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به نام خدا

مدیران محترم شرکتهای کشتیرانی ، نماینده کشتیرانی ، خدمات بندری و ... عضو و غیر عضو

موضوع: گزارش هفته ۳ سال ۲۰۲۳ بازار حمل و نقل بالتیک

با سلام؛

احتراماً به پیوست تصویر گزارش فدراسیون انجمن های ملی کشتیرانی و عوامل آن (فوناسبا) با موضوع
"گزارش هفته ۳ سال ۲۰۲۳ بازار حمل و نقل بالتیک" جهت استحضار ارسال میگردد.

با تجدید احترام

مسعود پل مه

دبیر کل

WEEKLY MARKET REPORT

Provided by kind permission of the Baltic Exchange

20th January 2023

Bulk report – Week 3

Capesize

The average of the Capesize timecharter routes climbed when the week first began, but soon dropped from over \$10,000 threshold to \$6,529 on Friday. The steep decline mainly came from the north Atlantic region. The transatlantic and fronthaul trips were settled at \$9,083 and \$23,031, losing over \$5,000 and \$7,000 respectively over the week. In the Pacific, the rate did not fluctuate much for the west Australia to Qingdao trade by maintaining above \$7 but was lower in the run up to Lunar New Year, however Pacific coal round voyages were offering some support to Owners. On the period front a 206,000-dwt 2012-built delivery in Tianjin this week was fixed till mid-year 2024 at \$17,700. Another 208,000-dwt 2020-built delivery Kaohsiung on 13 January was fixed for 9 to 11 months at \$21,500.

Panamax

Overall, it returned a further week of in the doldrums for the Panamax market, as thin cargo volumes versus a long tonnage count continued to negatively impact the market. A distinct lack of mineral requirements in the North Atlantic undermined the market here, and where there was demand it paid very low levels, suppressed all week by an increasing tonnage count of ballasters and early ships especially in the North Continent. Front haul trips from the Americas fared a little better, highlighted perhaps by reports of an 82,000dwt delivery Gibraltar fixed at \$19,000 for a trip via NC South America redelivery Far East. Asia, unsurprisingly, proved to be fairly subdued as the market prepared for Lunar New Year holidays. Already weak and imbalanced in recent weeks, despite relatively decent activity rates here failed to find any support route, with P3A averaging out at around the \$7,000 mark throughout the week.

Ultramax/Supramax

Another subdued week overall for the sector, with sentiment remaining negative in the Atlantic; the South American grain season has yet to start and limited fresh enquiry. A similar situation from North America combined with an abundance of prompt tonnage kept rates in check. A more positive feel from the Asia saw rates increase, although still at relatively low levels. The main driver for the area is the Indonesian coal runs but further north there remained a lack of fresh enquiry both for the NoPac and backhaul runs. Period enquiry weakened, with a 55,000-dwt open China failing at \$11,500 for 4-6 months trading. From South America, a 56,000-dwt fixed delivery North Brazil trip to Algeria at \$9,000. Elsewhere, a 60,000-dwt fixed from the Baltic to South Africa in the upper \$10,000s. From Asia, a 50,000-dwt open Cambodia fixed a trip via Indonesia to China at \$6,500. All eyes are now focused on the Year of the Rabbit to see any change in direction.

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Handysize

A week of further retraction for the BHSI, with limited enquiry and upcoming holidays both factors. However, there were some quiet whispers that positivity may be around the corner in a few regions but as yet we have not seen any gains. East Coast South America saw a 38,000 dwt fixing delivery Santos basis end of January dates for a trip to the Continent-Mediterranean range at \$10,000 whilst a 33,000 dwt fixed from Vila Do Conde via Itaqui to Algeria at \$9,250. A 34,000 dwt was fixed from the Western Mediterranean to Brazil with an intended cargo of fertilizer at \$5,250. A 37,000 dwt fixed-basis delivery Floro for 20 to 30 January at \$11,000 for two to three laden legs with worldwide redelivery. In Asia, a 38,000 dwt was fixed from Onsan to South East Asia at \$6,000. A 36,000 dwt was fixed basis delivery Ex Yard in Zhoushan to South East Asia at \$4,500.

Tanker report – Week 3

VLCC

The VLCC market rose marginally this week, except for the US Gulf to China route. 270,000mt Middle East Gulf to China recovered a modest two points to WS46.73, which translates into a round voyage TCE of \$18,100 basis the Baltic Exchange's vessel description, while 280,000mt Middle East Gulf to US Gulf (via the cape/cape routing) is assessed half a point firmer than last Friday at WS35.

In the Atlantic markets, the rate for 260,000mt West Africa/China stepped up 2.5-3 points to WS50.88 (a round trip TCE of about \$24,100 per day) and the rate for 270,000mt US Gulf/China fell by a little over \$211,100 to just below \$8.17 million (\$28,500 per day round trip TCE).

Suezmax

The Suezmax market was a mixed-bag rate wise this week. The rate for 135,000mt CPC/Augusta remained flat at about the WS203-204 level (a round trip TCE of \$115,100 per day).

In West Africa, sentiment is lower due mainly to news that the first half of February is reported to have fewer chartering opportunities compared to recent weeks. For the 130,000mt Nigeria/Rotterdam voyage, rates dropped 10 points to WS125 (a daily round trip TCE of \$48,600). In the Middle East, the rate for 140,000mt Basrah/Lavera slipped one point to WS71.25.

Aframax

In the North Sea market, rates for the 80,000mt Hound Point/Wilhelmshaven route rose a meagre one point to a WS162 (a round-trip daily TCE of \$57,400). In the Mediterranean, the rate for 80,000mt Ceyhan/Lavera rose five points to WS244 (a daily round trip TCE of \$92,300), with cargoes from Libya and the Black Sea able to tap into the Suezmax market, thereby capping the rates for the Aframax market.

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Across the Atlantic, the recent rise in rates seen for the Stateside Aframax market has slowed, with the rate for 70,000mt East Coast Mexico/US Gulf climbing through the WS200 barrier and settling on week-on-week improvement of about three points at WS203 (about \$56,800 per day round-trip TCE). The 70,000mt Covenas/US Gulf market also benefitted from a 2.5 point improvement to WS185 (a daily round-trip TCE of \$45,700). For the trans-Atlantic route of 70,000mt US Gulf/Rotterdam, rates climbed another five points to WS176 (showing a round trip TCE of \$42,100 per day).

Clean

The CPP tanker market has for the most part continued its drop this week. As with last week there are a couple of sectors that have managed to see small improvements.

LR's in the Middle East Gulf have continued to freefall. An LR2 to Japan, TC1, has lost just under 50 points this week to WS128.13. Similarly TC5, an LR1 for the same voyage, has dropped 62.5 points to WS148.93. For charters heading to the West, TC20 (90kt Jubail/Rotterdam) is now \$3,614,286 (-\$671,428) while 65kt on the same run (TC8) is now \$2,879,500, also down around \$600,000. At these levels LR TCE's are returning around \$20,000-25,000/day round trip.

MR's in the region continued upwards this week, reflected in the TC17 index rising 11.5 points to WS251.14.

LR's West of Suez have also been tested down this week with a widely reported TC15 voyage at \$3,100,000 on subjects and soft sentiment the index is currently marked at \$3,000,000 (-\$858,000). TC16 has also dipped 58 points to WS135.14.

UK-Continent MR's saw a flurry of activity early in the week and TC2 quickly climbed to just under WS220 and then returned down to WS205. Similarly TC19 peaked at WS235 to return down to WS218 at time of writing.

Handymaxs have made an improvement in the Mediterranean and we have seen TC6 climb 11.87 points to WS191.25 from increased requirement. TC23 (30kt Cross UK-Continent) after dropping about 30 Worldscale points has plateaued at WS150.

In the Americas, the downward pressure has continued this week, most notably on a vessel needing a dry dock reported on subjects at WS75 for a Transatlantic run. The TC14 index has come down to WS80.83 (-10.21) with TC18 only losing an incremental five points to WS145 and a trip to the Caribbean on TC21 shedding \$10,000 to \$475,000.