	79	76	78	84
Cap	27	26	26	27	27	29	28
WT.h.	157.7	181.7	205.7	229.7	206.7	230.7	230



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

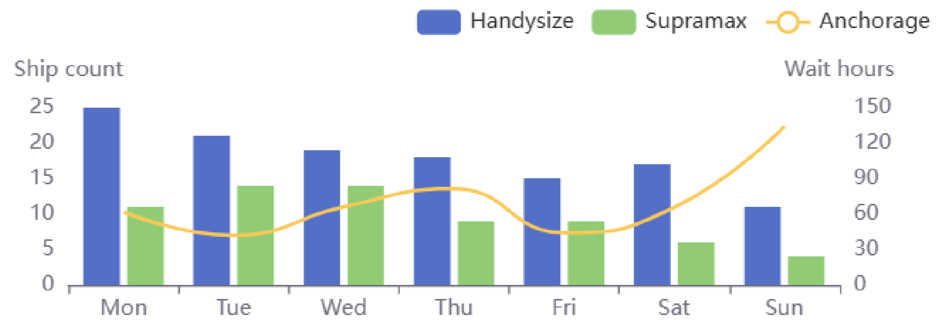
Type	M	T	W	Th	F	Sat	Sun
Pan.	52	61	65	66	63	63	67
Cap	74	68	73	82	81	88	96
WT.h.	121.5	132.3	152.3	143.9	123.4	147.4	247



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

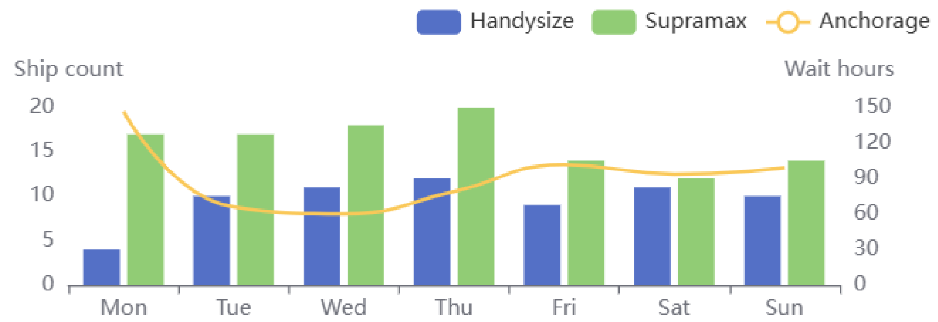
Type	M	T	W	Th	F	Sat	Sun
HDY	25	21	19	18	15	17	11
SMX	11	14	14	9	9	6	4
WT.h.	61.75	42	66	81.4	44	65.6	134



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

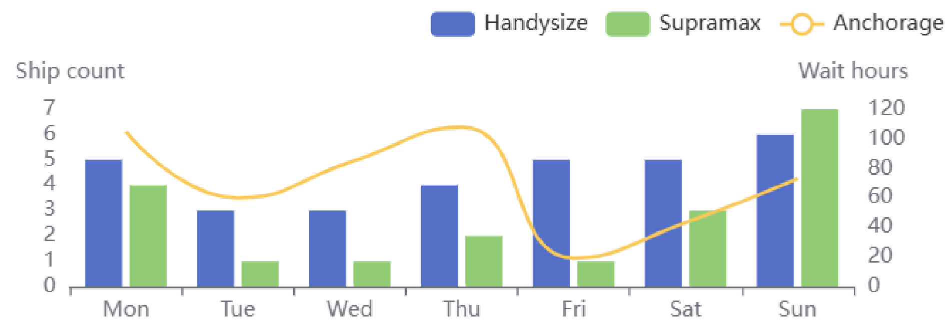
Type	M	T	W	Th	F	Sat	Sun
HDY	4	10	11	12	9	11	10
SMX	17	17	18	20	14	12	14
WT.h.	146.5	65.9	60.1	79.0	101.6	93.7	99



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

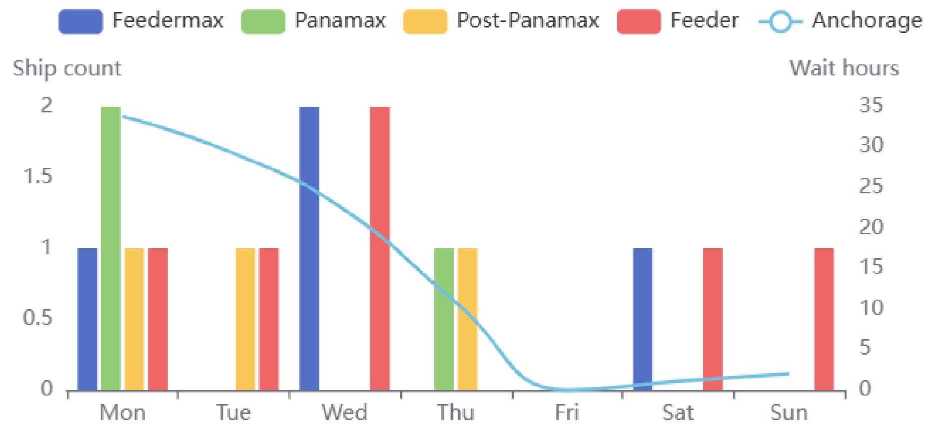
Type	M	T	W	Th	F	Sat	Sun
HDY	5	3	3	4	5	5	6
SMX	4	1	1	2	1	3	7
WT.h.	104.8	60.1	84.1	108.1	19.3	43.3	73



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

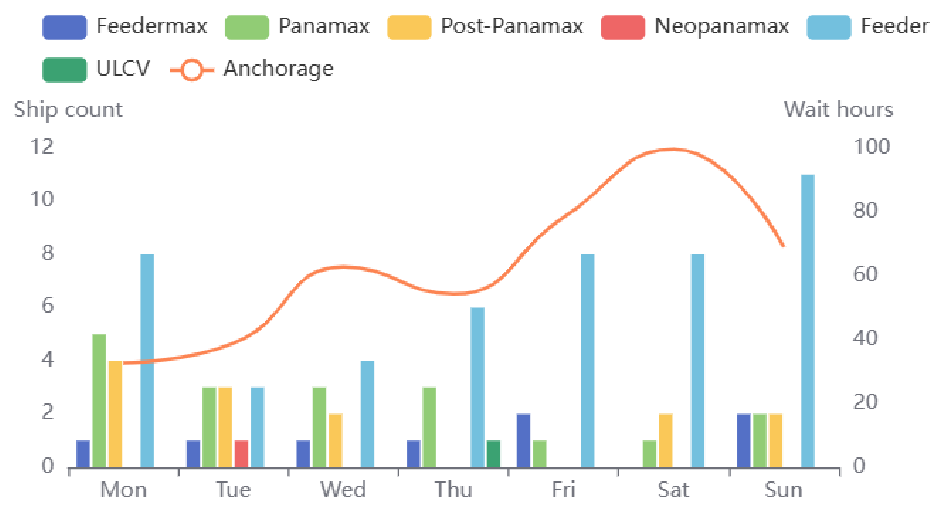
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	0	2	0	0	1	0
Pan.	2	0	0	1	0	0	0
PPx	1	1	0	1	0	0	0
NPx	0	0	0	0	0	0	0
Fd	1	1	2	0	0	1	1
WT.h.	33.8	29.25	22.25	10.85	0.0	1.1	2
Ulcv	0	0	0	0	0	0	0



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

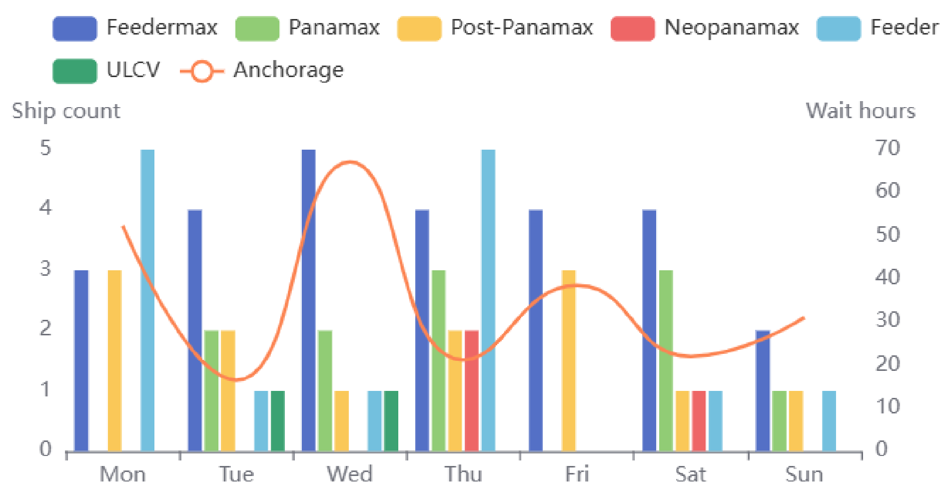
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	1	1	1	2	0	2
Pan.	5	3	3	3	1	1	2
PPx	4	3	2	0	0	2	2
NPx	0	1	0	0	0	0	0
Fd	8	3	4	6	8	8	11
Ulcv	0	0	0	1	0	0	0
WT.h.	32.7	38.8	62.8	54.3	78.3	99.7	69



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

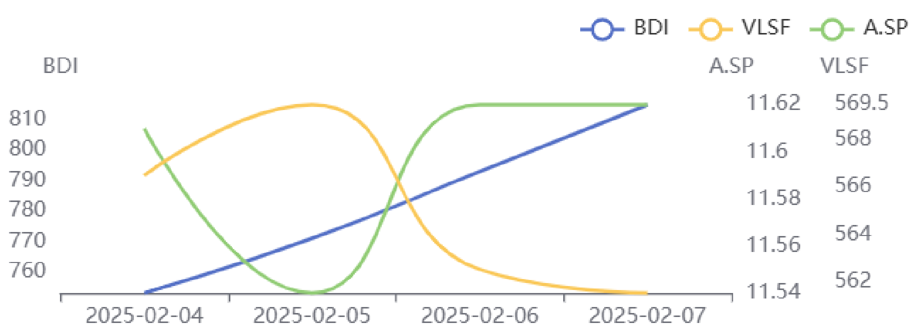
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	4	5	4	4	4	2
Pan.	0	2	2	3	0	3	1
PPx	3	2	1	2	3	1	1
NPx	0	0	0	2	0	1	0
Fd	5	1	1	5	0	1	1
Ulcv	0	1	1	0	0	0	0
WT.h.	52.3	16.5	67.1	21.2	38.5	22.0	31



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

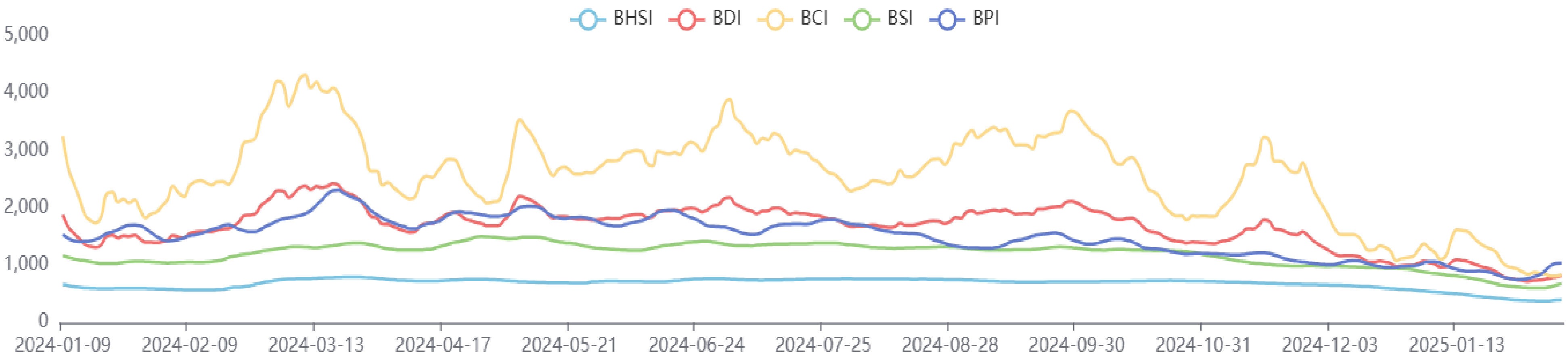
Type	M	T	W	Th	F	Sat	Sun
BDI	901	988	1029	1035			
VLSF	566.50	569.50	562.50	561.50			
A.SP	11.63	11.61	11.54	11.62	11.62	11.51	



第三部分 航运市场 SHIPPING MARKET

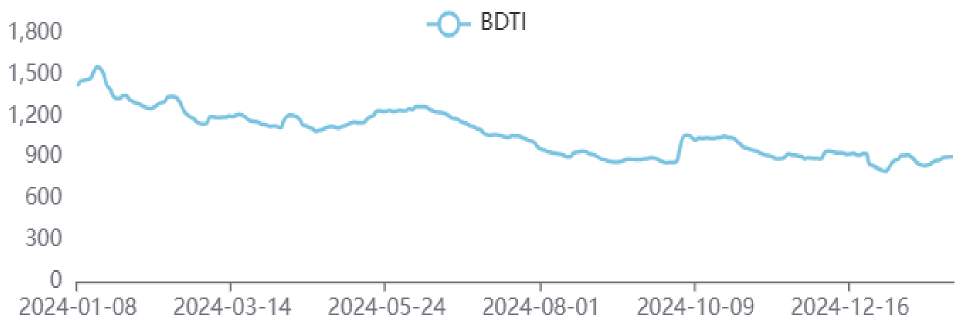
波罗的海干散货指数Baltic Dry Index

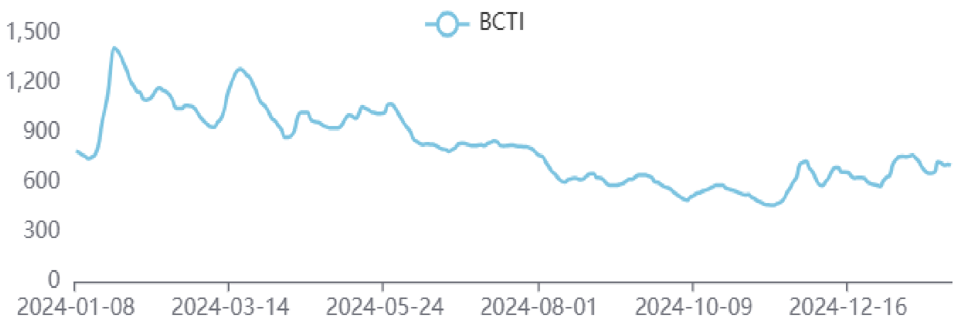
Type	PI	WoW	W%	M%	y%
BDI	815	80.0	10.88	-22.23	-45.19
BCI	840	-34.0	-3.89	-41.99	-62.88
BPI	1035	235.0	29.38	8.6	-28.37
BSI	677	74.0	12.27	-17.34	-35.34
BHSI	398	21.0	5.57	-21.65	-30.66

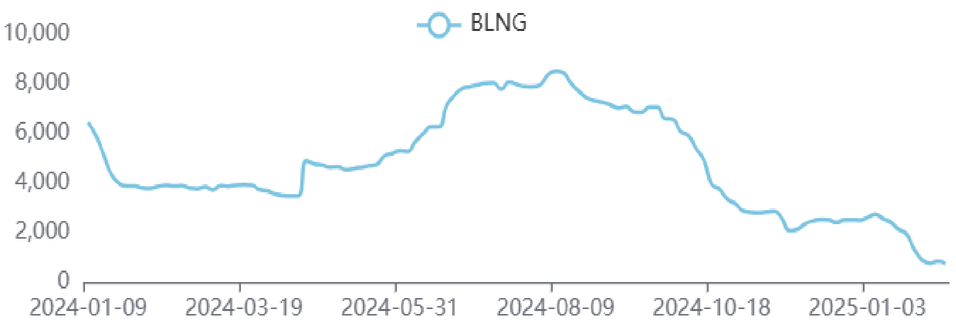


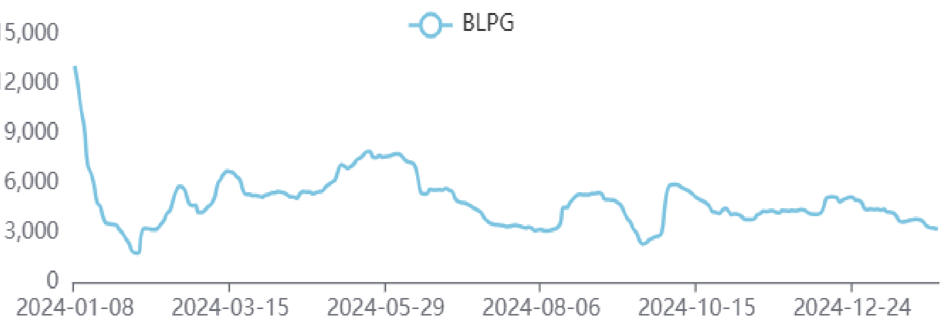
能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	903	27.0	3.08	9.99	-27.99
BCTI	700	38.0	5.74	11.29	-36.19
BLNG	735	-22.0	-2.91	-71.07	-80.93
BLPG	3185	-525.0	-14.15	-27.3	-2.06

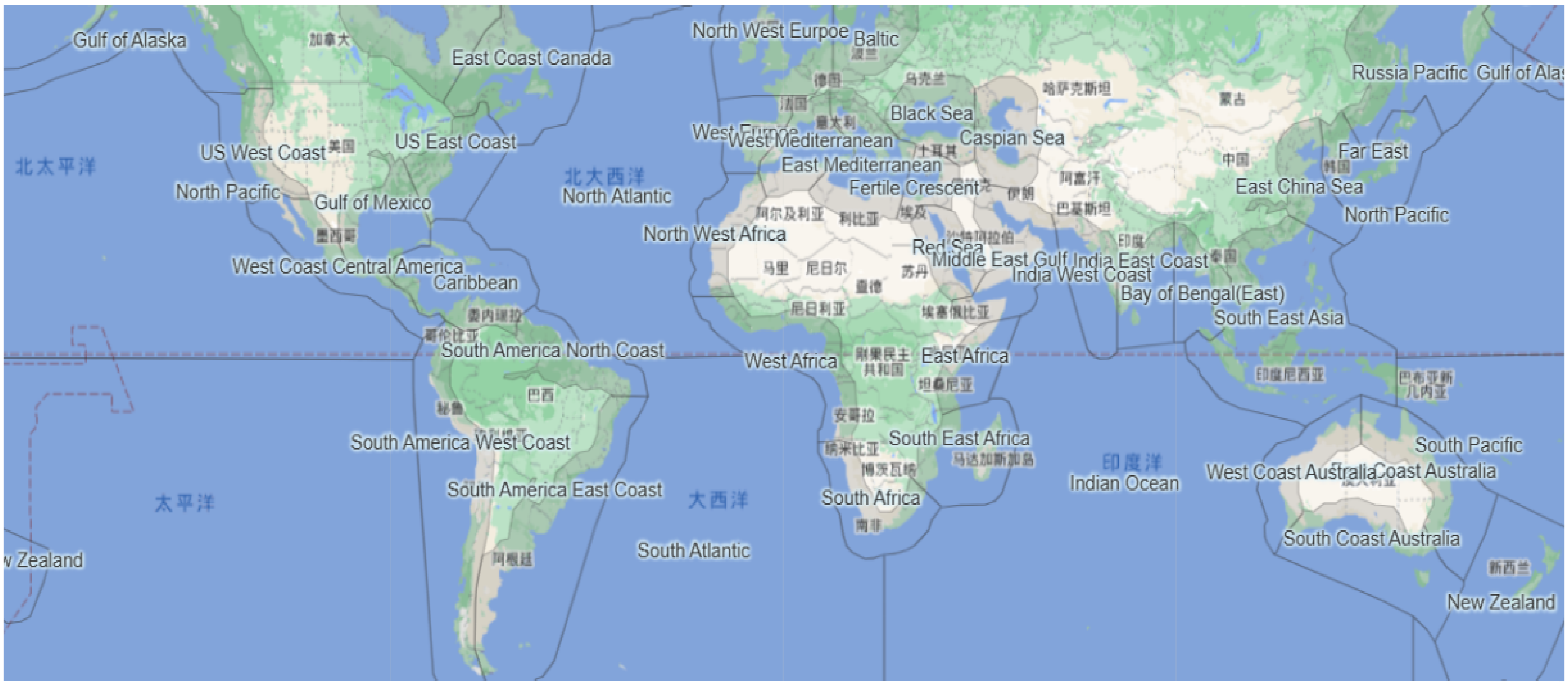








第四部分 运力分布 SUPPLY DISTRIBUTION

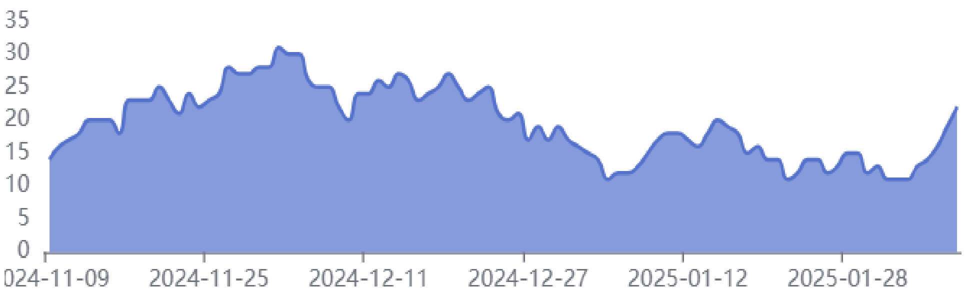


好望角型散货船 Capesize

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.

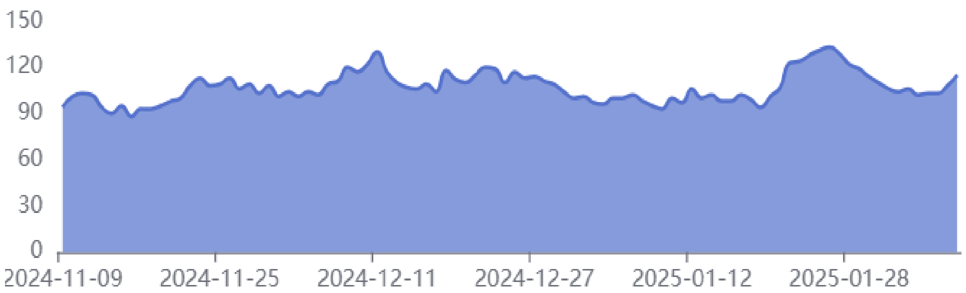
Type	M	T	W	Th	F	Sat	Sun
Cape	11	11	13	14	16	19	22



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.

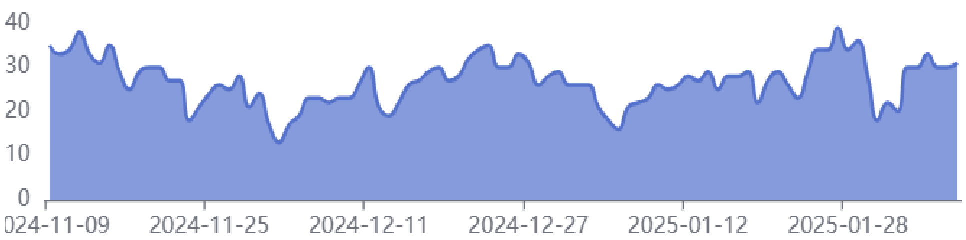
Type	M	T	W	Th	F	Sat	Sun
Cape	104	106	102	103	103	108	115



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	20	30	30	33	30	30	31

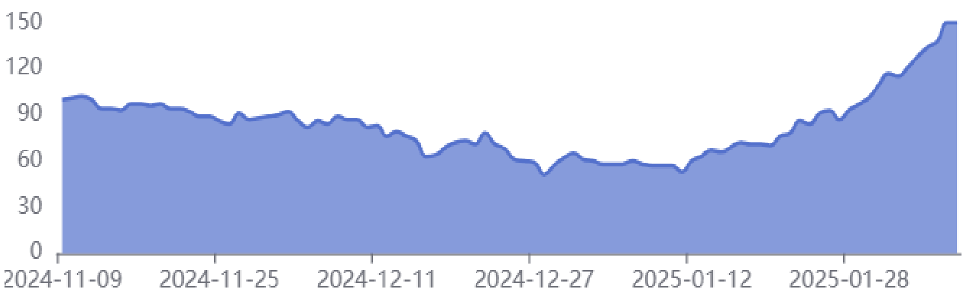


巴拿马型散货船 PANAMAX

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.

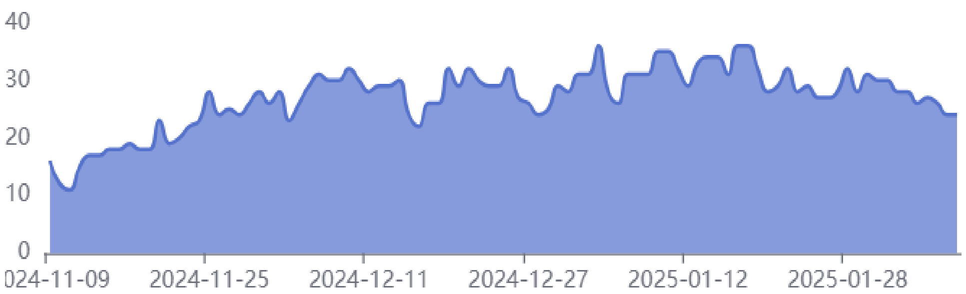
Type	M	T	W	Th	F	Sat	Sun
Pan.	115	121	128	134	138	150	150



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.

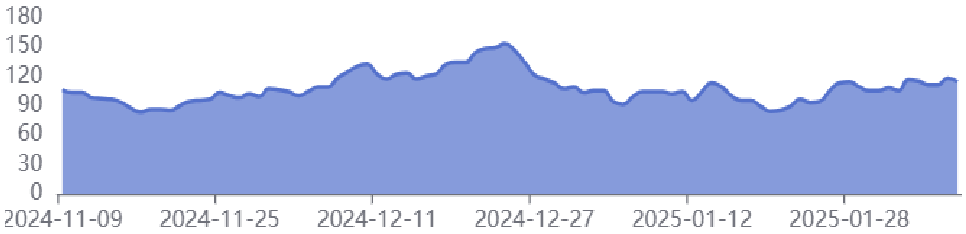
Type	M	T	W	Th	F	Sat	Sun
Pan.	13	12	13	14	14	17	19



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.	105	116	115	111	111	118	114

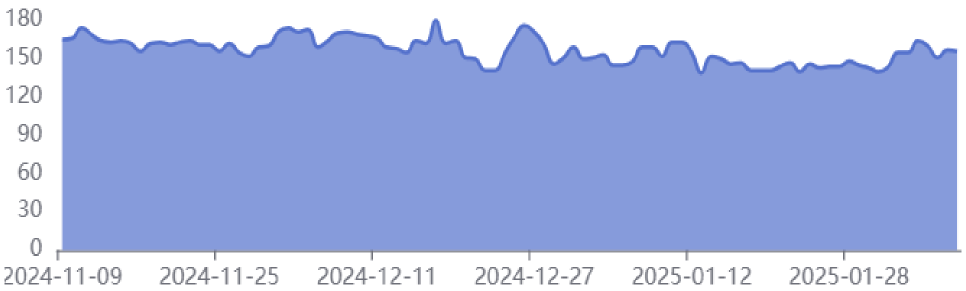


超大灵便型散货 SUPRAMAX

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.

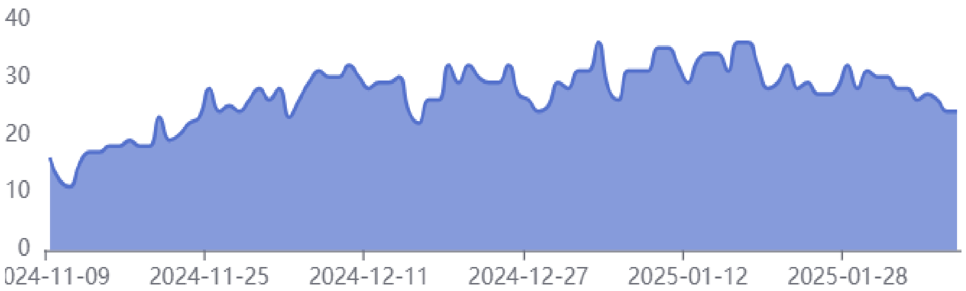
Type	M	T	W	Th	F	Sat	Sun
SMX	154	154	163	159	150	156	155



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.

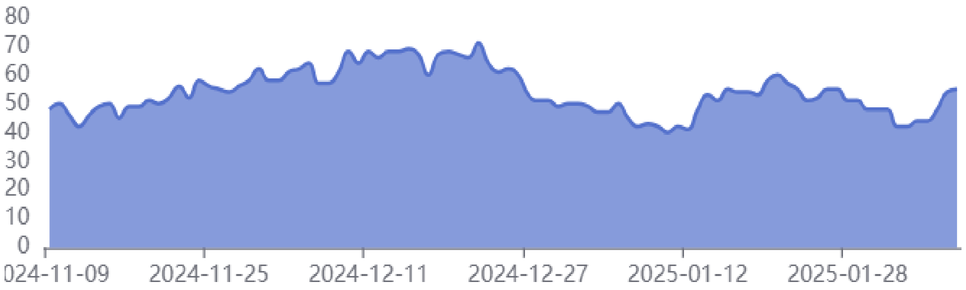
Type	M	T	W	Th	F	Sat	Sun
SMX	28	28	26	27	26	24	24



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.

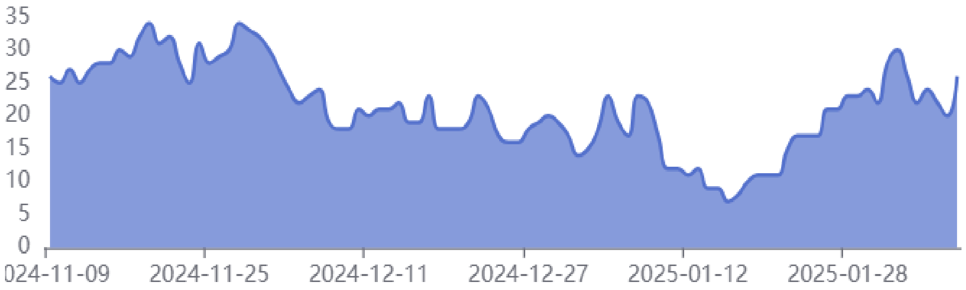
Type	M	T	W	Th	F	Sat	Sun
SMX	30	26	22	24	22	20	26



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.

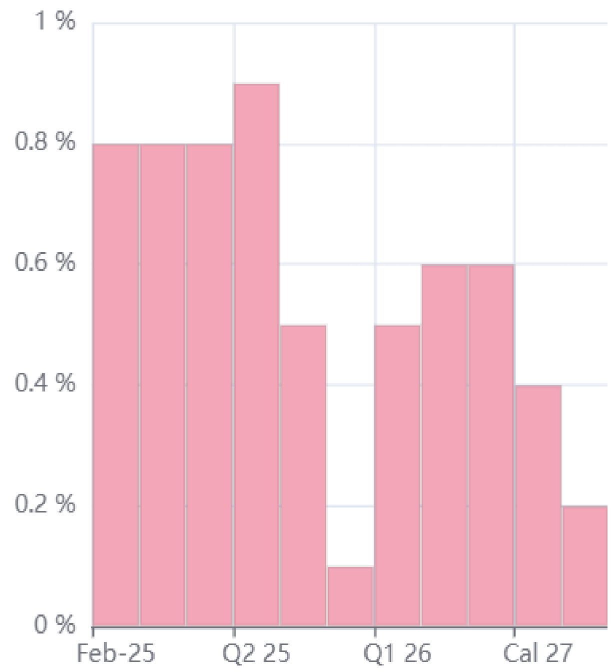
Type	M	T	W	Th	F	Sat	Sun
SMX	42	42	44	44	48	54	55

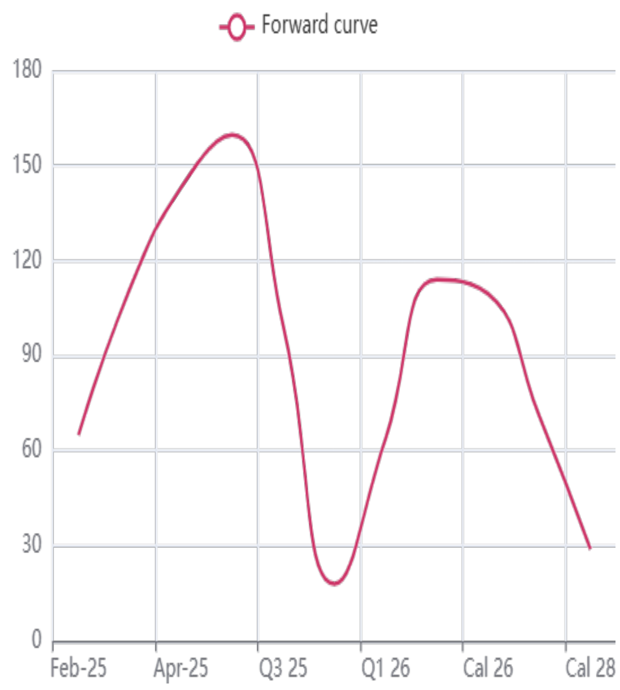


第五部分 远期运价协议 FFA

好望角型散货船Capesize

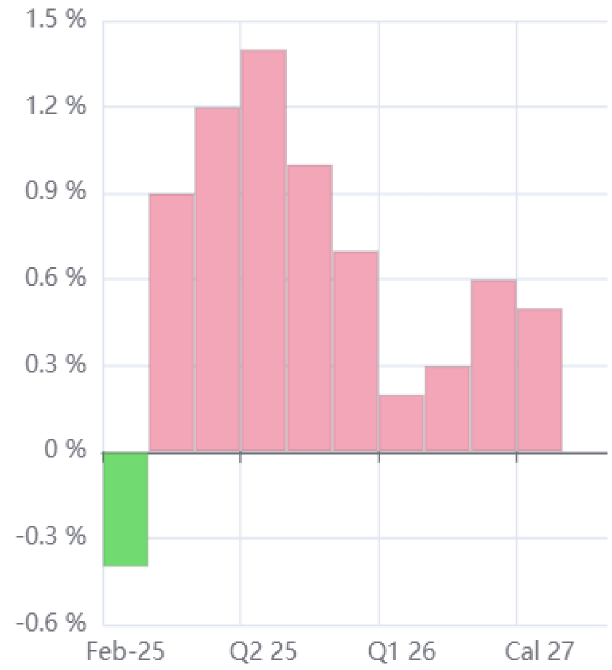
5TC	$/day	WoW	
Feb-25	8,404.00	65.0	0.8 %
Mar-25	13,518.00	111.0	0.8 %
Apr-25	17,039.00	143.0	0.8 %
Q2 25	18,136.67	159.67	0.9 %
Q3 25	20,617.67	99.33	0.5 %
Q4 25	21,450.00	18.0	0.1 %
Q1 26	12,314.00	64.0	0.5 %
Q2 26	17,721.00	114.0	0.6 %
Cal 26	18,445.75	109.5	0.6 %
Cal 27	18,521.00	71.0	0.4 %
Cal 28	18,500.00	29.0	0.2 %

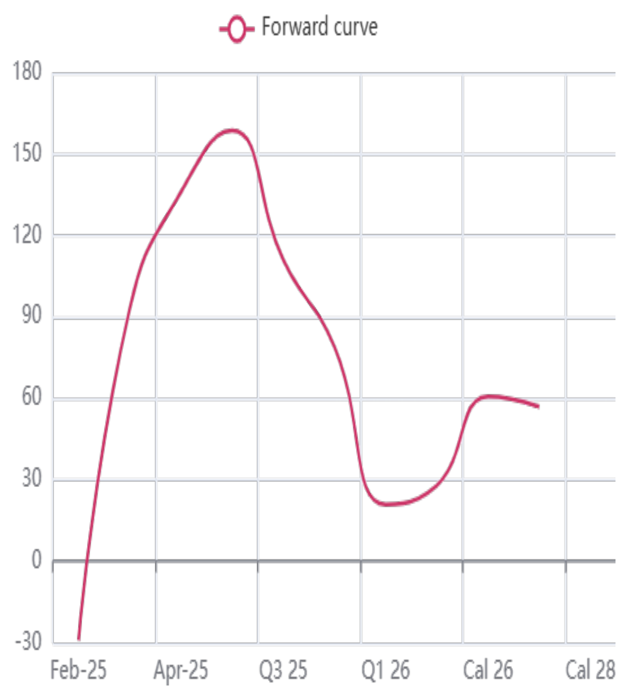




巴拿马型散货船Panamax

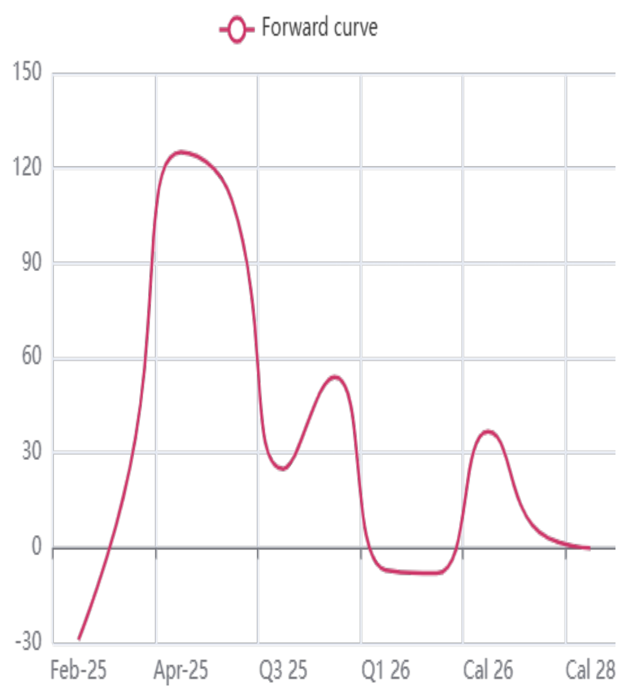
4TC	$/day	WoW	
Feb-25	8,089.00	-29.0	-0.4 %
Mar-25	10,129.00	93.0	0.9 %
Apr-25	11,200.00	136.0	1.2 %
Q2 25	11,418.00	158.67	1.4 %
Q3 25	11,450.00	111.0	1.0 %
Q4 25	11,029.00	79.0	0.7 %
Q1 26	9,464.00	21.0	0.2 %
Q2 26	10,896.00	28.0	0.3 %
Cal 26	10,775.00	60.75	0.6 %
Cal 27	10,925.00	57.0	0.5 %
Cal 28	-	-	-





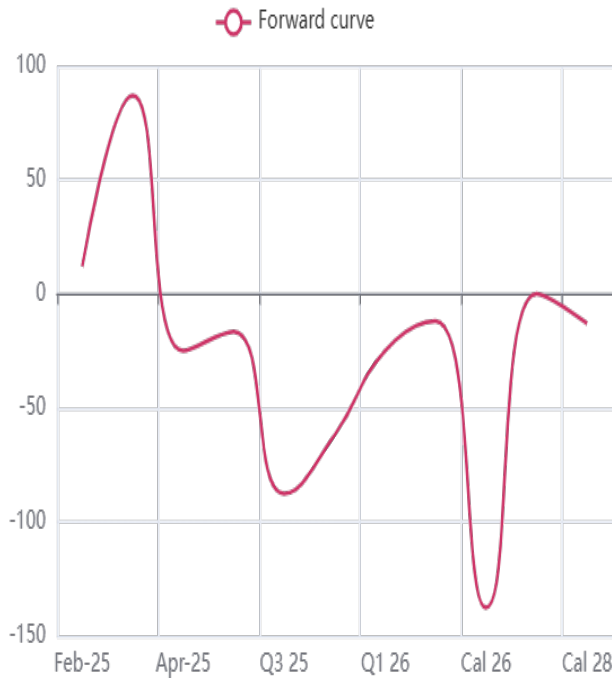
超大灵便型散货船Supramax

10TC	$/day	WoW	
Feb-25	7,379.00	-29.0	-0.4 %
Mar-25	10,167.00	25.0	0.2 %
Apr-25	11,183.00	125.0	1.1 %
Q2 25	11,501.33	109.67	1.0 %
Q3 25	11,721.33	25.0	0.2 %
Q4 25	11,279.00	54.0	0.5 %
Q1 26	9,626.00	-7.0	-0.1 %
Q2 26	10,075.00	-8.0	-0.1 %
11,074.75	Cal 26	36.75	0.3 %
Cal 27	11,188.00	5.0	0.0 %
Cal 28	11,250.00	0.0	0.0 %



灵便型散货船Handysize

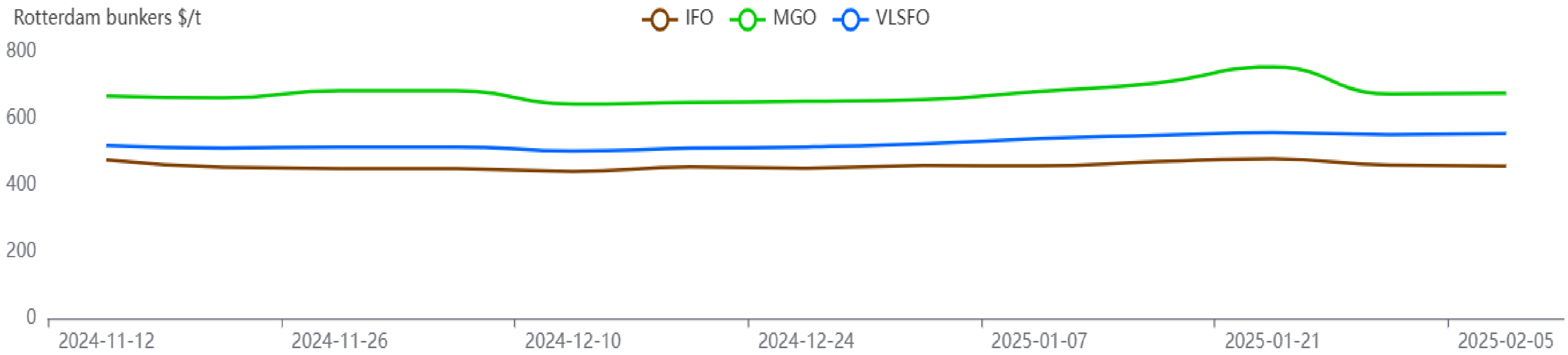
7TC	$/day	WoW	
Feb-25	7,925.00	12.0	0.2 %
Mar-25	9,825.00	87.0	0.9 %
Apr-25	10,825.00	-25.0	-0.2 %
Q2 25	11,142.00	-16.67	-0.1 %
Q3 25	11,225.00	-87.67	-0.8 %
Q4 25	10,963.00	-62.0	-0.6 %
Q1 26	9,463.00	-25.0	-25.0
Q2 26	9,938.00	-12.0	-0.1 %
Cal 26	10,600.25	-137.75	-1.3 %
Cal 27	10,675.00	0.0	0.0 %
Cal 28	10,775.00	-13.0	-0.1 %

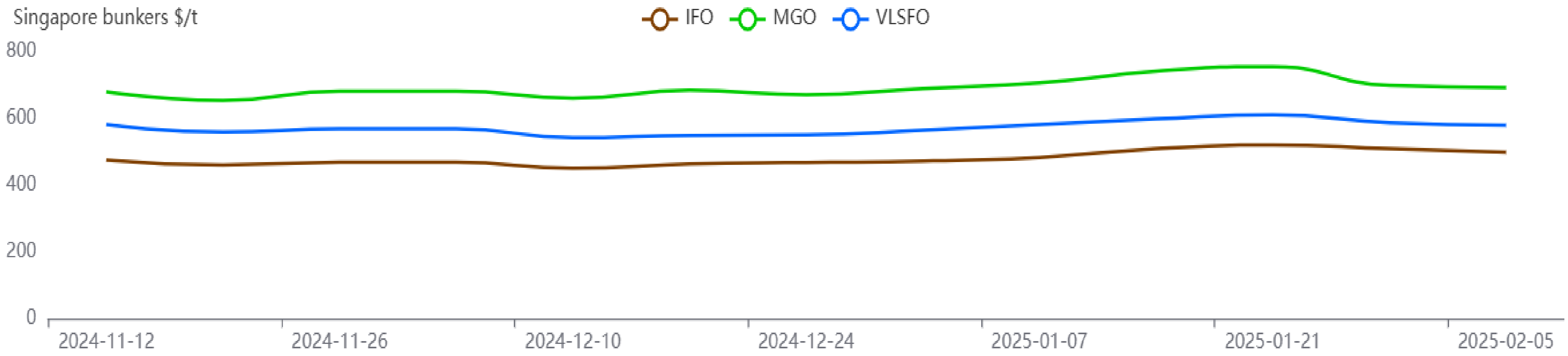


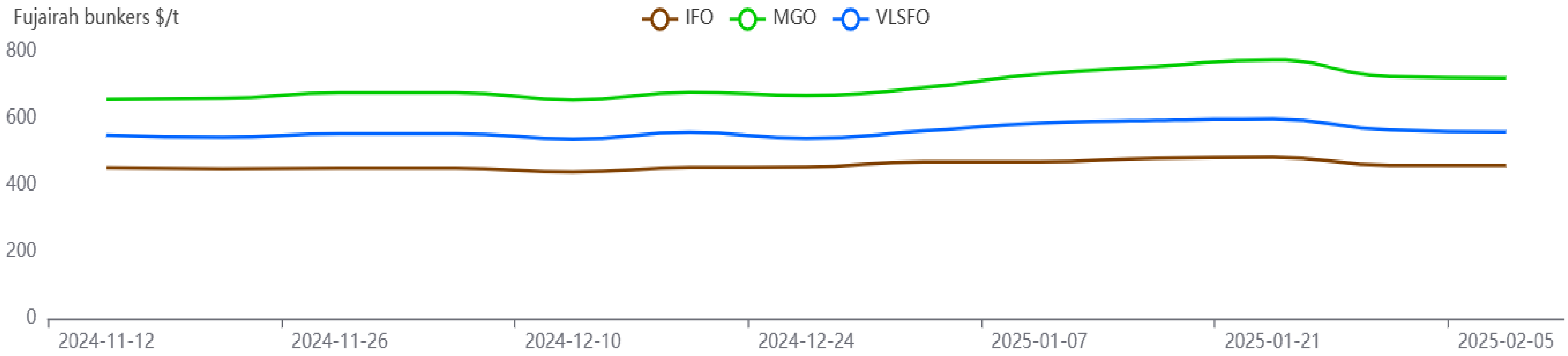
第六部分 燃油价格 BUNKER PRICE

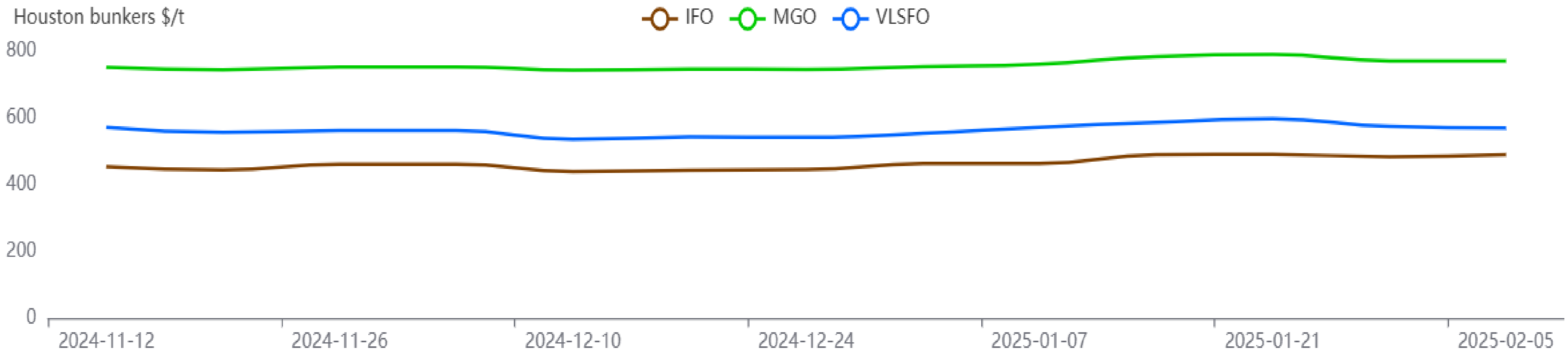
MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	589.0	523.0	739.0	66.0	6.5	10.92	-27.47
Singapore	580.0	499.5	693.5	80.5	2.0	2.55	-18.69
Rotterdam	555.5	457.5	677.5	98.0	6.5	7.1	18.79
Fujairah	559.5	459.5	722.0	100.0	-6.0	-5.66	-14.16
Houston	570.5	491.0	772.0	79.5	-11.5	-12.64	-27.06

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





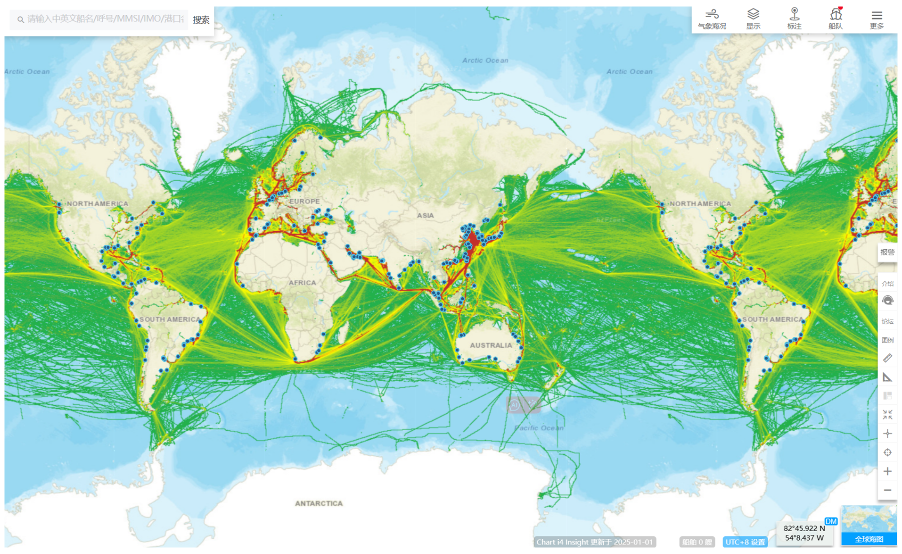




第七部分 最新商品价格 LATEST COMMODITIES PRICE

Grains and Oilseeds		Index	+/-	Weekly	Monthly	YTD
Wheat		222.0	18.0	8.82	12.12	2.78
Maize		241.0	1.0	0.42	5.7	17.56
Soybeans		206.0	2.0	0.98	2.49	-5.94
Rice		192.0	-1.0	-0.52	-5.88	-27.27
Barley		231.0	-2.0	-0.86	4.05	6.94
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	72.41	-0.12	-0.17	-5.43	0.72
Brent	USD/Bbl	75.75	0.08	0.11	-5.03	-1.61
Natural Gas	USD/MMBtu	3.2	0.16	5.26	-19.8	53.11
Gasoline	USD/Gal	2.09	0.0	0.0	0.97	-2.34
Heating Oil	USD/Gal	2.42	-0.02	-0.82	-3.2	-9.36
Ethanol	USD/Gal	1.79	0.02	1.13	6.55	13.29
Naphtha	USD/T	648.69	-0.94	-0.14	0.19	4.59
Propane	USD/Gal	0.91	0.01	1.11	4.6	-1.09
Uranium	USD/Lbs	71.1	-0.25	-0.35	-3.33	-28.9
Methanol	CNY/T	2610.0	31.0	1.2	-1.77	3.69
TTF Gas	EUR/MWh	53.03	-0.63	-1.17	16.7	81.92
UK Gas	GBp/thm	128.97	-2.07	-1.58	13.23	81.65
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.36	0.11	2.59	1.16	14.44
Coal	USD/T	112.5	-4.4	-3.76	-2.81	-3.02
Steel	CNY/T	3258.0	-48.0	-1.45	3.82	-16.07
Iron Ore	USD/T	105.4	3.81	3.75	7.45	-19.23
Aluminum	USD/T	2618.05	22.75	0.88	1.81	17.53
Lithium	CNY/T	77650.0	-150.0	-0.19	2.58	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2868.2	71.04	2.54	6.8	41.75
Silver	USD/t.oz	32.43	1.15	3.68	6.75	44.78
Platium	null	1005.3	-27.2	-2.63	2.89	N/A
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.04	0.0	0.0	1.96	-3.7
USD/CNY		7.28	-0.04	-0.55	-1.09	0.83

第八部分 本周话题 WEEKLY TOPIC



HIFLEET 2024干散货海运数据统计

2024年波罗的海干散货运价指数BDI全年均值为1749，同比2023年上涨27%；其中海岬型运价指数BCI全年均值为2712，同比上涨38%；巴拿马型运价指数BPI全年均值为1564点，同比上涨9%；超灵便型船运价指数BSI全年均值为1240点，同比上涨21%。

2024年，全球铁矿石发运16.18亿吨（不包括混矿转口），同比增长2.6%；其中，澳大利亚铁矿发运量约9.65亿吨，与2023年同期增长2000万吨，增幅2%；巴西铁矿发运3.86亿吨，同比增加3000万吨，增幅为8%。同年中国铁矿石海运到港总量为12.44亿吨，同比增长4000万吨，增幅3%；其中五月份进口同比增长10%，增幅最大。

2024年全球煤炭海运发运量13亿吨，相较于2023年基本持平；其中印尼发运4.64亿吨，同比增长3%，澳洲发运3.55亿吨，同比小幅减少300万吨，俄罗斯发运1.59亿吨，同比降幅达10%，主要问题在于俄境内东向铁路运力受限。同年，我国海运进口煤炭共计4.37亿吨，同比增长24%；从海运进口来源看，从印尼进口量 2.24 亿吨，同比上涨 4300万吨，从澳大利亚进口 8200万吨，同比大幅上涨 47%，来自俄罗斯的海运煤炭6900 万吨，同比下滑 6%.

2024年铝土矿海运发运量1.9亿吨，其中几内亚发运1.32亿吨；我国铝土矿海运进口量同比大幅增长12%至1.58亿吨，占据了全球铝土矿海运贸易量的83%.

2024年全球散粮海运发运量4.31亿吨，较2023年同期增加15%；其中巴西发运1.59亿吨，同比减少5%，主要原因是历史性干旱制约了巴西内河驳船的营运效率；美国散粮海运发运1.01亿吨，同比增长23%。我国2024年散粮海运进口量共计1.54亿吨，比2023年同期上涨16%；虽受到干旱影响，我国从巴西进口的散粮却增长1450万吨，占我国散粮海运进口增量的68%，这得益于巴西已成为中国最大的玉米进口来源。

2024年，海岬型、巴拿马型、大灵便型和灵便型的空载航速均值分别为 11.14节、11.25节、11.31节和11.10 节，同比2023年分别回落 1.5%、3.1%、2.7%和2.4%；大型船舶空载航速继续低位运行，且小幅回落；进入2024下半年后，各船型船队平均空载航速继续回落，其中巴拿马型船队尤其明显。

根据HIFLEET压港数据，综合煤炭、铁矿和粮食的主要出口区域（澳洲、巴西、美湾和印尼）的船舶压港数据进行分析，2024全年整体拥堵情况比2023同期整体改善，且全年压港水平处于平稳态势。从这四个港口群的等待时间上来看，干散货船（海岬型+巴拿马型+大灵便型）的日均等待时间137个小时，较2023年日均等待时间150小时，减少了13小时。 中国港口2024年压港情况同样好转，其干散货船队（海岬型+巴拿马型+大灵便型）规模日均295条，同比2023年回落14%（包含台风来袭时，港口要求所有中大型船舶出港避风的情况；2024年西北太平洋台风出现次数高达30次，比2023年多了10次）。

2024年，中国铁矿石进口两条主干航线，船舶重载周期均有小幅度延长，且进入三季度后，海岬型船队有明显的降速操作。中国煤炭进口两条主干航线，船舶重载周期均有缩短一天时间，但东澳回国航线航次周期相对平稳，而印尼回国航线航次周期在2024年波动幅度更为宽泛。散粮进口主干航线巴西-中国的船舶重载周期持续平稳；而美湾-中国航线的船舶重载周期受巴拿马运河通航条件影响，较2023年延长了4天。

The Baltic Dry Index BDI in 2024 averaged at 1749 for the whole year in 2024, up 27% compared with 2023; The average of the Capesize index BCI for the year was 2712, up 38% year on year; The Panamax Index BPI averaged 1564 points, up 9% year on year; The BSI average for 2024 was 1240 points, up 21% year on year.

In 2024, the world shipped 1.618 billion tons of iron ore (excluding mixed ore re-exports), an increase of 2.6%. Among them, Australian iron ore shipments were about 965 million tons, an increase of 20 million tons, or 2%, compared with the same period in 2023; Brazilian iron ore shipments were 386m tonnes, up 30m tonnes, or 8 per cent. In the same year, the total amount of Chinese iron ore shipped to the port by sea was 1.244 billion tons, an increase of 40 million tons, or 3%. The biggest increase was in May, when imports rose 10% from a year earlier.

In 2024, the global shipping volume of coal will be 1.3 billion tons, which is basically the same as that in 2023. Among them, Indonesia shipped 464 million tons, an increase of 3%, Australia shipped 355 million tons, a slight decrease of 3 million tons, Russia shipped 159 million tons, a decrease of 10%, the main problem is that Russia's east-bound railway capacity is limited. In the same year, China imported 437 million tons of coal by sea, an increase of 24%. From the perspective of seaborne import sources, imports from Indonesia were 224 million tons, up 43 million tons year-on-year, imports from Australia were 82 million tons, up 47% year-on-year, and seaborne coal from Russia was 69 million tons, down 6% year-on-year. In 2024, 190 million tons of bauxite have been shipped by sea, of which 132 million tons shipped by Guinea. China's bauxite seaborne imports increased significantly by 12% year-on-year to 158 million tons, accounting for 83% of the global bauxite seaborne trade volume. In 2024, the global shipping volume of bulk grain is 431 million tons, an increase of 15% over the same period in 2023; Brazil shipped 159 million tons, a decrease of 5%, mainly due to the historic drought restricting the efficiency of Brazilian inland barge operations; The US shipped 101m tonnes of bulk grain by sea, up 23 per cent from a year earlier. China's bulk grain seaborne imports in 2024 totaled 154 million tons, an increase of 16% over the same period in 2023; Although affected by the drought, China's import of bulk grain from Brazil increased by 14.5 million tons, accounting for 68% of the increase in China's bulk grain imports by sea, which is thanks to Brazil has become China's largest source of corn imports.

In 2024, the average ballast speed of Capes, Panamax, Supramax and handysize are 11.14 knots, 11.25 knots, 11.31 knots and 11.10 knots respectively, down 1.5%, 3.1%, 2.7% and 2.4% compared with 2023, respectively. The ballast speed of large ships continued to operate at a low level, and decreased slightly; After entering the second half of 2024, the average ballast speed of each ship type fleet continued to decline, especially the Panamax fleet.

According to HIFLEET's port congestion data, based on the analysis of the ship congestion data of the main export regions of coal, iron ore and grain (Australia, Brazil, the United States Gulf and Indonesia), the overall congestion situation in 2024 is improved compared with the same period in 2023, and the annual port compaction level is stable. From the point of view of the waiting time of these four port groups, the average daily waiting time of dry bulk carriers (Capesize + Panamax + Supramax) is 137 hours, which is 13 hours less than the average daily waiting time of 150 hours in 2023. The situation of China's port pressure in 2024 also improved, and its dry bulk cargo fleet (Capesize + Panamax + Supramax) has an average daily number of 295, down 14% compared with 2023 (including the situation that all medium and large ships are required to leave the port for shelter when typhoon hit; In 2024, there were 30 typhoons in the Northwest Pacific, 10 more than in 2023).

In 2024, the two main routes for China's iron ore imports have a small extension of the voyage cycle, and after entering the third quarter, the Capesize has a significant speed reduce operation. The two main routes of China's coal import have shortened the voyage cycle by one day, but the voyage of the East Australia return route is relatively stable, and the voyage of the Indonesia return route is more volatile in 2024. Bulk grain import main route Brazil - China ship voyage period maintain stable; The voyage of the US-China route is affected by the navigation conditions of the Panama Canal, which has been extended by 4 days compared with 2023.