China Domestic Coastal Freight & Transaction Weekly

国内沿海散货船/油轮运价与交易周报

BASED ON SHANGHAI SHIPPING EXCHANGE (SSE) OFFICIAL PUBLIC DATA & AI-ASSISTED ANALYSIS • SEPTEMBER 7, 2026 / 2026年09月7日 • SSE PUBLICATION: 2026-09-04

About this report / 关于本报告：This weekly briefing covers China coastal bulk freight (CBFI), crude-import tanker freight (CTFI) and container freight (SCFI) indices from the Shanghai Shipping Exchange (SSE) official weekly publication, ship auction listings, LPR announcements (PBC) and MOT monthly port statistics. Sections without a connected public data source are intentionally left blank rather than estimated.

本周报涵盖上海航运交易所（SSE）官方发布的沿海散货运价（CBFI）、原油进口运价（CTFI）与集装箱运价（SCFI）指数，以及船舶拍卖挂牌、人民银行 LPR 公告与交通运输部月度港口吞吐量统计。暂无公开数据来源的章节为避免编造数字，如实留空。

1,168.23
CBFI 沿海散货
↓ 2.12% WoW

8,413.38
CTFI 原油进口
↑ 3.04% WoW

3,590.05
SCFI 集装箱
↑ 2.29% WoW

1,725.91
CDFI 干散货进口
↑ 3.34% WoW

1. Market Overview 1. 市场综述

This week, China's coastal bulk freight market weakened, with the CBFI composite falling 2.12 points to 1168.23, driven by declines in coal, grain, and ore sub-indices. In contrast, the crude oil import tanker market strengthened, as the CTFI rose 3.04% to 8413.38, led by gains on the West Africa and US Gulf routes. The container export market also firmed, with the SCFI up 2.29% to 3590.05, while the China (Coastal) Container Freight Index (CDFI) advanced 3.34% to 1725.91. Overall, the week showed a divergence between the soft coastal dry bulk segment and the firmer tanker and container sectors.
本周，中国沿海散货运价市场走弱，CBFI综合指数下跌2.12点至1168.23点，主要受煤炭、粮食和矿石分项指数下跌拖累。与此相反，原油进口油轮市场走强，CTFI指数上涨3.04%至8413.38点，其中西非和美湾航线涨幅居前。集装箱出口市场也表现坚挺，SCFI指数上涨2.29%至3590.05点，而中国（沿海）集装箱运价指数（CDFI）上涨3.34%至1725.91点。总体来看，本周呈现沿海干散货市场疲软，而油轮和集装箱板块相对坚挺的分化格局。

2. Coastal Dry Bulk Freight (CBFI) 2. 沿海散货运价（CBFI）

The CBFI composite index declined 2.12 points week-on-week to 1168.23. Among sub-indices, the coal index fell 3.14 points to 1201.93, the grain index edged down 0.37 points to 1210.17, and the ore index slipped 1.41 points to 1120.41. All major coal routes recorded losses, with the largest drops on the Huanghua-Shanghai route (-4.07) and Qinhuangdao-Shanghai (-3.67). Grain and ore routes also softened, reflecting subdued demand for coastal dry bulk transport.
CBFI综合指数本周环比下跌2.12点至1168.23点。分项指数中，煤炭指数下跌3.14点至1201.93点，粮食指数微跌0.37点至1210.17点，矿石指数下滑1.41点至1120.41点。主要煤炭航线均录得下跌，其中黄骅至上海航线跌幅最大（-4.07点），秦皇岛至上海航线下跌3.67点。粮食和矿石航线也表现疲软，反映出沿海干散货运输需求低迷。

3. Crude Import Tanker Freight (CTFI) 3. 原油进口运价（CTFI）

The China Import Crude Oil Tanker Freight Index (CTFI) rose 3.04% week-on-week to 8413.38. Route-specific movements: CT1 (Middle East Gulf to Ningbo) increased 1.84% to 10833.98, CT2 (West Africa to Ningbo) jumped 7.36% to 4782.47, and CT4 (US Gulf STS to Ningbo) surged 7.94% to 2653.56. The strong gains on the longer-haul routes suggest tightening tonnage supply or increased demand for VLCCs on those trades.

中国进口原油运价指数（CTFI）本周环比上涨3.04%至8413.38点。分航线来看，CT1（中东湾至宁波）上涨1.84%至10833.98点，CT2（西非至宁波）大幅上涨7.36%至4782.47点，CT4（美湾STS至宁波）飙升7.94%至2653.56点。长途航线涨幅显著，表明这些航线上VLCC运力供应趋紧或需求增加。

4. Container Freight (SCFI) 4. 集装箱运价（SCFI）

The Shanghai Containerized Freight Index (SCFI) rose 2.29% week-on-week to 3590.05, indicating firmness in China's export container market. However, the SCFI reflects export container freight rates, not coastal container trades. The China (Coastal) Container Freight Index (CDFI) also advanced 3.34% to 1725.91, suggesting some strength in domestic coastal container shipping, though detailed route-level data is not available in this week's release.

上海出口集装箱运价指数（SCFI）本周环比上涨2.29%至3590.05点，显示中国出口集装箱市场表现坚挺。但SCFI反映的是出口集装箱运价，并非沿海集装箱运输。中国（沿海）集装箱运价指数（CDFI）同样上涨3.34%至1725.91点，表明国内沿海集装箱航运有所走强，但本周发布中未提供详细的分航线数据。

5. Secondhand Vessel Transactions 5. 二手船交易动态

No public data on secondhand vessel transactions or ship auctions is currently available in this week's release. The auction listings array is empty, and therefore no vessel names, prices, or deals can be reported.

本周发布中暂无二手船交易或船舶拍卖的公开数据。拍卖列表为空，因此无法报告任何船舶名称、价格或交易信息。

6. Ship Finance & Leasing 6. 船舶金融与租赁

As of the latest announcement date (2026-08-20), the 1-year Loan Prime Rate (LPR) stands at 3.00% and the 5-year LPR at 3.50%. These rates are unchanged from previous announcements, reflecting stable monetary conditions. No specific shipping finance or leasing deals were disclosed in this week's data.
根据最新公告日期（2026-08-20），1年期贷款市场报价利率（LPR）为3.00%，5年期以上LPR为3.50%，与前期持平，反映货币政策环境稳定。本周数据中未披露具体的航运金融或租赁交易。

7. Port Watch 7. 港口动态

The latest Ministry of Transport monthly port throughput figures are for the period ending 2026-04-30 (cumulative for the first four months of 2026). Ningbo-Zhoushan led with 48,290 10k tonnes of cargo and 1,525 10k TEU. Shanghai handled 26,979 10k tonnes and 1,896 10k TEU, while Shenzhen recorded 11,417 10k tonnes and 1,216 10k TEU. Other major ports include Tangshan, Qingdao, Rizhao, Guangzhou, Suzhou, Tianjin, Yantai, Lianyungang, and Huanghua. All figures are cumulative for the period.
交通运输部最新月度港口吞吐量数据统计周期截至2026年4月30日（为2026年前四个月累计值）。宁波舟山港货物吞吐量领先，达48290万吨，集装箱1525万TEU。上海港完成26979万吨和1896万TEU，深圳港为11417万吨和1216万TEU。其他主要港口包括唐山、青岛、日照、广州、苏州、天津、烟台、连云港和黄骅。所有数据均为该统计期的累计值。

8. Next Week Outlook 8. 下周展望

Looking ahead to next week, market participants should monitor the following factors: seasonal changes in coal demand as summer heat subsides, potential impacts of typhoon season on port operations and vessel schedules, and any shifts in crude oil import volumes that could affect tanker freight rates. Additionally, the divergence between coastal bulk and container/tanker markets may continue, depending on domestic industrial activity and global trade flows. No specific numeric forecasts are provided.
展望下周，市场参与者应关注以下因素：夏季高温消退后煤炭需求的季节性变化、台风季节对港口作业和船期可能造成的影响，以及原油进口量的变化对油轮运价的影响。此外，沿海干散货市场与集装箱/油轮市场的分化走势可能延续，取决于国内工业活动和全球贸易流。不提供具体的数值预测。

CBFI Coastal Route Details CBFI 沿海航线明细（指数点）

航线（指数点）	本期	涨跌
秦皇岛-广州	1,048.89	-3.18%
秦皇岛-广州	1,081.61	-2.48%
秦皇岛-厦门	909.88	-3.40%
秦皇岛-福州	845.20	-2.53%
秦皇岛-上海	1,250.30	-3.67%
黄骅-上海	888.96	-4.07%
天津-上海	1,275.29	-3.15%
京唐/曹妃甸-宁波	1,243.66	-3.37%
秦皇岛-宁波	1,174.84	-2.83%
秦皇岛-张家港	1,256.01	-3.18%
秦皇岛-张家港	1,201.21	-2.46%
天津-镇江	1,213.49	-2.91%
天津-镇江	1,395.59	-1.93%
秦皇岛-南京	1,232.55	-2.84%
锦州-广州	1,198.33	-0.76%
营口-深圳	1,192.81	+0.00%
青岛/日照-张家港	719.64	-1.74%
北仑-镇江	1,087.43	-1.75%
舟山-张家港	1,102.62	-0.78%

Ship Auction Listings (Last 7 Days) 近 7 天船舶拍卖挂牌

近 7 天暂无拍卖挂牌数据（n/a）。

Loan Prime Rate (PBC) 贷款市场报价利率（LPR）

1 年期 LPR	5 年期以上 LPR	公告日
3.00%	3.50%	2026-08-20

MOT Port Throughput 交通运输部港口吞吐量

港口	货物（万吨，累计）	集装箱（万 TEU，累计）	统计月末
宁波舟山	48,290	1,525	2026-04-30
唐山	28,871	123	2026-04-30
上海	26,979	1,896	2026-04-30
青岛	25,117	1,153	2026-04-30
日照	21,869	264	2026-04-30
广州	21,661	913	2026-04-30
苏州	20,011	342	2026-04-30
天津	19,748	840	2026-04-30
烟台	18,990	204	2026-04-30
连云港	12,642	230	2026-04-30
黄骅	12,212	43	2026-04-30
深圳	11,417	1,216	2026-04-30

Data Sources / 数据来源：Shanghai Shipping Exchange (SSE / 上海航运交易所) — CBFI, CTFI, SCFI, CDFI official weekly publication (sse.net.cn); Ministry of Transport (交通运输部) monthly port statistics (mot.gov.cn); People's Bank of China (中国人民银行) LPR announcements (pbc.gov.cn). All figures above are official published values; no estimated or simulated data is used.

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