

การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 50 พ.ศ. 2562



สรุปค่าระวางเรือประจำสัปดาห์

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	SIZE		Low Sulphur Surcharge (LSS)	Remark
	USD/20'	USD/40'		
Thailand - Shanghai	200	300	Subject to ISOCC USD 60/TEU, USD 120/FEU	Effective till 31-Dec.-2019
Thailand - Qingdao	300	450		
Thailand - Hong Kong	100	200		
Thailand - Japan (Main Port)	300	400		
Thailand - Klang	300	500	Subject to ISOCC USD 40/TEU, USD 80/FEU	
Thailand - Jakarta	400	600		
Thailand - Hochiminh	250	350		
Thailand – Manila	300	450		
(North & South)	Subject to CIC at destination			
Thailand - Jebel Ali	500	750	Subject to ISOCC USD 97/TEU, USD 194/FEU	
	Subject to War Risk Surcharge: USD 35/TEU, USD 70/FEU			
Thailand - South Korea (Busan)	50-80	150	USD 70/TEU, USD 140/FEU	
Thailand - South Korea (Incheon)	150	300		
Thailand - Melbourne	325-575	650-1,050	USD 106/TEU, USD 212/FEU	
Thailand – Durban / Cape Town	900	1700	Subject to ISOCC USD 136/TEU, USD 272/FEU	
	Subject to SCMC USD 30/BL			
Thailand - Europe (Main Port)	800	1,500	LSS: USD20/TEU, USD40/FEU + ISOCC: USD106/TEU, USD212/FEU	
	Subject to ENS USD30/BL			
Thailand - US West Coast	1,080	1,350	-	
Thailand - US East Coast	2,200	2,650		

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

สถานการณ์ค่าระวางในช่วงเดือนธันวาคม 2562 อัตราค่าระวางในเส้นทางเอเชียส่วนใหญ่คงที่ไม่มีเปลี่ยนแปลง 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 สำหรับเส้นทางแอฟริกาใต้ช่วงครึ่งเดือนหลังของเดือนธันวาคม ค่าระวางตู้ 20' เพิ่มขึ้น 50 USD/TEU ในขณะที่ตู้ 40' เพิ่มขึ้น 100 USD/FEU ทำให้ค่าระวางอยู่ที่ 900 USD/TEU 1,700 USD/FEU

สำหรับเส้นทาง Europe ค่าระวางช่วงครึ่งเดือนหลังของเดือนธันวาคม ปรับเพิ่มขึ้น 100 USD/TEU และ 200 USD/FEU ทำให้ค่าระวางอยู่ที่ 800 USD/TEU และ 1,500 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

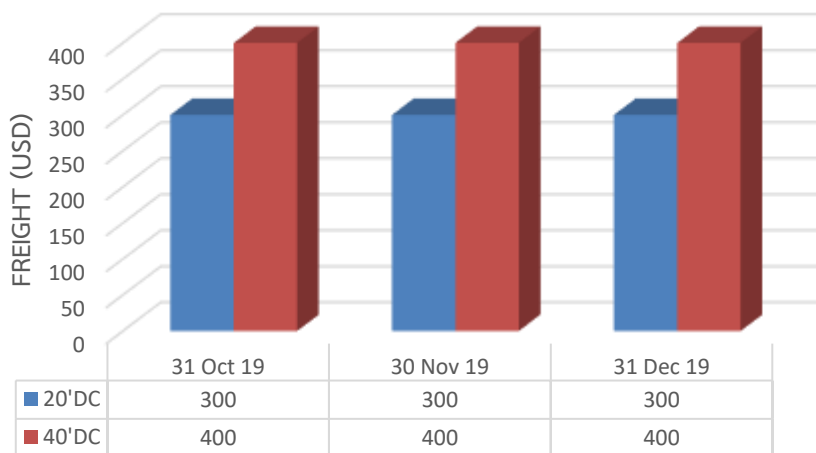
ในขณะที่เส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนหลังของเดือนธันวาคม ค่าระวางฝั่ง West Coast ปรับลดลง 220 USD/TEU และ 250 USD/FEU ทำให้ค่าระวาง อยู่ที่ 1,080 USD/TEU และ 1,350 USD/FEU ในขณะที่ฝั่ง East Coast ค่าระวางตู้ 20' คงที่ ส่วนตู้ 40' ปรับลดลง 50 USD/FEU ทำให้ค่าระวางอยู่ที่ 2,200 USD/TEU และ 2,650 USD/FEU

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

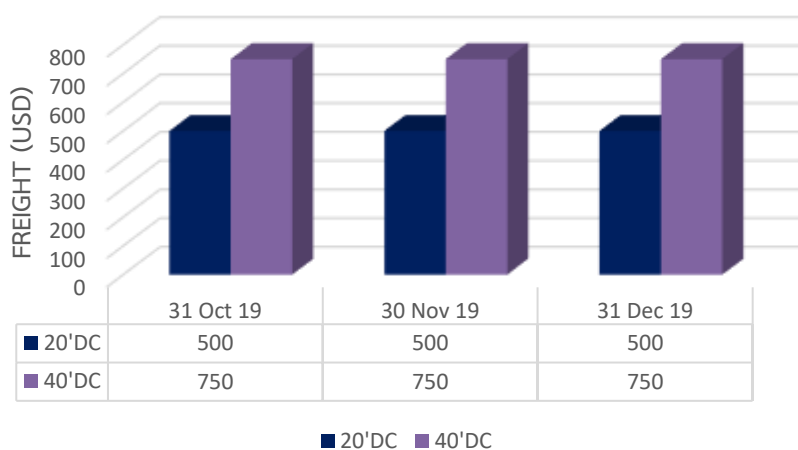
JAPAN



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

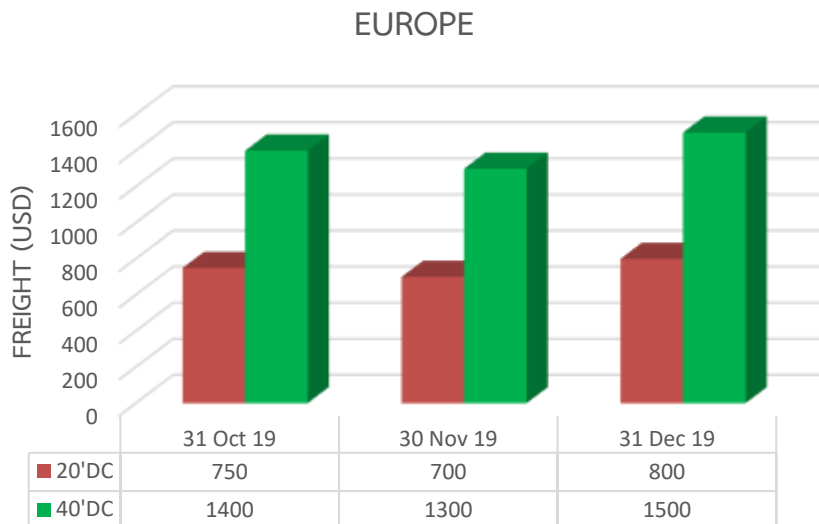
JEBEL ALI



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



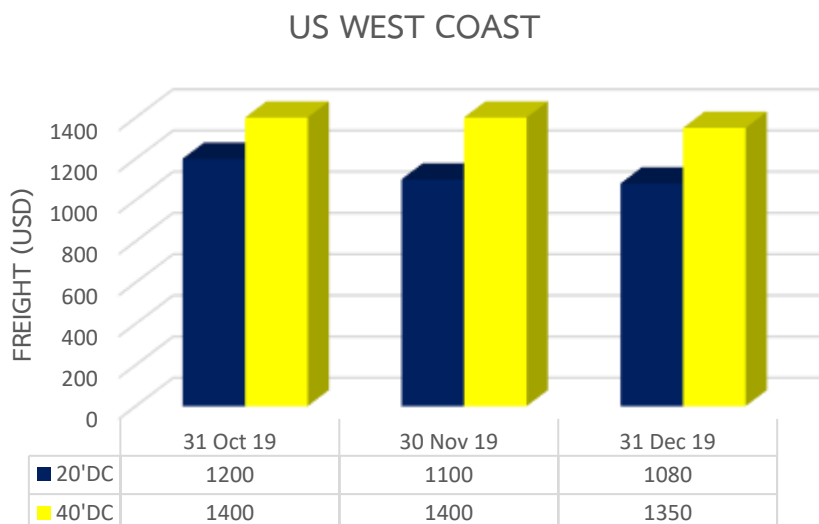
December is subject to

ENS: USD30/BL

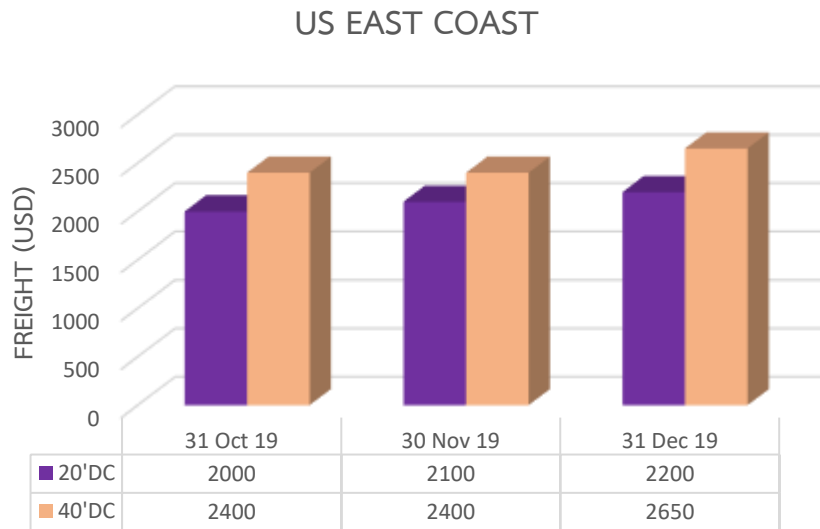
Low Sulphur Surcharge: USD20/TEU และ USD40/FEU

ISOC: USD106/TEU และ USD212/FEU

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



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



รวบรวมประกาศการปรับค่าใช้จ่ายจากสายเรือ

สายเรือ Hapag Lloyd

- ประกาศปรับการเรียกเก็บค่า IMO Transition Charge (ITC) สำหรับสินค้าจากเส้นทาง East Asia ไปยังเส้นทางสหรัฐอเมริกา และแคนาดา ดังต่อไปนี้
เริ่มตั้งแต่วันที่ 1 ถึง 31 ธันวาคม 2562
 - North America (USA and Canada) West & East Coast: USD 130 per TEU
เริ่มตั้งแต่วันที่ 1 มกราคม 2563
 - North America (USA and Canada) West Coast: USD 95 per TEU
 - North America (USA and Canada) East Coast: USD 150 per TEU
- ประกาศเรียกเก็บค่า General Rate Increase (GRI) สำหรับสินค้าจากเส้นทาง East Asia ไปยังเส้นทางสหรัฐอเมริกา และแคนาดาในอัตรา USD 560/TEU และ USD 700/FEU โดยมีผลตั้งแต่วันที่ 15 มกราคม 2563

สายเรือ CMA CGM

- ประกาศเรียกเก็บค่า Rate Restoration Surcharge (GRR) สำหรับสินค้าจากเส้นทางเอเชียไปยัง Mauritius, Tamatave (Madagascar), Seychelles, The Maldives, Kenya, Tanzania (all ports), Mozambique (all ports), Mogadishu, Somalia และ South Africa (all ports) ในอัตรา USD 300/TEU และ USD 600/FEU โดยมีผลตั้งแต่วันที่ 1 มกราคม 2563

Ocean freight prices rebounding after post-peak dip

Spot rates showing signs of recovery with several lanes seeing freight rates surpassing their levels in November, due to changes on both the supply and demand side – notably higher fuel surcharges ahead of IMO 2020. Ocean freight spot prices are showing signs of rebounding following a post-peak dip, with several lanes seeing freight rates surpassing their November highs, due to changes on both the supply and demand side.

Based on data from the Freightos Baltic Index, digital rates specialist Freightos highlighted a number of factors behind the recent recovery in prices, notably higher bunker surcharges to compensate lines for higher

fuel costs ahead of the introduction of new global low-sulphur fuel rules next year, noting: “Chief among supply drivers is the start of low sulphur fuel oil (LSFO) or scrubber installation costs being passed on to shippers ahead of the 1 January IMO fuel regulations roll out. The approaching close of Asia-EU long term contract negotiations is also causing some carriers to reduce capacity and push up spot prices, while scrubber installations are also accounting for some of the depleted supply.”

Eytan Buchman, CMO at Freightos, added: “On the demand side, advance ordering in anticipation of the early Chinese New Year (January 25) is already pushing prices up and should continue to do so well into mid-December.” He highlighted rises in transpacific prices. According to the Freightos Baltic Index, China-US West Coast prices “shot up 13% since last week, reaching \$1,507/FEU. Prices are 27% behind last year’s rate, but 39% higher than 2017’s prices for the same week,” the company noted.

Meanwhile, China-US East Coast prices are up a more moderate 8% from last week to \$2,823/FEU, “surpassing its peak season high. This gain closes the gap with last year to just a 16% drop, but represents a 53% gain on the same week in 2017,” Freightos noted. Other indicators tell a broadly similar story. The composite Shanghai Containerised Freight Index rose 3.7% last week, following a 7.1% rise the previous week. Asia-Europe rates were up \$34 per teu, or 4.4%, to \$800 per teu, while on the transpacific, Asia-US west coast rates added to the previous week’s 14.5% rise with a further 7.4% increase, taking spot rates to \$1,509 per feu, Lloyd’s List reported.

And Drewry’s World Container Index also saw rising rates, with the average composite index for the year to date standing \$1,415 per feu, \$18 higher than the five-year average of \$1,397 per feu. But rates are still 29% lower when compared with the previous year, when front loading led to a surge in demand, Lloyd’s List noted.

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

Container lines increase detention/demurrage penalties

Four ocean carriers have informed customers in recent weeks of an increase in detention and demurrage penalties for 2020 amid a larger Federal Maritime Commission (FMC) investigation into the practice, including whether the charges are reasonable. The increases run from \$10 per day to nearly \$100 per day, including a new \$75-per-container fee for a customs inspection. The size of the fees and what expenses they’re intended to cover are a sensitive subject to beneficial cargo owners (BCOs).

A group representing BCOs petitioned the FMC to intervene because they believe carriers unfairly use detention and demurrage as revenue generators. Carriers and terminal operators counter that the fees cover storage costs and lost business opportunities when containers are not turned over quickly.

The FMC is reviewing a proposed rule that would establish a platform for BCOs to file complaints about fees and provide a framework to determine their reasonableness on a case-by-case basis. The agency is reviewing comments received in September and October before making a final decision.

Hapag-Lloyd changes effective Jan. 7, 2020

Hapag-Lloyd will be hiking some of its detention and demurrage fees next month. Demurrage on temperature-controlled containers will rise \$50 to \$350 per day after two working days on the West Coast, and by \$25 to \$375 per day after two working days in Savannah, Georgia, and Houston. Demurrage on dry boxes will not change at the ports but will go up \$10 to \$130 per day after two working days for inland ports and inland rail yards. Detention fees will not rise on imports or exports, but a new level of penalties has been introduced if a shipper is more than 14 days late on returning equipment. The carrier confirmed the changes but did not provide any context behind the decision.

ZIM raises demurrage fees

Zim Integrated Shipping Services has raised demurrage fees at the Port of New York and New Jersey; Baltimore, Maryland; Jacksonville, Florida; and Mobile, Alabama. The first level of demurrage penalties has risen \$50 to \$285 per day. The second-tier penalty, if a BCO still doesn't retrieve a container, has gone up \$90 to \$380 per day. Zim also announced the terminal will invoice BCOs for demurrage rather than the carrier. Avner Shats, a spokesperson for Zim, said the changes will standardize demurrage billing practices that previously differed by port.

"In the majority of ports to which we provide service, terminal storage fees and carrier demurrage charges were published as a unified 'demurrage' charge, while in a number of other ports, those charges were published as separate charges and subject to separate invoice and collection procedures," Shats told JOC.com. "In order to provide a consistent and more simplified billing process for our customers, we approached the relevant terminal operators seeking to combine the charges." He added that while the fees are higher in Baltimore, Jacksonville, and Mobile, they do not represent "a substantial increase in costs for the merchant."

CMA CGM will institute a \$10 increase on the first level of demurrage for all dry containers starting Jan. 5. In New York and New Jersey, the new base penalty will be \$280 per day after four working days, and \$245 at all other US ports. Demurrage will also go up \$10 to \$595 per day on refrigerated containers in New York and New Jersey after two working days. Gradually higher penalties kick in on days eight and 13 for dry containers and days six and 10 for temperature-controlled containers. Those escalators will also go up.

APL will charge for customs holds on Jan. 1, 2020

APL on Jan. 1 will assess cargo owners a new \$75-per-container fee when a container is held for customs inspection, the first known US example of a "customs clearance administrative charge." It will apply for any inspection by US Customs Service, US Department of Agriculture, Environmental Protection Agency, US Coast Guard, or any agency working on behalf of the US government.

An APL spokesperson confirmed notice of the fee was sent to customers earlier this month but declined to identify what expenses it's attempting to recover through the charge. It would hurt meat importers in particular because all products are subject to a full USDA inspection. Stephen Sothmann, associate director of the Meat Import Council of America, said the association is looking into APL's announcement.

Source: <https://www.joc.com/>

IMO warns against 'trouble' and 'confusion' for global decarbonization efforts amid EU emissions push

In a moment of *deja vu*, the IMO finds itself addressing the policy of the EU towards GHG emissions. Only this time, the effort to regulate shipping emissions on an EU level is larger and appears more forceful. IMO secretary general Kitack Lim argues that the IMO is making real progress on GHG and cautioned against putting negotiations in 'difficulties'. The IMO secretary general says he intends to travel to Brussels, while industry lobbies express concerns over Commission and Parliament intention to regulate shipping emissions.

THE INTERNATIONAL Maritime Organization has warned against the disruption of global decarbonisation progress, in response to the European Commission's push to regulate shipping emissions. "If we want real progress, the process of IMO discussions should not be [jeopardised]," IMO secretary general Kitack Lim told Lloyd's List during an interview on Wednesday. Earlier that day, European Commission president Ursula von der Leyen unveiled her Green Deal, in which she formalised the Commission's intention to include maritime in the EU Emissions Trading System, a move strongly supported by the European Parliament but vehemently opposed by some of the most powerful shipping interests.

The IMO has long opposed maritime inclusion in the ETS, which caps companies' permitted carbon emissions and lets them purchase allowances to emit more. "We have to make progress. We do not want to put the IMO meetings [on greenhouse gas emissions] in difficulties," Mr Lim said. His warning echoes a familiar line of criticism held by opponents of the Commission's aspirations regarding emissions; regional measures will disrupt the agreed global approach at the IMO, which has taken years to develop and is still being implemented, the argument goes. Proponents of the EU taking the lead suggest it will help reduce emissions and accelerate the development and uptake of low and zero carbon fuels, as burning fossil fuels become more expensive. Speaking after the Green New Deal was unveiled on Thursday, Mr Lim praised the IMO's progress on GHG emissions so far. He claimed the organisation had done "excellently" since the EU decided to temporarily leave maritime outside of the ETS, back in late 2017. The IMO adopted a landmark initial GHG strategy in April 2018.

"The IMO is making normal, successful progress...according to the initial strategy. We are making progress towards 2023," he said. Looking ahead, 2023 is the year when the IMO is set to revise its strategy, including its landmark targets. It is also the effective deadline the EU had given to the IMO to adopt a satisfactory global measure to hold back from including shipping in the ETS. "We have to make progress towards 2023, anticipating the 2050 targets," he said, adding that nobody would want to cause confusion in this effort. If the Commission and the Parliament do not change their minds and if they can convince the Council to agree to add shipping in the ETS, the industry will have its first market-based measure on emissions. Mr Lim emphasised that the IMO will also consider potential market based measures for shipping.

But those discussions at the IMO are expected further into the future when a revised strategy will have replaced the existing one. According to the GHG strategy's timeline, member states could agree on market based measures after 2023, but with no commitment thus far to introduce any of them. Mr Lim said a key part of his strategy is to continue communication with the EU, which he said the two sides have established since 2016 and for which he thanked the last Commission. Mr Lim said he plans on visiting Brussels some time in February to meet with members of the new Commission and Parliament. "Once we talk, we [will] realise we are pursuing and seeking certain common targets," he said.

One of the things he wants the IMO to do is explain to MEPs the impact that measures can have on shipping. When the European Parliament was pushing for the inclusion of shipping in the ETS in 2017, Mr Lim had worked hard to prevent shipping's inclusion in the ETS via public and private interventions. He openly criticised the move, urging Brussels to reconsider and met with EU stakeholders to push for the continuation of global emissions regime. Mr Lim stressed that at the time that EU governments put their trust in the IMO and that the Commission had congratulated the organisation for its achievement in adopting the GHG strategy.

This time around, the secretary general is hopeful a similar approach founded on communication can have the same end, although he admitted his rationale that has not always been popular, even within IMO circles. "I was discouraged by several people when I wanted to go to Brussels in 2016," he said. Even now, some people argue that it should be the EU coming to London to speak with a UN agency, rather than the other way around, he explained. But Mr Lim believes the approach does not matter so long as the target is achieved. "If this belief — my position — is not working, it is a failure to myself. But I believe it works," he said.

Industry warns Commission to against ETS pursuit

The IMO's sentiments about the potential of an EU-based measure are shared by influential actors in maritime, particularly from the shipowning side. Industry groups have long argued against regional measures,

such as the ETS, claiming it would stifle progress for global decarbonisation and also penalise only one part of the global fleet. The International Chamber of Shipping, whose members are national shipping associations accounting for more than 80% of the global fleet, said it recognises the Commission's good intentions but fears they could be counterproductive to reducing emissions globally.

Progress on the implementation of the IMO GHG strategy is happening with the full support and goodwill of non-EU member states, ICS deputy secretary general Simon Bennett said. "If the EU proceeds with regional measures with application to non-EU flag ships calling at EU ports, this could undermine the positive momentum that now exists at IMO," he told Lloyd's List. BIMCO, the world's largest shipping association, also strongly disapproved of the measure. "BIMCO has long held the view that the ETS is unsuitable for the international shipping industry as it is a regional scheme which cannot effectively have any impact on shipping's global emissions," BIMCO deputy secretary general Lars Robert Pederson told Lloyd's List. He recognised that the Commission's Green New Deal acknowledges the role of the IMO in global decarbonisation. "However, suggesting that the proceeds raised on allowances purchased by international shipping should go to fund the EU budget is not something that IMO member states from outside the EU are likely to applaud," he added.

The World Shipping Council, the largest container shipping association, deemed the IMO to be the "only practical forum for reducing GHG emissions from international shipping". "A global industry needs a global solution," the WSC said in a statement to Lloyd's List. It emphasised that the Commission actually recognises the IMO's importance in its Green Deal and forecast that 2020 would be a "very active year" for the development of GHG solutions. "Those of us in the discussion will do the most good by asking ourselves and each other whether the solutions we collectively propose will deliver real reductions and will move us away from fossil fuels and towards finding the low and no-carbon fuels of the future," the WSC said.

National European groups also expressed issues with the Commission's plans. Danish Shipping welcomed the ambitions of the Green Deal but said it was sceptical of the intended extension of ETS onto maritime and argued that any actions the EU takes can be implemented by the IMO to apply to a global scale. The German Shipowners' Association, known as VDR, also endorsed the Green Deal but warned that the ETS would not actually help reduce emissions, just make carbon more expensive. The focus should instead be on progress at the IMO.

"This is why we need a highly skilled diplomatic European Commission and EU member states in London with strong negotiating skills that, together with other important shipping nations of this world, will contribute towards driving the ambitious objectives of the IMO forward on a global scale — in the interests of global climate protection and fair competition in our international industry," VDR chief executive Ralf Nagel said in a statement.

Source: <https://lloydslist.maritimeintelligence.informa.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 6 December 2019	Current Index 13 December 2019
Comprehensive Index			850.27	880.44
Service Routes				
Europe (Base port)	USD/TEU	20%	800	893
Mediterranean (Base port)	USD/TEU	10%	771	1083
USWC (Base port)	USD/FEU	20%	1509	1370
USEC (Base port)	USD/FEU	7.50%	2638	2512
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	930	1017
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	760	740
East/West Africa (Lagos)	USD/TEU	2.50%	2259	2209
South Africa (Durban)	USD/TEU	2.50%	996	993
South America (Santos)	USD/TEU	5.00%	1747	2014
West Japan (Base port)	USD/TEU	5.00%	226	226
East Japan (Base port)	USD/TEU	5.00%	241	241
Southeast Asia (Singapore)	USD/TEU	7.50%	158	158
Korea (Pusan)	USD/TEU	2.50%	121	121

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