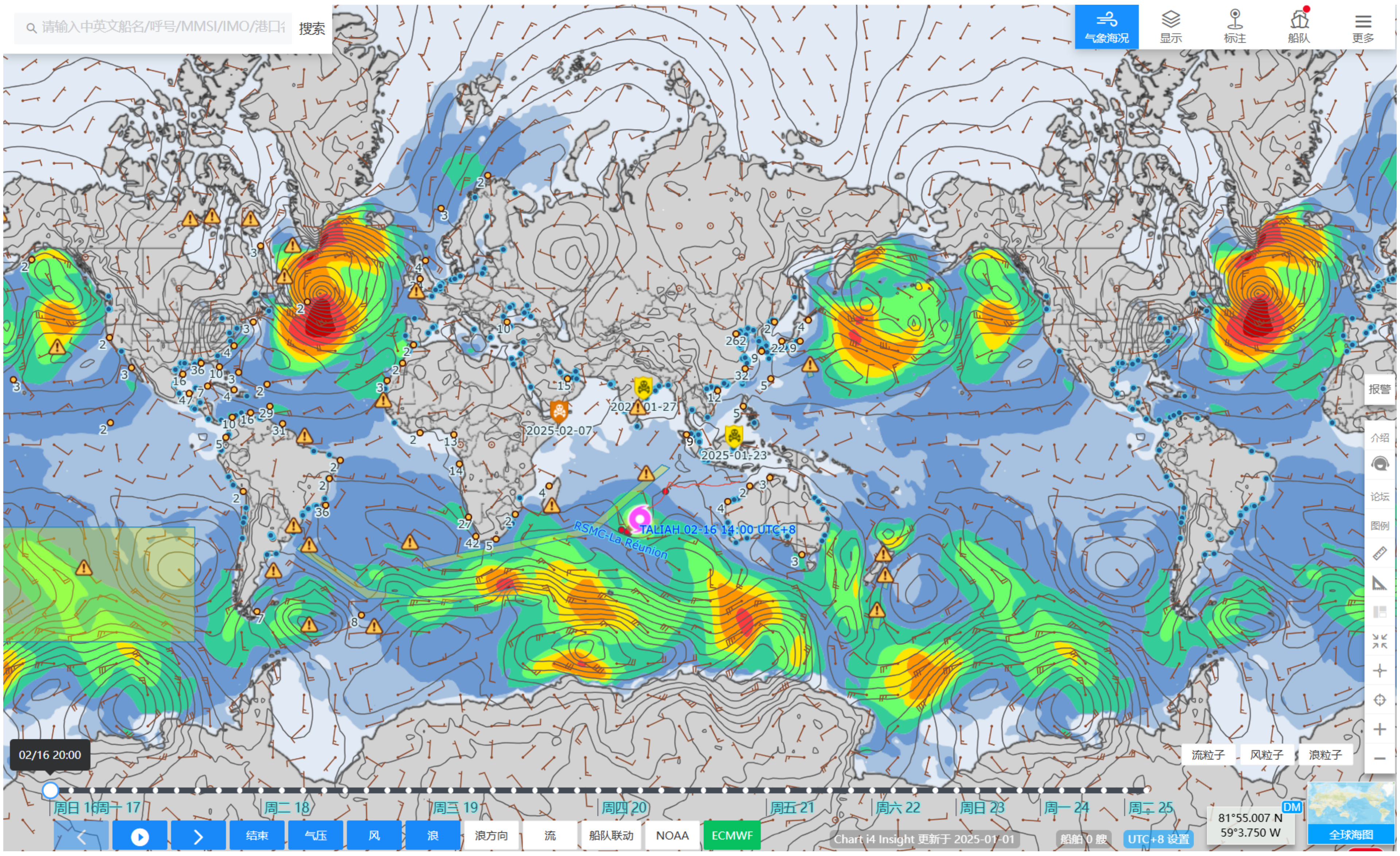
# 2025年
# 第7周市场周报

## 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872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 872 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5-3级，减弱，轻浪；黄海风力5-4级，减弱，有中浪；东海风力4-6级，增强，有中浪；台湾海峡6-7级风，风力增强，有大浪；南海大部海域风力5-6级，有大浪。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 become weak from fresh to gentle with slight sea. Yellow Sea will become weak as well with moderate sea. And China East Sea will become strong with moderate sea. The wind in the Taiwan Strait will become strong from fresh to near gale with rough sea. In most of the South China Sea the wind stay strong with rough sea. The low pressure activities become frequent both in North of Pacific and Atlantic.

## 海盗事件 Piracy

2月7号，索马里埃尔东南约6海里。六人登上并劫持了一艘独桅帆船，并将包括一名索马里警卫在内的船员扣为人质，这名警卫后来被释放，当局正在调查这一事件。。07.02.2025: Night Hours: Posn: 07:54N – 049:56E, Around 6nm SE of Eyl, Somalia. Six persons boarded and hijacked a dhow and took its crew including a Somali guard, hostage. The guard was later released. Authorities are investigating the incident.

## 海上事件 Marine Incidents

2月8号，一艘56,700载重吨的“安洋2”轮（2010年建造）上周六晚些时候搁浅在俄罗斯岛屿南端的涅夫斯基区（Nevelsky）的一个沙洲上，与日本隔海相望。On Feb. 8, one 56,700 DWT Anyang 2, built in 2010, ran aground late Saturday on a sandbank in the Nevelsky district at the southern tip of the Russian island, across the sea from Japan.

## 其它 Others

没有 Nil

## 备注 Remark

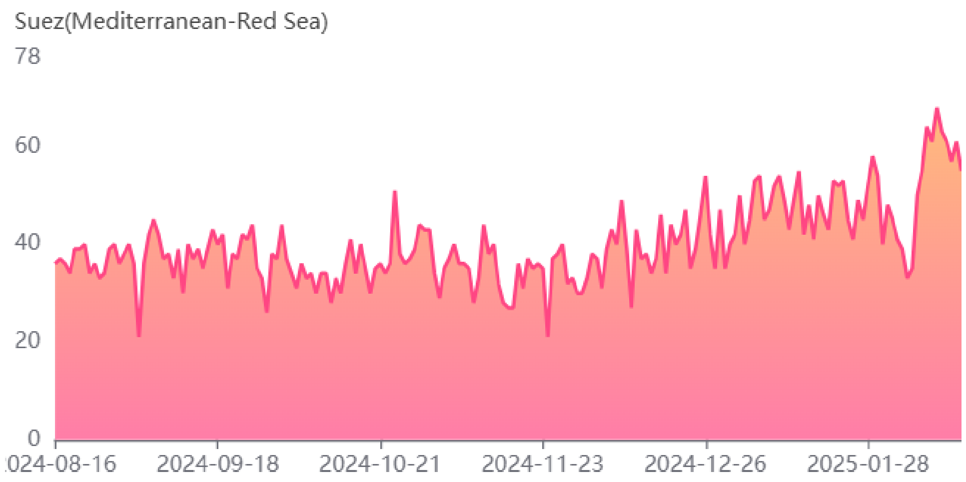
本报告数据截止时间为2025年2月16日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。 The data deadline for this report is Beijing time 17 hours on Feb 16th of 2025; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

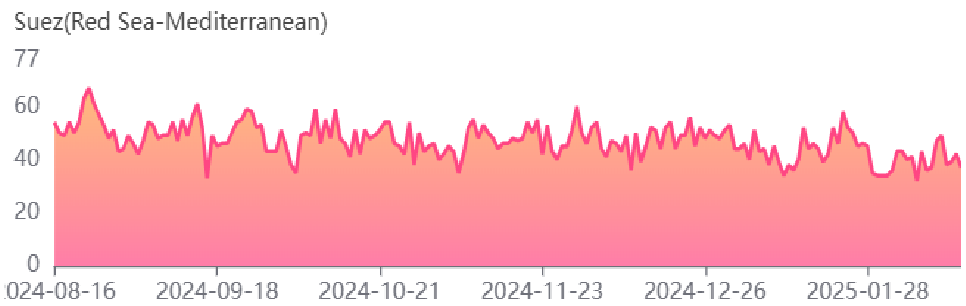
# 第二部分 航运数据 SHIPPING DATA

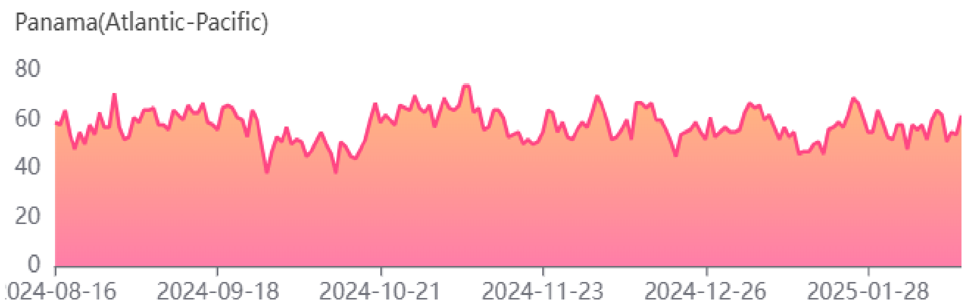
最近一周船舶运河/河口锚地等待数量

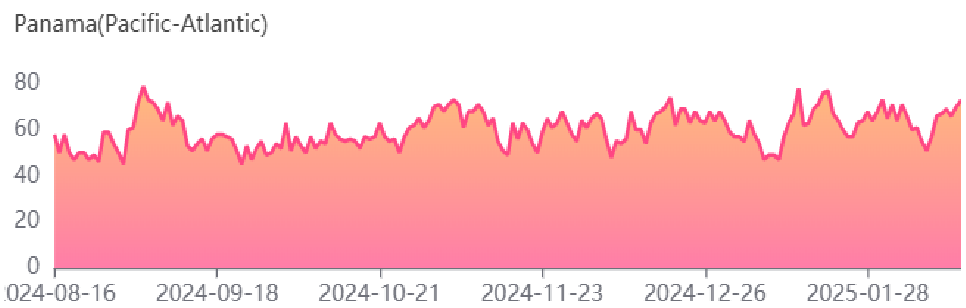
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

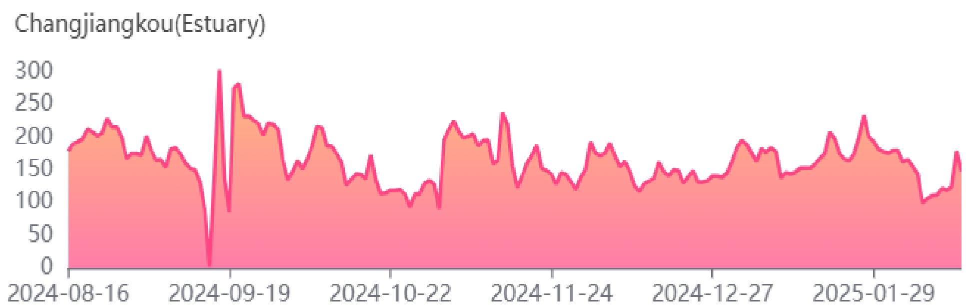
| Canal/Riv. | P.N. | M.N. | WoW | MoM |
|---|---|---|---|---|
| Suez.Red | 37 | 1215 | 11 | -94 |
| Miss.Riv. | 3 | 230 | -34 | 67 |
| CJK | 148 | 4736 | -172 | 155 |
| Pa.Atlan. | 62 | 1668 | 20 | 55 |
| Colum.Riv. | 7 | 170 | -2 | 44 |
| Suez.Med. | 55 | 1467 | 128 | 142 |
| Pa.Pac. | 73 | 1890 | 20 | 97 |
| ZJK | 50 | 3421 | -444 | 677 |

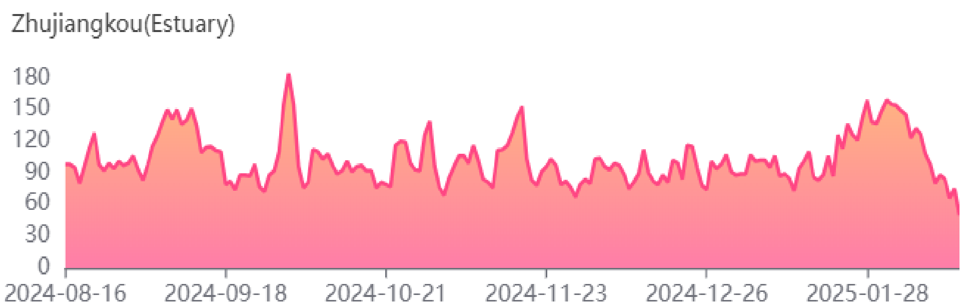


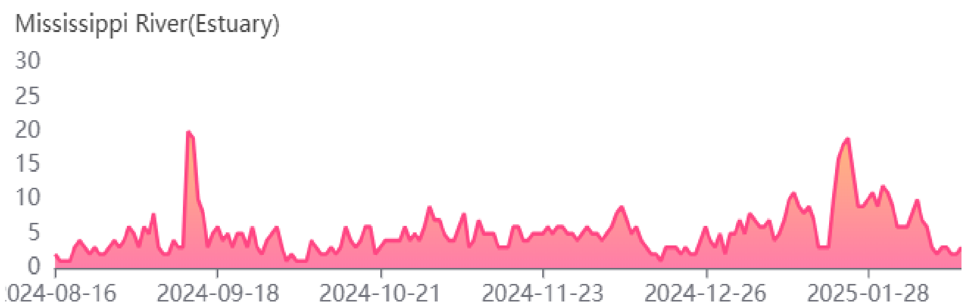



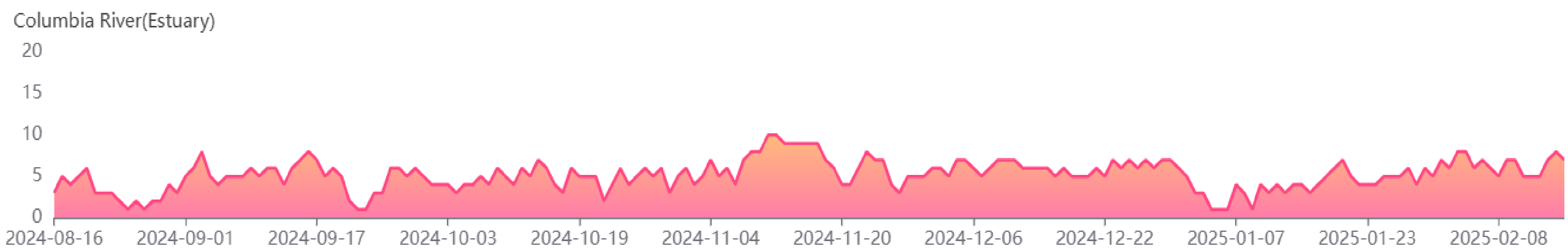



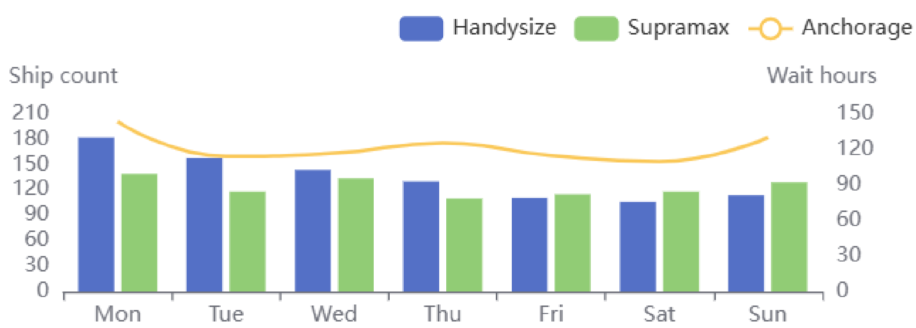




(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

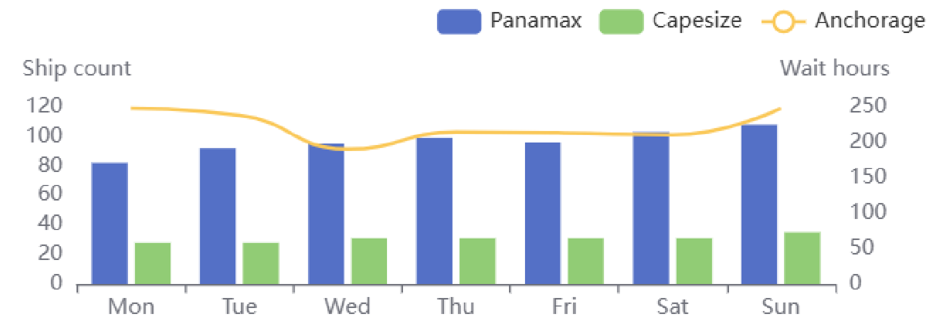
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| HDY | 182 | 158 | 144 | 130 | 111 | 106 | 114 |
| SMX | 139 | 118 | 134 | 110 | 115 | 118 | 129 |
| WT.h. | 143.5 | 114.3 | 116.9 | 125.3 | 114.9 | 109.85 | 130 |



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

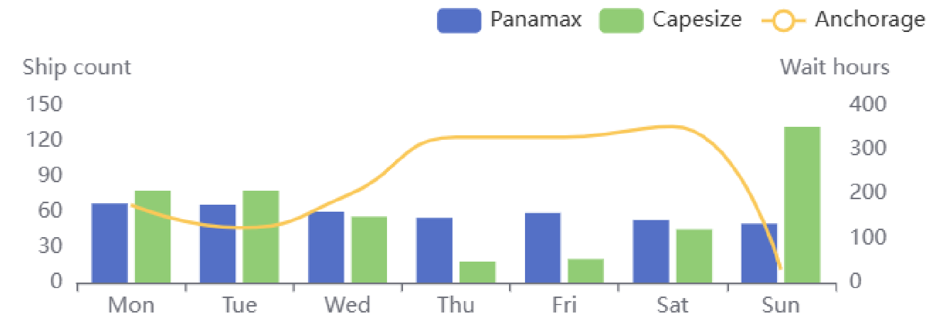
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| Pan. | 82 | 92 | 95 | 99 | 96 | 103 | 108 |
| Cap | 28 | 28 | 31 | 31 | 31 | 31 | 35 |
| WT.h. | 247.9 | 238.2 | 190.3 | 214.3 | 213.2 | 210.4 | 248 |




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

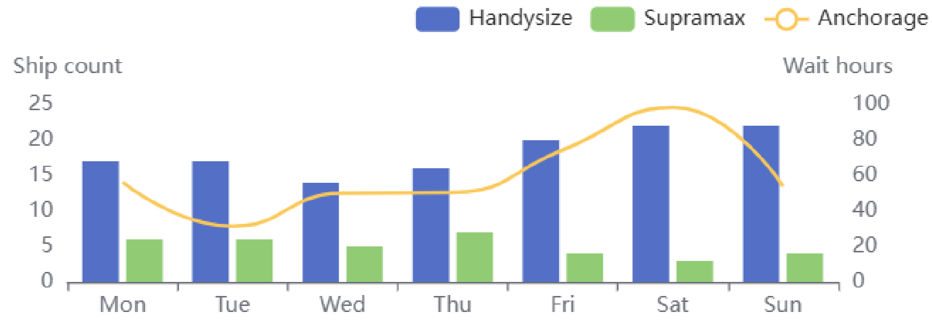
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| Pan. | 67 | 66 | 60 | 55 | 59 | 53 | 50 |
| Cap | 78 | 78 | 56 | 18 | 20 | 45 | 132 |
| WT.h. | 175.8 | 123.8 | 197.6 | 328.7 | 328.9 | 352.9 | 30 |




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

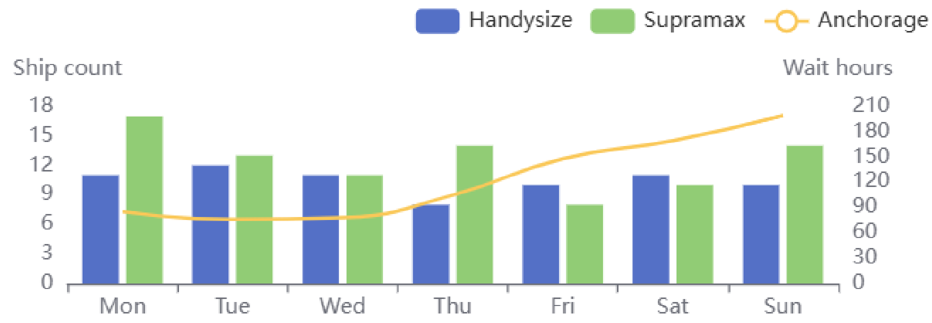
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| HDY | 17 | 17 | 14 | 16 | 20 | 22 | 22 |
| SMX | 6 | 6 | 5 | 7 | 4 | 3 | 4 |
| WT.h. | 56.3 | 31.4 | 50.1 | 50.4 | 74.4 | 98.4 | 54 |




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

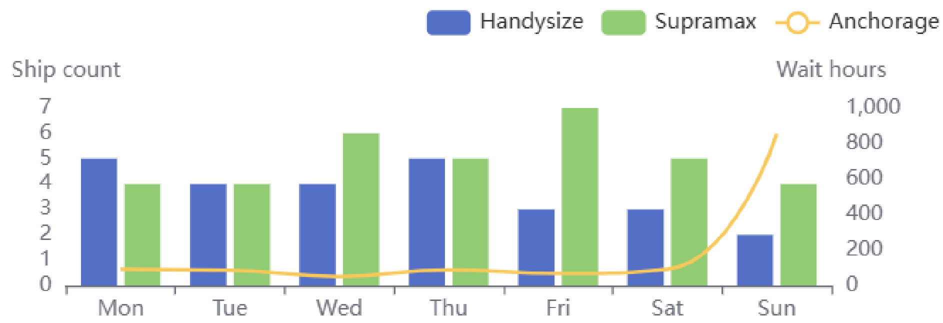
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| HDY | 11 | 12 | 11 | 8 | 10 | 11 | 10 |
| SMX | 17 | 13 | 11 | 14 | 8 | 10 | 14 |
| WT.h. | 85.15 | 75.9 | 78.1 | 104.8 | 147.9 | 169.3 | 199 |




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

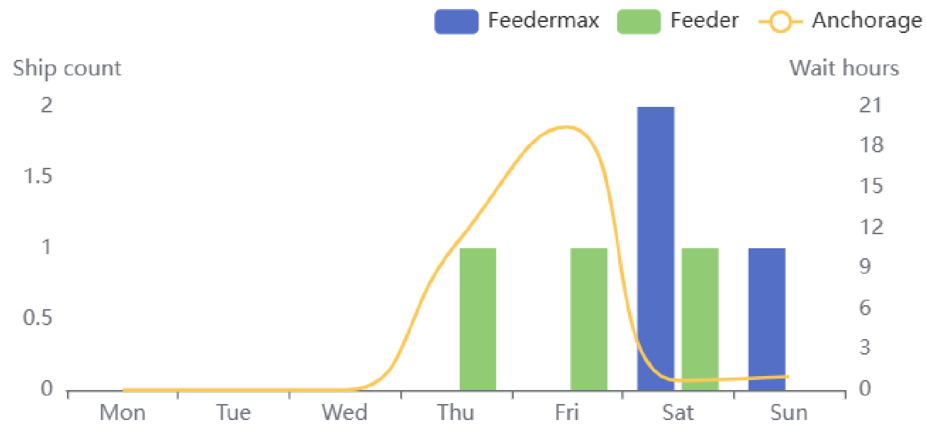
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| HDY | 5 | 4 | 4 | 5 | 3 | 3 | 2 |
| SMX | 4 | 4 | 6 | 5 | 7 | 5 | 4 |
| WT.h. | 91.3 | 86.6 | 50.8 | 87.75 | 67.7 | 91.7 | 854 |



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

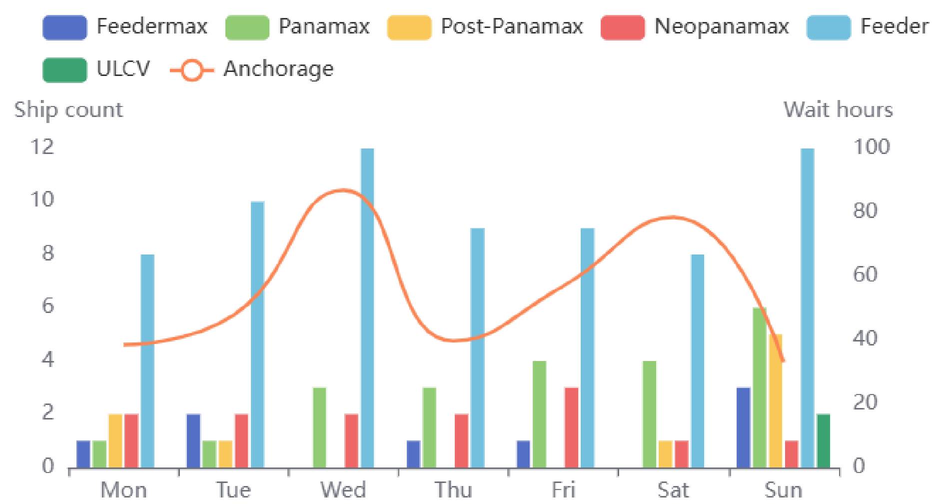
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| F.ma. | 0 | 0 | 0 | 0 | 0 | 2 | 1 |
| Pan. | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| PPx | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| NPx | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Fd | 0 | 0 | 0 | 1 | 1 | 1 | 0 |
| WT.h. | 0.0 | 0.0 | 0.0 | 10.8 | 19.5 | 0.7 | 1 |
| 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

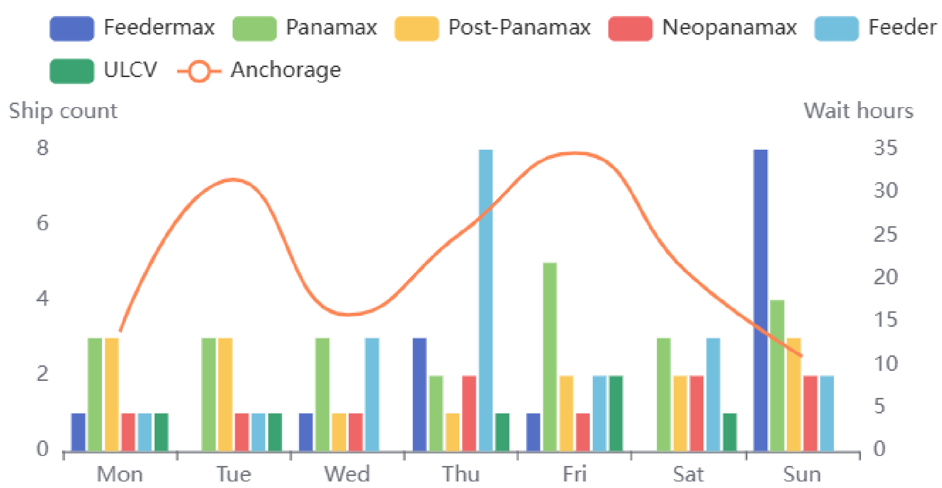
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| F.ma. | 1 | 2 | 0 | 1 | 1 | 0 | 3 |
| Pan. | 1 | 1 | 3 | 3 | 4 | 4 | 6 |
| PPx | 2 | 1 | 0 | 0 | 0 | 1 | 5 |
| NPx | 2 | 2 | 2 | 2 | 3 | 1 | 1 |
| Fd | 8 | 10 | 12 | 9 | 9 | 8 | 12 |
| Ulcv | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| WT.h. | 38.4 | 47.7 | 86.9 | 39.7 | 56.9 | 78.4 | 33 |




最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

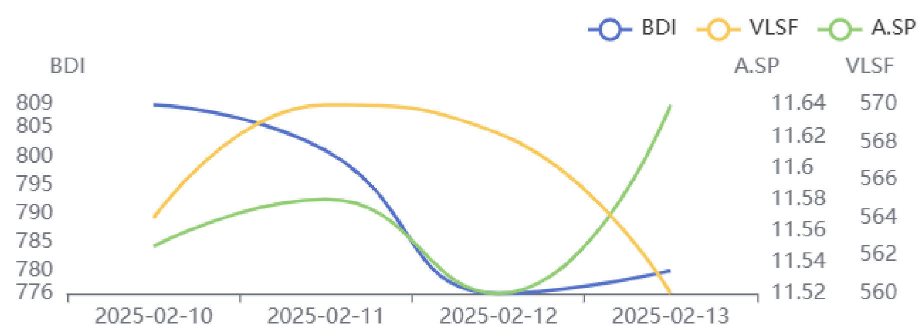
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| F.ma. | 1 | 0 | 1 | 3 | 1 | 0 | 8 |
| Pan. | 3 | 3 | 3 | 2 | 5 | 3 | 4 |
| PPx | 3 | 3 | 1 | 1 | 2 | 2 | 3 |
| NPx | 1 | 1 | 1 | 2 | 1 | 2 | 2 |
| Fd | 1 | 1 | 3 | 8 | 2 | 3 | 2 |
| Ulcv | 1 | 1 | 0 | 1 | 2 | 1 | 0 |
| WT.h. | 13.85 | 31.5 | 15.8 | 25.3 | 34.6 | 20.6 | 11 |




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

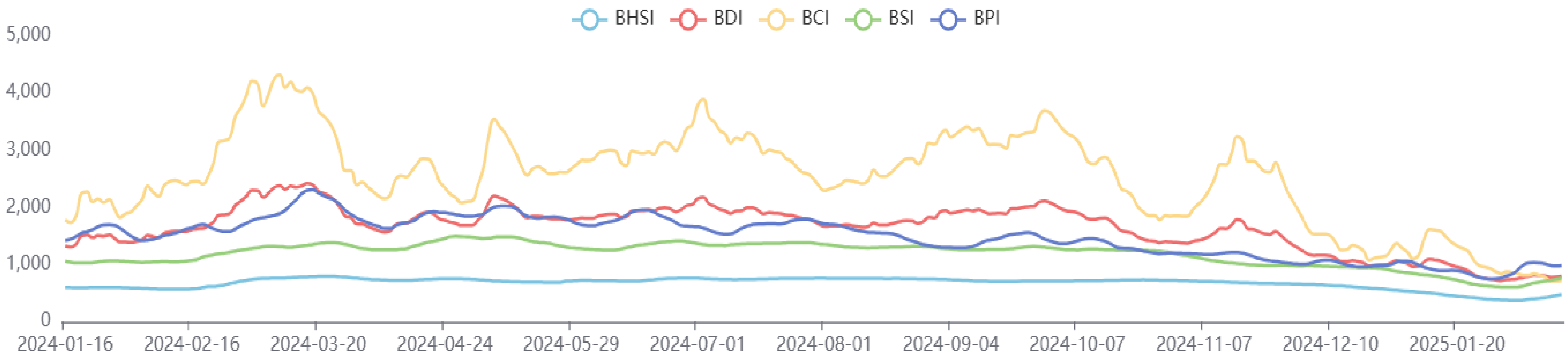
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| BDI | 1028 | 1011 | 983 | 974 | | | |
| VLSF | 564.00 | 570.00 | 568.50 | 560.00 | | | |
| A.SP | 11.55 | 11.58 | 11.52 | 11.64 | 11.63 | 11.67 | |



# 第三部分 航运市场 SHIPPING MARKET

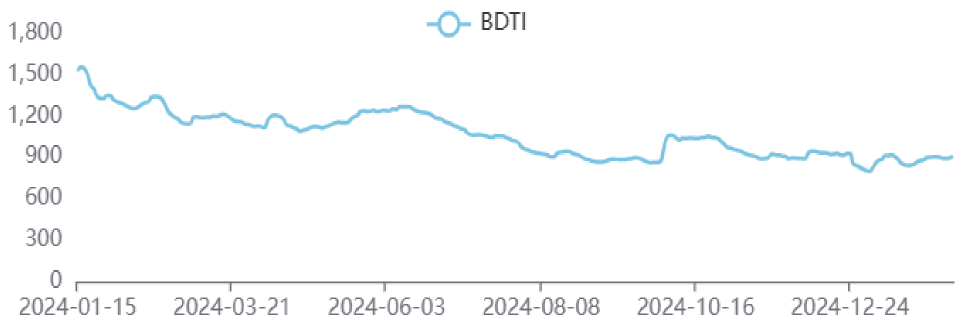
波罗的海干散货指数Baltic Dry Index

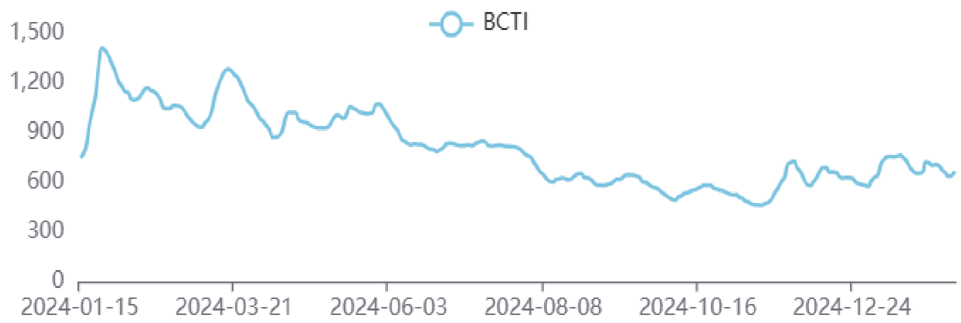
| Type | PI | WoW | W% | M% | y% |
|---|---|---|---|---|---|
| BDI | 792 | -23.0 | -2.82 | -19.76 | -49.94 |
| BCI | 716 | -124.0 | -14.76 | -48.6 | -70.61 |
| BPI | 980 | -55.0 | -5.31 | 9.25 | -38.05 |
| BSI | 765 | 88.0 | 13.0 | 2.41 | -27.28 |
| BHSI | 472 | 74.0 | 18.59 | 4.19 | -16.61 |

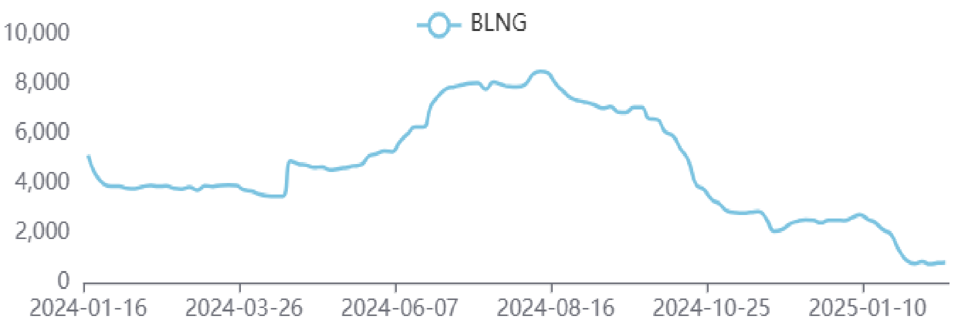


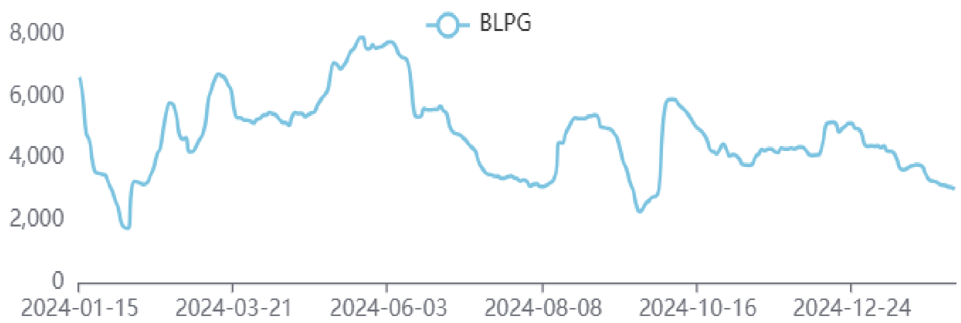

能源运价指数Energy Shipping Index

| Type | PI | WoW | W% | M% | y% |
|---|---|---|---|---|---|
| BDTI | 910 | 7.0 | 0.78 | -0.22 | -30.21 |
| BCTI | 666 | -34.0 | -4.86 | -11.9 | -42.29 |
| BLNG | 813 | 78.0 | 10.61 | -61.65 | -79.0 |
| BLPG | 3002 | -183.0 | -5.75 | -28.86 | -13.16 |

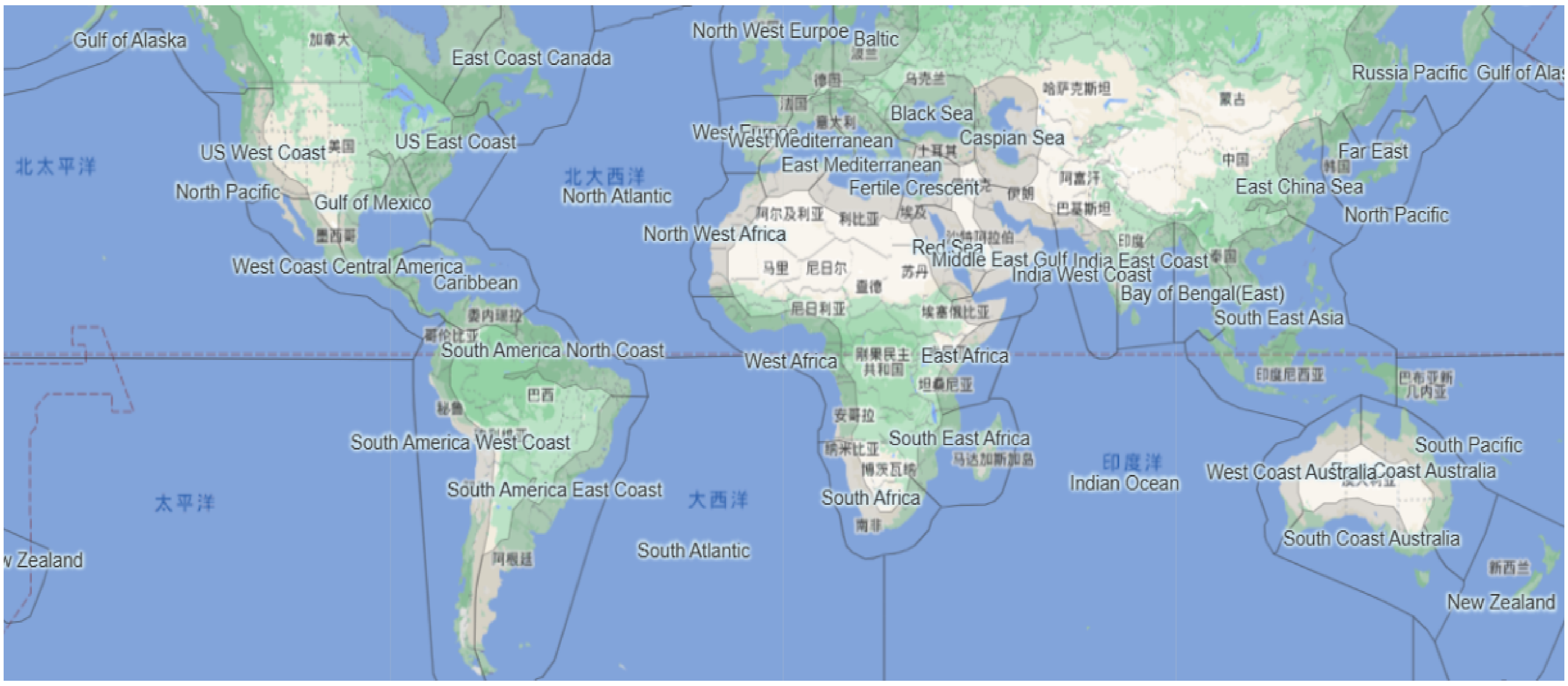


# 第四部分 运力分布 SUPPLY DISTRIBUTION

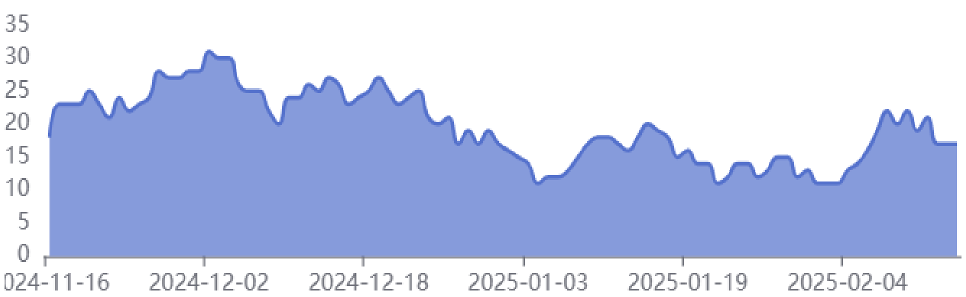



好望角型散货船 Capesize

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.

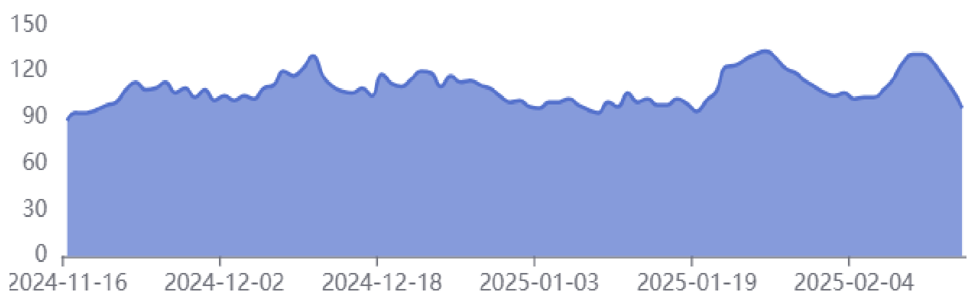
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| Cape | 20 | 22 | 19 | 21 | 17 | 17 | 17 |




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.

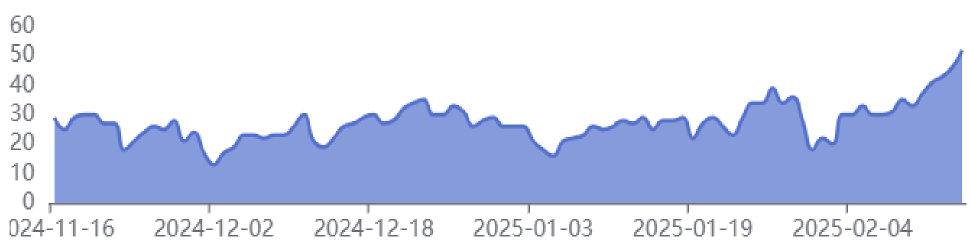
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| Cape | 126 | 131 | 131 | 126 | 117 | 108 | 96 |




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 | 35 | 33 | 37 | 41 | 43 | 46 | 52 |

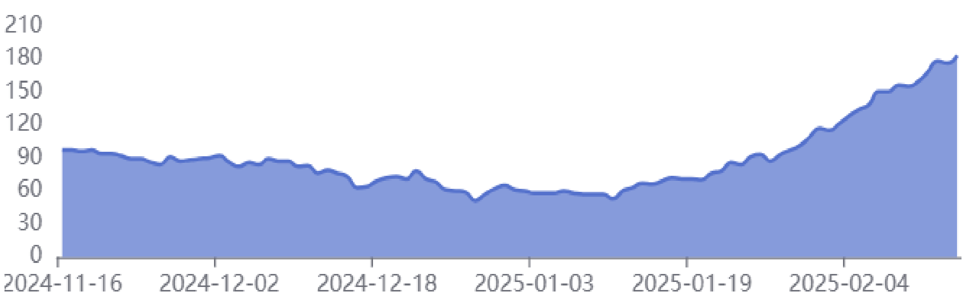



巴拿马型散货船 PANAMAX

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.

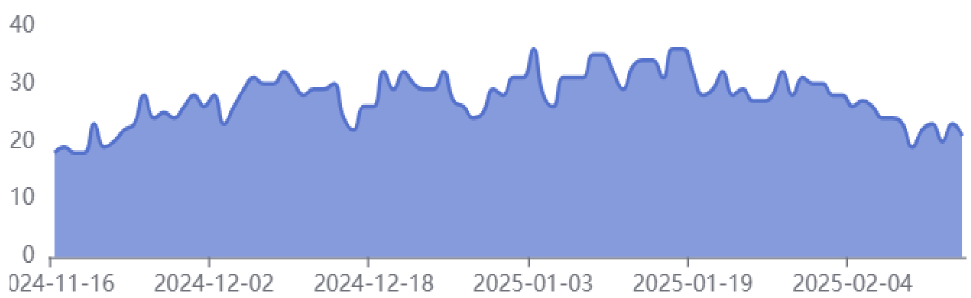
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| Pan. | 156 | 155 | 159 | 168 | 178 | 176 | 183 |




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.

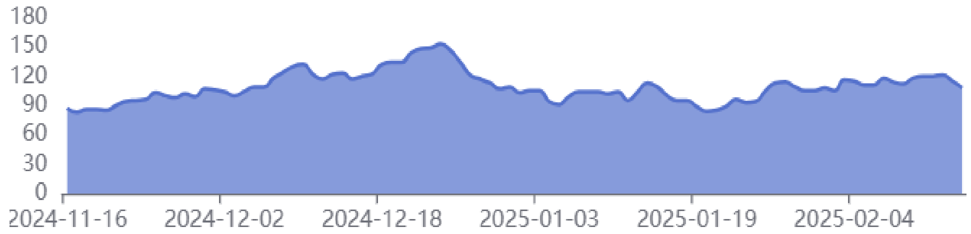
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| Pan. | 17 | 13 | 14 | 14 | 16 | 21 | 27 |



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. | 112 | 118 | 120 | 120 | 121 | 115 | 108 |

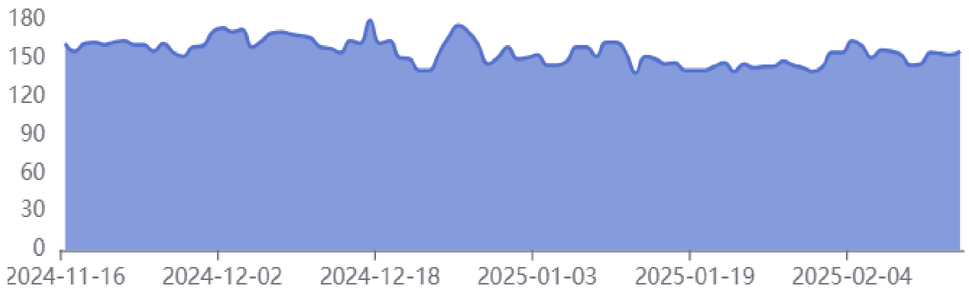



超大灵便型散货 SUPRAMAX

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.

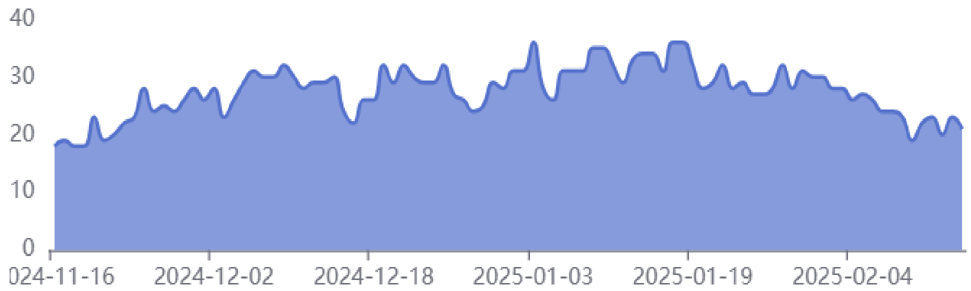
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| SMX | 152 | 144 | 145 | 154 | 153 | 152 | 155 |




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.

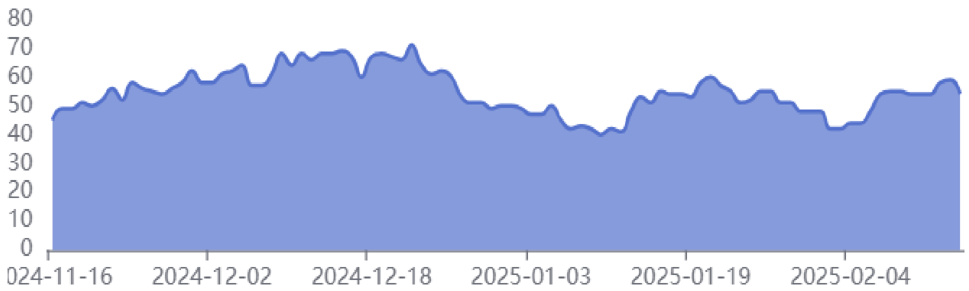
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| SMX | 23 | 19 | 22 | 23 | 20 | 23 | 21 |




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.

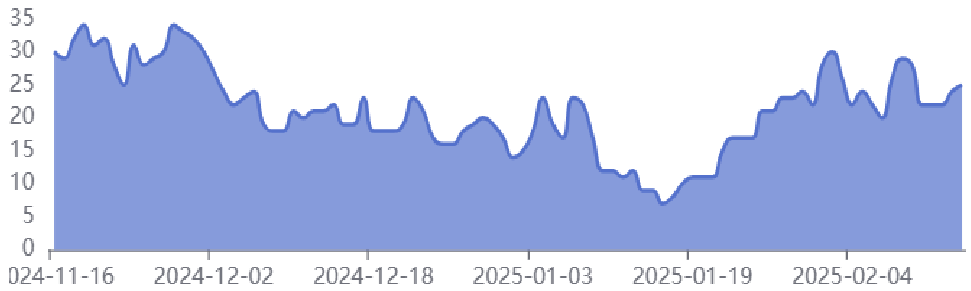
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| SMX | 29 | 28 | 22 | 22 | 22 | 24 | 25 |




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.

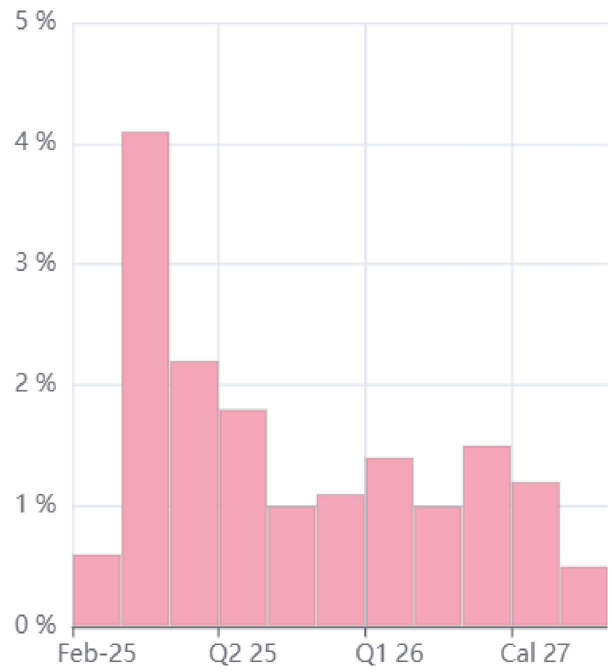
| Type | M | T | W | Th | F | Sat | Sun |
|---|---|---|---|---|---|---|---|
| SMX | 55 | 54 | 54 | 54 | 58 | 59 | 54 |

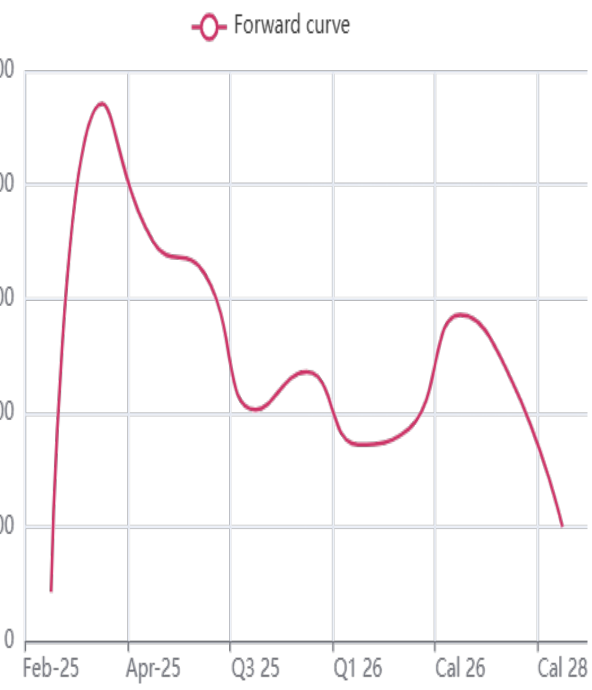


# 第五部分 远期运价协议 FFA

好望角型散货船Capesize

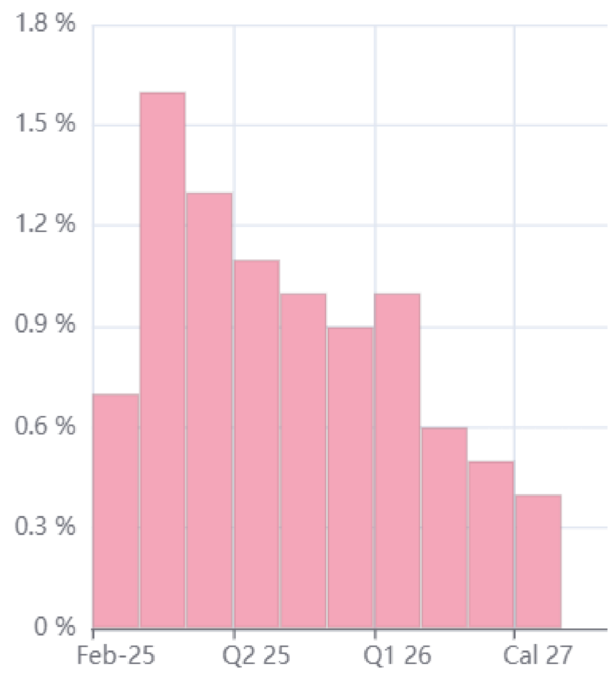
| 5TC | $/day | WoW | |
|---|---|---|---|
| Feb-25 | 6,907.00 | 43.0 | 0.6 % |
| Mar-25 | 12,014.00 | 471.0 | 4.1 % |
| Apr-25 | 16,579.00 | 350.0 | 2.2 % |
| Q2 25 | 18,075.00 | 322.33 | 1.8 % |
| Q3 25 | 20,931.67 | 202.67 | 1.0 % |
| Q4 25 | 21,825.00 | 236.0 | 1.1 % |
| Q1 26 | 12,586.00 | 172.0 | 1.4 % |
| Q2 26 | 18,057.00 | 186.0 | 1.0 % |
| Cal 26 | 18,935.75 | 286.0 | 1.5 % |
| Cal 27 | 18,918.00 | 229.0 | 1.2 % |
| Cal 28 | 18,636.00 | 100.0 | 0.5 % |

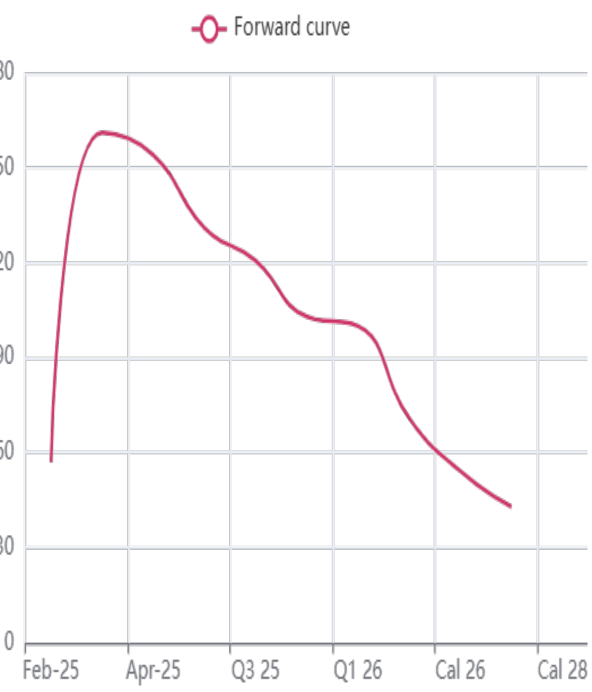



巴拿马型散货船Panamax

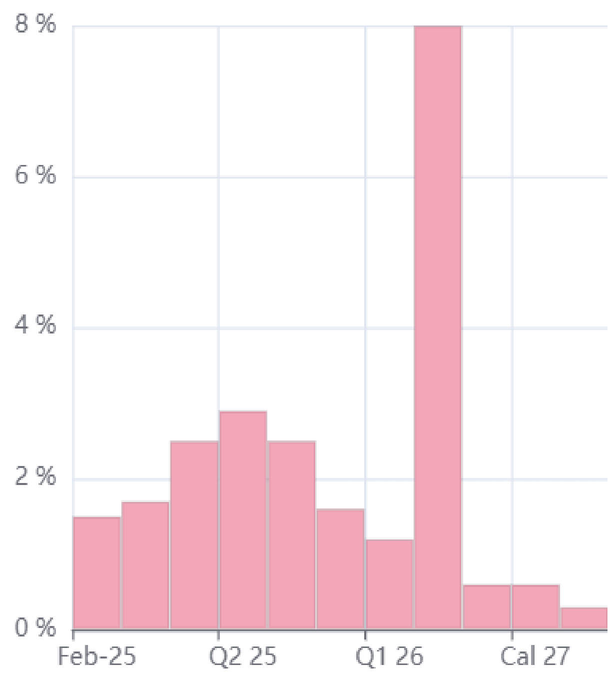
| 4TC | $/day | WoW | |
|---|---|---|---|
| Feb-25 | 7,746.00 | 57.0 | 0.7 % |
| Mar-25 | 10,500.00 | 161.0 | 1.6 % |
| Apr-25 | 11,900.00 | 154.0 | 1.3 % |
| Q2 25 | 12,038.00 | 131.0 | 1.1 % |
| Q3 25 | 11,988.67 | 120.67 | 1.0 % |
| Q4 25 | 11,421.00 | 103.0 | 0.9 % |
| Q1 26 | 9,693.00 | 100.0 | 1.0 % |
| Q2 26 | 11,107.00 | 71.0 | 0.6 % |
| Cal 26 | 10,961.00 | 54.25 | 0.5 % |
| Cal 27 | 11,079.00 | 43.0 | 0.4 % |
| Cal 28 | - | - | - |

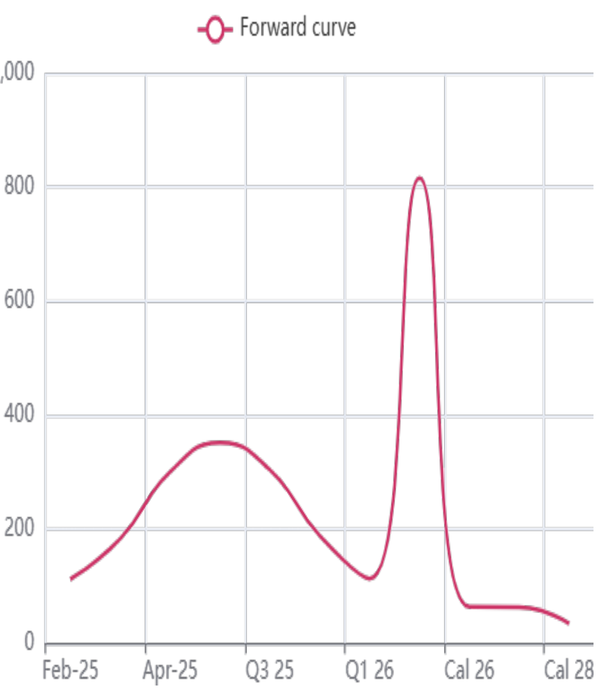



超大灵便型散货船Supramax

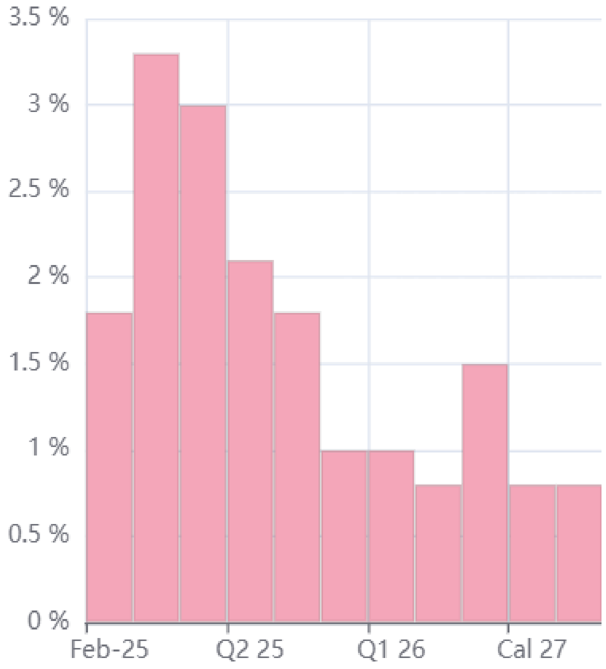
| 10TC | $/day | WoW | |
|---|---|---|---|
| Feb-25 | 7,650.00 | 112.0 | 1.5 % |
| Mar-25 | 10,850.00 | 183.0 | 1.7 % |
| Apr-25 | 12,167.00 | 300.0 | 2.5 % |
| Q2 25 | 12,394.67 | 351.33 | 2.9 % |
| Q3 25 | 12,353.67 | 303.67 | 2.5 % |
| Q4 25 | 11,721.00 | 188.0 | 1.6 % |
| Q1 26 | 9,863.00 | 113.0 | 1.2 % |
| Q2 26 | 10,958.00 | 816.0 | 8.0 % |
| 11,292.25 | Cal 26 | 63.25 | 0.6 % |
| Cal 27 | 11,338.00 | 63.0 | 0.6 % |
| Cal 28 | 11,342.00 | 34.0 | 0.3 % |

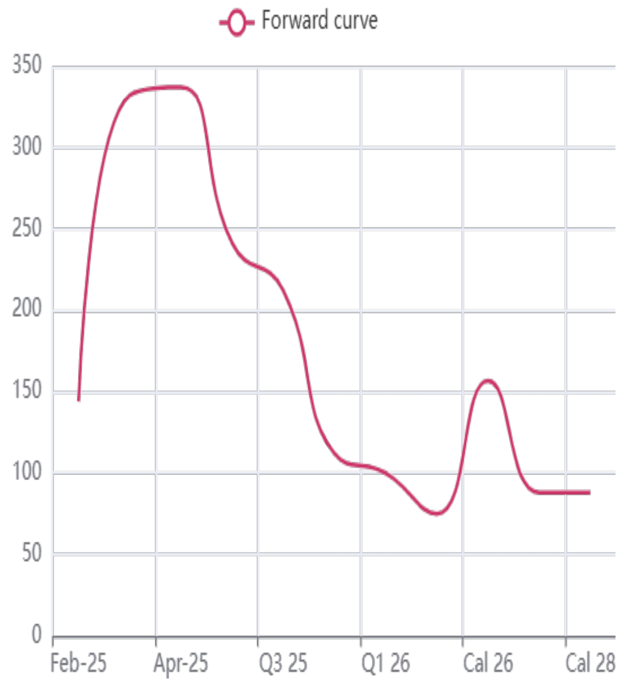


灵便型散货船Handysize

| 7TC | $/day | WoW | |
|---|---|---|---|
| Feb-25 | 8,313.00 | 144.0 | 1.8 % |
| Mar-25 | 10,538.00 | 332.0 | 3.3 % |
| Apr-25 | 11,750.00 | 337.0 | 3.0 % |
| Q2 25 | 11,875.00 | 241.33 | 2.1 % |
| Q3 25 | 11,825.00 | 212.0 | 1.8 % |
| Q4 25 | 11,225.00 | 112.0 | 1.0 % |
| Q1 26 | 9,638.00 | 100.0 | 100.0 |
| Q2 26 | 9,925.00 | 75.0 | 0.8 % |
| Cal 26 | 10,812.75 | 156.75 | 1.5 % |
| Cal 27 | 10,813.00 | 88.0 | 0.8 % |
| Cal 28 | 10,888.00 | 88.0 | 0.8 % |

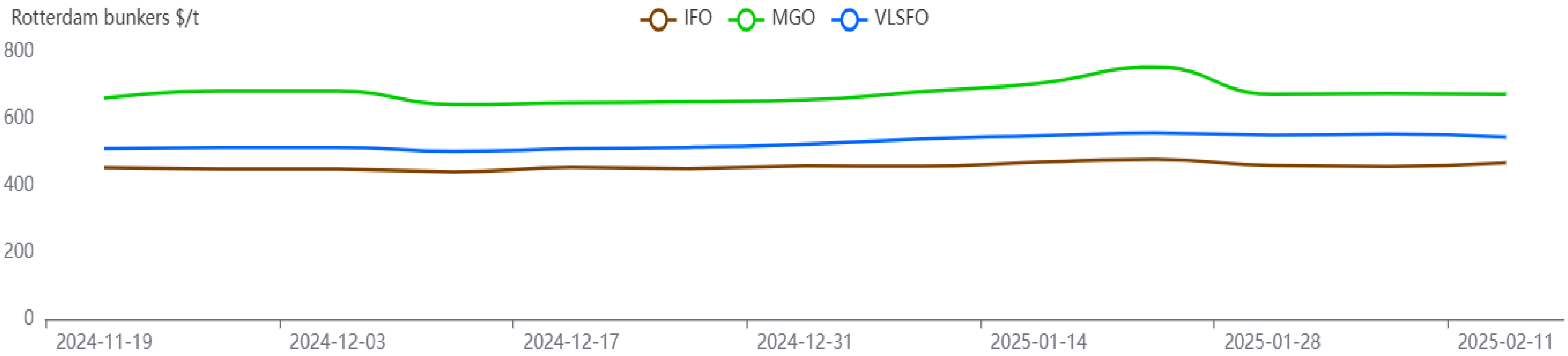


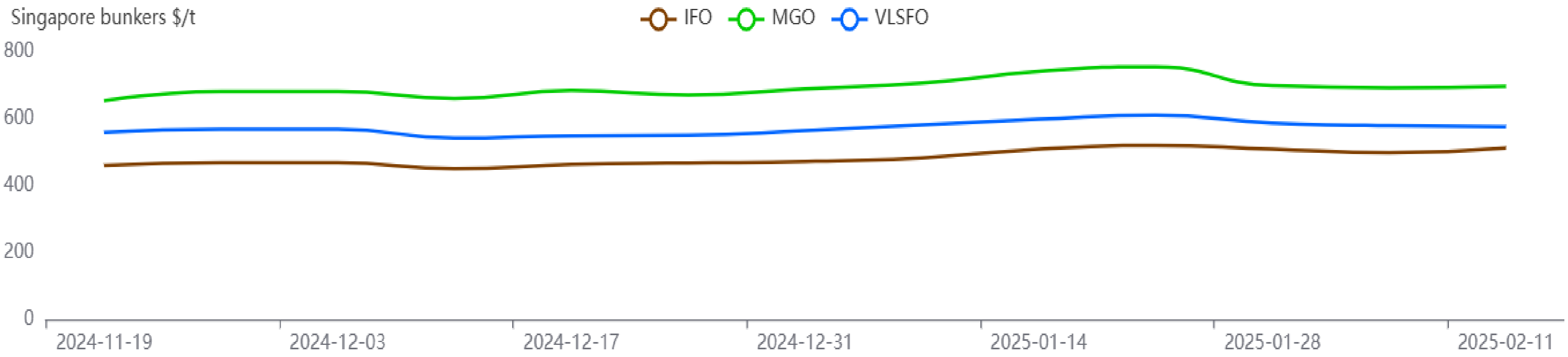



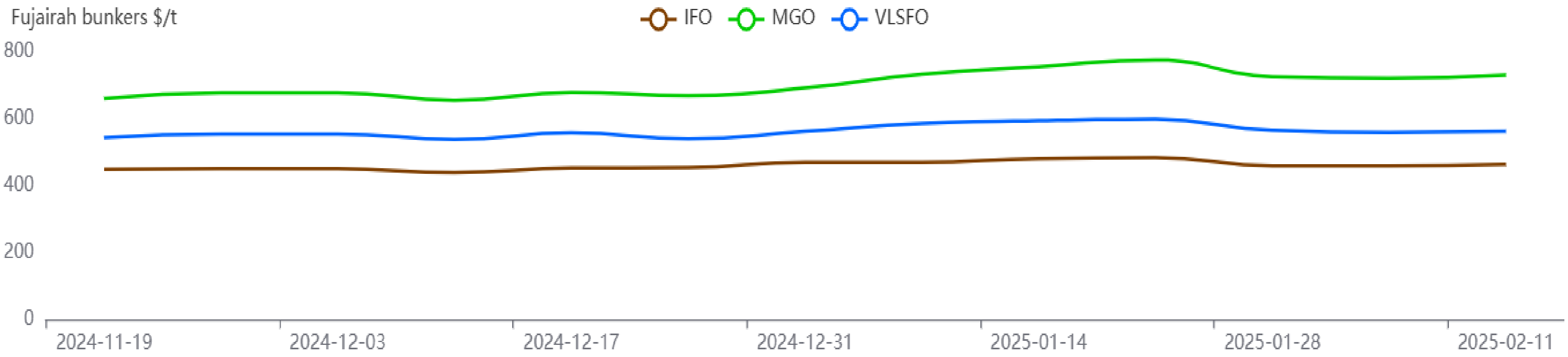
# 第六部分 燃油价格 BUNKER PRICE

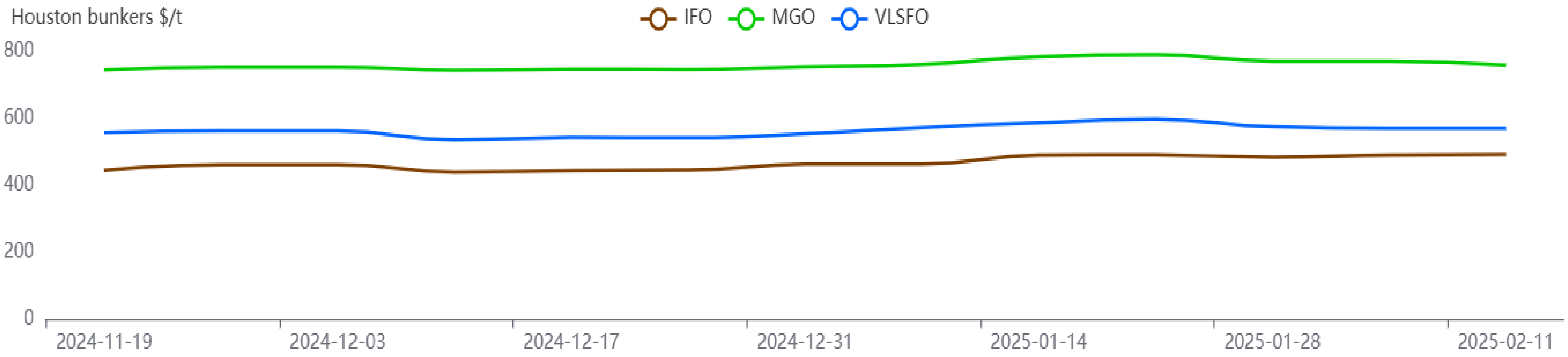
| MP | LO | HO | MO | SP | WoW | W% | M% |
|---|---|---|---|---|---|---|---|
| zhoushan | 568.5 | 522.0 | 723.5 | 46.5 | -19.5 | -29.55 | -41.14 |
| Singapore | 577.5 | 513.0 | 698.0 | 64.5 | -16.0 | -19.88 | -27.53 |
| Rotterdam | 546.0 | 469.0 | 675.5 | 77.0 | -21.0 | -21.43 | -1.91 |
| Fujairah | 563.0 | 464.5 | 732.0 | 98.5 | -1.5 | -1.5 | -13.22 |
| Houston | 570.5 | 493.0 | 761.0 | 77.5 | -2.0 | -2.52 | -20.51 |

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



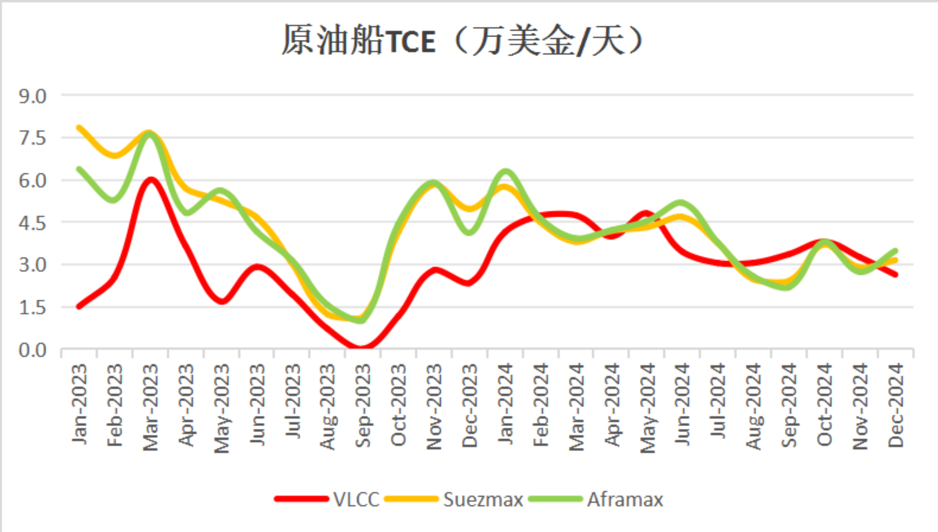



# 第七部分 最新商品价格 LATEST COMMODITIES PRICE

| Grains and Oilseeds | Index | | +/- | Weekly | Monthly | YTD |
|---|---|---|---|---|---|---|
| Wheat | 205.0 | | -17.0 | -7.66 | 3.02 | -5.09 |
| Maize | 241.0 | | 0.0 | 0.0 | 2.55 | 17.56 |
| Soybeans | 204.0 | | -2.0 | -0.97 | -2.39 | -6.85 |
| Rice | 189.0 | | -3.0 | -1.56 | -6.9 | -28.41 |
| Barley | 233.0 | | 2.0 | 0.87 | 4.95 | 7.87 |
| Energy | | Index | +/- | Weekly | Monthly | YTD |
| Crude Oil | USD/Bbl | 72.91 | 0.5 | 0.69 | -6.07 | 1.42 |
| Brent | USD/Bbl | 76.6 | 0.85 | 1.12 | -4.18 | -0.51 |
| Natural Gas | USD/MMBtu | 3.49 | 0.29 | 9.06 | -10.28 | 66.99 |
| Gasoline | USD/Gal | 2.12 | 0.03 | 1.44 | 0.0 | -0.93 |
| Heating Oil | USD/Gal | 2.47 | 0.05 | 2.07 | -2.76 | -7.49 |
| Ethanol | USD/Gal | 1.77 | -0.02 | -1.12 | 2.91 | 12.03 |
| Naphtha | USD/T | 656.16 | 7.47 | 1.15 | 0.99 | 5.79 |
| Propane | USD/Gal | 0.93 | 0.02 | 2.2 | 4.49 | 1.09 |
| Uranium | USD/Lbs | 68.4 | -2.7 | -3.8 | -7.25 | -31.6 |
| Methanol | CNY/T | 2611.0 | 1.0 | 0.04 | -2.03 | 3.73 |
| TTF Gas | EUR/MWh | 57.68 | 4.65 | 8.77 | 21.95 | 97.87 |
| UK Gas | GBp/thm | 140.24 | 11.27 | 8.74 | 17.97 | 97.52 |
| Industrial | | Index | +/- | Weekly | Monthly | YTD |
| Copper | USD/Lbs | 4.64 | 0.28 | 6.42 | 7.91 | 21.78 |
| Coal | USD/T | 105.65 | -6.85 | -6.09 | -8.45 | -8.92 |
| Steel | CNY/T | 3204.0 | -54.0 | -1.66 | -0.37 | -17.47 |
| Iron Ore | USD/T | 106.97 | 1.57 | 1.49 | 8.36 | -18.03 |
| Aluminum | USD/T | 2654.75 | 36.7 | 1.4 | 3.46 | 19.18 |
| Lithium | CNY/T | 76650.0 | -1000.0 | -1.29 | 0.39 | N/A |
| Metals | | Index | +/- | Weekly | Monthly | YTD |
| Gold | USD/t.oz | 2913.12 | 44.92 | 1.57 | 8.98 | 43.97 |
| Silver | USD/t.oz | 31.82 | -0.61 | -1.88 | 6.71 | 42.05 |
| Platium | null | 1018.7 | 13.4 | 1.33 | 9.2 | N/A |
| Currencies | Index | | +/- | Weekly | Monthly | YTD |
| EUR/USD | 1.03 | | -0.01 | -0.96 | 0.0 | -4.63 |
| USD/CNY | 7.31 | | 0.03 | 0.41 | -0.54 | 1.25 |

# 第八部分 本周话题 WEEKLY TOPIC




## HIFLEET 2024液散货海运数据统计

2024年，原油船船队共计2318艘，运力合计4.61亿载重吨，较2023年同期增长2%；全年共交付16艘新船（1条VLCC，9条苏伊士型，6条阿芙拉型），累计运力241万载重吨。全球LNG船共有808艘，运力合计约近1.22亿立方，同比增长超8%,其中2024年新船交付69艘。全球VLGC（仓容65000立方及以上）共计428艘，运力合计3611万立方，2351万载重吨。

2024年原油海运费指数BDTI震荡下行，录得全年均值为1092点，与2023年同比回落5%；分船型来看，VLCC全年TCE均值37565美金，同比2023年提高65%，苏伊士型和阿芙拉型TCE均值分别为38067美金和39499美金，同比回落分别为22%和12%.

2024年，BLNG均值录得5103，同比2023年回落近50%。

BLPG指数2024年整体回落49%，从一月份即回落至低位，并窄幅徘徊在5000上下；BLPG所取代表航线中东-日本，全年运费均值为62美金/吨，较2023年均值（109美金/吨）回落43%.

2024年全球原油海运贸易量（不同国家之间）共计22.24亿吨，与2023年基本持平；沙特受到减产及其本国燃料需求增加的影响，其原油出口量有所下滑，较2023年减少4%；美国和俄罗斯的原油海运出口量在2024下半年均出现疲软，但全年总量变化不大，美国小幅上涨1%，俄罗斯仅仅减少了85万吨；巴西原油海运出口得到1%的增长，且其原油出口额可能将超过大豆和铁矿石。

2024年，中国原油海运进口量5.38亿吨，月均进口量较2023年减少187万吨，同比下降4%，充分说明我国正在加快推进能源转型。

自俄乌冲突爆发以来，全球天然气贸易格局开始重塑，LNG 贸易量开始扩增，但2024年与2023年同期基本持平，全球LNG发运量保持在3.96亿吨；其中美国LNG发运量8856万吨，全球第一，与2023年相比涨幅超7%，增速较快；澳大利亚和卡塔尔分别小幅增长310万吨和100万吨。

根据HIFLEET数据统计，2024年我国大陆地区进口LNG共7819万吨，较2023年的7153万吨上涨超9%；惠州、潮州等LNG接收站在2024年相继投产，我国LNG接收能力爆发式扩增。

根据HIFLEET统计VLGC航次数据分析，2024年，全球 LPG发运 8761万吨，较去年同期回落 9%；但美国却逆势增加LPG出口量，较2023年增长接近9%，这主要得益于巴拿马运河通航水平得到恢复。

我国海关数据（液化丙烷+其他液化丁烷）显示，2024年进口液化石油气3457万吨（预估12月进口量为242万吨）；HIFLEET数据统计，2024年我国VLGC到港共计901艘次（较2023年减少97艘次），共计卸货量约3313万吨，占我国LPG总进口量的95%以上。

In 2024, the crude oil fleet totaled 2,318 vessels with a combined capacity of 461 million deadweight, an increase of 2% over the same period in 2023; A total of 16 new vessels (1 VLCC, 9 Suezmax, 6 Aframax) were delivered during the year, with a cumulative capacity of 2.41 million DWT. There are 808 LNG carriers in the world, with a total capacity of nearly 122 million cubic meters, an increase of more than 8%, of which 69 new ships will be delivered in 2024. There are 428 VLGC (65,000 cubic meters and above) in the world, with a total capacity of 36.11 million cubic meters and 23.51 million deadweight tons.

The 2024 crude oil sea freight index BDTI fluctuated downward, recording an annual average of 1092 points, down 5% from 2023; By ship type, the VLCC annual TCE average of 37,565 US dollars, an increase of 65% compared with 2023, Suez and Afra TCE average of 38,067 US dollars and 39,499 US dollars, respectively, down 22% and 12%. In 2024, the BLNG average recorded 5,103, down nearly 50% from 2023.

The BLPG index fell 49% overall in 2024, falling to a low from January, and hovering narrowly around 5000; The average annual freight rate of BLPG's representative route, Middle East - Japan, is 62 USD/ton, which is 43% lower than the average of 2023 (109 USD/ton).

In 2024, the global seaborne trade of crude oil (between different countries) will total 2.224 billion tons, which is basically the same as that in 2023. Saudi Arabia, affected by production cuts and increased demand for its own fuel, has seen its crude oil exports decline, down 4% from 2023. Crude oil seaborne exports from both the United States and Russia weakened in the second half of 2024, but the total volume for the year was little changed, with the United States rising slightly by 1% and Russia only decreasing by 850,000 tons. Brazil's seaborne crude oil exports rose 1 percent, and its crude oil exports are likely to surpass those of soybeans and iron ore.

In 2024, China's seaborne crude oil imports of 538 million tons, the average monthly import volume decreased by 1.87 million tons compared with 2023, down 4% year-on-year, fully demonstrating that China is accelerating its energy transformation.

Since the outbreak of the conflict between Russia and Ukraine, the global natural gas trade pattern has begun to reshape, and the LNG trade volume has begun to expand, but the same period in 2024 and 2023 is basically flat, and the global LNG shipment volume remains at 396 million tons; Among them, the LNG shipment volume of the United States is 88.56 million tons, the first in the world, and the growth rate is more than 7% compared with 2023. Australia and Qatar saw small increases of 3.1 million tons and 1 million tons, respectively.

According to HIFLEET data, a total of 78.19 million tons of LNG will be imported from China's mainland in 2024, up more than 9% from 71.53 million tons in 2023. LNG receiving stations such as Huizhou and Chaozhou will be put into operation one after another in 2024, and China's LNG receiving capacity will explode.

According to HIFLEET statistics VLGC voyage data analysis, in 2024, the global LPG shipment 87.61 million tons, down 9% from the same period last year; However, the United States bucked the trend and increased LPG exports by nearly 9% from 2023, mainly due to the resumption of traffic levels in the Panama Canal.

China's customs data (liquefied propane + other liquefied butane) shows that the import of liquefied petroleum gas in 2024 is 34.57 million tons (estimated imports in December are 2.42 million tons); HIFLEET data statistics, in 2024, China's VLGC to the port a total of 901 times (less than 2023, 97 times), a total of about 33.13 million tons of unloading, accounting for more than 95% of China's total LPG imports.