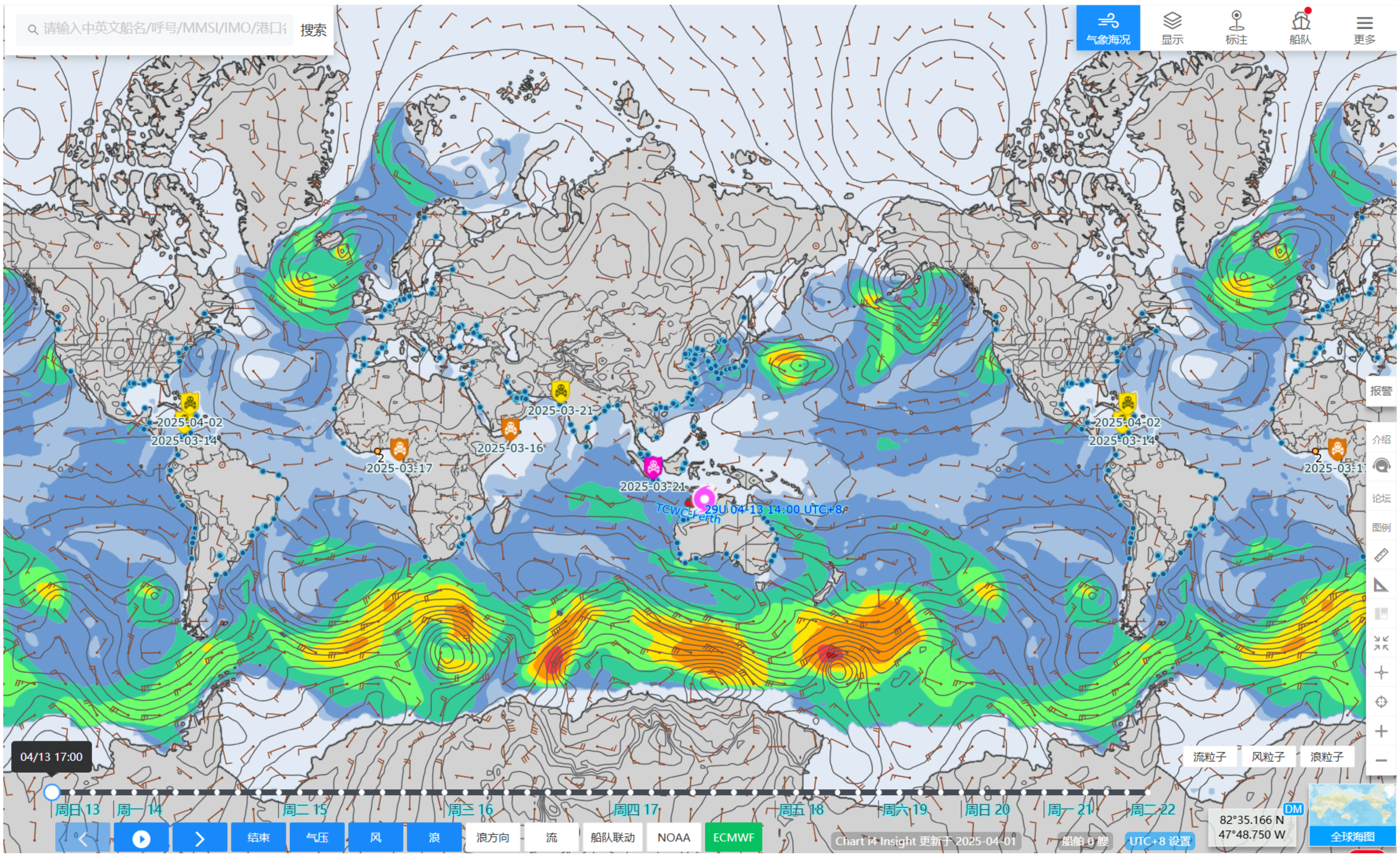
2025年
第15周市场周报

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298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 298 navigational warnings in effect around the ocean on hiFleet with the Far East 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6-4级，中浪到轻浪；黄海风力6-4级，大浪到轻浪；东海风力6-4级，大浪到中浪；台湾海峡4-5级风，中浪；南海大部海域风力3-4级，轻浪。太平洋北部和北大西洋的低气压开始减弱。欢迎咨询HiFleet咨询气导服务或气象报告抗辩，请联系hiFleet。The coming week the wind in Bohai Sea to become weak from strong to moderate with ease sea to moderate as well. Wind in Yellow Sea become weak with slight sea. And China East Sea will become moderate with moderate sea. The wind in the Taiwan Strait will be moderate with moderate sea as well. In most of the South China Sea the wind to be moderate with slight sea. The low pressure activities become small and gentle both in North of Pacific and Atlantic. Welcome to consult the HiFleet weather routing service.

海盗事件 Piracy

4月2号，海地太子港以西约6海里处，武装人员未经授权登上了一艘漂流货船。他们用枪袭击了一名船员，其他船员在他们的船舱和机舱寻求庇护，袭击者在逃跑前绑架了两名船员。这起事件已报告给海地海岸警卫队。02.04.2025: 0300 UTC: Posn: 18:34.68N – 072:27.16W, Around 6nm West of Port Au Prince, Haiti. Armed individuals without authorization boarded a drifting bulk carrier. They struck a crew member with a gun, causing others to seek refuge in their cabins and the engine room. The assailants then abducted two crew members before fleeing. The incident was reported to the Haitian coast guard.

海上事件 Marine Incidents

4月9日报道，欧洲当地时间13点左右，一艘德国集装箱船在北海发生爆炸并起火，这是一艘1304标箱的VICTORIA L号（原名Om Bonitatis 2009年建造）。On April 9, it was reported that at around 13:00 local time in Europe, a German container ship exploded and caught fire in the North Sea, which is a 1304 TEU VICTORIA L (formerly Om Bonitatis built in 2009).

其它 Others

没有 Nil

备注 Remark

本报告数据截止时间为2025年4月13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 Apr 13th of 2025; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

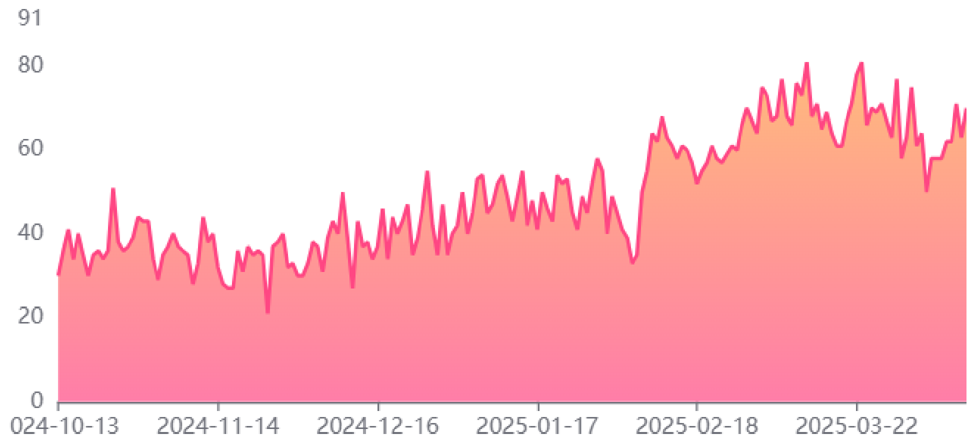
第二部分 航运数据 SHIPPING DATA

最近一周船舶运河/河口锚地等待数量

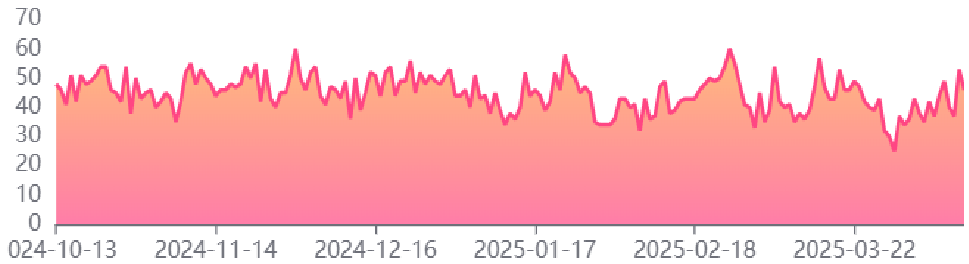
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	46	1196	58	-102
Miss.Riv.	2	90	-26	-2
CJK	205	4905	-18	-103
Pa.Atlan.	66	1636	26	110
Colum.Riv.	7	197	-3	35
Suez.Med.	70	1908	-4	7
Pa.Pac.	56	1629	11	-168
ZJK	68	2493	72	-39

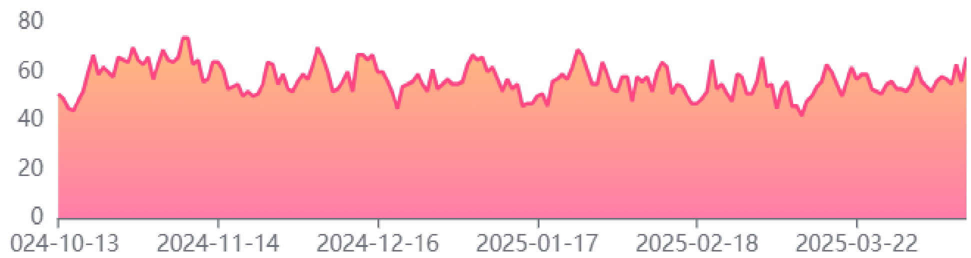
Suez(Mediterranean-Red Sea)



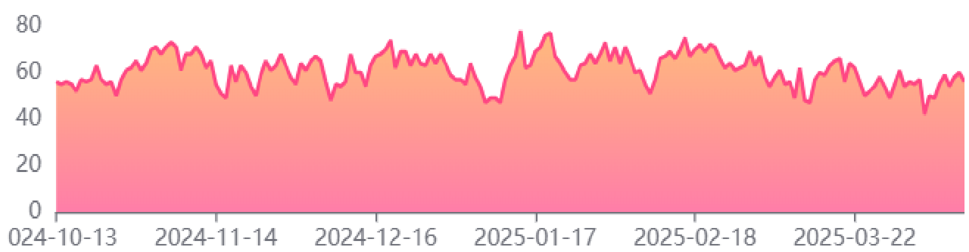
Suez(Red Sea-Mediterranean)



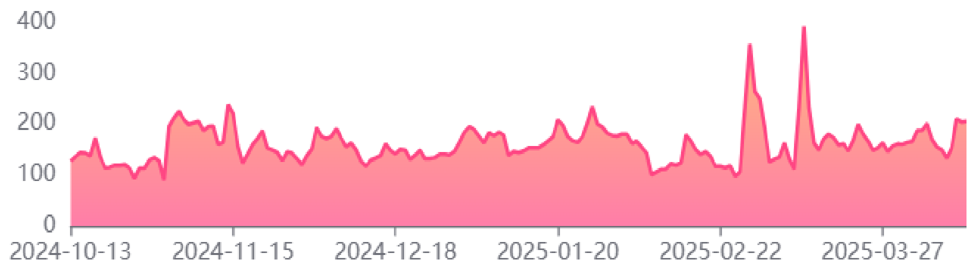
Panama(Atlantic-Pacific)



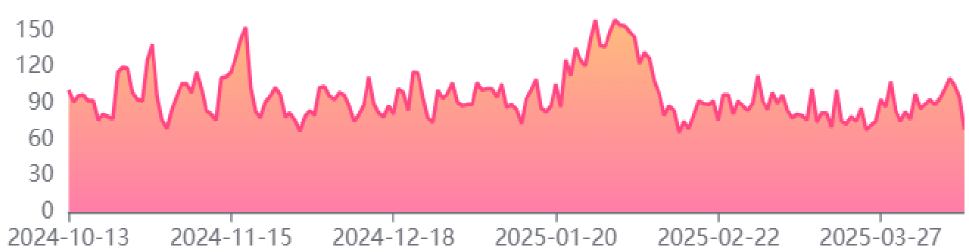
Panama(Pacific-Atlantic)



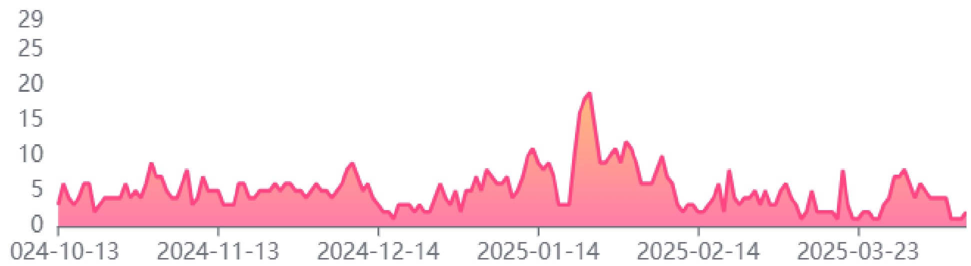
Changjiangkou(Estuary)



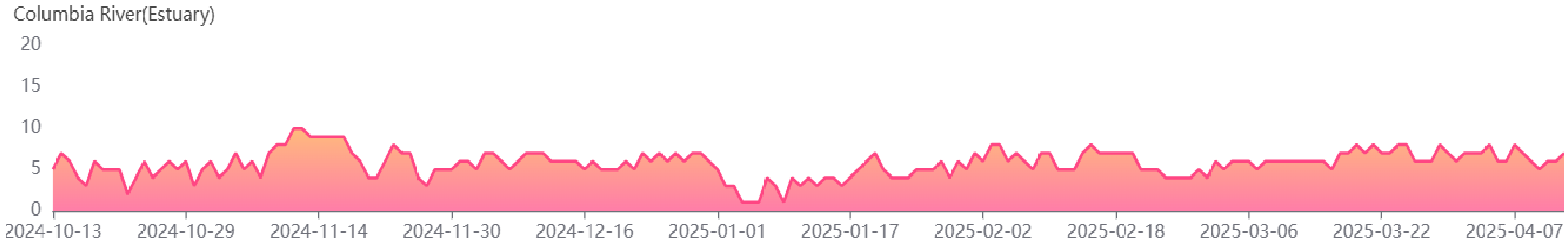
Zhujiangkou(Estuary)



Mississippi River(Estuary)



Columbia River(Estuary)

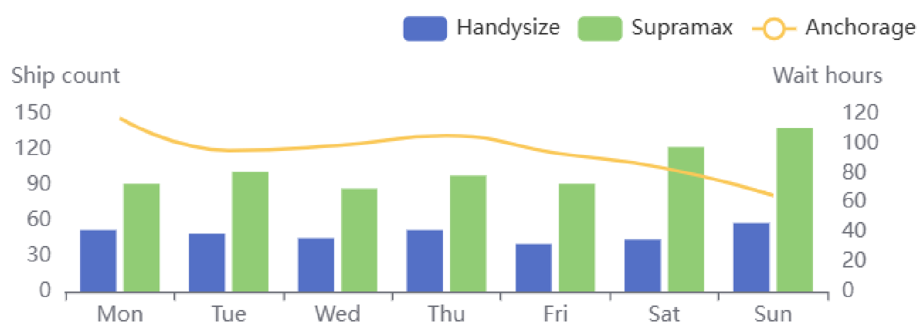


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

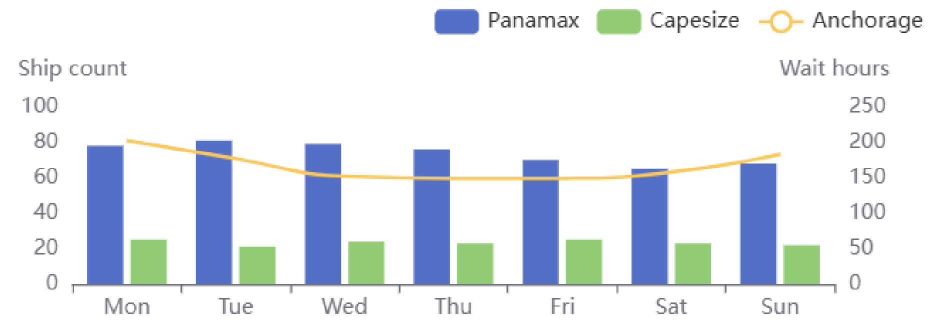
Type	M	T	W	Th	F	Sat	Sun
HDY	52	49	45	52	40	44	58
SMX	91	101	87	98	91	122	138
WT.h.	117.2	95.4	98.7	105.3	93.7	83.4	65



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

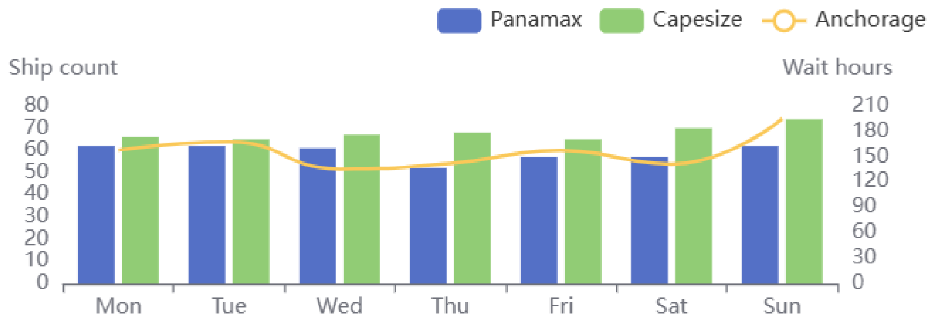
Type	M	T	W	Th	F	Sat	Sun
Pan.	78	81	79	76	70	65	68
Cap	25	21	24	23	25	23	22
WT.h.	202.6	176.8	152.1	149	149.2	157.8	183



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

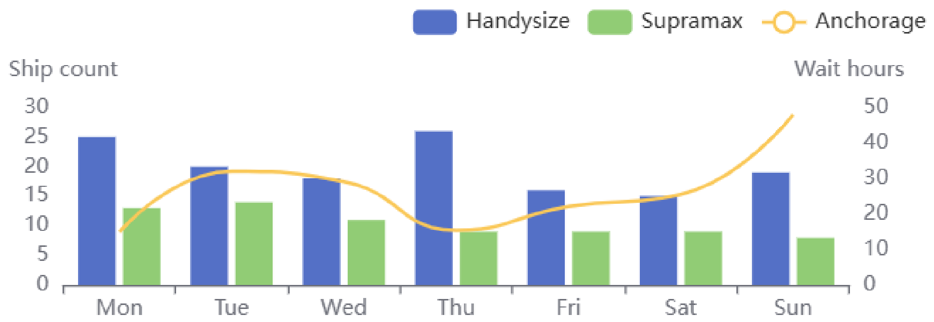
Type	M	T	W	Th	F	Sat	Sun
Pan.	62	62	61	52	57	57	62
Cap	66	65	67	68	65	70	74
WT.h.	157.7	167.7	135.4	142	157.3	141.3	195



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

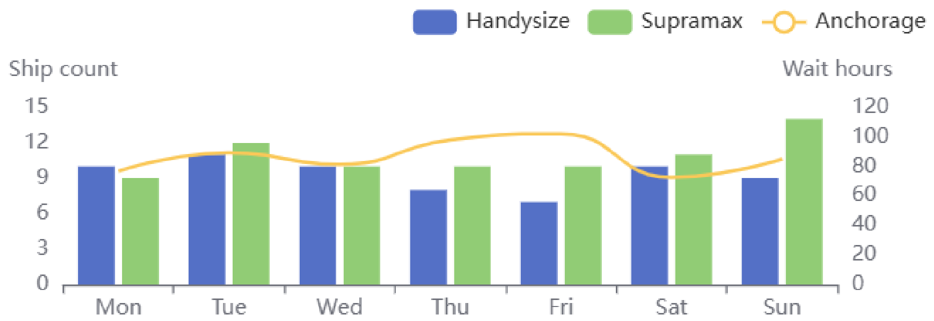
Type	M	T	W	Th	F	Sat	Sun
HDY	25	20	18	26	16	15	19
SMX	13	14	11	9	9	9	8
WT.h.	14.95	32	29.1	15.4	22.1	25.5	48



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

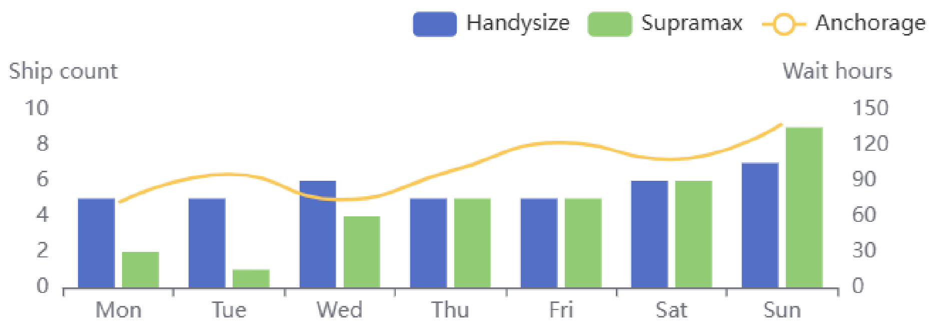
Type	M	T	W	Th	F	Sat	Sun
HDY	10	11	10	8	7	10	9
SMX	9	12	10	10	10	11	14
WT.h.	76.8	89.3	81.25	97.9	102.1	72.5	85



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

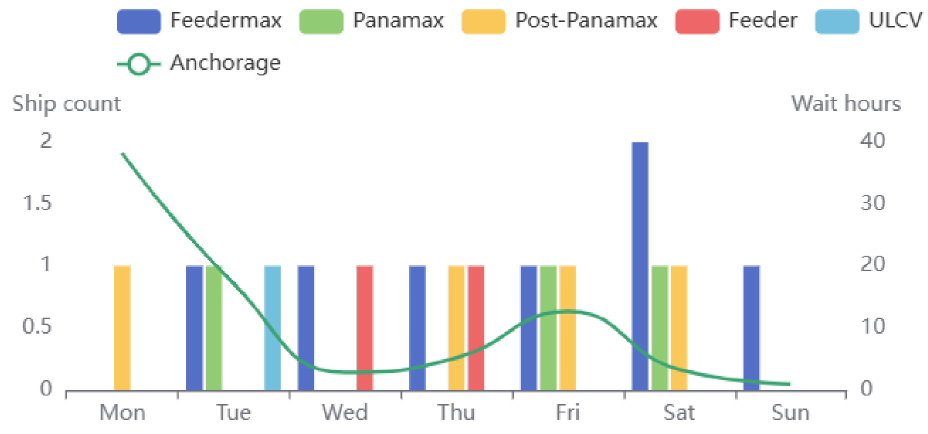
Type	M	T	W	Th	F	Sat	Sun
HDY	5	5	6	5	5	6	7
SMX	2	1	4	5	5	6	9
WT.h.	71.5	95.5	74	98	122	108.1	138



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

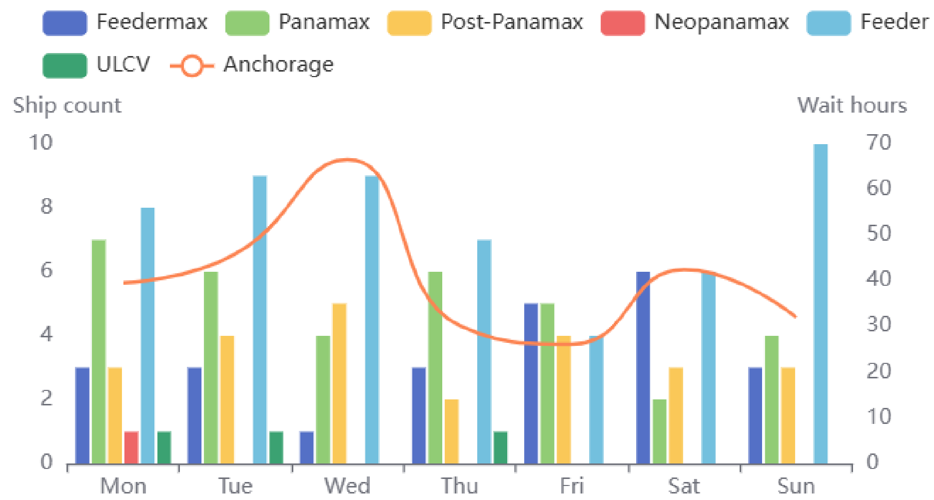
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	1	1	1	1	2	1
Pan.	0	1	0	0	1	1	0
PPx	1	0	0	1	1	1	0
NPx	0	0	0	0	0	0	0
Fd	0	0	1	1	0	0	0
WT.h.	38.2	17.2	2.85	5.2	12.7	3.3	1
Ulcv	0	1	0	0	0	0	0



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

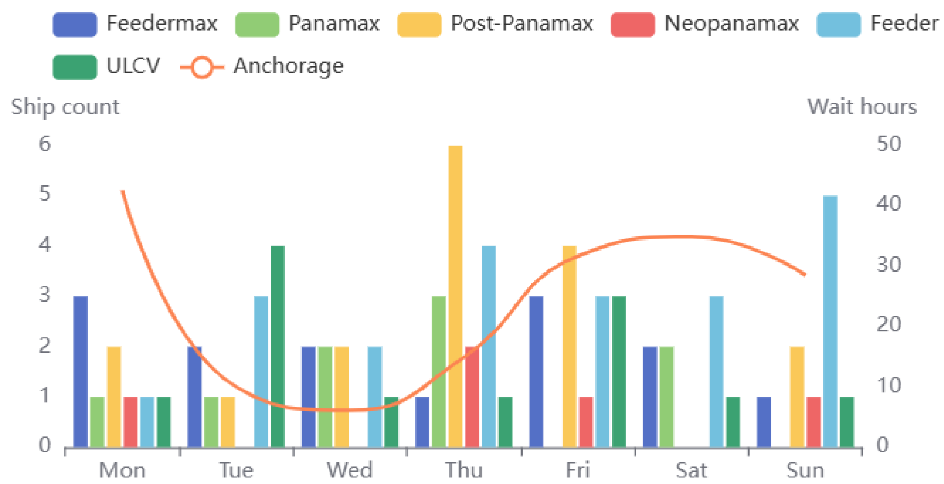
Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	3	1	3	5	6	3
Pan.	7	6	4	6	5	2	4
PPx	3	4	5	2	4	3	3
NPx	1	0	0	0	0	0	0
Fd	8	9	9	7	4	6	10
Ulcv	1	1	0	1	0	0	0
WT.h.	39.6	45.9	66.6	30.2	26.15	42.5	32



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

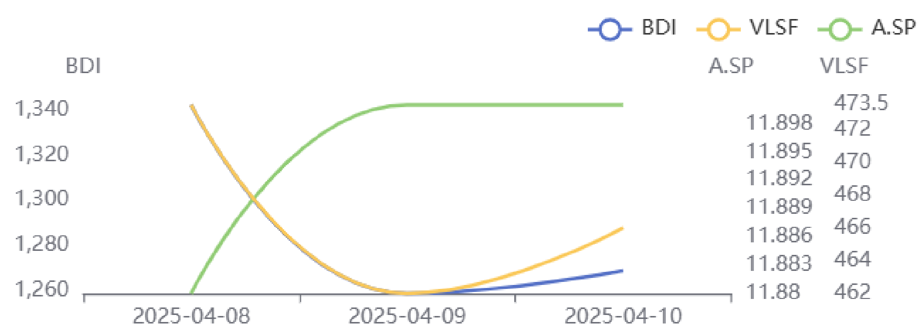
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	2	2	1	3	2	1
Pan.	1	1	2	3	0	2	0
PPx	2	1	2	6	4	0	2
NPx	1	0	0	2	1	0	1
Fd	1	3	2	4	3	3	5
Ulcv	1	4	1	1	3	1	1
WT.h.	42.6	10	6.1	14.9	31.65	34.9	28.5



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

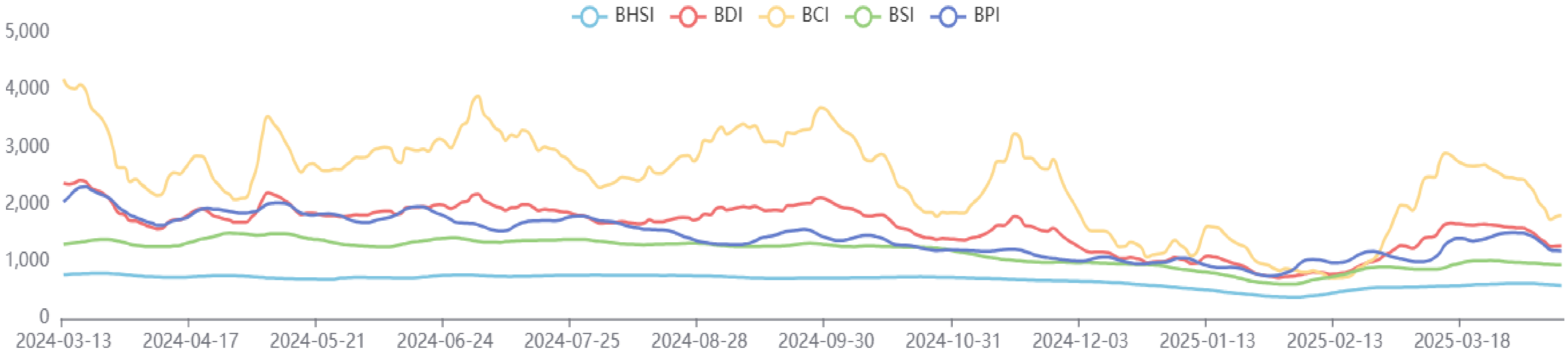
Type	M	T	W	Th	F	Sat	Sun
BDI	1356	1278	1203	1189			
VLSF	473.50	462.00	466.00				
A.SP	11.87	11.88	11.9	11.9	11.89	11.83	



第三部分 航运市场 SHIPPING MARKET

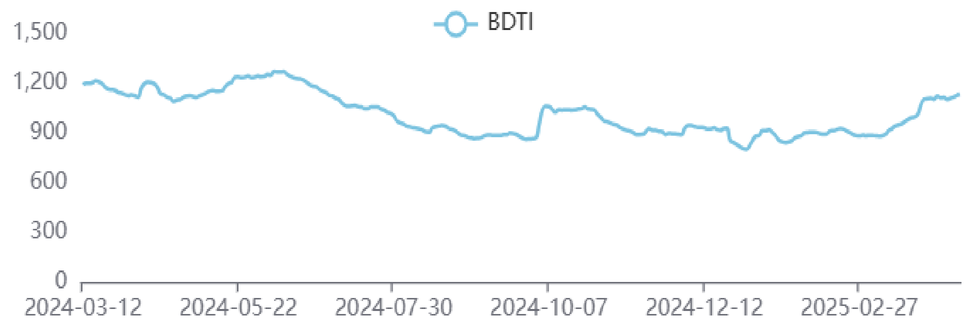
波罗的海干散货指数Baltic Dry Index

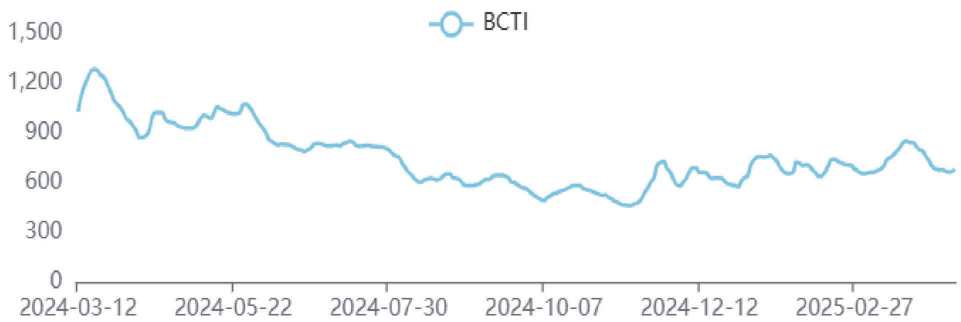
Type	PI	WoW	W%	M%	y%
BDI	1274	-215.0	-14.44	-23.67	-24.62
BCI	1803	-416.0	-18.75	-36.89	-27.15
BPI	1186	-239.0	-16.77	-13.11	-29.28
BSI	939	-32.0	-3.3	0.97	-25.54
BHSI	582	-31.0	-5.06	1.75	-19.61

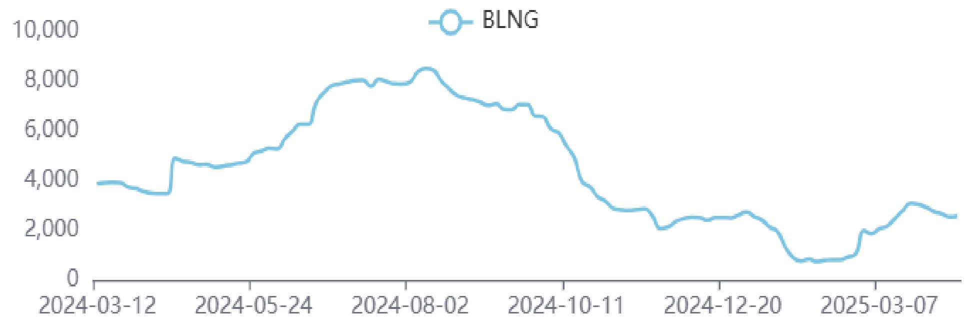


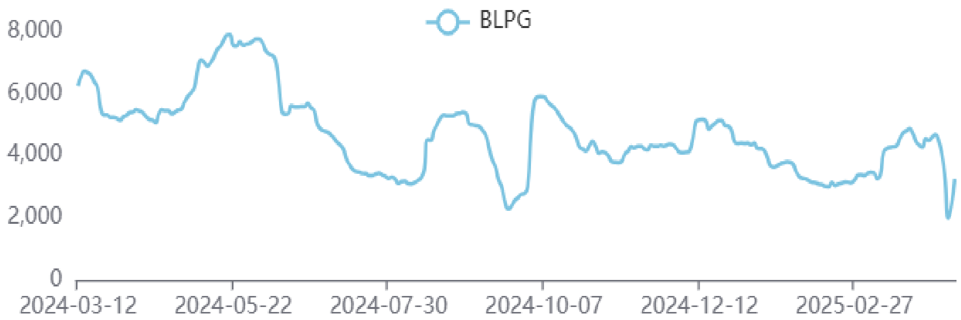
能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1132	20.0	1.8	20.3	-6.06
BCTI	679	3.0	0.44	-9.47	-22.04
BLNG	2560	-90.0	-3.4	3.64	-26.03
BLPG	3240	-1230.0	-27.52	-23.96	-39.81

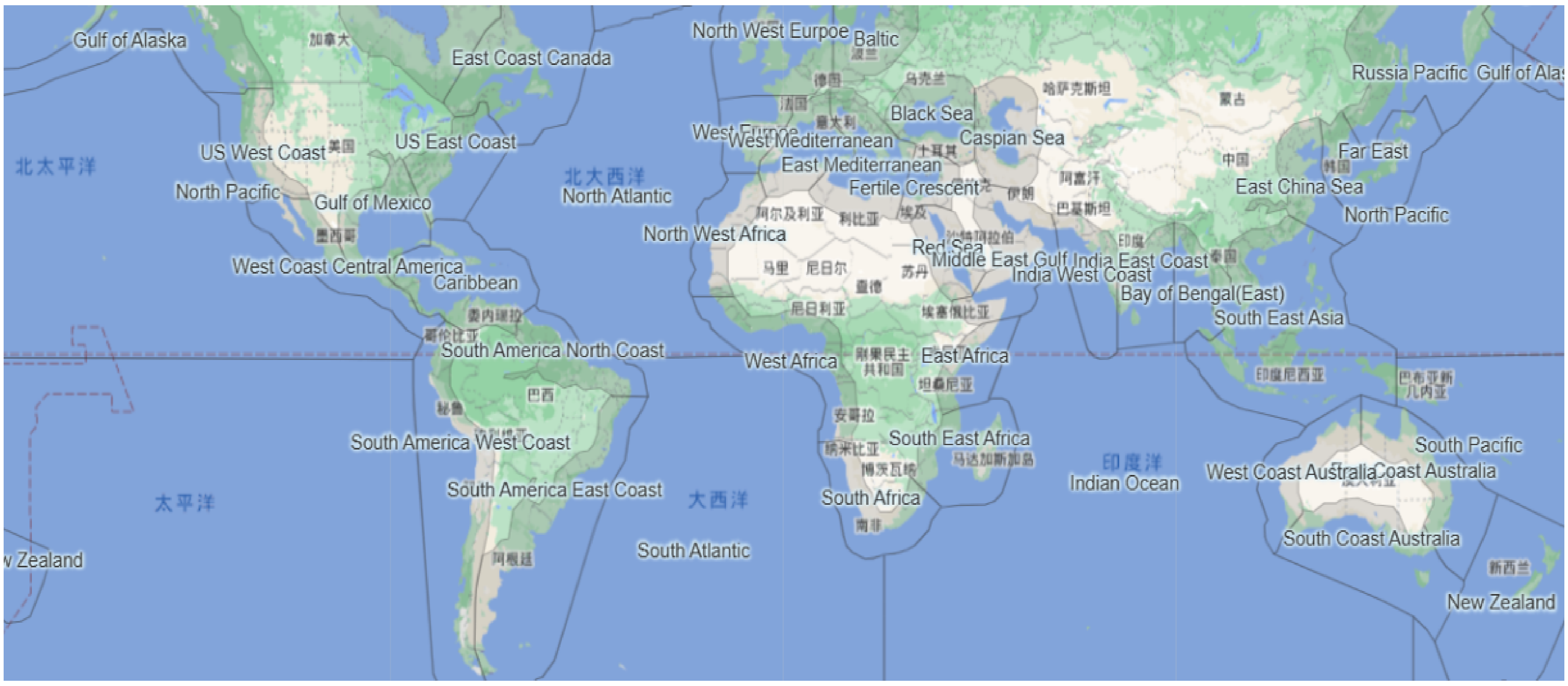








第四部分 运力分布 SUPPLY DISTRIBUTION

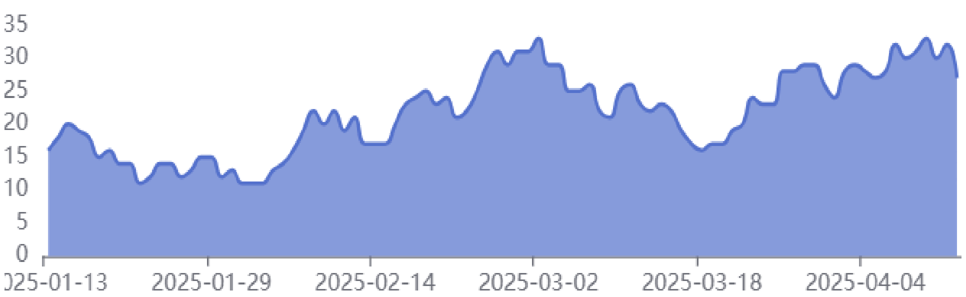


好望角型散货船 Capesize

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.

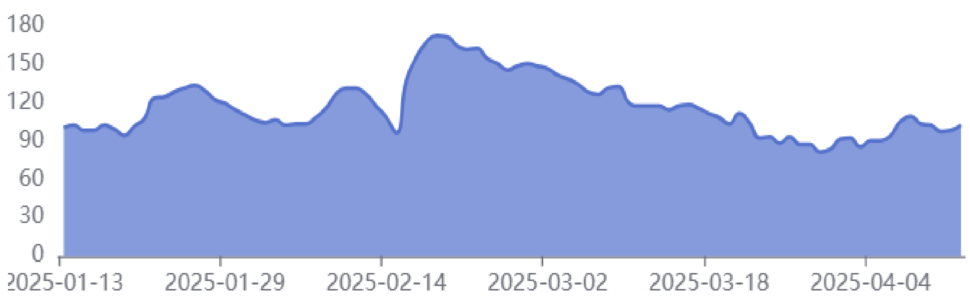
Type	M	T	W	Th	F	Sat	Sun
Cape	32	30	31	33	30	32	27



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.

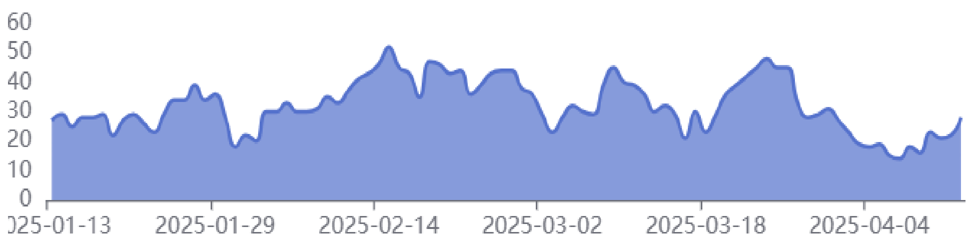
Type	M	T	W	Th	F	Sat	Sun
Cape	105	109	103	102	97	98	102



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	14	18	16	23	21	22	28

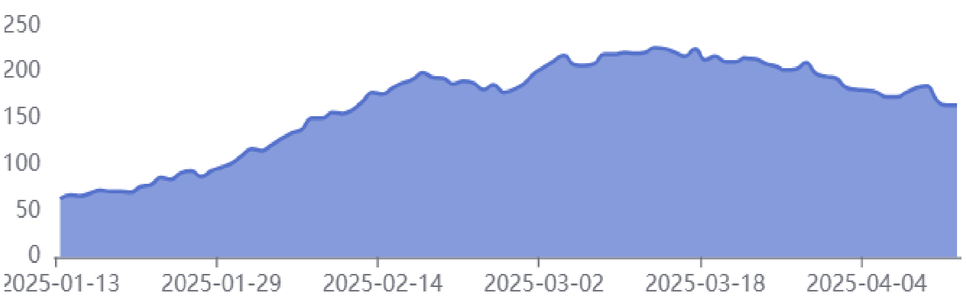


巴拿马型散货船 PANAMAX

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.

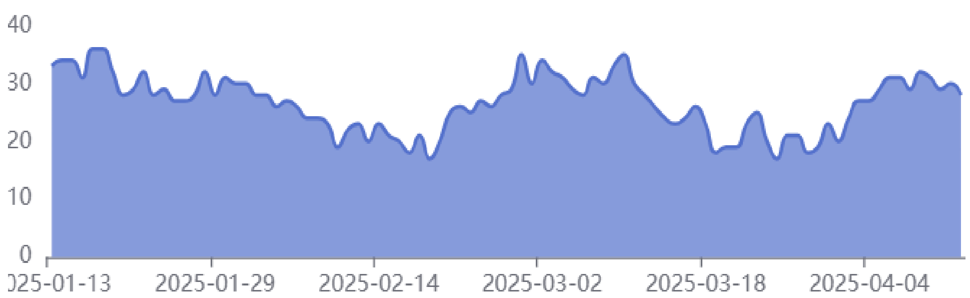
Type	M	T	W	Th	F	Sat	Sun
Pan.	173	178	183	185	169	164	164



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.

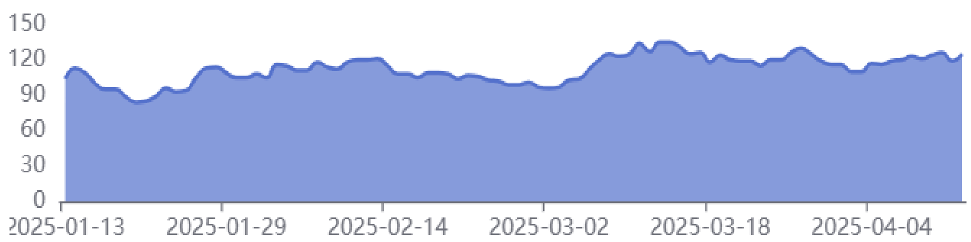
Type	M	T	W	Th	F	Sat	Sun
Pan.	17	16	17	16	12	13	11



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.	120	123	121	124	126	119	125

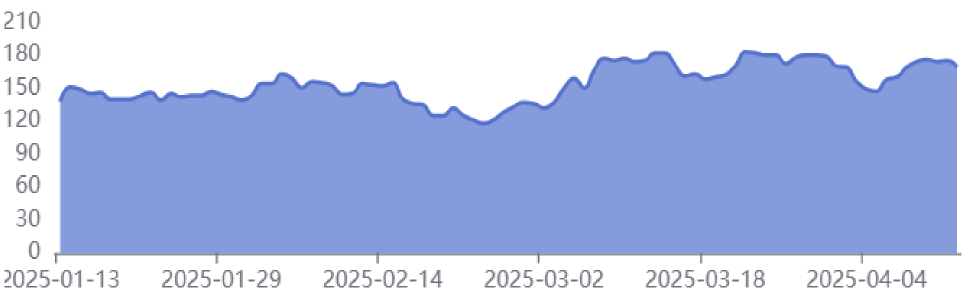


超大灵便型散货 SUPRAMAX

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.

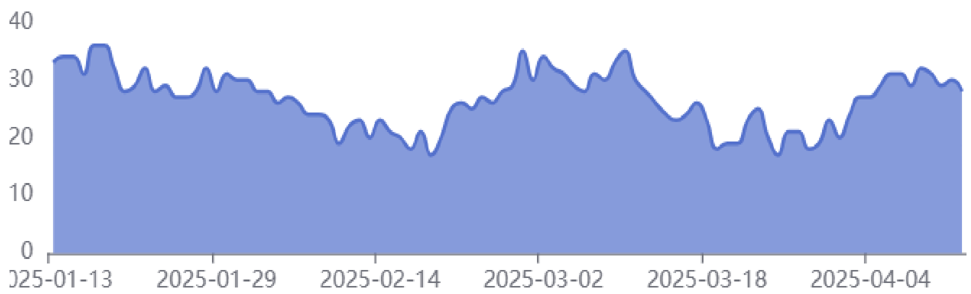
Type	M	T	W	Th	F	Sat	Sun
SMX	160	169	174	176	174	175	169



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.

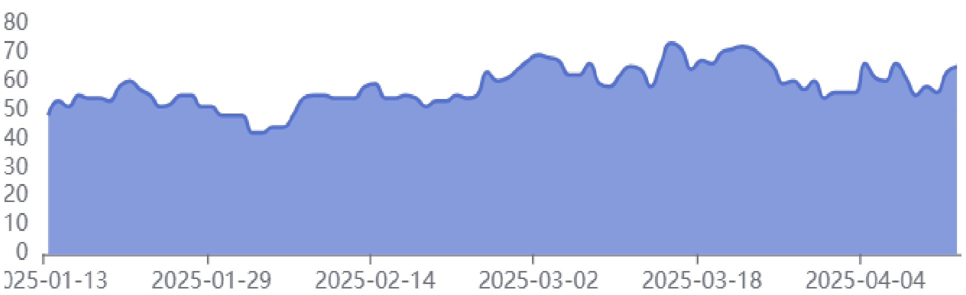
Type	M	T	W	Th	F	Sat	Sun
SMX	31	29	32	31	29	30	28



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.

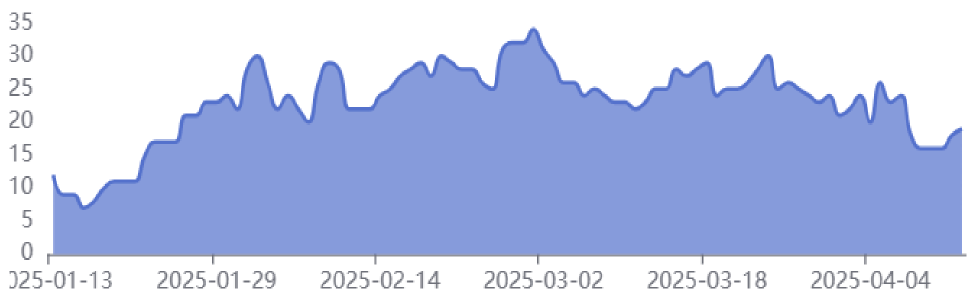
Type	M	T	W	Th	F	Sat	Sun
SMX	24	18	16	16	16	18	19



区域：南美的北部和东部。最近一周超大灵便型散货船准备装货船舶数量。

Area: South America. The latest week update number for Supramax with cargo loading intention.

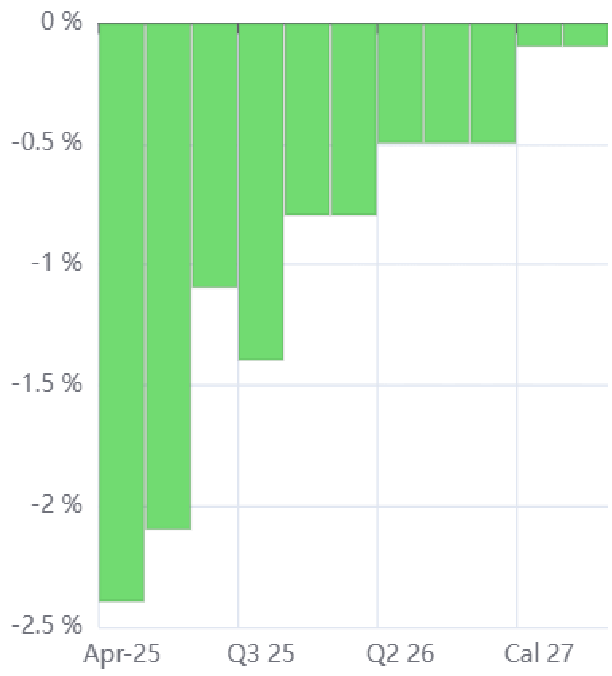
Type	M	T	W	Th	F	Sat	Sun
SMX	66	61	55	58	56	63	65

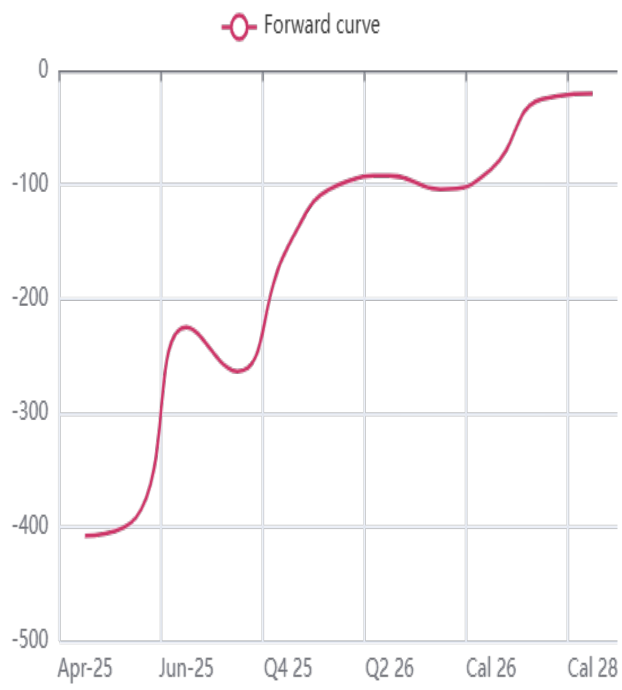


第五部分 远期运价协议 FFA

好望角型散货船Capesize

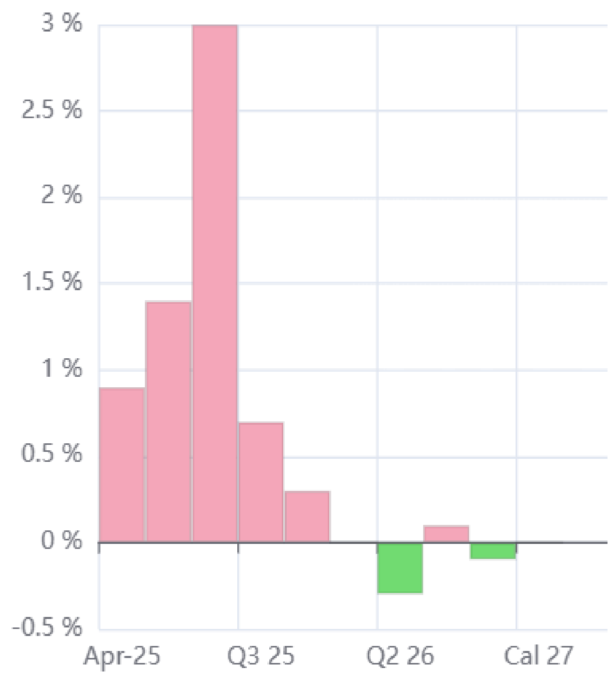
5TC	$/day	WoW	
Apr-25	16,513.00	-408.0	-2.4 %
May-25	18,296.00	-392.0	-2.1 %
Jun-25	19,358.00	-225.0	-1.1 %
Q3 25	19,178.00	-263.67	-1.4 %
Q4 25	20,367.00	-154.0	-0.8 %
Q1 26	12,013.00	-100.0	-0.8 %
Q2 26	17,596.00	-92.0	-0.5 %
Q3 26	21,267.00	-104.0	-0.5 %
Cal 26	18,169.00	-86.5	-0.5 %
Cal 27	19,050.00	-25.0	-0.1 %
Cal 28	18,888.00	-20.0	-0.1 %

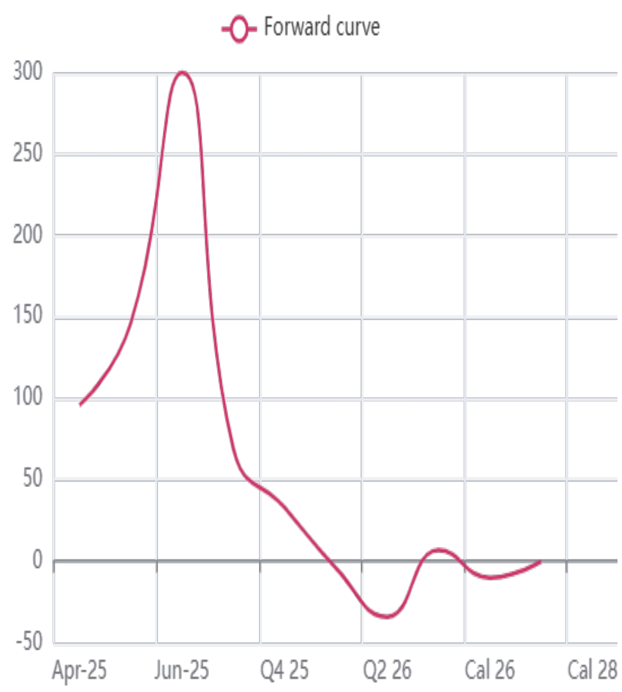




巴拿马型散货船Panamax

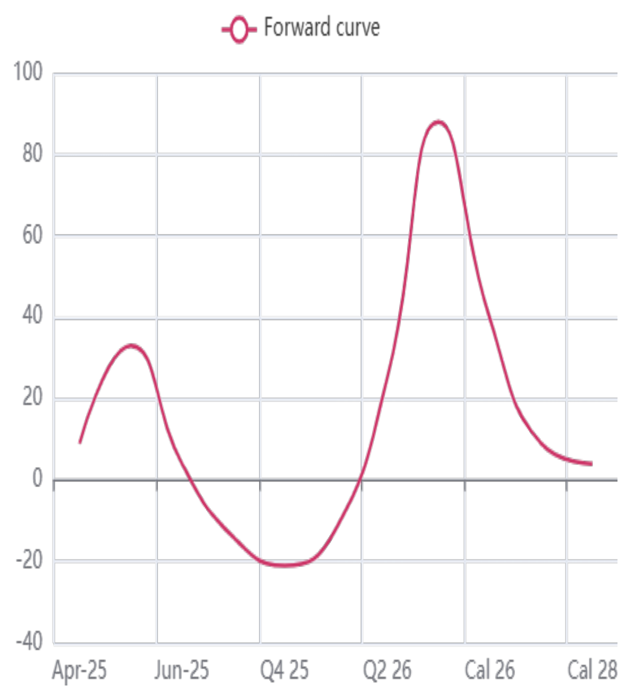
4TC	$/day	WoW	
Apr-25	10,321.00	96.0	0.9 %
May-25	10,454.00	146.0	1.4 %
Jun-25	10,458.00	300.0	3.0 %
Q3 25	10,287.33	69.33	0.7 %
Q4 25	9,933.00	33.0	0.3 %
Q1 26	8,775.00	-4.0	0.0 %
Q2 26	10,483.00	-34.0	-0.3 %
Q3 26	10,350.00	7.0	0.1 %
Cal 26	9,922.75	-10.0	-0.1 %
Cal 27	10,217.00	0.0	0.0 %
Cal 28	-	-	-





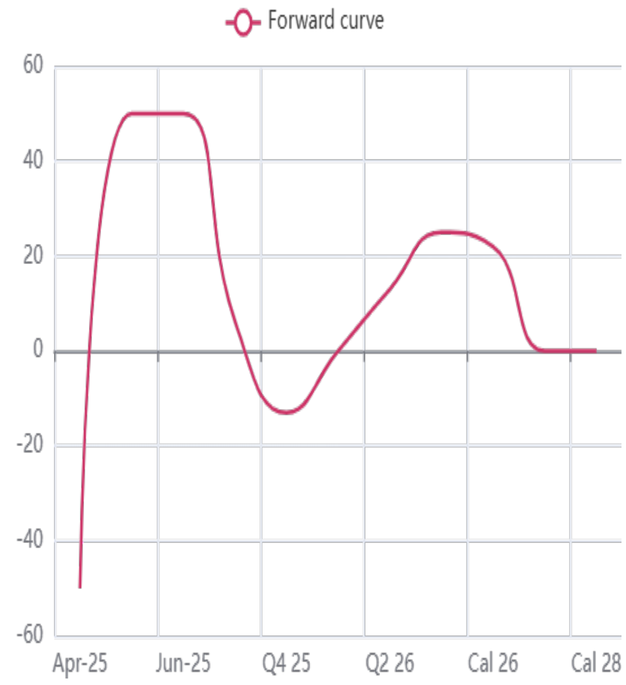
超大灵便型散货船Supramax

10TC	$/day	WoW	
Apr-25	10,217.00	9.0	0.1 %
May-25	10,483.00	33.0	0.3 %
Jun-25	10,454.00	4.0	0.0 %
Q3 25	10,364.00	-14.0	-0.1 %
Q4 25	10,067.00	-21.0	-0.2 %
Q1 26	8,767.00	-12.0	-0.1 %
Q2 26	10,396.00	25.0	0.2 %
Q3 26	10,796.00	88.0	0.8 %
10,085.50	Cal 26	39.75	0.4 %
Cal 27	10,392.00	9.0	0.1 %
Cal 28	10,633.00	4.0	0.0 %



灵便型散货船Handysize

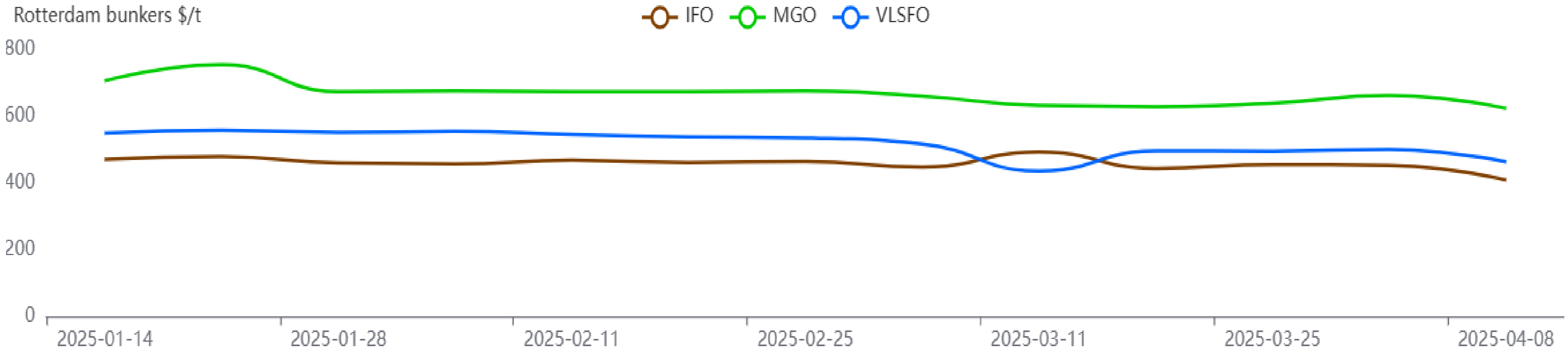
7TC	$/day	WoW	
Apr-25	10,388.00	-50.0	-0.5 %
May-25	10,200.00	50.0	0.5 %
Jun-25	10,213.00	50.0	0.5 %
Q3 25	10,285.67	6.33	0.1 %
Q4 25	9,975.00	-13.0	-0.1 %
Q1 26	8,725.00	0.0	0.0 %
Q2 26	9,913.00	13.0	13.0
Q3 26	10,513.00	25.0	0.2 %
Cal 26	9,875.25	22.0	0.2 %
Cal 27	10,300.00	0.0	0.0 %
Cal 28	10,513.00	0.0	0.0 %

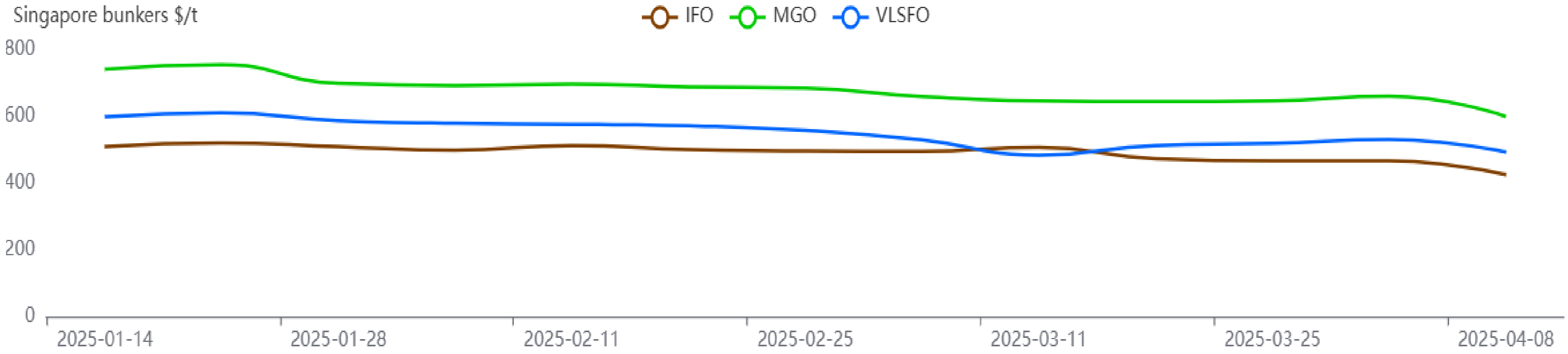


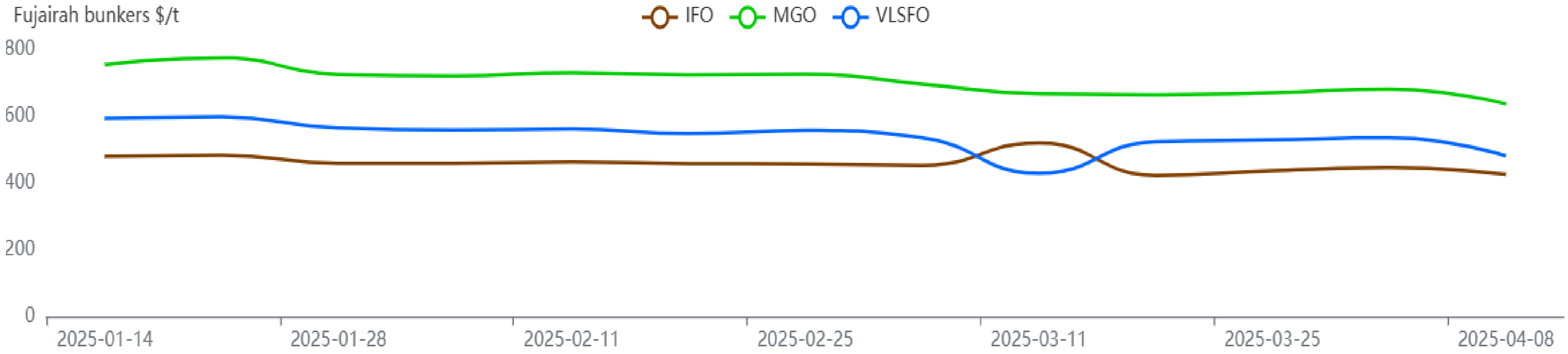
第六部分 燃油价格 BUNKER PRICE

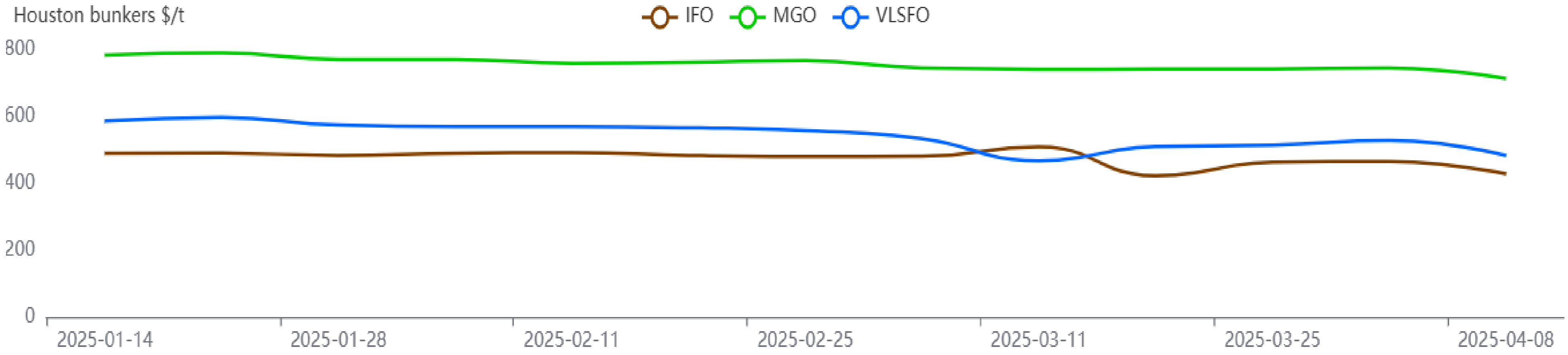
MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	498.5	443.5	652.5	55.0	8.5	18.28	120.0
Singapore	493.5	425.5	600.5	68.0	3.5	5.43	-389.36
Rotterdam	464.0	409.5	624.5	54.5	7.0	14.74	-193.97
Fujairah	482.5	426.5	638.5	56.0	-34.5	-38.12	-161.2
Houston	484.5	428.5	715.0	56.0	-7.5	-11.81	-234.94

(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	201.0		3.0	1.52	1.01	1.01
Maize	235.0		5.0	2.17	0.86	19.29
Soybeans	198.0		-8.0	-3.88	-2.94	-19.84
Rice	176.0		-3.0	-1.68	-2.76	-29.6
Barley	237.0		7.0	3.04	1.28	13.4
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	60.94	-10.23	-14.37	-7.74	-29.17
Brent	USD/Bbl	64.41	-10.12	-13.58	-7.14	-28.63
Natural Gas	USD/MMBtu	3.65	-0.46	-11.19	-18.89	106.21
Gasoline	USD/Gal	2.03	-0.26	-11.35	-2.87	-26.45
Heating Oil	USD/Gal	2.08	-0.21	-9.17	-4.59	-24.09
Ethanol	USD/Gal	1.8	0.05	2.86	5.88	8.43
Naphtha	USD/T	534.42	-74.86	-12.29	-11.01	-23.42
Propane	USD/Gal	0.79	-0.09	-10.23	-5.95	-7.06
Uranium	USD/Lbs	64.4	-0.2	-0.31	0.0	-25.98
Methanol	CNY/T	2476.0	-112.0	-4.33	-6.57	-0.84
TTF Gas	EUR/MWh	35.8	-5.03	-12.32	-13.59	33.98
UK Gas	GBp/thm	87.88	-10.66	-10.82	-13.47	33.66
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.26	-0.81	-15.98	-8.19	-0.23
Coal	USD/T	97.5	-5.5	-5.34	-6.79	-24.48
Steel	CNY/T	3060.0	-99.0	-3.13	-4.97	-8.87
Iron Ore	USD/T	100.85	-1.66	-1.62	-0.14	-1.13
Aluminum	USD/T	2377.9	-149.0	-5.9	-11.6	-3.59
Lithium	CNY/T	72400.0	-1700.0	-2.29	-3.34	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	3005.7	-125.83	-4.02	3.69	28.72
Silver	USD/t.oz	30.26	-3.72	-10.95	-6.05	8.85
Platium	null	905.7	-95.0	-9.49	-5.35	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.09		0.01	0.93	0.0	0.93
USD/CNY	7.36		0.08	1.1	1.66	1.52

第八部分 本周话题 WEEKLY TOPIC

IMO组织MEPC83通过温室气体排放控制框架

2025年4月上旬，MARPOL公约附则VI关于IMO净零框架的修正案草案最终投票通过。（79方有立场投票（弃权不记入），63赞成, 16反对）。这是国际海事组织（IMO）二十年来又一次胜利。
MEPC83会议通过了温室气体燃料强度（GHG Fuel Intensify-GFI）两级减排目标:
- 以2008年GFI参考值（93.3 gCO□eq/MJ）为基准，设定"基础目标（Base target GFI）"和"直接合规目标 (Direct Compliance target GFI)"。
- 未达标将产生合规赤字，需支付罚款：
- 一级赤字（未达直接目标）：100美元/吨CO□当量；
- 二级赤字（未达基础目标）：380美元/吨CO□当量。
MEPC83的零排放激励（ZNZs）
- 2034年前，GFI阈值≤19.0g CO□当量/MJ的船舶可获净零奖励（如IMO基金补助）。
MEPC83确定的合规机制
- 允许通过转移/存储盈余单位（Surplus Unite-SU）或购买补救单位（Remedial Unit-RU ）弥补赤字。
MEPC83实施时间表
- 2028-2030年启动两级目标与罚款机制，2034年收紧ZNZs标准。
航运公司如何应对：
1. 积极减排路线
- 投资绿色燃料（如氢、氨）和节能技术，提前达到"直接合规目标"，生成SU用于存储、交易或抵消未来赤字。
- 争取ZNZs资格以获取奖励，同时降低长期燃料成本。
2. 基础目标路线（中小公司主流选择）
- 接受一级罚款（100美元/吨），依赖生物燃料和现有节能设备（如优化船体设计、安装节能装置）实现30%减排。
3. 灵活合规策略
- 利用RU交易市场平衡赤字，或向IMO净零基金捐款获取SU。
- 探索技术组合（如混合燃料+节能设备）降低综合成本。
MEPC83对航运存在关键影响，高罚款机制倒逼行业脱碳，绿色燃料和技术供应商将成受益方，中小船东短期压力显著，但可通过灵活策略过渡。
MEPC83 adopted two emission reduction targets for GHG Fuel Intensify-GFI:
- Set "Base target GFI" and "Direct Compliance target GFI" based on the 2008 GFI reference value (93.3 gCO□eq/MJ).
- Failure to meet the requirements will result in a compliance deficit and a penalty:
- Primary deficit (short of direct target) : US $100 / ton CO□ equivalent;
- Secondary deficit (short of base target) : US $380 / ton CO□ EQ.
Zero Emission Incentive (ZNZs) for MEPC83
- Until 2034, ships with a GFI threshold ≤19.0g CO□ equivalent /MJ are eligible for net zero incentives (e.g. IMO fund grants).
Compliance mechanisms identified by MEPC83
- Allow to repair the deficit by transferring/storing Surplus units-su or purchasing Remedial Units-RU.
MEPC83 Implementation Schedule
A two-tier target and penalty mechanism will be launched from 2028 to 2030, and ZNZs standards will be tightened in 2034.
Shipping Company how to response:
1. Active emission reduction path
- Invest in green fuels (such as hydrogen, ammonia) and energy efficient technologies to meet "direct compliance targets" ahead of time, generating SU for storage, trading or offsetting future deficits.
- Qualify for ZNZs to earn rewards while reducing long-term fuel costs.
2. Basic target route (mainstream choice for smes)
- Subject to a Level 1 fine ($100 / ton), relying on biofuels and existing energy-saving equipment (such as optimizing hull design, installing energy-saving devices) to achieve a 30% reduction in emissions.
3. Flexible compliance policy
- Use the RU trading market to balance the deficit or make a contribution to the IMO Net Zero Fund to obtain SU.
- Explore technology combinations (e.g., blended fuels + energy efficient equipment) to reduce overall costs.
MEPC83 has a key impact on shipping, with high fines forcing the industry to decarbonize, green fuel and technology suppliers will be the beneficiaries, and small and medium-sized shipowners will face significant short-term pressure, but can transition through flexible strategies.