



2025年 第35周市场周报

Contents

第一部分

航运安全 SHIPPING SAFETY

第二部分

航运数据 SHIPPING DATA

第三部分

航运市场 SHIPPING MARKET

第四部分

运力分布 SUPPLY DISTRIBUTION

第五部分

远期运价协议 FFA

第六部分

燃油价格 BUNKER PRICE

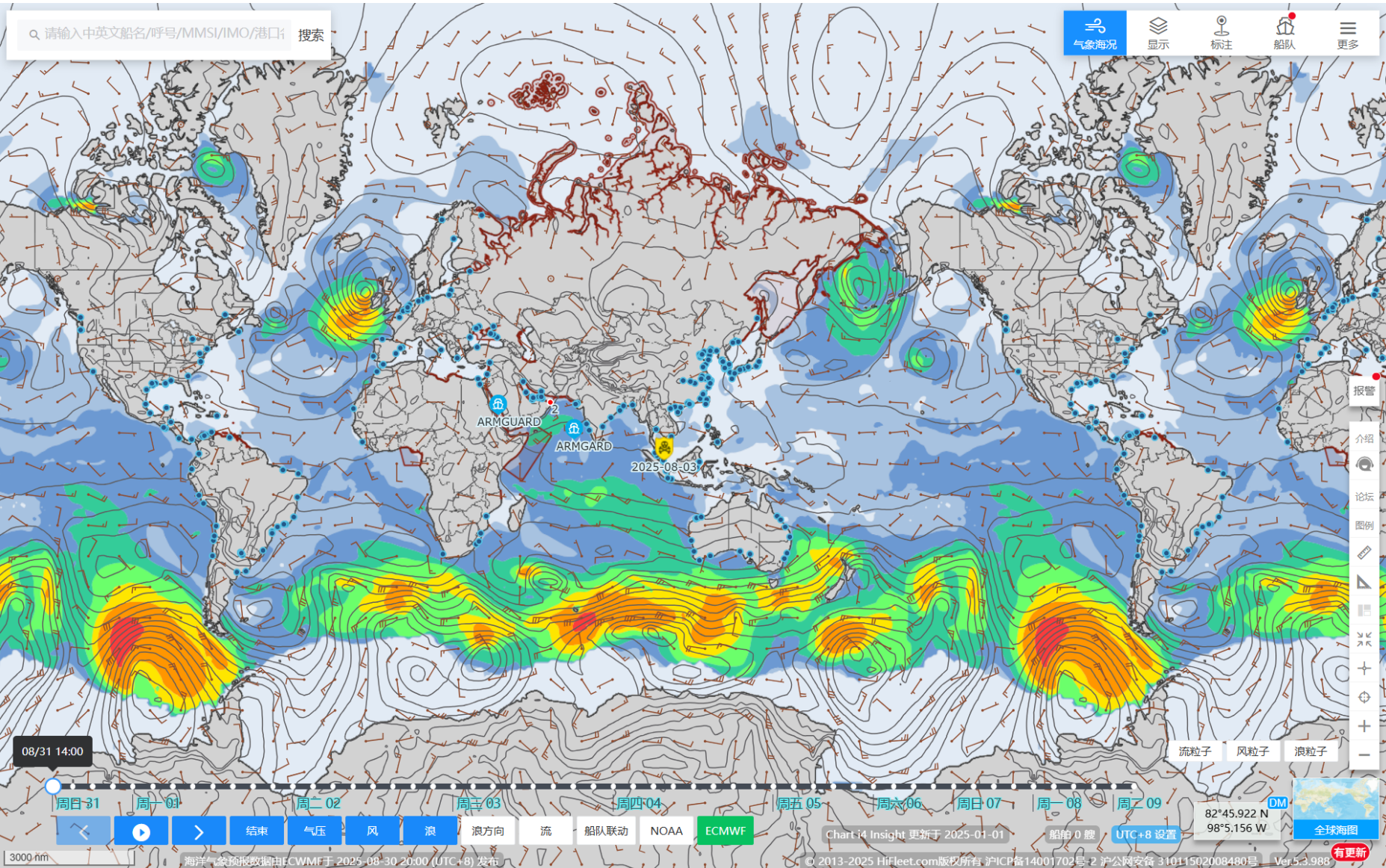
第七部分

最新商品价格 LATEST COMMODITIES PRICE

第八部分

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1601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 1601 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3-5级，有中浪；东海风力4-5级，有中浪；台湾海峡3-4级风，轻浪；南海风力3-4级，有中浪。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 moderate with slight sea. Wind in Yellow Sea is moderate with moderate sea occasionally. And wind in China East Sea is moderate with moderate sea. The wind in the Taiwan Strait is moderate with slight sea. In most of the South China Sea the wind is moderate with moderate sea occasionally. The cyclone low activities become frequent in North of Pacific and Atlantic.

海盗事件 Piracy

最近一周没有最新海盗报告。There was no pirate report for the latest week.

海上事件 Marine Incidents

8月21号，一艘希腊货船在克里特岛附近搁浅近一个月后，部分船体已经沉没入海。希腊海岸警卫队发布的照片显示，悬挂塞拉利昂国旗、载重 5800 吨的“MN COSTAS”号货轮（建于 1994 年）的船尾在基里亚马迪附近沉入水中，仅船头露出水面。该船只于 7 月 24 日在一处已标注的暗礁处搁浅，并开始进水。On August 21st, after being stranded near the island of Crete for nearly a month, part of a Greek cargo ship had already sunk into the sea. The ship ran aground at a marked reef on July 24th and began to take on water.

其它 Others

没有 Nil

备注 Remark

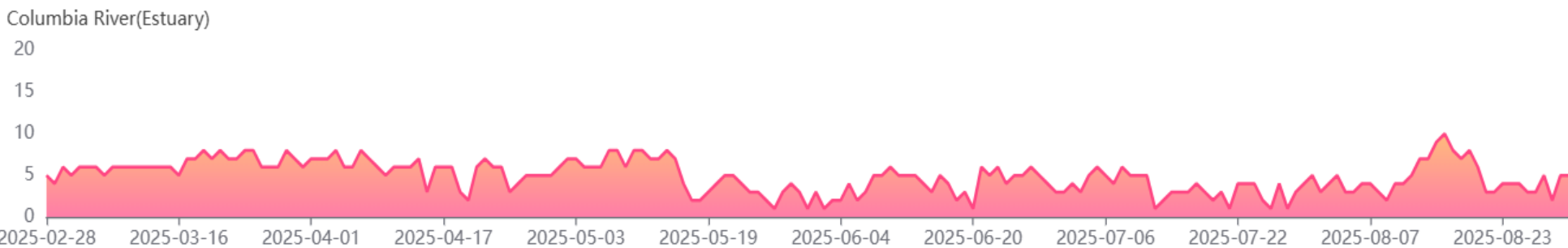
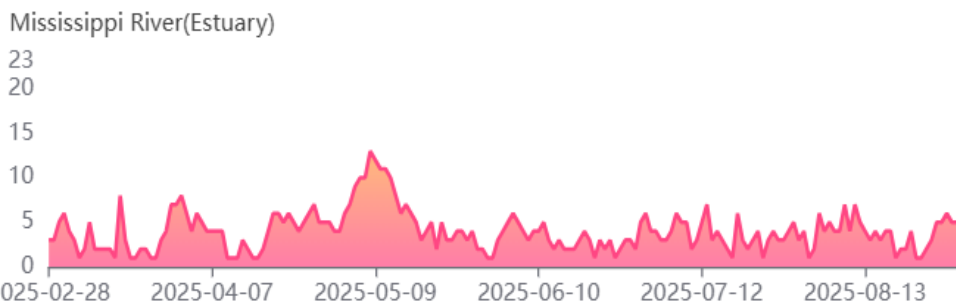
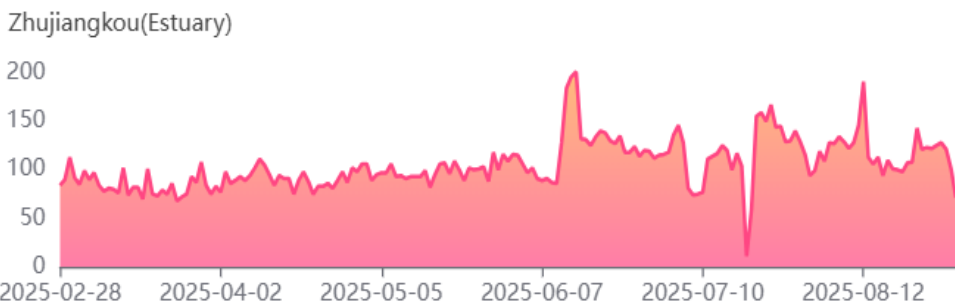
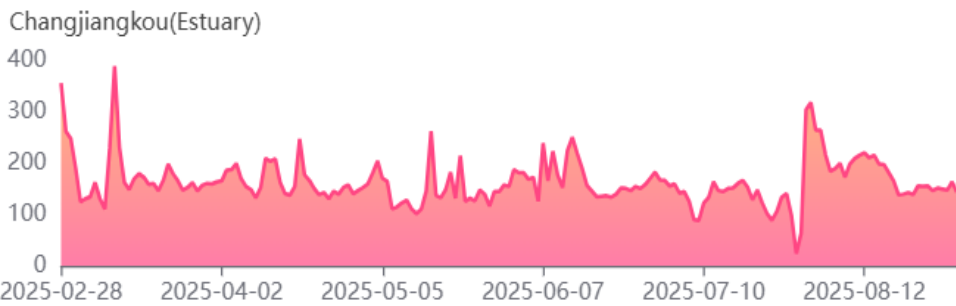
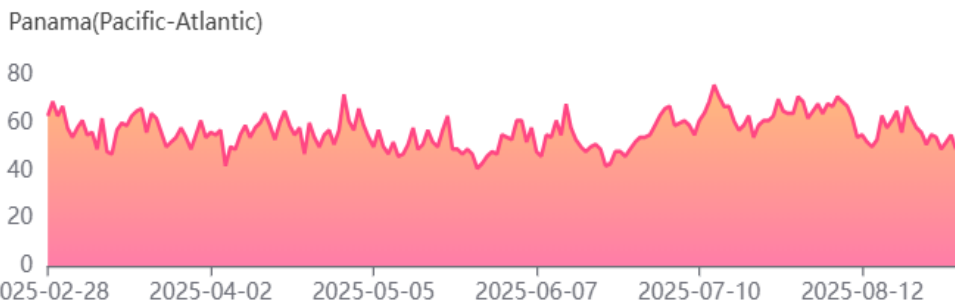
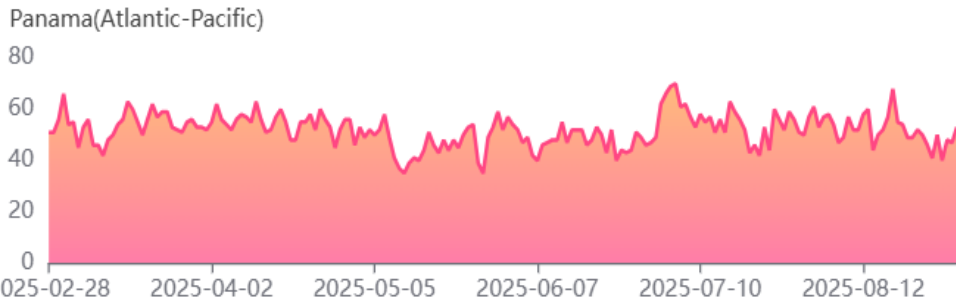
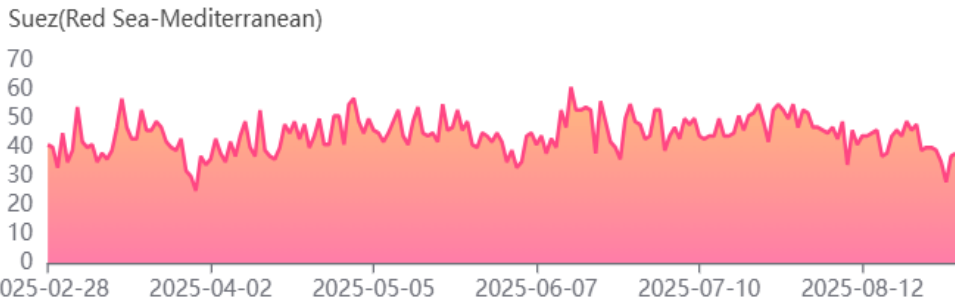
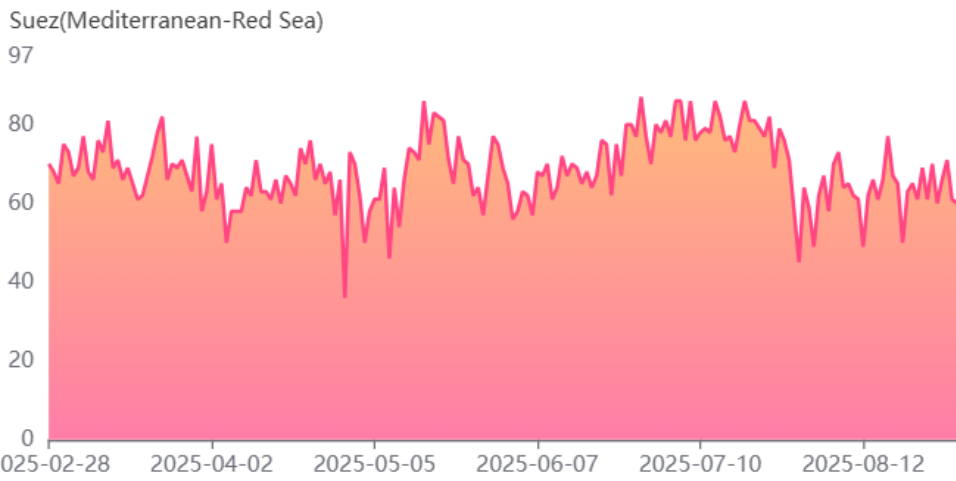
本报告数据截止时间为2025年8月31日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Aug 31st of 2025; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	38	1225	-58	-182
Miss.Riv.	5	112	13	11
CJK	144	5181	-4	920
Pa.Atlan.	53	1502	-59	-72
Colum.Riv.	5	140	-12	41
Suez.Med.	60	1852	1	-299
Pa.Pac.	49	1711	-62	-135
ZJK	71	3438	24	149

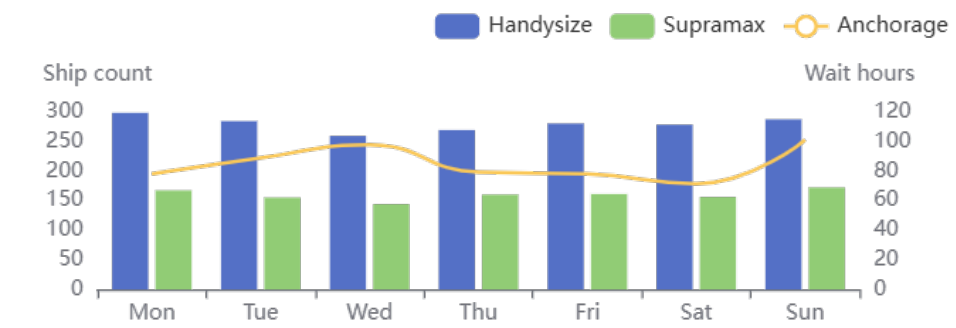


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

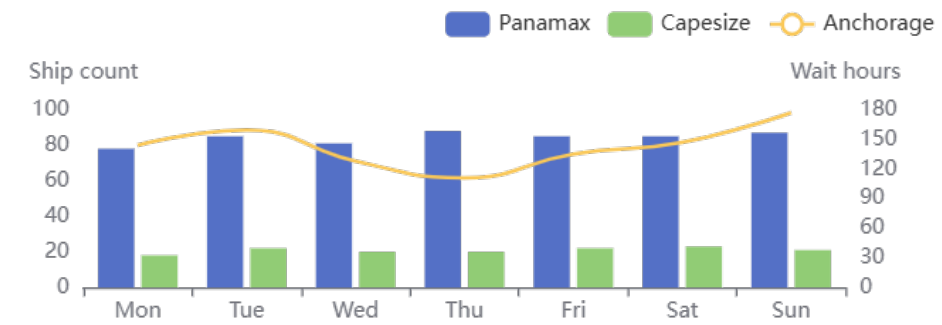
Type	M	T	W	Th	F	Sat	Sun
HDY	298	284	259	269	280	278	287
SMX	167	155	144	160	161	156	172
WT.h.	77.9	88.8	97.6	79.1	77.9	71.4	101



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

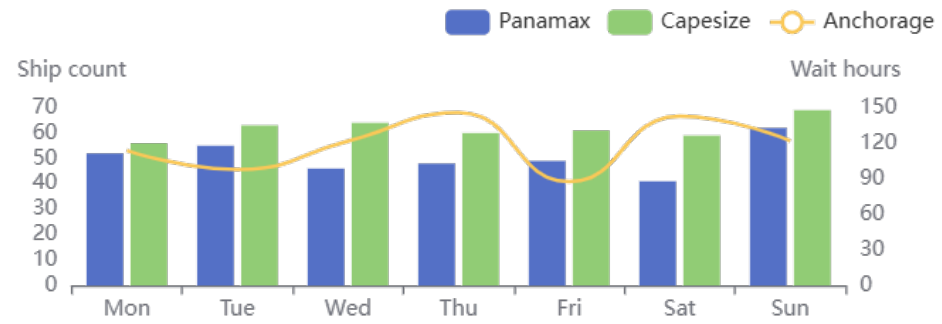
Type	M	T	W	Th	F	Sat	Sun
Pan.	78	85	81	88	85	85	87
Cap	18	22	20	20	22	23	21
WT.h.	144	159.4	127.9	111	135	146.9	177



最近一周澳大利亚区域好望角型和巴拿马型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Capesize and Panamax Num. and Waiting Time Information in Anchorages of Australia

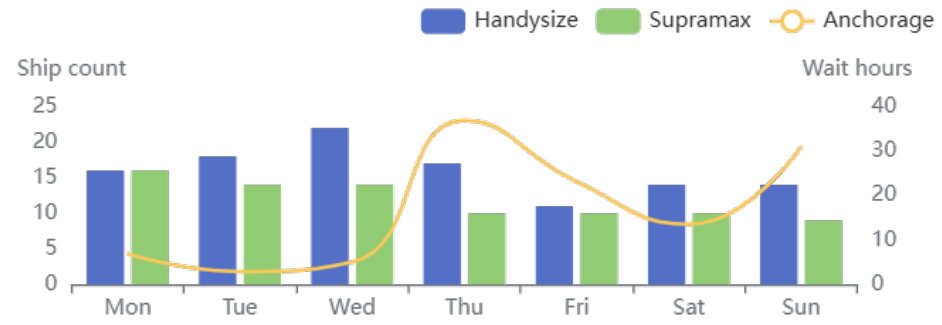
Type	M	T	W	Th	F	Sat	Sun
Pan.	52	55	46	48	49	41	62
Cap	56	63	64	60	61	59	69
WT.h.	113.8	97.8	121.8	145.8	87.5	142.8	122



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

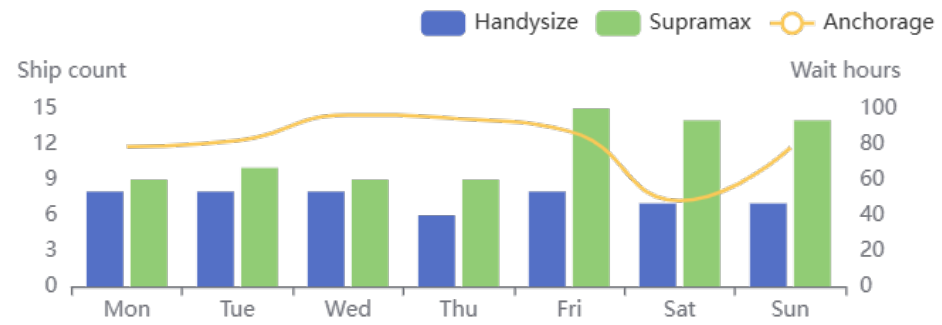
Type	M	T	W	Th	F	Sat	Sun
HDY	16	18	22	17	11	14	14
SMX	16	14	14	10	10	10	9
WT.h.	6.9	2.9	5.05	36.9	23.1	13.5	31



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

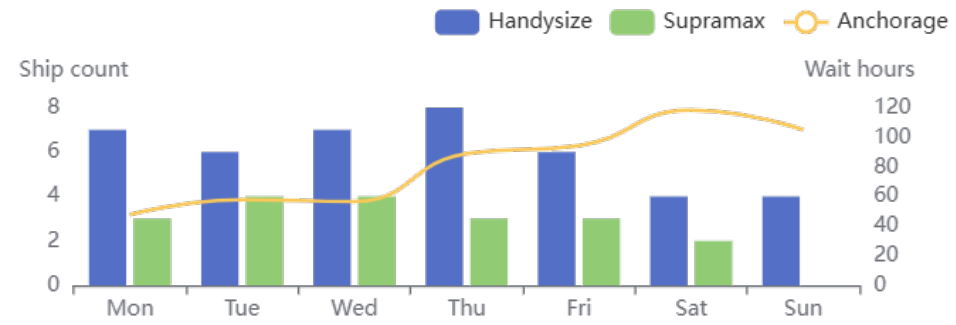
Type	M	T	W	Th	F	Sat	Sun
HDY	8	8	8	6	8	7	7
SMX	9	10	9	9	15	14	14
WT.h.	78.6	82.05	96.5	94.3	87.3	48.2	78



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

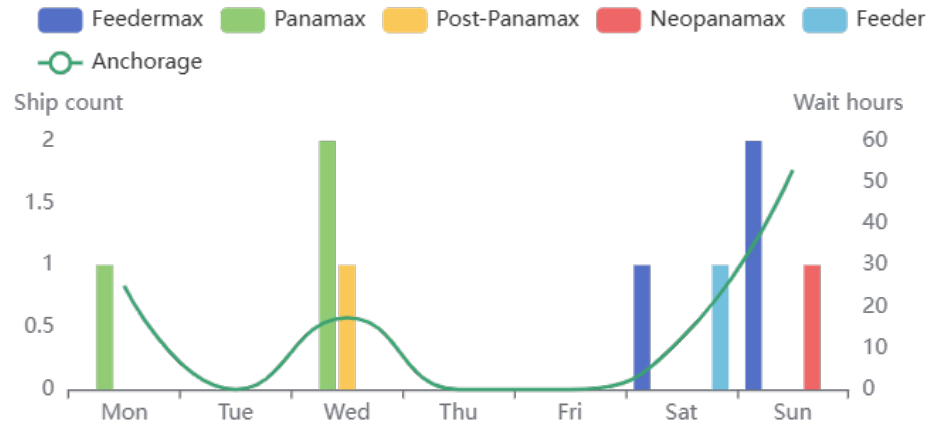
Type	M	T	W	Th	F	Sat	Sun
HDY	7	6	7	8	6	4	4
SMX	3	4	4	3	3	2	0
WT.h.	47.8	57.9	56.6	89	94.4	118.4	105



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

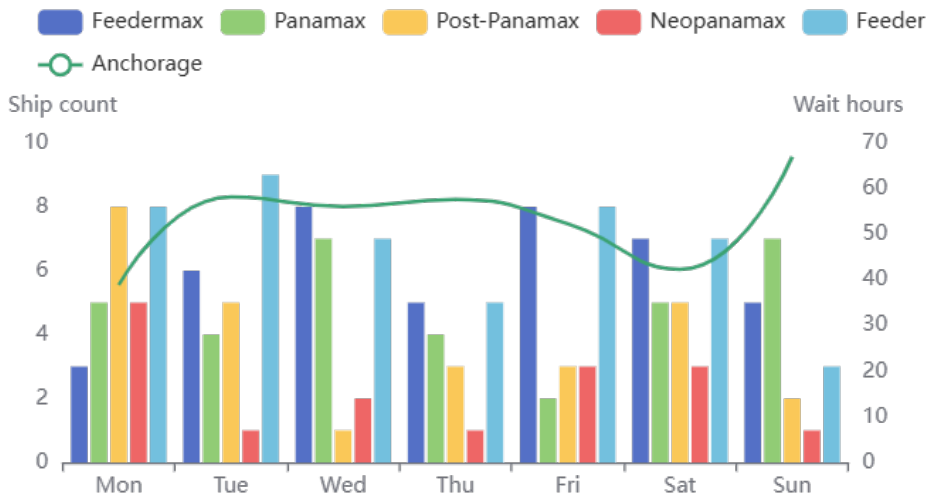
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	1	2
Pan.	1	0	2	0	0	0	0
PPx	0	0	1	0	0	0	0
NPx	0	0	0	0	0	0	1
Fd	0	0	0	0	0	1	0
WT.h.	25	0.0	17.3	0.0	0.0	12.3	53
Ulcw	0	0	0	0	0	0	0



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

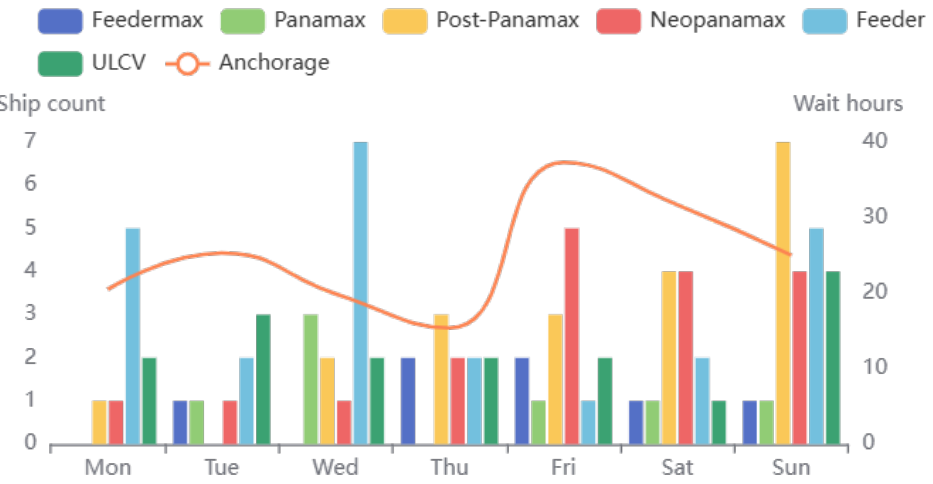
Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	6	8	5	8	7	5
Pan.	5	4	7	4	2	5	7
PPx	8	5	1	3	3	5	2
NPx	5	1	2	1	3	3	1
Fd	8	9	7	5	8	7	3
Ulcw	0	0	0	0	0	0	0
WT.h.	38.9	58.2	56.1	57.6	52.3	42.3	67



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

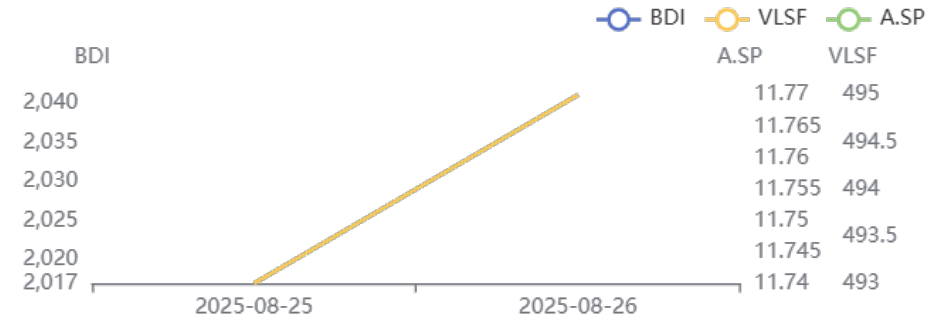
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	1	0	2	2	1	1
Pan.	0	1	3	0	1	1	1
PPx	1	0	2	3	3	4	7
NPx	1	1	1	2	5	4	4
Fd	5	2	7	2	1	2	5
Ulcw	2	3	2	2	2	1	4
WT.h.	20.5	25.3	19.9	15.4	37.3	31.7	25



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

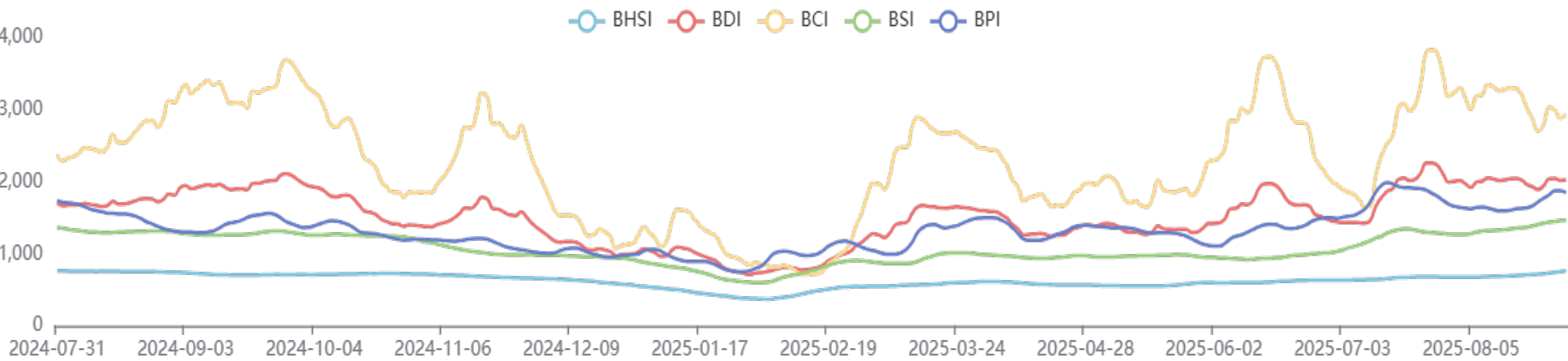
Type	M	T	W	Th	F	Sat	Sun
BDI	1874	1818	1874				
VLSF	493.00	495.00	493.00				
A.SP	11.74	11.77	11.77	11.79	11.79	11.84	



第三部分 航运市场 SHIPPING MARKET

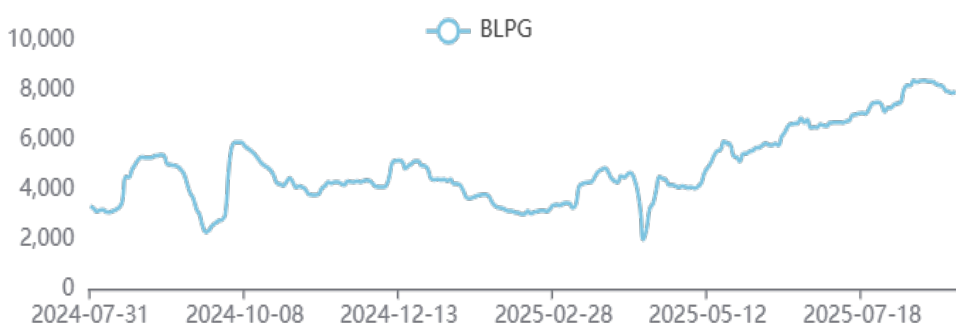
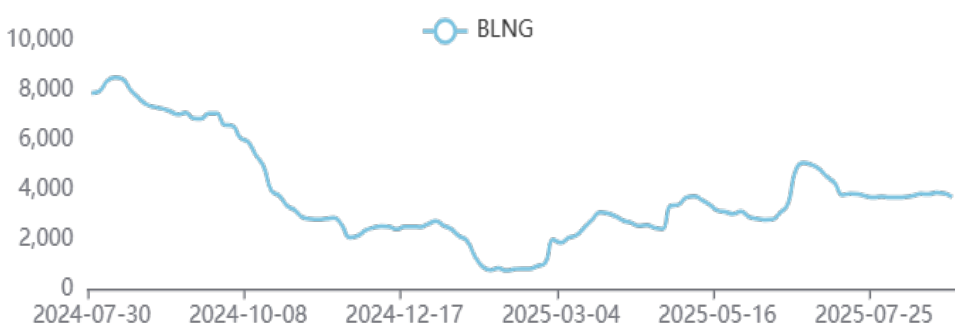
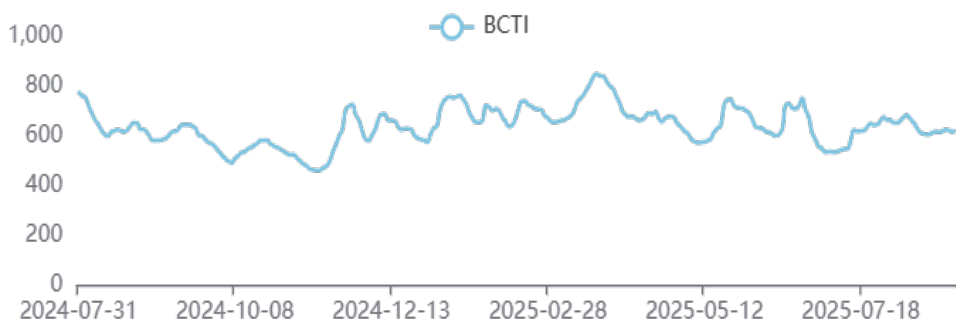
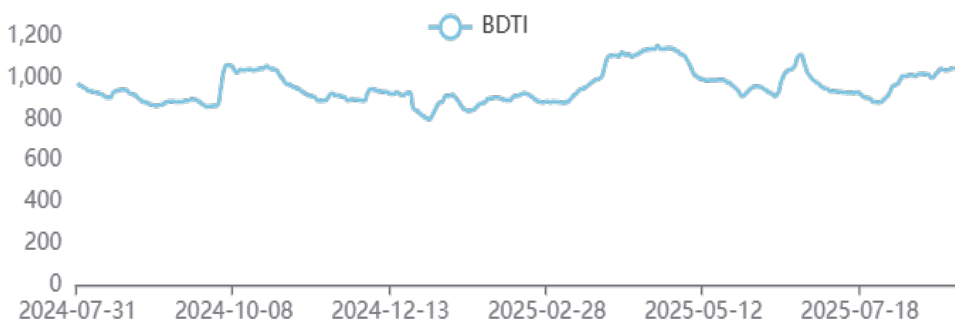
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	2025	81.0	4.17	0.35	10.84
BCI	2925	132.0	4.73	-11.26	-6.22
BPI	1847	77.0	4.35	12.35	38.77
BSI	1465	41.0	2.88	15.45	11.66
BHSI	767	42.0	5.79	13.13	2.95



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1045	3.0	0.29	9.31	18.21
BCTI	622	4.0	0.65	-4.6	-0.48
BLNG	3690	-180.0	-4.65	0.27	-49.1
BLPG	7931	-217.0	-2.66	6.99	48.46



第四部分 运力分布 SUPPLY DISTRIBUTION

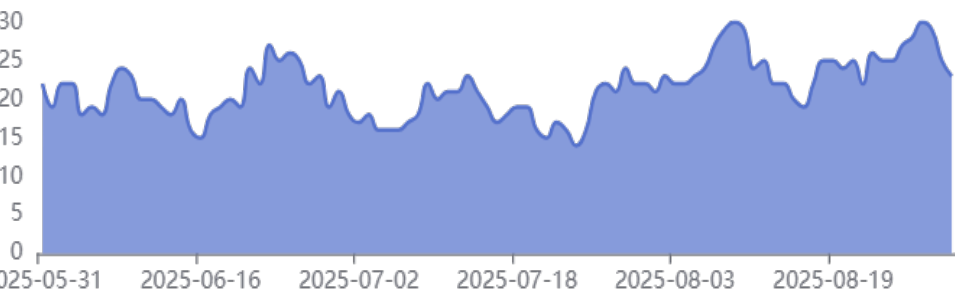


好望角型散货船 Capesize

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	25	27	28	30	29	25	23



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.

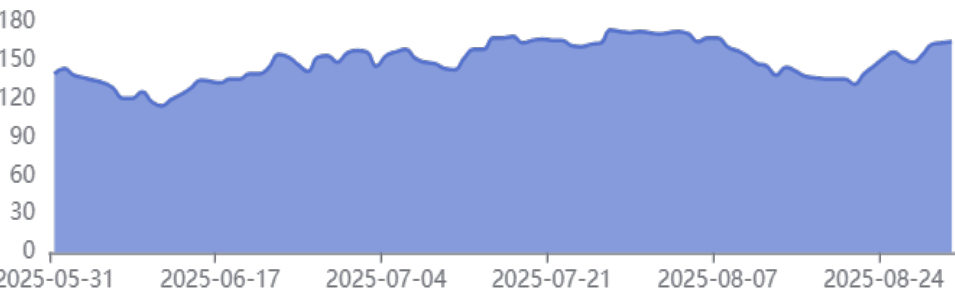
Type	M	T	W	Th	F	Sat	Sun
Cape	38	37	32	37	29	26	24

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.

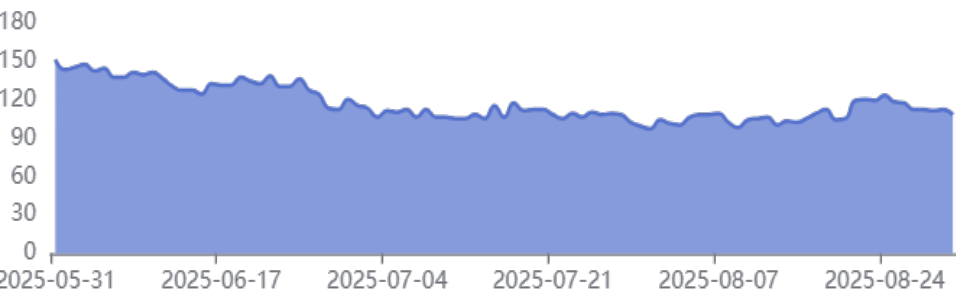
Type	M	T	W	Th	F	Sat	Sun
Pan.	156	151	148	154	162	163	164



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.

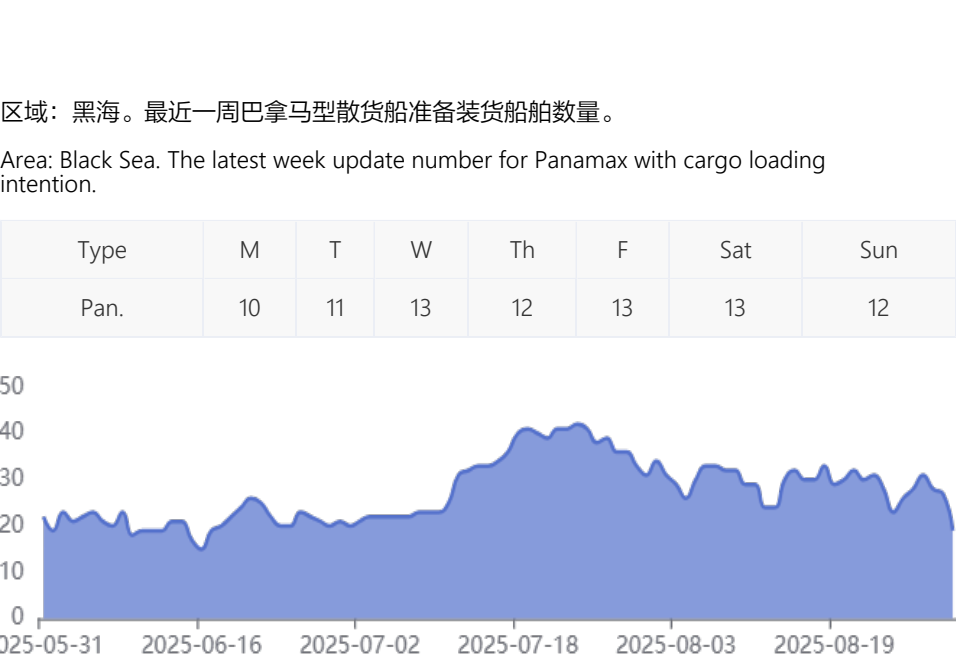
Type	M	T	W	Th	F	Sat	Sun
Cape	118	117	112	112	111	112	108



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.

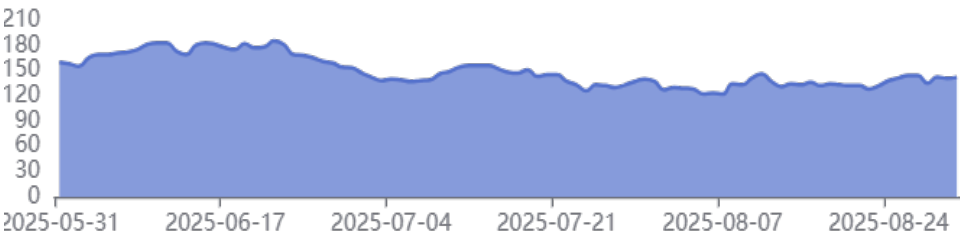
Type	M	T	W	Th	F	Sat	Sun
Pan.	10	11	13	12	13	13	12



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.	141	144	144	135	142	141	142

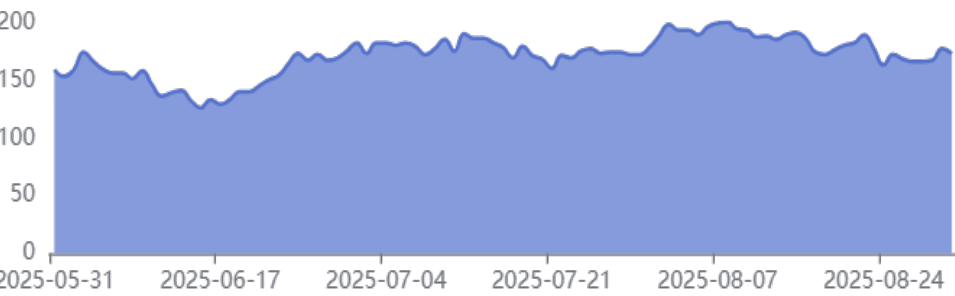


超大灵便型散货 SUPRAMAX

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.

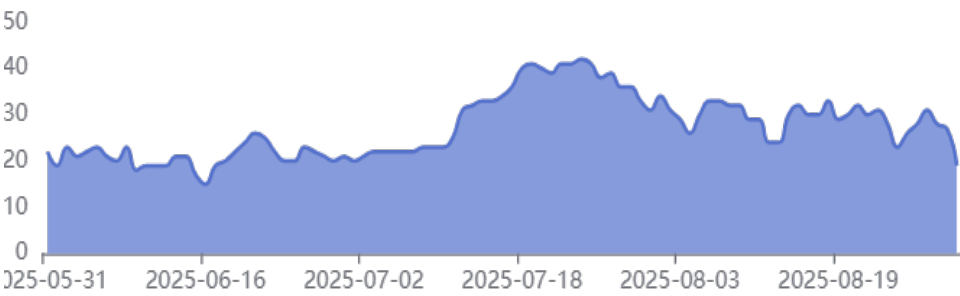
Type	M	T	W	Th	F	Sat	Sun
SMX	172	168	166	166	167	177	173



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.

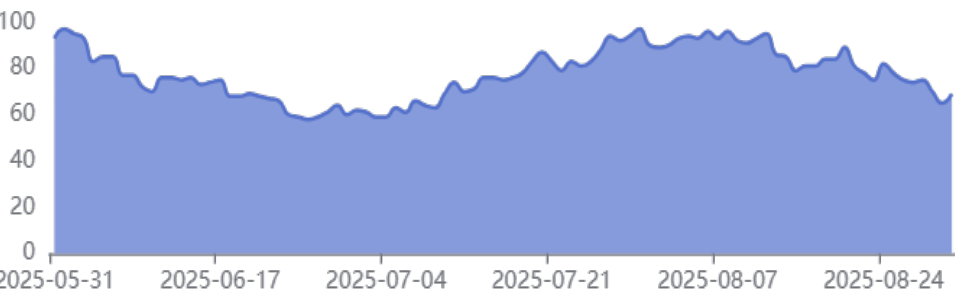
Type	M	T	W	Th	F	Sat	Sun
SMX	23	26	28	31	28	27	19



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.

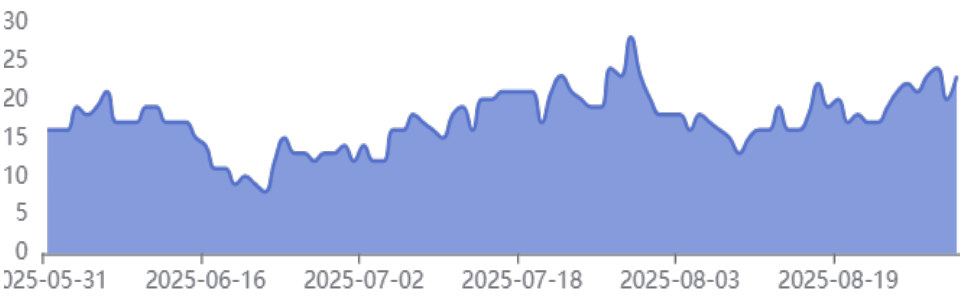
Type	M	T	W	Th	F	Sat	Sun
SMX	21	22	21	23	24	20	23



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.

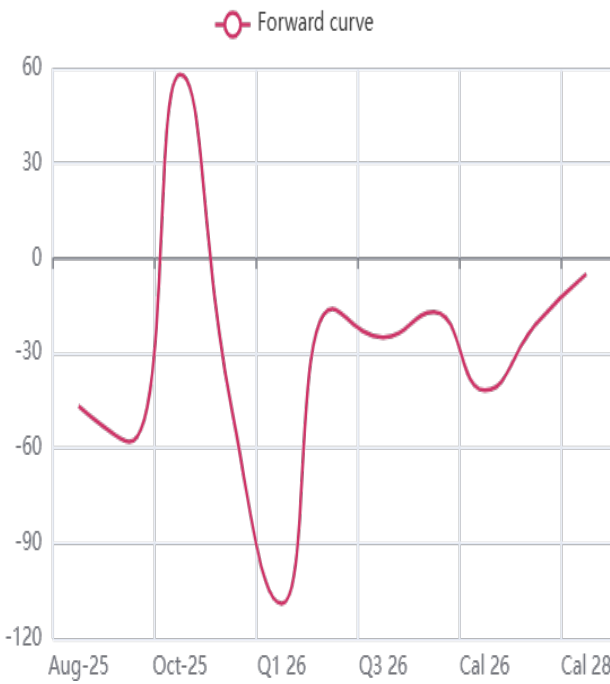
Type	M	T	W	Th	F	Sat	Sun
SMX	78	75	74	75	70	65	69



第五部分 远期运价协议 FFA

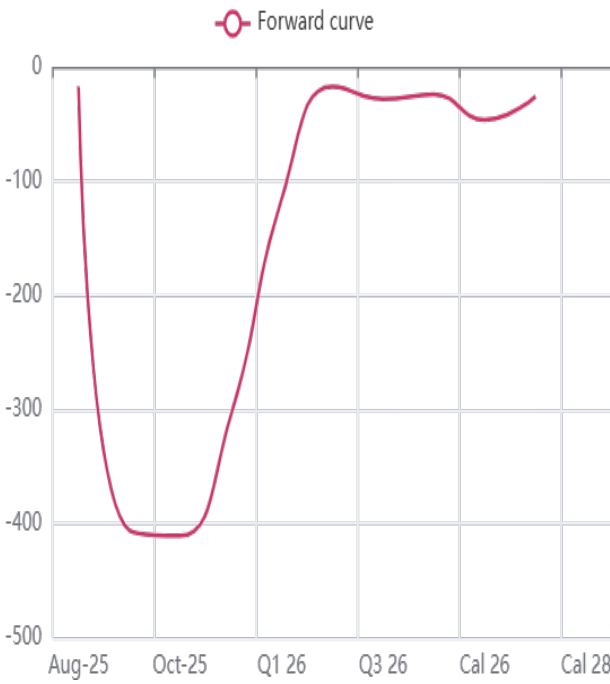
好望角型散货船Capesize

5TC	\$/day	WoW	
Aug-25	25,741.30	-46.7	-0.2 %
Sep-25	27,500.00	-58.0	-0.2 %
Oct-25	28,754.00	58.0	0.2 %
Q4 25	26,450.00	-46.0	-0.2 %
Q1 26	16,494.67	-109.0	-0.7 %
Q2 26	20,892.00	-16.0	-0.1 %
Q3 26	23,954.00	-25.0	-0.1 %
Q4 26	24,475.00	-17.0	-0.1 %
Cal 26	21,453.92	-41.75	-0.2 %
Cal 27	20,775.00	-21.0	-0.1 %
Cal 28	19,483.00	-5.0	0.0 %



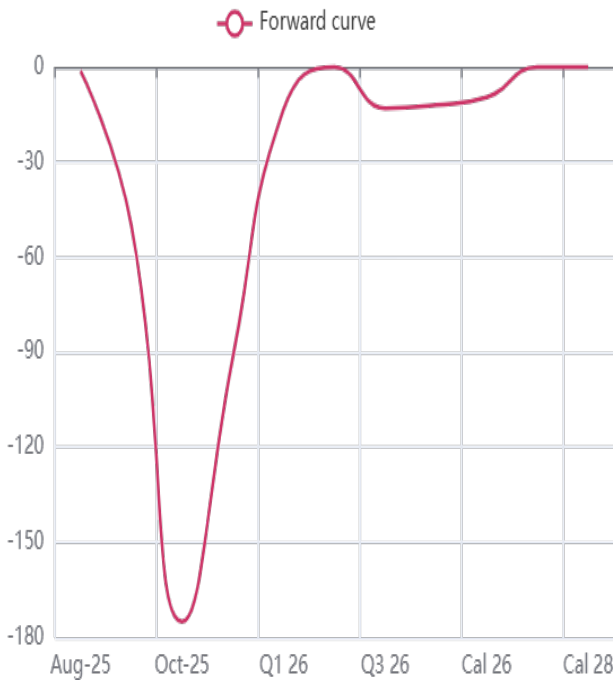
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Aug-25	13,825.80	-17.2	-0.1 %
Sep-25	15,011.00	-406.0	-2.6 %
Oct-25	14,927.00	-411.0	-2.7 %
Q4 25	14,000.33	-305.33	-2.1 %
Q1 26	10,659.00	-116.0	-1.1 %
Q2 26	12,600.00	-17.0	-0.1 %
Q3 26	12,183.00	-28.0	-0.2 %
Q4 26	11,610.00	-24.0	-0.2 %
Cal 26	11,763.00	-46.25	-0.4 %
Cal 27	10,957.00	-26.0	-0.2 %
Cal 28	-	-	-



灵便型散货船Handysize

7TC	\$/day	WoW	
Aug-25	12,683.80	-1.2	0.0 %
Sep-25	13,863.00	-50.0	-0.4 %
Oct-25	13,763.00	-175.0	-1.3 %
Q4 25	13,079.33	-91.67	-0.7 %
Q1 26	9,750.00	-13.33	-0.1 %
Q2 26	11,975.00	0.0	0.0 %
Q3 26	11,925.00	-13.0	-13.0
Q4 26	11,688.00	-12.0	-0.1 %
Cal 26	11,334.50	-9.58	-0.1 %
Cal 27	10,850.00	0.0	0.0 %
Cal 28	10,825.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	520.5	438.0	679.5	82.5	-3.0	-3.51	-10.81
Singapore	507.0	416.0	657.0	91.0	1.0	1.11	-10.34
Rotterdam	471.0	408.5	650.0	62.5	-1.5	-2.34	-7.41
Fujairah	491.5	419.0	668.0	72.5	13.0	21.85	18.85
Houston	503.0	397.0	732.0	106.0	6.5	6.53	-1.85

(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	193.0		0.0	0.0	-1.03	-1.03
Maize	226.0		0.0	0.0	1.35	13.0
Soybeans	216.0		0.0	0.0	3.35	9.09
Rice	162.0		-1.0	-0.61	-3.57	-34.15
Barley	227.0		0.0	0.0	0.44	11.27
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	64.11	1.3	2.07	-4.0	-15.39
Brent	USD/Bbl	68.15	2.19	3.32	-2.8	-14.79
Natural Gas	USD/MMBtu	2.67	-0.2	-6.97	-14.42	32.84
Gasoline	USD/Gal	2.13	0.05	2.4	-0.47	-6.99
Heating Oil	USD/Gal	2.32	0.09	4.04	-4.13	-0.43
Ethanol	USD/Gal	1.86	0.1	5.68	5.68	1.64
Naphtha	USD/T	560.12	5.08	0.92	1.31	-15.0
Propane	USD/Gal	0.68	0.01	1.49	-5.56	-11.69
Uranium	USD/Lbs	74.6	1.2	1.63	4.63	-9.47
Methanol	CNY/T	2270.0	-15.0	-0.66	-3.61	-7.12
TTF Gas	EUR/MWh	33.34	2.23	7.17	0.36	-9.16
UK Gas	GBp/thm	82.6	5.91	7.71	2.85	-6.14
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.44	-0.02	-0.45	-20.0	5.21
Coal	USD/T	111.3	0.3	0.27	-3.64	-23.35
Steel	CNY/T	3113.0	-13.0	-0.42	-5.18	1.97
Iron Ore	USD/T	101.6	-0.02	-0.02	2.97	3.62
Aluminum	USD/T	2617.35	46.7	1.82	6.74	2.96
Lithium	CNY/T	85683.0	1100.0	1.3	17.13	15.79
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	3378.6	37.67	1.13	1.94	33.86
Silver	USD/t.oz	38.69	0.6	1.58	1.87	28.54
Platium	null	1324.7	-20.4	-1.52	-4.75	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.16		-0.01	-0.85	0.87	3.57
USD/CNY	7.16		-0.02	-0.28	-0.28	0.56

第八部分 本周话题 WEEKLY TOPIC



一艘向俄罗斯运送伊朗武器的船只被乌克兰击沉

2025年9月18日，乌克兰宣称首次使用无人机击沉了一艘俄罗斯商船。据称该船当时正为俄罗斯运输伊朗的武器部件。无人机对里海的奥利亚港发动了袭击，5200 载重吨的多用途“PORT OLYA 4”轮（2014 年建造）成为袭击目标。网络流传的照片显示该船船尾受损严重并倾斜进水，该船已经沉没。俄罗斯当局随后证实了此事件属于乌克兰对码头的无人机袭击事件。据HIFLEET航运大数据显示这艘件杂货船在里海运行，悬挂俄罗斯国旗，8月1号抵达伊朗位于里海南部AMIRABAD港口。据HIFLEET船舶档案数据显示，该船2024年9月10号已经被OFAC列为制裁船舶。

阿斯特拉罕州州长表示，所有无人机均已被电子战手段压制或摧毁，该港口基础设施未受任何损害，一艘船只因坠毁无人机掉落的碎片而受损。市场对此次袭击的后果图像进行了分析和审查，图像显示该船只在抛锚时沉没，船桥和上层建筑遭受了大面积的热损伤。所有船员应该没有受伤并均已获救。

市场讨论，这应该是乌克兰无人驾驶航空系统袭击俄罗斯商船并首次导致商船沉没的案例。这也是对奥利亚港的首次此类袭击，也是在里海首次成功击中一艘船只。奥利亚港 4 号码头由受美国制裁的俄罗斯 MG-弗洛特公司控制。乌克兰政府称奥利亚是伊朗运往俄罗斯的军事

物资的重要物流枢纽。

《基辅独立报》称，该码头用于接收“沙赫德”型无人机的零部件和弹药。乌克兰军方表示，此次袭击是更大规模行动的一部分，旨在打击俄罗斯发动空袭的能力以及其战争行动的持续性。

俄罗斯和乌克兰的战争备受各方关注，航运市场也因这个战争发生了很大的变化，也催生了史上最大的影子船队。祈祷这个可怕的战争早日结束，让饱受战争摧残的老百姓早日回归平静。

On approximately September 18, 2025, Ukraine claimed that it had for the first time used a drone to sink a Russian merchant ship. It was said that the ship was transporting Iranian weapons components for Russia at that time. The drone launched an attack on the Olya Port in the Caspian Sea, targeting the 5,200-ton multi-purpose "PORT OLYA 4" vessel (built in 2014). Photos circulating online showed that the stern of the ship was severely damaged and tilted into water, and the ship had sunk. The Russian authorities subsequently confirmed that this incident was a drone attack by Ukraine on the port.

According to the shipping big data of HIFLEET, this container cargo ship was operating in the Caspian Sea, flying the Russian flag. It arrived at the AMIRABAD port in the southern part of the Caspian Sea in Iran on August 1st. According to the ship archives of HIFLEET, this vessel was listed as a sanctioned vessel by OFAC on September 10th, 2024.

The governor of Astrakhan Region stated that all the drones had been suppressed or destroyed by electronic warfare measures, and the port infrastructure was not damaged in any way. One vessel was damaged by debris from the crashed drone. The market analyzed and reviewed the images of the consequences of this attack. The images showed that the vessel sank while anchored, and the bridge and upper structure suffered extensive thermal damage. All the crew members should not have been injured and have all been rescued.

Market discussion: This should be the case where the Ukrainian unmanned aerial system attacked a Russian merchant ship and for the first time caused the ship to sink. This was also the first such attack on the Olya Port, and it was the first successful strike on a vessel in the Caspian Sea. The 4th dock of Olya Port is controlled by the Russian MG-Floret company, which is subject to US sanctions. The Ukrainian government claims that Olya is an important logistics hub for Iranian military supplies transported to Russia.

The Kiev Independent newspaper reported that this port is used to receive components and ammunition for the "Shahed" type drones. The Ukrainian military stated that this attack is part of a larger operation aimed at weakening Russia's ability to conduct air strikes and the sustainability of its war efforts.

The war between Russia and Ukraine has attracted much attention from all sides. The shipping market has also undergone significant changes due to this war, and it has even given rise to the largest shadow fleet in history. Pray that this terrifying war will end soon, and that the people who have suffered from the war can return to peace as soon as possible.