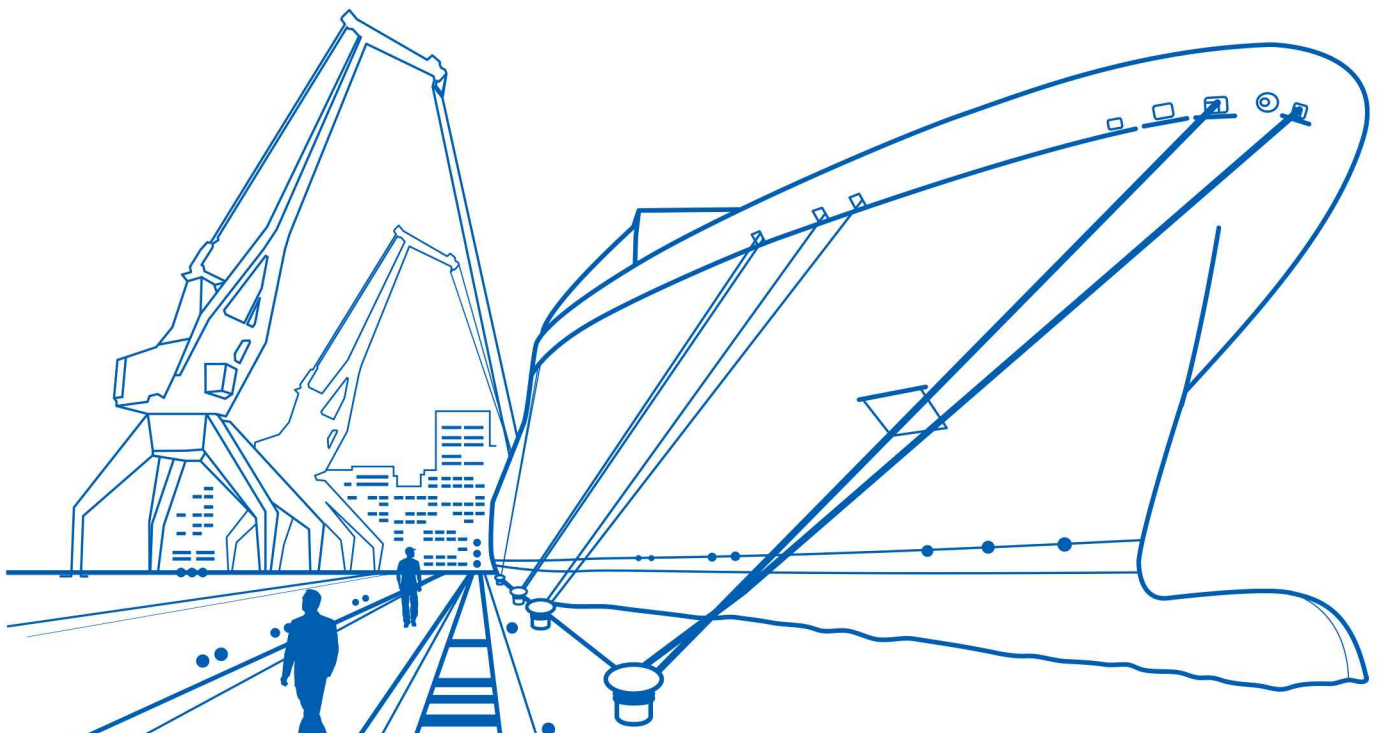


Aug 2nd 2019

KOBC DRYBULK WEEKLY REPORT



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Volume 355

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Weekly Highlight

Freight Market : Weak

Commodity Market : Weak

Supply Market : Mixed

Freight Market

- ▶ 전 선형 전 수역에 걸친 하락세 지속됨
- ▶ 철광석 확보 수요 감소에 따른 Cape의 약세가 하위 선형 전체를 압박하는 패턴
- ▶ 하계 냉방 전력 수요 증가에도 불구하고 연료탄 물동량 증가가 수반되지 않고있어, 다음주에도 전반적 조정세 예상됨

<운임 지표>

구분	2018.Avg	2019.Jul	26-July	2-Aug	+/-
Capesize	19,830	29,587	30,154	29,041	▼1,113
Panamax	12,528	14,214	16,233	14,844	▼1,389
Supramax	11,956	10,554	11,787	11,684	▼ 103
Handy	9,644	6,813	7,168	7,094	▼ 74
Average	13,490	15,292	16,336	15,666	▼ 670

(단위 : USD/day)

Commodity Market

- ▶ 철광석 가격은 중국 철강가격 약세 및 브라질의 철광석 공급 증가 전망으로 하락
- ▶ 석탄은 유럽 폭염 해소, 중국의 여유로운 자체 공급 등으로 하락
- ▶ 곡물은 주요 생산국들의 생산량 개선 전망 및 중국 대두 수요 감소 전망으로 하락

<원자재 가격 동향>

단위: USD/Ton

구분	2019.Jul	25-July	1-Aug	+/-
Iron Ore Aus 62%(CIF)	118.42	116.00	118.00	▲ 2.00
Steam Coal Newcastle(FOB)	73.04	73.74	72.04	▼ 1.70
Coking Coal Australia(FOB)	183.06	181.40	173.60	▼ 7.80
Soybean	864.38	865.00	832.75	▼32.25
Wheat	515.13	507.50	481.25	▼26.25
Corn	418.63	408.50	377.75	▼30.75

* 석탄은 19 July, 26 July 기준 가격

* 곡물 가격 단위는 US ¢/bu임

Supply Market

- ▶ 1척의 신조 거래 소식도 없었으며, 케이프사이즈 신조 선가는 상승세, 나머지 선형 신조선가는 보합세 유지
- ▶ 지난 한 주 총 14척의 중고선이 거래되었으며, 대부분 선형의 중고선가는 하락세를 보임

<선가 동향>

	구분	2018.Avg	25-July	1-Aug	+/-
NB	Capesize (180K)	46.52	50.36	50.41	▲ 0.05
	Panamax (77K)	25.97	26.95	26.95	-
	Supramax (58K)	23.89	24.55	24.55	-
	Handy (33K)	22.30	23.05	23.05	-
2nd	Capesize 5Y	34.32	32.80	32.78	▼ 0.02
	Panamax 5Y	20.31	20.42	20.44	▲ 0.02
Hand	Supramax 5Y	16.94	16.64	16.62	▼ 0.02
	Handy 5Y	14.24	14.95	14.92	▼ 0.03

(단위: Mil USD)

Freight Rate by Types

(USD/Day)



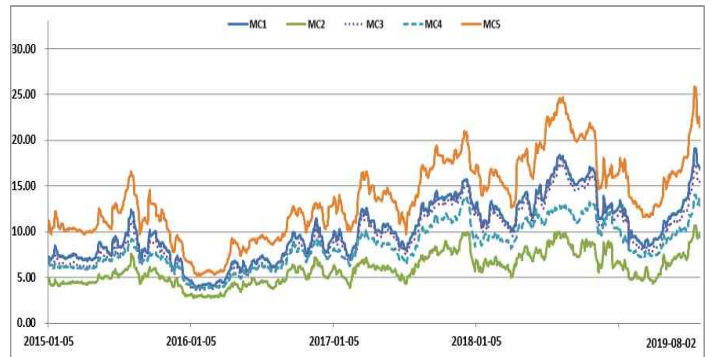
Freight Market

Capesize Market

- ▶ 중국의 철광석 항만 재고량 증가세 전환, 국제 철광석 가격 하락 등의 영향으로 철광석 확보 수요가 감소하며 하락세
- ▶ 중국의 철강 생산 마진이 계속 악화되고 있는 점도 철광석 수요를 제한함
- ▶ 다음 주에도 조정세 유지될 것으로 예상되나, 수역별 주요 화주들의 움직임에 따라 차등적인 방향성을 보일 것으로 전망

Cape VC Rate Trend

(USD/Ton)

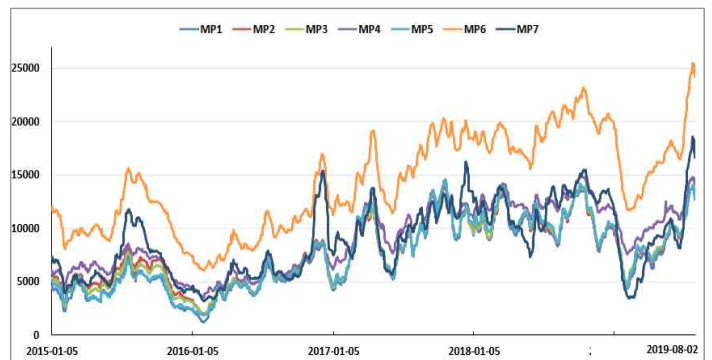


Panamax Market

- ▶ 북대서양, 동남아 등의 산발적인 수요 증가에도 불구하고 전 수역에 걸친 하락세 지속됨
- ▶ Cape 약세에 따른 견인효과 상실 및 남미 곡물 수요 둔화, Period 수요 감소 등이 약세 주도
- ▶ 그 동안 유럽 내 석탄 수요를 증가시켰던 폭염이 한풀 꺾이며 대서양 석탄 가격이 하락하고 있어, T/A 선박 수요 추가 감소 예상됨

Panamax TC Rate Trend

(USD/Day)

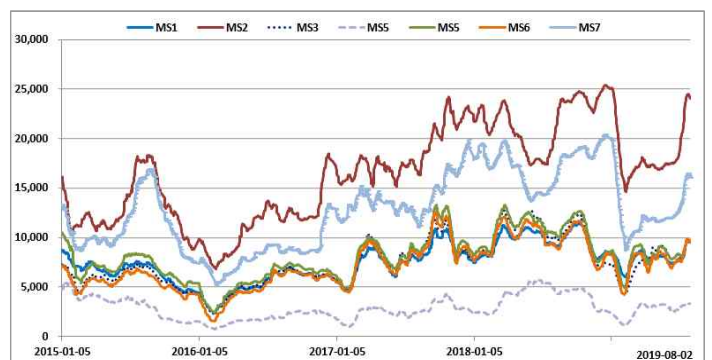


Supramax Market

- ▶ 대형선들의 하락 및 주요 수역 내 선박 공급 증가로 전 수역 하락세
- ▶ 동북아 지역 기온 상승에도 불구하고 기 확보한 전력용 연료탄 재고가 넉넉한 편이라, 연료탄 신규 확보를 위한 선박 수요는 증가하지 않음
- ▶ 수역별 수급 상황에 따라 남미 등 일부 수역에서 반등이 나타날 수 있겠으나, 전체적인 하락세를 멈출만한 펀더멘털 요인은 아직 포착되지 않음.

Supramax TC Rate Trend

(USD/Day)



Handy Market

- ▶ 지난주의 추세와 변함없이 대서양 약보합, 태평양 소폭 상승 패턴 유지됨
- ▶ 다만 대서양의 약세는 확대되고 태평양의 약한 상승세는 보합으로 전환되고 있어, 상위 선형들의 하락 압력이 전달되고 있는 것으로 보임

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.Jul	2018.08.02(A)	2019.07.26(B)	2019.08.02(C)	+/- (C-B)	+/- (C-A)
MC1	160,000MT Saldanha Bay-Qingdao	6.77	11.30	13.82	16.71	16.98	17.33	16.84	▼ 0.49	▼ 0.14
MC2	160,000MT W.Australia-Qingdao	4.44	6.66	7.59	9.32	9.63	9.31	9.39	▲ 0.08	▼ 0.24
MC3	150,000MT R.Bay-Qingdao	6.18	10.72	13.10	15.17	16.04	15.75	15.19	▼ 0.56	▼ 0.85
MC4	130,000MT Newcastle-Zhoushan	6.00	9.37	10.92	12.51	12.39	12.96	12.90	▼ 0.06	▲ 0.51
MC5	160,000MT Tubarao-Qingdao	8.95	14.98	18.34	22.28	22.81	21.93	21.40	▼ 0.53	▼ 1.41
MC6	PRC/Japan-Brazil-PRC/Japan	7,156	14,321	16,021	23,866	21,563	24,125	23,288	▼ 837	▲ 1,725
MC7	PRC/Japan-E.Australia-PRC/Japan	7,018	14,802	16,059	23,576	22,338	23,863	23,800	▼ 63	▲ 1,462
MC8	A.R.A/Gib-Bolivar-A.R.A/Gib	7,689	15,705	16,559	24,330	30,638	25,438	23,875	▼ 1,563	▼ 6,763
MC9	A.R.A/Gib-USEC/Canada-PRC/Japan	13,933	25,849	30,680	46,578	44,100	47,188	45,200	▼ 1,988	▲ 1,100
TC Average(180,000DWT)		8,949	17,669	19,830	29,587	29,660	30,154	29,041	▼ 1,113	▼ 619

Panamax TC Rate

(USD/Day)

Code	Route Description	2016.AVG	2017.AVG	2018.AVG	2019.Jul	2018.08.02(A)	2019.07.26(B)	2019.08.02(C)	+/- (C-B)	+/- (C-A)
MP1	S.PRC-Indonesia-S.PRC	4,964	9,163	10,660	11,834	9,062	13,233	11,667	▼ 1,566	▲ 2,605
MP2	F.EAST-Australia-E.C India	5,307	9,298	10,846	12,141	9,230	13,650	12,160	▼ 1,490	▲ 2,930
MP3	PRC-NOPAC or Australia-PRC	5,259	9,311	10,962	12,307	9,392	13,850	12,442	▼ 1,408	▲ 3,050
MP4	S'pore-ECSA-F.EAST	5,787	10,586	12,645	13,490	12,220	14,840	14,100	▼ 740	▲ 1,880
MP5	Busan-CIS-N.PRC	5,151	9,424	11,110	12,370	9,530	14,040	12,700	▼ 1,340	▲ 3,170
MP6	Passing Gib-USG-F.EAST	9,702	15,785	19,305	22,230	20,420	25,460	24,180	▼ 1,280	▲ 3,760
MP7	Passing Gib-USG-Skaw/Passero	6,466	10,272	12,169	15,128	13,610	18,560	16,660	▼ 1,900	▲ 3,050
TC Average(74,000DWT)		6,091	10,548	12,528	14,214	11,923	16,233	14,844	▼ 1,389	▲ 2,921

Supramax TC Rate

(USD/Day)

Code	Route Description	2016.AVG	2017.AVG	2018.AVG	2019.Jul	2018.08.02(A)	2019.07.26(B)	2019.08.02(C)	+/- (C-B)	+/- (C-A)
MS1	PRC-NOPAC or Australia-PRC	5,265	7,816	9,668	8,500	9,381	9,573	9,626	▲ 53	▲ 245
MS2	USG-S'pore/Japan	11,488	18,401	21,710	21,664	19,400	24,500	23,990	▼ 510	▲ 4,590
MS3	CJK via Indonesia/Phil - PRC (Nickel Ore)	5,287	8,443	10,351	8,562	10,038	9,492	9,708	▲ 216	▼ 330
MS4	S'pore/Japan-USG	1,819	2,563	4,079	3,140	4,990	3,340	3,296	▼ 44	▼ 1,694
MS5	S.PRC-Indonesia-EC.India	5,700	8,776	10,683	8,785	10,413	9,545	9,540	▼ 5	▼ 873
MS6	S.PRC-Indoneisa-PRC	4,961	8,226	9,805	8,578	9,209	9,692	9,610	▼ 82	▲ 401
MS7	USG-Skaw/Passero	8,310	14,048	17,400	14,646	15,270	16,370	16,020	▼ 350	▲ 750
TC Average(58,000DWT)		6,119	9,753	11,956	10,554	11,243	11,787	11,684	▼ 103	▲ 441

Handy TC Rate

(USD/Day)

Code	Route Description	2016.AVG	2017.AVG	2018.AVG	2019.Jul	2018.08.02(A)	2019.07.26(B)	2019.08.02(C)	+/- (C-B)	+/- (C-A)
MH1	F.EAST-SE Asia	5,185	6,994	8,331	6,637	8,572	6,819	6,727	▼ 92	▼ 1,845
MH2	PG/WC India-F.EAST	4,410	8,954	10,872	8,329	10,670	9,150	9,100	▼ 50	▼ 1,570
MH3	S.PRC/SE Asia-F.EAST	4,265	7,223	8,915	6,552	8,810	6,673	6,506	▼ 167	▼ 2,304
MH4	Busan-CIS-F.EAST	4,827	7,063	8,765	6,659	8,540	6,833	6,700	▼ 133	▼ 1,840
MH5	Skaw/Passero-USG-Skaw/Passero	6,283	10,066	11,335	5,890	10,663	6,363	6,438	▲ 75	▼ 4,225
TC Average(33,000DWT)		4,994	8,060	9,644	6,813	9,451	7,168	7,094	▼ 74	▼ 2,357

Freight Market – Fixture (Source : MEIC Panel)

Capesize Fixture - VC

	VSL Name	Cargo Q'ty	L/Port	D/Port	LYCN	FRT(USD/Ton)	Terms	Charterer
Atlantic	Danae	65,000/10	Mo-I-Rana	Ijmuiden	27 Jul/5 Aug	9.50	5 days shinc	TS Global
	Gloden Behike	160,000/10	Puerto Bolivar	Rotterdam	10/19 Aug	12.50	50,000shinc/25,000shinc	Cosco
F/Haul	Pigi	190,000/10	Tubarao	Qingdao	21/30 Aug	22.00	3 days shinc/30,000shinc	SwissMarine
	Orient Vesta	170,000/10	Tubarao	Qingdao	13 Aug	25.75	3 days shinc/30,000shinc	Vale
	Vangells	170,000/10	Tubarao	Qingdao	20 Aug	22.50	3 days shinc/30,000shinc	Trafigura
	CCL TBN	180,000/10	CSN	Qingdao	25 Aug	23.30	80,000shinc/30,000shinc	CSN
	NSU TBN	170,000/10	Seven Islands	Kawasaki	19/25 Aug	28.80	60,000shinc/50,000shinc	Rio Tinto
	TBN	170,000/10	Seven Islands	Qingdao	20/26 Aug	28.75	60,000shinc/30,000shinc	Rio Tinto
	LDC TBN	160,000/10	Saldanha Bay	Dangjin	20/25 Aug	17.09	90,000shinc/30,000shinc	Vale
	Aanya	170,000/10	Tubarao	Qingdao	22/24 Aug	22.85	3 days shinc/30,000shinc	Vale
	Castillo De Valverde	170,000/10	Tubarao	Qingdao	End Aug	23.00	3 days shinc/30,000shinc	Pacific Bulk
Pacific	Cosco TBN	190,000/10	W.Australia	Gwangyang	18/27 Aug	8.27	Scale/6,000shinc	Posco
	Australia Maru	170,000/10	Port Hedland	Qingdao	10/12 Aug	9.70	90,000shinc/30,000shinc	Rio Tinto
	Korona D	170,000/10	Dampier	Qingdao	10/12 Aug	9.70	90,000shinc/30,000shinc	Rio Tinto
	Parapola	170,000/10	Port Hedland	Qingdao	11/13 Aug	9.80	80,000shinc/30,000shinc	BHP
	TBN	170,000/10	Dampier	Qingdao	12/14 Aug	9.90	90,000shinc/30,000shinc	Rio Tinto
	Genco Maximus	170,000/10	W.Australia	Qingdao	12/13 Aug	10.00	80,000shinc/30,000shinc	FMG

Capesize Fixture - TC

	VSL Name	DWT	Built	DEL	REDEL	LYCN	Details	Hire(USD/day)	Charterer
Pacific	Anangel Virture	180,391	2012	Kashima	S.China	30 Jul	Trip	26,250	Jiangsu Steamship
PERIOD	Nian Feng Hai	177,878	2008	Pohang	WW	28/29 Jul	9/11 months trading	20,000	NYK
	CS Salubrity	180,301	2014	Dalian	WW	10 Aug	9/11 months trading	21,000	Koch Shipping
	Stella Cherise	177,832	2010	CJK	WW	10/13 Aug	9/11 months trading	19,500	NYK
	CHS Creation	174,110	2006	jintang	WW	1 Aug	9/11 months trading	20,000	NYK

Iron ore Route Fixtures

	W.Australia-F.East	Brazil-F.East	Total
2019.Jul	43	30	73
2019.07.24	8	5	13
2019.07.31	6	6	12
+/-	▼ 2	▲ 1	▼ 1

Major Shippers Fixtures

	Rio Tinto	BHP Billiton	FMG	Vale	Total
2019.Jul	25	5	7	12	49
2019.07.24	8	-	-	5	13
2019.07.31	5	-	1	3	9
+/-	▼ 3	-	▲ 1	▼ 2	▼ 4

Freight Market – Fixture (Source : MEIC Panel)

Panamax Fixture - VC

	VSL Name	DWT	Built	DEL	REDEL	LYCN	Details	Hire(USD/day)	Charterer
Pacific	Anangel Virture	180,391	2012	Kashima	S.China	30 Jul	Trip	26,250	Jiangsu Steamship
PERIOD	Nian Feng Hai	177,878	2008	Pohang	WW	28/29 Jul	9/11 months trading	20,000	NYK
	CS Salubrity	180,301	2014	Dalian	WW	10 Aug	9/11 months trading	21,000	Koch Shipping
	Stella Cherise	177,832	2010	CJK	WW	10/13 Aug	9/11 months trading	19,500	NYK
	CHS Creation	174,110	2006	Jintang	WW	1 Aug	9/11 months trading	20,000	NYK

Panamax Fixture - TC

	VSL Name	DWT	Built	DEL	REDEL	LYCN	Details	Hire(USD/day)	Charterer
Atlantic	Blue Wave	87,340	2011	Hamburg	Skaw-Gibraltar	1/3 Aug	2 Baltic RV	18,000	Uniper
	Thisseas	75,039	2012	Gibraltar	Skaw-Gibraltar	27 Jul	2 laden legs m/m 90/130	16,000	ADMI
	G.B Corrado	77,061	2008	ECSA	Gibraltar-Skaw	16/18 Aug	Trip	22,500	Cofco
	Ocean Dalian	75,559	2011	ECSA	Skaw-Gibraltar	22 Jul	Trip	22,000	Cofco
	Yasa H. Mulla	83,482	2011	PDM	Gibraltar	10/15 Aug	Trip Med	23,000	Element
	Lonic Kizuna	81,868	2015	Gibraltar	Aughinish	2 Aug	Trip via Trombetas	19,500	Norvic
	Melodia	80,554	2013	Gibraltar	Continent	27 Jul	Trip via USEC	20,000	Phaethon
F/HAUL	Peace Gem	76,433	2012	Lisbon	E.Med	Spot	Trip via USEX	15,500	Element
	Mehmet Aksoy	81,585	2012	ECSA	SE Asia	14/15 Aug	Trip	17,250+725,000(BB)	Omegra
	Aristides	82,153	2013	ECSA	S'pore/Japan	11/12 Aug	Trip	17,750+775,000(BB)	Medmar
	Presinge	81,600	2015	ECSA	S'pore/Japan	10/11 Aug	Trip	17,500+750,000(BB)	CNR
Pacific	Zoe	74,702	2013	ECSA	S'pore/Japan	14 Aug	Trip	16,750+675,000(BB)	Oldendorff
	Transatlantic	81,250	2012	Jintang	India	26 Jul	trip via Aus	13,000	Oldendorff
	Sea Empress	79,252	2012	Taeon	Korea	1 Aug	Trip via CIS	15,500	HMM
	Star Aphrodite	92,006	2011	CJK	China	24/25 Jul	Trip via E.Aus	14,000	Oldendorff
	Sasebo Glory	85,020	2016	CJK	India	26 Jul	Trip via E.Aus	16,000	CNR
	Valiant Summer	81,920	2016	Haldia	S'pore/Japan	retro 28 Jul	Trip via ECSA	16,000	Bunge
	Cglobe Danae	80,306	2010	Haldia	S'pore/Japan	Spot	Trip via ECSA	14,500	Bunge
	Adriatica Graeca	74,133	2002	CJK	India	28/29 Jul	Trip via Indonesia	12,250	PWSL
	Tai Hong 8	72,270	1999	Hong Kong	China	1 Aug	Trip via Indonesia	12,750	CNR
	Hui Zhi	71,252	1995	Xiamen	S.China	24/25 Jul	Trip via Indonesia	13,600	Tongli
	Agia Valentini	80,458	2012	Meizhou	India	27 Jul	Trip via Indonesia	13,400	CNR
	Iemessos Wind	76,500	2009	Yokohama	S'pore/Japan	2/5 Aug	Trip via Nopac	14,250	CNR
	Rapallo	75,123	2009	CJK	India	30 Jul	Trip via Nopac	12,500	CNR
	Navios Taurus	76,596	2005	Nagoya	S'pore/Japan	22 Jul	Trip via Nopac int Coal	166,000	CNR
	Vita Future	81,600	2015	Bayuquan	S'pore/Japan	25/26 July	Trip via Nopac int Coal	14,000	CNR
	Princess Athena	75,729	2004	Yantai	S.China	30 Jul	Trip via Nopac int Coal	14,000	Sinotrans
	T Ransatlantic	81,250	2012	Passing Jeju	India	29/30 Jul	Trip via Nopac int Coal	13,000	Cargill
	Taho America	81,320	2019	Oshima	WW	1/5 Aug	1 year trading	15,000	Fortune Ocean

Panamax Fixtures by Major Routes

	Indonesia R.V	E.Australia R.V	ECSA-F.EAST	Total
2019.Jul	23	17	53	93
2019.07.24	7	5	17	29
2019.07.31	4	1	7	12
+/-	▼ 3	▼ 4	▼ 10	▼ 17

Period Fixtures

	4-7M	11-14M	Other	Total
2019.Jul	3	1	9	13
2019.07.24	-	-	1	1
2019.07.31	-	-	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	Cyanyanee Naree	56,548	2012	Houston	Turkey	Ppt	Trip	15,000	XO Shipping
	Ultra Lanigan	58,032	2012	US Gulf	WC Italy	Ppt	Trip int Petcoke	16,000	CNR
	Doric Javelin	57,859	2016	Casablanca	Atlantic	Ppt	2 laden legs	13,500	Eagle Bulk
F/HAUL	Scalett Manx	63,878	2017	ECSA	S'pore/JApan	5/11 Aug	2 laden legs	16,000+600,000(BB)	Bunge
	African Griffon	61,286	2014	Paranagua	China	Ppt	Trip	15,500+550,000(BB)	Ausca Shipping
	Alam Sayang	61,410	2013	Bilbao	China	Ppt	Trip vai Baltic	23,000	CNR
	Captain Andreadis	58,760	2008	Canakkale	Philippines	Ppt	Trip via Black Sea	24,750	CNR
	Orient Grace	58,620	2012	Phu my	China	28/30 Jul	Trip via Indonesia	12,750	Pacific Success
	Medi Manila	57,903	2014	Vinh Thai	Hong Kong	26/27 Jul	Trip intSands	11,500	Fujian Ocean Shipping
Pacific	Laura	63,399	2015	Guangzhou	China	Ppt	Trip via Indonesia	11,700	CNR
	Elbabe	60,438	2015	Hamriyah	WC India	Ppt	Trip via Arabian Gulf int Limestone	18,500	Oldendorff
	Magnum Fortune	53,631	2009	Mumbai	Arabian Gulf/Japan	Ppt	2/3 laden legs	12,000	Bainbridge
	Safesea Neha II	53,389	2008	Jebel Ali	EC India	Ppt	Trip int Limestone	16,000	CNR
	Riboon	53,206	2005	Tonda	China	27/31 Jul	Trip via Nopac int Petcoke	9,350	Cobelfret
	Pretty Keel	35,248	2012	Vizag	SE Asia	Ppt	Trip	8,100	CNR
	New Aspiration	61,448	2011	Ulsan	China	4/10 Aug	Trip via USWC int Grains	10,950	CNR
	Dimi	57,045	2012	Tianjin	China-Taiwan	28/30 Jul	Trip via CIS int Steel	8,900	Oldendorff
	Sino Express	5,015	2010	Vizag	China	2/10 Aug	Trip via EC India	17,500	CNR
	shandong Hai Da	56,734	2013	Kosichang	S.China	28 Jul/2 Aug	Trip via Indonesia	11,500	CNR
	Shangdong Hai Sheng	56,532	2011	Kosichang	N.China	28 Jul/2 Aug	Trip via Indonesia int Bauxite	13,750	Huaya
	Rebea	38,880	2018	Arabian Gulf	EC India	Ppt	Trip int Fertiliser	13,250	Seacoast
	Atlantic Tramp	27,930	2013	Kakogawa	Japan	24/26 Jul	Trip via CIS	6,250	CNR
	Medi Hakata	58,078	2014	CJK	S.China opt N.China	Ppt	Trip via Philippines int Nickel Ore	11000 opt 11500	Full Glory
	Conti Peridot	57,001	2011	Qinzhou	China	Ppt	Trip via Indonesia	8,500	Midmetals
	LMZ Ariel	56,812	2012	WC India	China	Ppt	Trip int I.Ore Pellets	17,500	Bainbridge
	Eolus	53,429	2009	Chittagong	China	2/6 Aug	Trip via EC India int I.Ore	16,500	Jaldhi
	Newseas Crystal	63,548	2013	CJK	S.China	Ppt	Trip via Philippines int Nickel Ore	10,500	Goodwill
	African Raptor	61,329	2015	WC India	Messaied	Ppt	Trip int I.Ore Pellets	13,000	Bainbridge
	Friendly Seas	58,779	2008	Singapore	WC India	1/3 Aug	Trip via Indonesia	11,750	CNR
	Zhejiang 525	57,283	2011	Hong Kong	China	Ppt	Trip via Kongsichang int I.Ore	11,000	CNR
PERIOD	Aquarius Honor	56,651	2011	Ningde	S.China opt N.China	1 Aug	Trip via Philippines int Nickel Ore	10500 opt 11000	AMC
	E Tracer	56,615	2011	Hong Kong	EC India	30/31 Jul	Trip via Indonesia	9,500	CNR
	Daisy Ocean	56,563	2010	Tieshan	Chittagong	Ppt	Trip int Clinker	10,500	CNR
	Spar Spica	53,565	2005	Kaohsiung	Philippines	Ppt	Trip via Indonesia	9,000	Cargill
	E Tracer	56,615	2011	Hong Kong	WW	30/31 Jul	2/3 laden legs	10,250	Century Scope

Supramax/Handy Fixtures by Region

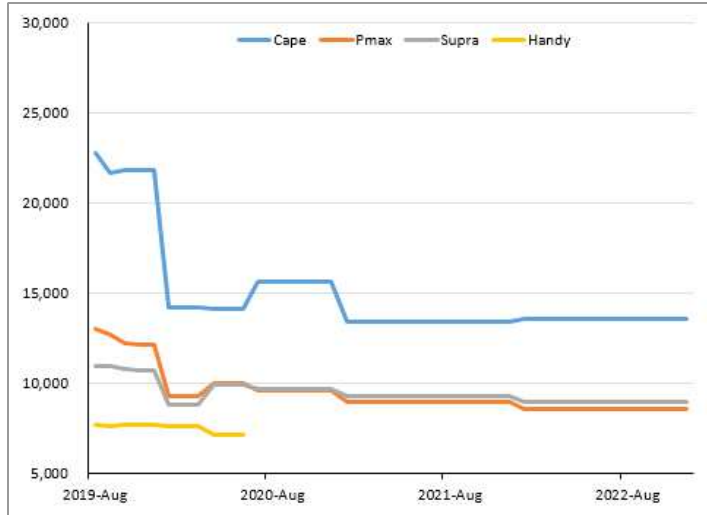
	Pacific R.V	Atlantic R.V	F/HAUL	Total
2019.Jul	77	18	12	107
2019.07.24	15	1	3	19
2019.07.31	19	3	2	24
+/-	▲ 4	▲ 2	▼ 1	▲ 5

Ultramax VS Supramax Fixtures

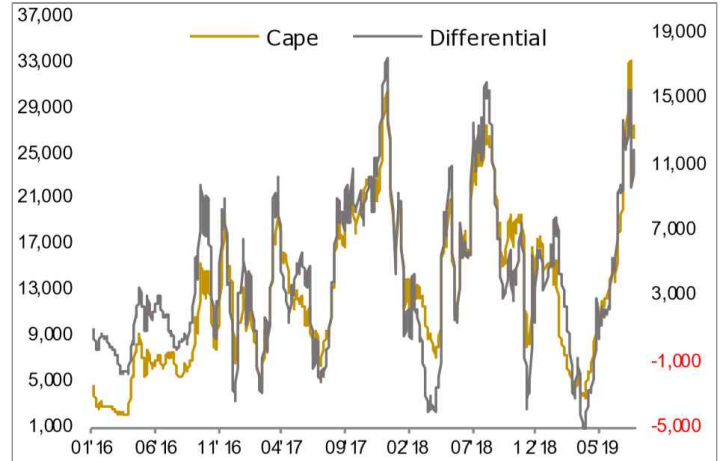
	60~63K	55~58K	Total
2019.Jul	30	52	82
2019.07.24	5	4	9
2019.07.31	8	18	26
+/-	▲ 3	▲ 14	▲ 17

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		
	25-Jul	1-Aug	+/-	25-Jul	1-Aug	+/-
19-Aug	23,700	22,650	▼1,050	23,900	23,000	▼900
19-Sep	22,500	21,500	▼1,000	22,700	21,800	▼900
19-Oct	-	21,600	-	-	22,000	-
Q4 19	22,250	21,750	▼500	22,750	22,000	▼750
Q1 20	14,600	14,100	▼500	14,900	14,350	▼550
Q2 20	-	14,000	-	-	14,250	-
Cal 20	16,100	15,550	▼550	16,400	15,700	▼700
Cal 21	13,700	13,350	▼350	14,000	13,500	▼500

Panamax 4TC (in USD)

Period	Bid			Offer		
	25-Jul	1-Aug	+/-	25-Jul	1-Aug	+/-
19-Aug	14,400	13,000	▼1,400	14,550	13,100	▼1,450
19-Sep	13,700	12,650	▼1,050	13,800	12,750	▼1,050
19-Oct	-	12,150	-	-	12,250	-
Q4 19	12,800	12,100	▼700	12,900	12,200	▼700
Q1 20	9,700	9,250	▼450	9,850	9,350	▼500
Q2 20	-	9,950	-	-	10,050	-
Cal 20	10,000	9,550	▼450	10,150	9,650	▼500
Cal 21	8,950	8,900	▼50	9,100	9,000	▼100

Supramax 10TC (in USD)

Period	Bid			Offer		
	25-Jul	1-Aug	+/-	25-Jul	1-Aug	+/-
19-Aug	11,450	10,900	▼550	11,600	11,050	▼550
19-Sep	11,350	10,900	▼450	11,500	11,000	▼500
19-Oct	-	10,750	-	-	10,900	-
Q4 19	10,900	10,700	▼200	11,050	10,800	▼250
Q1 20	8,900	8,700	▼200	9,150	8,850	▼300
Q2 20	-	9,850	-	-	10,000	-
Cal 20	9,850	9,600	▼250	10,000	9,750	▼250
Cal 21	9,300	9,200	▼100	9,450	9,350	▼100

Handy 6TC (in USD)

Period	Bid			Offer		
	25-Jul	1-Aug	+/-	25-Jul	1-Aug	+/-
19-Aug	7,700	7,600	▼100	7,900	7,800	▼100
19-Sep	7,800	7,550	▼250	8,000	7,700	▼300
19-Oct	-	7,600	-	-	7,800	-
Q4 19	7,900	7,550	▼350	8,150	7,700	▼450
Q1 20	7,150	7,050	▼100	7,350	7,200	▼150
Q2 20	-	7,950	-	-	8,150	-
Cal 20	8,000	7,750	▼250	8,250	7,900	▼350
Cal 21	7,800	7,600	▼200	8,000	7,800	▼200

Capesize C5 Route(서호주-극동, in USD)

Period	Bid			Offer		
	18-Jul	25-Jul	+/-	18-Jul	25-Jul	+/-
Aug 19	8.90	9.00	▲0.10	9.35	9.25	▼0.10
Sep 19	8.50	8.80	▲0.30	9.00	9.10	▲0.10
Q4 19	8.40	8.80	▲0.40	8.70	9.10	▲0.40
Q1 20	-	8.10	-	-	8.40	-
Cal 20	8.20	8.20	-	8.70	8.60	▼0.10

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

Period	Bid			Offer		
	18-Jul	25-Jul	+/-	18-Jul	25-Jul	+/-
Aug 19	12,650	11,800	▼850	13,150	12,300	▼850
Sep 19	-	11,150	-	-	11,650	-
Q4 19	11,050	10,600	▼450	11,550	11,100	▼450
Q1 20	8,750	8,450	▼300	9,250	8,950	▼300
Cal 20	8,550	8,800	▲250	8,900	9,300	▲400

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-Jun	101.40		108.94	123.47
2019-Jul	109.36		118.42	129.70
M-o-M	▲ 8.88		▲ 10.25	▲ 6.81
25-July	108.05		116.00	124.00
1-Aug	102.50		118.00	126.00
+/-	▼ 5.55		▲ 2.00	▲ 2.00

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-Jun	48.36	50.86	69.17	66.95	197.59	203.45	
2019-Jul	57.97	53.86	73.04	66.31	183.06	190.53	
M-o-M	▲ 9.61	▲ 3.00	▲ 3.87	▼ 0.64	▼ 14.53	▼ 12.93	
19-July	59.19	53.54	73.74	66.16	181.40	190.90	
26-July	61.32	54.21	72.04	65.72	173.60	187.75	
+/-	▲ 2.13	▲ 0.67	▼ 1.70	▼ 0.44	▼ 7.80	▼ 3.15	

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	Jul	737.10	491.37	629.54	1858.01
2018	892.57	490.08	335.06	4-July	692.39	659.15	1135.83	2487.37
25-July	865.00	507.50	408.50	11-July	908.96	286.37	682.44	1877.76
1-Aug	832.75	481.25	377.75	18-July	637.50	496.05	578.59	1712.14
				25-July	921.28	409.68	704.13	2035.10
+/-	▼ 32.25	▼ 26.25	▼ 30.75	+/-	▲ 283.78	▼ 86.37	▲ 125.54	▲ 322.95

Commodity – Futures (Source : SSY, Barchart)

Iron Ore Futures

Type	25-July			1-Aug			(B-A)
	Bid	Offer	Mid (A)	Bid	Offer	Mid (B)	+/-
Aug 19	119.55	119.75	119.65	111.65	111.85	111.75	▼ 0.95
Sep 19	112.60	112.80	112.70	107.00	107.20	107.10	▼ 0.80
Oct 19	107.80	108.00	107.90	103.10	103.30	103.20	-
Q4 19	113.32	113.52	113.42	99.60	99.80	99.70	▼ 0.70
Q1 20	100.30	100.50	100.40	91.37	91.57	91.47	▼ 1.56
Q2 20	92.93	93.13	93.03	85.43	85.63	85.53	-
Cal 20	86.01	86.41	86.21	83.75	84.15	83.95	▼ 2.26
Cal 21	75.25	75.65	75.45	72.53	72.93	72.73	▼ 2.72
Cal 22	69.25	69.65	69.45	66.70	67.10	66.90	▼ 2.55

Steam Coal Futures

Unit: USD/Ton

Type	Newcastle			Richards Bay			Rotterdam		
	25-July	1-Aug	+/-	25-July	1-Aug	+/-	25-July	1-Aug	+/-
Aug 19	74.65	69.45	▼ 5.20	65.90	63.70	▼ 2.20	61.45	58.55	▼ 2.90
Sep 19	75.50	72.70	▼ 2.80	66.05	64.10	▼ 1.95	62.40	59.50	▼ 2.90
Oct 19	76.20	73.85	▼ 2.35	67.15	65.20	▼ 1.95	63.55	60.75	▼ 2.80
Nov 19	77.20	74.80	▼ 2.40	68.35	66.00	▼ 2.35	64.05	62.15	▼ 1.90
Dec 19	78.50	75.75	▼ 2.75	69.85	66.50	▼ 3.35	65.30	63.70	▼ 1.60
Jan 20	79.25	77.25	▼ 2.00	70.70	68.95	▼ 1.75	66.35	64.95	▼ 1.40
Feb 20	79.80	77.90	▼ 1.90	71.40	70.05	▼ 1.35	67.05	65.50	▼ 1.55
Mar 20	-	78.25	-	-	70.85	-	-	66.10	-

Grain FFA Price-CBOT, \$ ¢/bu

	Del Date	2019.08	2019.09	2019.11	2020.01	2020.03
Soybean	25-Jul	883.50	888.25	900	913.75	924.75
	1-Aug	850.75	856.50	869.25	882.50	895.50
	+/-	▼ 32.75	▼ 31.75	▼ 30.75	▼ 31.25	▼ 29.25
	Del Date	2019.09	2019.12	2020.03	2020.05	2020.07
Wheat	25-Jul	499.75	507.50	518.00	523.75	525.00
	1-Aug	480.00	484.50	495.25	501.00	504.25
	+/-	▼ 19.75	▼ 23.00	▼ 22.75	▼ 22.75	▼ 20.75
	Del Date	2019.09	2019.12	2020.03	2020.05	2020.07
Corn	25-Jul	418.75	427.50	437.25	441.00	444.00
	1-Aug	395.25	404.50	415.25	421.50	426.00
	+/-	▼ 23.50	▼ 23.00	▼ 22.00	▼ 19.50	▼ 18.00

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

Newbuilding Price									(Mil USD)
TYPE		2016	2017	2018	2019-07-25	2019-08-01	+/-	High 2019	Low 2019
CAPE	180K	43.18	42.45	46.52	50.36	50.41	▲ 0.05	50.41	49.22
	82K	24.42	24.69	26.77	27.75	27.80	▲ 0.05	28.29	27.74
PMAx	77K	23.80	23.95	25.97	26.95	26.95	-	27.31	26.90
	64K	22.77	23.06	24.97	25.66	25.66	-	26.09	25.57
SMAx	58K	22.04	22.15	23.89	24.55	24.55	-	25.11	24.55
	33K	19.42	20.23	22.30	23.05	23.05	-	23.52	22.91

Newbuilding Contract							
DWT	Delivery	Shipbuilder	Buyer	No.	Price(Mil. USD)/Ship		
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-

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)

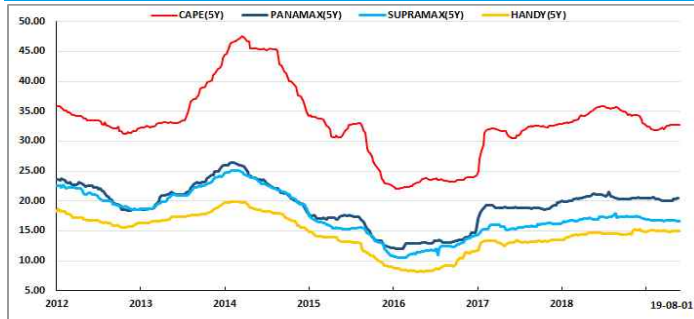
Secondhand Price

(Mil USD)

	TYPE	2016	2017	2018	2019-07-25	2019-08-01	+/-	High 2019	Low 2019
CAPE (180K)	Resale	35.20	41.13	48.07	50.84	50.95	▲ 0.11	50.95	50.41
	5Y	23.14	30.04	34.32	32.80	32.78	▼ 0.02	34.37	31.79
	10Y	13.03	19.54	23.33	22.82	22.75	▼ 0.07	24.17	22.38
PMAX (77K)	Resale	21.84	25.02	26.50	26.98	26.98	-	27.47	26.63
	5Y	12.89	17.90	20.31	20.42	20.44	▲ 0.02	20.58	20.05
	10Y	7.49	12.04	14.48	12.85	12.80	▼ 0.05	13.95	12.51
SMAX (58K)	Resale	19.37	23.46	25.18	25.43	25.55	▲ 0.12	25.79	25.36
	5Y	11.71	15.30	16.94	16.64	16.62	▼ 0.02	17.44	16.60
	10Y	7.16	10.83	12.95	12.26	12.13	▼ 0.13	13.19	12.13
HANDY (33K)	Resale	16.15	19.11	22.06	22.75	22.75	-	22.86	22.47
	5Y	8.86	12.79	14.24	14.95	14.92	▼ 0.03	15.31	14.39
	10Y	5.99	7.78	10.24	10.18	9.97	▼ 0.21	10.95	9.97

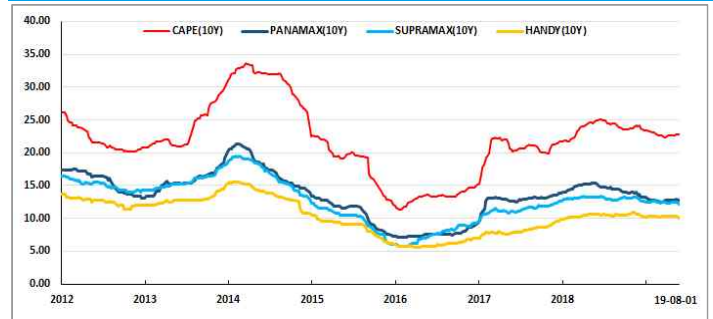
5Y Old Price

(Mil. USD)



10Y Old Price

(Mil USD)

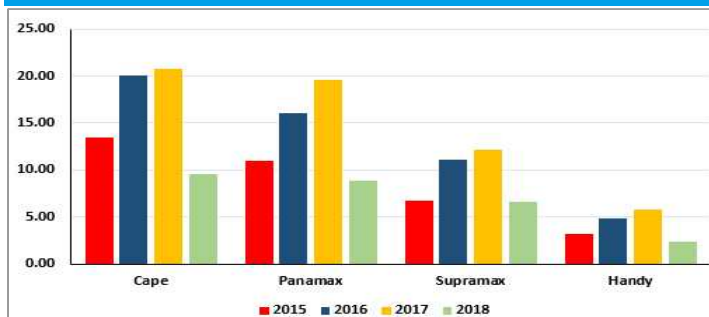


Secondhand Record

Name	DWT	Built	Shipbuilder	Buyer	Price(Mil USD)/Ship		
Nord Destiny	83,684	2008	Sanoyas	Japan	Unknown Greek	Greece	14.00
Eternal Grace	76,585	2006	Imabari	Japan	Unknown Chinese	China	9.60
Nirefs	75,311	2001	Samho	S.Korea	Castor	Greece	6.71
Zhoushan Changhong CHB044	64,000	2019	Zhoushan Changhong	China	Oman Shipping	Oman	23.00
Zhoushan Changhong CHB045	64,000	2019					23.00
GH Rough Habit	63,500	2012	Yangzhou Dayang	China	GriegMaas	Norway	16.60
Sinar Kapuas	57,374	2011	STX	S.Korea	Unknown Chinese	China	11.00
Blue Cat	57,000	2009	Zhejiang Zhenghe	China	Unknown Greek	Greece	9.00
MIA-S	56,835	2010	Hantong	China	-	-	10.20
Sheffield	55,783	2010	Hyundai-Vinashin	Vietnam	Unknown Greek	Greece	21.00
Peterborough	55,783	2009					
Genco Challenger	28,400	2003	Imabari	Japan	Unknown Vietnamese	Vietnam	5.20
Haruka	28,392	2011	I-S	Japan	-	-	7.00
Pacific Venus	18,712	2001	Hakata	Japan	-	-	4.50

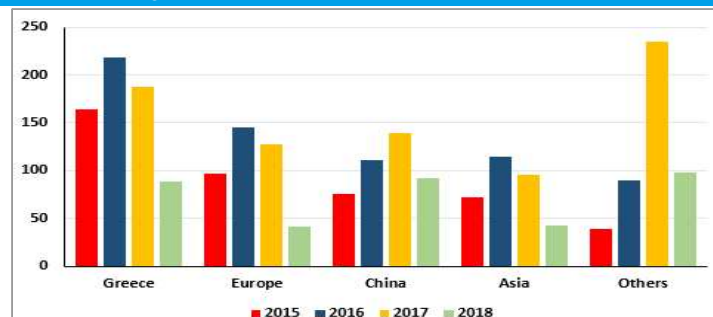
SnP Deal Volume

(Mil. DWT)



SnP Buyer

(No. of Record)



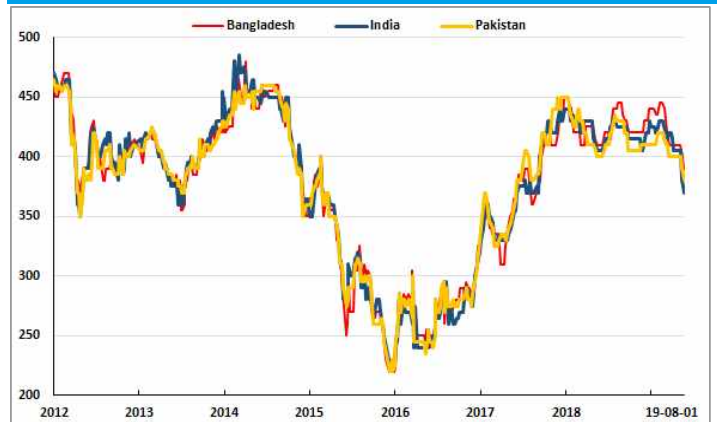
*Others에는 unknown 포함임

Demolition

Demolition Record

Scrap Price	(USD/LDT)
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Demolition by Size	(Mil DWT)	Demolition Price Trend	(USD/LDT)
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Bunker Market and Weekly News (Source : Petrosport, CME Group, 한국석유공사)

380CST Price Trend

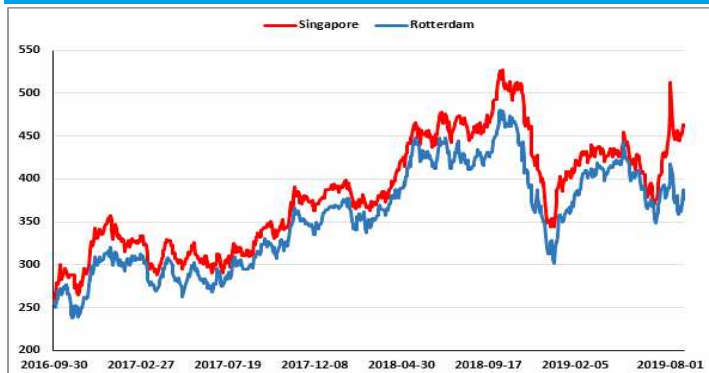
USD/Ton	380CST						
	Busan	Shanghai	Singapore	Fujairah	Panama	Rotterdam	Houston
2017	350	349	329	327	313	307	304
2018	457	451	433	432	417	401	400
25-July	451	515	444	408	373	365	377
1-Aug	494	525	461	434	387	375	377
+/-	▲ 43	▲ 10	▲ 17	▲ 26	▲ 14	▲ 10	-

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
25-July	674	-	605	690	600	570	605
1-Aug	684	-	628	689	615	576	615
+/-	▲ 10	-	▲ 23	▼ 1	▲ 15	▲ 6	▲ 10

380CST

(USD/Ton)



Crude FFA Market

USD/BBL	WTI		BRENT		DUBAI
	2019.09	2019.10	2019.09	2019.10	Spot
25-Jul	56.02	56.16	63.39	63.26	63.03
26-Jul	56.20	56.33	63.46	63.37	62.83
29-Jul	56.87	56.96	63.71	63.62	62.53
30-Jul	58.05	58.11	64.72	64.63	63.63
31-Jul	58.58	58.63	64.72	65.05	64.57
1-Aug	53.95	54.01	64.72	60.50	63.05
+/- (전주대비)	▼2.07	▼2.15	▲1.33	▼2.76	▲0.02

Weekly News

<브라질 7월 옥수수 수출, 사상 최대>

- ▶ 브라질 옥수수 수확 호조와 미국산 옥수수 수출가 상승으로 브라질의 7월 옥수수 수출이 사상 최대치를 기록
- ▶ 브라질 무역부에 따르면 지난 7월 중 631.7만 톤을 기록하며 전월에 비해 361.5%, 전년동월대비 439.8% 급증

<중국, 상반기 수요호조로 인한 철강 생산 증가>

- ▶ 중국 국내 수요가 강력한 모습을 보이면서 상반기 중 철강 생산이 호조를 보임
- ▶ 중국 선철생산은 상반기 중 4억400만 톤을 기록하며 전년동기대비 7.9% 증가했으며, 중국내 소비 증가가 가장 큰 배경으로 분석됨

<EU 2019-20 소맥 생산, 전년대비 증가 전망>

- ▶ 2019-20 시즌 중 유럽연합(EU)의 소맥 생산량이 1억 4,950만 톤을 기록, 지난 시즌 대비 9% 증가할 전망
- ▶ 고온 건조한 날씨로 EU생산량이 1억5,130만 톤 정도를 기록할 것이라는 미 농무부 해외농업국 공식 전망치보다는 소폭 낮은 수준

<아시아 시장, 원료탄 가격 급락>

- ▶ 아시아 시장에서 원료탄 Spot가격이 급락한 것으로 나타나며, 호주 QLD주 강점결탄 가격이 170불 이하로 하락
- ▶ 이는 중국 Hebei지역의 석탄 수입 제한과 관련하여 중국의 원료탄 수입이 현저하게 감소할 것이라는 예상으로 원료탄 Spot구매를 꺼리고 있는 때문으로 분석됨

Port Congestion Statistics (Source : Global Ports)

Port Congestion

Average Delay Days							
Date/Country	Australia	China	India	Indonesia	Brazil	S.Africa	Average
Jul	4.1	1.8	2.8	2.4	4.7	4.6	2.57
24-July	3.5	1.9	2.4	1.8	3.9	4.5	2.37
31-July	4.3	2.1	2.9	2.5	4.2	4.8	2.79
+/-	▲ 0.8	▲ 0.2	▲ 0.5	▲ 0.7	▲ 0.3	▲ 0.3	▲ 0.42

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)	
Jul	151	30	32	8	73	45	
24-July	137	24	32	17	64	40	
31-July	147	30	33	6	68	29	
+/-	▲ 10	▲ 6	▲ 1	▼ 11	▲ 4	▼ 11	

Number of vessels due at Australian Ports within next 14 days				
Date/Type	Cape	Panamax	Supramax	Handy
Jul	118	107	23	6
24-July	109	113	24	7
31-July	129	119	27	5
+/-	▲ 20	▲ 6	▲ 3	▼ 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
Jul	12.5	11.8	7.5	4.5	1.2	4.3	2.0	7.5	2.0
24-July	11.5	7.0	10.5	5.0	0.0	3.5	2.0	6.0	2.0
31-July	12.5	15.5	9.0	7.0	3.5	6.0	1.0	9.5	2.5
+/-	▲ 1.0	▲ 8.5	▼ 1.5	▲ 2.0	▲ 3.5	▲ 2.5	▼ 1.0	▲ 3.5	▲ 0.5

Coal Congestion Days								
Discharge Ports								
Country	China				India			
Date/Ports	Xingang (Coke)	Xingang (Coal)	Rizhao	Zhanjiang	Ennore	Mormugoa	Paradip (Thermal)	Tuticorin
Jul	0.0	2.9	1.4	3.4	9.7	0.6	14.8	0.4
24-July	0.0	5.5	0.0	3.5	0.0	0.0	13.0	2.0
31-July	0.0	2.0	0.0	3.0	3.5	0.0	16.5	0.0
+/-	-	▼ 3.5	-	▼ 0.5	▲ 3.5	-	▲ 3.5	▼ 2.0

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)
Jul	3.3	3.4	5.7	0.0	4.5	3.6	7.6	8.8	11	6.5	9.6
24-July	2.0	3.5	5.5	0.0	2.0	7.0	2.0	4.0	3.0	7.0	7.0
31-July	2.0	3.0	6.5	0.0	3.5	5.0	2.0	3.0	6.5	6.5	10.5
+/-	-	▼ 0.5	▲ 1.0	-	▲ 1.5	▼ 2.0	-	▼ 1.0	▲ 3.5	▼ 0.5	▲ 3.5

Iron Ore Congestion Days									
Discharge Ports									
Country	China								
Ports	Belun (Ningbo)	Qingdao	Caofeidan	Xingang (Tianjin)	Rizhao	Lanshan	Lianyungang	Bayuquan	Zhangjiang
Jul	1.6	2.9	1.9	2.5	0.8	3.8	1.0	3.8	3.5
24-July	1.5	4.5	2.0	2.0	2.0	11.0	2.5	4.0	3.5
31-July	2.0	5.0	3.0	2.0	4.0	9.0	3.0	2.0	3.0
+/-	▲ 0.5	▲ 0.5	▲ 1.0	-	▲ 2.0	▼ 2.0	▲ 0.5	▼ 2.0	▼ 0.5

KOBC Freight Panelist



ILDO CHARTERING CORP.

Rm2230, gwanghwamun officia bldg, #163,
jongno-gu, seoul, Korea
E: ops@insshipping.com
TEL: 82-02-364-3644 AREA: Pmx



JANGSOO SHIPPING CO., LTD.

503, gwacheon officetel, 1-14 byeoryang-dong,
gwacheon-city, Korea
E: shipping@jangintl.co.kr
TEL: 82-02-6245-4300 AREA: Cape, Pmx



DAESANG SHIPPING CO., LTD.

1307, doosan we've pavilion 81 sambong-ro,
jongno-gu, seoul, Korea
E: dry@daesangship.com
TEL: 82-02-6237-1100 AREA: Cape



BASIM CHARTERING CORP.

Rm1004 samryung bldg, 50-2 seosomun-dong,
jung-gu, seoul, Korea
E: cape@basimchart.com
TEL: 82-02-3789-7613 AREA: Cape



ACE CHARTERING CORP.

13F, donghwa bldg, 58-7, seosomun-dong,
jung-gu, seoul, Korea
E: ace@acechartering.com
TEL: 82-02-755-2100 AREA: Pmx



ARA SHIPPING CO., LTD

13F, donghwa bldg, 58-7, seosomun-dong,
jung-gu, seoul, Korea
E: chartering@araship.com
TEL: 82-02-739-7766 AREA: Smx, Hdy



KAYA SHIPPING CO., LTD

Rm302, koreanre bldg, 80, soosong-dong,
jongno-gu, seoul, Korea
E: handy@kayasel.co.kr
TEL: 82-2-738-9111 AREA: Smx, Hdy



MARS CO., LTD.

Room 2227, gwanghwamun officia bldg., #163,
sinmunno 1-Ga, jongno-gu, seoul 110-999, Korea
E: handy@mars7.co.kr
TEL: 82-2-736-4755 AREA: Smx, Hdy



INTERLINK

Room 1827, kwanghwamun officia bldg, 163,
shinmunno 1-ga, jongno-gu, seoul, Korea
E: interlink@interlink.sea.co.kr
TEL: 82-2722-8220 AREA: Pmx



OCEAN ROBIN SHIPPING HOLDING CORP.

Rm718-719, mansion b, chao wai soho, no.6/yi, chao
wai st, chao yang district, beijing, China
E: hdy@oceanrobin.cn
TEL: 86-10-5878-4588 AREA: Pmx, Smx, Hdy



MARITIME SHIPBROKERS CO., LTD

43 thai cc tower, 35th fl., south sathorn road
yannawa, sathorn bangkok 10120 Thailand
E: fix@mshipbrokers.com
TEL: 66-2-672-3826(27) AREA: Smx, Hdy



GREATWALL INTERNATIONAL MARINE LTD.

Room 617, block a, chengjian plaza, no.18,
beitapingzhuang road, haidian district, beijing, China
E: broking@gwshipping.net
TEL: 86-10-8833-2720 AREA: Smx



MERCHANT SHIP BROKERS

Room 809, kun tai international mansion bldg 1, yi
no.12, chaowai street, chaoyang district, beijing
100020, China
E: chartering@merchantship.com.cn
TEL: 86-10-5879-0689 AREA: Smx



WONSILD

1-2 20F guangdong finance building, 88-91
connaught road west, Hong Kong
E: dry@wonsild.com
TEL: 852-2548-9899 AREA: Pmx, Smx

KOBC Freight Panelist



FLASHIP PTE LTD

8 eu tong sen street, #15-87, the central,
Singapore 059818
E: cape@ildochtrg.co.kr
TEL: 65-6225-7302 AREA: Cape



M.I.T CHARTERING & AGENCE CO., LTD.

10F, no.100, section 3, minsheng east road,
taipei, Taiwan R.O.C.
E: handysupra@mittpe.com.tw
TEL: 886-2-2712-5363 AREA: Cape, Pmx, Smx



MAX-BRIDGE CO., LTD.

10F-4, no. 65, sung teh road, taipei 110,
Taiwan
E: dry@max-bridge.com.tw
TEL: 886-2-23462077 AREA: Smx, Hdy



GOOD TURN TRANSPORTATION LTD.

10th floor, no. 34, nanking E. road, section 1
taipei, Taiwan, R.O.C
E: ct@goodturn.com.tw
TEL: 886-2-2567-0701 AREA: Smx, Hdy



HOWE ROBINSON PARTNERS, SHANGHAI

Room 1508-10, shanghai times square, 93
huai hai zhong road, shanghai 200021,
China
E: hrs.hdy@howerobinson.com
TEL: 86-2310-0188 AREA: Pmx, Hdy



MU-PROGRESSIVE SHIPPING

Ship Research building, Room 709-710, 600
Minsheng road, Pudong New Area, Shanghai
200135-P.R China
E: shipping@muprogressive.com
TEL: 86-21-6164-9918 AREA: Pmx



OPTIMA INTERNATIONAL SHIPBROKING SERVICES SHANGHAI OFFICE

Ship Research building, Room 709-710, 600
Minsheng road, Pudong New Area, Shanghai
200135-P.R China
E: charteringchina@optimashipbroking.com
TEL: 86-21-5885-2977 AREA: Smx



SEA PROSPER LIMITED

Room 7F, 7th Floor, Qian Jiang Tower,
No.971 Dong Fang Road, PuDong New
District, Shanghai, China
E: beijing.handy@seaprospertld.com
TEL: 86-21-3319-1025 AREA: Smx, Hdy



LN STEAMSHIP

Platinum28, 28 Genting Lane #04-03
Singapore 349585
E: LN@LNsteamship.com.sg
Tel: (65) 6446-7622 Area: Smx, Hdy



ARGO ORIENTAL SHIPPING LIMITED

Room 1202, Building A, Sanlitun SOHO, No.8
Gongti Beilu, Chaoyang District, Beijing, China
E: bulk@argo-oriental.com
TEL: 86-10-8468-3100 AREA: Pmx, Smx, Hdy



EVER SHINE CONSULTING CO., LTD.

Room 2201, Jiangnan Shipyard Building, 600
Luban Road, Shanghai, 200023, China
E: capepmx@evershineconsult.com
TEL: 86-21-5383-0189 AREA: Cape, Smx

KOBC S&P Panelist



GYRO MARITIME CO., LTD

Rm1132, gwanghwamun officia bldg, #163,
jongno-gu, seoul, Korea
E: snp@gyromaritime.co.kr
TEL: 82-2-723-2363
AREA: Newbuilding, Secondhand



STL GLOBAL

101-1401, Lotte Castle President, 109, Mapo-daero,
Mapo-gu, Seoul, Korea
E: snp@stlkorea.com
TEL: 82-2-776-0840
AREA: Newbuilding, Secondhand



HANBADA CORPORATION

Rm803, korean Reinsurance Bldg., 68,
Jong-ro 5-gil, Seoul, Korea
E: rich@hanbada.kr
TEL: 82-2-720-8874
AREA: Newbuilding, Secondhand



HANWON MARITIME CO., LTD

19F, Wise Tower, 17, Sejong-daero, Jung-gu,
Seoul, Korea
E: Project@iHanwon.com
TEL: 82-2-2176-1101
AREA: Secondhand



KIMS MARITIME CO., LTD

101-2403, brown stone seoul, 355,
jungnim-dong, jung-gu, seoul, Korea
E: snp@kimsmaritime.co.kr
TEL: 82-2-732-3237
AREA: Newbuilding, Secondhand



REPKO

6th fl., Saerona Bldg., 59, Gangnam-daero
79-gil, Seocho-gu, Seoul, Korea
E: repko@repkoship.com
TEL: 82-02-723-6253
AREA: Newbuilding, Secondhand



HAIDELY SHIPPING

Room 418 Qianjiang Tower, No.971
Dongfang Road, Shanghai, China
E: ships@haidely.com
TEL: 86-21-5133-6298
AREA: Newbuilding, Secondhand



MAXMART SHIPPING & TRADING CO., LTD

16F-2, No.77, Sec.2, Dun Hua S.Rd., Daan
District, Taipei 10682, Taiwan
E: snp@maxmart.com.tw
TEL: 886-2-2707-7979
AREA: Secondhand



CLICK MARITIME LIMITED

2007B, 20/F., World Wide House, No.19 Des
Voeux Road, Central, Hong Kong
E: project@clickships.com
TEL: 852-2905-1978
AREA: Newbuilding, Secondhand



HIT MARINE COMPANY LTD.

Room 809, East Building, 2218 Hunan Road,
Pudong, shanghai, China
E: lisheng@hitco.com.cn
TEL: 86-21-5820-3737
AREA: Newbuilding, Secondhand



WIRANA SHIPPING CORPORATION

20 collyer quay, #09-02 tung centre,
Singapore 049319
E: wirana@wirana.com.sg
TEL: 65-6227-0115
AREA: Demolition



PIONEER SHIPBROKERS (VIETNAM)

Pioneer House, No.32 Ngan Long Villas,
Nguyen Huu Tho Street, Phuoc Kien Ward,
Nha Be District, Ho Chi Minh, Vietnam
E: snp@pioneershipbrokers.com.vn
TEL: 84-8-3781-7289
AREA: Secondhand



GMS KOREA

CEO Suite #6, 15th Floor, Kyobo Building, 1
Jongro, Jongro-gu, Seoul, Korea
E: snp@gmsinc.net
TEL: 82-2-2010-8820
AREA: Demolition



HARVEST SHIPBROKERS PTE. LTD.

Room 2602, Merchants Tower, No. 161
Lujiazui East Road, Pudong, Shanghai, China
E: snp@harvest-ship.com
TEL: 86-21-6868-5152
AREA: Newbuilding, Secondhand

KOBC S&P Panelist



SSY SINGAPORE

50 Raffles Place #14-01/02 Singapore Land Tower Singapore (048623)
E: ssysnp@ssysin.com.sg
TEL: 65-6854-7123
AREA: Newbuilding, Secondhand



FOROCEAN SHIPTRADING

Room 1208, Tongsheng Tower, 458 Fushan Rd. Pudong District, Shanghai, China
E: snp@forocean.net
TEL: 86-21-5081-6582
AREA: Newbuilding, Secondhand



RESHAMWALA SHIPBROKERS

7-A pil court, 111 maharshi karve road, churchgate, mumbai - 400 036, India
E: chartering@reshamwalashipbrokers.com
TEL: 91-22-6131-7000
AREA: Newbuilding, Secondhand



Seasure Shipbroking

Lyric House, 149 Hammersmith Road, London
E: seasure@seasure.co.uk
TEL: 44-20-3327-9750
AREA: Newbuilding, Secondhand



McQuilling Brokerage Partners Asia Pte Ltd

8 TEMASEK BOULEVARD, #21-02 SUNTEC TOWER 3, Singapore
E: snp.sg@mcquilling.com
TEL: 65-6324-2555
AREA: Newbuilding, Secondhand