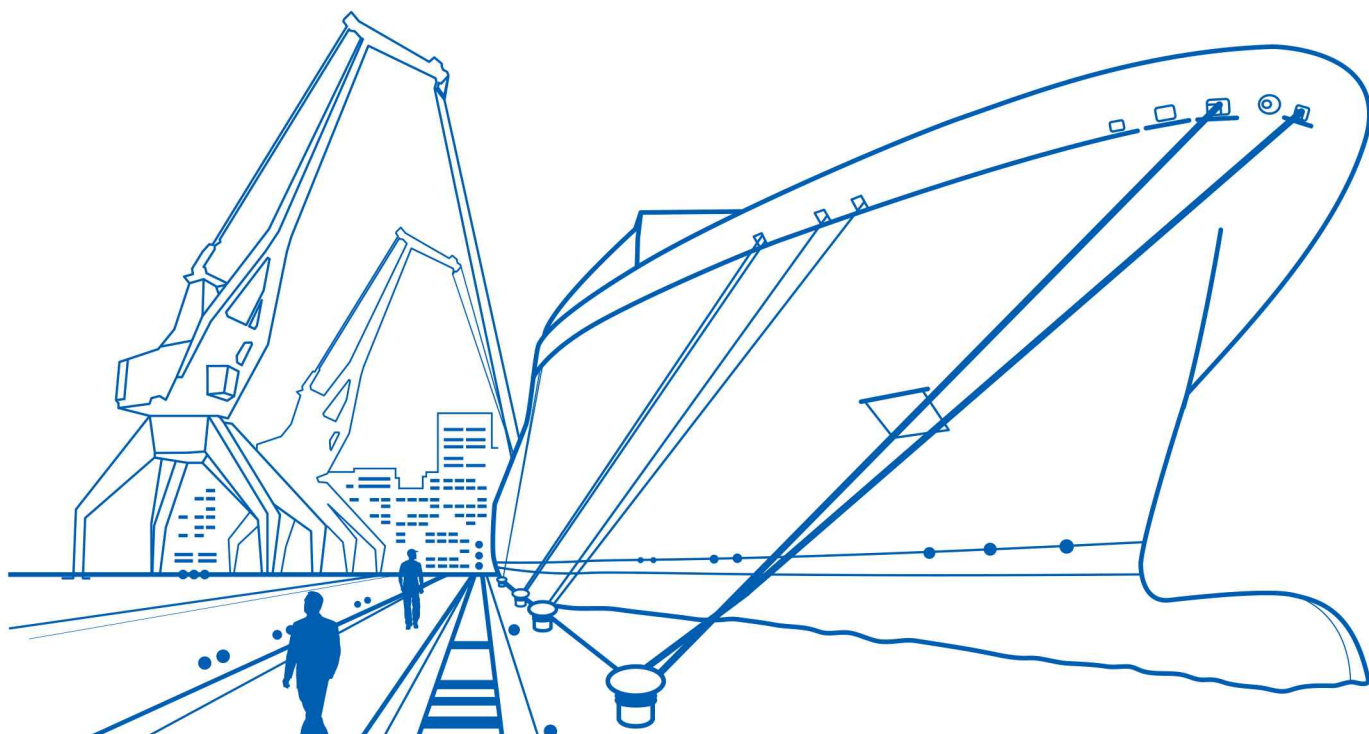


July 5th 2019

KOBC DRYBULK WEEKLY REPORT



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Weekly Highlight

Freight Market : Strong

Commodity Market : Firm

Supply Market : Mixed

Freight Market

- ▶ 철광석과 석탄 오더가 동시에 증가하며 폭발적인 상승세 구현
- ▶ 대형선 / 대서양 중심의 상승으로 중소형선 태평양 항로는 일부 조정됨
- ▶ 다음주 대형선 중심의 상승세 이어가겠으나 상승폭은 금주 대비 제한될 전망

<운임 지표>

구분	2018.Avg	2019.June	28-June	5-July	+/-
Capesize	19,830	17,826	21,122	26,969	▲5,847
Panamax	12,528	10,949	10,827	12,298	▲1,471
Supramax	11,956	9,005	9,259	9,551	▲292
Handy	9,644	6,363	6,527	6,629	▲102
Average	13,490	11,036	11,934	13,862	▲1,928

(단위 : USD/day)

Commodity Market

- ▶ 미중 무역분쟁의 일시 휴전에 따른 기대감으로 철강 및 철광석 가격 전반적 상승
- ▶ 석탄은 유럽 폭염 및 아시아의 하계 재고구축 수요로 상승
- ▶ 곡물은 미중 무역분쟁 휴전에 따른 수요 증대 기대감과 미국 작황 개선 전망에 따른 공급 증가 전망이 엇갈리며 보합

<원자재 가격 동향>

단위: USD/Ton

구분	2019.Apr	27-June	4-July	+/-
Iron Ore Aus 62%(CIF)	93.70	116.70	122.50	▲5.80
Steam Coal Newcastle(FOB)	80.80	68.56	67.05	▼1.51
Coking Coal Australia(FOB)	203.82	203.70	200.35	▼3.35
Soybean	842.88	855.25	852.25	▼3.00
Wheat	444.06	555.00	522.00	▼33.00
Corn	332.06	425.00	417.25	▼7.75

* 석탄은 21 June, 28 June 기준 가격

* 곡물은 27 June, 3 July 기준 가격

* 곡물 가격 단위는 US ¢/bu임

Supply Market

- ▶ 신조 거래 소식 없이 조용한 모습이며, 선가도 보합세 유지
- ▶ 중고 거래는 중국 및 그리스 선주위주로 활발한 모습이었으며, 선가는 소폭 상승

<선가 동향>

	구분	2018.Avg	27-June	04-Jul	+/-
NB	Capesize (180K)	46.52	50.34	50.34	-
	Panamax (77K)	25.97	26.95	26.95	-
	Supramax (58K)	23.89	24.61	24.61	-
	Handy (33K)	22.30	23.07	23.07	-
2nd	Capesize 5Y	34.32	32.67	32.68	▲0.01
	Panamax 5Y	20.31	20.08	20.10	▲0.02
Hand	Supramax 5Y	16.94	16.79	16.79	▼0.01
	Handy 5Y	14.24	14.94	14.95	▲0.01

(단위: Mil USD)

Freight Rate by Types

(USD/Day)



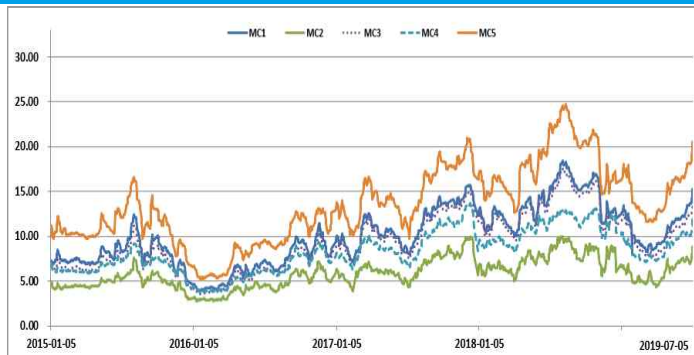
Freight Market

Capesize Market

- ▶ 호주 주요 광산업체들의 하계 유지보수 대비 철광석 선취 수요 유입 및 대서양 선적 석탄 수요가 증가하며 전 수역에 걸친 시황 급등
- ▶ 스크러버 장착을 위해 입거중인 선박이 증가한 점이 선박 공급을 제한하고 있다는 의견도 제시됨
- ▶ 중국 내 철강가격 회복세 및 철광석 항만재고 감소세 지속으로 당분간 중국향 철광석 수요 지속될 전망

Cape VC Rate Trend

(USD/Ton)

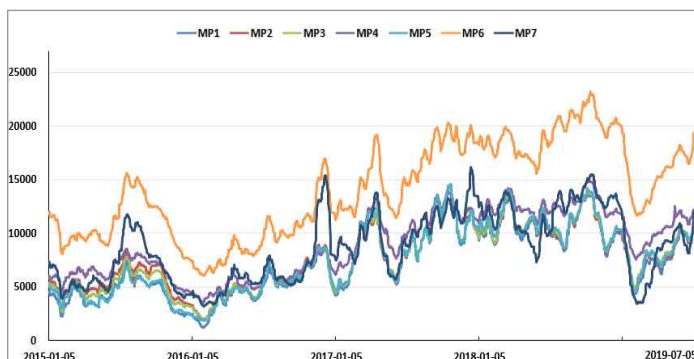


Panamax Market

- ▶ 북대서양 내 F/H 및 T/A 석탄 수요 급증 및 Cape 급등에 따른 전이 효과로 강한 상승세 구현
- ▶ 유럽의 때 이른 고온 현상에 따른 석탄 수요 증가 및 유럽 연료탄의 아시아향 판매 증가, 남미 곡물 수요 지속등이 동시에 작용하며 시황 견인
- ▶ Cape 급등에 따라 전 수역에서 견인 효과를 기대할 수 있으나, 태평양 자체 수요가 다소 부진한 점은 상승세를 제한할 요인으로 보임.

Panamax TC Rate Trend

(USD/Day)

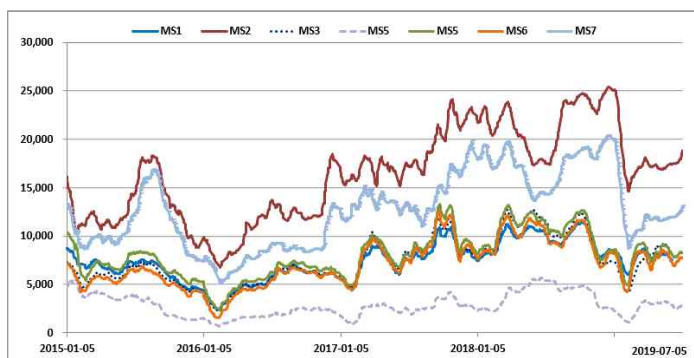


Supramax Market

- ▶ 흑해와 남미의 꾸준한 수요 및 USG 선박 부족 지속으로 대서양 중심의 상승세
- ▶ 태평양은 호주 및 인도네시아의 중국향 석탄 수요 증가에도 불구하고 북태평양 수역의 선박 공급 과잉이 시장 상승을 제한함.
- ▶ 다음주에도 대서양 상승 / 태평양 조정의 패턴 유지할 것으로 예상됨

Supramax TC Rate Trend

(USD/Day)



Handy Market

- ▶ 태평양과 대서양이 상이한 방향의 움직임을 보이며 보합세
- ▶ 주 후반 대서양은 상승폭 확대, 태평양은 하락폭 감소하며 전체적 상승을 위한 기반 마련함

Handy TC Rate Trend

(USD/Day)



Freight Market (Source : MEIC Panel)

Capesize VC & TC Rate

(USD/Ton for MC1-5, USD/Day for MC6-9)

Code	Route Description	2016.AVG	2017.AVG	2018.AVG	2019.June	2018.07.05(A)	2019.06.28(B)	2019.07.05(C)	+/- (C-B)	+/- (C-A)
MC1	160,000MT Saldanha Bay-Qingdao	6.77	11.30	13.82	12.73	15.45	13.63	15.26	▲ 1.63	▼ 0.19
MC2	160,000MT W.Australia-Qingdao	4.44	6.66	7.59	7.37	8.48	6.99	8.80	▲ 1.81	▲ 0.32
MC3	150,000MT R.Bay-Qingdao	6.18	10.72	13.10	11.73	14.70	12.33	13.78	▲ 1.45	▼ 0.92
MC4	130,000MT Newcastle-Zhoushan	6.00	9.37	10.92	10.25	11.95	10.11	11.83	▲ 1.72	▼ 0.12
MC5	160,000MT Tubarao-Qingdao	8.95	14.98	18.34	17.21	22.55	18.09	20.49	▲ 2.40	▼ 2.06
MC6	PRC/Japan-Brazil-PRC/Japan	7,156	14,321	16,021	15,091	21,163	16,988	21,500	▲ 4,512	▲ 337
MC7	PRC/Japan-E.Australia-PRC/Japan	7,018	14,802	16,059	15,867	18,725	15,250	20,875	▲ 5,625	▲ 2,150
MC8	A.R.A/Gib-Bolivar-A.R.A/Gib	7,689	15,705	16,559	11,714	25,788	16,500	22,000	▲ 5,500	▼ 3,788
MC9	A.R.A/Gib-USEC/Canada-PRC/Japan	13,933	25,849	30,680	28,631	41,300	35,750	43,500	▲ 7,750	▲ 2,200
TC Average(180,000DWT)		8,949	17,669	19,830	17,826	26,744	21,122	26,969	▲ 5,847	▲ 225

Panamax TC Rate

(USD/Day)

Code	Route Description	2016.AVG	2017.AVG	2018.AVG	2019.June	2018.07.05(A)	2019.06.28(B)	2019.07.05(C)	+/- (C-B)	+/- (C-A)
MP1	S.PRC-Indonesia-S.PRC	4,964	9,163	10,660	9,564	9,883	9,317	10,350	▲ 1,033	▲ 467
MP2	F.EAST-Australia-E.C India	5,307	9,298	10,846	9,658	9,980	9,380	10,600	▲ 1,220	▲ 620
MP3	PRC-NOPAC or Australia-PRC	5,259	9,311	10,962	9,898	10,208	9,750	10,717	▲ 967	▲ 509
MP4	S'pore-ECSA-F.EAST	5,787	10,586	12,645	11,405	11,910	11,450	12,180	▲ 730	▲ 270
MP5	Busan-CIS-N.PRC	5,151	9,424	11,110	9,916	10,250	9,720	10,800	▲ 1,080	▲ 550
MP6	Passing Gib-USG-F.EAST	9,702	15,785	19,305	17,168	18,340	17,080	19,360	▲ 2,280	▲ 1,020
MP7	Passing Gib-USG-Skaw/Passero	6,466	10,272	12,169	9,033	10,040	9,090	12,080	▲ 2,990	▲ 2,040
TC Average(74,000DWT)		6,091	10,548	12,528	10,949	11,516	10,827	12,298	▲ 1,471	▲ 782

Supramax TC Rate

(USD/Day)

Code	Route Description	2016.AVG	2017.AVG	2018.AVG	2019.June	2018.07.05(A)	2019.06.28(B)	2019.07.05(C)	+/- (C-B)	+/- (C-A)
MS1	PRC-NOPAC or Australia-PRC	5,265	7,816	9,668	7,472	10,247	7,624	7,873	▲ 249	▼ 2,374
MS2	USG-S'pore/Japan	11,488	18,401	21,710	17,570	17,480	17,930	18,820	▲ 890	▲ 1,340
MS3	CJK via Indonesia/Phil - PRC (Nickel Ore)	5,287	8,443	10,351	7,797	11,550	7,875	8,108	▲ 233	▼ 3,442
MS4	S'pore/Japan-USG	1,819	2,563	4,079	2,698	5,420	2,730	2,990	▲ 260	▼ 2,430
MS5	S.PRC-Indonesia-EC.India	5,700	8,776	10,683	8,049	11,242	8,343	8,247	▼ 96	▼ 2,995
MS6	S.PRC-Indoneisa-PRC	4,961	8,226	9,805	7,323	10,418	7,781	7,716	▼ 65	▼ 2,702
MS7	USG-Skaw/Passero	8,310	14,048	17,400	12,129	14,310	12,530	13,100	▲ 570	▼ 1,210
TC Average(58,000DWT)		6,119	9,753	11,956	9,005	11,524	9,259	9,551	▲ 292	▼ 1,973

Handy TC Rate

(USD/Day)

Code	Route Description	2016.AVG	2017.AVG	2018.AVG	2019.June	2018.07.05(A)	2019.06.28(B)	2019.07.05(C)	+/- (C-B)	+/- (C-A)
MH1	F.EAST-SE Asia	5,185	6,994	8,331	6,345	9,049	6,530	6,615	▲ 85	▼ 2,434
MH2	PG/WC India-F.EAST	4,410	8,954	10,872	7,360	10,850	7,488	7,750	▲ 262	▼ 3,100
MH3	S.PRC/SE Asia-F.EAST	4,265	7,223	8,915	6,383	9,450	6,530	6,553	▲ 23	▼ 2,897
MH4	Busan-CIS-F.EAST	4,827	7,063	8,765	6,407	9,140	6,600	6,675	▲ 75	▼ 2,465
MH5	Skaw/Passero-USG-Skaw/Passero	6,283	10,066	11,335	5,321	10,913	5,488	5,550	▲ 62	▼ 5,363
TC Average(33,000DWT)		4,994	8,060	9,644	6,363	9,880	6,527	6,629	▲ 102	▼ 3,251

Freight Market – Fixture (Source : MEIC Panel)

Capesize Fixture - VC

	VSL Name	Cargo Q'ty	L/Port	D/Port	LYCN	FRT(USD/Ton)	Terms	Charterer
F/Haul	Brave Sailor	170000/10	Tubarao	Qingdao	10/20 July	18.30	3days shinc/30000shinc	Vale
	Hannes Oldendorff	190,000/10	Tubarao	Qingdao	1/10 Aug	19.25	3days shinc/30000shinc	Koch
	Star Leo	190,000/10	Tubarao	Qingdao	1/10 Aug	19.25	3days shinc/30000shinc	Koch
	Alpha Dignity	170,000/10	Tubarao	Qingdao	27 July	19.85	3days shinc/30000shinc	Trafigura
Pacific	TBN	170,000/10	Dampier	Qingdao	12/14 July	6.95	90,000shinc/30,000shinc	Rio Tinto
	Ocean Shine	170000/10	Dampier	Qingdao	15/17 July	7.90	90000shinc/30000shinc	Rio Tinto
	TBN	170,000/10	Dampier	Qingdao	13/15 July	8.20	90,000shinc/30,000shinc	Rio Tinto
	Cyclades	170,000/10	Dampier	Qingdao	13/15 July	8.25	90,000shinc/30,000shinc	Rio Tinto
	Tiger Jiangsu	130,000/10	Newcastle	Dangjin	15/19July	10.95	40,000shinc/22,500shinc	Kepco(tender)
	SwissNMaxTBN	180,000/10	Port Hedland	Qingdao	10/12July	7.30	80,000shinc/30,000shinc	RoyHill
	TBN	170000/10	Port Hedland	Qingdao	12/13 July	7.90	80000shinc/30000shinc	FMG

Capesize Fixture - TC

	VSL Name	DWT	Built	DEL	REDEL	LYCN	Details	Hire(USD/day)	Charterer
F/Haul	Stella Anita	180,355	2012	Karabiga	Far East	30 June	trip via BlackSea	50,000	Panocean
	Golden Houston CCL	181,214	2014	Yuzhny	S'pore/Japan	18/23 July	Trip via Blacksea	51,000	Panocean
	KSL Santos CCL	181,055	2014	Yuzhny	S'pore/Japan	10 July	Trip via Blacksea	51,000	Five Ocean
Pacific	Genco Resolute	181,060	2015	Pyeongtaek	China	2 July	trip via Australia	17,000	Classic Mariime
	Erato	180,120	2010	Rizhao	China	6 July	trip via Australia	18,000	Classic Mariime
	Tiger Jiangsu	180,000	2010	Zhoushan	s.korea	1/2 July	trip via Newcastle	17,000	Classic Mariime
	Tiger Jiangsu Dealim	180,096	2010	Zhoushan	S'pore/Japan	1/2 July	trip via Newcastle	17,000	Five Ocean

Iron ore Route Fixtures

	W.Australia-F.East	Brazil-F.East	Total
2019.June	59	17	76
2019.06.26	16	1	17
2019.07.03	10	4	14
+/-	▼ 6	▲ 3	▼ 3

Major Shippers Fixtures

	Rio Tinto	BHP Billiton	FMG	Vale	Total
2019.June	14	6	2	5	27
2019.06.26	6	3	0	3	12
2019.07.03	3	0	1	1	5
+/-	▼ 3	▼ 3	▲ 1	▼ 2	▼ 7

Freight Market – Fixture (Source : MEIC Panel)

Panamax Fixture - VC

	VSL Name	Cargo Q'ty	L/Port	D/Port	LYCN	FRT(USD/Ton)	Terms	Charterer
F/Haul	TBN	75,000/5	Newport News	EC India	01/10 Aug	29.70	40,000sshex/20,000sshex	SAIL
Pacific	TBN	70,000/10	IBT	Mauban	25 June/5 July	5.55	35,000shinc/20,000shinc	LD Bulk
	TBN	75,000/10	Dalrymple Bay	Visakhapatnam	15/25 July	13.60	35,000sshex/20,000sshex	SAIL
	TBN	75,000/10	Dalrymple Bay	Visakhapatnam	21/30 Jul	14.65	35,000sshex/20,000sshex	SAIL
	TBN	75,000/10	Abbot Point	Gangavaram	12/21 Jul	13.15	25,000shinc/40,000shinc	RINL

Panamax Fixture - TC

	VSL Name	DWT	Built	DEL	REDEL	LYCN	Details	Hire(USD/day)	Charterer
Atlantic	Thalassic	81,426	2009	Bacarena	Egypt	15/23 July	Trip	16,500+175,000(BB)	cnr
	Falkonera	81,800	2012	ECSA	Gibraltar-Skaw	19 July	Trip	18,000	Bunge
F/HAUL	Nord Gemini	81,870	2017	Damietta	S'pore/Japan	8 July	Trip	25,000	Tata NYK
	Angelina	74,540	2001	ECSA	S'pore/Japan	4 July	Trip	14,300+430,000(BB)	Tata NYK
	Braveheart	74,117	2001	ECSA	SE Asia	01/05 Aug	trip	14,500+450,000(BB)	Cofco Agri
	Ariana	81,600	2019	ECSA	S'pore/Japan	12 July	trip	15200+520000(BB)	CNBM
	Huayang Pioneer	75,750	2012	ECSA	S'pore/Japan	12 July	trip	14750+475000(BB)	Ausca
	Star Topaz	81,800	2018	ECSA	SE Asia	16 July	Trip	15,500+550,000(BB)	Pacific Success
	Rosco Plum	76,801	2004	ECSA	S'pore/Japan	17 July	Trip	15,000+500,000(BB)	Yukdat
	Yiannis N G	81,043	2014	Santos	S'pore/Japan	14/15 July	Trip	15,150+515,000(BB)	cnr
	JY Pacific	82,000	2019	CJK	India	1/5 July	Trip via Aus	11,000	cnr
	Eships Dugon	79,200	2011	Ennore	India	27/28 June	trip via Mina Saqr int limestone	10,000	Omegra
Pacific	Cosmar	82,025	2016	Fangcheng	India	1/2 July	Trip via Indonesia	11,500	cnr
	Omicron Nikos	75,730	2003	Fujairah	S.China	Ppt	Trip via Black Sea	14,500	ADMI
	Taihang 8	72,000	1999	Haikou	China	7/8 July	trip via Indo Coal	9,500	Victory Shipping
	marilena	81,354	2008	Haldia	S'pore/Japan	17 July	Trip	15,000+500,000(BB)	Agricore
	Hua Yang Chuan Qi	76,945	2003	Hong Kong	S.China	02/03 July	trip via Indonesia	10,500	Hyundai Glovis
	Zaheng Jie	73,049	1997	Hong Kong	S.China	5/6 July	Trip via Indonesia	10,750	CNR
	Rui Ning 21	75,564	2014	Limay	S.Korea	8/13 July	Trip via W.Aus int Salt	14,000	CNR
	BBG Bright	82,043	2012	Longkou	India	Spot	Trip via E.Aus	11,000	Star Logistics
	Medi Newport	82,000	2017	Shibushi	China	4/6 July	trip via Nopac Grain	12,250	Cargill
	Europa Graeca	82,000	2019	Singapore	SE Asia	retro 30 June	trip via ECSA	13,250	Cargill
	CSSC He Mei	82,000	2019	Taeen	S'pore/Japan	6 July	Trip via Nopac	12,500	Norden
	SITC Huangshan	76,155	2012	Yosu	S.China	30 Jun/04 Jul	trip via Newcastle	10,750	Cosco
Period	Kavo Alkyon	75,409	2005	Toyohashi	WW	Ppt	7/10 months trading	11,000	Tongli

Panamax Fixtures by Major Routes

	Indonesia R.V	E.Australia R.V	ECSA-F.EAST	Total
2019.June	24	15	34	73
2019.06.26	10	3	13	26
2019.07.03	4	4	7	18
+/-	▼ 6	▲ 1	▼ 6	▼ 8

Period Fixtures

	4-7M	11-14M	Other	Total
2019.June	1	0	1	2
2019.06.26	0	0	0	0
2019.07.03	0	0	1	1
+/-	-	-	▼ 1	▼ 1

Freight Market – Fixture (Source : MEIC Panel)

Supramax/Handy Fixture - VC

※ 금주 해당 사항 없음

Supramax/Handy Fixture - TC

	VSL Name	DWT	Built	DEL	REDEL	LYCN	Details	Hire(USD/day)	Charterer
Atlantic	Serene Jessica	57,275	2011	Bremen	E.Med	Ppt	Trip via Baltic int Scrap	9,100	Seacoast
	Sunset	37,334	2009	Bremen	Nemrut Bay	Ppt	Trip	9,000	CNR
	Western Paris	38,800	2015	Casablanca	E.Med	Ppt	Trip via Spanish int Petcoke	13,100	Seacoast
	Cielo Di Virgin Gorda	39,202	2015	Immingham	US Gulf	5/7 July	Trip	8,500 1st 40d, 10,500 thereafter	CNR
	SE Kelly	37,710	2018	Rio Grande	Atlantic	15 July	2/3 laden legs	12,200	CNR
F/HAUL	Fu Quan Shan	56,621	2013	Rotterdam	E.Med	8/10 July	Trip	7,750	CNR
	New Pride	58,761	2009	US Gulf	Japan	27/30 Jun	trip int.grain	19,000	Cargill
	Navios Primavera	53,464	2007	CJK	S.China	Ppt	Trip via Indonesia	7,250	CNR
Pacific	Xin Hai Tong 8	48,897	2014	CJK	China	Ppt	Trip via Indonesia	7,750	K Line
	Fareast Hope	55,628	2004	Guangzhou	Vietnam	Ppt	Trip via Indonesia	6,600	CNR
	Fareast Harmony	56,756	2012	Hong Kong	N.China	Ppt	Trip int l.Ore	10,500	White lake
	Minoan Grace	56,709	2012	Muara Pantai	WC India	5 July	trip	8000+25000(BB)	Seacoast
	Limnos	57,190	2010	Mumbai	Chittagong	Ppt	Trip via Arabian Gulf	1,250	CNR
	Sitc Taishan	58,107	2010	Qinzhou	Philippines	Ppt	Trip int Clinker	7,500	EMR
	Kanchang Naree	56,920	2011	Qinzhou	China	2 July	Trip via Vietnam	8,400	Propel Shipping
	Thurgau	32,709	2011	Salalah	Bangladesh	Ppt	Trip	9,500	Fednav
	Senorita	58,663	2008	Vietnam	S.China	Ppt	trip via indonesia	9,200	Trithom
	Nautical Madison	63,372	2018	Villaneuva	S.China	5 July	Trip	10,350	CNR

Supramax/Handy Fixtures by Region

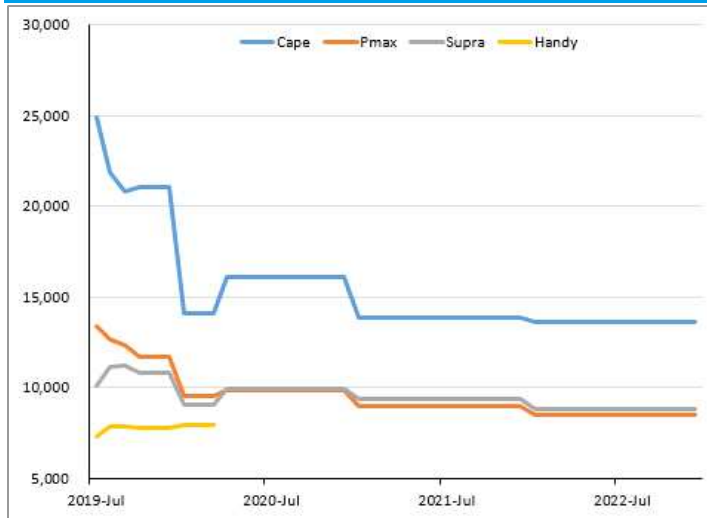
	Pacific R.V	Atlantic R.V	F/HAUL	Total
2019.June	50	24	6	80
2019.06.26	21	8	1	30
2019.07.03	7	5	1	13
+/-	▼ 14	▼ 3	-	▼ 17

Ultramax VS Supramax Fixtures

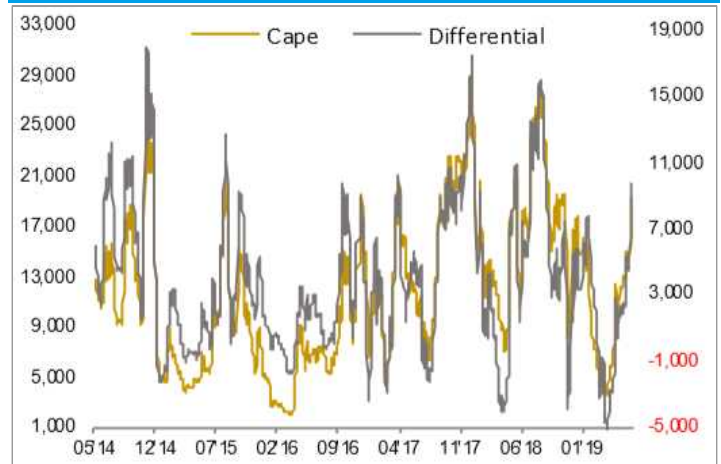
	60~63K	55~58K	Total
2019.June	24	52	76
2019.06.26	8	11	19
2019.07.03	2	12	14
+/-	▼ 6	▲ 1	▼ 5

FFA Market (Source : SSY)

Freight Forward Curve (in USD)



Cape 5TC and Cape/Pmx Differential (USD/Day)



(자료: SSY)

Capesize 180K 5TC (in USD)

Period	Bid			Offer		
	27-Jun	04-Jul	+/-	27-Jun	04-Jul	+/-
Jul 19	17,700	24,750	▲7,050	17,850	25,000	▲7,150
Aug 19	17,500	21,750	▲4,250	17,750	22,000	▲4,250
Sep 19	-	20,700	-	-	21,000	-
Q3 19	17,700	22,400	▲4,700	17,850	22,650	▲4,800
Q4 19	18,650	20,950	▲2,300	18,850	21,200	▲2,350
Q1 20	12,900	14,000	▲1,100	13,150	14,250	▲1,100
Cal 20	14,750	15,950	▲1,200	14,950	16,200	▲1,250
Cal 21	13,100	13,700	▲600	13,350	14,000	▲650

Panamax 4TC (in USD)

Period	Bid			Offer		
	27-Jun	04-Jul	+/-	27-Jun	04-Jul	+/-
Jun 19	10,700	13,300	▲2,600	9,550	13,450	▲3,900
Jul 19	10,850	12,600	▲1,750	10,800	12,700	▲1,900
Aug 19	-	12,250	-	-	12,400	-
Q3 19	10,800	12,700	▲1,900	10,900	12,800	▲1,900
Q4 19	10,750	11,700	▲950	10,850	11,800	▲950
Cal 20	8,800	9,500	▲700	8,950	9,600	▲650
Cal 21	9,300	9,800	▲500	9,350	9,900	▲550
Cal 22	8,700	8,900	▲200	8,850	9,050	▲200

Supramax 6TC (in USD)

Period	Bid			Offer		
	27-Jun	04-Jul	+/-	27-Jun	04-Jul	+/-
Jul 19	9,800	10,000	▲200	9,900	10,200	▲300
Aug 19	10,450	11,100	▲650	10,550	11,200	▲650
Sep 19	-	11,150	-	-	11,250	-
Q3 19	10,300	10,750	▲450	10,400	10,850	▲450
Q4 19	10,400	10,750	▲350	10,500	10,900	▲400
Q1 20	8,600	9,000	▲400	8,750	9,150	▲400
Cal 20	9,650	9,900	▲250	9,725	10,000	▲275
Cal 21	9,150	9,350	▲200	9,300	9,500	▲200

Handy 6TC (in USD)

Period	Bid			Offer		
	27-Jun	04-Jul	+/-	27-Jun	04-Jul	+/-
Jul 19	7,000	7,200	▲200	7,250	7,450	▲200
Aug 19	-	7,700	-	-	8,000	-
Q3 19	7,300	7,400	▲100	7,500	7,600	▲100
Q4 19	8,000	8,000	-	8,250	8,250	-
Q1 20	7,150	7,250	▲100	7,350	7,500	▲150
Cal 20	8,000	8,100	▲100	8,250	8,300	▲50

Capesize C5 Route(서호주-극동, in USD)

Period	Bid			Offer		
	27-Jun	04-Jul	+/-	27-Jun	04-Jul	+/-
Jul 19	7.35	8.55	▲1.20	7.45	8.80	▲1.35
Aug 19	-	8.20	-	-	8.60	-
Q3 19	7.25	8.30	▲1.05	7.50	8.60	▲1.10
Q4 19	8.00	8.60	▲0.60	8.50	9.00	▲0.50
Cal 20	7.50	8.20	▲0.70	8.25	8.70	▲0.45

Panamax 3A Route(T/P R.V, in USD)

Period	Bid			Offer		
	27-Jun	04-Jul	+/-	27-Jun	04-Jul	+/-
Jul 19	9,750	11,650	▲1,900	10,100	12,050	▲1,950
Aug 19	-	11,200	-	-	11,600	-
Q3 19	9,750	11,250	▲1,500	10,100	11,650	▲1,550
Q4 19	9,900	11,000	▲1,100	10,300	11,400	▲1,100
Cal 20	8,550	9,550	▲1,000	8,900	9,950	▲1,050

Commodity – Spot Price (Source : Global Market Focus, USDA)

Iron Ore Price				Unit: USD/Ton
Date/Type	N.China 58%		Aus 62%	Brazil 65%
	CFR		CIF	CIF
2017	59.08		71.61	87.14
2018	57.44		69.58	90.20
2019-May	91.18		100.15	115.60
2019-June	101.40		108.94	123.47
M-o-M	▲ 10.22		▲ 8.79	▲ 7.87
27-June	108.35		116.70	129.00
4-July	112.35		122.50	132.00
+/-	▲ 4.00		▲ 5.80	▲ 3.00

Coal Price						Unit: USD/Ton
Date/Type	Steam Coal				Coaking Coal	
	A.R.A	Richards Bay	Newcastle	Kalimantan	Aus Premium	China Premium
	CIF	FOB	FOB	FOB	FOB	CFR
2017	83.73	72.84	88.41	75.97	188.58	188.83
2018	91.83	78.00	106.95	78.25	207.20	208.43
2019-May	57.08	56.21	78.37	69.82	207.77	209.59
2019-June	48.36	50.86	69.17	66.95	197.59	203.45
M-o-M	▼ 8.72	▼ 5.35	▼ 9.20	▼ 2.87	▼ 10.18	▼ 6.14
21-June	45.81	49.92	68.56	66.83	196.40	203.70
28-June	48.13	51.32	67.05	66.77	195.45	200.35
+/-	▲ 2.32	▲ 1.40	▼ 1.51	▼ 0.06	▼ 0.95	▼ 3.35

Grain Price				Unit: US \$ /bu, 1,000 tons				
Grain Spot Price (Chicago Mercantile Exchange, US \$ /bu)				The U.S Grain Export Volume (,000 tons)				
Date	Soybeans	Wheat	Com	Type	Soybeans	Wheat	Com	Total
2017	953.19	421.87	336.23	May	542.73	712.85	1101.51	2357.09
2018	892.57	490.08	335.06	30-May	565.86	747.25	769.97	2083.08
27-June	855.25	555.00	425.00	6-June	758.97	380.10	888.60	2027.68
3-July	852.25	522.00	417.25	13-June	736.54	430.96	640.92	1808.42
				20-June	725.08	418.50	696.39	1839.97
+/-	▼ 3.00	▼ 33.00	▼ 7.75	+/-	▼ 11.46	▼ 12.46	▲ 55.47	▲ 31.55

Commodity – Futures (Source : SSY, Barchart)

Iron Ore Futures

Type	27-June			4 July			(B-A)
	Bid	Offer	Mid (A)	Bid	Offer	Mid (B)	+/-
Jul 19	111.90	112.10	112.00	120.55	120.75	120.65	▲ 8.90
Aug 19	107.80	108.00	107.90	113.65	113.85	113.75	▲ 6.85
Sep 19	104.45	104.65	104.55	109.05	109.25	109.15	▲ 5.75
Q3 19	108.05	108.25	108.15	114.42	114.62	114.52	▲ 7.17
Q4 19	98.95	99.15	99.05	102.20	102.40	102.30	▲ 4.05
Q1 20	92.75	92.95	92.85	95.60	95.80	95.70	▲ 3.35
Cal 20	86.70	87.10	86.90	88.60	89.00	88.80	▲ 2.20
Cal 21	76.45	76.85	76.65	76.70	77.10	76.90	▲ 0.90
Cal 22	70.95	71.35	71.15	70.70	71.10	70.90	▲ 0.65

Steam Coal Futures

Unit: USD/Ton

Type	Newcastle			Richards Bay			Rotterdam		
	27-June	27-June	+/-	20-June	27-June	+/-	20-June	27-June	+/-
Jul 19	67.15	77.00	▲ 9.85	62.90	66.25	▲ 3.35	49.30	55.30	▲ 6.00
Aug 19	68.70	77.45	▲ 8.75	63.00	66.25	▲ 3.25	51.55	57.10	▲ 5.55
Sep 19	70.15	77.85	▲ 7.70	63.05	66.70	▲ 3.65	53.50	58.30	▲ 4.80
Oct 19	71.50	77.90	▲ 6.40	63.85	67.90	▲ 4.05	55.50	59.70	▲ 4.20
Nov 19	72.35	79.45	▲ 7.10	64.35	68.80	▲ 4.45	56.65	60.60	▲ 3.95
Dec 19	73.35	80.40	▲ 7.05	65.00	69.70	▲ 4.70	57.95	62.10	▲ 4.15
Jan 20	74.60	80.35	▲ 5.75	65.50	69.95	▲ 4.45	59.45	63.20	▲ 3.75
Feb 20	-	80.45	-	-	70.20	-	-	64.00	-

Grain FFA Price-CBOT, \$ ¢/bu

	Del Date	2019.07	2019.08	2019.09	2019.11	2020.01
Soybean	20-Jun	889.00	896.50	902.75	915.25	926.25
	27-Jun	885.25	889.38	896.25	908.75	920.50
	+/-	▼ 3.75	▼ 7.13	▼ 6.50	▼ 6.50	▼ 5.75
	Del Date	2019.07	2019.09	2019.12	2020.03	2020.05
Wheat	20-Jun	547.75	545.25	555.00	563.75	565.75
	27-Jun	518.00	514.00	525.25	537.25	542.75
	+/-	▼ 29.75	▼ 31.25	▼ 29.75	▼ 26.50	▼ 23.00
	Del Date	2019.07	2019.09	2019.12	2020.03	2020.05
Corn	20-Jun	440.50	445.75	451.75	457.50	458.75
	27-Jun	433.00	436.75	441.25	448.25	451.75
	+/-	▼ 7.50	▼ 9.00	▼ 10.50	▼ 9.25	▼ 7.00

Newbuilding Market (Source : MEIC Panel, Clarksons, 언론사종합)

Newbuilding Price

(Mil USD)

TYPE		2016	2017	2018	2019-06-27	2019-07-04	+/-	High 2019	Low 2019
CAPE	180K	43.18	42.45	46.52	50.34	50.34	-	50.34	49.22
PMAX	82K	24.42	24.69	26.77	27.75	27.75	-	28.29	27.74
	77K	23.80	23.95	25.97	26.95	26.95	-	27.31	26.90
SMAX	64K	22.77	23.06	24.97	25.67	25.67	-	26.09	25.57
	58K	22.04	22.15	23.89	24.61	24.61	-	25.11	24.56
HANDY	33K	19.42	20.23	22.30	23.07	23.07	-	23.52	22.91

Newbuilding Contract

[illegible]

Order Book

Year	Handy		Supra		Pmax		Cape		Total	
	No.	DWT(Mil)	No.	DWT(Mil)	No.	DWT(Mil)	No.	DWT(Mil)	No.	DWT(Mil)
2019	82	2.85	116	7.09	143	11.80	86	20.61	427	42.35
2020	36	1.10	85	5.18	97	7.96	100	22.79	318	37.03
2021+	3	0.11	21	1.31	14	1.18	27	6.54	65	9.13
Total	121	4.07	222	13.57	254	20.94	213	49.94	810	88.52

Fleet Changes

	2016		2017		2018	
	No.	DWT(Mil)	No.	DWT(Mil)	No.	DWT(Mil)
Delivery (A)	563	47.03	456	38.31	283	27.33
Cape	104	19.96	75	15.32	50	13.94
Pmax	114	9.42	109	8.84	66	5.48
Supra	217	13.18	178	10.76	87	5.18
Handy	128	4.47	94	3.39	80	2.73
Demolition (B)	397	28.41	221	14.77	60	4.23
Cape	76	12.99	33	6.38	16	2.76
Pmax	111	7.98	50	3.60	3	0.21
Supra	95	4.26	68	3.13	15	0.67
Handy	115	3.18	70	1.66	26	0.59
Net Change (A-B)	166	18.63	235	23.54	223	23.10
End Year	10,882	796.16	11,117	819.70	11,336	842.80
Cape	1,660	316.38	1,702	325.32	1,732	336.50
Pmax	2,468	197.72	2,527	202.96	2,590	208.22
Supra	3,444	188.26	3,554	195.89	3,626	200.40
Handy	3,310	93.81	3,334	95.53	3,388	97.67
Changes (DWT, %)		2.4%		3.0%		2.82%

Sale & Purchase Market (Source : MEIC Panel, Clarksons, 언론사종합)

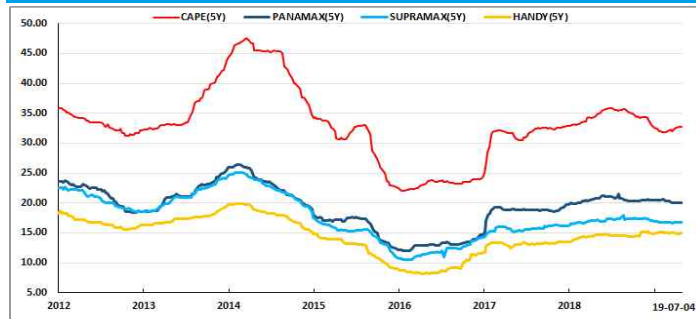
Secondhand Price

(Mil USD)

	TYPE	2016	2017	2018	2019-06-27	2019-07-04	+/-	High 2019	Low 2019
CAPE (180K)	Resale	35.20	41.13	48.07	50.60	50.63	▲ 0.03	50.71	50.41
	5Y	23.14	30.04	34.32	32.67	32.68	▲ 0.01	34.37	31.79
	10Y	13.03	19.54	23.33	22.57	22.60	▲ 0.03	24.17	22.38
PMAX (77K)	Resale	21.84	25.02	26.50	26.90	26.90	-	27.47	26.63
	5Y	12.89	17.90	20.31	20.08	20.10	▲ 0.02	20.58	20.05
	10Y	7.49	12.04	14.48	12.79	12.76	▼ 0.03	13.95	12.51
SMAX (58K)	Resale	19.37	23.46	25.18	25.42	25.41	▼ 0.01	25.79	25.36
	5Y	11.71	15.30	16.94	16.79	16.78	▼ 0.01	17.44	16.60
	10Y	7.16	10.83	12.95	12.42	12.50	▲ 0.08	13.19	12.30
HANDY (33K)	Resale	16.15	19.11	22.06	22.76	22.76	-	22.86	22.47
	5Y	8.86	12.79	14.24	14.94	14.95	▲ 0.01	15.31	14.39
	10Y	5.99	7.78	10.24	10.28	10.28	-	10.95	10.16

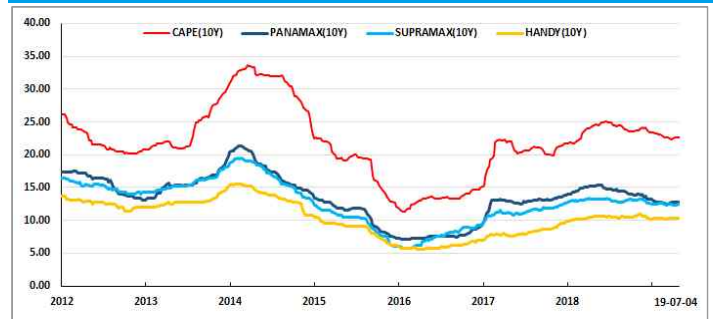
5Y Old Price

(Mil. USD)



10Y Old Price

(Mil USD)

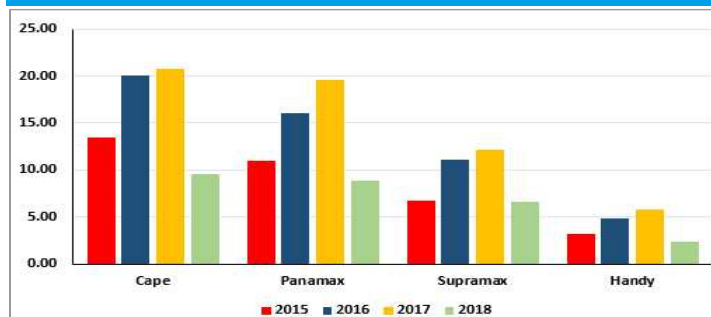


Secondhand Record

Name	DWT	Built	Shipbuilder	Buyer	Price(Mil USD)/Ship		
Mineral Noble	170,649	2004	Hyundai	S.Korea	-	-	13.50
Tai Progress	77,800	2004	CSBC Kaohsiung	Taiwan	Unknown Chinese	China	7.50
ES Sakura	76,600	2007	Imabari	Japan	-	-	11.50
Crystal Wind	76,523	2009	Shin Kasado	Japan	Safety Management	Greece	13.20
Banzai	74,222	2002	Namura Imari	Japan	Unknown Chinese	China	7.00
Tomini Victory	57,000	2012	Yangzuo Guoyu	China	-	-	10.80
Pistis	52,400	2004	Tadotsu Tsuneishi	Japan	Unknown Chinese	China	7.50
Odigitria	46,509	2001	Mitsui	Japan	Unknown Chinese	China	5.50
Daiwan Brave	34,400	2014	Namura	Japan	Unknown Greek	Greece	15.50
Daiwan Ace	34,358	2014	Namura	Japan	Unknown Greek	Greece	15.30
Gea	33,562	2005	Shin Kurushima	Japan	Janchart	Denmark	6.85
IVS Knot	33,100	2010	Kanda	Japan	Unknown Japanese	Japan	13.00
Allstars	28,520	2000	Imabari	Japan	Unknown Chinese	China	4.50
King Canola	28,207	2013	Imabari	Japan	Newport SA	Greece	8.40

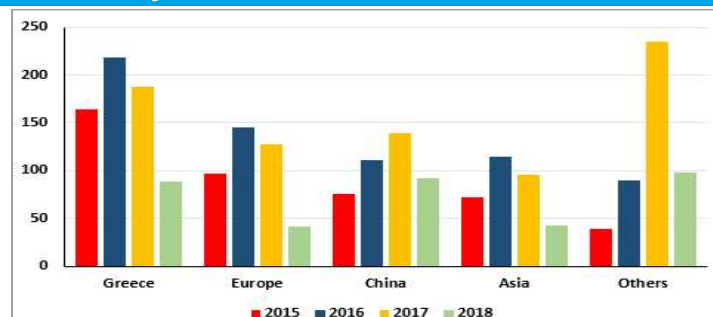
SnP Deal Volume

(Mil. DWT)



SnP Buyer

(No. of Record)



*Others에는 unknown 포함임

Demolition Market (Source : MEIC Panel, Clarksons, 언론사종합)

Demolition

TYPE	2016		2017		2018		2019 Jan	
	No.	DWT(Mil)	No.	DWT(Mil)	No.	DWT(Mil)	No.	DWT(Mil)
CAPE	76	12.99	33	6.38	16	2.76	2	0.38
PMAX	111	7.98	50	3.60	3	0.21	1	0.07
SMAX	95	4.26	68	3.13	15	0.67	0	0.00
HANDY	115	3.18	70	1.66	26	0.59	2	0.06
Total	397	28.41	221	14.77	60	4.23	3	0.51

Demolition Record

Name	DWT	Built	Shipbuilder		Seller		LDT	Price (USD/LDT)	Buyer
Zhongte	246,732	1989	Mitsubishi	Japan	Maran Dry Management	Greece	36,300	425	India
Byuksang 3001	4,100	1992	Hanjin Heavy Ind	S.Korea	SHL Maritime	S.Korea	1,847	-	Bangladesh

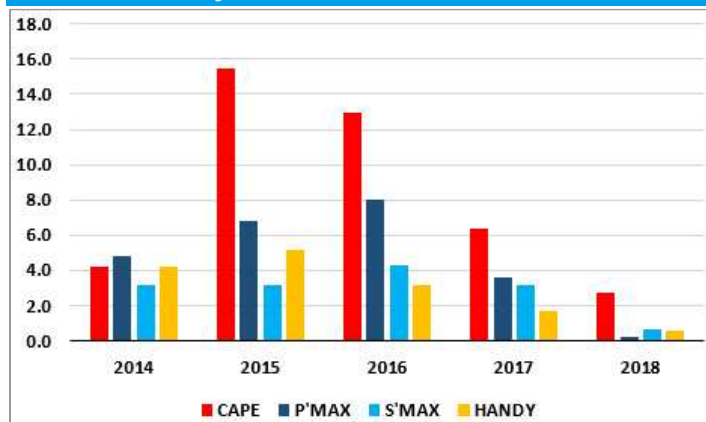
Scrap Price

(USD/LDT)

	2016	2017	2018	2019-06-27	2019-07-04	+/-	2019 High	2019 Low
Bangladesh	262	349	425	410	410	-	445	420
India	258	349	424	405	405	-	430	405
Pakistan	261	353	424	400	400	-	420	405

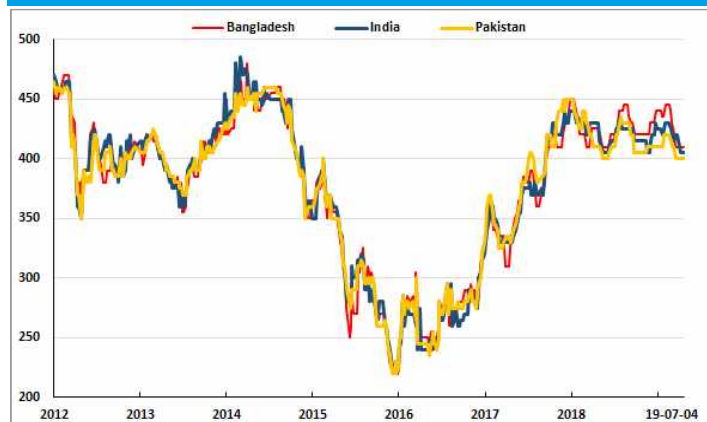
Demolition by Size

(Mil DWT)



Demolition Price Trend

(USD/LDT)



Bunker Market and Weekly News (Source : Petrosport, CME Group, 한국석유공사)

380CST Price Trend

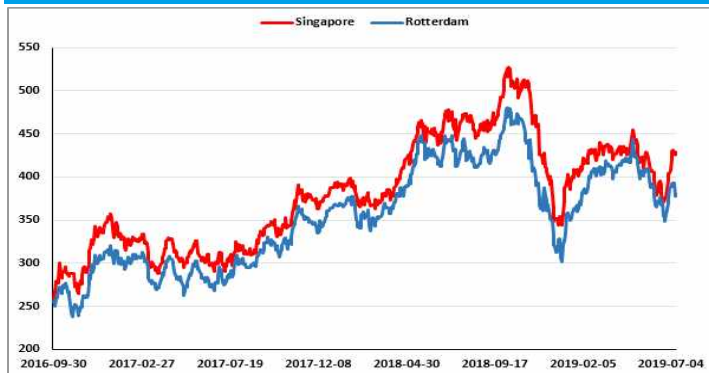
USD/Ton	380CST						
	Busan	Shanghai	Singapore	Fujairah	Panama	Rotterdam	Houston
2017	350	349	329	327	313	307	304
2018	457	451	433	432	417	401	400
27-June	429	401	376	371	361	356	352
4-July	474	426	429	396	394	381	403
+/-	▲ 45	▲ 25	▲ 53	▲ 25	▲ 33	▲ 25	▲ 51

MGO Price Trend

USD/Ton	MGO						
	Busan	Shanghai	Singapore	Fujairah	Panama	Rotterdam	Houston
2017	526	595	494	327	313	307	304
2018	669	755	637	432	417	401	400
27-June	655	-	610	703	600	574	603
4-July	669	-	587	680	605	558	600
+/-	▲ 38	-	▲ 8	▼ 13	▲ 15	▲ 7	▲ 22

380CST

(USD/Ton)



Crude FFA Market

USD/BBL	WTI		BRENT		DUBAI
	2019.08	2019.09	2019.09	2019.10	Spot
27-Jun	59.43	59.49	65.67	-	64.42
28-Jun	58.47	58.52	64.74	-	64.88
01-Jul	59.09	59.14	65.06	-	64.92
02-Jul	56.25	56.34	62.40	62.16	63.43
03-Jul	57.34	57.44	63.82	63.51	60.62
+/- (전주대비)	▼2.09	▼2.05	▼1.85	-	▼2.67

Weekly News

<2019-20 전세계 대두 수확량 전망치 하향 조정>

- ▶ 2019-20 시즌 중 전세계 대두 수확량이 3억 5,830만 톤 정도를 기록할 것이라 전망(유엔 식량농업기구)
- ▶ 이는 전월 전망치 3억6,130만 톤보다 하향 조정된 것이며, 미국과 아르헨티나 수확 감소가 배경이라 분석됨

<호주, '21년까지 철광석 가격 급락 전망>

- ▶ 62% Fe 분광의 중국 칭다오항 철광석 가격이 125.77불 기록(2일), 올해 초 대비 73% 급등 및 '14년 이후 최고가
- ▶ 그러나 올해 중국 철광석 생산량·수입량이 점차 감소함과 동시에 공급량은 평균 수준을 회복하면서 '21년 철광석 가격을 톤당 57불로 예측(호주 산업부 발표)

<아시아 시장 원료탄 가격, 하락세 계속>

- ▶ 아시아 시장에서 원료탄 Spot가격이 계속해서 하락하고 있는 것으로 나타나며,
- ▶ 중국 소비자들이 여전히 호주 원료탄 구매를 꺼리고 있기 때문에 분석, 하락세는 당분간 계속될 것으로 전망됨

<브라질 6월 철광석 수출, 전년대비 감소>

- ▶ 브라질의 지난 6월 철광석 수출이 2,939.8만 톤을 기록, 지난 해 동월의 3,529.1만 톤에 비해 16.7% 감소
- ▶ 그러나 6월 중 일일 평균 수출은 55만 톤을 기록하면서 전월의 136만 톤보다 증가한 것으로 나타남

Port Congestion Statistics (Source : Global Ports)

Port Congestion

Average Delay Days							
Date/Country	Australia	China	India	Indonesia	Brazil	S.Africa	Average
June	4.4	1.5	3.4	3.2	5.9	5.4	2.83
26-June	4.6	1.3	3.8	3.3	5.5	6.5	3.04
3-July	4.6	1.6	3.0	2.7	5.4	7.0	2.81
+/-	-	▲ 0.3	▼ 0.8	▼ 0.6	▼ 0.1	▲ 0.5	▼ 0.23

Number of Vessels Waiting at Ports (C=Cape, P=Pmx)						
Date/Country	World (C)	Brazil (C)	China (C)	S.Africa (C)	Australia (C)	Australia (P)
June	170	45	26	11	79	54
26-June	162	38	21	13	77	54
3-July	194	37	30	9	106	57
+/-	▲ 32	▼ 1	▲ 9	▼ 4	▲ 29	▲ 3

Number of vessels due at Australian Ports within next 14 days				
Date/Type	Cape	Panamax	Supramax	Handy
June	129	98	27	7
26-June	130	92	31	7
3-July	102	91	23	5
+/-	▼ 28	▼ 1	▼ 8	▼ 2

Coal Congestion Days									
Loading Ports									
Country	Australia					Indonesia			
Date/Ports	Dalrymple Bay	Gladstone	Hay Point	Newcastle (Koorang)	Port Kembla	Taboneo	Muara Pantai	Samarinda	Adang Bay
June	16.6	9.1	8.1	2.5	1.1	2.5	2.4	13.4	1.9
26-June	19	9	6.5	4	0.5	3.0	4.5	10.0	2.0
3-July	14	11.5	7	3.5	0.5	3.5	2.5	6.5	1.5
+/-	▼ 5.0	▲ 2.5	▲ 0.5	▼ 0.5	-	▲ 0.5	▼ 2.0	▼ 3.5	-

Coal Congestion Days								
Discharge Ports								
Country	China				India			
Date/Ports	Xingang (Coke)	Xingang (Coal)	Rizhao	Zhanjiang	Ennore	Mormugoa	Paradip (Thermal)	Tuticorin
June	0.0	2.3	2.4	3.5	16.4	0.5	15.9	2.0
26-June	0.0	1.5	2.0	4.0	20.0	2.0	17.0	0.0
3-July	0.0	2.5	4.0	3.5	20.5	0.0	10.5	0.0
+/-	-	▲ 1.0	▲ 2.0	▼ 0.5	▲ 0.5	▼ 2.0	▼ 6.5	-

Iron Ore Congestion Days											
Loading Ports											
Country	Australia					India	Brazil				
Date/Ports	Dampier	Geraldton	Port Hedland	Port Kembla	Port Walcott	Vizag	Guaiba Island	PDM (Pier 3, N)	PDM (Pier 3, S)	Tubarao (N. Pier 1)	Tubarao (Pier 1, S)
June	3.8	2.6	8.3	0.0	3.4	2.0	7.6	8.8	11	6.5	9.6
26-June	2.5	3.0	12.0	0.0	2.0	0.0	10.0	7.5	7.5	5.0	12.0
3-July	6.0	4.0	7.0	0.0	4.0	5.0	6.5	9.0	7.5	8.5	8.5
+/-	▲ 3.5	▲ 1.0	▼ 5.0	-	▲ 2.0	▲ 5.0	▼ 3.5	▲ 1.5	-	▲ 3.5	▼ 3.5

Iron Ore Congestion Days									
Discharge Ports									
Country	China								
Ports	Belun (Ningbo)	Qingdao	Caofeidan	Xingang (Tianjin)	Rizhao	Lanshan	Lianyungang	Bayuquan	Zhangjiang
June	1.6	2.9	1.9	2.5	0.8	3.8	1.0	3.8	3.5
26-June	1.5	1.0	0.0	2.0	3.0	3.0	0.0	3.0	4.0
3-July	2.5	2.0	2.0	2.0	2.0	4.0	2.0	3.0	3.5
+/-	▲ 1.0	▲ 1.0	▲ 2.0	-	▼ 1.0	▲ 1.0	▲ 2.0	-	▼ 0.5

KOBC Freight Panelist



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