



# 2026年 第11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

租船AI是一款利用大模型技术自动整理船货盘邮件、快速检索公开/私密船盘与货盘，并帮助您更高效发布信息的智能工具。  
Chartering AI is an AI-powered tool that automatically organises tonnage and cargo circulars, enables fast search and filtering, and helps you publish open tonnage or cargo requirements with ease.

主要用途Key benefits:

- 01 每天收到大量船货盘邮件，阅读工作量大，找船特别费时。HiFleet租船AI使用大模型技术帮您整理船货盘邮件，能高效检索船盘与货盘。  
Automatically structures tonnage/cargo emails for efficient review.
- 02 按区域、港口附近智能检索船盘与货盘。Smart search by region or port proximity.
- 03 自动识别发件人角色（船东/OP/经纪人）。Identifies sender type (Owner/Operator/Broker).
- 04 标注 PSC 风险、制裁风险、吊机、舱口等关键技术信息。Tags key technical & risk fields (PSC, sanctions, cranes, hatch specs, etc.).
- 05 支持公开与私密两种模式，适用于不同公司需求。Supports both Public and Private modes for different confidentiality needs.
- 06 按港口多维度筛选预抵船舶，快速锁定目标船舶。Expected Arriving Vessels with multi-dimensional filters for quick targeting.

# HiFleet

## LLM AI Shipping Chartering Tool

Expected Arrivals Screening

Public or private service modes

AI analysis of cargo & tonnage offers chartering emails

Fast search & filtering of cargo/tonnage offers

Search cargo & tonnage offers by port & its nearby

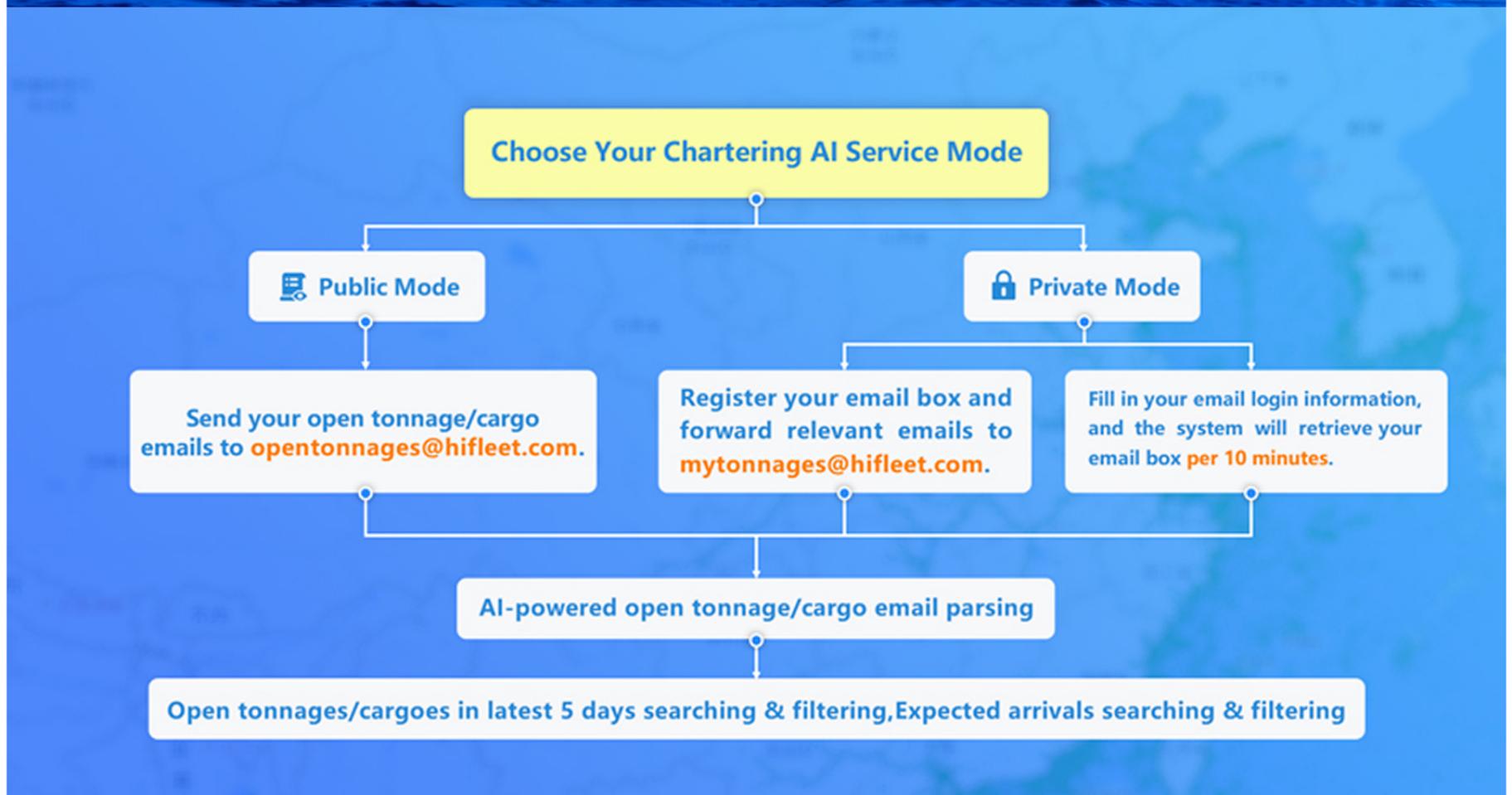


Basic authenticity screening for tonnage offers

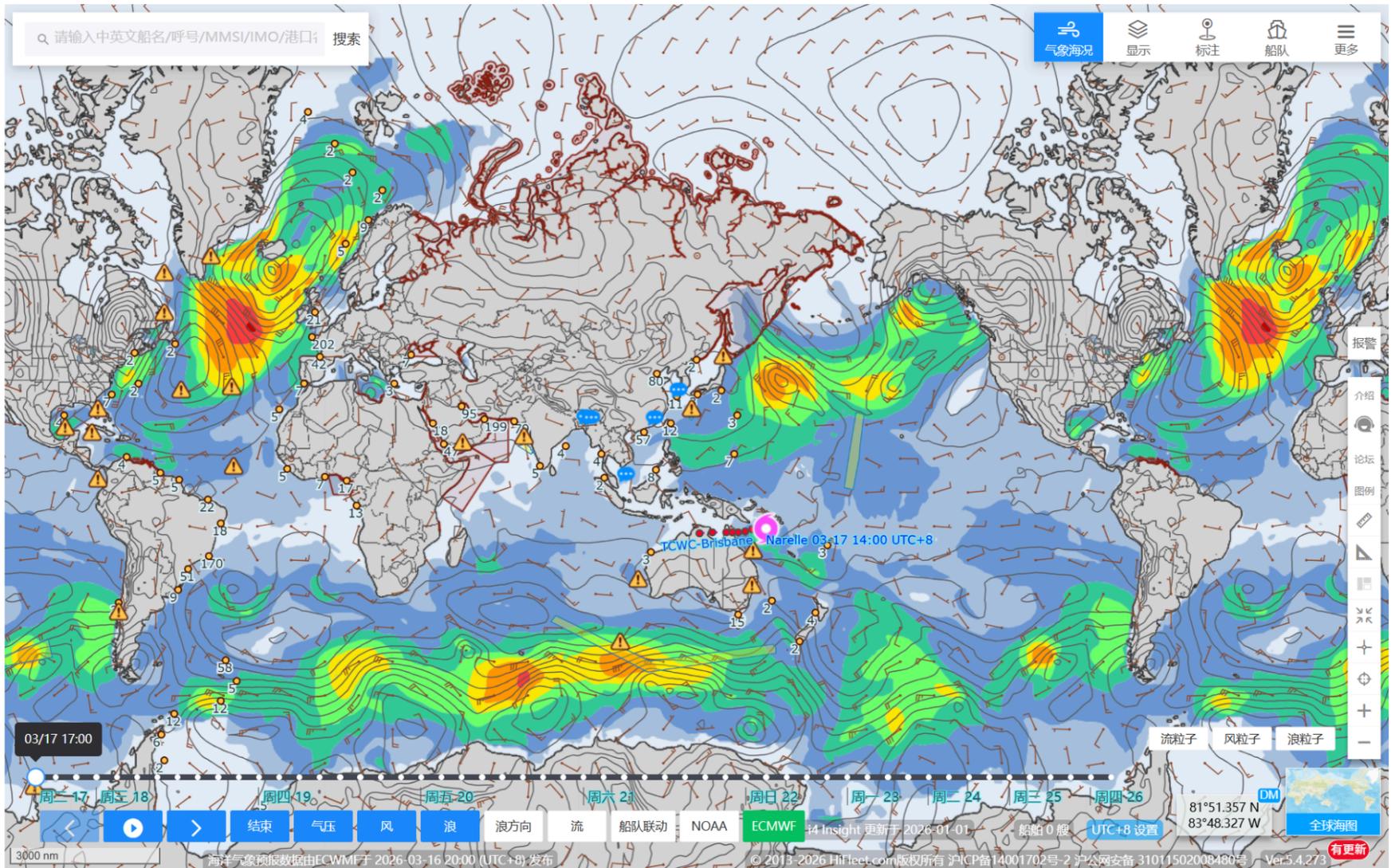
Sanctions-risk alerts for tonnage offers

Basic analysis of 3-year vessel performance (speed/consumption)

Port-of-call country tags (e.g., CIS, AU, BH)



# 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1488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 1488 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4-6级，有中浪；黄海风力3-5级，有中浪；东海风力4-5级，有中浪；台湾海峡5-7级风，有巨浪；南海大部海域风力5-7级，有巨浪。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 is moderate with moderate sea. Yellow Sea the wind is moderate with moderate sea. And China East Sea is moderate with moderate sea. The wind in the Taiwan Strait becomes better with moderate sea. In most of the South China Sea the wind becomes better with rough sea occasionally in the beginning of the next week.

## 海盗事件 Piracy

2026年3月6日，新加坡海峡。七名未获许可的持刀人员登上了一艘正在航行中的油轮，并进入了机舱。警报响起，广播系统发出通知，船员集合完毕，随后展开了搜查。警报响起，广播系统发出通知，船员集合完毕，随后进行了搜查。该事件已上报给新加坡水上事故调查局和新加坡海岸警卫队，他们随后护送该船只离开。全体船员均安全无恙，未发现财物被盗。06.03.2026: 1900 UTC: Posn: 01:02.3N - 103:40.2E, Singapore Straits. Seven unauthorised persons armed with knives boarded a tanker underway and entered the engine room. Alarm raised, public address announcement made, crew mustered, and a search was conducted. Incident reported to VTIS and Singapore Coast Guard who then escorted the vessel. All crew safe and nothing reported stolen.

## 海上事件 Marine Incidents

2026年3月2日，一名海员在阿曼海岸附近一艘油轮遭遇袭击后不幸身亡。这艘载重 74000吨的“MKD Vyom”号货轮（于 2007 年建造）今天遭到了一颗炮弹的袭击，导致船上发生爆炸并引发火灾，其船长已证实了这一情况。On March 2, 2026, a crew tragically lost his life after an attack on an oil tanker near the coast of Oman. The 74,000-ton "MKD Vyom" cargo ship (built in 2007) was hit by a shell today, causing an explosion and fire on board. The captain has confirmed this situation.

## 其它 Others

没有 Nil

## 备注 Remark

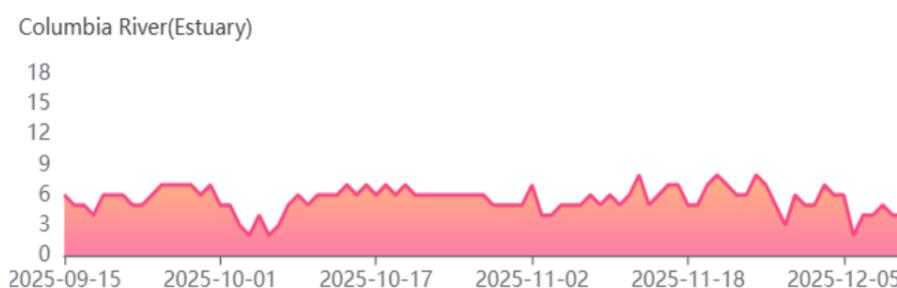
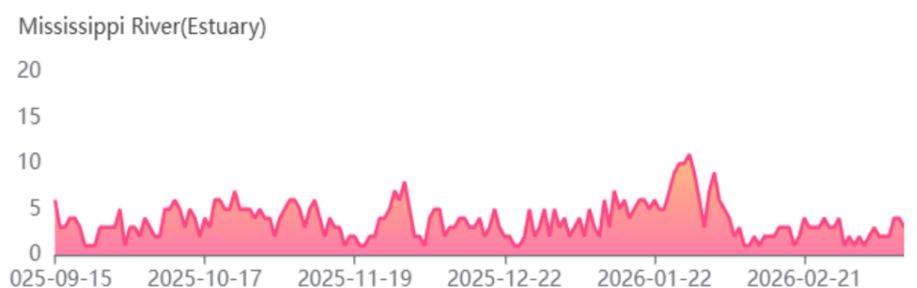
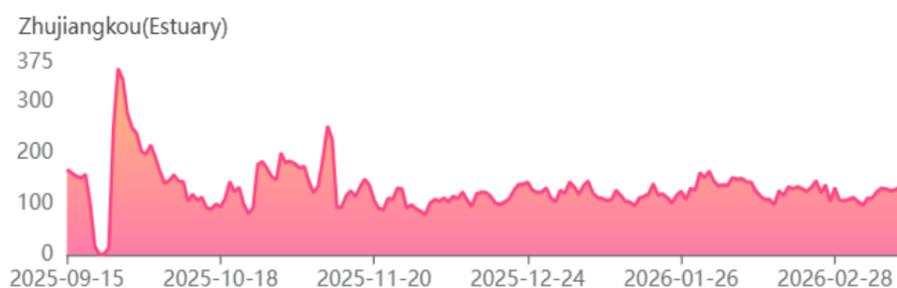
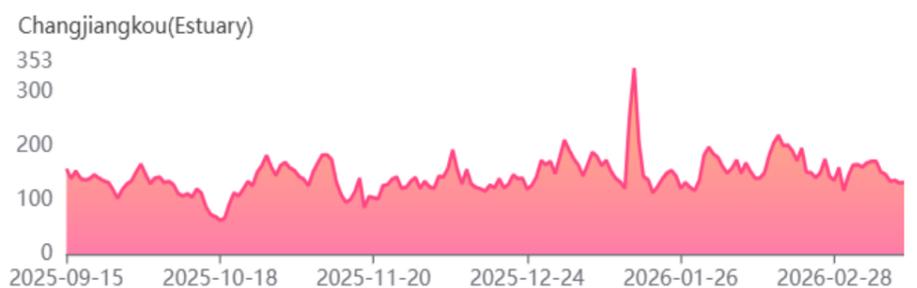
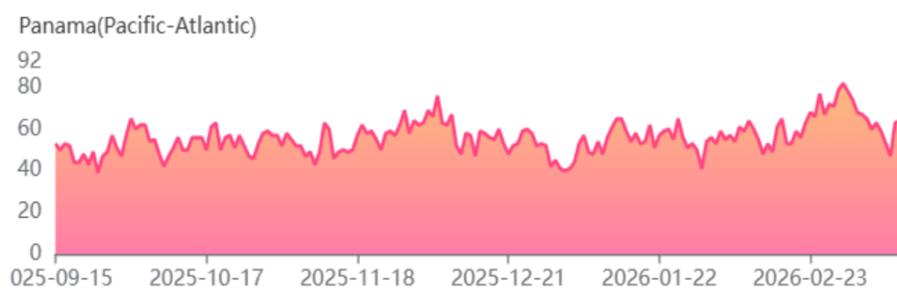
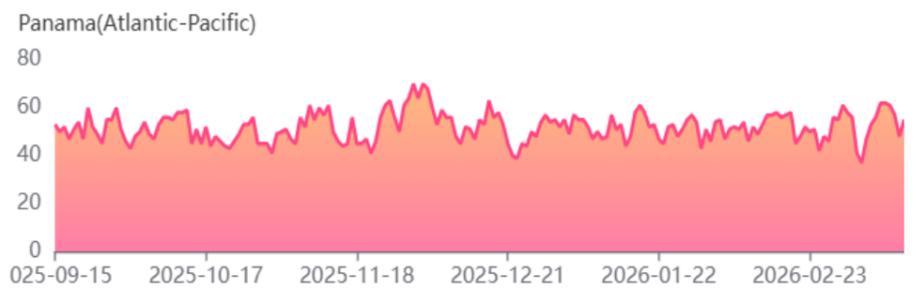
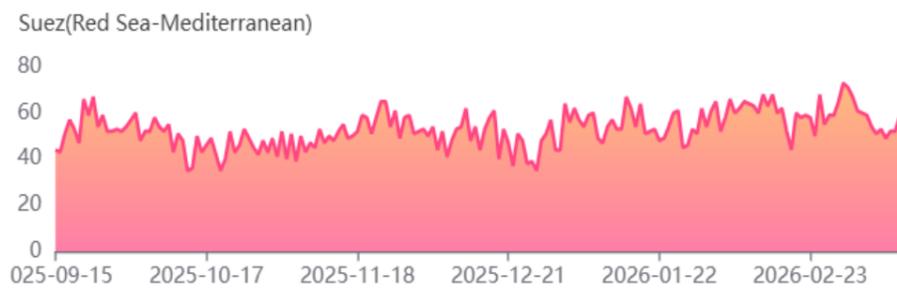
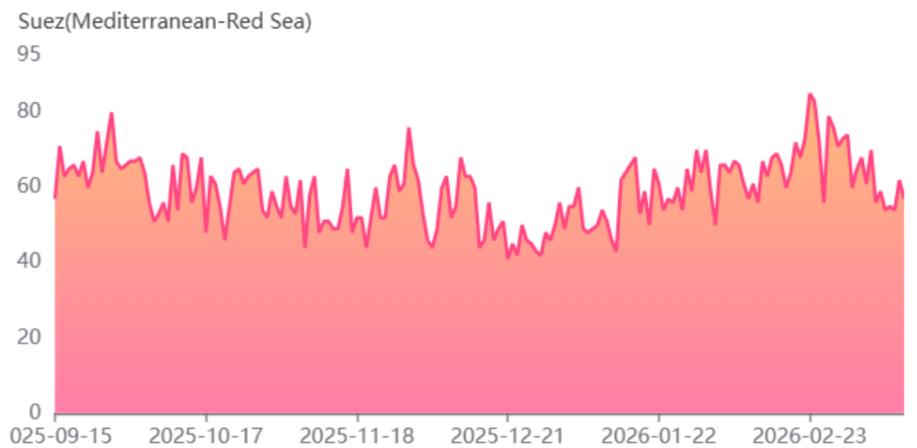
本报告数据截止时间为2026年3月15日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on March 15th of 2026; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

## 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	54	1692	-86	14
Miss.Riv.	3	70	13	-80
CJK	132	4678	-75	278
Pa.Atlan.	55	1533	46	29
Colum.Riv.	5	193	3	47
Suez.Med.	57	1930	-75	162
Pa.Pac.	62	1864	-102	260
ZJK	133	3512	156	-228

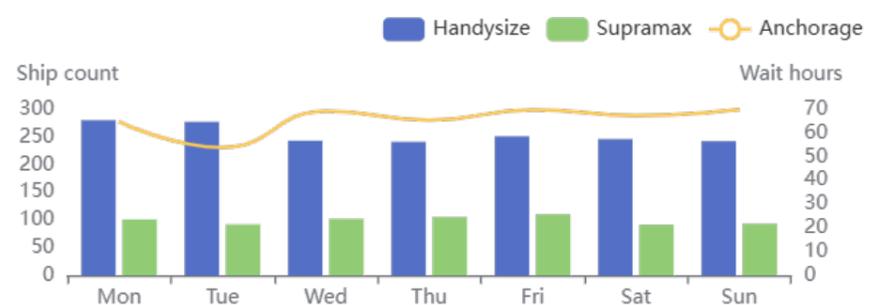


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

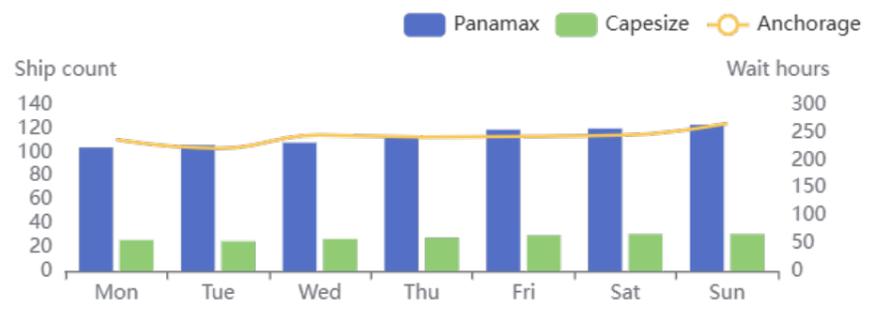
Type	M	T	W	Th	F	Sat	Sun
HDY	280	277	243	241	251	246	242
SMX	101	92	102	105	110	91	93
WT.h.	64.8	53.9	69.2	65.4	69.7	67.4	69.9



## 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

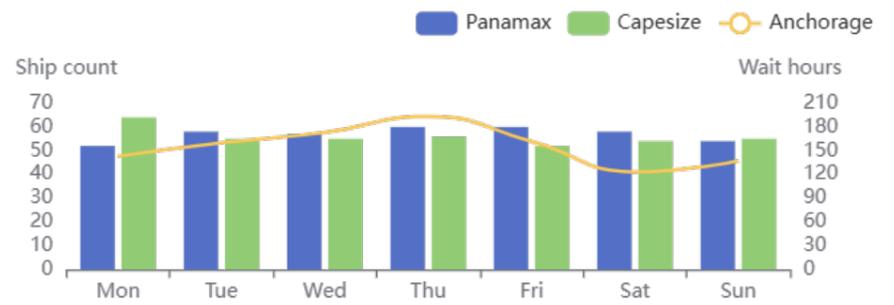
Type	M	T	W	Th	F	Sat	Sun
Pan.	104	106	108	113	119	120	123
Cap	26	25	27	28	30	31	31
WT.h.	237.4	221.5	245.5	241.9	243	245.4	266.6



## 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

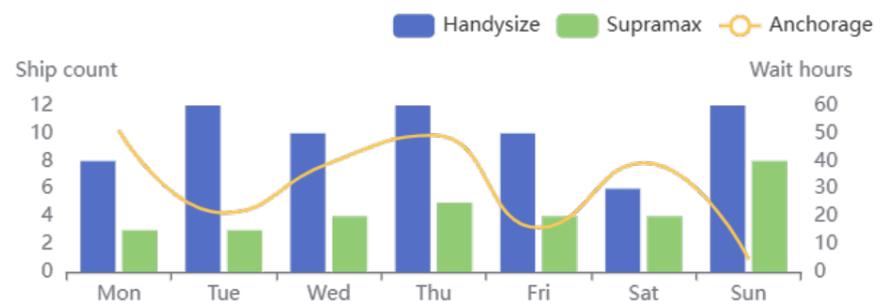
Type	M	T	W	Th	F	Sat	Sun
Pan.	52	58	57	60	60	58	54
Cap	64	55	55	56	52	54	55
WT.h.	143	159.9	173.1	193.4	161.7	123.2	137.2



## 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 &amp; Handy Num. and Waiting Time Information in Anchorages of Black Sea

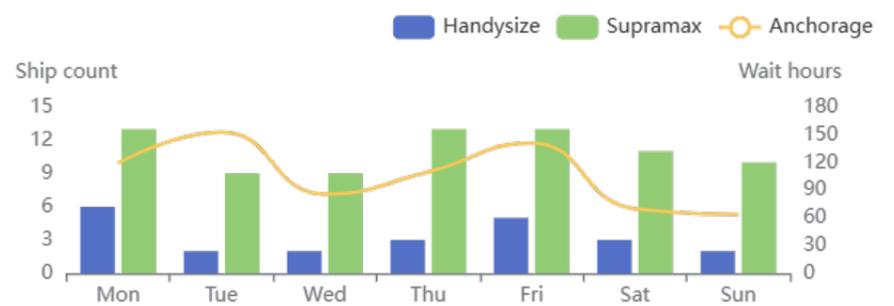
Type	M	T	W	Th	F	Sat	Sun
HDY	8	12	10	12	10	6	12
SMX	3	3	4	5	4	4	8
WT.h.	51	21.3	39.2	49.3	15.95	39.35	4.65



## 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

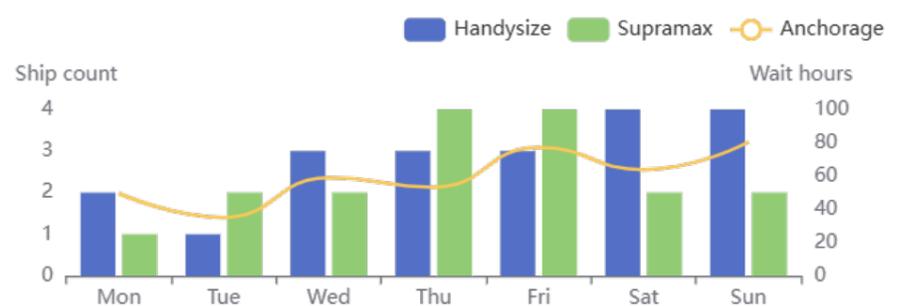
Type	M	T	W	Th	F	Sat	Sun
HDY	6	2	2	3	5	3	2
SMX	13	9	9	13	13	11	10
WT.h.	119.2	153	85.8	109.8	141.1	69.9	63.65



## 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

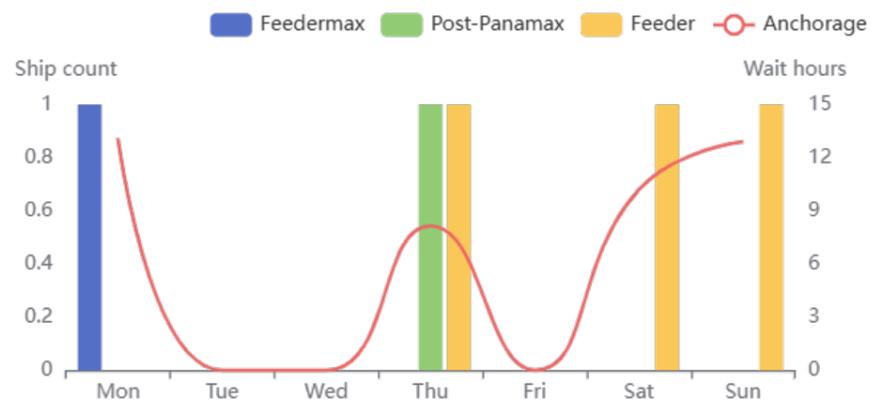
Type	M	T	W	Th	F	Sat	Sun
HDY	2	1	3	3	3	4	4
SMX	1	2	2	4	4	2	2
WT.h.	49.6	35.1	59.1	53.3	77.3	63.8	80.5



## 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

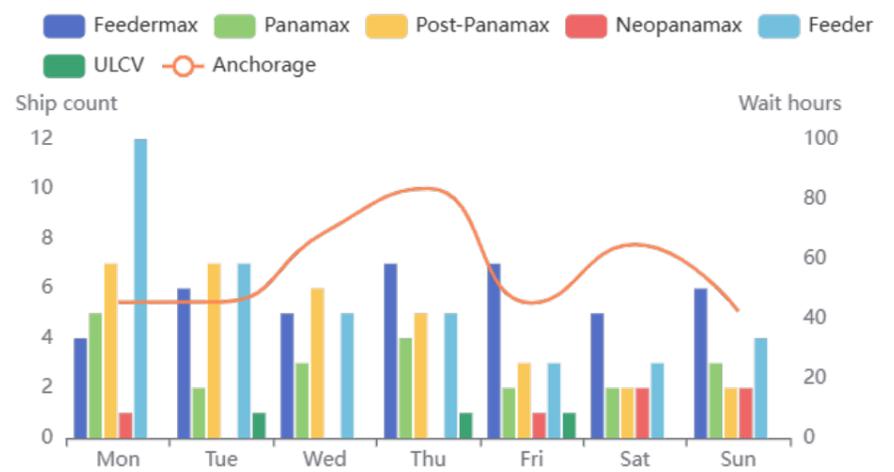
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	0	0	0	0	0	0
Pan.	0	0	0	0	0	0	0
PPx	0	0	0	1	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	1	0	1	1
WT.h.	13.1	0.0	0.0	8.15	0.0	10.2	12.9
UlcV	0	0	0	0	0	0	0



## 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

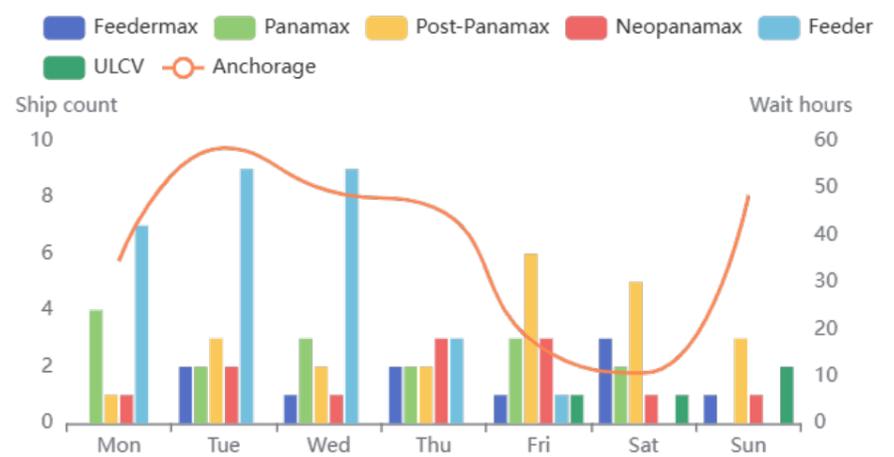
Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	6	5	7	7	5	6
Pan.	5	2	3	4	2	2	3
PPx	7	7	6	5	3	2	2
NPx	1	0	0	0	1	2	2
Fd	12	7	5	5	3	3	4
UlcV	0	1	0	1	1	0	0
WT.h.	45.5	45.6	68.9	83.55	45.2	64.8	42.4



## 最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

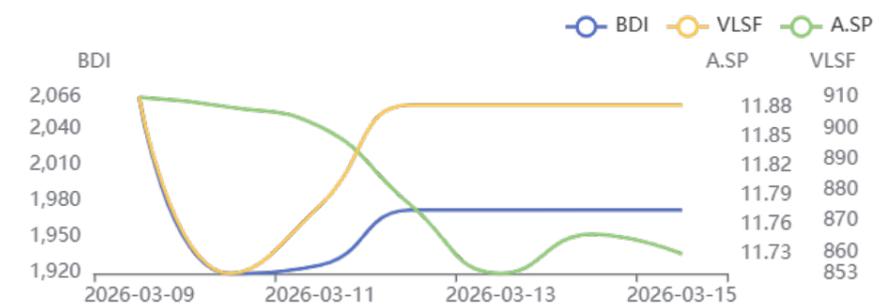
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	2	1	2	1	3	1
Pan.	4	2	3	2	3	2	0
PPx	1	3	2	2	6	5	3
NPx	1	2	1	3	3	1	1
Fd	7	9	9	3	1	0	0
UlcV	0	0	0	0	1	1	2
WT.h.	34.5	58.5	49.4	45.9	16.5	10.7	48.5



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

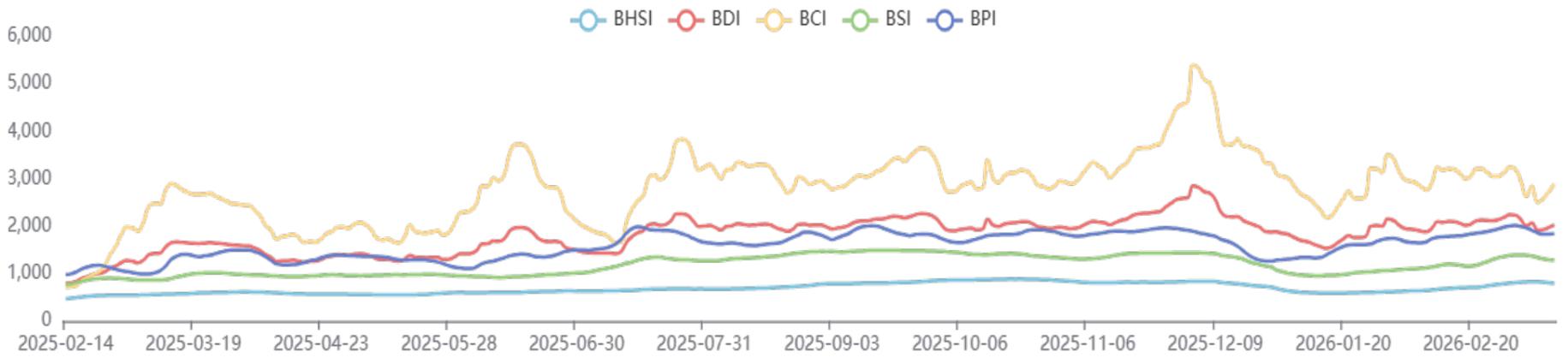
Type	M	T	W	Th	F	Sat	Sun
BDI	1914	1861	1831	1835	1835	1835	1835
VLSF	910.00	853.00	875.00	907.50	907.50	907.50	907.50
A.SP	11.89	11.88	11.86	11.78	11.71	11.75	11.75



# 第三部分 航运市场 SHIPPING MARKET

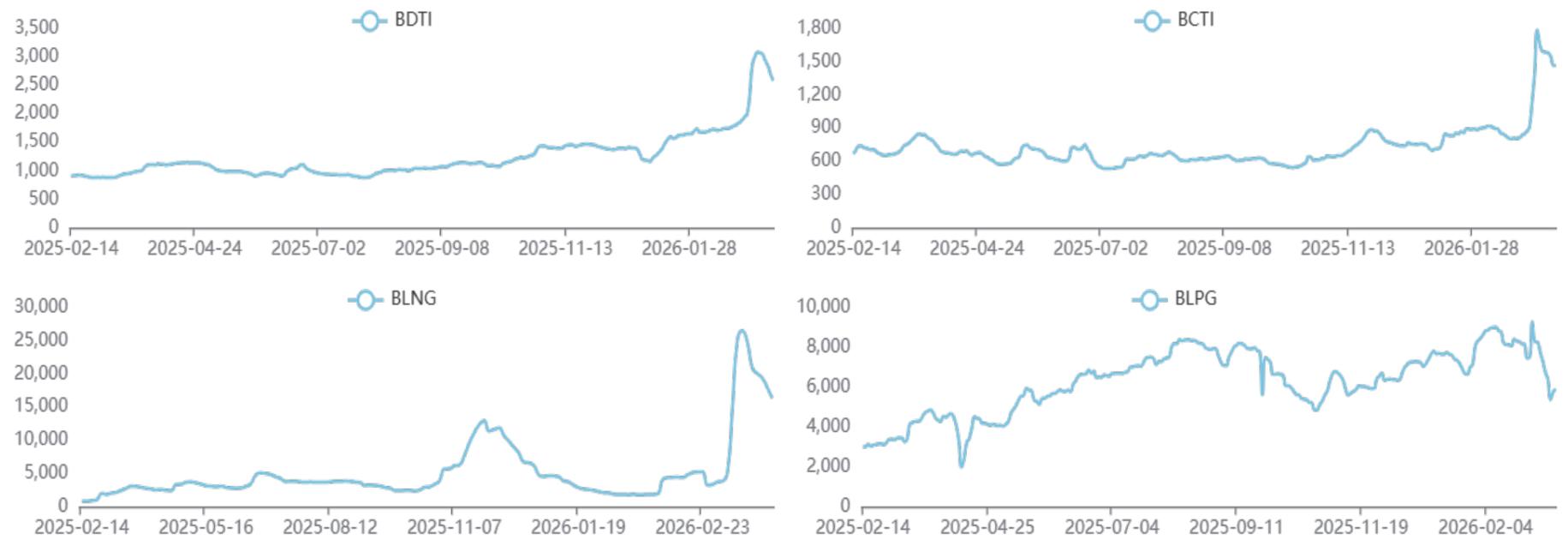
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	2028	18.0	0.9	-2.64	22.91
BCI	2880	249.0	9.46	-9.46	-0.45
BPI	1838	-124.0	-6.32	3.43	41.38
BSI	1283	-103.0	-7.43	8.18	43.35
BHSI	796	-31.0	-3.75	17.06	39.65

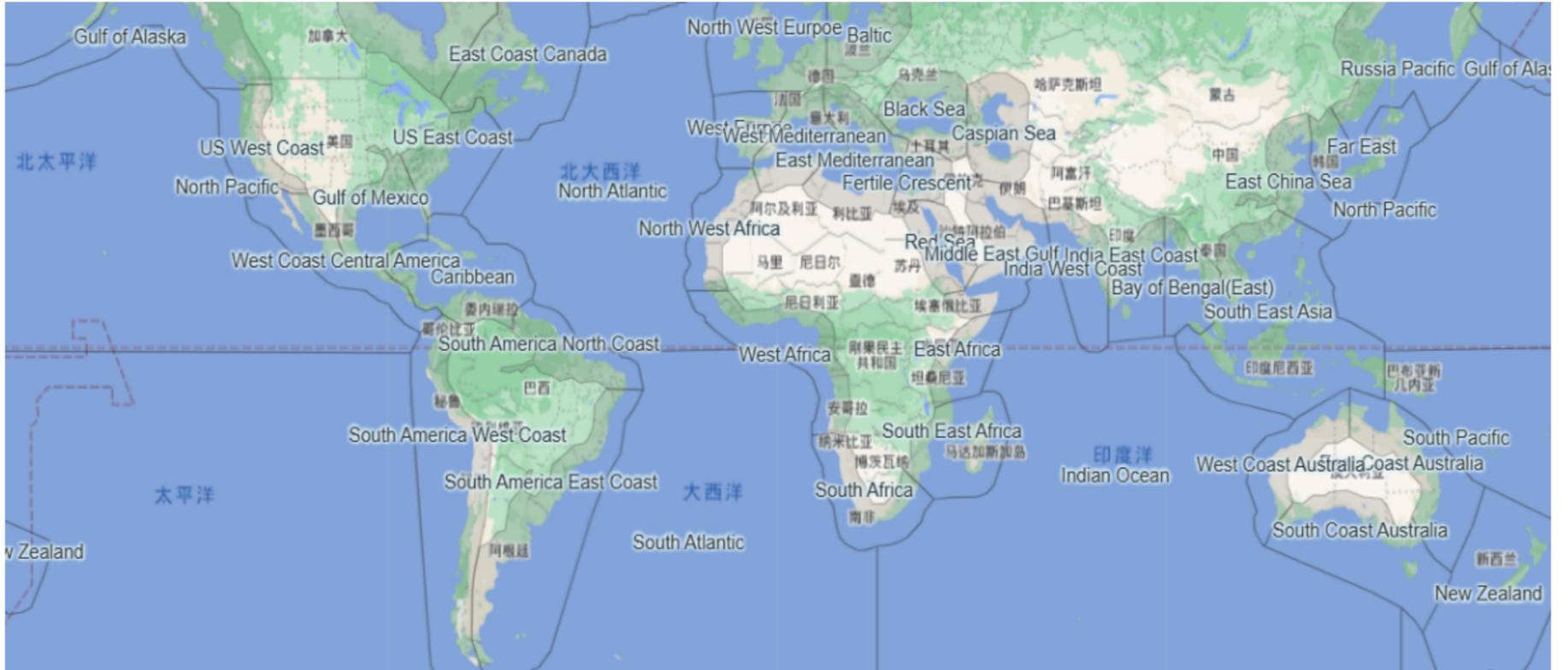


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	2586	-483.0	-15.74	50.44	180.17
BCTI	1463	-129.0	-8.1	72.93	99.05
BLNG	16333	-8400.0	-33.96	269.52	561.26
BLPG	5891	-1424.0	-19.47	-28.06	39.66



## 第四部分 运力分布 SUPPLY DISTRIBUTION

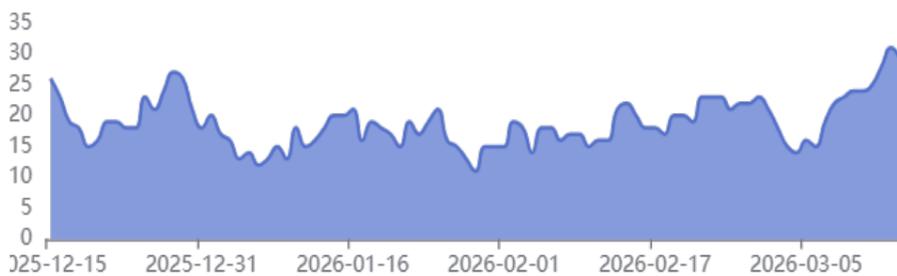


### 好望角型散货船 Capesize

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	23	24	24	25	28	31	29



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	41	40	39	42	41	41	38

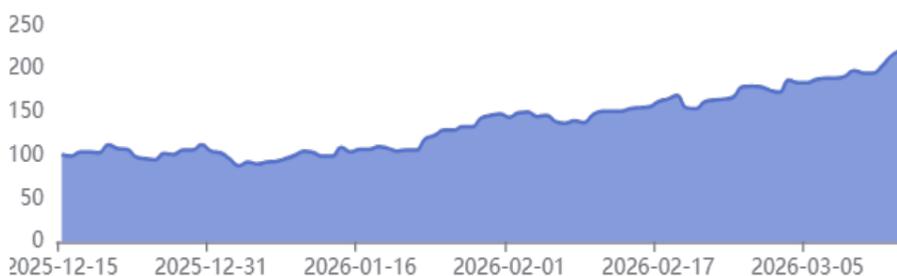


### 巴拿马型散货船 PANAMAX

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.

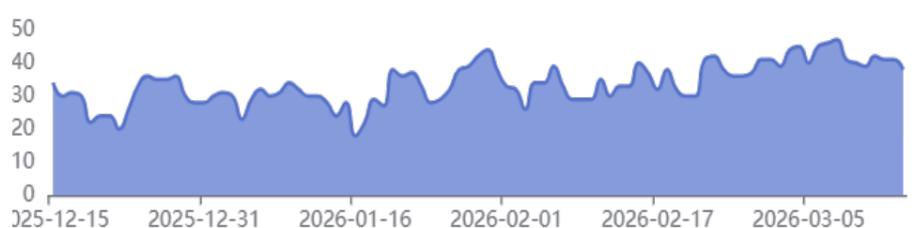
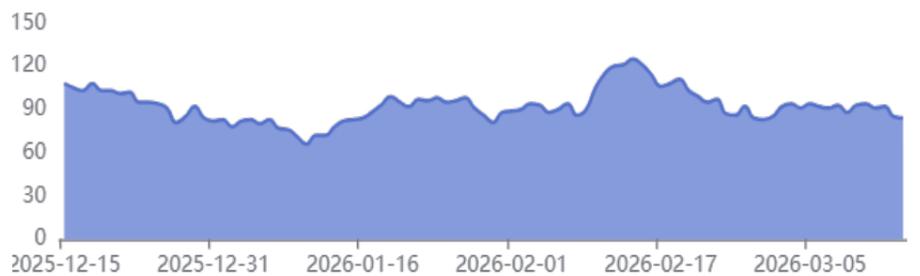
Type	M	T	W	Th	F	Sat	Sun
Pan.	191	198	195	195	203	215	221



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.

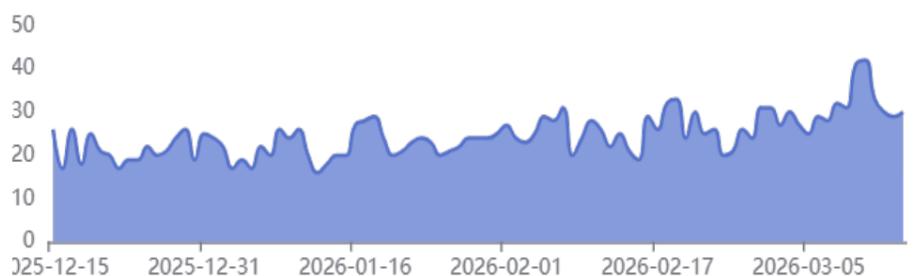
Type	M	T	W	Th	F	Sat	Sun
Cape	88	93	94	91	92	85	84



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.

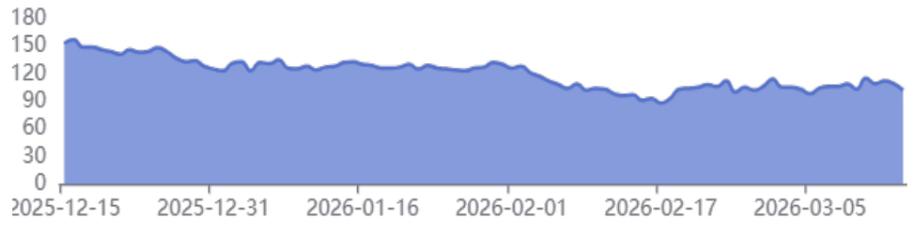
Type	M	T	W	Th	F	Sat	Sun
Pan.	18	16	14	14	16	16	15



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.	109	103	115	109	112	109	102

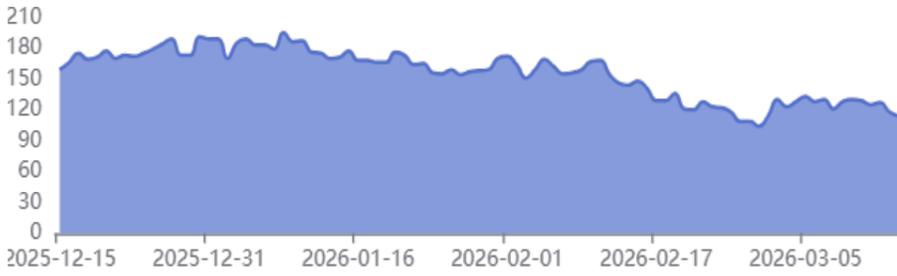


超大灵便型散货 SUPRAMAX

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.

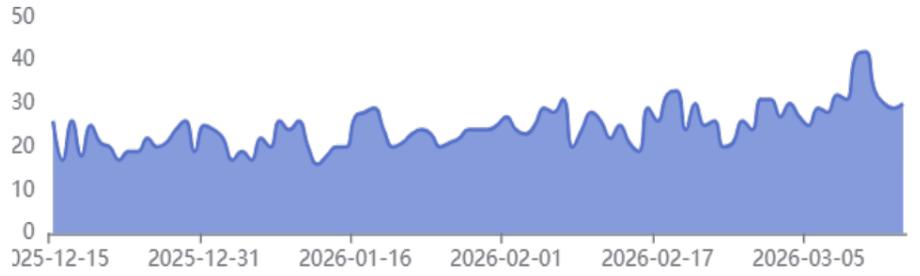
Type	M	T	W	Th	F	Sat	Sun
SMX	128	130	129	125	127	118	114



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.

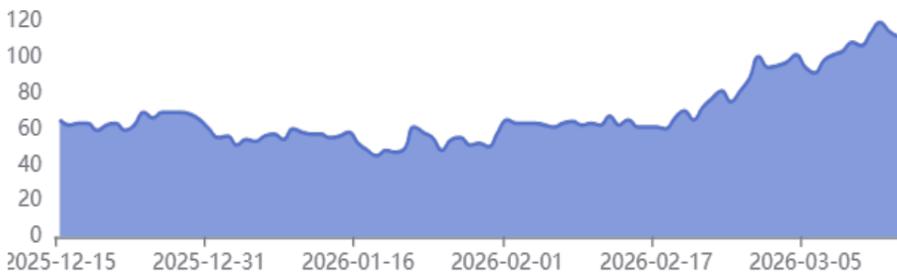
Type	M	T	W	Th	F	Sat	Sun
SMX	31	41	42	33	30	29	30



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.

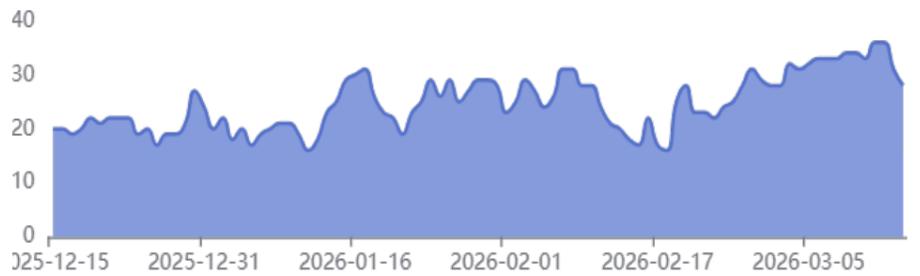
Type	M	T	W	Th	F	Sat	Sun
SMX	34	34	33	36	36	31	28



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.

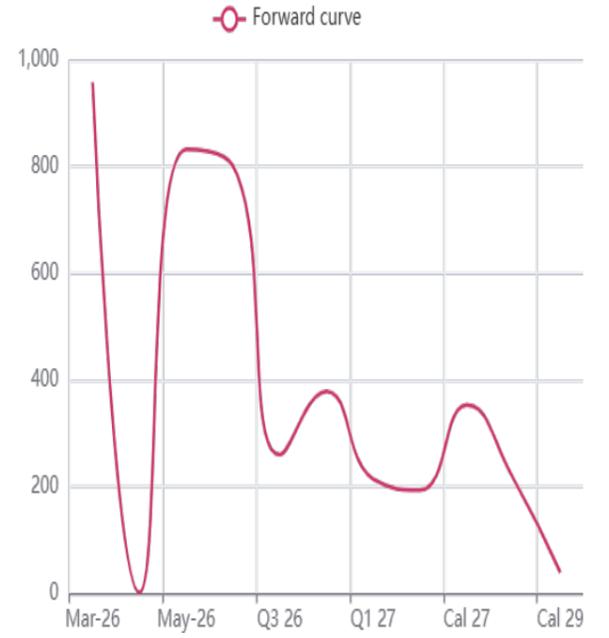
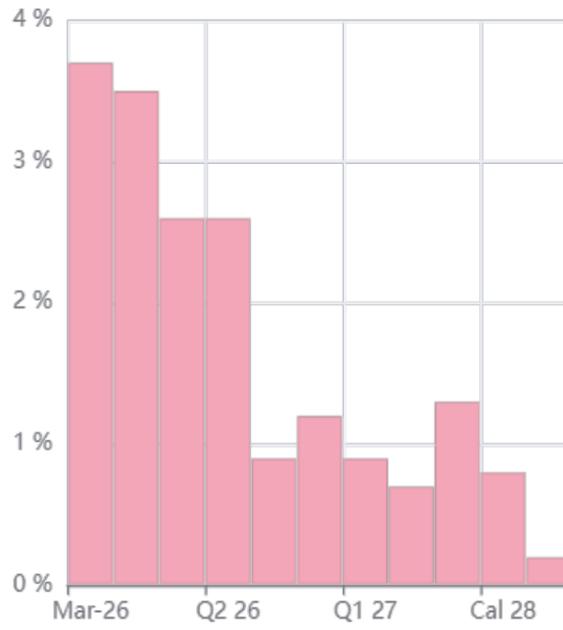
Type	M	T	W	Th	F	Sat	Sun
SMX	103	108	106	113	119	114	111



# 第五部分 远期运价协议 FFA

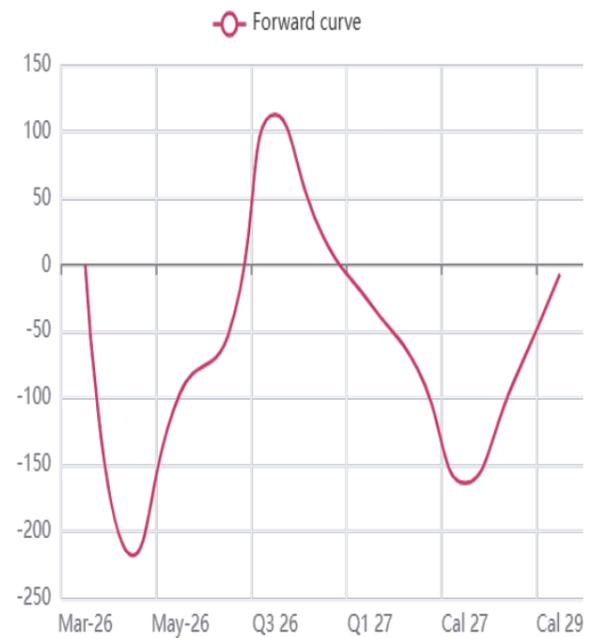
## 好望角型散货船Capesize

5TC	\$/day	WoW	
Mar-26	26,896.00	957.0	3.7 %
Apr-26	30,728.00	1043.0	3.5 %
May-26	32,253.00	832.0	2.6 %
Q2 26	31,763.67	801.0	2.6 %
Q3 26	30,679.00	259.33	0.9 %
Q4 26	30,935.00	378.0	1.2 %
Q1 27	23,153.00	214.0	0.9 %
Q2 27	27,882.00	193.0	0.7 %
Cal 27	28,166.75	352.75	1.3 %
Cal 28	25,885.00	214.0	0.8 %
Cal 29	24,828.00	39.0	0.2 %



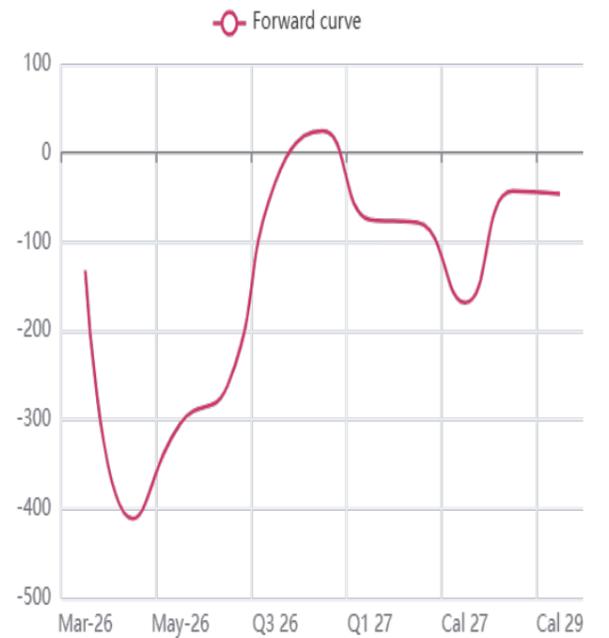
## 巴拿马型散货船Panamax

4TC	\$/day	WoW	
Mar-26	17,182.00	0.0	0.0 %
Apr-26	18,271.00	-218.0	-1.2 %
May-26	19,854.00	-96.0	-0.5 %
Q2 26	19,079.67	-53.67	-0.3 %
Q3 26	17,677.33	112.67	0.6 %
Q4 26	16,261.00	22.0	0.1 %
Q1 27	13,589.00	-29.0	-0.2 %
Q2 27	14,904.00	-78.0	-0.5 %
Cal 27	14,279.25	-163.75	-1.1 %
Cal 28	13,621.00	-90.0	-0.7 %
Cal 29	13,557.00	-7.0	-0.1 %



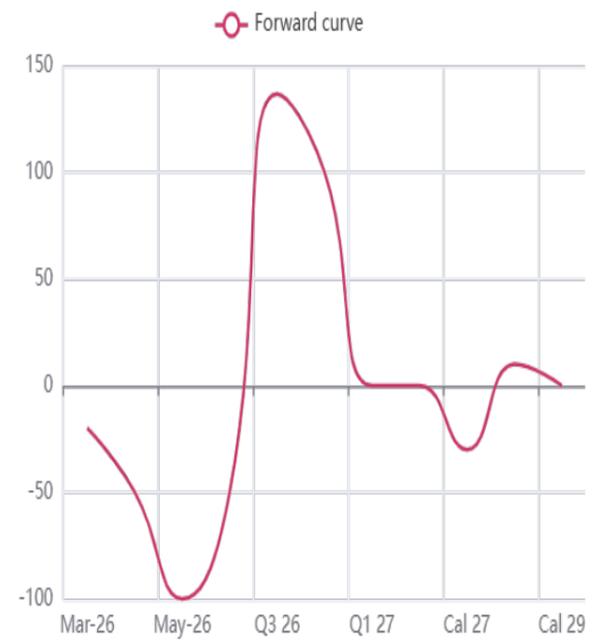
## 超大灵便型散货船Supramax

10TC	\$/day	WoW	
Mar-26	16,602.00	-132.0	-0.8 %
Apr-26	16,709.00	-411.0	-2.4 %
May-26	18,116.00	-304.0	-1.7 %
Q2 26	17,601.67	-261.0	-1.5 %
Q3 26	17,458.00	-33.33	-0.2 %
Q4 26	16,495.00	25.0	0.2 %
Q1 27	13,759.00	-75.0	-0.5 %
Q2 27	15,545.00	-78.0	-0.5 %
14,523.00	Cal 27	-168.25	-1.1 %
Cal 28	13,920.00	-43.0	-0.3 %
Cal 29	13,927.00	-46.0	-0.3 %



## 灵便型散货船Handysize

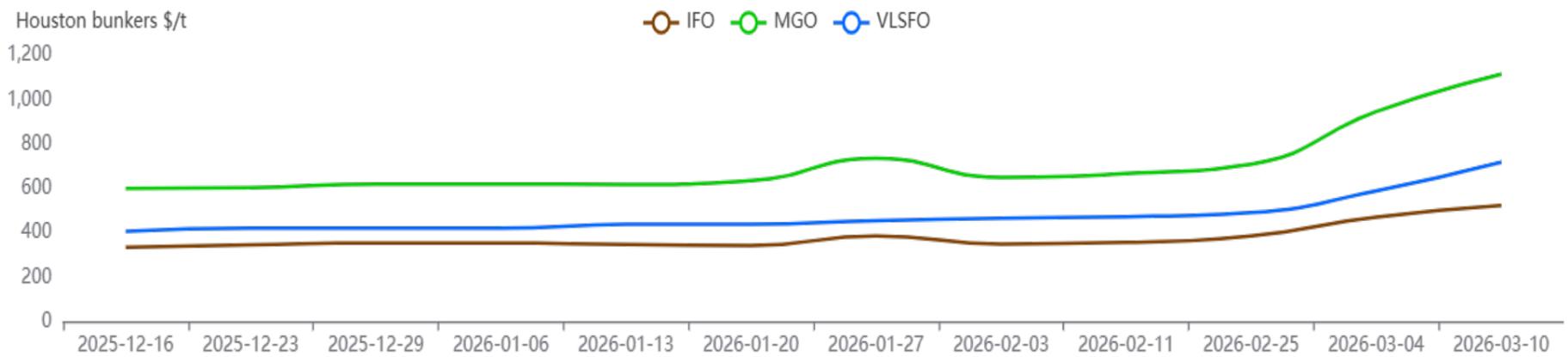
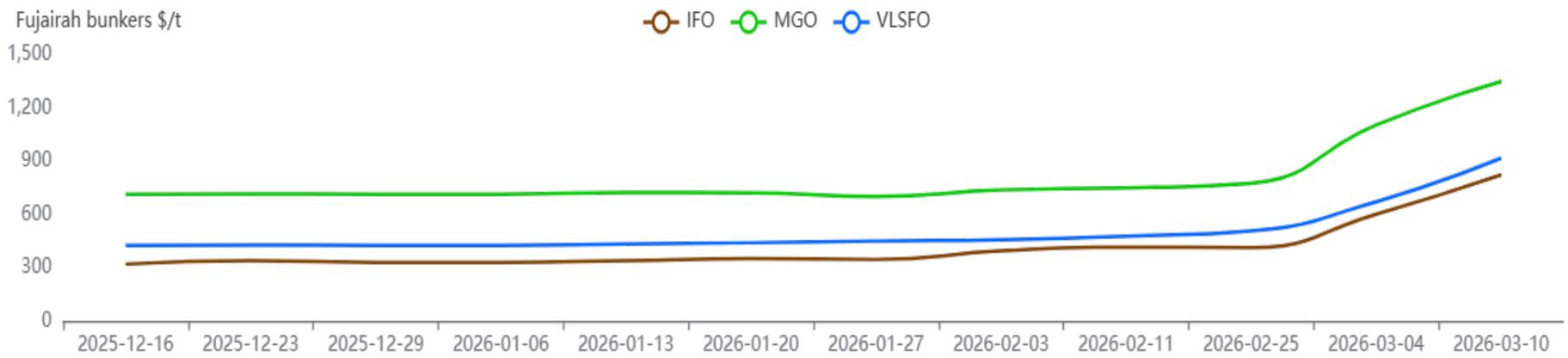
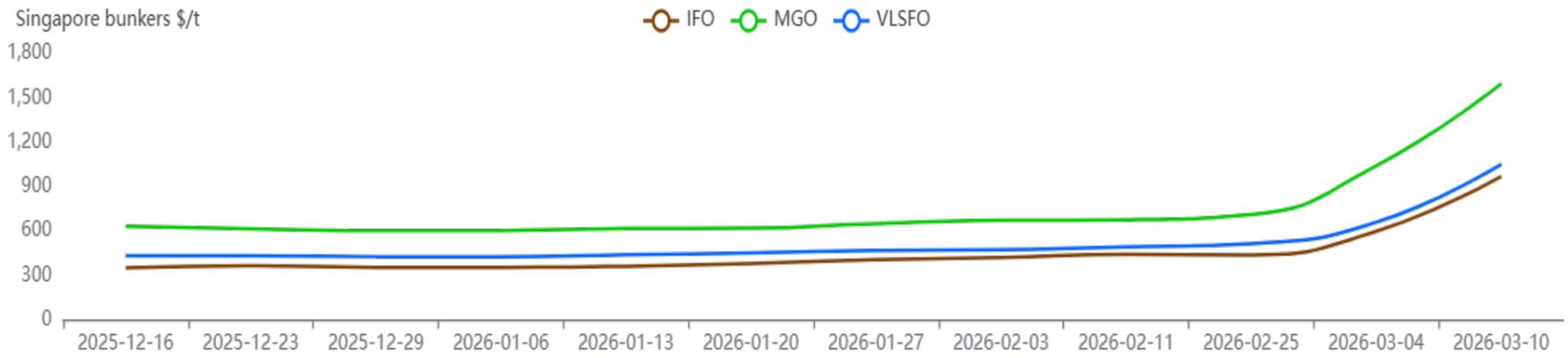
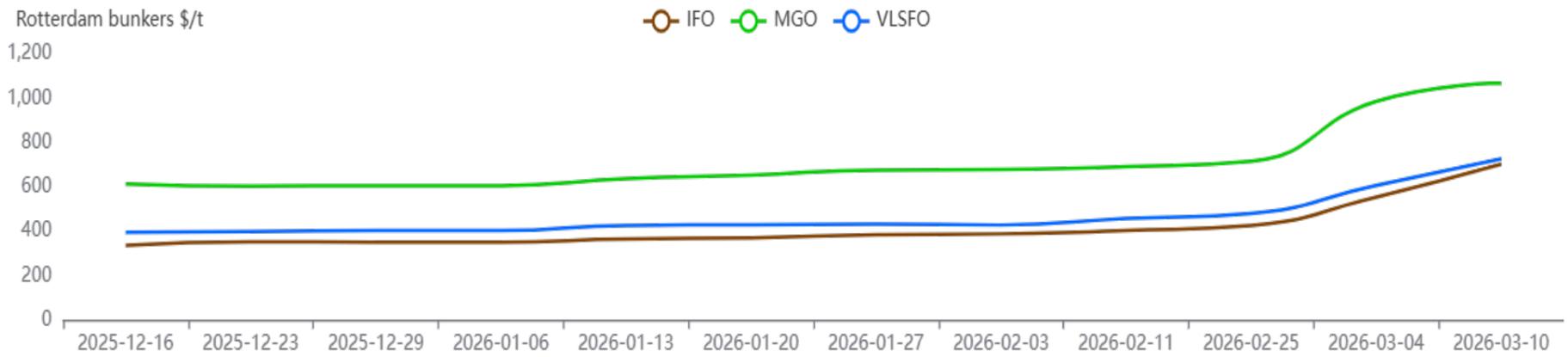
7TC	\$/day	WoW	
Mar-26	14,560.00	-20.0	-0.1 %
Apr-26	14,250.00	-50.0	-0.3 %
May-26	14,640.00	-100.0	-0.7 %
Q2 26	14,403.33	-50.0	-0.3 %
Q3 26	13,913.33	136.67	1.0 %
Q4 26	13,110.00	100.0	0.8 %
Q1 27	11,550.00	0.0	0.0 %
Q2 27	12,220.00	0.0	0.0 %
Cal 27	12,140.00	-30.0	-0.2 %
Cal 28	11,640.00	10.0	0.1 %
Cal 29	11,550.00	0.0	0.0 %



## 第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	1041.5	1009.5	1357.0	32.0	-20.0	-38.46	-31.91
Singapore	1050.5	968.5	1596.0	82.0	21.0	34.43	64.0
Rotterdam	726.0	702.0	1068.0	24.0	-29.0	-54.72	-55.56
Fujairah	918.0	824.5	1350.5	93.5	23.0	32.62	52.03
Houston	718.5	522.5	1115.0	196.0	78.0	66.1	68.97

(MP-Bunkering Main Ports; LO-Heavy Low Sulphur Fuel Oil; HO-Heavy High 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		208.0	6.0	2.97	5.58	4.52
Maize		231.0	3.0	1.32	1.32	-0.86
Soybeans		230.0	5.0	2.22	3.14	12.75
Rice		157.0	0.0	0.0	-1.88	-13.26
Barley		246.0	5.0	2.07	2.07	5.13
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	87.62	13.06	17.52	39.32	32.66
Brent	USD/Bbl	91.13	9.76	11.99	34.51	31.39
Natural Gas	USD/MMBtu	3.06	0.14	4.79	-5.56	-32.0
Gasoline	USD/Gal	2.68	0.18	7.2	40.31	28.23
Heating Oil	USD/Gal	3.49	0.25	7.72	46.64	60.09
Ethanol	USD/Gal	1.86	0.06	3.33	10.71	9.41
Naphtha	USD/T	779.24	109.36	16.33	42.85	29.76
Propane	USD/Gal	0.77	0.03	4.05	22.22	-8.33
Uranium	USD/Lbs	85.9	-0.3	-0.35	-4.02	33.39
Methanol	CNY/T	2500.0	-46.0	-1.81	15.79	-5.66
TTF Gas	EUR/MWh	49.35	-0.17	-0.34	52.46	19.12
UK Gas	GBP/thm	126.36	-0.14	-0.11	65.33	24.42
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	5.9	0.04	0.68	1.72	27.16
Coal	USD/T	143.8	5.8	4.2	23.86	37.48
Steel	CNY/T	3104.0	20.0	0.65	1.57	-3.6
Iron Ore	USD/T	102.9	3.33	3.34	3.25	1.89
Aluminum	USD/T	3327.5	-12.5	-0.37	7.49	23.7
Lithium	CNY/T	158500.0	4500.0	2.92	10.26	111.62
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	5184.78	37.41	0.73	2.79	78.87
Silver	USD/t.oz	89.35	5.68	6.79	15.44	177.4
Platium	null	2241.5	82.4	3.82	7.91	134.25
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.17	0.01	0.86	-1.68	7.34
USD/CNY		6.88	-0.01	-0.15	-0.29	-4.97

## 第八部分 本周话题 WEEKLY TOPIC



### 载有伊朗原油油轮驶离波斯湾

根据HIFLEET航运大数据显示，数艘油轮与液化气运输船已从伊朗港口驶离中东波斯湾，她们顺利通过霍尔木兹海峡，而自2月28日美以对伊发动袭击后，至少五艘载有伊朗原油运输船已穿越受管控的霍尔木兹海峡。

市场上已有传言称，伊朗计划派遣海军舰艇组成护航编队，护送船舶驶离波斯湾。反伊朗核问题组织“United Against Nuclear Iran”表示，2月28日至3月期间，涉事原油油轮均在哈尔克岛码头完成装油作业。

为弥补波斯湾地区油气供应的缺口，主要石油出口国沙特阿拉伯正加大红海航线的石油运输量，但目前的运输规模仍远不足以填补该区域的油气损失。根据市场估算，波斯湾地区的油气损失已超1亿桶。

霍尔木兹海峡附近目前仍有数百艘船舶滞留，沙特国家石油公司（阿美石油，Aramco）已通知部分买家，改至红海沿岸的延布港进行装货。该码头的超大型油轮（VLCC）日租金创下新高，最高可达77万美元。

伦敦证券交易所集团（LSEG）的数据显示，3月前五日，延布港的石油装载量达到每日190万桶，较2月水平增长约60%。贸易商表示，延布港的石油处理能力可达每日450万桶，但此前日常装

载量鲜有超过250万桶的情况。据HIFLEET船运数据分析显示，已有超10艘油轮确定将停靠延布港。

联合国贸易和发展会议（UNCTAD，下称联合国贸发会议）就中东冲突持续发酵对全球经济造成的冲击发出警示，称霍尔木兹海峡若持续处于实际封闭状态，航运出口受阻的情况将引发全球性的广泛社会经济连锁反应，其影响程度将取决于地区紧张局势的持续时间、激烈程度以及地理波及范围。

当前经由霍尔木兹海峡的船舶通行量，较冲突前日均129艘的水平暴跌97%。这一状况已直接引发全球能源市场剧烈波动，天然气价格暴涨74%，原油价格也攀升27%。

霍尔木兹海峡在全球化肥贸易中同样占据核心地位，2024年经该海峡出口的化肥总量达1600万吨，占全球化肥贸易量的三分之一。其中，海湾地区出口的化肥中，尿素占比高达67%，而尿素价格与天然气价格直接挂钩，能源价格的飙升也将传导至化肥产业。

联合国贸发会议对此发出严重警告，海峡封闭导致的出口限制将大幅削减全球化肥的可获取性，发展中国家受此影响尤为显著。该机构还指出，过往经验已充分证明，食品和化肥价格与油气价格存在直接关联，此前中东地区局部冲突、新冠疫情以及俄乌冲突期间，均出现过油气、食品和化肥价格同步飙升的情况。

整体而言，此次霍尔木兹海峡通行受阻引发的系列连锁反应，将对发展中国家造成更为严重的社会经济冲击，运费上涨与各类商品价格攀升带来的压力，会在这些国家体现得尤为突出。

According to the shipping big data of HIFLEET, several oil tankers and liquefied gas carriers have left Iranian ports and sailed into the Persian Gulf in the Middle East. They successfully passed through the Hormuz Strait. Since the US and Israel launched attacks on Iran on February 28th, at least five oil tankers carrying Iranian crude oil have crossed the controlled Hormuz Strait.

There are already rumors in the market suggesting that Iran plans to send naval vessels to form a convoy to escort ships out of the Persian Gulf. The anti-Iran nuclear issue organization "United Against Nuclear Iran" stated that from February 28th to March, the involved oil tankers completed their oil loading operations at the Harq Island terminal.

To make up for the shortage of oil and gas supply in the Persian Gulf region, the major oil-exporting country Saudi Arabia is increasing the volume of oil transportation via the Red Sea route. However, the current transportation scale is still far from sufficient to fill the oil and gas loss in the region. According to market estimates, the oil and gas loss in the Persian Gulf region has exceeded 100 million barrels.

Currently, hundreds of ships are still stranded near the Strait of Hormuz. The Saudi National Oil Company (Aramco) has informed some buyers to transfer to the Yanbu Port on the Red Sea coast for loading. The daily rental rate for the very large crude carriers (VLCC) at this port has reached a new high, reaching up to 770,000 US dollars.

According to data from the London Stock Exchange Group (LSEG), in the first five days of March, the oil loading volume at Yanbu Port reached 1.9 million barrels per day, an increase of approximately 60% compared to the level in February. Traders said that the oil processing capacity of Yanbu Port can reach 4.5 million barrels per day, but previously the daily loading volume rarely exceeded 2.5 million barrels. According to HIFLEET shipping data analysis, more than 10 oil tankers have confirmed that they will dock at Yanbu Port.

The United Nations Conference on Trade and Development (UNCTAD, hereinafter referred to as the UNCTAD) has issued a warning regarding the impact of the ongoing conflict in the Middle East on the global economy. It states that if the Strait of Hormuz remains in a state of actual closure, the obstruction of shipping and exports will trigger a widespread and global social and economic chain reaction. The extent of its impact will depend on the duration, intensity and geographical reach of the regional tensions.

The current volume of ships passing through the Strait of Hormuz has plummeted by 97% compared to the daily average of 129 ships before the conflict. This situation has directly led to severe fluctuations in the global energy market, with the price of natural gas soaring by 74% and the price of crude oil rising by 27%.

The Strait of Hormuz also holds a central position in global fertilizer trade. In 2024, the total amount of fertilizers exported through this strait reached 16 million tons, accounting for one-third of the global fertilizer trade volume. Among the fertilizers exported from the Gulf region, urea accounted for as high as 67%. The price of urea is directly linked to the price of natural gas, and the soaring energy prices will also be transmitted to the fertilizer industry.

The United Nations Conference on Trade and Development has issued a stern warning on this matter. The export restrictions caused by the closure of the strait will significantly reduce the accessibility of global fertilizers, and developing countries will be particularly affected by this. The agency also pointed out that past experience has fully demonstrated that there is a direct correlation between food and fertilizer prices and oil and gas prices. During previous periods of local conflicts in the Middle East, the COVID-19 pandemic, and the Russia-Ukraine conflict, there were simultaneous surges in oil, food, and fertilizer prices.

Overall, the series of chain reactions triggered by the disruption of passage through the Strait of Hormuz will cause more severe social and economic impacts on developing countries. The pressure brought about by rising freight costs and the increase in prices of various goods will be particularly prominent in these countries.

