



2025年 第22周市场周报

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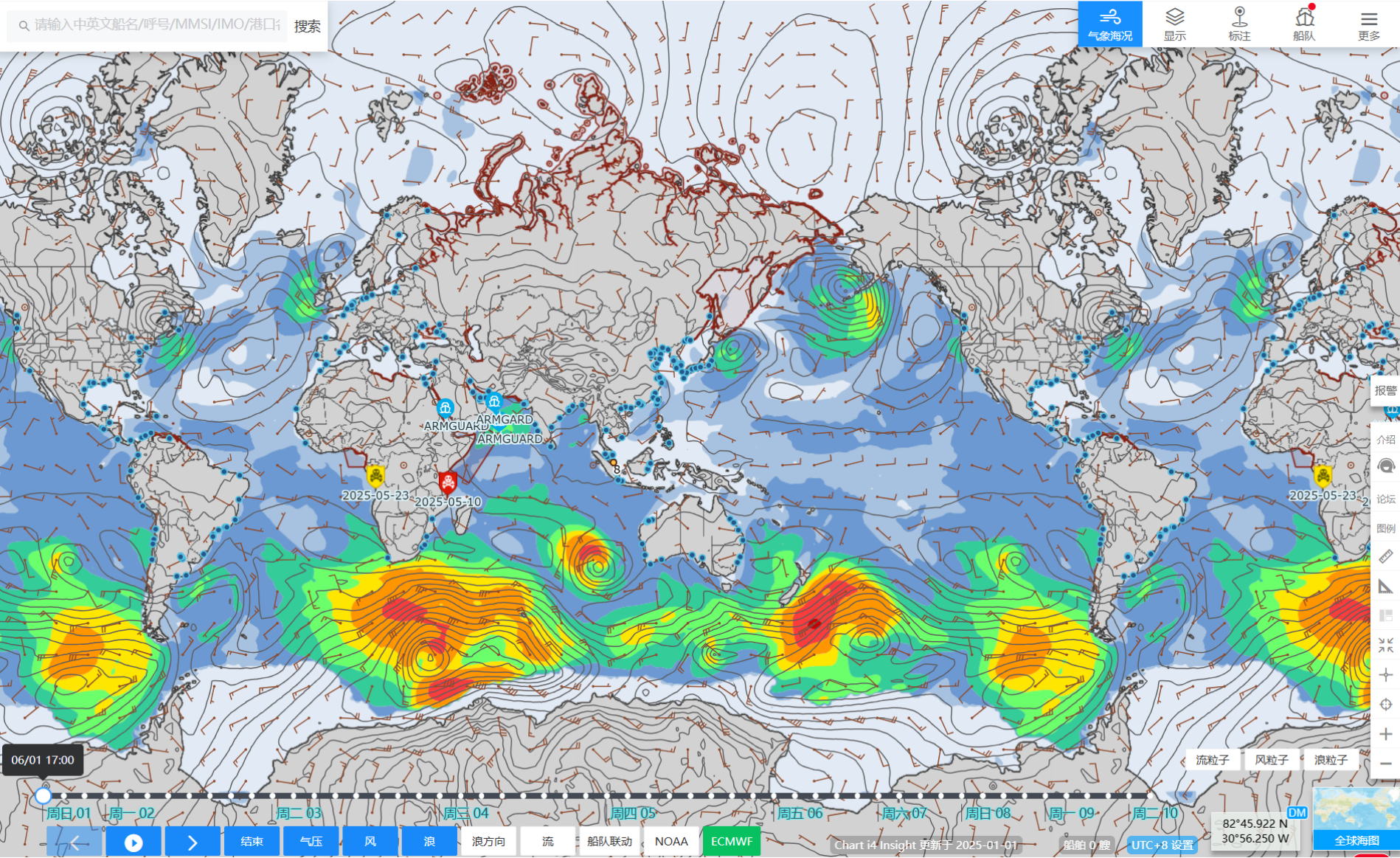
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本周话题 WEEKLY TOPIC

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410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 410 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3-4级，轻浪；黄海风力3-4级，轻浪；东海风力4-5级，中浪；台湾海峡4-5级风，中浪；南海大部海域风力3-4级，中浪。太平洋北部和北大西洋的低气压开始减弱。The coming week the wind in Bohai Sea is breeze with slight sea. Wind in Yellow Sea is breeze with slight sea. And China East Sea will become fresh with moderate sea. The wind in the Taiwan Strait will be fresh with moderate sea. In most of the South China Sea the wind is moderate with moderate sea. The low pressure activities become small and gentle both in North of Pacific and Atlantic.

海盗事件 Piracy

5月23日，安哥拉罗安达外锚地，在例行巡查中，一艘停泊油轮的大副发现船首楼的储藏室被人闯入。警报响起，船员们被召集起来，展开了搜索。据报道，船上的财产被盗了。23.05.2025: 0255 UTC: Posn: 08:44.4S – 013:18.2E, Luanda Outer Anchorage, Angola. During routine rounds, the chief officer on an anchored tanker discovered that the forecandle storeroom had been broken into. Alarm was raised, the crew was mustered, and a search was conducted. It was reported that ship's properties had been stolen.

海上事件 Marine Incidents

5月22日，一艘集装箱船在一名挪威男子的前花园里搁浅，事故发生时，该船的值班人员正在睡觉。挪威警方逮捕了这名乌克兰海员，并指控其玩忽职守。这艘862箱位的NCL Salten号（2002年建造）于上周四在特隆赫姆附近的峡湾搁浅。On May 22nd, a container ship ran aground in the front garden of a Norwegian man. At the time of the accident, the duty personnel of the ship were sleeping. Norwegian police arrested the Ukrainian officer and accused him of dereliction of duty. The 862-container NCL Salten (built in 2002) ran aground in the fjord near Trondheim last Thursday.

其它 Others

没有 Nil

备注 Remark

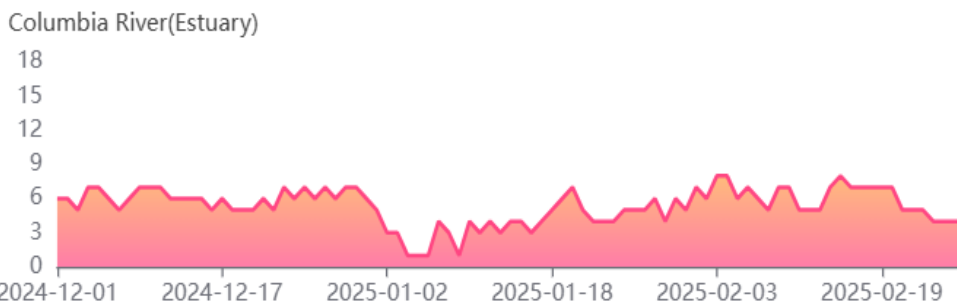
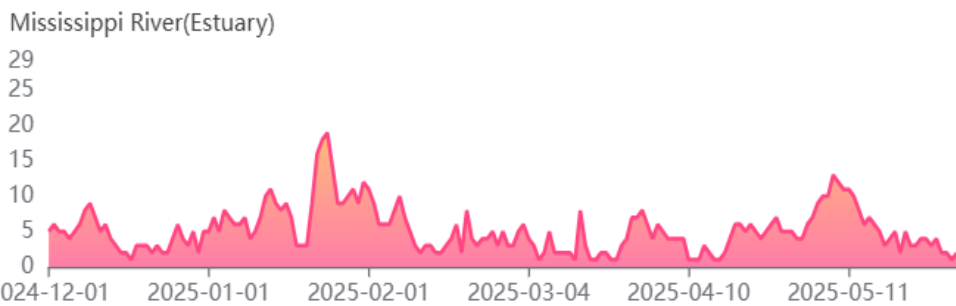
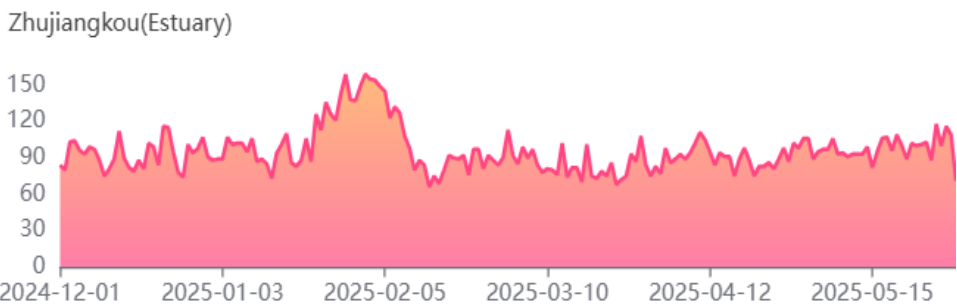
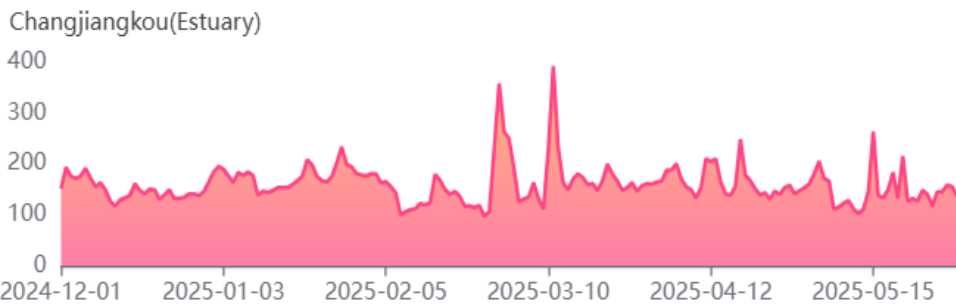
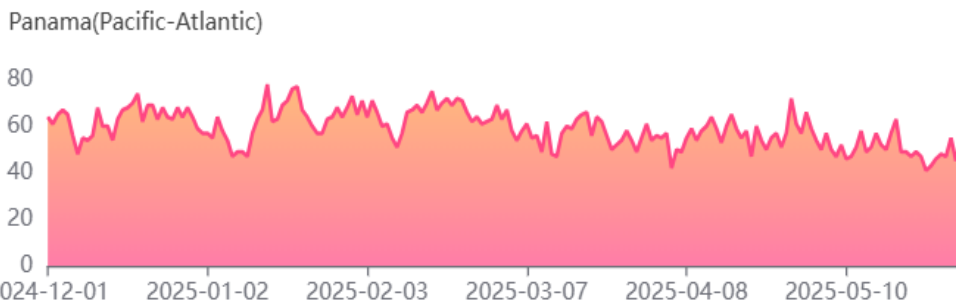
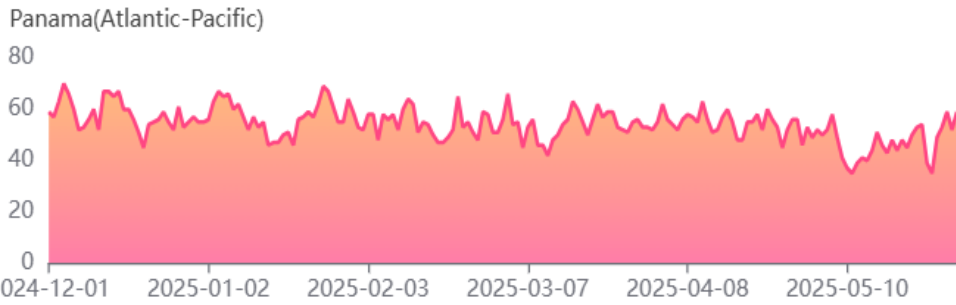
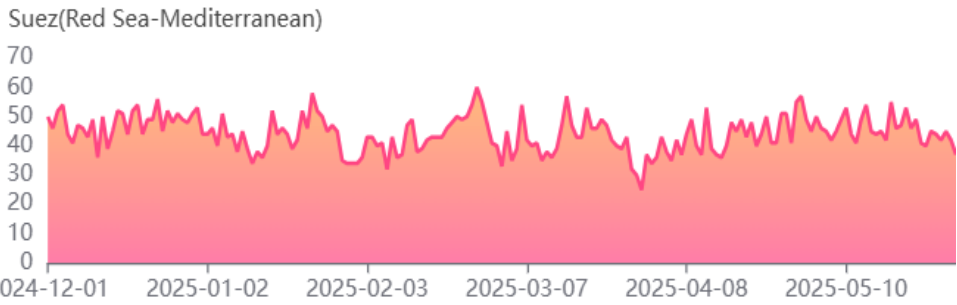
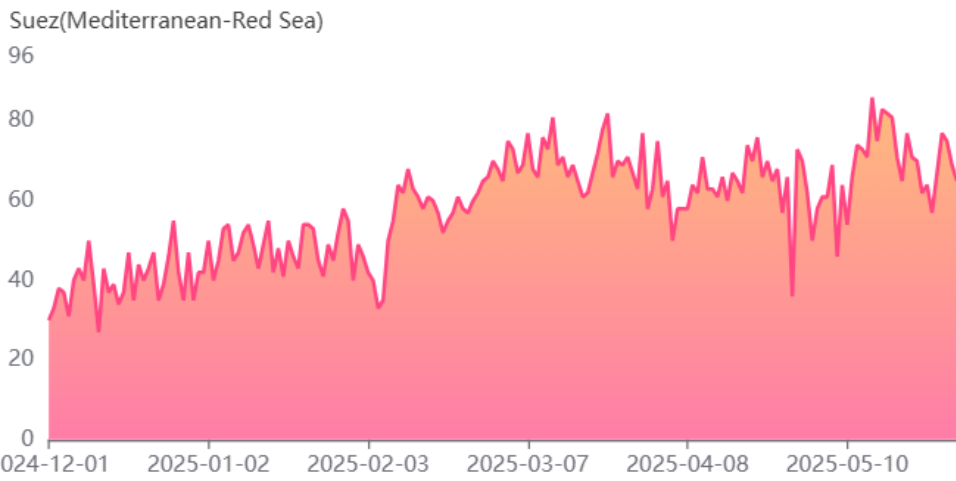
本报告数据截止时间为2025年6月01日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on June 01st of 2025; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	1326	-43	24
Miss.Riv.	2	172	-7	54
CJK	136	4231	-68	-493
Pa.Atlan.	59	1366	15	-200
Colum.Riv.	2	136	-10	-25
Suez.Med.	65	1994	-43	155
Pa.Pac.	45	1457	-39	-201
ZJK	71	2843	2	166

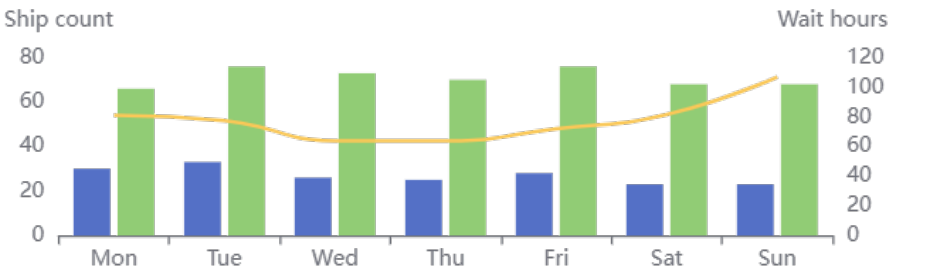
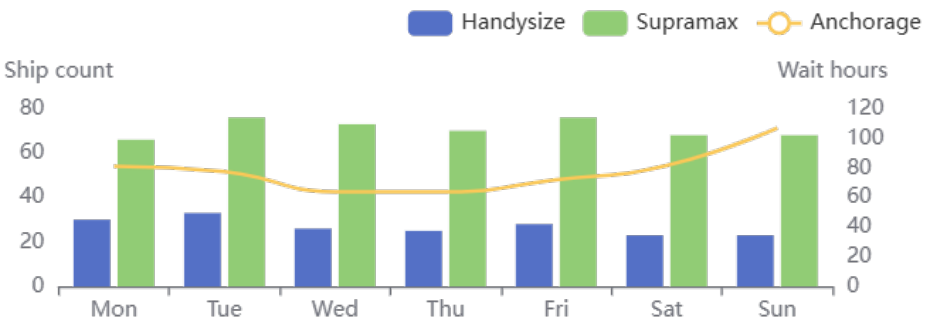


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

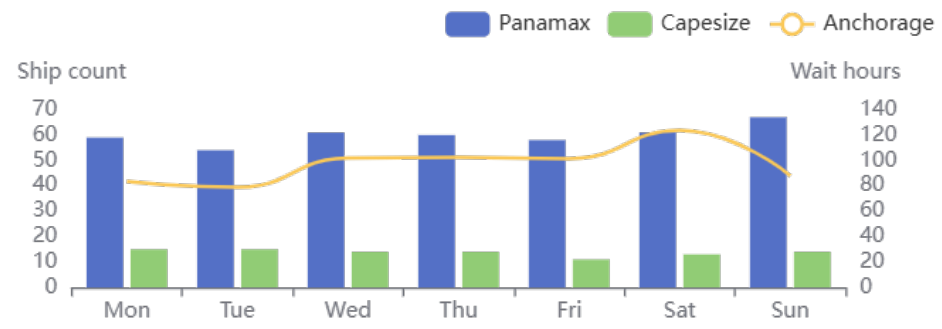
Type	M	T	W	Th	F	Sat	Sun
HDY	30	33	26	25	28	23	23
SMX	66	76	73	70	76	68	68
WT.h.	81.1	77.5	63.9	63.8	72.0	81.6	107



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

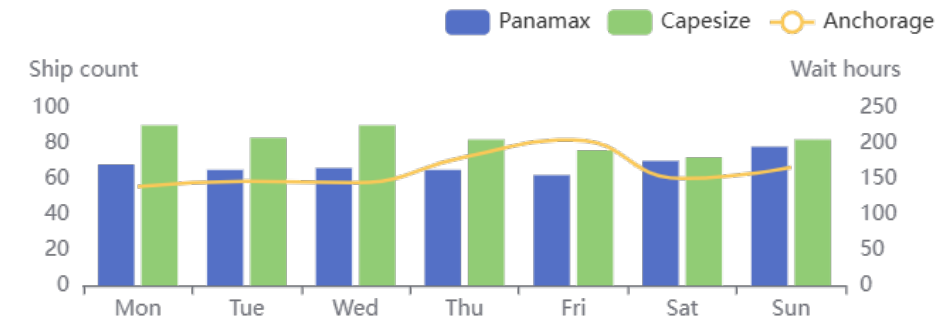
Type	M	T	W	Th	F	Sat	Sun
Pan.	59	54	61	60	58	61	67
Cap	15	15	14	14	11	13	14
WT.h.	83.4	78.9	101.9	102.4	101.5	123.7	88



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

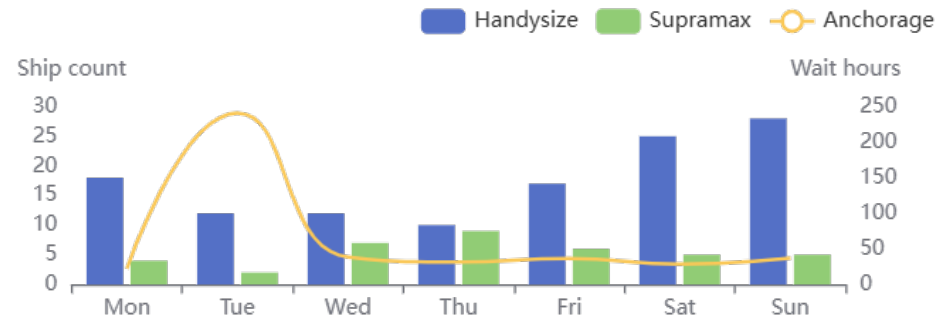
Type	M	T	W	Th	F	Sat	Sun
Pan.	68	65	66	65	62	70	78
Cap	90	83	90	82	76	72	82
WT.h.	139.2	146.5	144.6	180.6	204.6	150.3	166



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

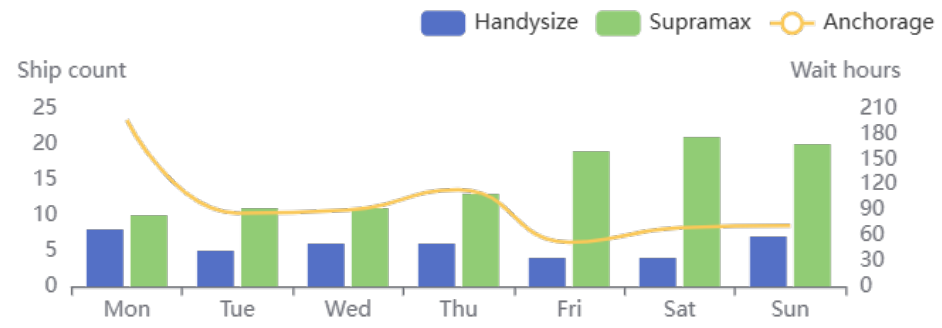
Type	M	T	W	Th	F	Sat	Sun
HDY	18	12	12	10	17	25	28
SMX	4	2	7	9	6	5	5
WT.h.	22.25	241	38.5	31.5	36.7	28.7	37



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

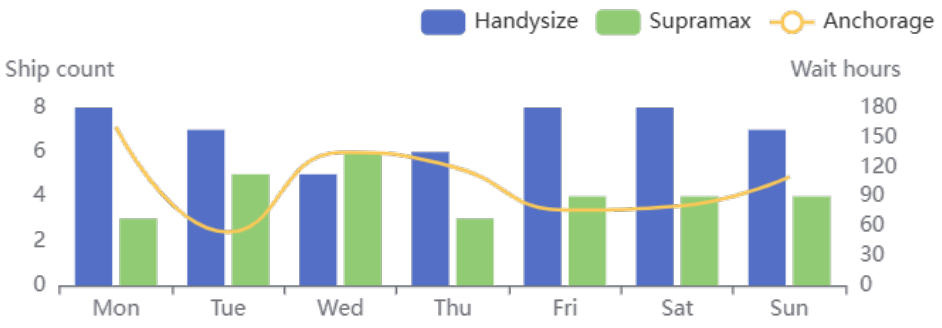
Type	M	T	W	Th	F	Sat	Sun
HDY	8	5	6	6	4	4	7
SMX	10	11	11	13	19	21	20
WT.h.	196.3	86.65	90.2	114.2	52.2	69.3	72



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

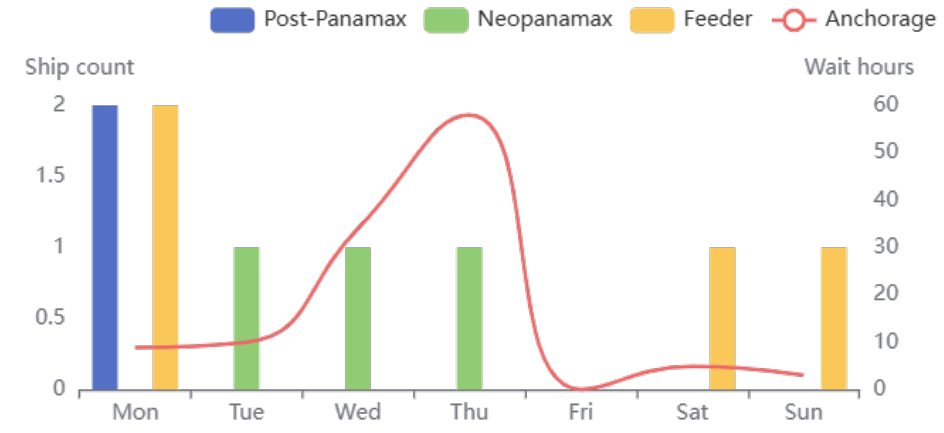
Type	M	T	W	Th	F	Sat	Sun
HDY	8	7	5	6	8	8	7
SMX	3	5	6	3	4	4	4
WT.h.	160.3	53.9	134.6	120.3	76.3	80.2	110



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

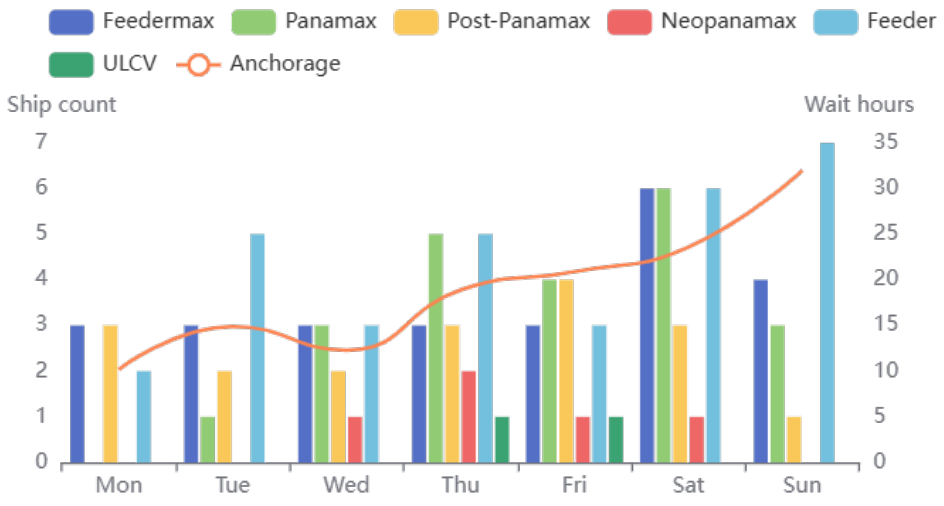
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	0	0
Pan.	0	0	0	0	0	0	0
PPx	2	0	0	0	0	0	0
NPx	0	1	1	1	0	0	0
Fd	2	0	0	0	0	1	1
WT.h.	8.85	10	34	58	0.0	4.9	3
Ulcw	0	0	0	0	0	0	0



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

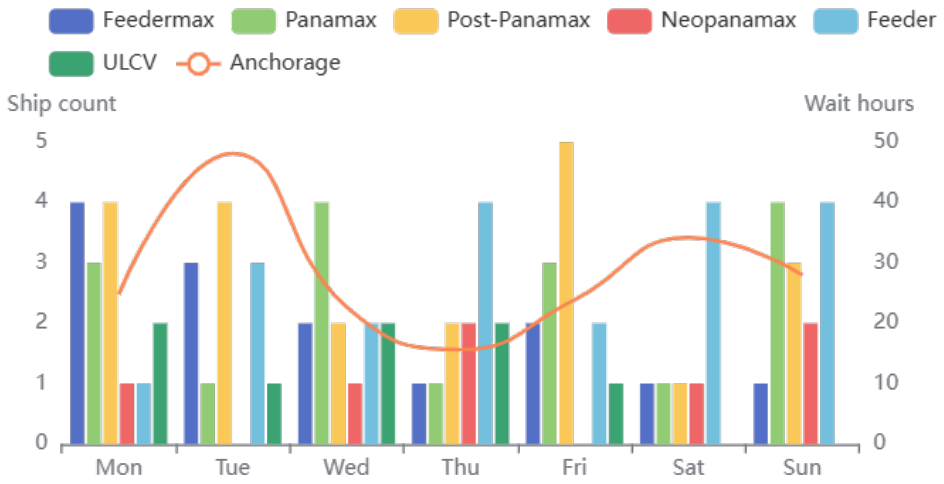
Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	3	3	3	3	6	4
Pan.	0	1	3	5	4	6	3
PPx	3	2	2	3	4	3	1
NPx	0	0	1	2	1	1	0
Fd	2	5	3	5	3	6	7
Ulcw	0	0	0	1	1	0	0
WT.h.	10.2	14.9	12.3	18.9	20.9	23.6	32



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

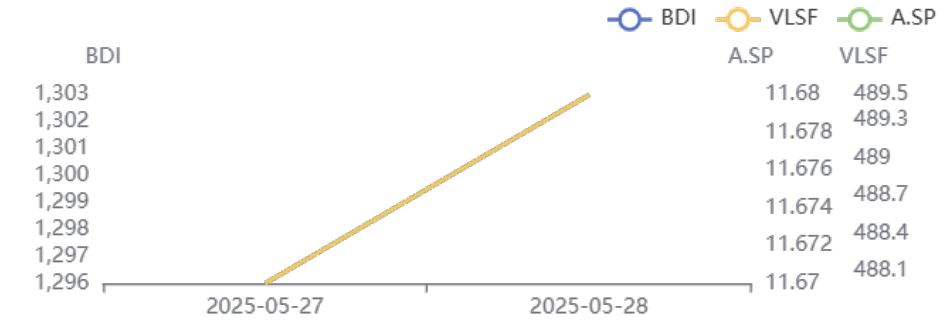
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	3	2	1	2	1	1
Pan.	3	1	4	1	3	1	4
PPx	4	4	2	2	5	1	3
NPx	1	0	1	2	0	1	2
Fd	1	3	2	4	2	4	4
Ulcw	2	1	2	2	1	0	0
WT.h.	24.8	48.1	22.7	15.65	23.9	34.2	28



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

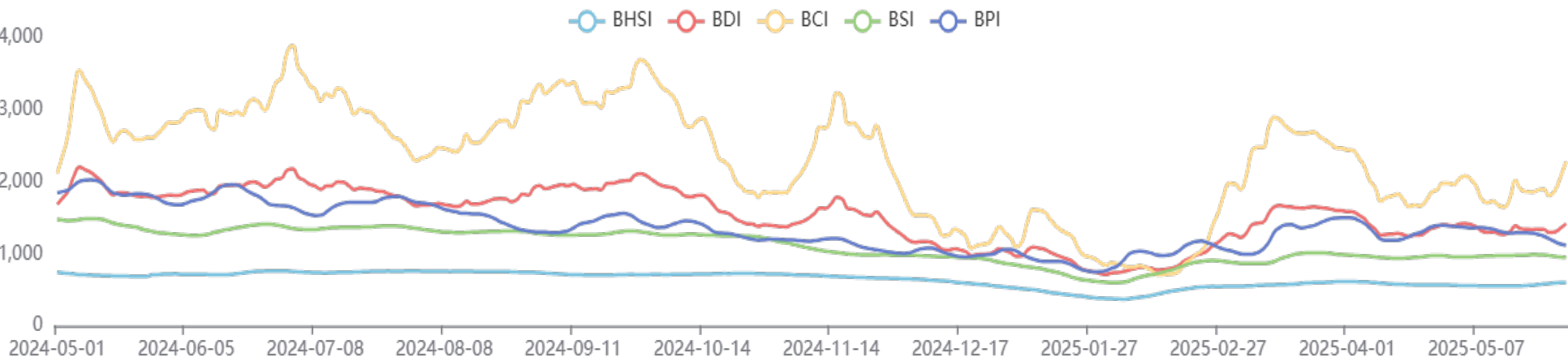
Type	M	T	W	Th	F	Sat	Sun
BDI	1208	1169	1137				
VLSF	490.00	488.00	489.50				
A.SP	11.7	11.67	11.68	11.61	11.57	11.56	



第三部分 航运市场 SHIPPING MARKET

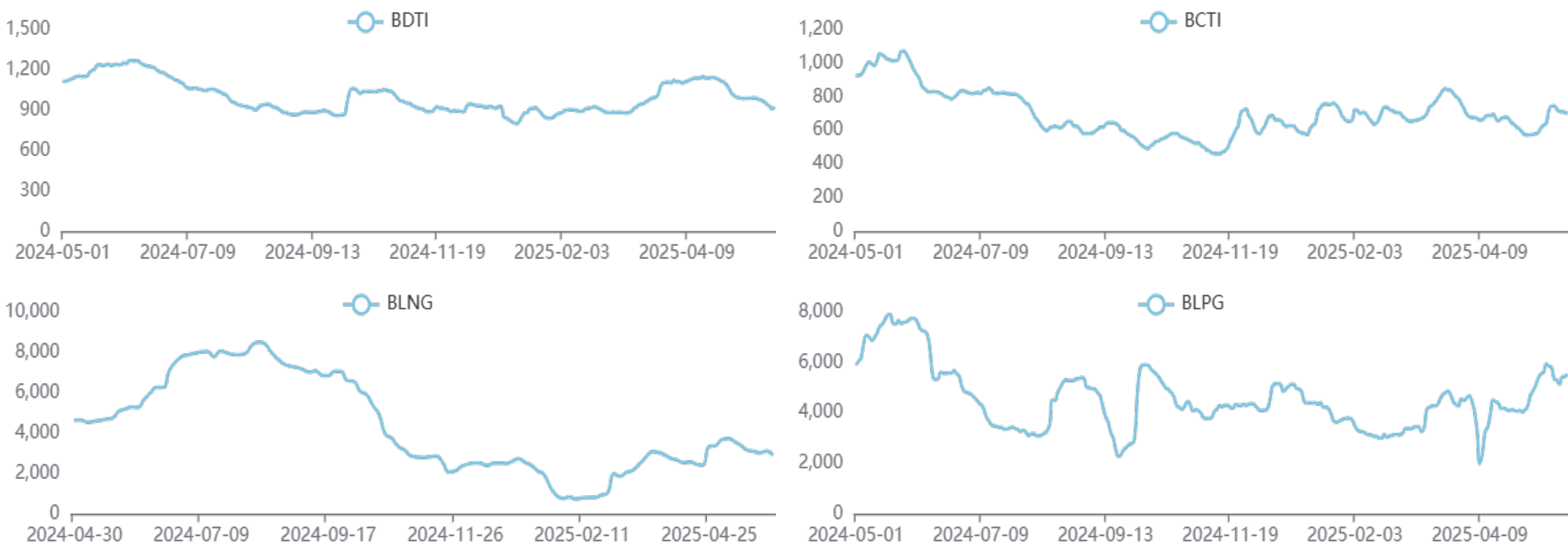
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1418	78.0	5.82	-0.21	-21.27
BCI	2277	377.0	19.84	9.52	-17.2
BPI	1119	-127.0	-10.19	-18.2	-34.87
BSI	951	-32.0	-3.26	-0.42	-26.05
BHSI	601	20.0	3.44	7.32	-16.3



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	922	-40.0	-4.16	-15.02	-25.28
BCTI	698	-26.0	-3.59	15.18	-33.71
BLNG	2900	-110.0	-3.65	-21.05	-45.11
BLPG	5526	237.0	4.48	35.21	-27.37



第四部分 运力分布 SUPPLY DISTRIBUTION

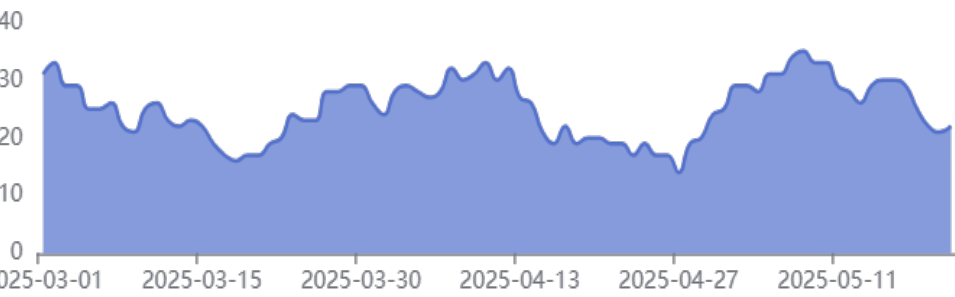


好望角型散货船 Capesize

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	30	30	29	25	22	21	22



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.

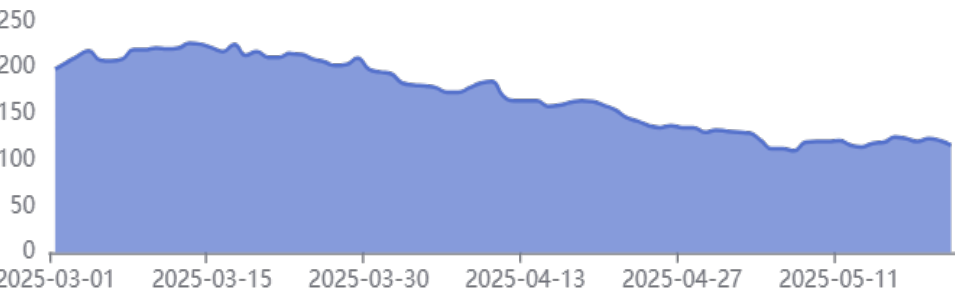
Type	M	T	W	Th	F	Sat	Sun
Cape	45	44	48	49	46	43	41

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.

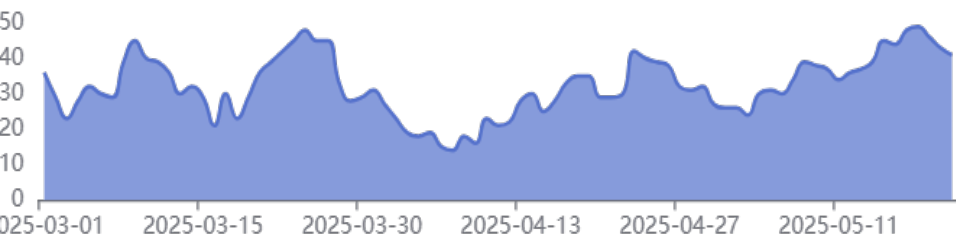
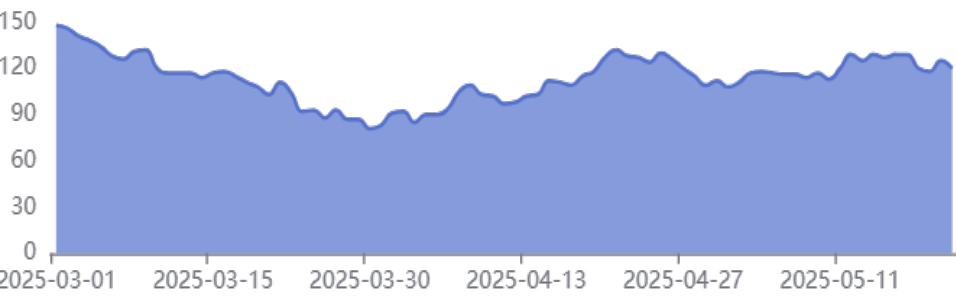
Type	M	T	W	Th	F	Sat	Sun
Pan.	119	125	123	120	123	121	116



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.

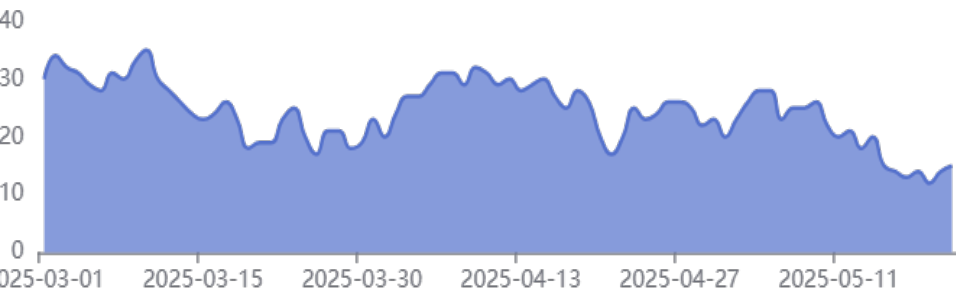
Type	M	T	W	Th	F	Sat	Sun
Cape	127	129	129	120	118	125	120



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.

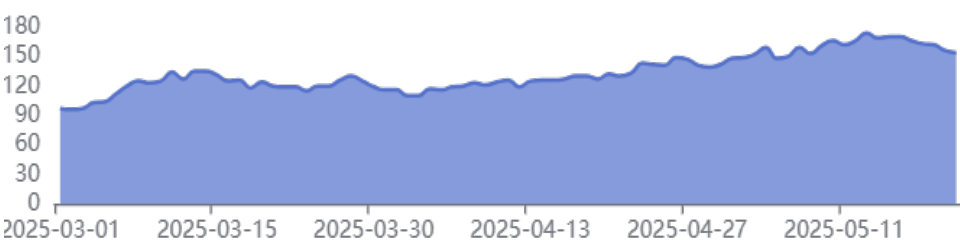
Type	M	T	W	Th	F	Sat	Sun
Pan.	7	6	8	9	10	9	10



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.	170	170	166	163	162	156	154

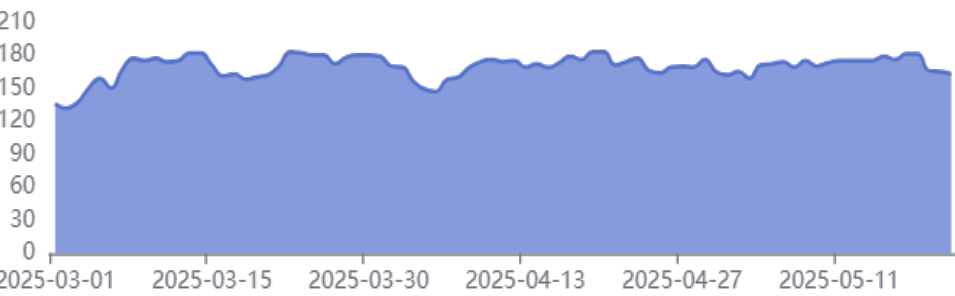


超大灵便型散货 SUPRAMAX

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.

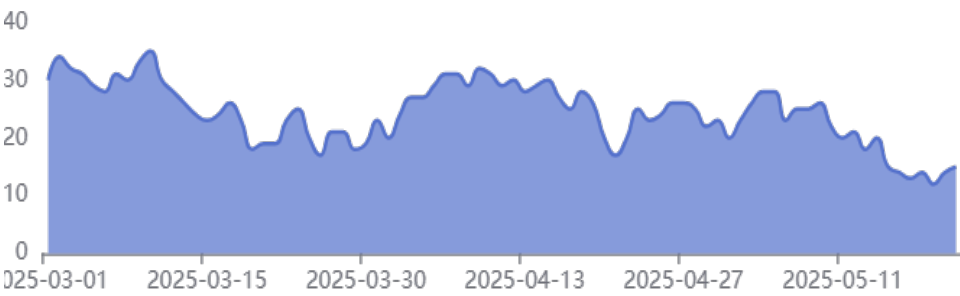
Type	M	T	W	Th	F	Sat	Sun
SMX	179	176	181	181	166	165	163



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.

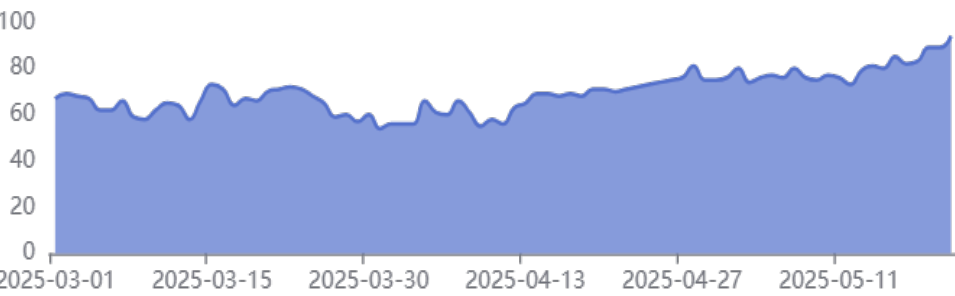
Type	M	T	W	Th	F	Sat	Sun
SMX	15	14	13	14	12	14	15



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.

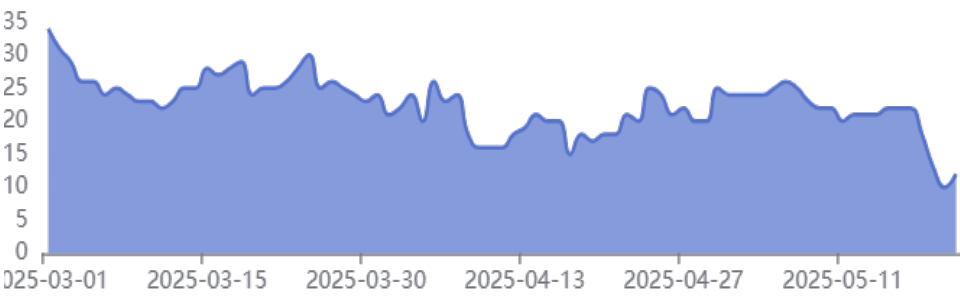
Type	M	T	W	Th	F	Sat	Sun
SMX	22	22	22	18	13	10	12



区域：南美的北部和东部。最近一周超大灵便型散货船准备装货船舶数量。

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

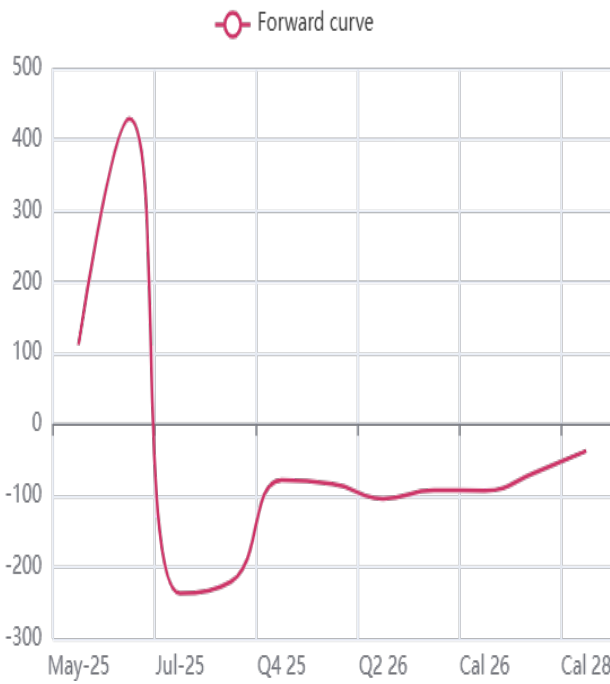
Type	M	T	W	Th	F	Sat	Sun
SMX	80	85	82	83	89	89	94



第五部分 远期运价协议 FFA

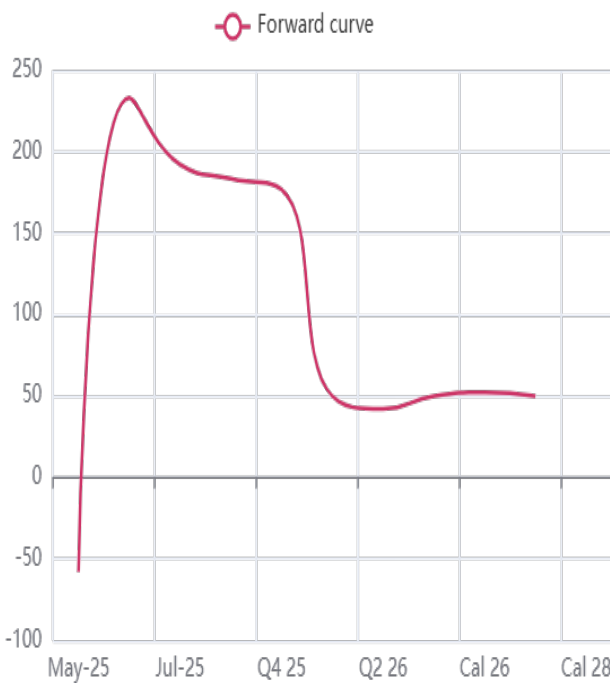
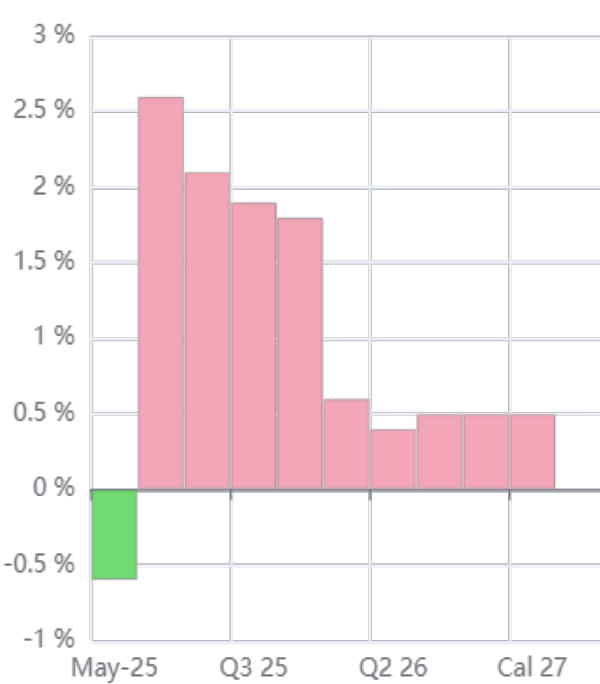
好望角型散货船Capesize

5TC	\$/day	WoW	
May-25	15,674.90	111.9	0.7 %
Jun-25	19,233.00	429.0	2.3 %
Jul-25	17,738.00	-237.0	-1.3 %
Q3 25	18,143.33	-220.67	-1.2 %
Q4 25	19,647.33	-78.0	-0.4 %
Q1 26	12,046.00	-83.0	-0.7 %
Q2 26	17,267.00	-104.0	-0.6 %
Q3 26	20,608.00	-92.0	-0.4 %
Cal 26	17,711.50	-92.75	-0.5 %
Cal 27	18,704.00	-67.0	-0.4 %
Cal 28	18,621.00	-37.0	-0.2 %



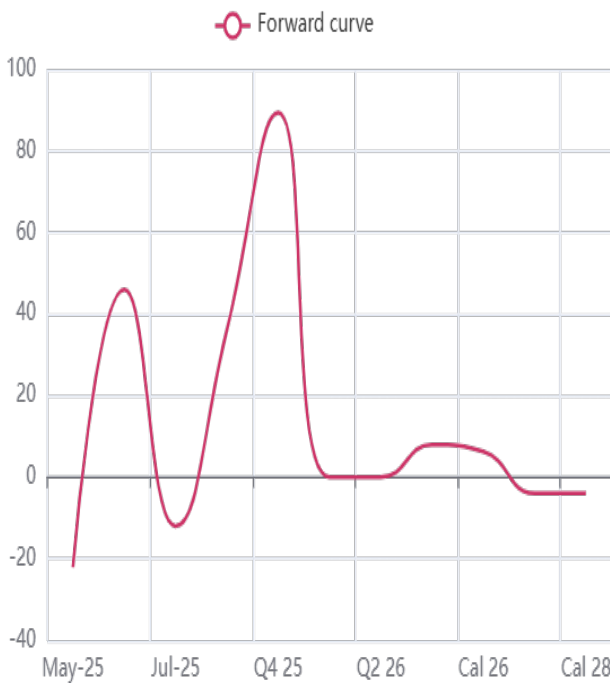
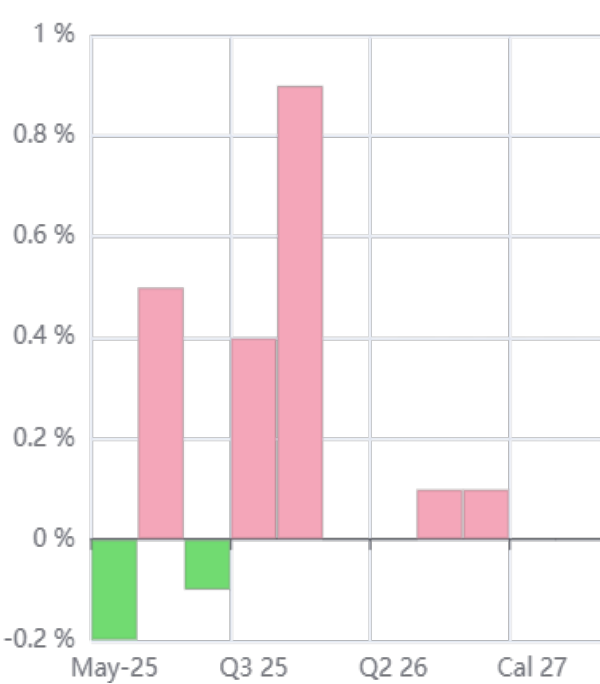
巴拿马型散货船Panamax

4TC	\$/day	WoW	
May-25	10,242.20	-57.8	-0.6 %
Jun-25	9,171.00	233.0	2.6 %
Jul-25	9,425.00	192.0	2.1 %
Q3 25	9,818.00	183.33	1.9 %
Q4 25	10,055.67	176.67	1.8 %
Q1 26	8,375.00	50.0	0.6 %
Q2 26	10,317.00	42.0	0.4 %
Q3 26	10,292.00	50.0	0.5 %
Cal 26	9,752.25	52.25	0.5 %
Cal 27	10,100.00	50.0	0.5 %
Cal 28	-	-	-



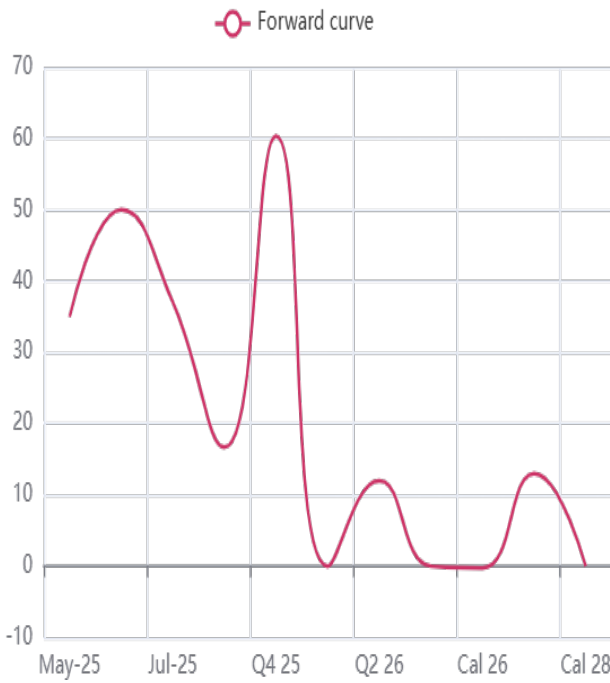
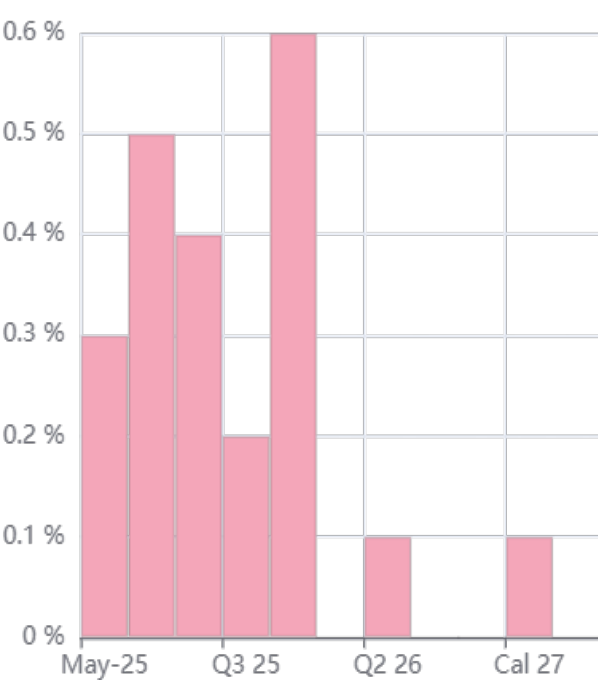
超大灵便型散货船Supramax

10TC	\$/day	WoW	
May-25	10,231.90	-22.1	-0.2 %
Jun-25	9,750.00	46.0	0.5 %
Jul-25	9,967.00	-12.0	-0.1 %
Q3 25	10,286.00	36.0	0.4 %
Q4 25	10,297.33	89.33	0.9 %
Q1 26	8,675.00	0.0	0.0 %
Q2 26	10,575.00	0.0	0.0 %
Q3 26	10,608.00	8.0	0.1 %
10,045.75	Cal 26	6.25	0.1 %
Cal 27	10,521.00	-4.0	0.0 %
Cal 28	10,825.00	-4.0	0.0 %



灵便型散货船Handysize

7TC	\$/day	WoW	
May-25	10,198.00	35.0	0.3 %
Jun-25	10,350.00	50.0	0.5 %
Jul-25	10,250.00	37.0	0.4 %
Q3 25	10,321.00	16.67	0.2 %
Q4 25	10,279.33	60.33	0.6 %
Q1 26	8,638.00	0.0	0.0 %
Q2 26	10,625.00	12.0	12.0
Q3 26	10,575.00	0.0	0.0 %
Cal 26	10,015.75	-0.25	0.0 %
Cal 27	10,238.00	13.0	0.1 %
Cal 28	10,388.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	524.0	459.5	636.0	64.5	2.5	4.03	41.76
Singapore	513.0	449.5	605.0	63.5	-12.5	-16.45	-6.62
Rotterdam	476.0	429.0	614.5	47.0	-2.0	-4.08	17.5
Fujairah	466.5	403.5	609.5	63.0	-5.5	-8.03	18.87
Houston	505.5	422.0	708.0	83.5	-1.5	-1.76	22.79

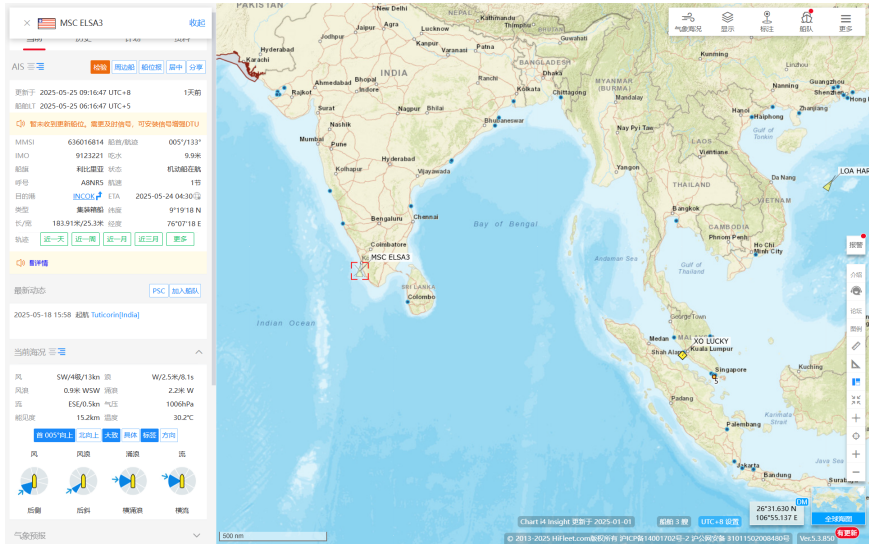
(MP-Bunkering Main Ports; LO-Heavy Low Sulphur Fuel Oil; HO-Heavy Hight Sulphur Fuel Oil; MO-MGO; SP-Spread;)



第七部分 最新商品价格 LATEST COMMODITIES PRICE

Grains and Oilseeds	Index		+/-	Weekly	Monthly	YTD
Wheat	202.0		5.0	2.54	2.02	-11.79
Maize	231.0		6.0	2.67	-2.53	9.48
Soybeans	206.0		3.0	1.48	0.49	-13.08
Rice	174.0		-1.0	-0.57	-1.14	-32.3
Barley	231.0		5.0	2.21	-0.43	-0.43
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	61.31	-0.95	-1.53	5.18	-21.37
Brent	USD/Bbl	64.55	-1.09	-1.66	5.32	-21.58
Natural Gas	USD/MMBtu	3.26	0.11	3.49	-10.19	28.85
Gasoline	USD/Gal	2.11	-0.03	-1.4	4.46	-15.26
Heating Oil	USD/Gal	2.09	-0.05	-2.34	5.03	-13.64
Ethanol	USD/Gal	1.8	0.06	3.45	1.12	0.0
Naphtha	USD/T	546.22	-4.46	-0.81	1.85	-17.46
Propane	USD/Gal	0.75	-0.01	-1.32	1.35	5.63
Uranium	USD/Lbs	71.55	0.25	0.35	2.51	-21.93
Methanol	CNY/T	2241.0	-59.0	-2.57	-3.03	-15.24
TTF Gas	EUR/MWh	36.79	1.07	3.0	12.78	6.24
UK Gas	GBp/thm	87.76	2.49	2.92	11.48	7.26
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.73	0.16	3.5	1.72	-0.84
Coal	USD/T	100.4	1.15	1.16	2.45	-29.94
Steel	CNY/T	3033.0	-55.0	-1.78	-0.62	-15.16
Iron Ore	USD/T	99.81	-0.19	-0.19	1.65	-15.17
Aluminum	USD/T	2452.05	0.0	0.0	0.48	-7.89
Lithium	CNY/T	62000.0	-1250.0	-1.98	-8.76	-41.23
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	3306.39	86.3	2.68	2.07	41.38
Silver	USD/t.oz	33.06	0.79	2.45	3.28	7.34
Platium	null	1077.5	71.6	7.12	12.3	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.13		0.0	0.0	0.0	3.67
USD/CNY	7.19		-0.03	-0.42	-0.28	-0.69

第八部分 本周话题 WEEKLY TOPIC



地中海航运一艘载有危险货的集装箱船在印度附近沉没

据hiFleet航运大数据显示，这艘1728箱位的集装箱船MSC ELSA 3号（1997年波兰建造，悬挂利比里亚国旗）于5月23号北京时间夜间从VIZHINJAM POINT附近港口出发前往COCHIN，海上航行了接近300海里，平均速度只有3.88节。北京时间5月24号下午三点该船在接近目的港前开始停航和漂航，其AIS数据在北京时间5月25号5点消失在hiFleet平台数据上。

据官方信息披露，这艘1728 箱位集装箱船于2025年5月25日凌晨在距离喀拉拉邦港口城市高知38海里（70公里）的地方沉没，当时船上载有13个危险货柜，还有12个集装箱装有电石。

印度当局正处于高度戒备状态，以应对该沉船事件对该国东南端造成的任何环境影响。同时相关当局密切监控喀拉拉邦的海岸线，以控制可能造成的环境破坏。

印度海岸警卫队发布了相关视频和照片显示，这艘老旧的集装箱船在沉没前已经倾斜了26度，船上的24名船员已经释放了救生筏。在该船沉没之前，所有人员都安全获救。据相关部门初步调查，在最初疏散了船上的21名船员后，船长、轮机长和二把手仍留在船上协助计划中的救助行动，5月25日凌晨，其中一个货舱进水，导致MSC Elsa 3号迅速倾覆，这三名船员随后弃船，被附近的印度海军巡逻舰Sujata救起。

据说MSC Elsa 3号船上当时一共有640个集装箱，船上存有84吨柴油和367吨燃料油。截至2025年5月26日早些时候，MSC还没有就这一事件发出任何通报。印度当局也还没有给出这艘船沉没的原因。

据市场信息，这艘船刚刚从英国理赔协会（UK P&I Club）转投轮船互助保险公司（Steamship Mutual）。历史记录显示该船在2016年发生过碰撞，当时船体和机械严重受损。据HIFLEET航运大数据显示该船上一次在印度MONGALORE进行PSC检查的时间是2024年11月19号，有5个小缺陷，东京备忘录该船的安全评级是标准船。

船舶一旦发生碰撞或油污，或人员伤亡，直接会导致船舶停止生产运营，这极大的影响了船东的声誉和经营生产。

According to the shipping big data of hiFleet, the 1,728-TEU container ship MSC ELSA 3 (built in Poland in 1997 and flying the flag of Liberia) set off from the port near VIZHINJAM POINT at night Beijing time on May 23rd and headed for COCHIN. It sailed nearly 300 nautical miles at sea. The average speed is only 3.88 knots. At 3 p.m. Beijing time on May 24th, the vessel began to stop sailing and drift before approaching the destination port. Its AIS data disappeared from the hiFleet platform data at 5 p.m. Beijing time on May 25th.

According to official information disclosure, the 1,728-TEU container ship sank in the early morning of May 25, 2025, 38 nautical miles (70 kilometers) away from the port city of Kochi in Kerala. At that time, the ship was carrying 13 dangerous containers and 12 containers containing calcium carbide.

The Indian authorities are on high alert to deal with any environmental impact of the shipwreck incident on the southeastern tip of the country. Meanwhile, the relevant authorities closely monitor the coastline of Kerala to control the possible environmental damage.

The Indian Coast Guard released relevant videos and photos showing that the old container ship had tilted by 26 degrees before sinking, and the 24 crew members on board had released the life raft. All the personnel were safely rescued before the ship sank. According to the initial investigation by the relevant departments, after the 21 crew members on the ship were initially evacuated, the captain, chief engineer and second-in-command remained on the ship to assist in the planned rescue operation. In the early morning of May 25th, water entered one of the cargo holds, causing MSC Elsa 3 to capsize rapidly. These three crew members subsequently abandoned the ship and were rescued by the nearby Indian Navy patrol ship Sujata.

It is said that there were a total of 640 containers on Ship MSC Elsa 3 at that time, and there were 84 tons of diesel and 367 tons of fuel oil on board. As of early May 26, 2025, MSC had not issued any notification regarding this incident. The Indian authorities have not yet given the reason for the sinking of this ship either.

According to market information, this ship has just been transferred from the UK P&I Club to Steamship Mutual. Historical records show that the ship had a collision in 2016, when the hull and machinery were severely damaged. According to HIFLEET's shipping big data, the last time the vessel underwent a PSC inspection in MONGALORE, India was on November 19, 2024. There were five minor defects, and the safety rating of the vessel in the Tokyo Memorandum was standard vessel.

Once a ship is involved in a collision, oil contamination or casualties, it will directly lead to the suspension of production and operation of the ship, which greatly affects the reputation and business production of the shipowner.

9-1-0