



2025年 第27周市场周报

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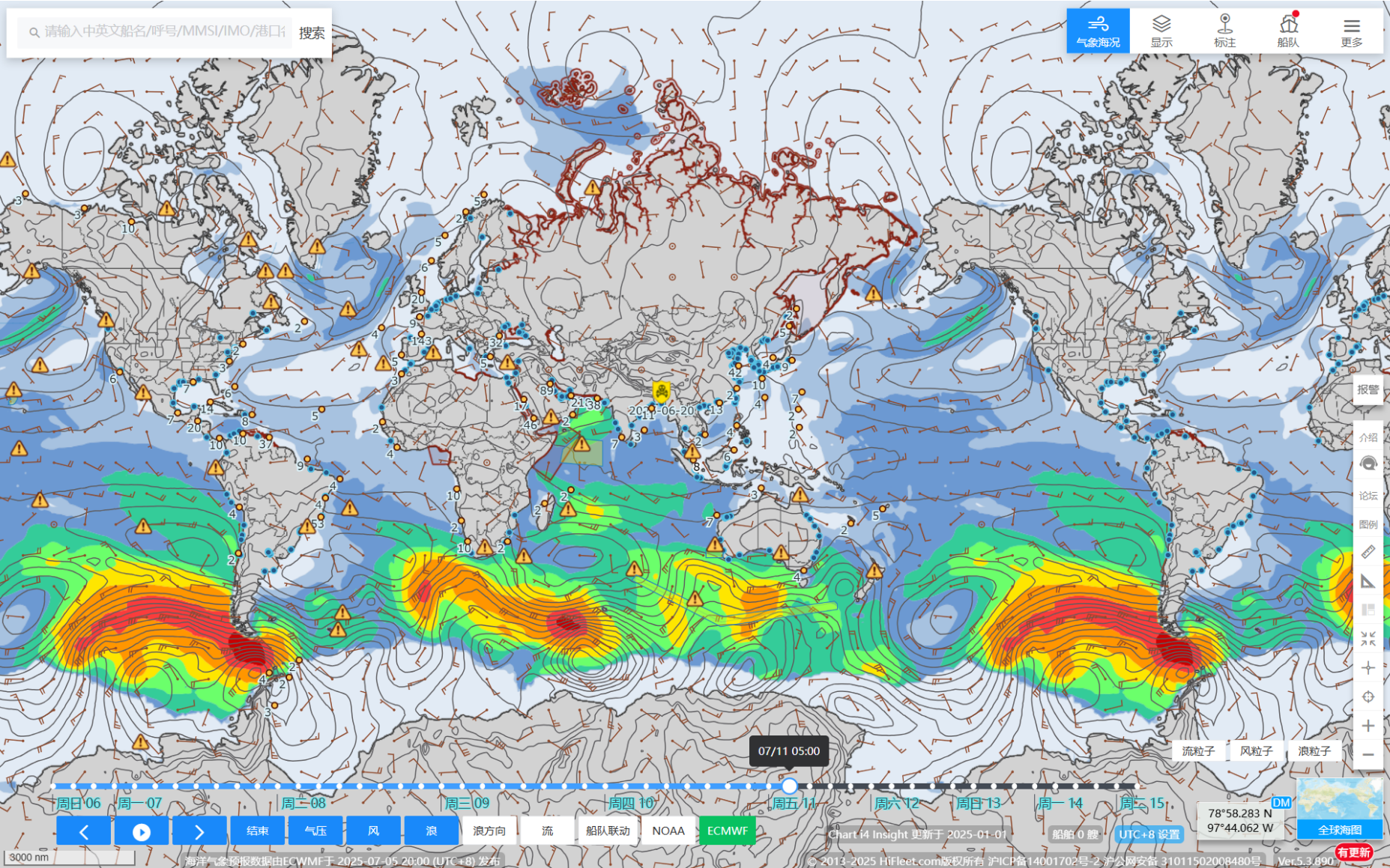
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本周话题 WEEKLY TOPIC

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433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 433 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4-5级，有中浪；东海风力3-5级，后半周有大浪；台湾海峡3-7级风，有大浪；南海大部海域风力3-5级，中浪。太平洋北部和北大西洋的气旋开始变得频繁。The coming week the wind in Bohai Sea is breeze with slight sea. Wind in Yellow Sea is moderate with moderate sea. And China East Sea becomes breeze with rough sea occasionally. The wind in the Taiwan Strait becomes strong with rough sea. In most of the South China Sea the wind will be moderate with moderate sea. The cyclone low activities become frequent in North of Pacific and Atlantic.

海盗事件 Piracy

7月3日，新加坡海峡，一艘正在航行的油轮上，值班船员在例行巡查时发现船尾附近有六名未经授权的人员。警报拉响，随后全船警报响起。听到警报声后，这些人逃走，未偷走任何东西。该事件已向新加坡当局报告，全体船员均报告安全。03.07.2025: 1935 UTC: Posn: 01:06.56N – 103:44.57E, Singapore Straits. The duty crew on routine rounds, onboard a tanker underway, spotted six unauthorised persons near the stern. Alarm raised, resulting in the General alarm sounded. Upon hearing the alarm, the persons escaped without stealing anything. The incident was reported to Singapore Authorities. All crew are reported safe.

海上事件 Marine Incidents

7月3日凌晨，一艘渡轮在印度尼西亚巴厘岛附近沉没，目前已有至少 39 人失踪。当地有关部门在当地时间中午时表示，一艘名为“图努·普拉塔马·贾亚”号的货轮（载重 790 吨，于 2010 年建造）在离开东爪哇省凯塔潘港后不久，在汹涌的海浪中沉没，造成 4 人死亡。On the early morning of July 3rd, a ferry sank near Bali Island in Indonesia. At least 39 people are currently missing. Local authorities said at noon local time that a cargo ship named "Tunu Pratama Jaya" (weighing 790 tons and built in 2010) sank in the rough waves shortly after leaving the Kepanah Port in East Java Province, resulting in 4 deaths.

其它 Others

没有 Nil

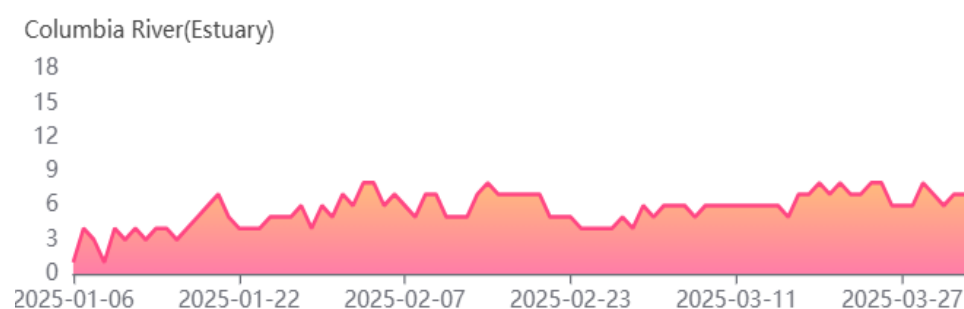
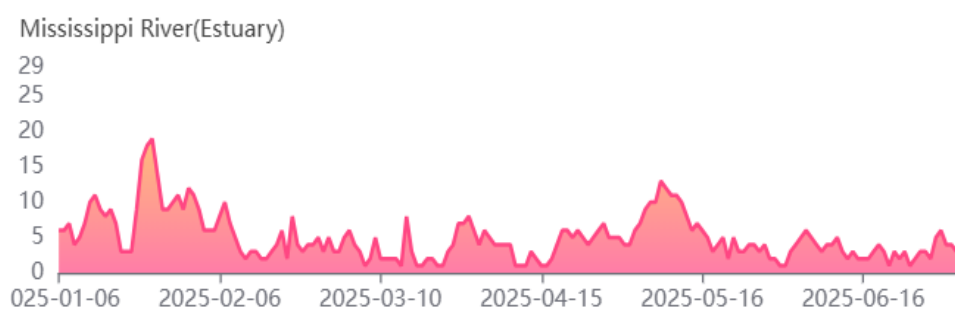
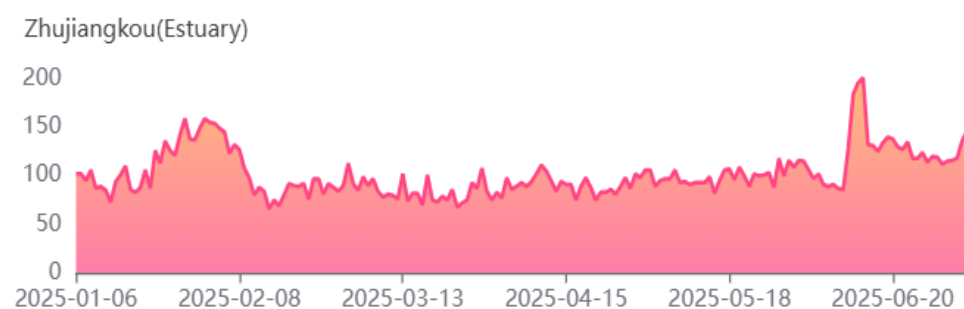
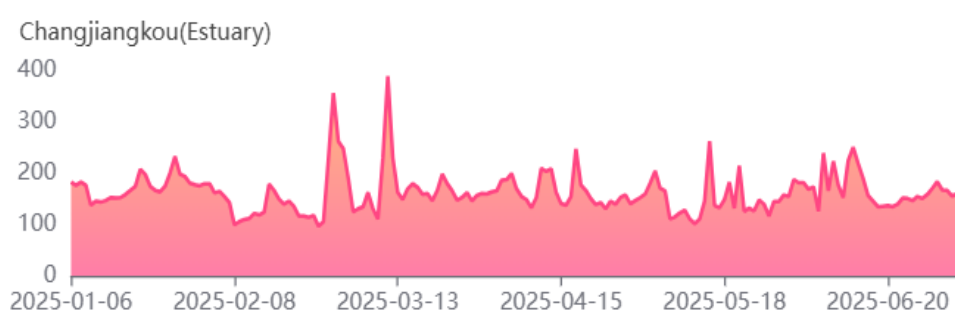
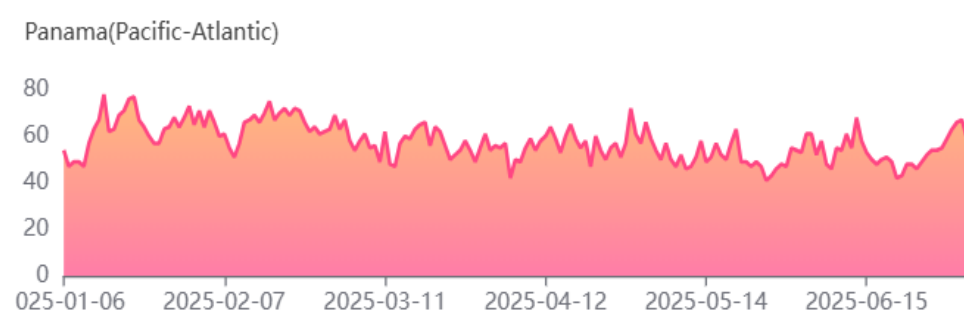
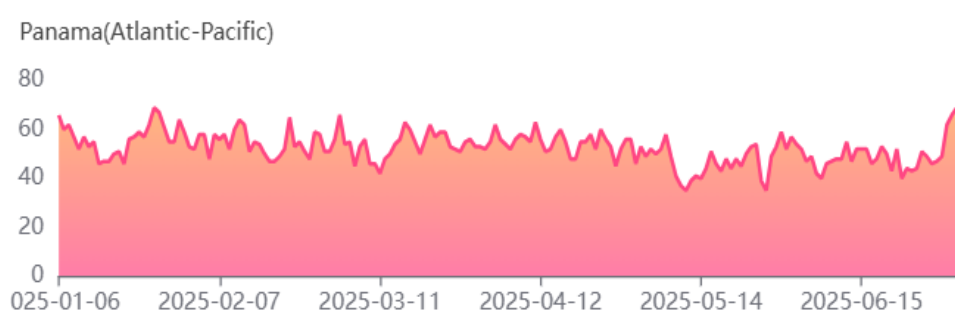
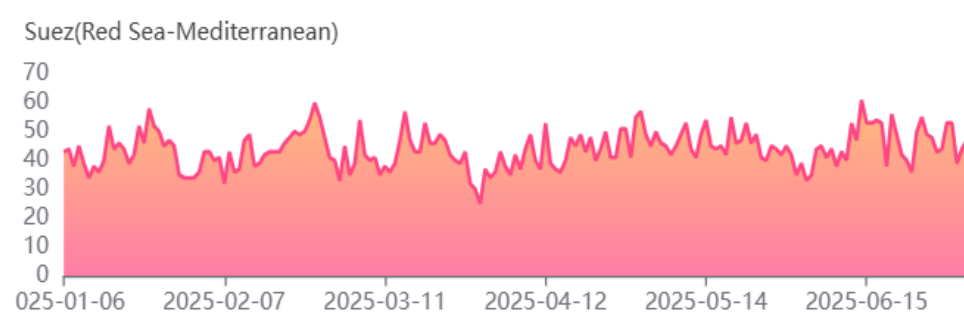
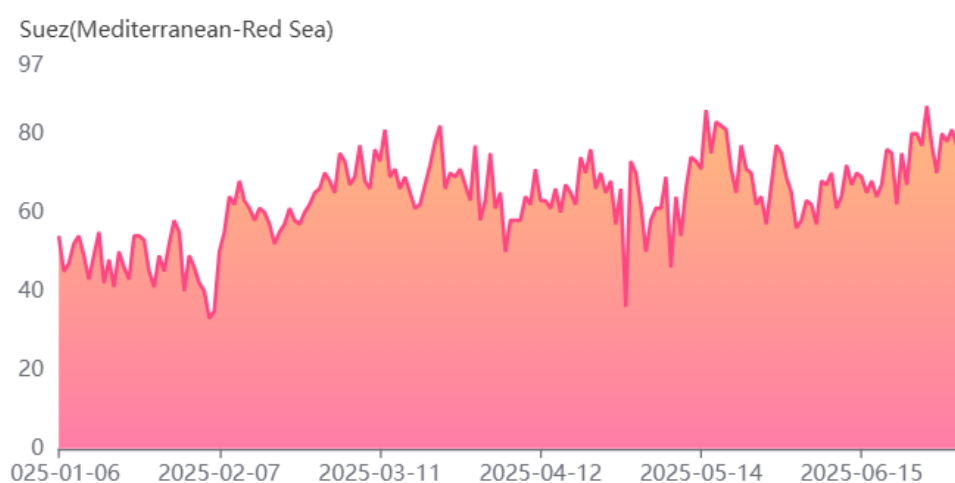
备注 Remark

本报告数据截止时间为2025年7月6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 Jul 06th of 2025; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	40	1365	0	90
Miss.Riv.	4	89	12	-40
CJK	155	4811	77	308
Pa.Atlan.	74	1493	114	138
Colum.Riv.	5	128	-7	20
Suez.Med.	81	2113	25	101
Pa.Pac.	61	1564	90	75
ZJK	101	3722	-12	816

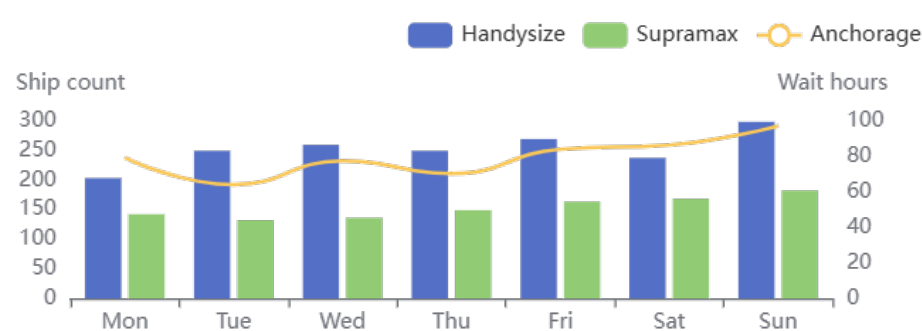


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

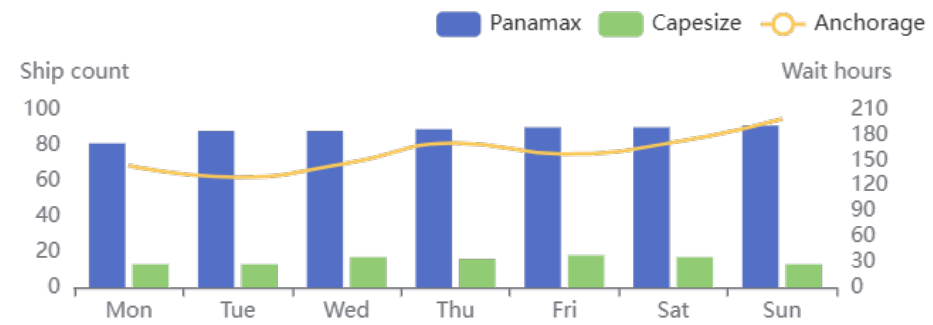
Type	M	T	W	Th	F	Sat	Sun
HDY	203	249	259	249	269	237	298
SMX	142	132	136	149	163	168	182
WT.h.	79.2	64	77.4	70.2	83.9	86.3	97



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

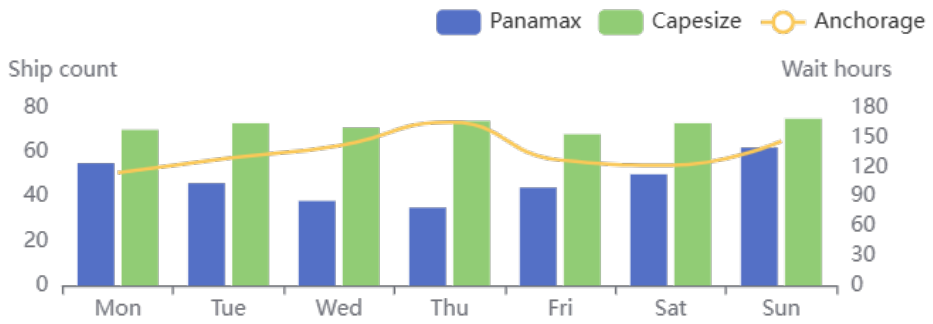
Type	M	T	W	Th	F	Sat	Sun
Pan.	81	88	88	89	90	90	91
Cap	13	13	17	16	18	17	13
WT.h.	143.9	130.3	146.6	170.6	157.7	171.2	199



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

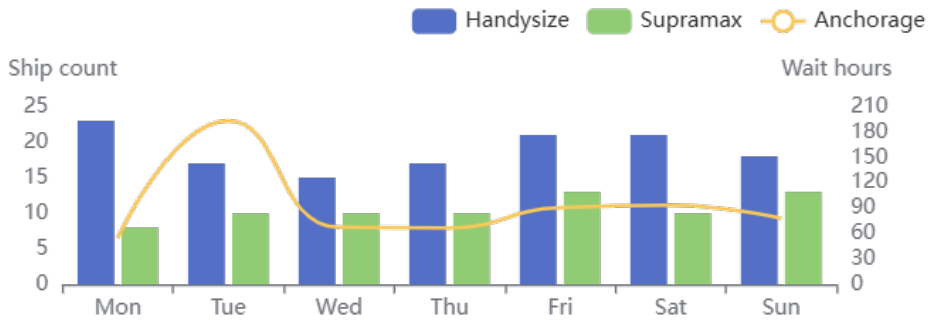
Type	M	T	W	Th	F	Sat	Sun
Pan.	55	46	38	35	44	50	62
Cap	70	73	71	74	68	73	75
WT.h.	114.2	128.9	141.4	165.4	126.9	121.7	146



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

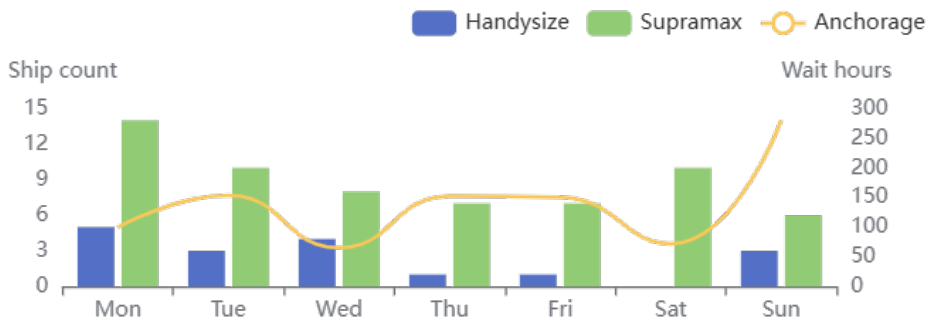
Type	M	T	W	Th	F	Sat	Sun
HDY	23	17	15	17	21	21	18
SMX	8	10	10	10	13	10	13
WT.h.	55.2	193.3	67.5	66.9	90.9	93.5	78



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

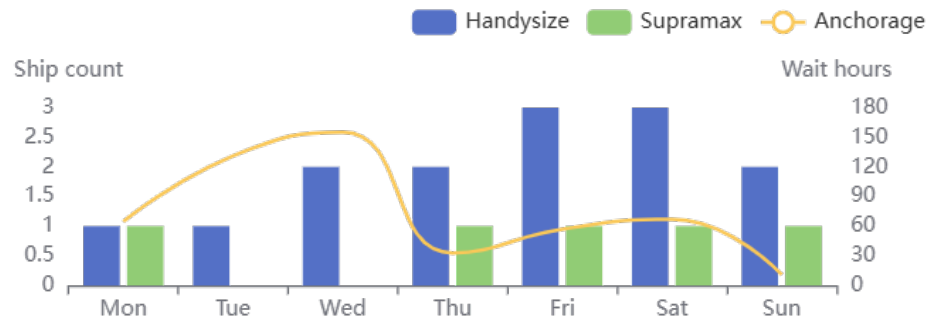
Type	M	T	W	Th	F	Sat	Sun
HDY	5	3	4	1	1	0	3
SMX	14	10	8	7	7	10	6
WT.h.	99.6	153.8	65.25	152.35	150.5	71.75	280



最近一周拉普拉特河区域超大型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Supra and Handy Num. and Waiting Time Information in Anchorages of Plate River

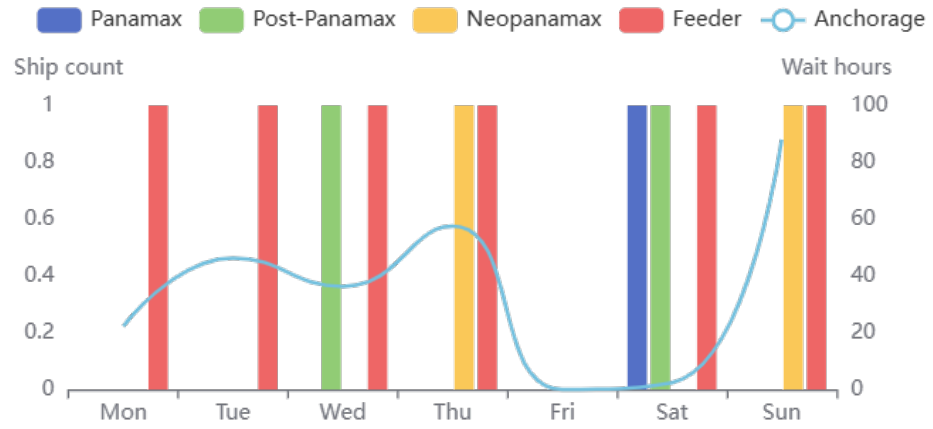
Type	M	T	W	Th	F	Sat	Sun
HDY	1	1	2	2	3	3	2
SMX	1	0	0	1	1	1	1
WT.h.	64.7	131.2	155.2	32.9	56.9	67.1	11



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

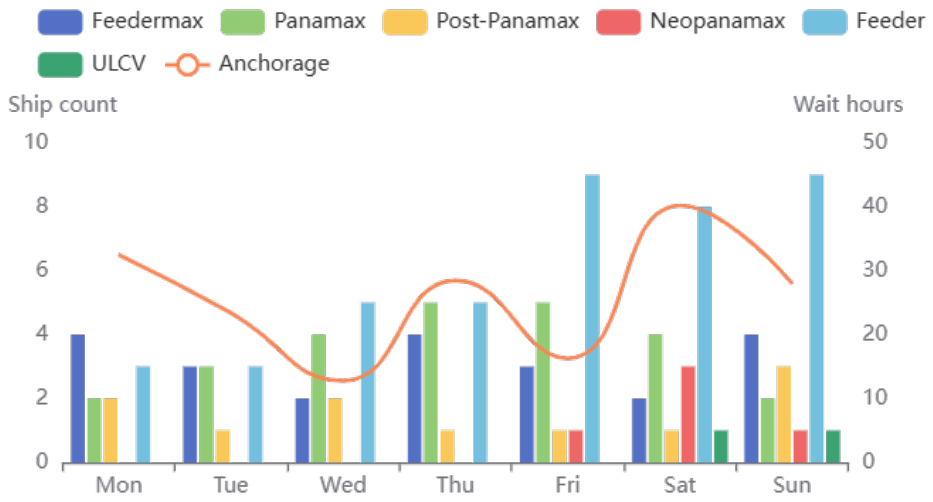
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	0	0
Pan.	0	0	0	0	0	1	0
PPx	0	0	1	0	0	1	0
NPx	0	0	0	1	0	0	1
Fd	1	1	1	1	0	1	1
WT.h.	22.3	46.3	36.3	57.55	0.0	2.4	88
Ulcw	0	0	0	0	0	0	0



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

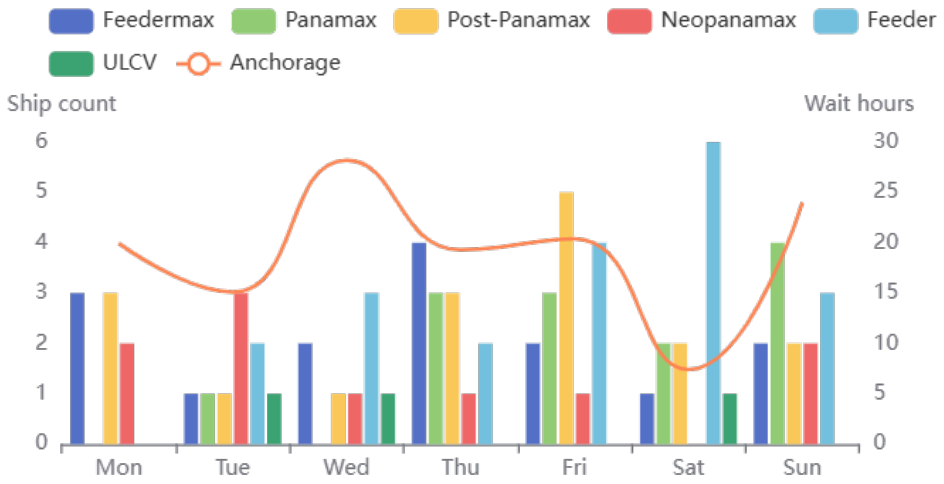
Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	3	2	4	3	2	4
Pan.	2	3	4	5	5	4	2
PPx	2	1	2	1	1	1	3
NPx	0	0	0	0	1	3	1
Fd	3	3	5	5	9	8	9
Ulcw	0	0	0	0	0	1	1
WT.h.	32.5	23.4	12.8	28.5	16.3	40.2	28



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

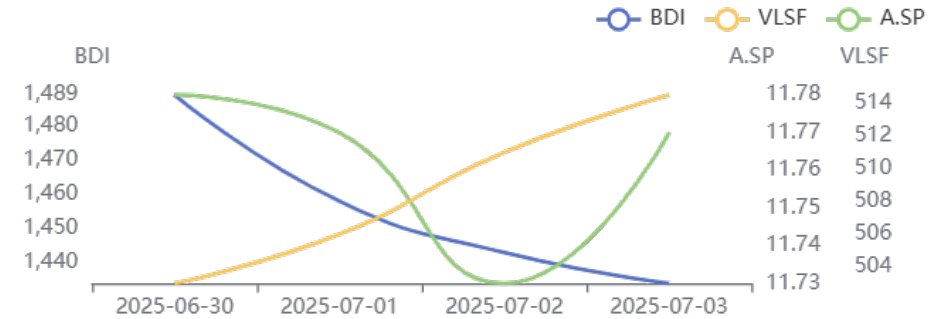
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	1	2	4	2	1	2
Pan.	0	1	0	3	3	2	4
PPx	3	1	1	3	5	2	2
NPx	2	3	1	1	1	0	2
Fd	0	2	3	2	4	6	3
Ulcw	0	1	1	0	0	1	0
WT.h.	19.95	15.1	28.2	19.3	20.4	7.4	24



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

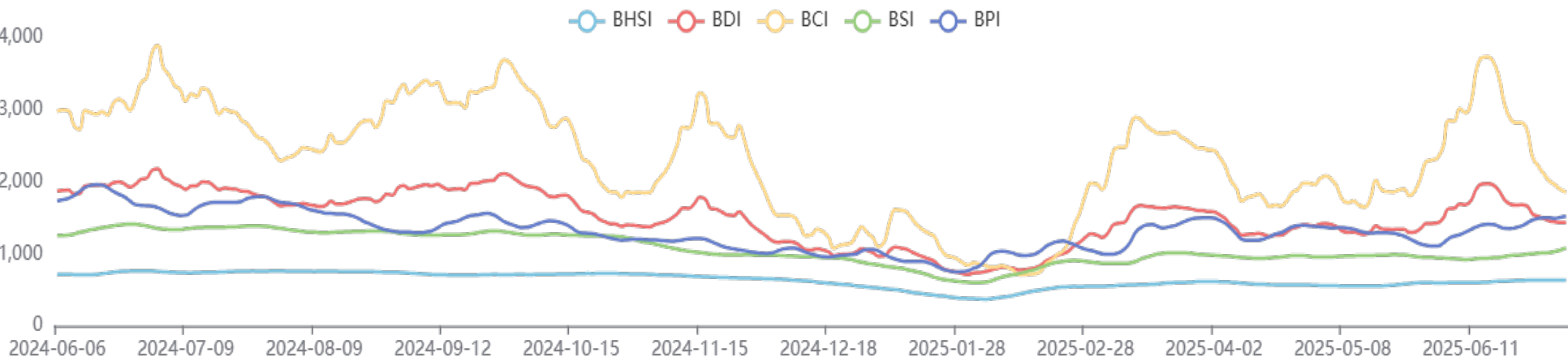
Type	M	T	W	Th	F	Sat	Sun
BDI	1500	1500	1492	1507			
VLSF	503.00	506.00	511.00	514.50			
A.SP	11.78	11.77	11.73	11.77	11.75	11.78	



第三部分 航运市场 SHIPPING MARKET

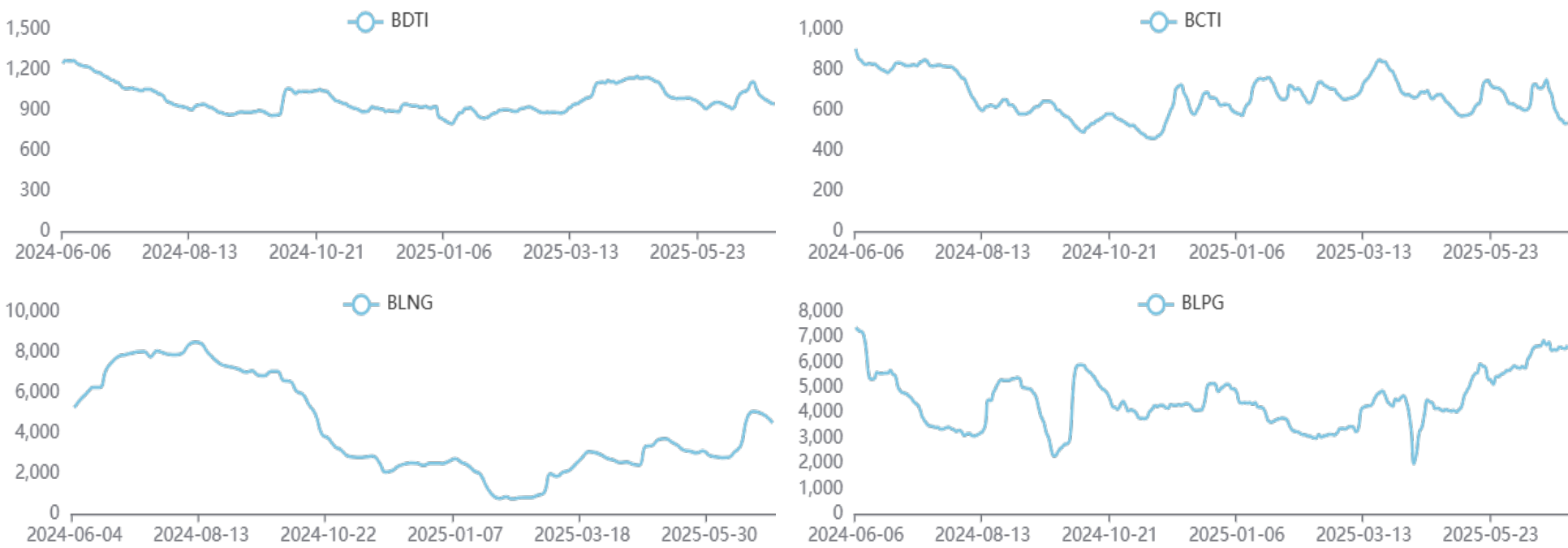
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1436	-85.0	-5.59	-12.06	-28.95
BCI	1855	-365.0	-16.44	-34.73	-46.79
BPI	1520	30.0	2.01	21.99	-3.06
BSI	1081	72.0	7.14	15.86	-19.15
BHSI	633	-3.0	-0.47	5.5	-15.03



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	945	-57.0	-5.69	-0.63	-14.71
BCTI	535	-78.0	-12.72	-14.54	-34.68
BLNG	4510	-483.0	-9.67	62.41	-43.3
BLPG	6674	176.0	2.71	14.03	42.76



第四部分 运力分布 SUPPLY DISTRIBUTION

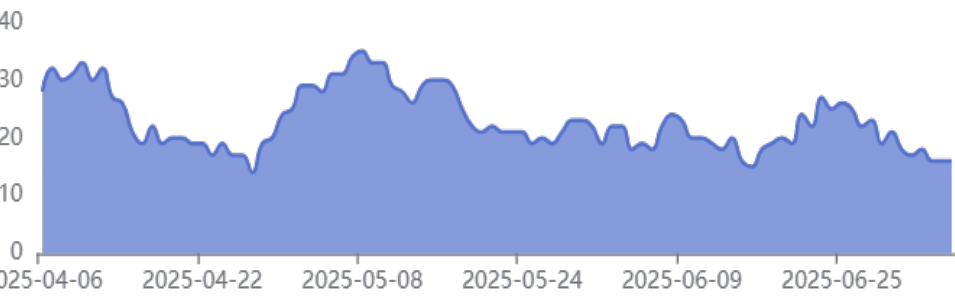


好望角型散货船 Capesize

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.

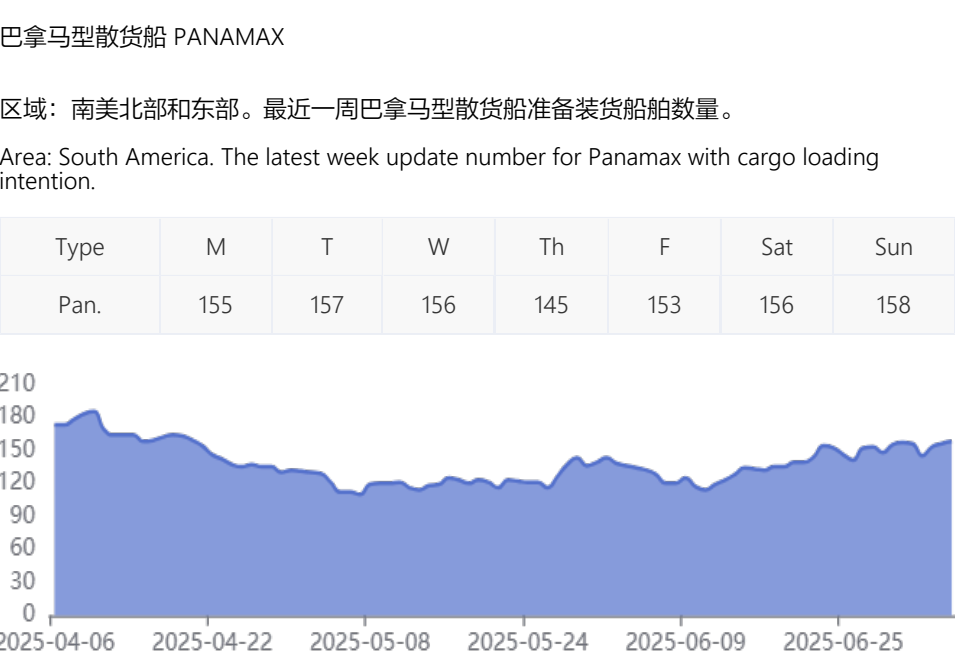
Type	M	T	W	Th	F	Sat	Sun
Cape	21	18	17	18	16	16	16



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.

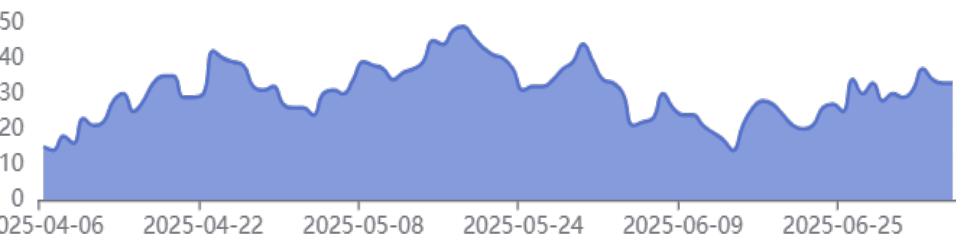
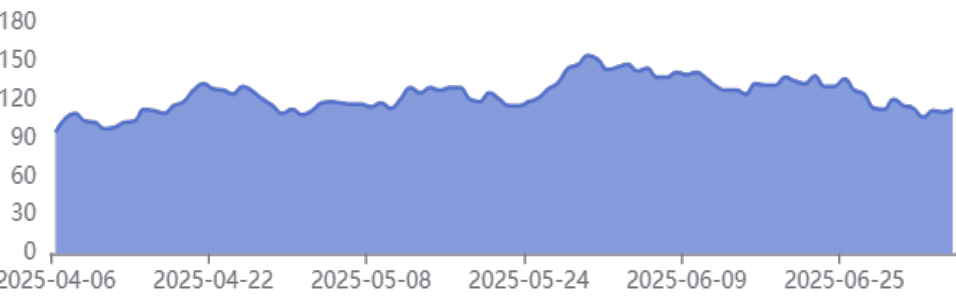
Type	M	T	W	Th	F	Sat	Sun
Cape	30	29	31	37	34	33	33



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	120	115	113	106	111	110	112

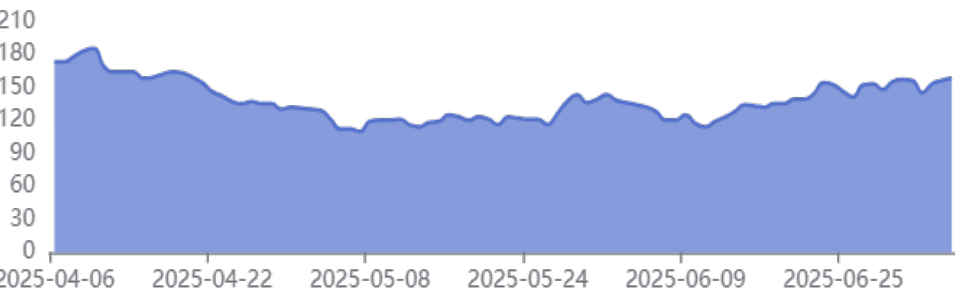


巴拿马型散货船 PANAMAX

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.

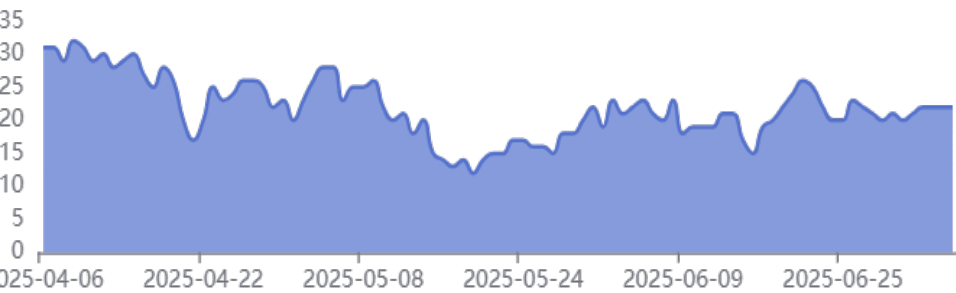
Type	M	T	W	Th	F	Sat	Sun
Pan.	155	157	156	145	153	156	158



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.

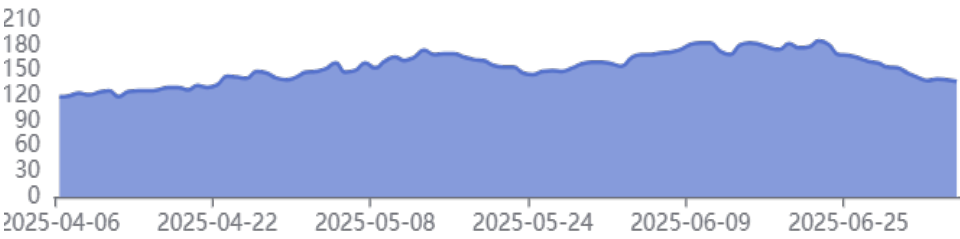
Type	M	T	W	Th	F	Sat	Sun
Pan.	7	7	8	7	7	8	7



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.	153	147	142	138	140	139	137

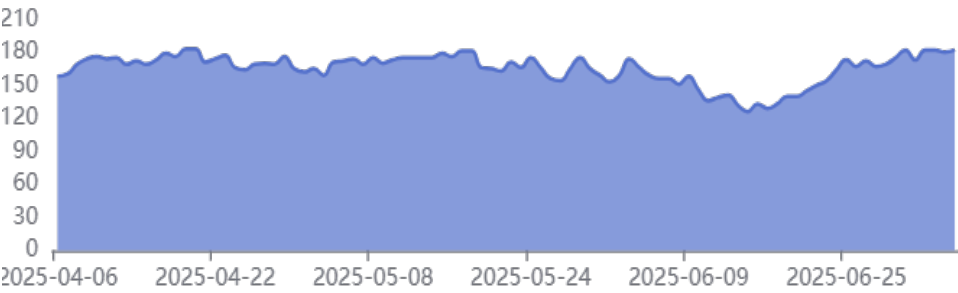


超大灵便型散货 SUPRAMAX

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.

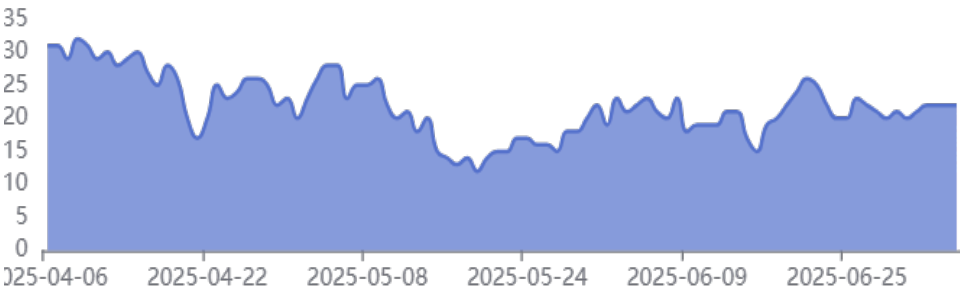
Type	M	T	W	Th	F	Sat	Sun
SMX	175	182	173	182	182	180	182



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.

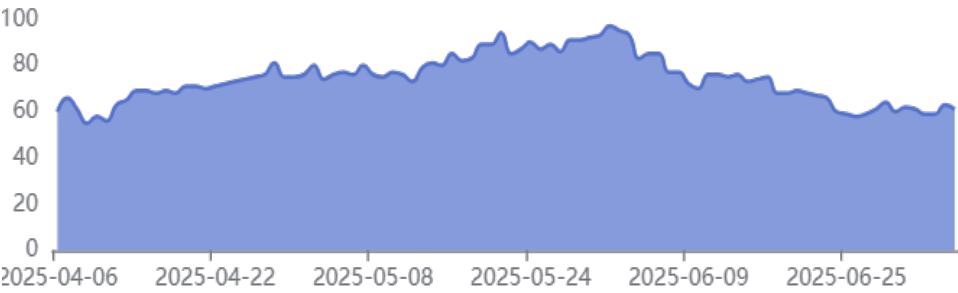
Type	M	T	W	Th	F	Sat	Sun
SMX	21	20	21	22	22	22	22



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.

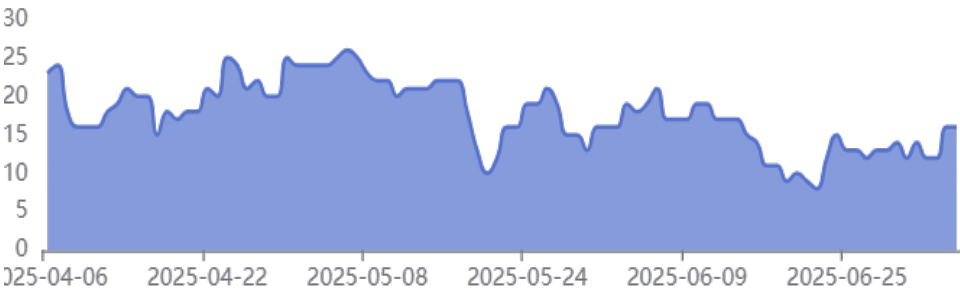
Type	M	T	W	Th	F	Sat	Sun
SMX	14	12	14	12	12	16	16



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.

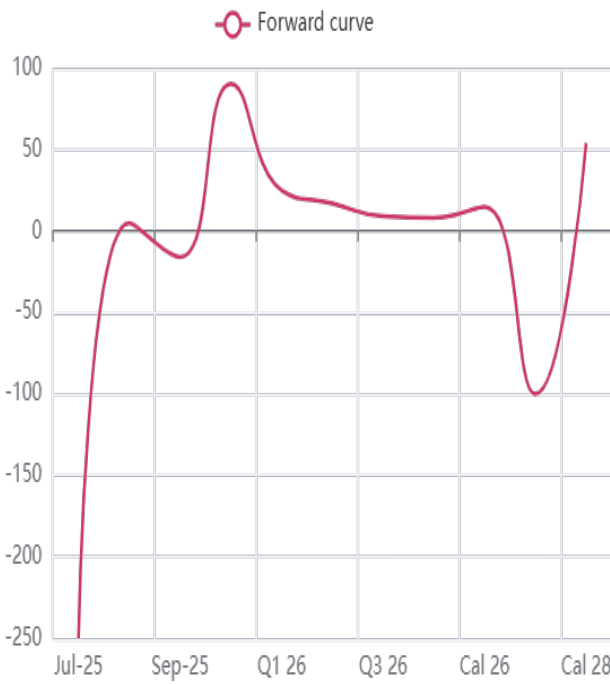
Type	M	T	W	Th	F	Sat	Sun
SMX	60	62	61	59	59	63	61



第五部分 远期运价协议 FFA

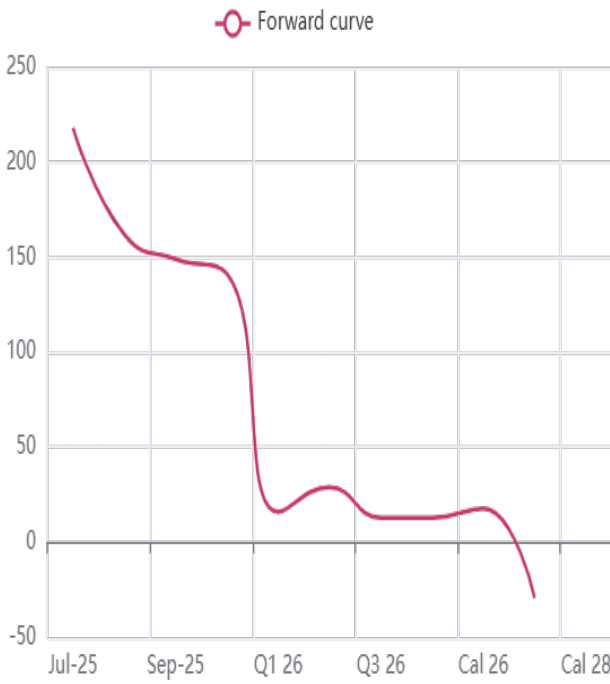
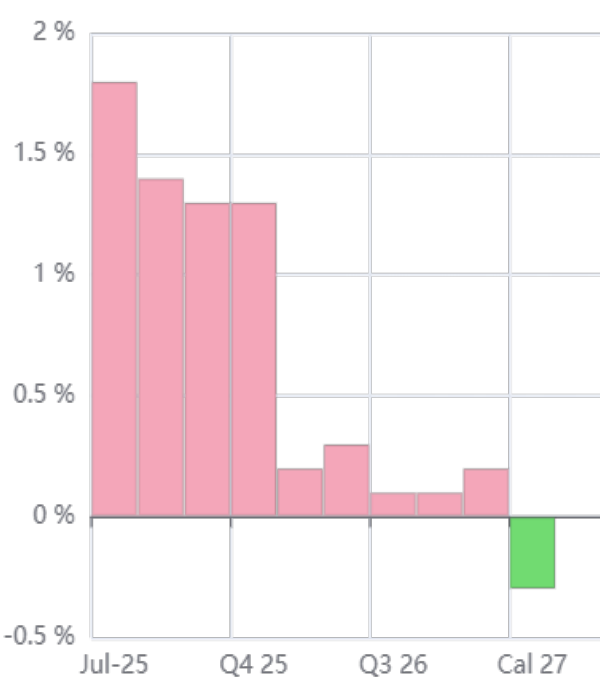
好望角型散货船Capesize

5TC	\$/day	WoW	
Jul-25	16,013.00	-250.0	-1.5 %
Aug-25	17,838.00	5.0	0.0 %
Sep-25	19,888.00	-16.0	-0.1 %
Q4 25	20,212.67	90.33	0.4 %
Q1 26	12,838.00	25.0	0.2 %
Q2 26	17,613.00	17.0	0.1 %
Q3 26	20,813.00	9.0	0.0 %
Q4 26	21,504.00	8.0	0.0 %
Cal 26	18,192.00	14.75	0.1 %
Cal 27	18,817.00	-100.0	-0.5 %
Cal 28	18,667.00	54.0	0.3 %



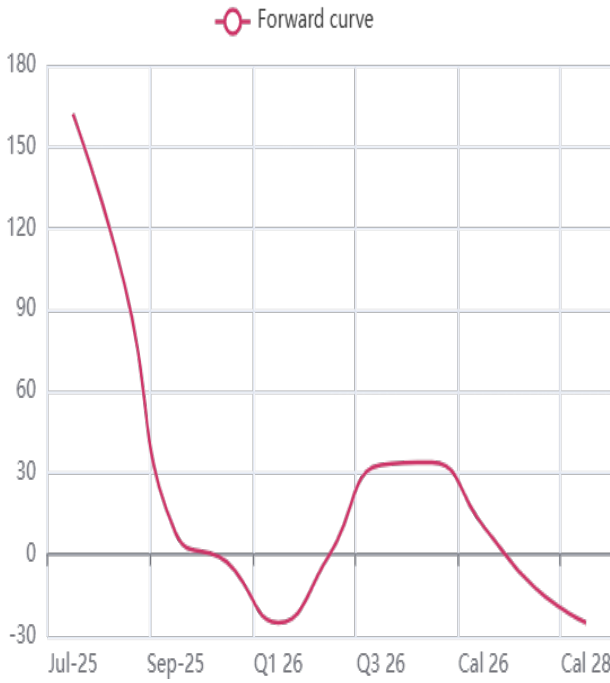
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jul-25	12,478.00	218.0	1.8 %
Aug-25	11,761.00	162.0	1.4 %
Sep-25	11,652.00	149.0	1.3 %
Q4 25	11,034.33	141.33	1.3 %
Q1 26	8,921.00	16.0	0.2 %
Q2 26	10,713.00	29.0	0.3 %
Q3 26	10,559.00	13.0	0.1 %
Q4 26	10,301.00	13.0	0.1 %
Cal 26	10,123.50	17.75	0.2 %
Cal 27	10,138.00	-29.0	-0.3 %
Cal 28	-	-	-



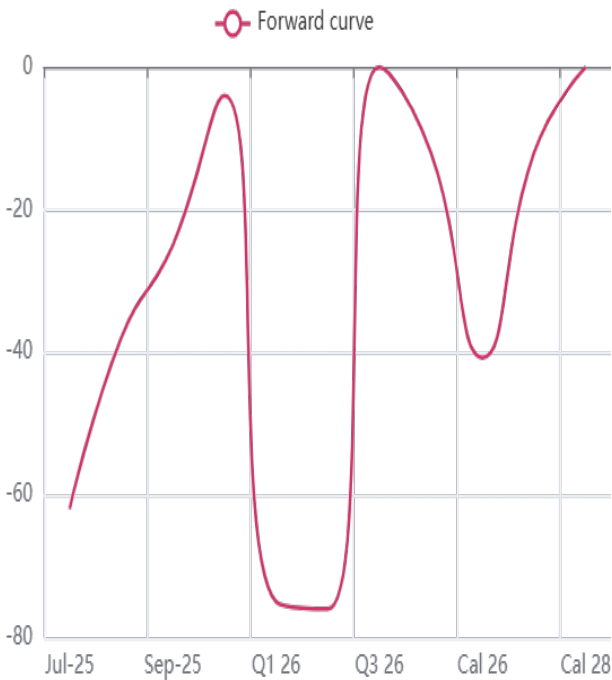
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Jul-25	12,183.00	162.0	1.3 %
Aug-25	12,263.00	100.0	0.8 %
Sep-25	12,279.00	8.0	0.1 %
Q4 25	11,777.67	-2.67	0.0 %
Q1 26	9,308.00	-25.0	-0.3 %
Q2 26	11,158.00	0.0	0.0 %
Q3 26	11,058.00	33.0	0.3 %
Q4 26	10,792.00	34.0	0.3 %
10,579.00	Cal 26	10.5	0.1 %
Cal 27	10,842.00	-12.0	-0.1 %
Cal 28	10,921.00	-25.0	-0.2 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Jul-25	11,788.00	-62.0	-0.5 %
Aug-25	12,050.00	-38.0	-0.3 %
Sep-25	11,875.00	-25.0	-0.2 %
Q4 25	11,596.33	-4.0	0.0 %
Q1 26	9,175.00	-75.0	-0.8 %
Q2 26	11,038.00	-76.0	-0.7 %
Q3 26	11,138.00	0.0	0.0
Q4 26	10,688.00	-12.0	-0.1 %
Cal 26	10,509.75	-40.75	-0.4 %
Cal 27	10,513.00	-12.0	-0.1 %
Cal 28	10,550.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	527.5	449.5	674.5	78.0	5.5	7.59	15.56
Singapore	522.5	429.0	662.0	93.5	10.5	12.65	35.51
Rotterdam	491.5	427.0	674.5	64.5	18.5	40.22	32.99
Fujairah	486.0	434.5	675.0	51.5	-31.0	-37.58	-18.9
Houston	512.0	417.0	727.5	95.0	3.0	3.26	11.11

(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	197.0		-4.0	-1.99	-2.48	-3.43
Maize	217.0		4.0	1.88	-1.81	13.61
Soybeans	206.0		-4.0	-1.9	1.48	-8.04
Rice	170.0		-1.0	-0.58	-2.3	-32.27
Barley	220.0		-1.0	-0.45	-0.9	2.8
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	64.99	-1.24	-1.87	3.7	-20.84
Brent	USD/Bbl	66.61	-2.43	-3.52	2.86	-22.19
Natural Gas	USD/MMBtu	3.4	-0.24	-6.59	-7.86	31.78
Gasoline	USD/Gal	2.07	-0.09	-4.17	0.49	-18.18
Heating Oil	USD/Gal	2.26	-0.02	-0.88	10.24	-11.72
Ethanol	USD/Gal	1.68	0.05	3.07	-4.0	-9.68
Naphtha	USD/T	559.42	-7.53	-1.33	5.33	-15.61
Propane	USD/Gal	0.76	-0.02	-2.56	2.7	0.0
Uranium	USD/Lbs	78.75	1.2	1.55	9.53	-8.16
Methanol	CNY/T	2406.0	-17.0	-0.7	5.9	-4.6
TTF Gas	EUR/MWh	33.43	-3.0	-8.23	-5.67	-4.07
UK Gas	GBP/thm	78.64	-6.47	-7.6	-4.99	-4.82
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	5.1	0.22	4.51	8.05	15.91
Coal	USD/T	109.9	2.65	2.47	4.32	-17.49
Steel	CNY/T	2962.0	11.0	0.37	1.06	-11.58
Iron Ore	USD/T	94.47	-0.28	-0.3	-1.54	-11.3
Aluminum	USD/T	2452.05	0.0	0.0	0.0	-3.37
Lithium	CNY/T	61300.0	1400.0	2.34	1.66	-33.01
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	3345.59	26.09	0.79	-0.45	43.9
Silver	USD/t.oz	36.59	0.53	1.47	6.86	25.31
Platium	null	1349.3	46.5	3.57	28.39	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.18		0.02	1.72	3.51	9.26
USD/CNY	7.16		-0.01	-0.14	-0.42	-1.92

第八部分 本周话题 WEEKLY TOPIC



连续集装箱火灾引发关注

2025年7月4日，万海航运公司在一份声明中称，其 4254 标箱的集装箱船“WAN HAI 503 号”（2005年建造）持续近一个月的大火已逐渐得到控制，但据该班轮公司称，一些货舱内仍有轻度烟雾。还有3055 标箱的“Interasia Tenacity”号（2024 年建造）和 5608 标箱的“WAN HAI 613”号（2001 年建造）也都在印度海岸遭遇过火灾。最近几周这些在印度海岸连续发生几起集装箱船火灾事故，引发印度主管机关的警觉，进一步会促使印度监管机构采取行动。印度呼吁加强对集装箱船的安全监管措施，因为过去几周内其海岸线附近发生了多起集装箱船火灾。

印度官方代表在 6 月 18 日举行的国际海事组织会议上表示，上述火灾中有2起火灾均是由未申报的锂离子电池引起的。在最近的集装箱船火灾事故之前，还发生过 1728 标箱的“MSC Elsa 3 号”（1997 年建造）的救援和紧急应对事件。2025年5 月 25 日，“MSC Elsa 3 号”在科钦港西南 30 海里（56 公里）处严重倾斜后沉没。

2025年6 月 9 日，悬挂新加坡国旗的“WAN HAI 503”号发生舱内爆炸并起火。船上 22 名船员中，18 人获救，4 人失踪。在国际海事组织第 110 届海上安全委员会会议上，印度呼吁对集装箱货物的包装、装载和监测规程进行审查，尤其是锂离子电池和塑料微粒。

印度海岸警卫队的 3178 总吨“Samudra Prahari”号（2010 年建造）和 2764 总吨“Sachet”号（2020 年建造）正在印度沿海燃烧的 4333 标准箱的“万海 503”号（2005 年建造）上灭火。

集装箱航运公司应采用技术并以透明的方式承担责任，以防止此类事件发生。印度代表团在国际海事组织会议上表示：“仅依赖托运人的申报是不够的。”箱子里装的是什么不能再是个谜了。近几周内接连发生的这几起事件要求利益相关方立即采取行动，以保护海员的生命以及印度渔民和沿海社区的生计。

On July 4th, 2025, Wan Hai Lines stated in a statement that the fire on its 4,254 TEU container ship "WAN HAI 503" (built in 2005), which had been burning for nearly a month, was gradually under control. However, according to the liner company, there was still some light smoke in some cargo holds.

The 3,055 TEU "Interasia Tenacity" (built in 2024) and the 5,608 TEU "WAN HAI 613" (built in 2001) also suffered fires off the coast of India. The recent string of container ship fires off the Indian coast has raised the alarm among Indian authorities and is likely to prompt further action by Indian regulators. India has called for enhanced safety regulations for container ships after several such incidents occurred near its coastline in the past few weeks.

The Indian official representative stated at the International Maritime Organization meeting held on June 18 that two of the aforementioned fires were caused by undeclared lithium-ion batteries. Before the recent container ship fire incidents, there was also the rescue and emergency response event involving the 1,728 TEU "MSC Elsa 3" (built in 1997). On May 25, 2025, the "MSC Elsa 3" capsized and sank 30 nautical miles (56 kilometers) southwest of the Port of Kochi.

On June 9, 2025, the "WAN HAI 503" flagged in Singapore experienced an explosion and fire in its hold. Among the 22 crew members on board, 18 were rescued and 4 were missing. At the 110th session of the Maritime Safety Committee of the International Maritime Organization, India called for a review of the packaging, loading and monitoring procedures for containerized cargo, especially lithium-ion batteries and microplastics.

The Indian Coast Guard vessels "Samudra Prahari" (3,178 gross tonnage, built in 2010) and "Sachet" (2,764 gross tonnage, built in 2020) are fighting the fire on the 4,333 TEU "Wan Hai 503" (built in 2005) which is burning off the coast of India.

Container shipping companies should adopt technology and take responsibility in a transparent manner to prevent such incidents from happening. The Indian delegation stated at the International Maritime Organization meeting: "Relying solely on the declarations of shippers is not enough." What is in the boxes can no longer be a mystery. The series of incidents that have occurred in recent weeks call for immediate action by all stakeholders to protect the lives of seafarers and the livelihoods of Indian fishermen and coastal communities.