

การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 52 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-Jan-2020
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 (North & South)	300	450		
Thailand - Jebel Ali	500	750	Subject to ISOCC USD 87/TEU, USD 174/FEU	
	Subject to War Risk Surcharge: USD 35/TEU, USD 70/FEU			
Thailand - South Korea (Busan)	100	200	USD 70/TEU, USD 140/FEU	
Thailand - South Korea (Incheon)	150	300		
Thailand - Melbourne	275-425	550-800	FAF: USD 146/TEU, USD 292/FEU	
Thailand - Durban / Cape Town	850	1600	Subject to ISOCC USD 182/TEU, USD 364/FEU	
	Subject to SCMC USD 30/BL			
Thailand - Europe (Main Port)	850	1,600	LSS: USD20/TEU, USD40/FEU + ISOCC: USD141/TEU, USD282/FEU	
	Subject to ENS USD30/BL			
Thailand - US West Coast	1,480	1,850	-	
Thailand - US East Coast	2,700	3,250		

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

สถานการณ์ค่าระวางในช่วงเดือนมกราคม 2563 อัตราค่าระวางในเส้นทางเอเชียส่วนใหญ่คงที่ไม่มีเปลี่ยนแปลง โดยสายเรือมีการเรียกเก็บค่า Low Sulphur Surcharge เพิ่มเติมจากค่าระวางในอัตราเดิมเมื่อเทียบกับไตรมาสก่อนหน้า ดังตารางสำหรับเส้นทาง 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 มีเพียงเส้นทาง Busan ที่ค่าระวางปรับเพิ่มขึ้นเล็กน้อย 20 USD/TEU และ 50 USD/FEU ทำให้ค่าระวางอยู่ที่ 100 USD/TEU และ 200 USD/FEU สำหรับเส้นทางแอฟริกาใต้ช่วงครึ่งเดือนแรกของเดือนมกราคม ค่าระวางปรับลดลง 50 USD/TEU และ 100 USD/FEU ทำให้ค่าระวางอยู่ที่ 850 USD/TEU 1,600 USD/FEU

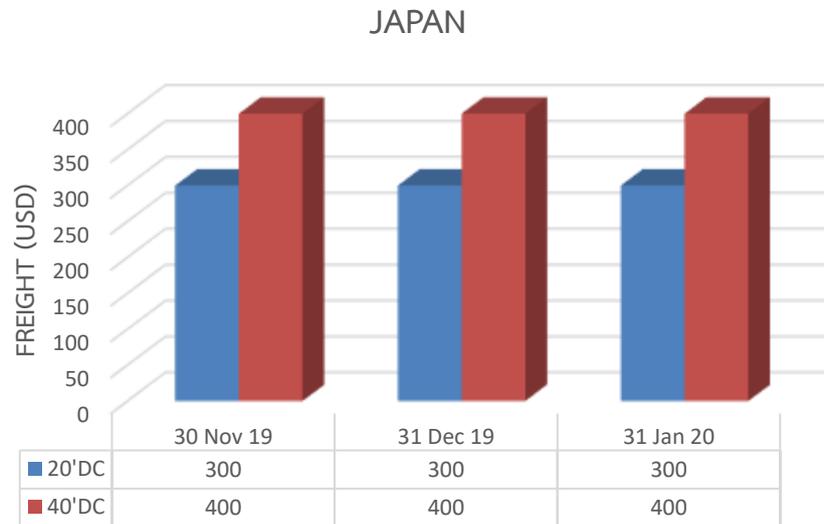
สำหรับเส้นทาง Europe ค่าระวางช่วงครึ่งเดือนแรกของเดือนมกราคม ปรับเพิ่มขึ้น 50 USD/TEU และ 100 USD/FEU ทำให้ค่าระวางอยู่ที่ 850 USD/TEU และ 1,600 USD/FEU โดยมีการเรียกเก็บค่า ISOCC ในอัตรา 141 USD/TEU ซึ่งเป็นค่าน้ำมันแยกต่างหากจากค่า LSS ส่วนเส้นทาง Australia อัตราค่าระวางเรียกเก็บอยู่ระหว่าง 275-425 USD/TEU และ 550-800 USD/FEU และมีการเรียกเก็บค่า FAF ในอัตรา 146 USD/TEU

ในขณะที่เส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนแรกของเดือนมกราคม ค่าระวางฝั่ง West Coast ปรับเพิ่มขึ้น 400 USD/TEU และ 500 USD/FEU ทำให้ค่าระวาง อยู่ที่ 1,480 USD/TEU และ 1,850 USD/FEU ในขณะที่ฝั่ง East Coast ปรับเพิ่มขึ้น 500 USD/TEU และ 600 USD/FEU ทำให้ค่าระวางอยู่ที่ 2,700 USD/TEU และ 3,250 USD/FEU

CONTAINER FREIGHT RATE (REEFER)

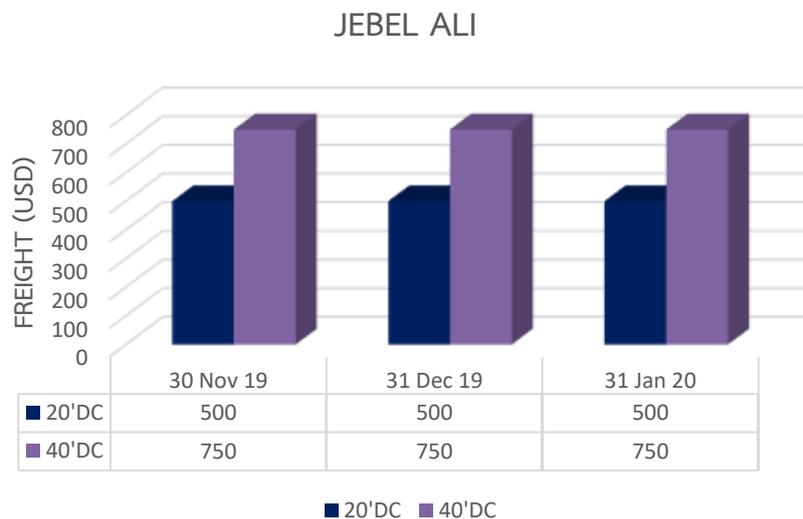
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	800	900	USD 90/TEU, USD 180/FEU	Effective till 31-Jan-2020
Thailand-Shanghai	800	900		
Thailand-Japan (Tokyo, Yokohama)	900	1,200	USD 40/TEU, USD 80/FEU	
Thailand-EU (Main Ports) (DEHAM, NLRM, FRLEH)	1,400	1800	USD 252/TEU, USD 504/FEU	

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-ญี่ปุ่น** เดือน พ.ย. 2562 ถึง ม.ค. ปี 2563



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

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-Jebel Ali** เดือน พ.ย. 2562 ถึง ม.ค. ปี 2563

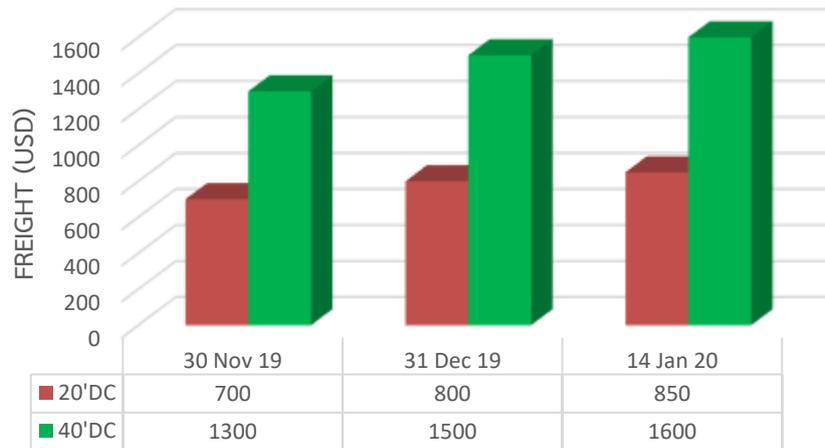


December is subject to

- War Risk Surcharge: USD35/TEU และ USD70/FEU
- Low Sulphur Surcharge: USD87/TEU และ USD174/FEU

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-ยุโรป** เดือน พ.ย. 2562 ถึง ม.ค. ปี 2563

EUROPE



December is subject to

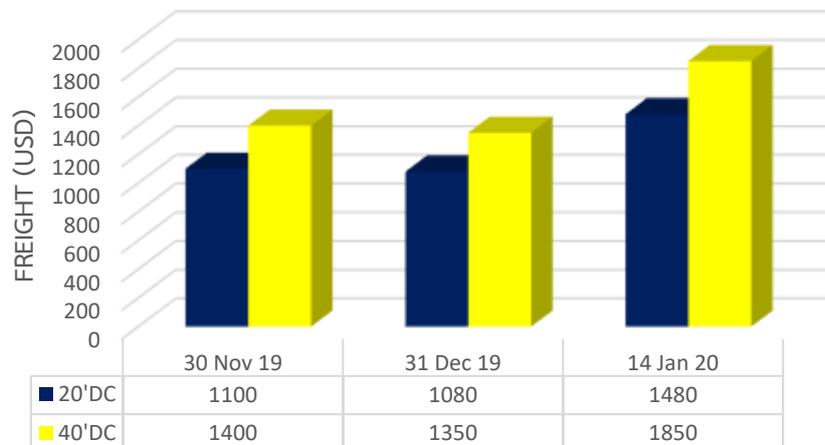
ENS: USD30/BL

Low Sulphur Surcharge: USD20/TEU และ USD40/FEU

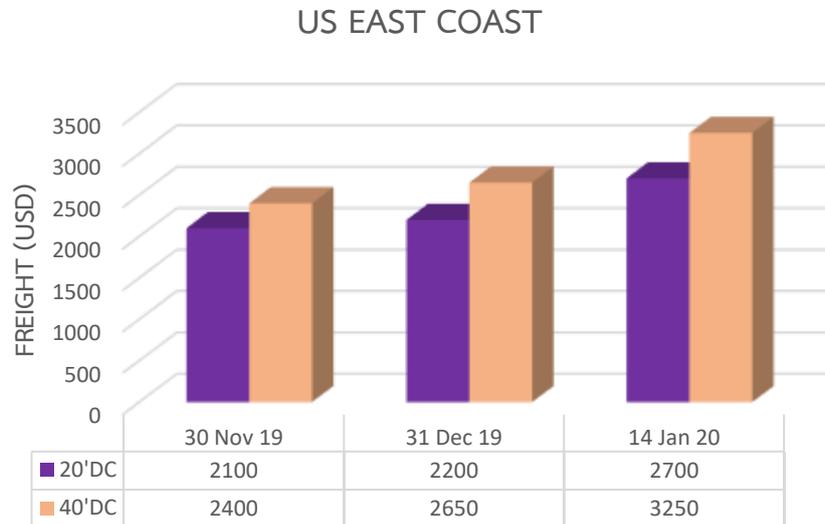
ISOC: USD141/TEU และ USD282/FEU

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-สหรัฐอเมริกา West Coast** เดือน พ.ย. 2562 ถึง ม.ค. ปี 2563

US WEST COAST



**กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-สหรัฐอเมริกา East Coast เดือน พ.ย. 2562 ถึง ม.ค. ปี 2563**



รวบรวมประกาศการปรับค่าใช้จ่ายจากสายเรือ

สายเรือ CMA CGM

- ประกาศปรับการเรียกเก็บค่า Rate Restoration Charge สำหรับสินค้าที่ส่งออกจากเส้นทางเอเชียไปยังเส้นทางสหรัฐอเมริกา และแคนาดา ในอัตรา USD 900/20', USD 1,000/40' และ USD 1,125/40'HQ โดยมีผลตั้งแต่วันที่ 15 มกราคม 2563

สายเรือ Zim Line

- ประกาศเรียกเก็บค่า Ashdod Imbalance Surcharge (AIS) สำหรับสินค้าที่นำเข้าไปยังท่าเรือ Ashdod ในประเทศอิสราเอล ในอัตรา USD 125/ตู้ โดยมีผลตั้งแต่วันที่ 16 มกราคม 2563

2019 ends on a high for leading box carriers

But lack of sulphur surcharge transparency raises market concerns, according to digital rates specialist Xeneta. 2019 is ending on a positive note for the world's leading container ship operators, with a second month of increases in long-term contracted ocean freight rates across key trading routes, analysis from digital rates specialist Xeneta shows.

According to its latest XSI Public Indices report, which provides market intelligence based on real-time crowd-sourced data from leading shippers, global rates climbed by 0.9% in December (adding to a 0.9% rise in November). "The report makes for pleasant reading for carriers in December, with the slight increase pushing the index up by 4.0% year-on-year. The rise should also be seen within the context of a 2.1% decline reported at this time last year," Oslo-based Xeneta noted. However, it highlights that despite the welcome upswing, after well over a year of steady decline (with the exception of a spike in May), major concerns remain, chief among them being market confusion over IMO 2020 sulphur surcharges.

The XSI report utilizes over 160 million data points, covering more than 160,000 port-to-port pairings, to provide insight into the very latest market moves. "It's clearly been another good month for the liner industry," comments Xeneta CEO Patrik Berglund, "but after the prolonged period of long-term contracted freight rates decline it was certainly needed! The huge spike in May, when rates soared by 11.5%, was an

anomaly, with prices continuing to fall away after that point. So, the moderate rise in November raised hopes that that established trend had been broken, and this increase seems to confirm that... for now.” That said, Berglund is quick to add a note of caution, explaining: “But, as always in this dynamic, unpredictable industry, that can change very quickly. That’s why it is essential for all parties in the container shipping value chain to keep up to date with the latest market intelligence. That really is the only way to achieve optimal value from contract negotiations.”

The XSI report breaks down developments by region, charting import and export rate fluctuations in detail. In December all key benchmarks, with one exception, gained ground. In Europe the import index increased by 1.7% and is now up 5.2% year-on-year. Exports, meanwhile, climbed by 2.0%, driving the benchmark up 3.7% compared to December 2018. Spot rates on the key Far East - North Europe trade have also been climbing steadily since the end of October. Staying in the Far East, the XSI report import figure increased by 3.8% month-on-month, but still remains 13.1% below the level reported last December. Far East exports rose by 0.6% pushing the benchmark up 2.1% year-on-year. US imports rose by 1.3% and are now up a startling 23.1% year-on-year. The US export benchmark was the only one to show a negative development in this month’s report, with a slight fall of 0.1%. Nevertheless, it remains 9.5% up year-on-year.

“Although the developments are almost universally positive, there are still key issues of concern for the industry,” says Berglund. “The trade war between the US and China is an obvious one, but hostilities are somewhat ‘on hold’ at present - with a phase-one trade agreement making it unlikely that new tariffs will be imposed in the immediate future and there are other enduring factors creating uncertainty, like our ‘old friend’ Brexit for example. “However, a somewhat newer issue is emerging in relation to transparency, or the lack of it, on surcharging for the more expensive fuel needed to comply with the IMO 2020 Sulphur cap. This is fueling growing criticism and unease within the shipper community. Carriers need to address this.”

Explaining the situation, the Xeneta CEO tells of a surprisingly large spread between surcharges - even between alliance partners. This, he argues, is causing skepticism about the true nature of the charges being imposed. “For example, ONE is charging just \$92 per TEU whilst fellow alliance member Hapag-Lloyd is proposing \$135 per TEU. Then we have 2M, with MSC charging only \$71 per TEU, while Maersk is looking to impose an additional \$116 TEU. There are different approaches here dictating pricing, but they’re not being effectively communicated. We feel there’s going to be a lot of difficult questions coming for carriers, particularly from well informed shippers tracking the fuel markets. Things will probably settle, and the spread will narrow as carriers react to changes in demand, but when?”

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

IMO 2020: the curved ball that acted as a counterweight for box shipping

The bellwether Shanghai Containerized Freight Index (SCFI), which records container spot rates from China to the major tradelanes of the world, will end 2019 on a par with last year – but, as usual, the narrative surrounding how that has been achieved is much more complex. Global container growth has slowed dramatically, with some analysts predicting expansion for the year of just 1% to 2%, compared with the 4% of 2018. A lacklustre peak season, spooked by the US-China trade war and a softening European market, confirmed the worst-case scenario for carriers’ growth predictions, resulting in the lines announcing a raft of radical blanking programmes around the Chinese Golden Week factory shutdowns, which succeeded in steadying the ship.

Meanwhile, supply growth is expected to end up at around 3.7% for the year, with over 1m teu of newbuild capacity hitting the water and, with a final scrapping number of some 200,000 teu, bringing the total containership fleet to just shy of 23m teu. A widening gap between supply and demand would usually herald

a rate collapse, with blanking programmes only acting as a sticking plaster to mask weak fundamentals, but IMO 2020 was the curved ball that acted as a counterweight in 2019. The new regulation, coming into force on 1 January, will limit the sulphur cap on marine fuel from 3.5% to 0.5%, unless ships are fitted with exhaust gas cleaning systems (commonly known scrubbers), which wash the sulphur from smoke before it is released. However, low-sulphur fuel comes at a cost, with the price difference between the current industry standard, heavy fuel oil (HFO), and compliant LSFO (low-sulphur fuel oil) expected to be some \$250 per ton. And with ULCVs burning some 80 tons of fuel a day at sea, the cost implication of IMO 2020 for container lines is, for example, \$2bn a year for Maersk and \$1bn a year for Hapag-Lloyd, according to the calculations of those carriers.

Given the substantial costs involved, bankruptcy could be a real threat for carriers if they failed to recover the extra cost of IMO 2020 from their customers. Both Maersk and Hapag-Lloyd came out early to say they intended mainly to consume LSFO on their vessels, arguing that scrubbers were not the long-term answer. However, several of their peers, including MSC, Evergreen and HMM, took an arguably more pragmatic and shorter-term view to mitigate the game-changing sulphur cap, deciding on scrubbers for many of their ships.

Currently, the economics of scrubbers are, as MSC chief executive Diego Aponte famously argued, “a no brainer”: the \$5m-\$10m cost of installation on an ultra-large containership potentially recovered in less than 18 months, depending on the tradelane. Now, with Maersk and Hapag-Lloyd arriving late to the scrubber party, demand for the technology far outstrips availability at yards. The effect was a significant tightening on the supply side of the equation, with Alphaliner reporting around 70% of the inactive containership fleet, or 1m teu, either in drydock or waiting at anchor for scrubbers to be fitted. Going forward, this is likely to result in tight supply at least for the first half of 2020. Notwithstanding whether ships have scrubbers fitted or not, carriers know they must recover their costs, and so far they have had some success in getting interim surcharges to stick on most trades – after all nobody wants to see another Hanjin.

Meanwhile, the quest continues to reach the holy grail of zero-carbon ships; carriers investing millions of dollars a year in research and development of non-fossil fuels. The liner industry in 2019 was again blighted by a spate of container fires, but real progress was made to eradicate the element of rogue shippers, as carriers took decisive action against miscreants and announced fines of up to \$35,000 for cargo misdeclaration. MSC edged closer to the shoulder of top-ranked Maersk and underpinned its game plan by poaching the Danish carrier’s highly-regarded COO, Soren Toft, as its new chief executive. And HMM’s acceptance into THE Alliance was viewed by South Korea as a redemption for the “disgrace” to the nation from the collapse of Hanjin. So, what does 2020 have in store? Trade wars, digitalisation, Brexit, further industry consolidation, mandatory speed limits for ships? These are just a few of the potential news stories that will keep *The Loadstar* as busy as ever next year and into the next decade.

Source: <https://theloadstar.com/>

ARO 2020: Shippers’ access to instant quoting, online booking expanding

This story appeared in the print edition of the Jan. 6, 2020, Journal of Commerce Annual Review and Outlook.

The ocean freight industry saw considerable progress in 2019 toward a future where instant quoting became an actual procurement option, as opposed to a theoretical concept. The question in 2020 is how and where such tools might gain further traction. Roughly half of the world’s top 12 container lines now offer shippers and non-vessel-operating common carriers (NVOs) the ability to search rates electronically and book

instantly, with others expected to join the fray soon. That's up from only two that offered the capability at the end of 2018.

Two of the three largest carriers — CMA CGM and Maersk Line — offer shippers the ability to guarantee specific sailings at the time of booking. Maersk introduced its Maersk Spot product in mid-2019, guaranteeing that cargo bookings made electronically on its website would not be rolled, in exchange for shippers guaranteeing those electronic bookings would not result in no-shows. Meanwhile, a clutch of global forwarders now offers shippers the ability to receive quotes digitally and book instantly among their universe of contract rates with container lines. These aren't trivial product developments. JOC.com reported in September that shippers and NVOs were seeing electronic quotes on par with those offered through long-term contracts, signaling that certain container lines see instant quoting as a key part of their future strategies.

Industry analyst Lars Jensen, CEO and partner of Sea-Intelligence Maritime Consulting, noted in a March 2019 LinkedIn post that, at the time, Hapag-Lloyd was 40 percent of the way toward a goal of migrating 15 percent of total sales to its online quoting platform Quick Quotes by 2023. Extrapolating that 15 percent benchmark across the entire liner shipping industry would mean that 30 million TEU of ocean freight (out of a projected 204 million TEU of total volume) would be transacted through digital channels just three years from now. This estimate, Jensen added, wouldn't even account for forwarders transacting with beneficial cargo owners (BCOs) via digital channels.

Behavioral shift

Moving into 2020, the key question for shippers primarily revolves around whether instant quoting is an impactful enough concept to change procurement behavior. In other words, will electronic quoting platforms simply enable a migration of the current spot market, will they serve purely as price discovery tools, or will shippers begin to lean on the ability to procure instantly and rely less on contract rates? Early indications are that shippers aren't eager to move away from existing procurement patterns. Quarterly or annual negotiations with carriers and NVOs enable BCOs, particularly large ones, to exert leverage and to tailor service contracts to their unique needs on an ongoing basis.

As instant quoting platforms proliferate, they will need to account for those two factors in a way that makes shippers comfortable with the new approach. They will have to account for the leverage a particular BCO brings to the transaction, but also assure the freight buyer that contracted service levels are on par. It's hard to separate other market developments — the rise of new forwarding entrants that tout their digital capabilities and container lines inching into the territory of forwarders, for example — from the growth of electronic quoting tools. With so many individual carriers and third-party logistics providers (3PLs) offering quotes, not to mention ocean freight rate marketplaces, it will be incumbent upon those providers to make buyers feel as though such tools are more than just purely transactional.

One theory about instant quoting is that it drastically reduces the amount of human resources required to produce and accept a rate. But those counting on shippers to see a reduction in costs associated with procurement as a driver to move contract volume to instant quoting may be in for a rude awakening. While, in theory, most shippers would like to reduce the length of their procurement cycles, one shipper told The Journal of Commerce that the human resource costs of ocean freight procurement are negligible compared with the benefit of ensuring that a shipper is using the right mix of service partners and at a price that's approximately in line with what the market is paying.

Indeed, shippers have more rate pricing transparency than ever. There are public and private rate indexes, crowd-sourced contract rate benchmarking software, and forward contract vehicles, such as Maersk Spot and the New York Shipping Exchange (NYSHEX), that allow shippers to gauge rate levels. That transparency

eventually might drive a greater degree of comfort with the use of instant quoting tools, but that will take time and is more a cultural shift than a technological one.

Significant developments are also under way on the technological side, with procurement software guided by machine learning and artificial intelligence getting traction, albeit on a small base. These systems enable the use of procurement bots, programs that learn freight buying and selling patterns and make purely data-driven decisions about acceptable rate levels, how to split volume among container lines and NVOs, and even weekly allocations to each of those providers.

Instant ≠ Dynamic

There's another wrinkle to this issue that's worth exploring: the difference between instant quoting and dynamic pricing. While the two phrases are often used interchangeably, they actually describe two elements of a linked process. Instant quoting refers to the ability for a freight buyer to electronically receive a price for a service between two points on a given date. Dynamic pricing, which ideally underpins instant quoting, refers to a seller's ability accurately to vary the price it quotes at any given time depending on the quote request and other variables, such as available capacity or the time until a sailing departs.

It's often presumed that an entity able to provide an instant quote is effectively able to price dynamically. But in practice, instant quotes often are built on historical data foundations rather than on predictive models that account for a multitude of variables affecting the quoted rate. For instance, if a container line knew about a predicted spike in demand for a particular product in early March, an effective dynamic pricing algorithm would account for that in providing associated instant quotes for sailings three weeks prior to that spike. Both instant quoting and dynamic pricing remain a work in progress for the container shipping industry, but that progress does seem to finally have begun in earnest.

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 20 December 2019	Current Index 27 December 2019
Comprehensive Index			904.83	958.57
Service Routes				
Europe (Base port)	USD/TEU	20%	944	1027
Mediterranean (Base port)	USD/TEU	10%	1096	1172
USWC (Base port)	USD/FEU	20%	1342	1434
USEC (Base port)	USD/FEU	7.50%	2451	2562
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	1158	1172
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	774	929
East/West Africa (Lagos)	USD/TEU	2.50%	2335	2521
South Africa (Durban)	USD/TEU	2.50%	1012	1076
South America (Santos)	USD/TEU	5.00%	2000	2236
West Japan (Base port)	USD/TEU	5.00%	226	226
East Japan (Base port)	USD/TEU	5.00%	240	240
Southeast Asia (Singapore)	USD/TEU	7.50%	163	173
Korea (Pusan)	USD/TEU	2.50%	121	112

ตารางเปรียบเทียบอัตราค่าระวางระหว่าง Shanghai และประเทศไทย ไปเส้นทางต่างๆ

Route	Freight Rate (SCFI)			Freight Rate from Thailand		
	Freight Rate (29 Nov 2019)	Freight Rate (27 Dec 2019)	Change	Freight Rate from Thailand (30 Nov 2019)	Freight Rate from Thailand (31 Dec 2019)	Change
Europe	766	1027	261	700	800	100
US West Coast	1405	1434	29	1100	1080	-20
US East Coast	2684	2562	-122	2100	2200	100
Dubai	835	1172	337	500	500	0
Melbourne	816	929	113	325-575	325-575	0
West Japan	229	226	-3	300	300	0
East Japan	244	240	-4			
Busan	120	112	-8	50-80	50-80	0

จากตารางข้างต้น เป็นการเปรียบเทียบอัตราค่าระวาง ในช่วงปลายเดือนพฤศจิกายน และช่วงปลายเดือนธันวาคม โดยมีรายละเอียดดังนี้

1. อัตราค่าระวางจากประเทศจีน ไปเส้นทางต่างๆ โดยใช้ข้อมูลอ้างอิงจาก Shanghai Containerized Freight Index (SCFI)
2. อัตราค่าระวางจากประเทศไทย ไปเส้นทางต่างๆ โดยอ้างอิงจากการรวบรวมข้อมูลของสภาผู้สินค้าทางเรือแห่งประเทศไทย

เมื่อทำการเปรียบเทียบอัตราค่าระวางจากประเทศจีนไปยังเส้นทางต่างๆ พบว่าเส้นทางที่อัตราค่าระวางปรับเพิ่มขึ้น ได้แก่ เส้นทางยุโรป เส้นทางสหรัฐอเมริกาฝั่งตะวันตก เส้นทางดูไบ และเส้นทางออสเตรเลีย ส่วนเส้นทางที่อัตราค่าระวางปรับลดลง ได้แก่ เส้นทางสหรัฐอเมริกาฝั่งตะวันออก เส้นทางญี่ปุ่นทั้งฝั่งตะวันตก และตะวันออก และเส้นทางเกาหลี

สำหรับอัตราค่าระวางจากประเทศไทยไปยังเส้นทางต่างๆ เส้นทางที่อัตรายังคงที่ไม่มีการเปลี่ยนแปลง ได้แก่ เส้นทางดูไบ เส้นทางออสเตรเลีย เส้นทางญี่ปุ่น และเส้นทางเกาหลี ในขณะที่ค่าระวางที่ไปยังเส้นทางยุโรป และเส้นทางสหรัฐอเมริกาฝั่งตะวันออกปรับเพิ่มขึ้น ส่วนเส้นทางสหรัฐอเมริกาฝั่งตะวันตกค่าระวางปรับลดลง

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