



# 2026年 第19周市场周报

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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

Chartering AI Vessel | Cargo

Public | Private

Port | Vessel

enter the open port name

Search | Reset | Total 32

Filter: Type Length Draft DWT Capacity Age OPEN Date OPEN Area OPEN Type

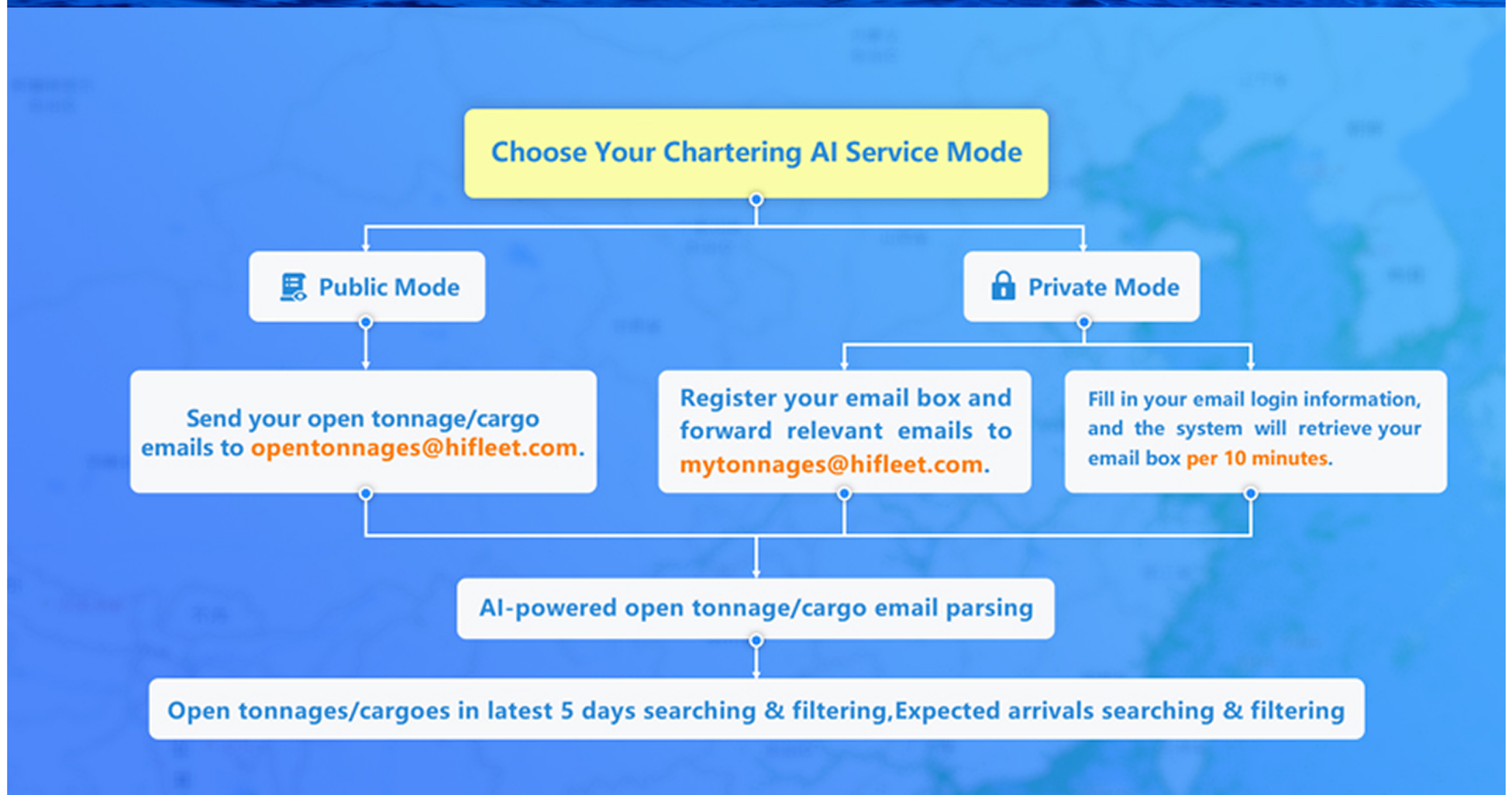
| Ship Name | DWT   | Age | Sender | Received Time    | Open   | OPEN Date  | OPEN Location    | Voyage Intend     | Destination    | ETA        | Duration (day) | Tags                                      |
|-----------|-------|-----|--------|------------------|--------|------------|------------------|-------------------|----------------|------------|----------------|---|
| *****     | 57802 | 15  |        | 2025-10-15 14:49 |        | 2025-10-18 | DAMMAN           | SGP/PN            | KIA DAMM...    | 2025-09-26 | -22            | Gearless                                  |
| *****     | 63342 | 6   |        | 2025-10-15 14:49 |        | 2025-10-23 | KHALIFA          | SGP/PN            | Fujairah       | 2025-10-18 | -5             | Gearless Ecn DG Approval                  |
| *****     | 56920 | 14  | Owner  | 2025-10-15 14:10 | spot   | 2025-10-26 | SHUWARH          | Middle East Ja... | Dammam         | 2025-09-11 | -45            | Gearless                                  |
| *****     | 63850 | 0   | Owner  | 2025-10-15 14:10 | spot   | 2025-10-31 | DAMMAM           | Middle East Ja... | Umm Qasr       | 2025-10-12 | -19            | Gearless                                  |
| *****     | 64050 | 5   |        | 2025-10-15 11:28 |        | 2025-10-16 | CHITTAGONG       |                   | Chittagong     | 2025-10-02 | -14            | Gearless DG Approval                      |
| *****     | 56745 | 16  |        | 2025-10-14 16:42 | TCT    | 2025-10-22 | FANGCHENG        |                   | CHINA          | -          | -              | Gearless Ecn                              |
| *****     | 63522 | 0   |        | 2025-10-14 15:04 |        | 2025-10-16 | RIO HANNA        |                   | Shidao         | 2025-09-28 | -10            | Gearless Ecn                              |
| *****     | 10701 | 13  |        | 2025-10-14 15:04 | spot   | 2025-11-14 | CEBU PHILIP...   | CEBU PHILIP...    | -              | -          | -              | Gearless Ecn DG Approval                  |
| *****     | 43125 | 30  | Owner  | 2025-10-14 11:29 |        | 2025-10-26 | NANTONG          | MIDDLE EAST...    | Tokai Ayer     | 2025-10-05 | -21            | Gearless Ecn                              |
| *****     | 63850 | 0   | Owner  | 2025-10-14 09:17 | period | 2025-10-20 | YANGZHOU S...    |                   | Yisheng        | 2025-09-29 | -21            | Gearless Ecn                              |
| *****     | 33379 | 12  |        | 2025-10-13 16:26 | spot   | 2025-12-03 | ABDIANLO         | WW EXCL GGA       | Kakinada       | 2025-10-09 | -55            | Gearless                                  |
| *****     | 64726 | 1   |        | 2025-10-13 14:41 | spot   | 2025-10-21 | Yangjiang S.C... | Yangjiang S.C...  | -              | -          | -              | Gearless Ecn DG Approval                  |
| *****     | 56039 | 18  |        | 2025-10-13 14:21 | spot   | 2025-10-18 | KING ABDULL...   | RUSSIA/UKR...     | King Abdull... | 2025-10-05 | -13            | Gearless                                  |
| *****     | 57809 | 14  |        | 2025-10-13 14:21 | spot   | 2025-10-19 | PUTTALAM         | N.DORE/GGA        | PUTTALAM ...   | 2025-10-15 | -4             | Gearless                                  |
| *****     | 78784 | 20  |        | 2025-10-13 14:21 | spot   | 2025-10-19 | KEMANMAN ...     |                   | Kuantan        | 2025-10-14 | -5             | Gearless                                  |
| *****     | 58705 | 13  | Owner  | 2025-10-13 09:22 | period | 2025-10-23 | WEIHAI SHIPY...  |                   | Wei Hai        | 2025-10-05 | -18            | Ecn                                       |
| *****     | 72541 | 14  |        | 2025-10-13 08:46 | spot   | 2025-10-17 | HALDIA, INDIA    |                   | -              | -          | -              | Gearless Ecn                              |
| *****     | 76784 | 20  |        | 2025-10-11 15:27 |        | 2025-10-21 | KEMANMAN ...     |                   | Kuantan        | 2025-10-14 | -7             | Gearless                                  |
| *****     | 50815 |     |        | 2025-09-28 15:52 |        | 2025-10-10 | XINGANG          | DAMM              | -              | -          | -              | Gearless Box Hold Ocean Fitted CRABS-Full |
| *****     | 38340 |     |        | 2025-09-28 15:52 |        | 2025-10-31 | XINGANG / LL...  | DIBOUTI / IED...  | Bunati Port    | 2025-10-17 | -14            | Gearless                                  |

Basic authenticity screening for tonnage offers

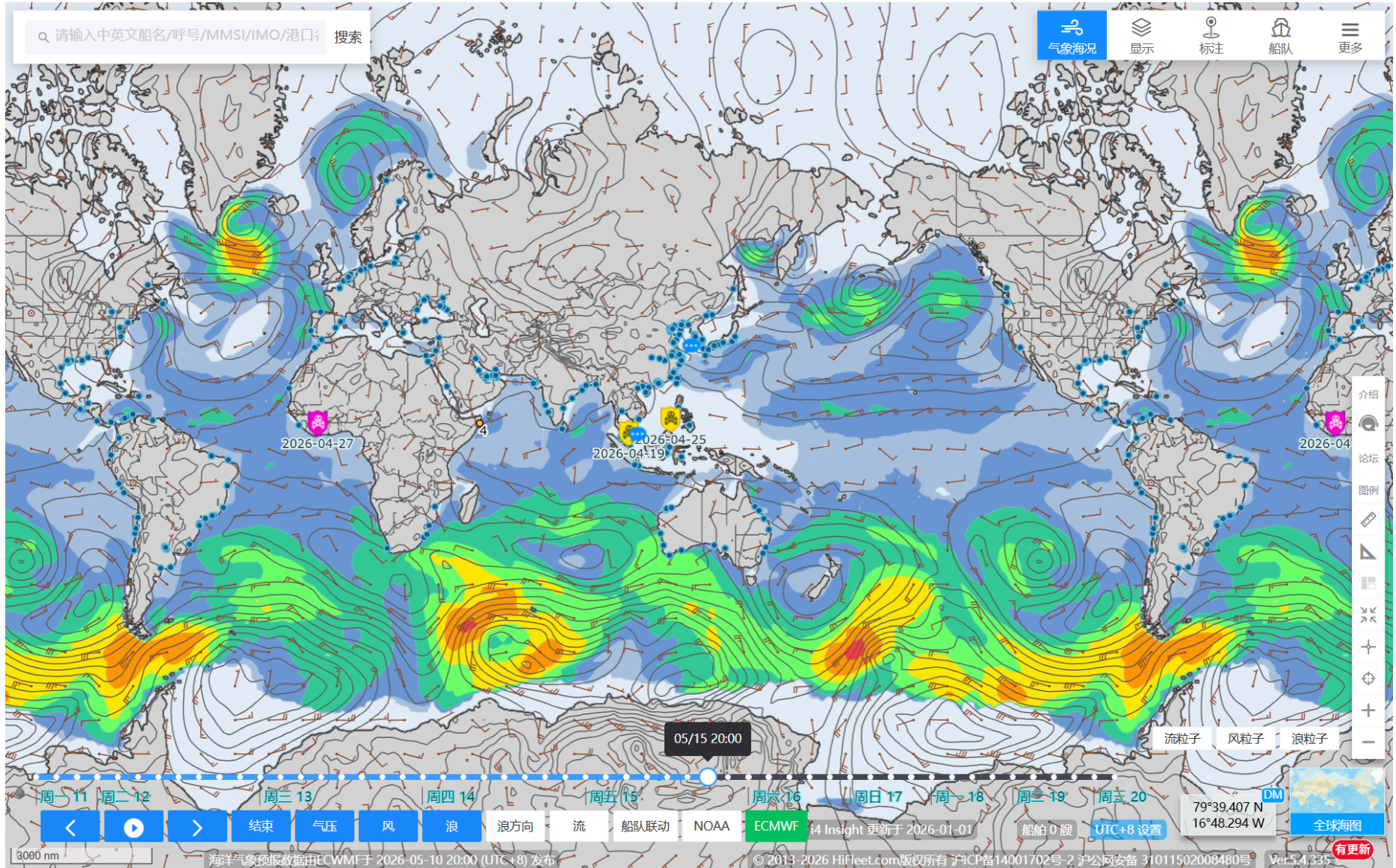
Sanctions-risk alerts for tonnage offers

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1496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 1496 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3-5级，有中浪；黄海风力3-4级，轻浪；东海风力3-4级，有中浪；台湾海峡3-5级风，周末有中浪；南海大部海域风力3-4级，有中浪。The coming week the wind in Bohai Sea is moderate with moderate sea. Yellow Sea the wind is moderate with slight sea. And China East Sea is moderate with moderate sea. The wind in the Taiwan Strait becomes strong with moderate sea in the late of the week. In most of the South China Sea the wind is moderate with moderate sea.

## 海盗事件 Piracy

2026年5月2日，在也门沙布瓦的卡纳港码头以南约 12 公里处。九名武装人员登上一艘停泊中的油轮，劫持并扣押了船员。据报告，该油轮正驶向索马里海岸。当地和国际有关部门正在进行调查。02.05.2026: 0500 UTC: Posn: 13:49N - 048:28E, Around 12nm South of Qana Port Terminal, Shabwa, Yemen. Nine-armed persons boarded, hijacked, and took hostage the crew on an anchored tanker. Reports indicate the tanker to be heading towards the Somali Coast. Local and international Authorities are investigating.

## 海上事件 Marine Incidents

2026年5月8日周五，美军对两艘大型伊朗原油运输船发动了攻击，以阻止它们返航，并进一步加强了对伊朗海上贸易的封锁。On Friday, May 8, 2026, the US military launched an attack on two large Iranian oil transport ships in an attempt to prevent them from returning and to further strengthen the blockade of Iran's maritime trade.

## 其它 Others

没有 Nil

## 备注 Remark

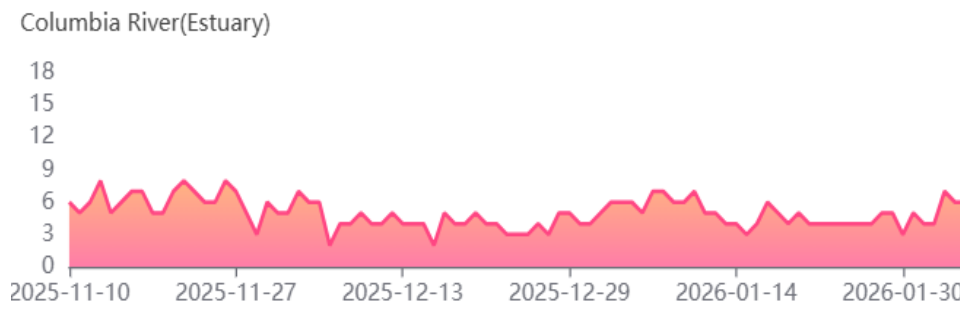
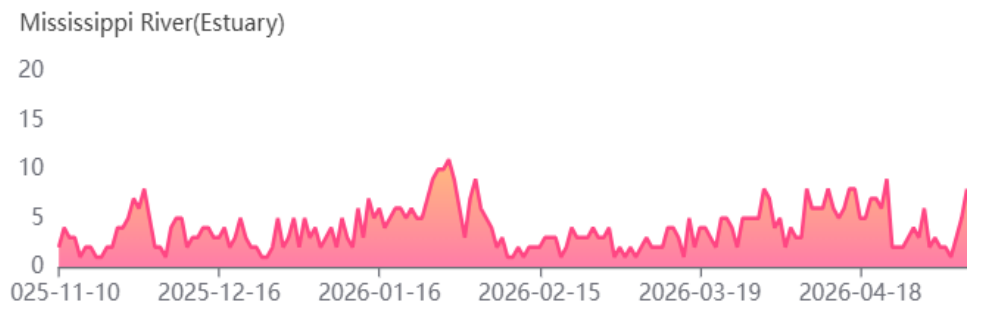
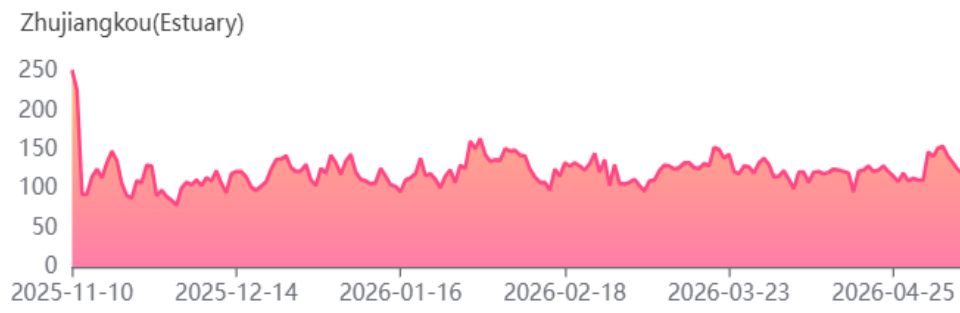
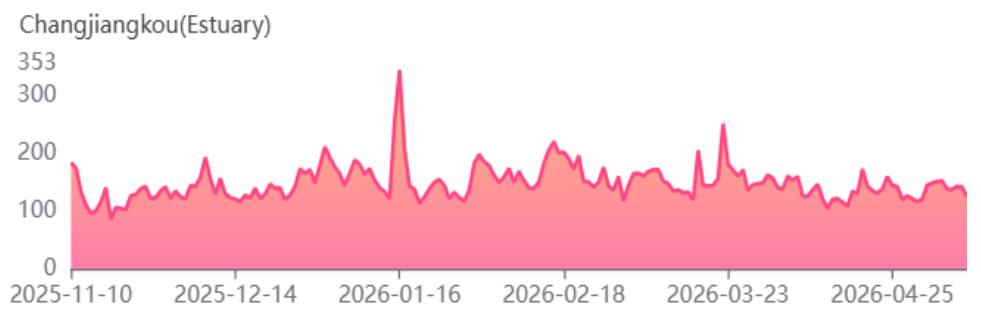
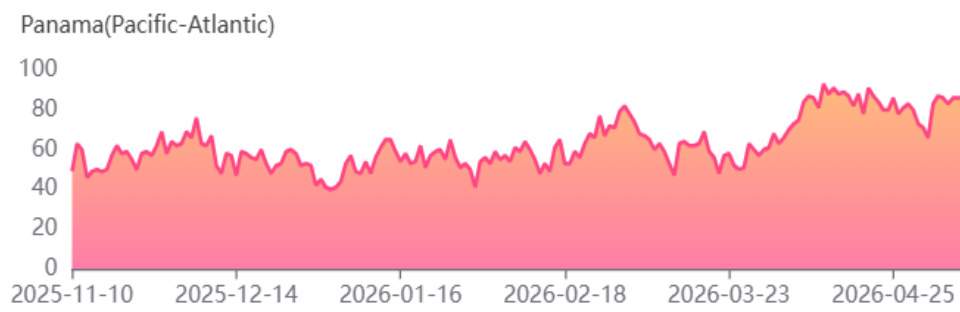
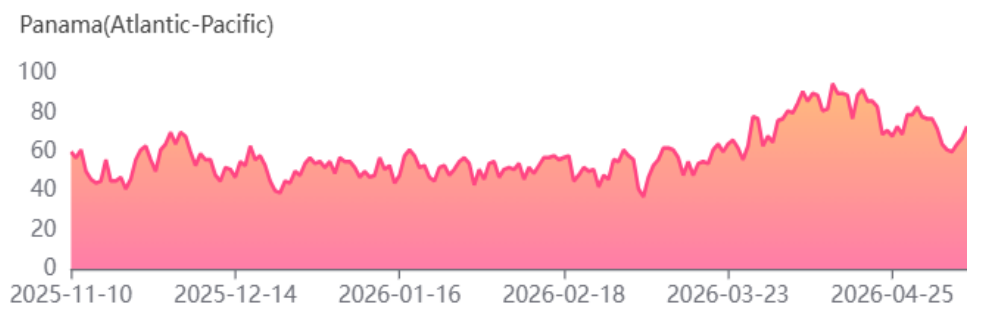
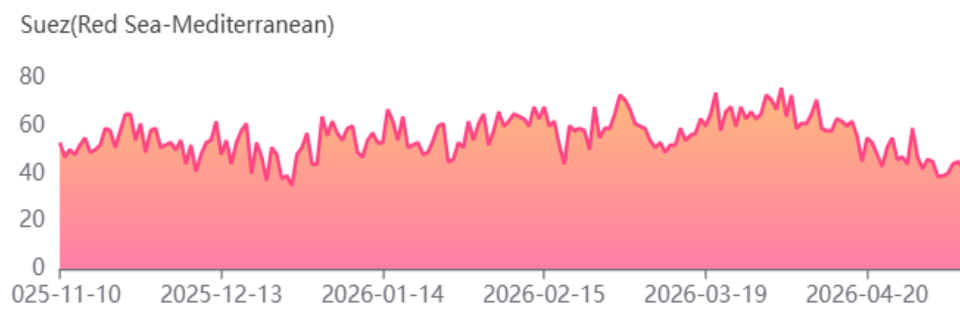
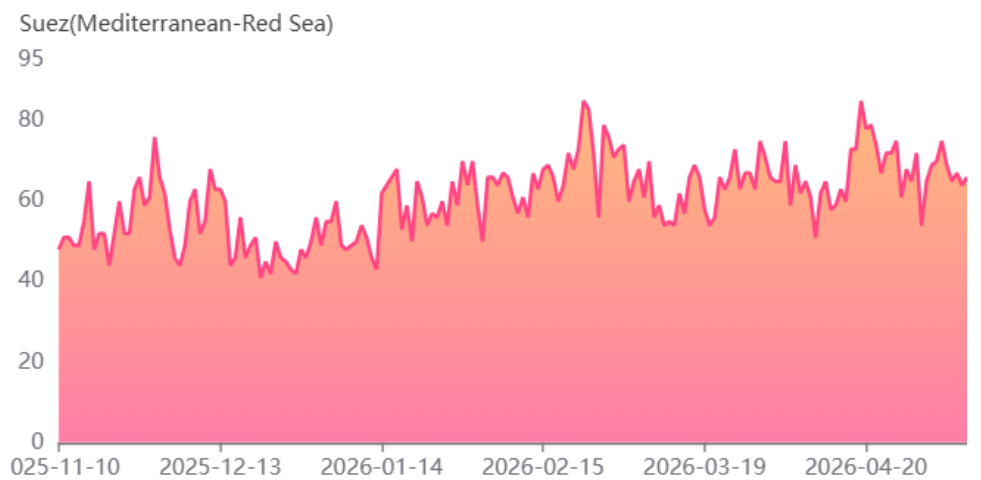
本报告数据截止时间为2026年5月10日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on May 10th of 2026; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

## 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   | 41   | 1436 | -40 | -428 |
| Miss.Riv.  | 8    | 128  | -4  | -2   |
| CJK        | 125  | 3875 | 96  | -500 |
| Pa.Atlan.  | 73   | 2243 | -77 | 212  |
| Colum.Riv. | 7    | 196  | 4   | 48   |
| Suez.Med.  | 66   | 1983 | 16  | 118  |
| Pa.Pac.    | 82   | 2410 | 64  | 488  |
| ZJK        | 92   | 3574 | 95  | -79  |

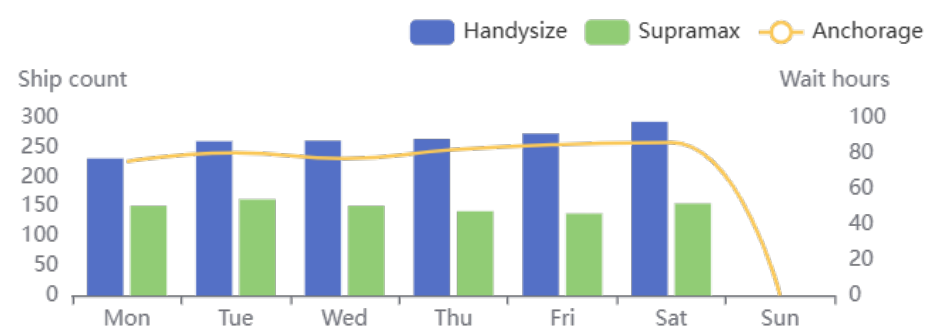


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

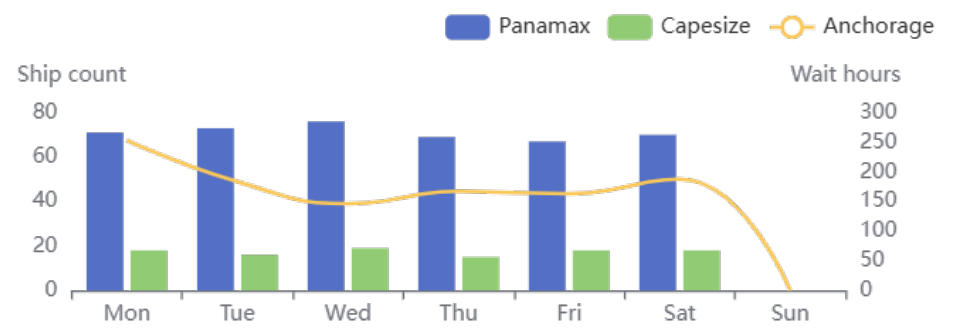
| Type  | M    | T    | W    | Th  | F    | Sat | Sun |
|-------|------|------|------|-----|------|-----|-----|
| HDY   | 231  | 260  | 261  | 264 | 273  | 293 | 0   |
| SMX   | 151  | 162  | 151  | 142 | 138  | 155 | 0   |
| WT.h. | 75.3 | 80.2 | 77.0 | 82  | 84.9 | 86  | 0.0 |



## 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

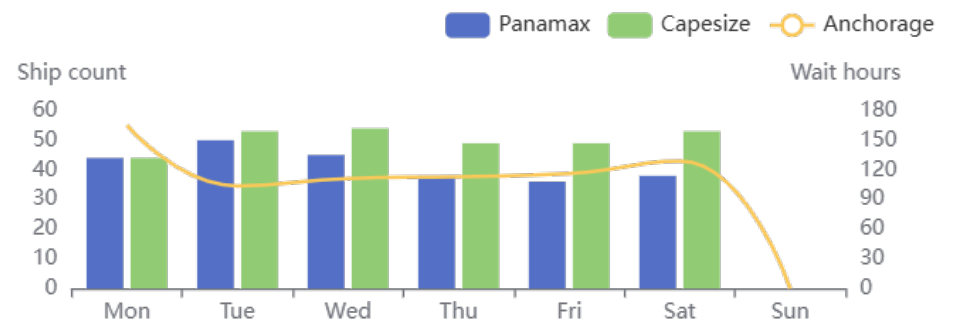
| Type  | M     | T     | W     | Th    | F     | Sat | Sun |
|-------|-------|-------|-------|-------|-------|-----|-----|
| Pan.  | 71    | 73    | 76    | 69    | 67    | 70  | 0   |
| Cap   | 18    | 16    | 19    | 15    | 18    | 18  | 0   |
| WT.h. | 253.4 | 183.6 | 146.3 | 167.2 | 163.2 | 188 | 0.0 |



## 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

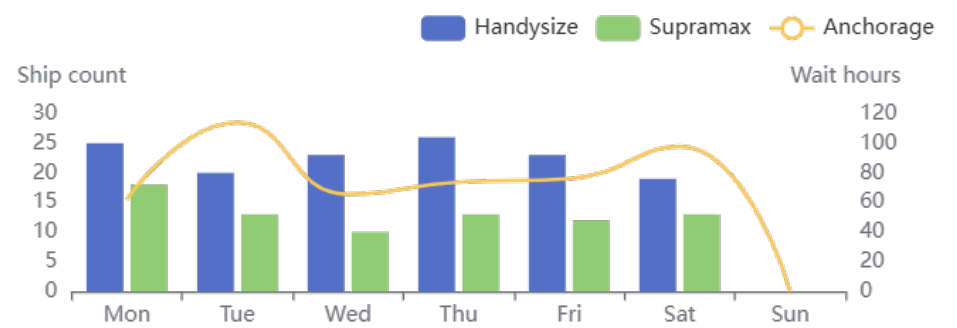
| Type  | M     | T     | W     | Th    | F     | Sat | Sun |
|-------|-------|-------|-------|-------|-------|-----|-----|
| Pan.  | 44    | 50    | 45    | 38    | 36    | 38  | 0   |
| Cap   | 44    | 53    | 54    | 49    | 49    | 53  | 0   |
| WT.h. | 165.3 | 103.8 | 111.4 | 113.2 | 116.4 | 129 | 0.0 |



## 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

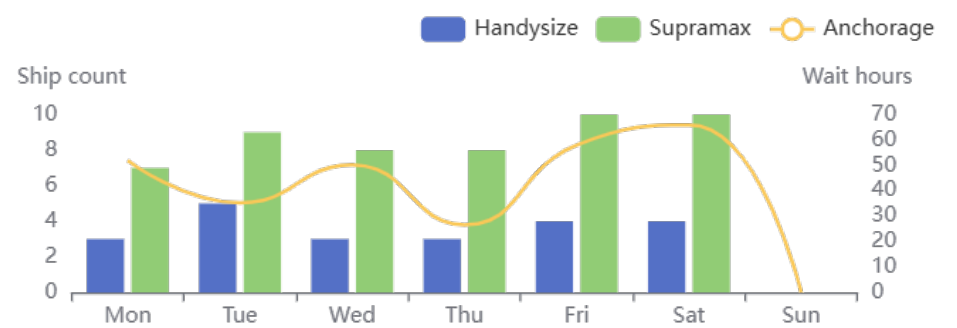
| Type  | M    | T     | W    | Th   | F    | Sat | Sun |
|-------|------|-------|------|------|------|-----|-----|
| HDY   | 25   | 20    | 23   | 26   | 23   | 19  | 0   |
| SMX   | 18   | 13    | 10   | 13   | 12   | 13  | 0   |
| WT.h. | 62.3 | 114.1 | 65.6 | 73.8 | 76.1 | 98  | 0.0 |



## 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

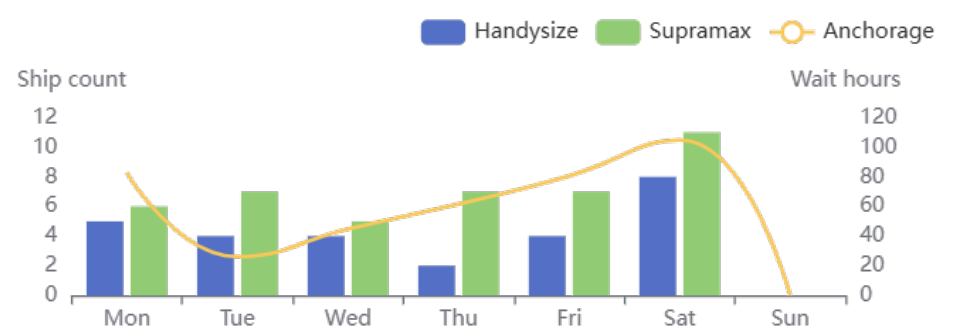
| Type  | M    | T     | W    | Th   | F     | Sat | Sun |
|-------|------|-------|------|------|-------|-----|-----|
| HDY   | 3    | 5     | 3    | 3    | 4     | 4   | 0   |
| SMX   | 7    | 9     | 8    | 8    | 10    | 10  | 0   |
| WT.h. | 51.9 | 35.25 | 50.2 | 26.6 | 58.05 | 66  | 0.0 |



## 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

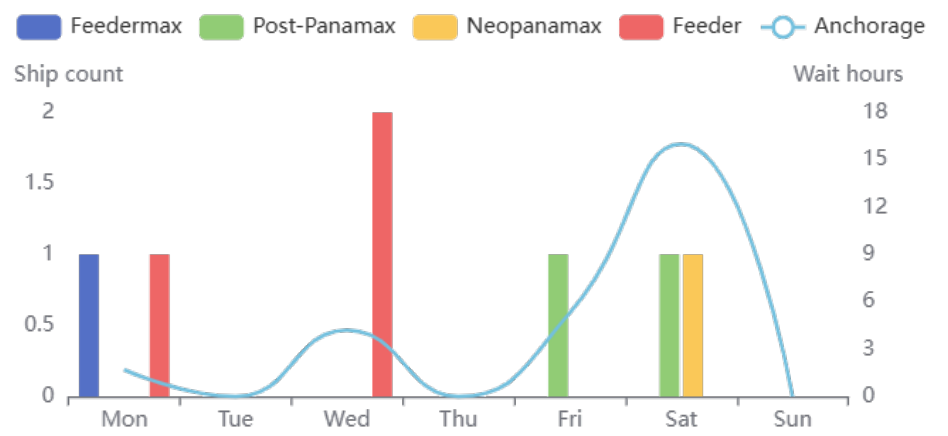
| Type  | M    | T    | W    | Th   | F    | Sat | Sun |
|-------|------|------|------|------|------|-----|-----|
| HDY   | 5    | 4    | 4    | 2    | 4    | 8   | 0   |
| SMX   | 6    | 7    | 5    | 7    | 7    | 11  | 0   |
| WT.h. | 82.7 | 26.2 | 44.8 | 61.6 | 80.7 | 105 | 0.0 |



## 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

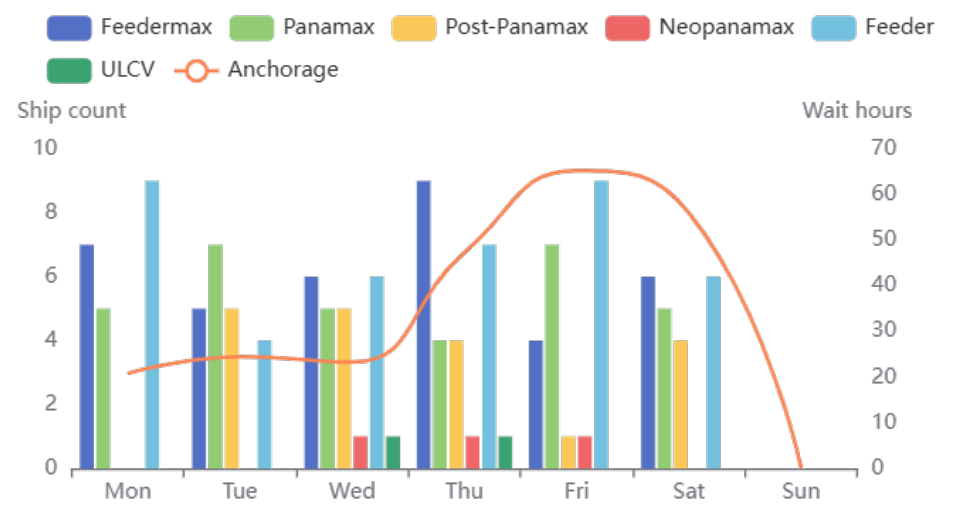
| Type  | M   | T   | W   | Th  | F   | Sat | Sun |
|-------|-----|-----|-----|-----|-----|-----|-----|
| F.ma. | 1   | 0   | 0   | 0   | 0   | 0   | 0   |
| Pan.  | 0   | 0   | 0   | 0   | 0   | 0   | 0   |
| PPx   | 0   | 0   | 0   | 0   | 1   | 1   | 0   |
| NPx   | 0   | 0   | 0   | 0   | 0   | 1   | 0   |
| Fd    | 1   | 0   | 2   | 0   | 0   | 0   | 0   |
| WT.h. | 1.7 | 0.0 | 4.2 | 0.0 | 5.3 | 16  | 0.0 |
| 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

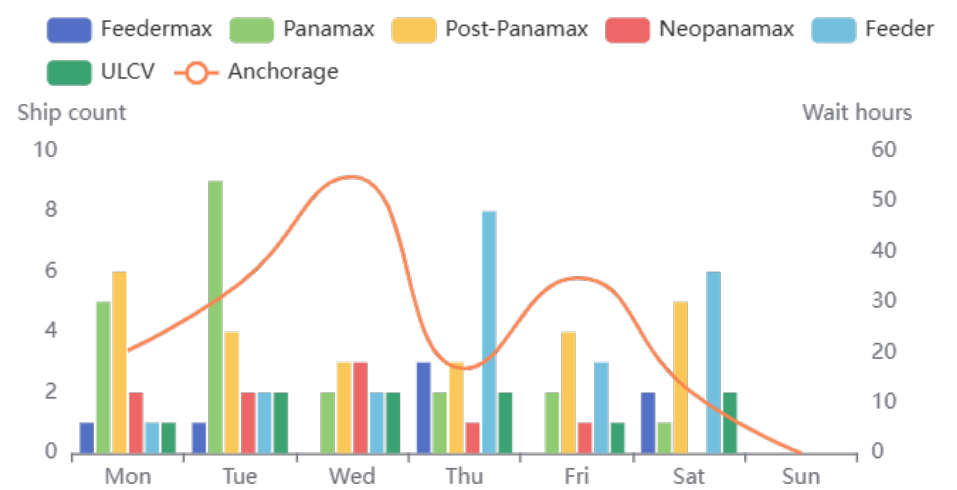
| Type  | M    | T    | W    | Th   | F     | Sat | Sun |
|-------|------|------|------|------|-------|-----|-----|
| F.ma. | 7    | 5    | 6    | 9    | 4     | 6   | 0   |
| Pan.  | 5    | 7    | 5    | 4    | 7     | 5   | 0   |
| PPx   | 0    | 5    | 5    | 4    | 1     | 4   | 0   |
| NPx   | 0    | 0    | 1    | 1    | 1     | 0   | 0   |
| Fd    | 9    | 4    | 6    | 7    | 9     | 6   | 0   |
| UlcV  | 0    | 0    | 1    | 1    | 0     | 0   | 0   |
| WT.h. | 20.8 | 24.5 | 23.3 | 47.3 | 65.25 | 56  | 0.0 |



## 最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

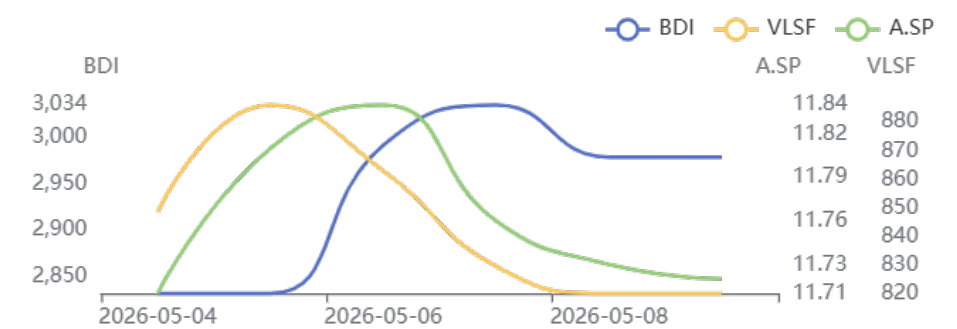
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

| Type  | M    | T     | W    | Th   | F    | Sat  | Sun |
|-------|------|-------|------|------|------|------|-----|
| F.ma. | 1    | 1     | 0    | 3    | 0    | 2    | 0   |
| Pan.  | 5    | 9     | 2    | 2    | 2    | 1    | 0   |
| PPx   | 6    | 4     | 3    | 3    | 4    | 5    | 0   |
| NPx   | 2    | 2     | 3    | 1    | 1    | 0    | 0   |
| Fd    | 1    | 2     | 2    | 8    | 3    | 6    | 0   |
| UlcV  | 1    | 2     | 2    | 2    | 1    | 2    | 0   |
| WT.h. | 20.4 | 33.75 | 54.9 | 16.8 | 34.8 | 12.5 | 0.0 |



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

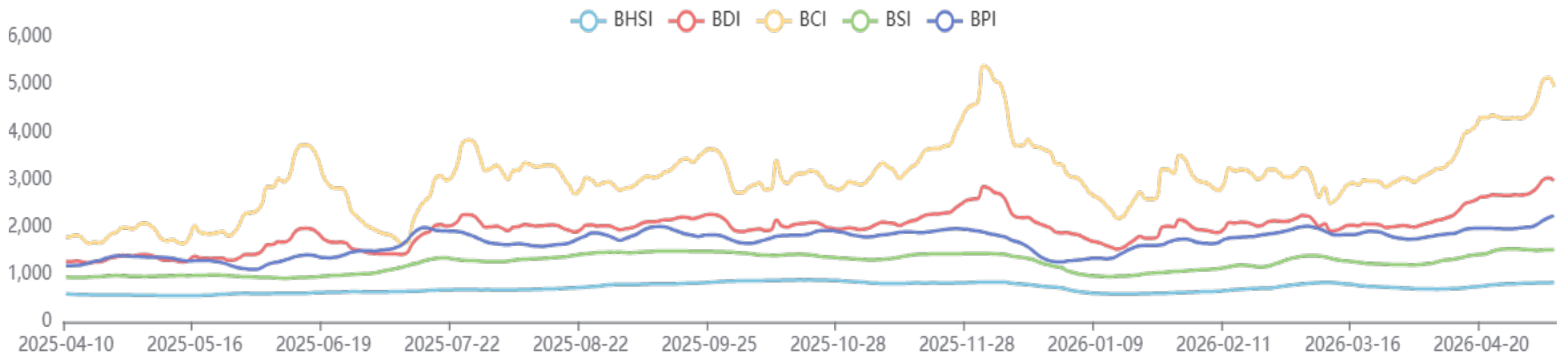
| Type | M     | T     | W     | Th    | F     | Sat   | Sun  |
|------|-------|-------|-------|-------|-------|-------|------|
| BDI  | 2054  | 2054  | 2135  | 2195  | 2233  | 2233  | 2233 |
| VLSF | 848.5 | 886   | 863   | 829.5 | 820   | 820   | 820  |
| A.SP | 11.71 | 11.81 | 11.84 | 11.76 | 11.73 | 11.72 |      |



# 第三部分 航运市场 SHIPPING MARKET

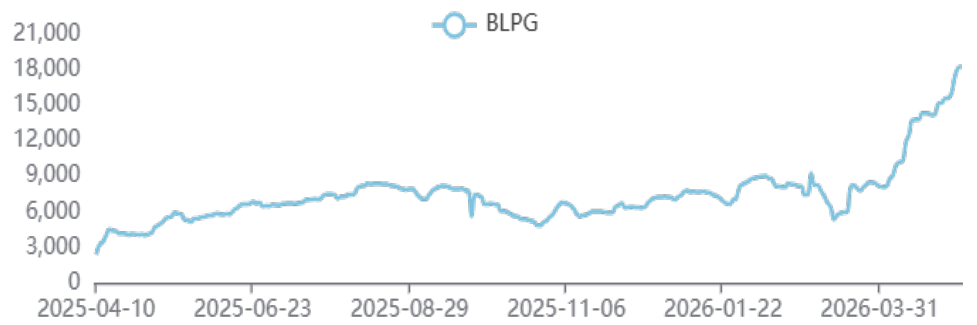
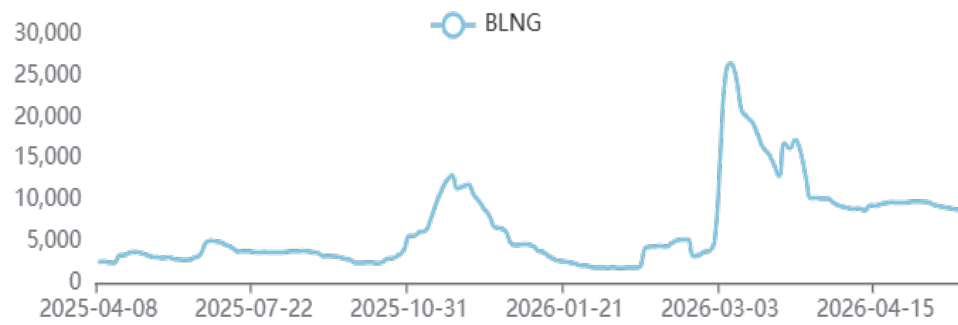
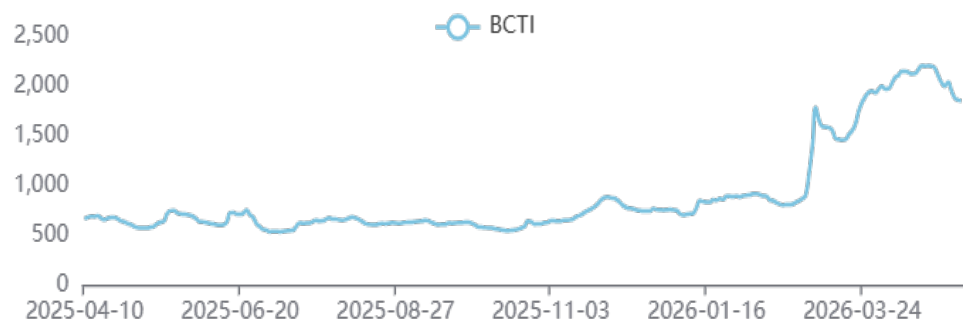
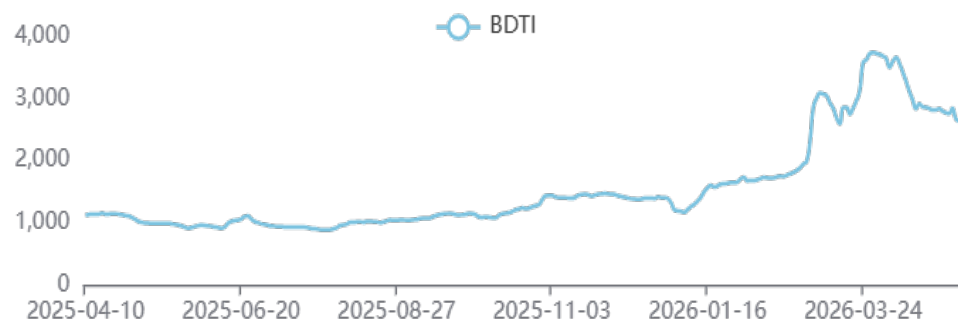
波罗的海干散货指数Baltic Dry Index

| Type | PI   | WoW   | W%    | M%    | y%     |
|------|------|-------|-------|-------|--------|
| BDI  | 2978 | 248.0 | 9.08  | 35.3  | 126.29 |
| BCI  | 4955 | 508.0 | 11.42 | 49.34 | 182.82 |
| BPI  | 2233 | 231.0 | 11.54 | 20.38 | 63.83  |
| BSI  | 1522 | 2.0   | 0.13  | 16.36 | 57.23  |
| BHSI | 833  | 18.0  | 2.21  | 19.17 | 50.36  |



能源运价指数Energy Shipping Index

| Type | PI    | WoW    | W%    | M%     | y%     |
|------|-------|--------|-------|--------|--------|
| BDTI | 2574  | -178.0 | -6.47 | -27.72 | 156.12 |
| BCTI | 1851  | -187.0 | -9.18 | -12.11 | 224.17 |
| BLNG | 8887  | -346.0 | -3.75 | -0.59  | 148.24 |
| BLPG | 18270 | 2658.0 | 17.03 | 79.54  | 328.77 |



## 第四部分 运力分布 SUPPLY DISTRIBUTION

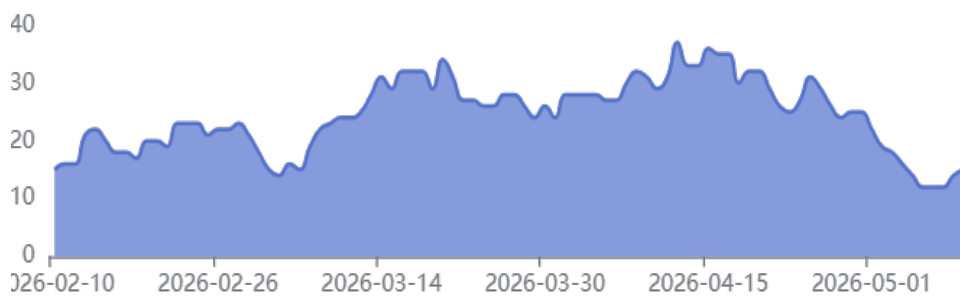


### 好望角型散货船 Capesize

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.

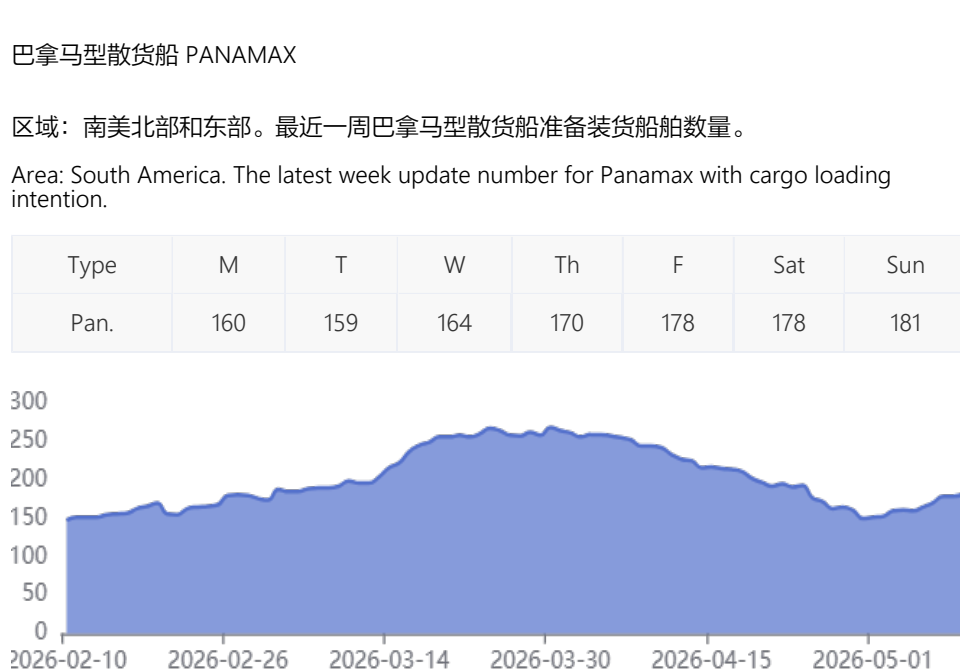
| Type | M  | T  | W  | Th | F  | Sat | Sun |
|------|----|----|----|----|----|-----|-----|
| Cape | 16 | 14 | 12 | 12 | 12 | 14  | 15  |



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 | 39 | 39 | 37 | 35 | 34 | 31  | 30  |

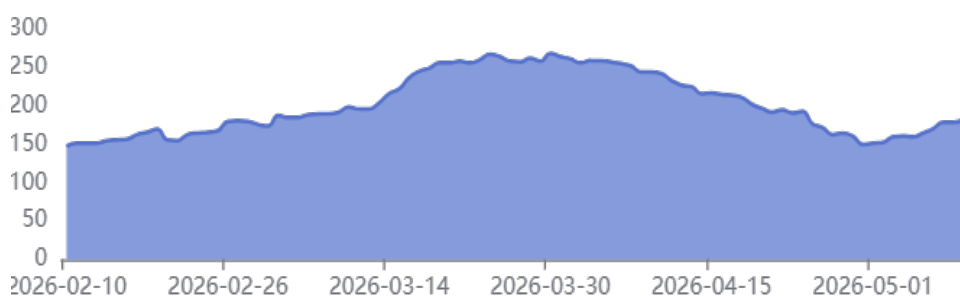


### 巴拿马型散货船 PANAMAX

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.

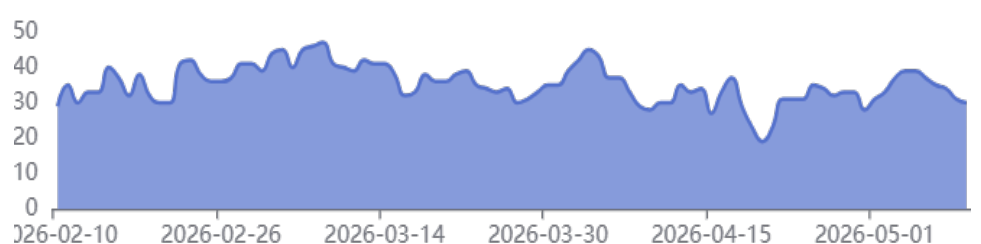
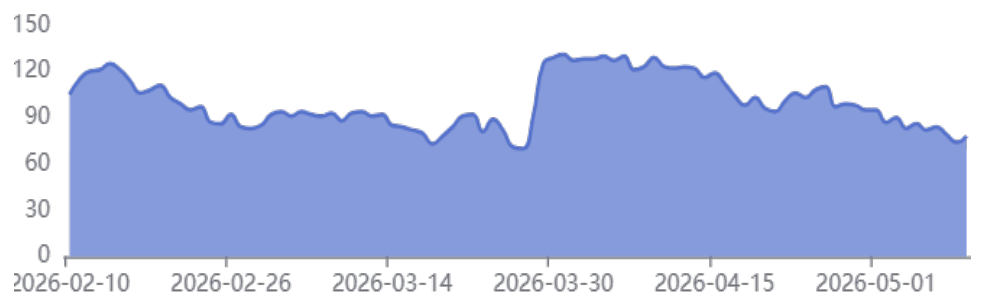
| Type | M   | T   | W   | Th  | F   | Sat | Sun |
|------|-----|-----|-----|-----|-----|-----|-----|
| Pan. | 160 | 159 | 164 | 170 | 178 | 178 | 181 |



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.

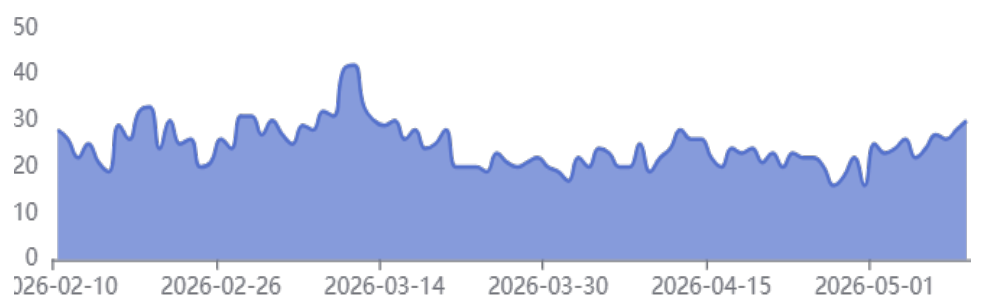
| Type | M  | T  | W  | Th | F  | Sat | Sun |
|------|----|----|----|----|----|-----|-----|
| Cape | 83 | 86 | 82 | 84 | 79 | 74  | 78  |



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.

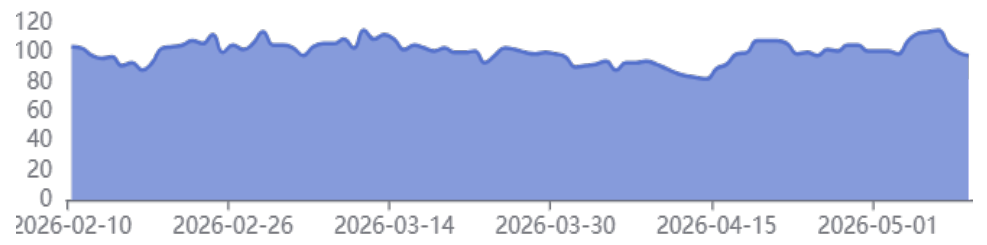
| Type | M  | T  | W  | Th | F  | Sat | Sun |
|------|----|----|----|----|----|-----|-----|
| Pan. | 13 | 10 | 11 | 10 | 11 | 11  | 10  |



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. | 108 | 113 | 114 | 115 | 105 | 100 | 98  |

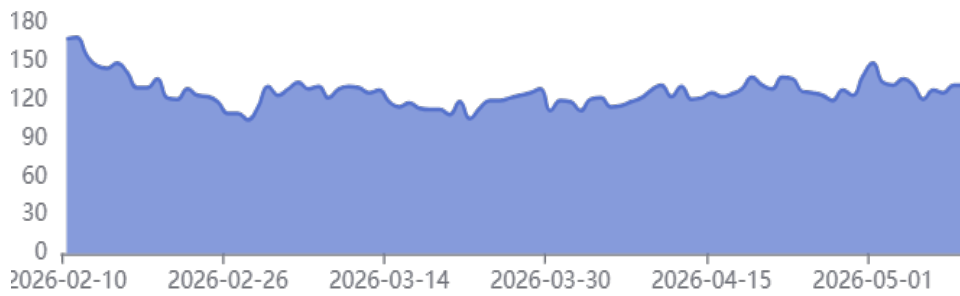


#### 超大灵便型散货 SUPRAMAX

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.

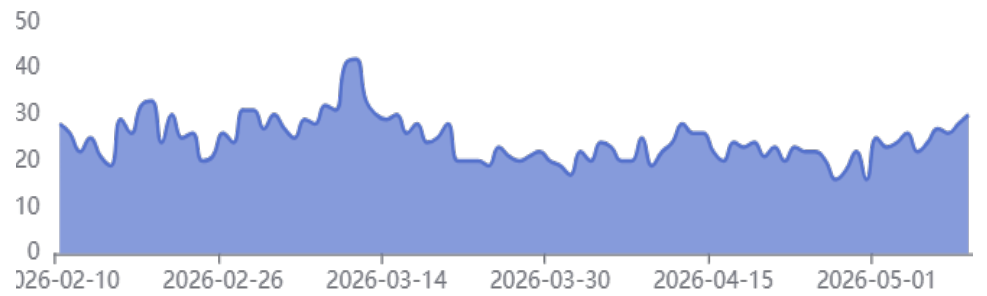
| Type | M   | T   | W   | Th  | F   | Sat | Sun |
|------|-----|-----|-----|-----|-----|-----|-----|
| SMX  | 136 | 131 | 120 | 127 | 125 | 131 | 131 |



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.

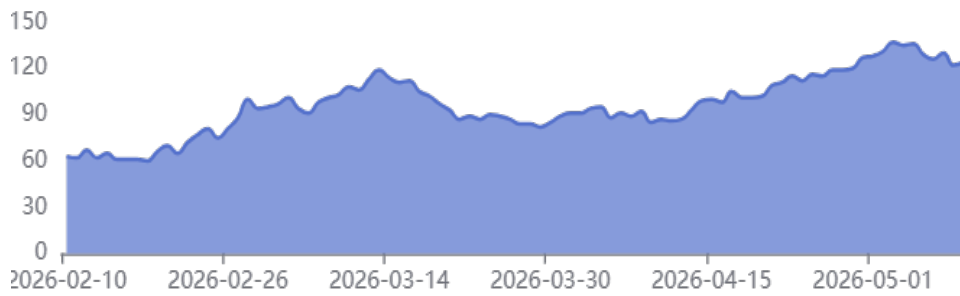
| Type | M  | T  | W  | Th | F  | Sat | Sun |
|------|----|----|----|----|----|-----|-----|
| SMX  | 26 | 22 | 24 | 27 | 26 | 28  | 30  |



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.

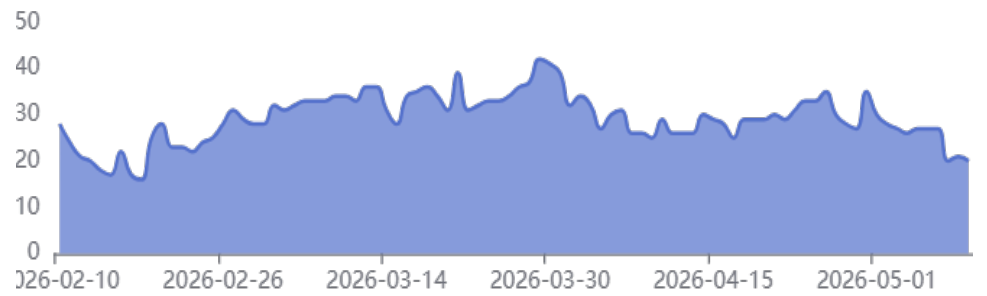
| Type | M  | T  | W  | Th | F  | Sat | Sun |
|------|----|----|----|----|----|-----|-----|
| SMX  | 26 | 27 | 27 | 27 | 20 | 21  | 20  |



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.

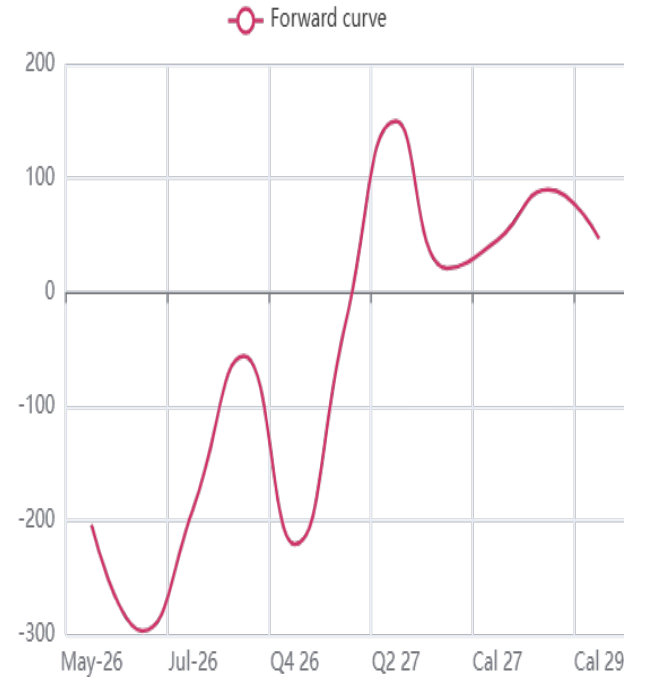
| Type | M   | T   | W   | Th  | F   | Sat | Sun |
|------|-----|-----|-----|-----|-----|-----|-----|
| SMX  | 135 | 136 | 129 | 126 | 130 | 122 | 124 |



# 第五部分 远期运价协议 FFA

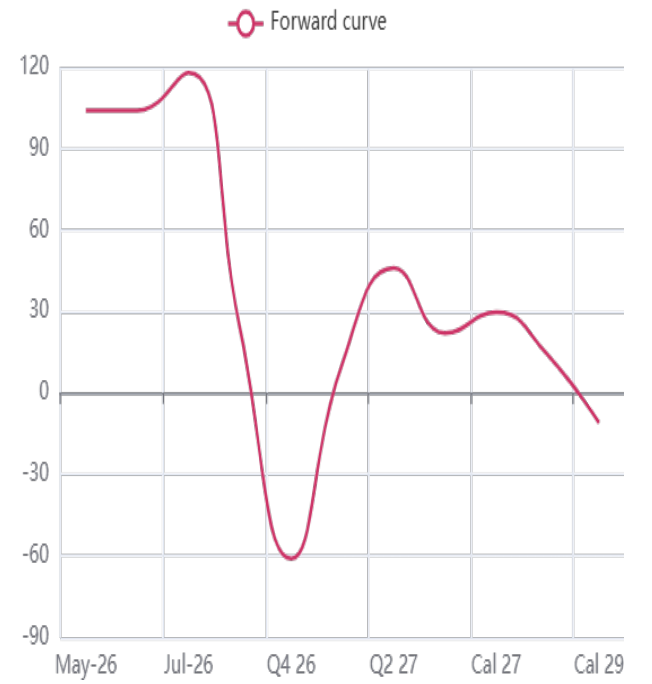
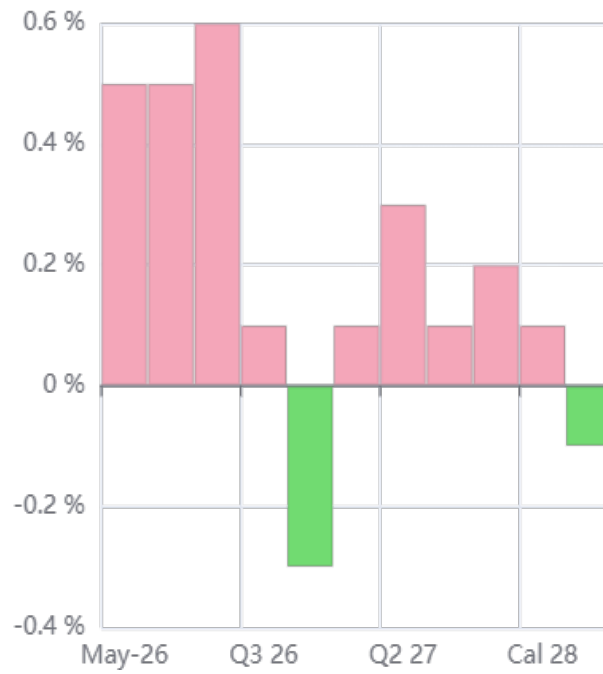
## 好望角型散货船Capesize

| 5TC    | \$/day    | WoW    |        |
|--------|-----------|--------|--------|
| May-26 | 41,899.00 | -204.0 | -0.5 % |
| Jun-26 | 37,892.00 | -297.0 | -0.8 % |
| Jul-26 | 35,367.00 | -190.0 | -0.5 % |
| Q3 26  | 34,754.33 | -56.0  | -0.2 % |
| Q4 26  | 34,214.00 | -221.0 | -0.6 % |
| Q1 27  | 25,432.00 | -28.0  | -0.1 % |
| Q2 27  | 30,714.00 | 150.0  | 0.5 %  |
| Q3 27  | 31,017.00 | 21.0   | 0.1 %  |
| Cal 27 | 29,542.50 | 45.75  | 0.2 %  |
| Cal 28 | 26,407.00 | 90.0   | 0.3 %  |
| Cal 29 | 25,282.00 | 47.0   | 0.2 %  |



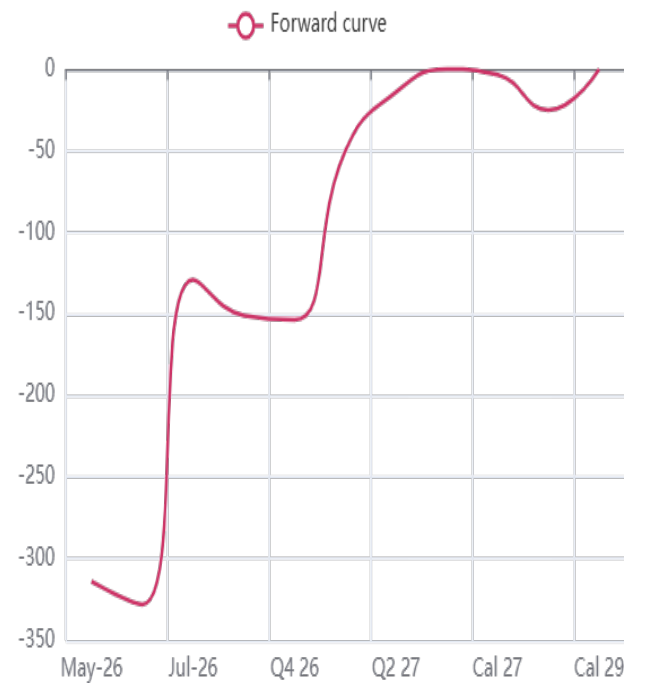
## 巴拿马型散货船Panamax

| 4TC    | \$/day    | WoW   |        |
|--------|-----------|-------|--------|
| May-26 | 20,650.00 | 104.0 | 0.5 %  |
| Jun-26 | 21,061.00 | 104.0 | 0.5 %  |
| Jul-26 | 20,482.00 | 118.0 | 0.6 %  |
| Q3 26  | 19,968.00 | 24.0  | 0.1 %  |
| Q4 26  | 17,921.00 | -61.0 | -0.3 % |
| Q1 27  | 14,350.00 | 11.0  | 0.1 %  |
| Q2 27  | 15,800.00 | 46.0  | 0.3 %  |
| Q3 27  | 15,254.00 | 22.0  | 0.1 %  |
| Cal 27 | 15,020.75 | 29.75 | 0.2 %  |
| Cal 28 | 13,932.00 | 14.0  | 0.1 %  |
| Cal 29 | 13,600.00 | -11.0 | -0.1 % |



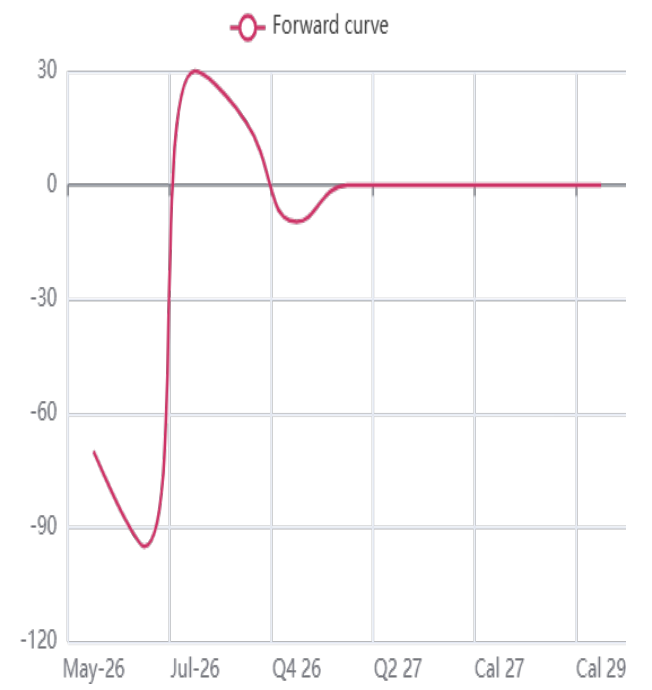
## 超大灵便型散货船Supramax

| 10TC      | \$/day    | WoW     |        |
|-----------|-----------|---------|--------|
| May-26    | 19,677.00 | -314.0  | -1.6 % |
| Jun-26    | 20,213.00 | -328.0  | -1.6 % |
| Jul-26    | 20,141.00 | -129.0  | -0.6 % |
| Q3 26     | 19,693.67 | -151.0  | -0.8 % |
| Q4 26     | 17,930.00 | -153.67 | -0.8 % |
| Q1 27     | 14,327.00 | -50.0   | -0.3 % |
| Q2 27     | 16,313.00 | -14.0   | -0.1 % |
| Q3 27     | 15,491.00 | 0.0     | 0.0 %  |
| 15,307.25 | Cal 27    | -3.5    | 0.0 %  |
| Cal 28    | 14,248.00 | -25.0   | -0.2 % |
| Cal 29    | 14,055.00 | 0.0     | 0.0 %  |



## 灵便型散货船Handysize

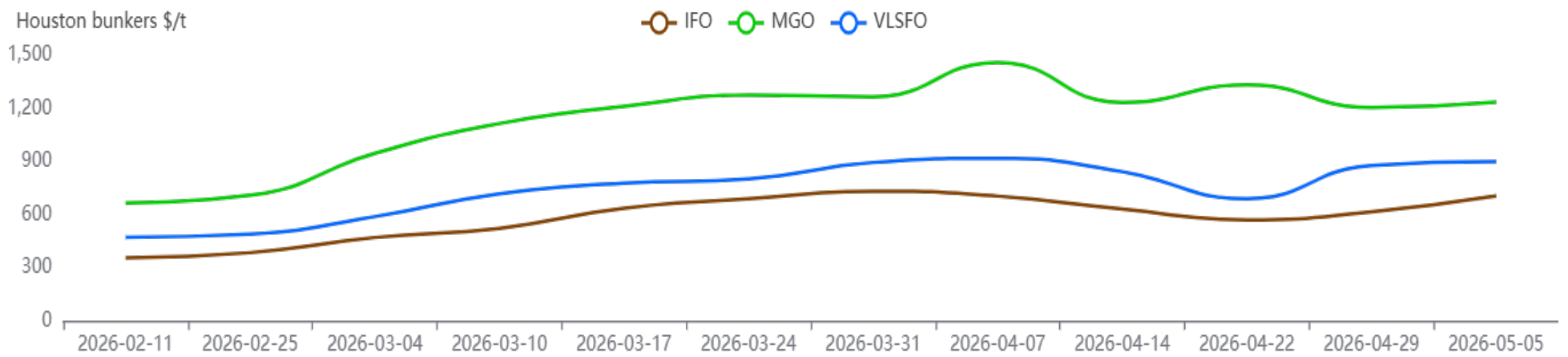
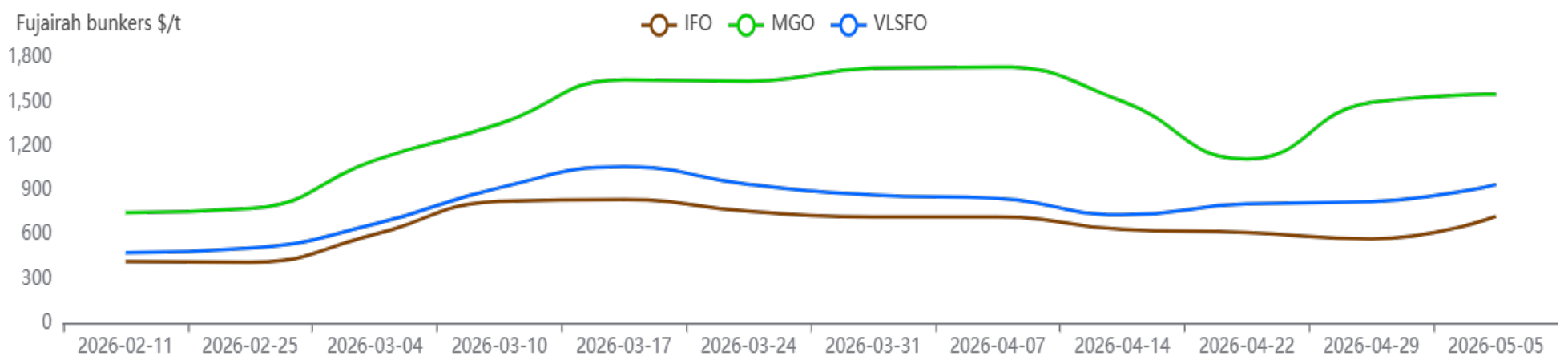
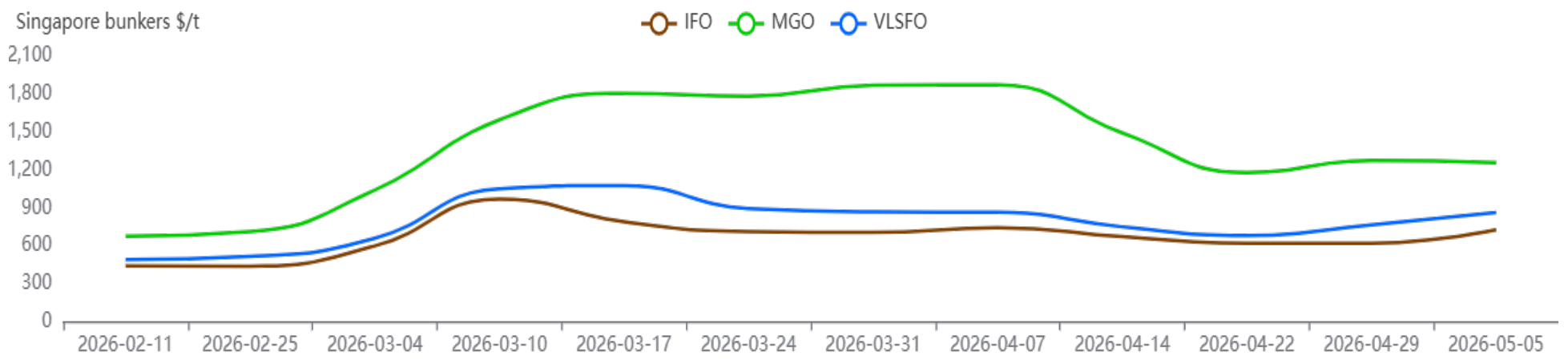
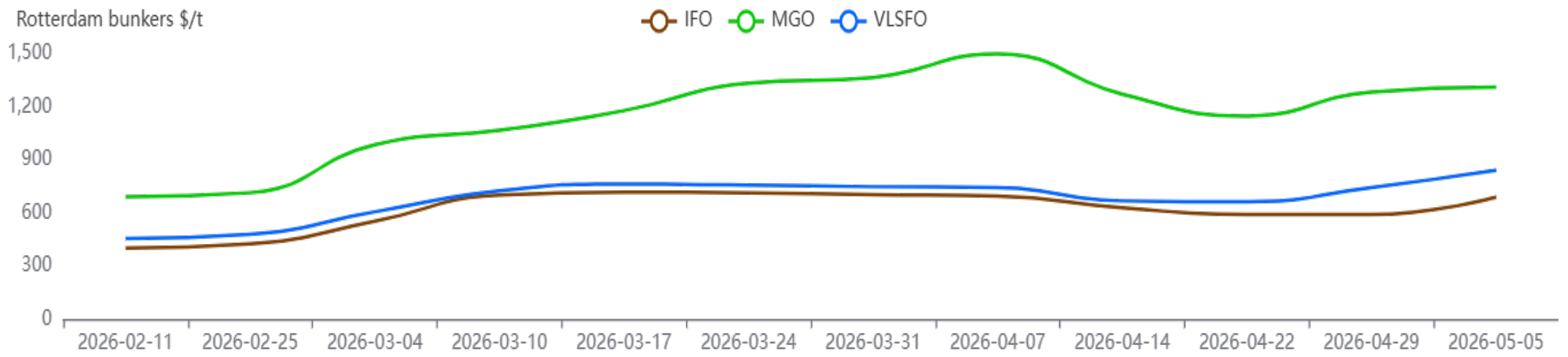
| 7TC    | \$/day    | WoW   |        |
|--------|-----------|-------|--------|
| May-26 | 15,310.00 | -70.0 | -0.5 % |
| Jun-26 | 15,725.00 | -95.0 | -0.6 % |
| Jul-26 | 15,310.00 | 30.0  | 0.2 %  |
| Q3 26  | 14,915.00 | 16.67 | 0.1 %  |
| Q4 26  | 14,020.00 | -9.67 | -0.1 % |
| Q1 27  | 11,450.00 | 0.0   | 0.0 %  |
| Q2 27  | 13,080.00 | 0.0   | 0.0    |
| Q3 27  | 12,770.00 | 0.0   | 0.0 %  |
| Cal 27 | 12,397.50 | 0.0   | 0.0 %  |
| Cal 28 | 11,720.00 | 0.0   | 0.0 %  |
| Cal 29 | 11,500.00 | 0.0   | 0.0 %  |



## 第六部分 燃油价格 BUNKER PRICE

| MP        | LO    | HO    | MO     | SP    | WoW   | W%     | M%    |
|-----------|-------|-------|--------|-------|-------|--------|-------|
| zhoushan  | 824.0 | 729.5 | 1400.5 | 94.5  | 18.5  | 24.34  | 22.73 |
| Singapore | 862.0 | 726.0 | 1258.0 | 136.0 | -9.0  | -6.21  | 10.12 |
| Rotterdam | 842.5 | 690.5 | 1312.5 | 152.0 | -0.5  | -0.33  | 213.4 |
| Fujairah  | 939.5 | 723.5 | 1553.0 | 216.0 | -37.5 | -14.79 | 72.8  |
| Houston   | 901.0 | 706.5 | 1236.0 | 194.5 | -68.0 | -25.9  | -9.11 |

(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               |           | 212.0    | -3.0    | -1.4   | 2.91    | 6.0    |
| Maize               |           | 236.0    | -1.0    | -0.42  | 2.61    | 2.16   |
| Soybeans            |           | 228.0    | 2.0     | 0.88   | 3.64    | 12.32  |
| Rice                |           | 162.0    | 0.0     | 0.0    | 2.53    | -8.47  |
| Barley              |           | 246.0    | -1.0    | -0.4   | 0.82    | 6.03   |
| Energy              |           | Index    | +/-     | Weekly | Monthly | YTD    |
| Crude Oil           | USD/Bbl   | 95.7     | -13.18  | -12.11 | -1.56   | 63.87  |
| Brent               | USD/Bbl   | 101.41   | -11.4   | -10.11 | 4.71    | 65.32  |
| Natural Gas         | USD/MMBtu | 2.79     | 0.15    | 5.68   | 2.2     | -23.56 |
| Gasoline            | USD/Gal   | 3.49     | -0.14   | -3.86  | 15.56   | 71.92  |
| Heating Oil         | USD/Gal   | 3.91     | -0.28   | -6.68  | 0.0     | 97.47  |
| Ethanol             | USD/Gal   | 1.97     | -0.09   | -4.37  | 1.03    | 14.53  |
| Naphtha             | USD/T     | 827.24   | -108.9  | -11.63 | -7.47   | 56.63  |
| Propane             | USD/Gal   | 0.86     | 0.05    | 6.17   | 16.22   | 21.13  |
| Uranium             | USD/Lbs   | 86.25    | -0.75   | -0.86  | 0.52    | 23.04  |
| Methanol            | CNY/T     | 3075.0   | -114.0  | -3.57  | -3.09   | 32.94  |
| TTF Gas             | EUR/MWh   | 44.78    | -2.62   | -5.53  | -1.15   | 29.57  |
| UK Gas              | GBP/thm   | 106.87   | -8.87   | -7.66  | -6.46   | 28.54  |
| Industrial          |           | Index    | +/-     | Weekly | Monthly | YTD    |
| Copper              | USD/Lbs   | 6.12     | 0.21    | 3.55   | 7.18    | 34.21  |
| Coal                | USD/T     | 132.2    | -1.45   | -1.08  | -2.44   | 33.87  |
| Steel               | CNY/T     | 3249.0   | 100.0   | 3.18   | 5.28    | 5.9    |
| Iron Ore            | USD/T     | 110.95   | 3.8     | 3.55   | 2.89    | 11.7   |
| Aluminum            | USD/T     | 3483.23  | 1.83    | 0.05   | 0.15    | 42.73  |
| Lithium             | CNY/T     | 190500.0 | 16000.0 | 9.17   | 20.19   | 191.95 |
| Metals              |           | Index    | +/-     | Weekly | Monthly | YTD    |
| Gold                | USD/t.oz  | 4722.41  | 159.48  | 3.5    | 0.1     | 41.07  |
| Silver              | USD/t.oz  | 80.02    | 7.79    | 10.78  | 8.44    | 146.67 |
| Platium             | null      | 2058.6   | 144.5   | 7.55   | 1.53    | 111.66 |
| Currencies          |           | Index    | +/-     | Weekly | Monthly | YTD    |
| EUR/USD             |           | 1.17     | 0.0     | 0.0    | 0.0     | 3.54   |
| USD/CNY             |           | 6.8      | -0.04   | -0.58  | -0.44   | -6.08  |

## 第八部分 本周话题 WEEKLY TOPIC



### 香港货量持续下滑

和记港口控股信托 (HPH Trust) 指出, 香港核心集装箱枢纽港正面临结构性衰退与货量持续下跌的困境, 这一趋势在疫情后因贸易格局转变、区域竞争加剧而进一步恶化。

该新加坡上市信托在最近4月份一份文件中表示, 其旗下香港葵青码头货量自 2018 年开启下行通道, 疫情后跌势加剧。文件回应了新加坡证券投资者协会针对公司 2025 年报的问询, 相关问题也在 4 月 29 日年度股东大会上审议。

香港与深圳盐田港走势分化, 葵青码头承压, 货量下滑核心原因是货主更倾向直靠内地港口, 同时香港港口受粤港澳大湾区周边港口竞争冲击。和记港口信托否认香港海港联盟安排扭曲货量, 称衰退是整体市场环境所致, 而非内部分配机制, 但目前正研究联盟的战略替代方案。即便货量下滑, 葵青码头通过成本优化、运营提效, 如吊机与人力灵活调配, 仍保持息税折旧摊销前利润为正。管理层仍依托香港自由港地位, 将其定位为国际中转港与“补班港”, 助力船公司保障班期。

粤港澳大湾区的深圳盐田港持续扩张, 最近几年盐田港保持强劲增长, 2025 年连续第二年刷新吞吐量纪录, 突破 1610 万标准箱。盐田东港区一期建设稳步推进, 首个泊位预计 2027 年投运, 初期年产能 100 万标准箱; 项目完工后将新增 3 个自动化泊位, 总产能 300 万标准箱, 巩固其超大型船舶挂靠枢纽地位。

大湾区内协同与升级举措, 和记港口信托通过深港通关便利化、与深圳港集团合资转船业务, 深化粤港

澳大湾区资源整合, 提升香港与内地物流网络联通性, 未来有望延伸至内地中西部港口。同时, 和记港口控股加码自动化与低碳化投入, 包括自动驾驶电动卡车、远程操控吊机及人工智能运营应用, 提升核心竞争力。

中东局势动荡冲击油轮运输, 但暂未影响集装箱货量; 若霍尔木兹海峡封锁等长期不稳定因素持续, 将推高燃油成本、扰乱班期、压制全球需求, 长期会增加运营开支、挤压盈利。和记港口控股表示将持续监控局势, 聚焦运营效率与财务稳健。

The Hutchison Port Holdings Trust (HPH Trust) stated that the core container hub port in Hong Kong is currently experiencing a structural decline and a continuous decline in cargo volume. This trend has further deteriorated after the pandemic due to changes in trade patterns and intensified regional competition.

The Singapore-listed trust stated in a recent April document that the cargo volume at its Kwai Chung Wharf in Hong Kong has been on a downward trend since 2018, and the decline has intensified after the pandemic. The document responded to inquiries from the Singapore Securities Investors Association regarding the company's 2025 annual report, and the related issues were also deliberated at the annual general meeting on April 29.

The trends of Hong Kong and Shenzhen Yantian Port are diverging. Kwai Tsing Terminal is under pressure, and the decline in cargo volume is mainly due to the fact that shippers are more inclined to directly rely on mainland ports. At the same time, Hong Kong ports are impacted by competition from surrounding ports in the Guangdong-Hong Kong-Macao Greater Bay Area. Hutchison Port Trust denies that the Hong Kong Port Alliance's arrangement has distorted the cargo volume, stating that the decline is caused by the overall market environment rather than the internal distribution mechanism. However, they are currently studying alternative strategic plans for the alliance. Even though the cargo volume has declined, Kwai Tsing Terminal has maintained a positive EBITDA (Earnings Before Interest, Taxes, Depreciation, and Amortization) through cost optimization and operational efficiency measures, such as flexible allocation of cranes and manpower. The management still relies on Hong Kong's free port status and positions it as an international transshipment port and a "catch-up port", helping shipping companies ensure their schedules.

The Shenzhen Yantian Port in the Guangdong-Hong Kong-Macao Bay Area has been continuously expanding. In recent years, the Yantian Port has maintained a strong growth rate. In 2025, it broke the throughput record for the second consecutive year, exceeding 16.1 million standard containers. The first phase of the Yantian East Port area construction is advancing steadily. The first berth is expected to be put into operation in 2027, with an initial annual capacity of 1 million standard containers. After the project is completed, three automated berths will be added, with a total capacity of 3 million standard containers, consolidating its position as a hub for super-large vessels.

The collaborative and upgrading measures within the Greater Bay Area, through the deepening of cross-border customs clearance facilitation between Shenzhen and Hong Kong, and the joint transshipment business with the Shenzhen Port Group, have enhanced the resource integration of the Guangdong-Hong Kong-Macao Greater Bay Area, improved the connectivity of the logistics network between Hong Kong and the mainland, and are expected to extend to the ports in the central and western regions of the mainland in the future. Meanwhile, Hutchison Port Holdings has increased investment in automation and low-carbonization, including self-driving electric trucks, remotely controlled cranes, and artificial intelligence operation applications, to enhance its core competitiveness.

The turmoil in the Middle East has affected oil tanker transportation, but it has not yet impacted container cargo volume. If long-term unstable factors such as the blockade of the Hormuz Strait persist, it will increase fuel costs, disrupt schedules, suppress global demand, and in the long run, increase operating expenses and squeeze profits. Hutchison Port Holdings stated that it will continue to monitor the situation and focus on operational efficiency and financial stability.

