การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 49 พ.ศ. 2562

สรุปค่าระวางเรือประจำสัปดาห์

CONTAINER ALL IN FREIGHT RATE (DRY)

<table>
<tr><th rowspan="2">ROUTE</th><th colspan="2">SIZE</th><th rowspan="2">Low Sulphur Surcharge (LSS)</th><th rowspan="2">Remark</th></tr>
<tr><th>USD/20’</th><th>USD/40’</th></tr>
<tr><td>Thailand - Shanghai</td><td>200</td><td>300</td><td rowspan="4">Subject to ISOCC
USD 60/TEU, USD 120/FEU</td><td rowspan="14">Effective till
31-Dec.-2019</td></tr>
<tr><td>Thailand - Qingdao</td><td>300</td><td>450</td></tr>
<tr><td>Thailand - Hong Kong</td><td>100</td><td>200</td></tr>
<tr><td>Thailand - Japan (Main Port)</td><td>300</td><td>400</td></tr>
<tr><td>Thailand - Klang</td><td>300</td><td>500</td><td rowspan="5">Subject to ISOCC
USD 40/TEU, USD 80/FEU</td></tr>
<tr><td>Thailand - Jakarta</td><td>400</td><td>600</td></tr>
<tr><td>Thailand - Hochiminh</td><td>250</td><td>350</td></tr>
<tr><td rowspan="2">Thailand – Manila
(North & South)</td><td>300</td><td>450</td></tr>
<tr><td colspan="2">Subject to CIC at destination</td></tr>
<tr><td rowspan="2">Thailand - Jebel Ali</td><td>500</td><td>750</td><td rowspan="2">Subject to ISOCC
USD 97/TEU, USD 194/FEU</td></tr>
<tr><td colspan="2">Subject to War Risk Surcharge:
USD 35/TEU, USD 70/FEU</td></tr>
<tr><td>Thailand - South Korea (Busan)</td><td>50-80</td><td>150</td><td rowspan="2">USD 70/TEU, USD 140/FEU</td></tr>
<tr><td>Thailand - South Korea (Incheon)</td><td>150</td><td>300</td></tr>
<tr><td>Thailand - Melbourne</td><td>325-575</td><td>650-1,050</td><td>USD 106/TEU, USD 212/FEU</td></tr>
<tr><td rowspan="2">Thailand – Durban / Cape Town</td><td>850</td><td>1600</td><td rowspan="2">Subject to ISOCC
USD 136/TEU, USD 272/FEU</td><td rowspan="2">Effective till
15-Dec.-2019</td></tr>
<tr><td colspan="2">Subject to SCMC USD 30/BL</td></tr>
<tr><td rowspan="2">Thailand - Europe
(Main Port)</td><td>700</td><td>1,300</td><td rowspan="2">LSS: USD20/TEU, USD40/FEU
+
ISOCC: USD106/TEU, USD212/FEU</td><td rowspan="2">Effective till
15-Dec.-2019</td></tr>
<tr><td colspan="2">Subject to ENS USD30/BL</td></tr>
<tr><td>Thailand - US West Coast</td><td>1,300</td><td>1,600</td><td rowspan="2">-</td><td rowspan="2">Effective till
14-Dec.-2019</td></tr>
<tr><td>Thailand - US East Coast</td><td>2,200</td><td>2,700</td></tr>
</table>

หมายเหตุ: SCMC คือ Security Compliance Management Charge // ISOCC คือ IMO Sox Compliance Charge

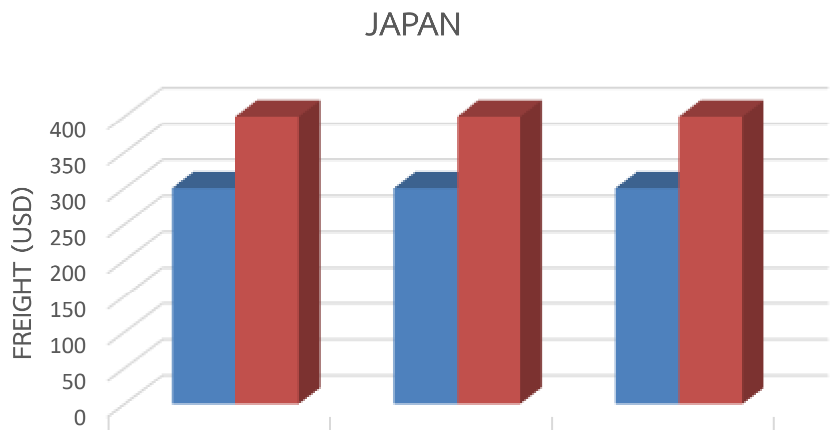
สถานการณ์ค่าระวางในช่วงเดือนธันวาคม 2562 อัตราค่าระวางในเส้นทางเอเชียส่วนใหญ่คงที่ไม่มีการเปลี่ยนแปลง โดยสายเรือมีการเรียกเก็บค่า Low Sulphur Surcharge เพิ่มเติมจากค่าระวางดังตาราง สำหรับเส้นทาง Shanghai อัตราค่าระวางคงที่อยู่ที่ 200 USD/TEU และ 300 USD/FEU เส้นทาง Hong Kong ค่าระวางคงที่อยู่ที่ 100 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 สำหรับเส้นทางแอฟริกาใต้ ค่าระวางตู้ 20’ ลดลง 50 USD/TEU ทำให้ค่าระวางอยู่ที่ 850 USD/TEU ในขณะที่ตู้ 40’ ค่าระวางคงที่อยู่ที่ 1,600 USD/FEU

สำหรับเส้นทาง Europe ค่าระวางคงที่อยู่ที่ 700 USD/TEU และ 1,300 USD/FEU โดยมีการเรียกเก็บค่า ISOCC ในอัตรา 106 USD/TEU ซึ่งเป็นค่าน้ำมันแยกต่างหากจากค่า LSS ส่วนเส้นทาง Australia อัตราค่าระวางของแต่ละสายเรือค่อนข้างแตกต่างกัน โดยอัตราเรียกเก็บอยู่ระหว่าง 325-575 USD/TEU และ 650-1,050 USD/FEU และมีการเรียกเก็บค่า LSS ในอัตรา 106 USD/TEU เช่นเดียวกับเส้นทางยุโรป ในขณะที่เส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนแรกของเดือนธันวาคม ค่าระวางปรับเพิ่มขึ้น 200 USD/ตู้ สำหรับฝั่ง West Coast ในขณะที่ฝั่ง East Coast ปรับเพิ่มเขึ้น 100 USD/TEU และ 300 USD/FEU ทำให้ค่าระวางในฝั่ง West Coast อยู่ที่ 1,300 USD/TEU และ 1,600 USD/FEU และฝั่ง East Coast ค่าระวางอยู่ที่ 2,200 USD/TEU และ 2,700 USD/FEU

CONTAINER FREIGHT RATE (REEFER)

ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	800	900	USD 70/TEU, USD 135/FEU	Effective till 31-Dec-2019
Thailand-Shanghai	900	1,000		
Thailand-Japan (Tokyo, Yokohama)	900	1,200	USD 12/TEU, USD 24/FEU	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,400	1800	USD 166/TEU, USD 332/FEU	

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต ในเส้นทาง ไทย-ญี่ปุ่น เดือน ต.ค. ถึง ธ.ค. ปี 2562



	31 Oct 19	30 Nov 19	31 Dec 19
20'DC	300	300	300
40'DC	400	400	400

December is subject to Low Sulphur Surcharge: USD60/TEU และ USD120/FEU

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต ในเส้นทาง ไทย-Jebel Ali เดือน ต.ค. ถึง ธ.ค. ปี 2562

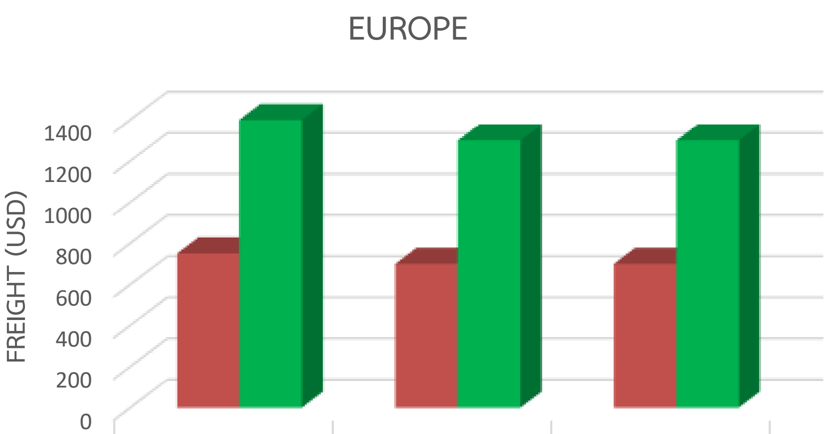
	31 Oct 19	30 Nov 19	31 Dec 19
20'DC	500	500	500
40'DC	750	750	750

20'DC 40'DC

December is subject to

- War Risk Surcharge: USD35/TEU และ USD70/FEU
- Low Sulphur Surcharge: USD97/TEU และ USD194/FEU

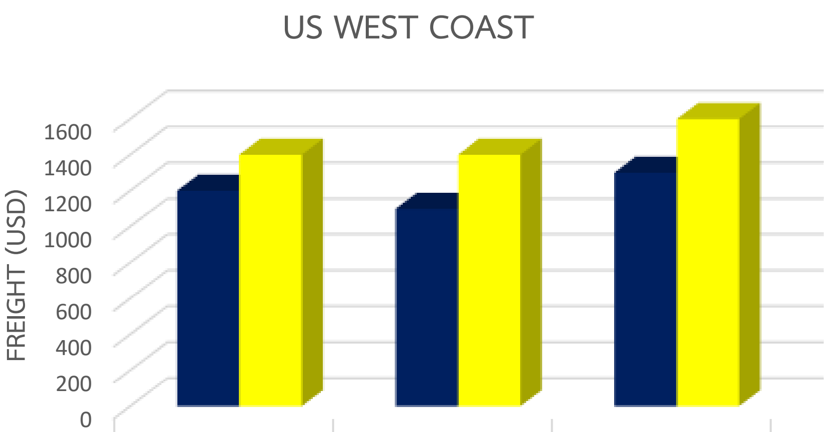
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต ในเส้นทาง ไทย-ยุโรป เดือน ต.ค. ถึง ธ.ค. ปี 2562



	31 Oct 19	30 Nov 19	15 Dec 19
20'DC	750	700	700
40'DC	1400	1300	1300

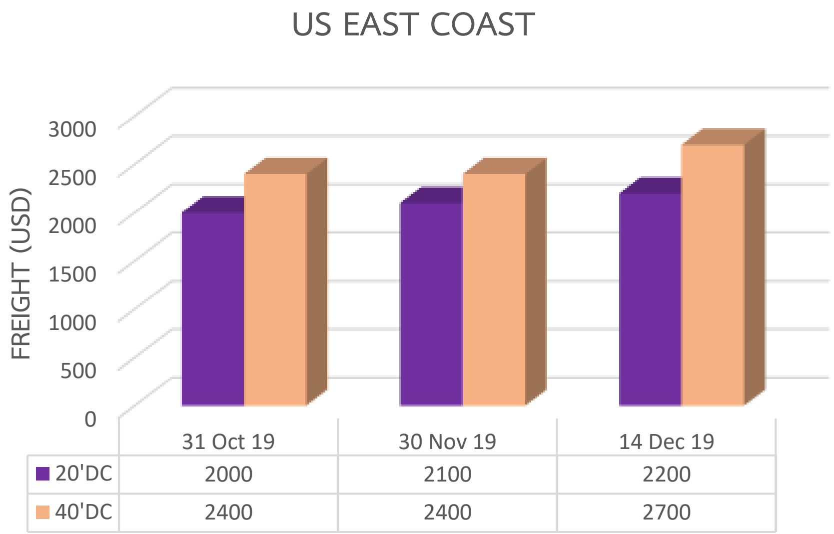
December is subject to
ENS: USD30/BL
Low Sulphur Surcharge: USD20/TEU และ USD40/FEU
ISOCC: USD106/TEU และ USD212/FEU

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต ในเส้นทาง ไทย-สหรัฐอเมริกา West Coast เดือน ต.ค. ถึง ธ.ค. ปี 2562



	31 Oct 19	30 Nov 19	14 Dec 19
20'DC	1200	1100	1300
40'DC	1400	1400	1600

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-สหรัฐอเมริกา East Coast เดือน ต.ค. ถึง ธ.ค. ปี 2562



รวบรวมประกาศการปรับค่าใช้จ่ายจากสายเรือ

สายเรือ Hapag Lloyd

- ประกาศปรับการเรียกเก็บค่า Marine Fuel Recovery (MFR) สำหรับเส้นทางจาก East Asia ไปยังเส้นทางต่างๆ ดังนี้ โดยมีผลตั้งแต่วันที่ 1 มกราคม 2563

Route	MFR (Dry) (USD/TEU)	MFR (Reefer) (USD/TEU)	Route	MFR (Dry) (USD/TEU)	MFR (Reefer) (USD/TEU)
South America West Coast	339	490	West Africa	349	503
Central America / Caribbean	288	424	South Africa	236	359
South America East Coast	331	489	East Africa	218	311
North America East Coast	308	448	Middle East	173	266
North America West Coast	159	237	Indian Subcontinent	181	254
South Europe	249	384	Intra East Asia	109	139
North Europe	260	403	Oceania	207	280

- ประกาศปรับการเรียกเก็บค่า Currency Adjustment Factor (CAF) สำหรับสินค้าที่ส่งออก และนำเข้าไปยัง North Europe และ เมดิเตอร์เรเนียน ในอัตรา 2.14% โดยมีผลตั้งแต่วันที่ 1 มกราคม 2563
- ประกาศปรับการเรียกเก็บค่า General Rate Increase (GRI) จากเส้นทาง East Asia ไปยังเส้นทางต่างๆ ดังนี้

Route	GRI	Effective Date
Mexico, Central America, South America, Caribbean and Panama	USD 1500/Container	1-Jan-2020
East Coast South America	USD 600/Container	15-Dec-2019

- ประกาศปรับการเรียกเก็บค่า Peak Season Surcharge (PSS) จากทุกเส้นทางไปยังเส้นทาง Tin Can Island และ Apapa ประเทศไนจีเรีย ในอัตรา USD 1025/ตู้ โดยมีผลตั้งแต่วันที่ 15 ธันวาคม 2562 ยกเว้นสินค้าที่ออกจากเส้นทางสหรัฐอเมริกาจะมีผลตั้งแต่วันที่ 6 มกราคม 2563

สายเรือ Wan Hai

- ประกาศปรับการเรียกเก็บค่า Tariff Bunker Charge ในเส้นทางทรานส์แปซิฟิก ในอัตราดังต่อไปนี้ โดยมีผลตั้งแต่วันที่ 1 มกราคม – 31 มีนาคม 2563

Route	20’	40’	40’HQ	45’
To US West Coast	USD 335	USD 420	USD 470	USD 530
From US West Coast	USD 85	USD 105	USD 105	USD 115

สายเรือ Maersk

- ประกาศปรับการเรียกเก็บค่า Peak Season Surcharge (PSS) สำหรับสินค้าจากเส้นทาง Far East (ยกเว้นญี่ปุ่น) ไปยังเส้นทางเมดิเตอร์เรเนียน ในอัตรา USD 375/20’ และ USD 750/40’ โดยมีผลตั้งแต่วันที่ 16 ธันวาคม 2562

สายเรือ CMA CGM

- ประกาศปรับการเรียกเก็บค่า Rate Restoration Charge สำหรับสินค้าจากเส้นทางเอเชียไปยังเส้นทางสหรัฐอเมริกาและแคนาดา ในอัตรา USD 900/20’, USD 1000/40’ และ USD 1125/40’HQ โดยมีผลตั้งแต่วันที่ 1 มกราคม 2563

Happier new year in sight for ocean carriers as spot rates hold steady

Ocean carriers appear to have succeeded in recovering around 75% of their IMO transition surcharges for spot and short-term contract business from Asia to North Europe. And on the transpacific, the container lines appear to have achieved the full quantum of their low-sulphur surcharges.

Today’s Shanghai Containerized Freight Index (SCFI) recorded a further $34 per teu uplift in spot rates to North Europe, to $800 per teu. This followed the $64 per teu gain in the previous week, when the LSFO (low-sulphur fuel oil) surcharges were rolled out. Ocean carriers are generally looking to add an average $130 per teu to spot rates to cover the extra costs incurred in replenishing the fuel tanks of their ships with the more-expensive LSFO to comply with the IMO’s 0.5% sulphur cap on marine fuel that comes into force on 1 January. At approximately $500 per ton, LSFO is currently twice the price of the HFO (heavy fuel oil) that, prior to IMO 2020, ships burned on the majority of their voyages.

Analysts at Jefferies estimate that Maersk, for example, will see its fuel bill increase by $1.8bn next year as a consequence of the IMO 2020 regulations. And interestingly, the analyst’s assumption is that Maersk will only recover around half of this through surcharges. However, it is generally positive on its outlook for the Danish carrier and the market next year, where it forecasts higher freight rates driven by a tightening of supply. On the Asia-Mediterranean trade, the SCFI recorded a $41 increase, to $771 per teu, after a $41 gain the previous week.

Notwithstanding the spot rate increases achieved on both routes, carriers will attempt to hike rates again on 15 December. With the Chinese New Year falling early, on 25 January, carriers are confident that the expected full ships from the cargo rush prior to the holiday will support the rate increases. Moreover, carriers are looking to protect the rate gains from a post-CNY slump by announcing a number of blank sailings in Q1 and into Q2. For example, THE Alliance will void 13 headhaul voyages from its FE2, FE3 and FE5 loops.

On the transpacific, the US west coast component of the SCFI recorded a 7.4% increase, or $104 per 40ft, to $1,509, to make the gain $280 over the past two weeks – on a par with the required low-sulphur surcharge increase. For the east coast, there was a 1.7%, or $46, fall in the spot rate to $2,638 per 40ft. However, the previous week saw a big jump of $428 in the index. Martin Holst-Mikkelsen, head of ocean (EMEA) at Flexport, told *The Loadstar* he expected demand to remain high through to the end of January.

“The SCFI index is slightly above the same period last year by some 3% for the week. Looking at a five-week average, the SCFI is on a par with 2018. This should be seen in the light of both IMO 2020 transition charges and the Chinese New Year taking place earlier, which could be interpreted as a somewhat bearish signal," he said.

Source: https://theloadstar.com/

European shippers reject extension of unchanged liner competition exemption

ESC says current proposal by EC to prolong BER ignores customers' concerns and has no data supporting the decision – and leaves many items unclear, such as which consortia are covered under this legislation and why the 30% threshold is maintained. The European Shippers' Council has joined other cargo customer representative bodies in rejecting the proposal of the European Commission to extend the competition waiver granted to container lines for four more years without any modifications.

It said the current Consortia Block Exemption Regulation (BER), in place since 2009, "doesn't provide any instruments to deal with the current market drivers and has serious consequences that affect the present maritime business conditions". The shipper body, which represents the interests of more than 75,000 SMEs and multinational cargo owners in the European Union, said the proposal "pays no attention to the ongoing market requirements, where customers' demands – based on principles of committed, delivered, and transparently measured service performance – are key to build trust and efficiency among the maritime supply chain partners".

It continued: "The current proposal to prolong the BER has no data supporting the EC decision as it leaves many items unclear – like which consortia are covered under this legislation and why the 30% threshold is kept. Furthermore, one of the BER basic pillars, 'the return of benefits to transport users', is limited to the point of lower freight rates as the only parameter to assess these benefits. The other costs, like surcharges, or quality indicators like 'blank sailings', 'frequencies', and 'port-to-port pair connections', which have a significant impact on the shippers' operations, are disregarded in the Document." The ESC stressed that earlier this year, "on several occasions during the BER revision process", it had "already informed the EC about the regulation's negative effects and the needed changes".

It added: "In light of the above mentioned points, ESC will be active in the ongoing consultation period as to achieve a result where the customers' voice is considered and to conclude with a different decision from the current proposal described in the Staff Working Document." The ESC's feedback is consistent to comments made by other shipper and freight forwarder representative bodies. As reported in Lloyd's Loading List, the Global Shippers' Forum (GSF) last week added its voice to other ocean freight customer representative groups strongly criticising last week's recommendation by the European Commission to renew the so-called Consortia Block Exemption Regulation (CBER) that exempts container lines from aspects of EU competition law for a further four years from April 2020.

James Hookham, secretary general of GSF, said: "We are disappointed with the outcome of the Commission's review and disagree on several points with its reasoning. We shall be setting out our concerns and arguments in response, and campaigning for greater policing of shipping lines' activities." The principal commercial activities that the CBER allows are vessel-sharing arrangements between shipping lines that allow a frequency and range of destinations to be offered to shippers by a 'pooling' of vessel capacity on a particular route. GSF said the EU's stated intention to renew the BER, "while not unexpected, ignores the views of exporters and importers to and from the EU and their global suppliers and customers, who are concerned at continuing poor service levels in some trades served by consortia due to over-investment in capacity and seeming lack of competitive pressures".

Hookham added: "Shippers are well used to similar pooling arrangements in the aviation sector, which allows code-sharing arrangements to be established for the same aircraft. But these seem to be fully compatible with EU competition law without the need for a block exemption. “What is it about the global shipping lines that warrants this form of exceptional treatment under competition law? We are not convinced by the Commission’s arguments or conclusions.” He continued: “In our view, the Commission has missed the opportunity to ask the bigger questions about how the shipping sector got into its current situation of historically low shipping rates and over-capacity on many routes and whether the continuing exemptions from normal competition rules provided by the Block Exemption are the right remedy in the long term. The Commission looks set to prop up the shipping lines for a further four years without fully understanding why. European manufacturers and retailers, together with their customers and suppliers around the world, as the users of container shipping lines, deserve better support and service from their competition authority.”

As reported last week in *Lloyd’s Loading List*, representatives of shippers in the Netherlands specifically criticized the secrecy of the agreements currently allowed between lines, with Evofenedex saying it believed that the extension of BER in its current form meant “the Commission is harming cooperation between parties in the market”. It added: “The purpose of this exemption, which also applied over the last five years, would be, according to the Commission, to improve services to trading and production companies through a better network and shipping schedule for shipping companies. However, research by the International Transport Forum of the OECD (ITF) has shown that this is not the case.

“The shipping companies work together in globally operating consortia. And the agreements made by container shipping companies in those consortia are secret. We find it undesirable that there can be an exception to European competition rules while the underlying agreements between container shipping companies are not public.” Evofenedex managing director Machiel van der Kuijl said: “As a result, the customers of those shipping companies, our trading and production companies, do not have complete information in order to be able to make a proper assessment of which supplier is best to do business in container liner shipping. This really needs to be done differently and we will clearly communicate that to the Commission in the consultation process.”

The association highlighted that the European Commission will conduct another market consultation on the proposed decision between now and January, noting that “Evofenedex will indicate that the European Commission has the right to extend the BER (Block Exemption Regulation. However, issues such as more transparency about consortia, additional research into the dominant position of container shipping companies by the European Commission, and a clear enforcement regime are needed to limit the negative effects of this decision.”

As reported last week, while container line representatives welcomed the indication by the European Commission last week that it will extend its exemption for container liner shipping companies from the EU competition rules, European freight forwarding association Clecat expressed the disappointment among forwarders at the decision, noting: “Clecat expresses its disappointed with the fact that the Commission has dismissed the position of the users of liner shipping services. In its position paper as well as the reply to a stakeholder consultation, Clecat has called for a repeal of the BER as the current framework is obsolete given the increased market concentration. “At the same time, an important condition for the exemption, which is to provide benefits to the customers, is no longer met, as neither service quality nor productivity have improved over the years. Instead, users of liner shipping services and their service providers have suffered from an increasingly unbalanced market situation since carriers entered into major cooperation agreements.

“In its evaluation paper, the Commission itself recognizes that there is no accurate data regarding the Consortia BER and that it is therefore difficult to assess whether some consortia are below the 30% in terms of their market share. According to the Commission’s assessment, only one fifth of consortia falls within the scope of the Consortia BER given that it could be said with certainty that their market shares are below 30%. Yet, the Commission has proposed to prolong the Consortia BER as it is, clearly dismissing the arguments of an important range of stakeholders in the maritime supply chain, all of them having serious problems with the current BER." Miglė Blusevičiūtė, policy manager at Clecat, told *Lloyd's Loading List* that the association would respond to the public consultation or "feedback period" launched this week by the Commission, running from 20 November 2019 to 3 January 2020.

Source: https://www.lloydsloadinglist.com/

IMO 2020 impacts will linger far beyond next year

Preparations ahead of the IMO 2020 low-sulfur mandate have taken considerable attention within the industry this year. In essence, many beneficial cargo owners (BCOs) didn't even know about IMO 2020 until carriers announced their new low-sulfur bunker adjustment factor (BAF) structure at the end of 2018. Given that the coming regulations had been known for several years prior, it is clear that no material action was taken until the last possible moment. With this backdrop, it is therefore prudent to look beyond the deadline of January 1, 2020 and look at what IMO 2020 is likely to result in not just in the very short term, but also in the coming years. This is also relevant as there are many important aspects of the mandate that have been left by the wayside in the rush to meet the more immediate Jan. 1 deadline.

First, it is important to recognize why the IMO 2020 rules were made in the first place. Numerous conversations with all types of industry stakeholders during 2019 has clearly shown there is a misconception about the reason. There is a widespread belief that IMO 2020 is somehow linked to the wider issue of greenhouse gas emissions and global warming. This is simply incorrect. IMO 2020 only pertains to sulfur that does not act as a greenhouse gas. This type of emission reduction does nothing to alleviate global warming concerns. The reason for IMO 2020 is much simpler. Elevated levels of sulfur emitted into the air simply kill people through a higher incidence of cardiovascular illness and lung cancer. The baseline is that introduction of the new sulfur emission rules will prevent more than 100,000 premature deaths annually. Understanding the core reason is typically a good starting point for understanding the urgency and steadfastness with which calls for extension of the deadline has been rejected. But looking toward 2021, 2022, and beyond, several additional elements warrant closer inspection — the impact of scrubbers, who will end up paying the bill, and the preparedness of other actors in relation to enforcement.

<u>Scrubber popularity on the rise</u>

By now it is clear that carriers are vigorously pursuing the installation of scrubbers. At a price differential of some \$200 to \$250/ton, the payback time is on the order of just 12 to 18 months. A continuation of this spread would ensure continued scrubber installations in the next couple of years. But this brings up an aspect likely to become an issue in 2021. At that point, a very substantial portion of the vessels operating in the Asia-Europe trade will be equipped with scrubbers. Furthermore, many will be getting to the point where the capital costs have been covered. Hence, for contract negotiations in 2021 and even more so in 2022, we should expect a severe reduction in the associated BAF levels on this particular trade. Not that they will drop to zero, as the scrubbers certainly have costs associated with maintenance and also because they do increase overall fuel consumption 1 to 3%. But it is clear that the price competition in Asia-Europe in 2021-22 will be strongly dominated by carriers who, by that time, have had their capital costs for scrubbers earned back.

This also implies that the usual "arms race rules" apply. As soon as a critical mass of vessels are getting scrubbers installed in a trade lane, everyone has to follow suit — or lose in the predictable competition on costs that will ensue one to two years later. As such, this is likely to become a main issue in the Asia-Europe negotiation at the end of 2020 for 2021 and for the trans-Pacific rate negotiations in spring 2021 for contracts ranging into 2022. That brings us to the aspect of who is going to foot the bill. Bottom line is that the rules will result in added costs of $10 to 15 billion versus the baseline of no new rules — with the operational cost aspect declining somewhat in a couple of years due to the aforementioned scrubber effect. The carriers cannot absorb such costs, hence this has to be passed on to the cargo owners — either as increased rates/surcharges or, in the case of generally declining oil prices, as less of a rate decline than what would otherwise have been the case.

Conversely, several large BCOs have stated at public conferences that this will not, as such, result in increased prices toward the consumers. And given that ocean freight costs are typically a tiny fraction of the consumer retail prices, such a position is also logical. Hence, over the coming years, we will see increased pressure on the stakeholders located in between the carriers and the major BCOs in order to recoup the added costs. This will, therefore, intensify the cost pressure on ports, terminals, and intermediary logistics providers. Much criticism has been levied on the carriers for not preparing for the transition earlier. However, in this context it should also be kept in mind that oil companies were also not exactly quick to ramp up production and distribution of appropriate low-sulfur bunker fuel. Any short-term disruptions to supply chains in early 2020 should therefore not solely be blamed on the carriers as they are not the ones producing and distributing the fuel.

Enforcement questions

Furthermore, the national authorities who are entrusted with enforcement of the rules remain quite opaque in terms of how practically they will execute this task — and, more worryingly, what the level of fines for violations are. Given the substantial financial impact, the risk is that disproportionately small fines will encourage deliberate violations. When the low-sulfur rules were introduced in North Europe in 2015, it essentially took the authorities about a year before effective enforcement was in place, including appropriate penalty schemes

This brings us back to the shippers. Whereas it is not the role of shippers to act as an enforcement agency vis-à-vis IMO 2020, they do potentially have a role to play nonetheless. In an environment wherein not all national authorities are capable of, or willing to, enforce the rules — or a low level of fines makes it opportune to violate the rules — shippers can simply choose to shift part of their cargo away from carriers which are seen to deliberately flaunt the rules. This might prove to be an important impetus in setting the scene for a stable, well-regulated, and well-enforced environment in 2021.

Finally, beyond 2022, there is the issue of liquefied natural gas (LNG)-powered vessels. In 2020-2022, the impact of such vessels is very marginal simply because there are very few of them. From a pure sulfur perspective, these resolve the issue perfectly and an uptake in orders of LNG vessels might very well be seen. If that begins to happen in earnest, the commercial impact on the markets will be felt in 2023-2025 when a new generation of vessels are phased in.

Source: https://www.joc.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 29 November 2019	Current Index 6 December 2019
Comprehensive Index			819.63	850.27
Service Routes				
Europe (Base port)	USD/TEU	20%	766	800
Mediterranean (Base port)	USD/TEU	10%	730	771
USWC (Base port)	USD/FEU	20%	1405	1509
USEC (Base port)	USD/FEU	7.50%	2684	2638
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	835	930
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	816	760
East/West Africa (Lagos)	USD/TEU	2.50%	2290	2259
South Africa (Durban)	USD/TEU	2.50%	996	996
South America (Santos)	USD/TEU	5.00%	1667	1747
West Japan (Base port)	USD/TEU	5.00%	229	226
East Japan (Base port)	USD/TEU	5.00%	244	241
Southeast Asia (Singapore)	USD/TEU	7.50%	158	158
Korea (Pusan)	USD/TEU	2.50%	120	121

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