การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 10 พ.ศ. 2562

สรุปค่าระวางเรือประจำสัปดาห์

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	SIZE		Remark
	USD/20’	USD/40’	
Thailand - Shanghai	250	450	Effective till March 31, 2019
Thailand - Qingdao	300	400	
Thailand - Hong Kong	100	200	
Thailand - Kelang	300	500	
Thailand - Jakarta	400	600	
Thailand - Hochiminh	250	350	
Thailand - South Korea (Busan)	100	200	
Thailand - South Korea (Incheon)	200	400	
Thailand - Japan (Main Port)	300	400	
Thailand - Jebel Ali	600	1,000	
Thailand - Melbourne	400	800	Effective till March 31, 2019
Thailand - Europe (Main Port)	900	1,700	Effective till March 31, 2019
Thailand - US West Coast	1,600	2,000	Effective till March 14, 2019
Thailand - US East Coast	2,400	3,200	

สถานการณ์ค่าระวางในช่วงเดือนมีนาคม 2562 อัตราค่าระวางมีการปรับตัวเพิ่มขึ้นในบางเส้นทาง สำหรับเส้นทางที่อัตราค่าระวางปรับเพิ่มขึ้น ได้แก่ เส้นทาง Shanghai โดยปรับเพิ่มขึ้น 50 USD/TEU และ 150 USD/FEU ทำให้อัตราค่าระวางอยู่ที่ 250 USD/TEU และ 450 USD/FEU เนื่องจากเป็นช่วงพีคในการขนส่งสินค้าประเภทแป้ง โดยคาดการณ์ว่าสถานการณ์จะยาวไปถึงช่วงประมาณเดือนเมษายน และอีกเส้นทางที่ค่าระวางปรับเพิ่มขึ้นเช่นเดียวกัน ได้แก่ เส้นทาง Jebel Ali โดยปรับเพิ่มขึ้น 200 USD/TEU และ 400 USD/FEU ทำให้อัตราค่าระวางอยู่ที่ 600 USD/TEU และ 1,000 USD/FEU เนื่องจากมีการจองระวางเป็นจำนวนมาก ทำให้ space ค่อนข้างแน่น

ส่วนเส้นทางอื่น ๆ ส่วนใหญ่อัตราค่าระวางยังคงที่ไม่เปลี่ยนแปลง โดยเส้นทาง Hong Kong ค่าระวางคงที่อยู่ที่ 100 USD/TEU และ 200 USD/FEU, เส้นทาง Kelang ค่าระวางอยู่ที่ 300 USD/TEU และ 500 USD/FEU, เส้นทาง Japan ค่าระวางอยู่ที่ 300 USD/TEU และ 400 USD/FEU และเส้นทาง Europe อัตราค่าระวางคงตัวเช่นเดียวกันอยู่ที่ 900 USD/TEU และ 1,700 USD/FEU และมีการเรียกเก็บค่า Low Sulphur Fuel Surcharge (LSS) ที่ต้นทางในอัตราเดิม คือ 20 USD/TEU และ 40 USD/FEU

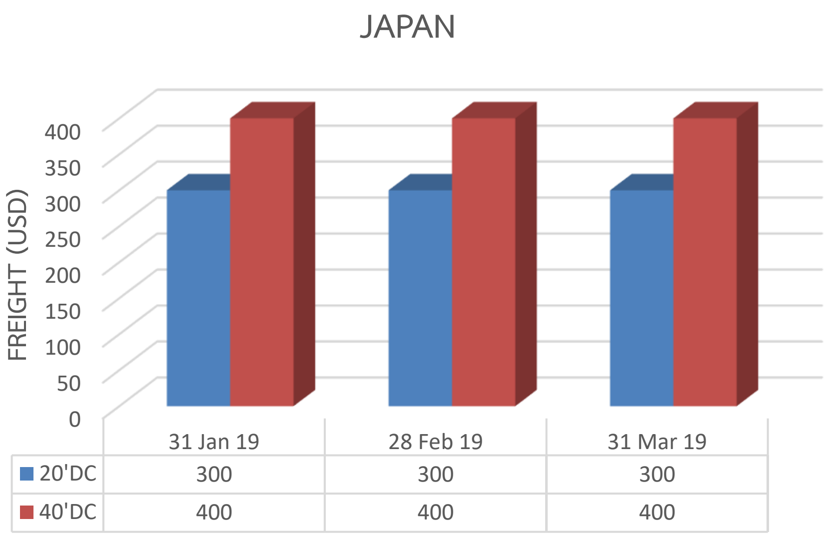
ในหลายเส้นทางที่อัตราค่าระวางมีการปรับตัวลดลง เนื่องจากยังไม่ถึงช่วงพีคของการขนส่ง ได้แก่ เส้นทางสหรัฐอเมริกา โดยค่าระวางปรับลดลง 200 USD ต่อตู้ ทำให้อัตราค่าระวางในฝั่ง West Coast อยู่ที่ 1,600 USD/TEU และ 2,000 USD/FEU และอัตราค่าระวางทางฝั่ง East Coast อยู่ที่ 2,400 USD/TEU และ 3,200 USD/FEU และอีกเส้นทางที่ค่าระวางปรับตัวลดลง คือ เส้นทาง Australia โดยปรับลดลง 100 USD/TEU และ 200 USD/FEU ทำให้อัตราค่าระวางอยู่ที่ 400 USD/TEU และ 800 USD/FEU

CONTAINER FREIGHT RATE (REEFER)

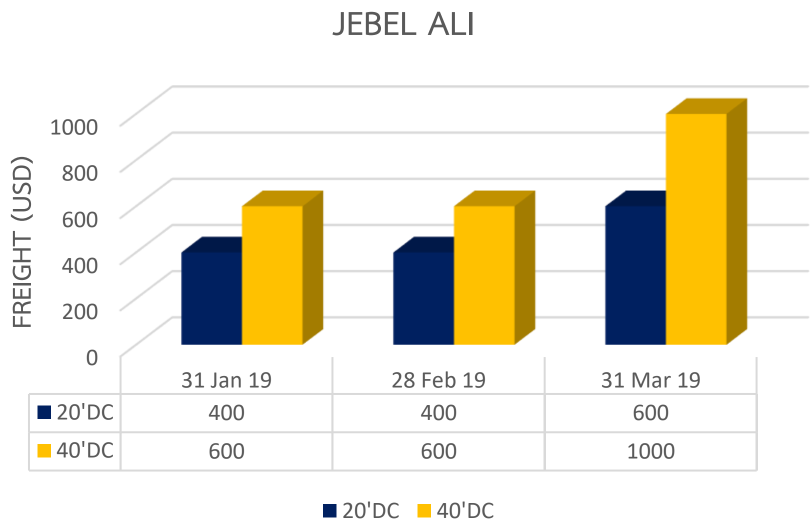
ROUTE	SIZE		Remark
	USD/20’	USD/40’	
Thailand-Hong Kong	800	1,000	Effective till March 31, 2019
Thailand-Shanghai	900	1,100	
Thailand-Japan (Tokyo, Yokohama)	900	1,200	Effective till March 31, 2019
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,400	1800	

- สำหรับเส้นทางไปประเทศจีน และฮ่องกง มีการเรียกเก็บค่า Low Sulphur Surcharge (LSS) ที่ปลายทาง ในอัตรา 20 USD/TEU และ 40 USD/FEU
- เรียกเก็บค่า Bunker Surcharge (OBS) ในเส้นทางไปญี่ปุ่น ในอัตรา 16 USD/TEU และ 32 USD/FEU ในขณะที่เส้นทางไปยุโรปมีการปรับลดค่า OBS โดยเรียกเก็บในอัตรา 85 USD/TEU และ 170 USD/FEU

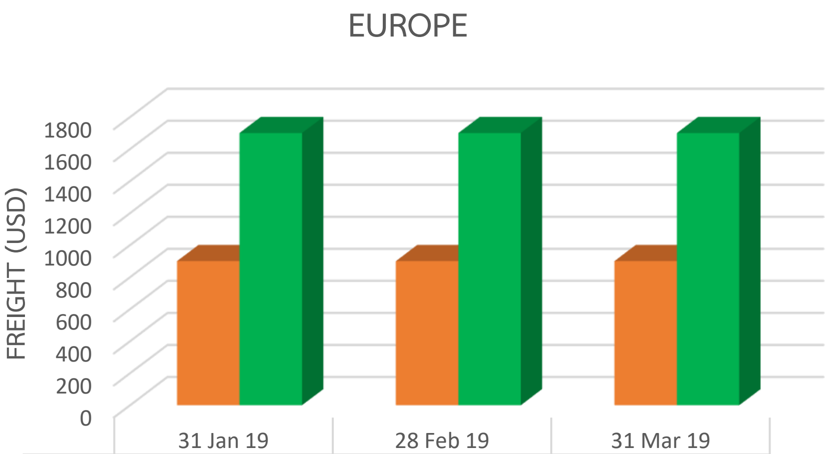
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ญี่ปุ่น เดือน ม.ค. ถึง มี.ค. ปี 2562



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

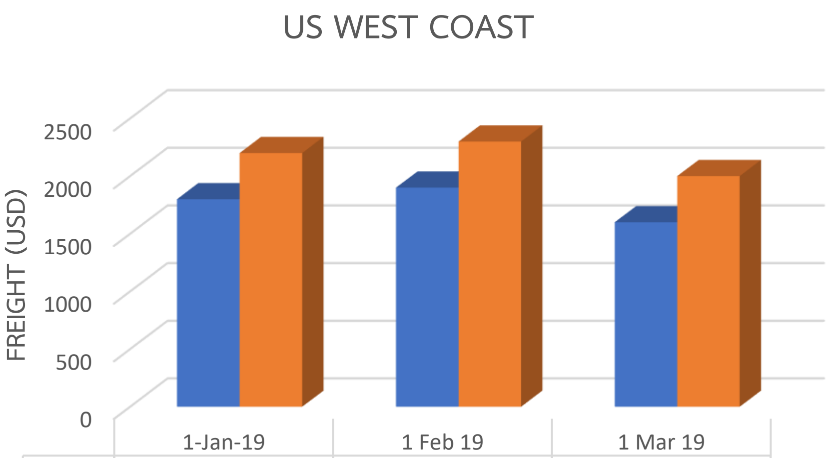


<u>กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต</u>
<u>ในเส้นทาง ไทย-ยุโรป เดือน ม.ค. ถึง มี.ค. ปี 2562</u>



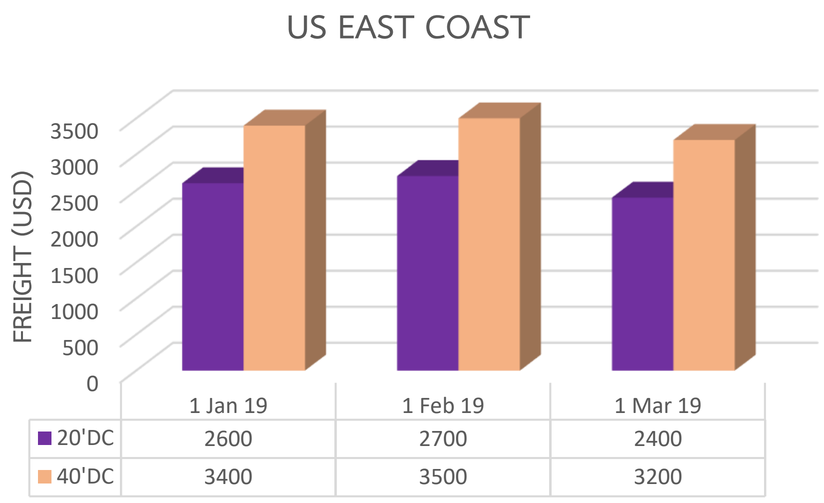
	31 Jan 19	28 Feb 19	31 Mar 19
20'DC	900	900	900
40'DC	1700	1700	1700

<u>กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต</u>
<u>ในเส้นทาง ไทย-สหรัฐอเมริกา West Coast เดือน ม.ค. ถึง มี.ค. ปี 2562</u>



	1-Jan-19	1 Feb 19	1 Mar 19
20'DC	1800	1900	1600
40'DC	2200	2300	2000

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



รวบรวมประกาศจากสายเรือเรื่องการปรับการเรียกเก็บค่าใช้จ่าย

สายเรือ Hapag Lloyd

- ประกาศปรับเพิ่มการเรียกเก็บค่า Marine Fuel Recovery Surcharge (MFR) สำหรับสินค้าจากเส้นทาง East Asia (รวมประเทศไทย) ส่งออกไปยังเส้นทางต่าง ๆ ในอัตราดังต่อไปนี้ **โดยจะเริ่มมีผลบังคับใช้ตั้งแต่วันที่ 2 เมษายน 2562**

Route	MFR (USD/TEU)	Route	MFR (USD/TEU)
South America West Coast	260	West Africa	268
Central America / Caribbean	221	South Africa	182
South America East Coast	255	East Africa	168
North America East Coast	248	Middle East	134
North America West Coast	127	Indian Subcontinent	140
South Europe	194	Intra East Asia	85
North Europe	208	Oceania	159

Mixed outlook for ocean freight

Further rates declines likely in the coming weeks, and the demand outlook thereafter is likely to vary, with lines making more-strenuous efforts this year to balance supply and demand, according to MSI. Ocean freight rates are likely to see further declines in the coming weeks and the demand outlook thereafter is “mixed”, according to Maritime Strategies International. However, the analyst believes the heavy losses suffered by lines in the first six months of last year will be avoided this year as strenuous efforts are made to balance supply and demand. “While we expect further downward movement in spot rates in the near term, we expect capacity control on the part of carriers will limit the downside,” said the analyst.

“There are clear risks on the demand side as the Eurozone and US economies slow - and the latter contends with inventory build - but provided our baseline demand projections hold up we expect most liner companies will avoid the extensive loss-making seen over H1 (first half of) 2018.” During April, MSI expects average Asia-Europe spot rates of $730 per TEU, increasing to $930 per TEU in July. “We expect the Transpacific trades will see year-on-year improvement in the near-term, but by the summer rates will sit comfortably below the peak-season levels achieved in 2018,” added MSI.

Transpacific rates have been suffering their usual seasonal price tumble in recent weeks with rates from China to the US West Coast down around a quarter this week at $1,585 per FEU compared to their pre-Chinese New Year high of $2,110 per FEU on January 20, according to Freightos. “This is the 39th straight week that China-West Coast rates have been higher, year on year,” Philip Blumenthal, VP of *Freightos* Baltic Index (FBX), reported yesterday. “For China-East Coast it’s 40 weeks.” He said chronic oversupply had put downward pressure on rates in 2017, but a combination of trade war advance shipping and greater carrier discipline had acted as a counterbalance last year.

As reported this week in *Lloyd’s Loading List*, container shipping analyst Drewry expects further low demand growth this year on the key Asia-North Europe trade, forcing container lines to look to other trades for their big ships and to adopt a “creative approach to capacity management” – if they wish to repeat the mild upwards spot rate trend of last year. Drewry noted that demand in North Europe for container imports from Asia “only mustered a meagre 1.5% uplift in 2018”, according to data derived from CTS, adding that the annual westbound increase fell marginally short of Drewry’s forecast for the year of 1.8%, “as growth in 4Q18 landed slightly below expectations, although it did manage a year-high quarterly rate of 3.7% year-on-year”.

Last year’s performance was sufficient to lift the westbound trade over the 10 million teu threshold for the first time, Drewry noted, but it said the weak growth rate was in keeping with a long run of poor returns that carriers have endured this decade. Since 2011, the compound annual growth rate of the westbound Asia-North Europe trade “is a miserable 1.3%, which looks worse when considering the huge capital investment made to upgrade the route with Ultra Large Container Vessels (ULCVs) of 18,000 teu and above”, Drewry added. It said the headhaul market was hindered last year by lower demand in Europe’s biggest importer of Asian goods, the UK, which saw inbound volumes slide by nearly 5%, based on CTS figures. Germany, previously the second-largest market, declined by 1% and in the process lost the runners-up spot to the Netherlands, which rose by around 5%, Drewry reported. Poland was one of the biggest movers, growing its intake of Asian shipments by nearly 11%.

In December, Drewry anticipated that the westbound trade would improve by 3.8% in 2019, “predicated more on the fact that when one makes comparisons with 2018 data one is working off a weak base, but there are already signals that we may have been overly optimistic”, Drewry noted. “In January, the IMF downgraded its 2019 GDP expectations for the Eurozone by 0.3 points to 1.9%, albeit still higher than the

1.2% estimated for 2018.” Drewry said it will provide its revised outlook for the Asia-North Europe and other key East-West trades in the upcoming Container Forecaster report at the end of March. Faced with a weak demand environment last year, carriers had to get creative on the supply side last year to prop up headhaul utilisation and freight rates, including the temporary withdrawal of 2M’s AE2/Swan service and blanked voyages, Drewry noted. The 2M service is now back in operation, but carriers have persisted with missed sailings in early 2019, with 10 counted in January and 13 in February, numbers that are broadly the same as occurred in 2018, Drewry noted. With demand “unlikely to rebound prolifically this year”, carriers yet again “have the daunting challenge of absorbing new big ships into the trade”, Drewry noted. The average size of containership deployed increased by approximately 6% from the start to end of 2018 to reach 15,000 teu. That average will rise again this year as there is around 460,000 teu of ULCVs scheduled for delivery, it highlighted.

“To counter the rate-depressing impact of the newbuilds, carriers will need to think outside the box,” Drewry said. “For a start, not all of the big ships need go into Asia-North Europe and for the first time carriers are phasing them into other lanes, such as Asia-Middle East (Cosco-operated 20,000 teu units of the Ocean Alliance’s ME5 loop) and Asia-Mediterranean (2M’s AE11/Jade service). “This will take some of the pressure away from Asia-North Europe, as will slow steaming, but with a new service from the Ocean Alliance in April and upgrades elsewhere, it will be another tough year for lines.”

Asia-North Europe spot rates were buoyed by the late-2018 demand recovery and briefly surpassed the $2,000 per 40ft container marker in early 2019 for the first time since February 2017, as reported by Drewry’s World Container Index. “Prices have tumbled since, as was to be expected with an earlier Chinese New Year, and they currently reside at broadly the same level as they did at this stage of last year,” Drewry noted. “Avoiding a repeat of last year’s slump in the second quarter will be difficult with the anticipated capacity injection.”

Drewry concluded: “It will be another tough year for Asia-North Europe carriers given the low-demand prospects and large amount of new capacity coming. Repeating the mild upwards spot rate trend of last year would be a major success and may require an even more creative approach to capacity management.”

Source : www.lloydsloadinglist.com

Ocean Alliance to blank ten transpacific sailings as spot rates plummet

The Ocean Alliance has announced plans to cancel 10 transpacific sailings in March and April, as the early signs of weak volumes on the trade become reality.

The decision by APL, CMA CGM, Cosco, Evergreen and OOCL will result in some 74,000 teu culled from US west coast services and more than 35,000 teu from those destined for the east coast, according to data from *Alphaliner*. This amounts to some 15% of the capacity the alliance would normally have offered over the four-week period of the cancellations.

On Friday, *The Loadstar* reported that container spot rates from Asia to the US had been plummeting, with the Shanghai Containerised Freight Index (SCFI) recording a 10% drop for the US west coast and 7% for east coast ports. One source told *The Loadstar* that front-loading cargo to beat the pending 25% tariffs was adding to the weakness in demand on transpacific trades. And sources at the JOC TPM Conference in Long Beach this week said: “BCOs are telling us they are holding back on contract negotiations with carriers due to the weakening spot market. “The view of several BCOs is that there is ‘a way to go’ on spot rates and, as a result, they are not feeling any pressure to sign new deals.”

Last week, the US administration offered another postponement of the once “immovable” 2 March deadline for the 25% tariff hike on around $200bn of Chinese imports, tweeting that “substantial progress” had been made on trade talks. But the uncertainty has led several carriers to voice concerns over what to expect on the tradelane in the near future.

Source : www.theloadstar.com

Container lines could learn a lesson in profitability from the airlines

Container shipping lines should learn from passenger airlines if they want to improve profitability, the JOC's Transpacific Maritime conference in Long Beach heard this week. One lesson to learn is how to get better control of its costs – principally fuel, according to Neil Glynn, head of European transport equity research and global transport research coordinator at Credit Suisse. "The transatlantic airlines have great pricing control, especially in respect to how they incorporate changes in the cost of fuel," he told delegates. "If shipping lines passed on the price of fuel immediately, the bill as a percentage of total revenue would be static. But the time lag carriers currently have in reclaiming fuel costs has contributed to price volatility; and in terms of the low sulphur regulations, this doesn't give us a great deal of confidence that the higher fuel costs will be passed on.

"Transatlantic airline pricing follows fuel price movements, which also means that the market concentration in terms of the reduced numbers of carriers is working," he said. "A few years ago, there was a view that fuel prices would be passed through, but there seems a greater acceptance that it's taking longer and that causes frustration among the investor community. "2019 needs to be a very good year to give the investment community confidence that carriers will be able to manage IMO 2020." But Mr Glynn added: "There is also hope. I have had recent feedback that Cosco is now the most disciplined about recovering fuel costs, Maersk has become more disciplined and CMA CGM's forthcoming CEVA cheque might also make it more risk-averse."

In terms of the container lines' stated ambition to develop into big box versions of the express integrators, Mr Glynn said carriers would only be successful if they abandoned much of their traditional behaviour. "There's a real focus on developing solutions rather than commoditised services, but that strategy must see extra revenue added to the bottom line," he said. And he warned this could be destroyed by a return to rate wars. "We see a risk of carrier rate indiscipline, because it would be difficult for these added revenue streams to absorb the heavy losses of declining rates. Two-thirds of Maersk's revenues come from freight rates," he said.

However, he also argued that this should not put liners off the quest to develop supply chain solutions. "Look at the airline industry again – the airlines that generate ancillary revenue streams are generally the most profitable airlines. But best-in-class freight forwarder Kuehne + Nagel has seen its value-added services growth absorbed by competition in sea freight. "Kuehne + Nagel is developing a new strategy to service the volume and create better gross profit conversion through digitisation, and this is an appropriate warning sign for shipping lines looking to develop value-added services – rate discipline is going to be the most important factor," he added.

Source : www.theloadstar.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 1 March 2019	Current Index 8 March 2019
Comprehensive Index			803.71	766.92
Service Routes				
Europe (Base port)	USD/TEU	20%	796	754
Mediterranean (Base port)	USD/TEU	10%	810	776
USWC (Base port)	USD/FEU	20%	1549	1431
USEC (Base port)	USD/FEU	7.50%	2640	2479
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	639	612
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	394	383
East/West Africa (Lagos)	USD/TEU	2.50%	2522	2485
South Africa (Durban)	USD/TEU	2.50%	765	726
South America (Santos)	USD/TEU	5.00%	1498	1469
West Japan (Base port)	USD/TEU	5.00%	226	226
East Japan (Base port)	USD/TEU	5.00%	227	227
Southeast Asia (Singapore)	USD/TEU	7.50%	148	146
Korea (Pusan)	USD/TEU	2.50%	153	153

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