การอัพเดทค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 16 พ.ศ. 2562

สรุปค่าระวางเรือประจำสัปดาห์

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	SIZE USD/20'	SIZE USD/40'	Remark
Thailand - Shanghai	200	300	Effective till April 30, 2019
Thailand - Qingdao	300	450	
Thailand - Hong Kong	100	200	
Thailand - Klang	300	500	
Thailand - Jakarta	400	600	
Thailand - Hochiminh	250	350	
Thailand – Manila, North & South	300	450	
	Subject to CIC at destination		
Thailand - South Korea (Busan)	100	200	
Thailand - South Korea (Incheon)	200	400	
Thailand - Japan (Main Port)	300	400	
Thailand - Jebel Ali	550	700	
Thailand - Melbourne	400	800	Effective till April 30, 2019
Thailand - Europe (Main Port)	900	1,700	Effective till April 30, 2019
Thailand - US West Coast	1,500	1,900	Effective from April 30, 2019
Thailand - US East Coast	2,300	3,100	

สถานการณ์ค่าระวางในช่วงเดือนเมษายน 2562 อัตราค่าระวางในเส้นทางเอเชียที่บางเส้นทางปรับเพิ่มสูงขึ้นในเดือนมีนาคมได้ปรับลดลง โดยเส้นทาง Shanghai ปรับลดลง 50 USD/TEU และ 150 USD/FEU ทำให้อัตราค่าระวางอยู่ที่ 200 USD/TEU และ 300 USD/FEU และเส้นทาง Jebel Ali ปรับลดลง 50 USD/TEU และ 300 USD/FEU ทำให้อัตราค่าระวางอยู่ที่ 550 USD/TEU และ 700 USD/FEU ในขณะที่อัตราค่าระวางในเส้นทางเอเชียเส้นทางอื่น ส่วนใหญ่ค่าระวางยังคงที่ไม่เปลี่ยนแปลง โดยเส้นทาง Hong Kong ค่าระวางคงที่อยู่ที่ 100 USD/TEU และ 200 USD/FEU, เส้นทาง Klang ค่าระวางอยู่ที่ 300 USD/TEU และ 500 USD/FEU และเส้นทาง Japan ค่าระวางอยู่ที่ 300 USD/TEU และ 400 USD/FEU

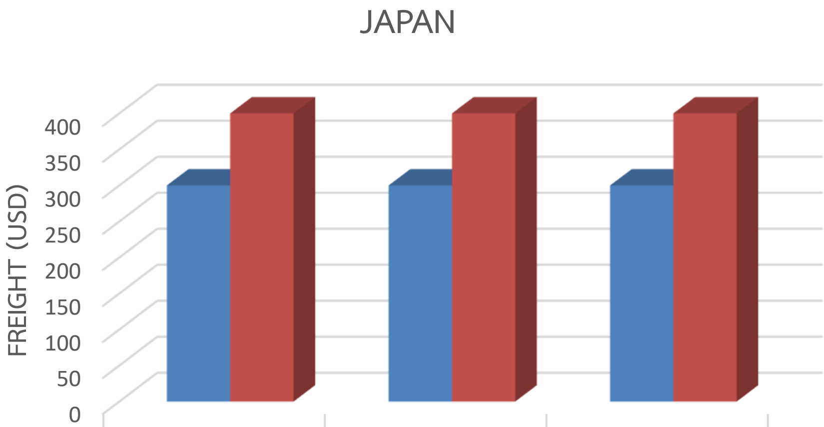
สำหรับเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนหลังของเดือนเมษายน อัตราค่าระวางคงที่ โดยค่าระวางในฝั่ง West Coast อยู่ที่ 1,500 USD/TEU และ 1,900 USD/FEU และอัตราค่าระวางทางฝั่ง East Coast อยู่ที่ 2,300 USD/TEU และ 3,100 USD/FEU ส่วนเส้นทางอื่นที่อัตราค่าระวางยังคงที่เช่นเดียวกัน คือ เส้นทาง Europe อัตราค่าระวางอยู่ที่ 900 USD/TEU และ 1,700 USD/FEU และมีการเรียกเก็บค่า Low Sulphur Fuel Surcharge (LSS) ที่ต้นทางในอัตราเดิม คือ 20 USD/TEU และ 40 USD/FEU และเส้นทาง Australia อัตราค่าระวางคงที่อยู่ที่ 400 USD/TEU และ 800 USD/FEU

CONTAINER FREIGHT RATE (REEFER)

ROUTE	SIZE		Remark
	USD/20’	USD/40’	
Thailand-Hong Kong	800	1,100-1,500	Effective till April 30, 2019
Thailand-Shanghai	900	1,100	
Thailand-Japan (Tokyo, Yokohama)	900	1,200	Effective till April 30, 2019
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,400	1800	

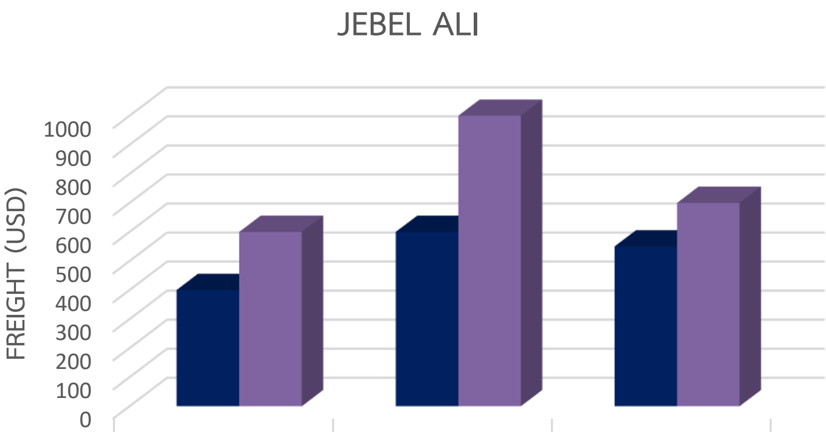
- สำหรับเส้นทางไปประเทศจีน และฮ่องกง มีการเรียกเก็บค่า Low Sulphur Surcharge (LSS) ที่ปลายทาง ในอัตรา 20 USD/TEU และ 40 USD/FEU
- ประกาศยกเลิกการเรียกเก็บค่า Bunker Surcharge (OBS) ในเส้นทางเอเชีย ในขณะที่เส้นทางไปยุโรปมีการปรับลดค่า OBS โดยเรียกเก็บในอัตรา 79 USD/TEU และ 158 USD/FEU
- เนื่องจากช่วงเดือนเมษายน มีสินค้าประเภททุเรียนส่งออกด้วยตู้ขนาด 40’HQ Reefer เป็นจำนวนมาก ทำให้อัตราค่าระวางมีการปรับเพิ่มสูงขึ้น

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ญี่ปุ่น เดือน ก.พ. ถึง เม.ย. ปี 2562



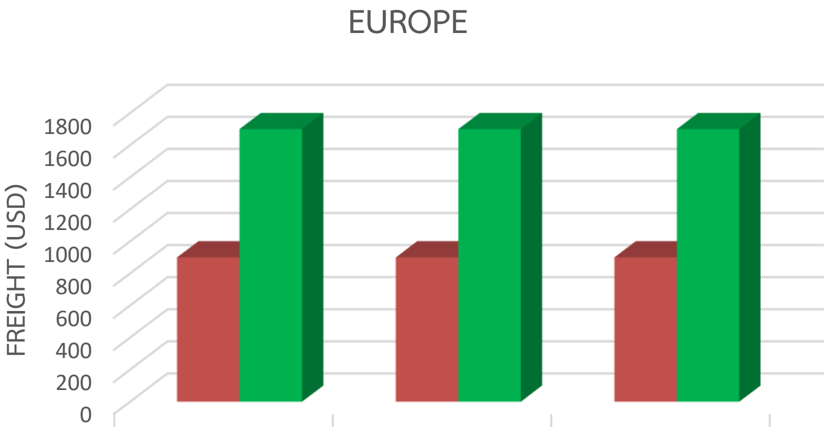
	28 Feb 19	31 Mar 19	30 Apr 19
20'DC	300	300	300
40'DC	400	400	400

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-Jebel Ali เดือน ก.พ. ถึง เม.ย. ปี 2562



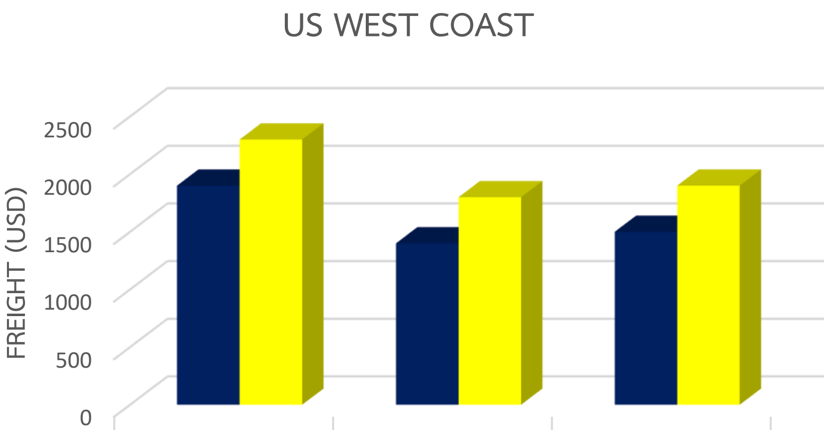
	28 Feb 19	31 Mar 19	30 Apr 19
20'DC	400	600	550
40'DC	600	1000	700

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน ก.พ. ถึง เม.ย. ปี 2562



	28 Feb 19	31 Mar 19	30 Apr 19
20'DC	900	900	900
40'DC	1700	1700	1700

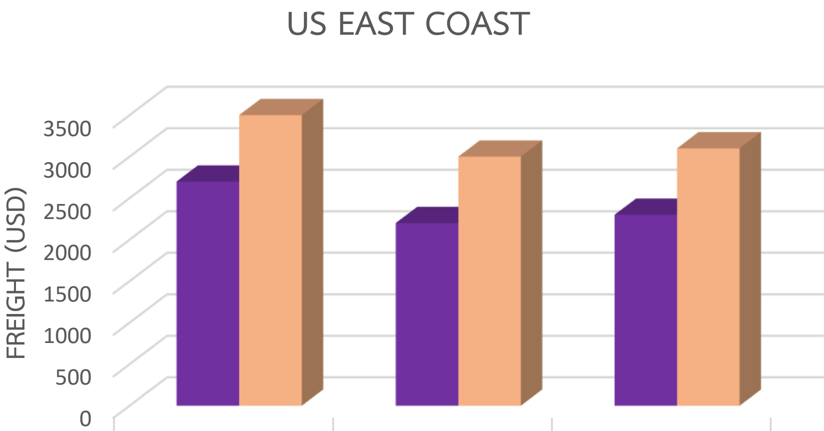
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-สหรัฐอเมริกา West Coast เดือน ก.พ. ถึง เม.ย. ปี 2562



	1 Feb 19	31 Mar 19	30 Apr 19
20'DC	1900	1400	1500
40'DC	2300	1800	1900

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต

ในเส้นทาง ไทย-สหรัฐอเมริกา East Coast เดือน ก.พ. ถึง เม.ย. ปี 2562



	1 Feb 19	31 Mar 19	30 Apr 19
20'DC	2700	2200	2300
40'DC	3500	3000	3100

รวบรวมประกาศจากสายเรือเรื่องการปรับการเรียกเก็บค่าใช้จ่าย

สายเรือ CMA CGM

- ประกาศเรียกเก็บค่า Rate Restoration Charge สำหรับสินค้าที่ส่งออกไปยังเส้นทางต่างๆ โดยมีผลบังคับใช้ตั้งแต่วันที่ 1 พฤษภาคม 2562 ดังนี้

Routing	Rate Restoration Charge
Kenya & Tanzania	USD300/TEU
Middle East Gulf Port	USD200/TEU
Pakistan / India / Sri Lanka	USD100/Container

ประกาศจากสายเรือเรื่องการตรวจสอบความปลอดภัยของสินค้า (Cargo Safety -screening of bookings and physical inspections)

สายเรือ Maersk ประกาศแจ้งให้ทราบเรื่องการตรวจสอบความปลอดภัยของสินค้า โดยสายเรืออาจมีการให้ผู้ส่งออกส่งข้อมูล ตลอดจนเอกสาร เพื่อแจกแจงรายละเอียดสินค้าให้ถูกต้อง รวมถึงอาจทำการเรียกตรวจเปิดตู้สินค้าเพื่อความปลอดภัย ดังนั้น จึงขอความร่วมมือจากผู้ส่งออกในการตรวจสอบข้อมูลการจองว่าแจ้งรายละเอียดของสินค้าครบถ้วนถูกต้องตามประมวลข้อบังคับว่าด้วยการขนส่งสินค้าอันตรายทางทะเล (International Maritime Dangerous Goods Code: IMDG) รวมถึงการทำข้อมูลใน Material Safety Data Sheet (MSDS) ให้เป็นปัจจุบัน เพื่อบรรลุวัตถุประสงค์การขนส่งที่ได้มาตรฐาน และปลอดภัย

Forwarders report rising demand for ex-China box slots

Ocean rates could make further gains on Asia-Europe trade through May if carriers continue to ration capacity, according to one source. Forwarders report rising demand for container slots out of China with one source predicting ocean freight rates could continue to make gains on the Asia-Europe trade through May if carriers continue to ration capacity.

Spot freight rates on the Shanghai-Rotterdam trade rose 2% last week and are now 14% higher than a year earlier, according to the latest World Container Index as assessed by Drewry. Although container shipping analysts contacted by *Lloyd's Loading List* are hesitant to read too much into last week's gains at this early stage, they agree there is a sizeable amount of data now available hinting that demand fundamentals on the trade could be improving. As reported in *Lloyd's Loading List,* Chinese export activity reawakened in March while forward manufacturing export order indicators are also strong. And, earlier today, China released a slew of positive official economic data. These revealed that GDP expanded by 6.4% in the first quarter, a higher rate than most analysts forecast. Industrial production also jumped 8.5% year-on-year in March - the fastest growth since July 2014 – and fixed asset investment and retail sales surged.

Flexport now expects carriers to try to implement 1 May General Rate Increases as demand for slots increases. "We are seeing record weeks - an indication that the market is recovering and a similar scenario to the demand recovery on the Asia-Europe trade lane observed during the same period last year," said Martin Holst-Mikkelsen, Director Ocean Freight at Flexport. Container shipping analyst MSI warned earlier this month that market balances on the Asia-Europe headhaul trade would remain challenging for lines unless they blanked sailings aggressively. And, according to Holst-Mikkelsen, that is exactly what some are now doing.

"We're seeing carriers balance their capacity through a larger number of blank sailings," he said. "This partly offsets new capacity induced on the trade lane and helps put a floor under overall market rates. "We expect rates to recover further into May as demand recovers fully and a number of vessels dock for scrubber installation as IMO 2020 draws closer." MSI's analysis concluded that westbound capacity over June-August on the Asia-Europe trade would total around 5.2 million TEU, and demand would have to grow by 5% if the container shipping industry was to achieve an aggregate load factor of 85%.

According to one leading digital forwarder, there are now multiple indicators to suggest that demand on the trade could increase in the months ahead. Iván Tintoré. CEO and co-founder of digital forwarder iContainers, told *Lloyd's Loading List* that the short-term bump in ocean freight rates on the China-Europe lane and signs of improved Chinese export activity were supported by long-term fundamentals. "We expect to see further augmentation of China-EU demand and searches," he said. "The EU is China's largest trading partner while China is the EU's second-largest trading partner, after the US. Following China's economic growth and middle-class expansion, we've been seeing a consequential increase in both imports - +27.4% - and exports - +30.5% - between China and the EU in the last 5 five years. "Another important factor is the e-commerce development bringing forward hundreds of new and smaller businesses in both China and the EU. As a result, trading companies no longer depend on major local distributors and now can procure smaller volumes directly from suppliers abroad."

On a regional level, he said Asian Pacific countries - particularly China - were also now driving global online sales. "Chinese e-commerce sales grew more than 30% in Q1 of 2019 to reach $1.989 trillion," he said. "But at the same time, China's internet penetration is still at a low 55%, since most of its population is located rurally. This reveals huge growth potential for China's e-commerce giants that will open doors to new money for Chinese suppliers and retailers – increasing their foreign investments and expansion into the European market. "This e-sales expansion preconditions the need for shipping solutions." He also said that new technologies were now transforming shipping, providing independent players with instant and competitive logistics solutions via, for example, Alibaba Logistics.

"A look at our internal data at iContainers comparing the months of March 2018 and March 2019 shows a 30% increase in searches by Chinese companies and a 17% increase in searches with origins in China and destinations in major EU ports," he added.

Source: https://www.lloydsloadinglist.com

Sulphur cap compliance linked to HFO supplies

Monjasa chief operating officer Svend Stenberg Mølholt tells Lloyd's List why he believes non-compliance with the 2020 sulphur cap is not as big a danger as it was a few months ago. With very low sulphur fuel oils and marine gasoil set to increasingly dominate demand, Monjasa chief operating officer Svend Stenberg Mølholt sees the supply of HSFO as being concentrated to the larger bunkering hubs and ports. MARKET dynamics will help enforce compliance with the 2020 sulphur cap as high sulphur fuel oil becomes less lucrative for suppliers, according to a senior official from Danish bunkers company Monjasa.

Chief operating officer Svend Stenberg Mølholt told Lloyd’s List that customers were less concerned about the prospect of an uneven playing field in 2020, as they anticipated increased levels of compliance with the 0.5% sulphur emissions limit. One of the reasons he identifies is the availability of the cheaper high sulphur fuel oil. HSFO, which according to the International Energy Agency’s latest projections will account for around 30% of marine fuel demand in 2020, will be available in all the major bunkering ports, Mr Stenberg Mølholt believes. But that may not be the case for niche markets. With very low sulphur fuel oils and marine gasoil set to increasingly dominate demand, Mr Stenberg Mølholt sees the supply of HSFO as being constrained and concentrated to the larger bunkering hubs and ports. These same destinations are the places where the rules are more strictly enforced and therefore compliance is likely to be more commonplace, in his view. He said Monjasa would supply HSFO where there was ample demand, but would not be opportunistic.

Though customers have inquired with the supplier about the future availability of the fuel, Monjasa has not seen any firm purchase commitments, potentially due to the vast uncertainty that still permeates its price in 2020. “And if we do not have a firm commitment on the demand side of high sulphur in niche areas then we are not going to carry it,” Mr Stenberg Mølholt said. But financial dynamics aside, concerns of cheating persist and the IEA anticipates a non-compliance rate of about 16% in 2020. While some countries such as Denmark have already issued fines for violations of regional sulphur emission rules, owners and operators have worried that financial penalisation will not be enough to deter ambitious violators.

That, however, may no longer matter. Mr Stenberg Mølholt believes other repercussions to being outed as a cheat have supplanted the significance of financial penalties. “If you are not complying you may potentially be losing your insurance coverage,” he said. “If you are not complying, you may lose your flag. If you are not complying, the reputational damage may be quite significant.” With less than nine months to go until judgement day, Monjasa has secured a flow of VLSFO into all of its main physical markets and will be supplying it to customers there, according to Mr Stenberg Mølholt. Bunker industry customers need to be partnering with suppliers that have demonstrable financial health and proven quality, he said. “It is about committing with a few suppliers on a slightly more strategic manner,” he said.

Operating in a sector that has often garnered attention for all the wrong reasons, as most recently with the bankruptcy of Aegean Marine and the debt struggles of Brightoil Petroleum Holdings, Monjasa went through its own legal ordeal a few years ago. A court case in Denmark concluded in 2017 with the full acquittal of former Monjasa co-owner Jan Jacobsen, who had been charged with fraud. Combined with a challenging shipping market, Monjasa's supply volumes declined from 4.2m tonnes in 2015 to 3.5m tonnes in 2017. But the company has bounced back, supplying 4.1m tonnes in 2018, of which 450,000 tonnes were supplied to vessels in the Panama Canal alone, accounting for 10% of total supply there. Mr Stenberg Mølholt believes Monjasa’s efforts to be more transparent have paid off, with the boost in supply potentially indicating that it is ahead of its competition in this regard. He also warned that with 2020 coming up and customers demanding fuel providers who can clearly document the bunkering supply chain, some bunker suppliers may not survive.

Source: https://lloydslist.maritimeintelligence.informa.com

Digital initiative can 'change course' of container shipping

Priority is to develop common information technology standards in order to increase the industry's efficiency, says logistics consultant. The formation by leading carriers of a shipping association tasked with developing common standards to speed the digitalisation of container shipping could unleash much-needed efficiencies and value in global supply chains, according to one leading logistics consultant. As reported by *Lloyd's Loading List*, Maersk, Hapag-Lloyd, Mediterranean Shipping Co and Ocean Network Express formally launched the Digital Container Shipping Association (DCSA) earlier this week after it received regulatory approval from the Federal Maritime Commission last month.

Andre Simha, who will chair the DCSA's supervisory board, said it would move container shipping into the digital era by collaborating with multiple stakeholders from the entire value chain and driving standardisation and digitalisation. Wolfgang Lehmacher, leading logistics consultant and the former Head of Supply Chain and Transport Industries at the World Economic Forum in Geneva and New York, welcomed the formation of DCSA. "This can be a change in the course of the container shipping industry and the beginning of overarching governance to prepare for the digital era," he told Lloyd's Loading List. "DCSA brings container shipping towards good waters. It's great to see the industry taking up the challenge to prepare for the digital era."

However, he said DCSA must work closely with other organisations if it is to succeed. "Applying a final set of global protocols across the economy might take a while as many different stakeholders have to be convinced and onboard," he said. "The association needs to align with collaborative efforts across the economy led by other organisations and alliances." According to Lehmacher, this should include the United Nations Rules for Electronic Data Interchange for Administration, Commerce and Transport (UN/EDIFACT), which has defined a range of global standards, and the United Nations Centre for Trade Facilitation and Electronic Business (UN/CEFACT), which incorporates blockchain with standards like EDI-FACT. He also said the International Organization for Standardization (ISO), the Blockchain in Transport Alliance (BITA) and OpenShipping.org, which offers an open source standard for global shipping, should be consulted.

"DCSA's priority is to develop common information technology standards in order to increase the industry's efficiency for both customers and shipping lines," he added. "Digitization only unfolds its full value if all stakeholders along the chain interact and exchange seamlessly. Establishing the protocols to enable this is the association's goal and is the correct goal."

Digital developments have been mushrooming across the global economy, according to Lehmacher. For example, Korean Customs Service (KSC) recently signed a Memorandum of Understanding (MoU) with the Korean operator of Malltail to develop a blockchain-based customs platform for the e-commerce industry. Walmart has also announced that all suppliers of leafy green vegetable for Sam's and Walmart are required to upload their data to the Walmart blockchain by September 2019. "Since Maersk and IBM announced their collaboration to use blockchain technology in trade in March 2017, distributed ledger technology proof of concepts have flourished in the container shipping industry," said Lehmacher. "Port of Antwerp, Pacific International Lines, and PSA International to name only a few have all carried out blockchain pilots and there is no shortage in technology start-ups.

"But the journey has been anything but smooth. In May 2018, two liner companies - Hapag-Lloyd and CMA CGM - stressed the urgent need for an industry standard, rejecting Maersk and IBM's blockchain solution and development of numerous distributed ledger technologies for the container sector." However, he said over the course of 2018 there had been a mindset shift in the shipping industry – from silo-behaviour towards more willingness to collaborate.

"The Global Shipping Business Network (GSBN), an open digital platform based on distributed ledger technology consortium, is a first for its industry. Another piece of evidence is that the Port of Rotterdam and the Port of Hamburg have entered into a data partnership. The competing ports started to share data to optimize calls of liners in the North Europe area. The ports also expressed their willingness to expand their model to other ports going forward." Lehmacher said the world was rapidly becoming a digitally connected ecosystem and it was time container shipping caught up.

"Digitization is the representation of the physical world, including resources and assets, behaviours and activities in the digital space," he added. "The digital era is about platforms and automation, about 'intelligent assets' or the effort to make all things in the economy 'intelligent'. "Digitization allows us to easily identify, assess and leverage what is available in the ecosystem – through dashboards and touchscreens. Cranes and containers, ships and trucks can so be monitored and moved across the ports and beyond from any place on the planet, provided it is connected. Data sharing at the earliest moment allows the parties involved to prepare for the arrival of vehicles and goods, which increases efficiency and avoids disruptions – as unfavourable events along the supply chain can be anticipated."

Lehmacher concluded: "DCSA is the new vehicle of the shipping industry charged with changing up gears in its effort to digitize – it is much needed."

Source: https://www.lloydsloadinglist.com

ตารางสรุปอัตราค่าระวางจากเอเชียไปเส้นทางต่างๆ อ้างอิงจาก Shanghai Containerized Freight Index (SCFI)
Source: http://en.sse.net.cn/indices/scfinew.jsp

Shanghai Containerized Freight Index (SCFI)				
Description	Unit	Weighting	Previous Index 12 April 2019	Current Index 19 April 2019
Comprehensive Index			782.46	761.74
Service Routes				
Europe (Base port)	USD/TEU	20%	640	638
Mediterranean (Base port)	USD/TEU	10%	715	717
USWC (Base port)	USD/FEU	20%	1606	1538
USEC (Base port)	USD/FEU	7.50%	2638	2634
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	734	702
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	339	308
East/West Africa (Lagos)	USD/TEU	2.50%	2691	2590
South Africa (Durban)	USD/TEU	2.50%	644	640
South America (Santos)	USD/TEU	5.00%	1434	1230
West Japan (Base port)	USD/TEU	5.00%	231	232
East Japan (Base port)	USD/TEU	5.00%	232	233
Southeast Asia (Singapore)	USD/TEU	7.50%	145	142
Korea (Pusan)	USD/TEU	2.50%	122	120

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