การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 37 พ.ศ. 2562

สรุปค่าระวางเรือประจำสัปดาห์

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	SIZE USD/20'	SIZE USD/40'	Remark
Thailand - Shanghai	200	300	Effective till September 30, 2019
Thailand - Qingdao	300	450	
Thailand - Hong Kong	100	200	
Thailand - Klang	300	500	
Thailand - Jakarta	400	600	
Thailand - Hochiminh	250	350	
Thailand – Manila, North & South	300	450	
	Subject to CIC at destination		
Thailand - South Korea (Busan)	50-80	150	
Thailand - South Korea (Incheon)	150	300	
Thailand - Japan (Main Port)	300	400	
Thailand - Jebel Ali	500	750	
	War Risk Surcharge: $35/20' และ $70/40'		
Thailand - Melbourne	300-450	600-800	
Thailand – Durban / Cape Town	800	1500	
	Subject to SCMC USD 30/BL		
Thailand - Europe (Main Port)	750	1,400	Effective till September 30, 2019
Thailand - US West Coast	1,100	1,400	Effective till September 30, 2019
Thailand - US East Coast	1,900	2,400	

หมายเหตุ: SCMC คือ Security Compliance Management Charge

สถานการณ์ค่าระวางในช่วงเดือนกันยายน 2562 อัตราค่าระวางในเส้นทางเอเชียส่วนใหญ่คงที่ไม่มีการเปลี่ยนแปลง มีเพียงเส้นทางเกาหลีที่ค่าระวางปรับลดลงประมาณ 20-50% เป็นผลจากปัจจัยทั้งจากเรื่องค่าเงิน และปริมาณสินค้าที่ลดลงในเส้นทาง 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 ในขณะที่เส้นทาง Europe ค่าระวางปรับลดลง 200 USD/TEU และ 400 USD/FEU ทำให้อัตราค่าระวางอยู่ที่ 750 USD/TEU และ 1,400 USD/FEU และมีการเรียกเก็บค่า Low Sulphur Fuel Surcharge (LSS) ที่ต้นทางในอัตราเดิม คือ 20 USD/TEU และ 40 USD/FEU ส่วนเส้นทาง Australia อัตราค่าระวางอยู่ระหว่าง 300-450 USD/TEU และ 600-800 USD/FEU ทั้งนี้ อยู่ในช่วงพีคทำให้มีสินค้าในเส้นทางเป็นจำนวนมาก ต้องตรวจสอบ Space กับสายเรืออีกครั้ง

สำหรับเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนหลังของเดือนกันยายน ค่าระวางในฝั่ง West Coast อัตราค่าระวางปรับลดลง 300 USD ต่อตู้ ทำให้ค่าระวางอยู่ที่ 1,100 USD/TEU และ 1,400 USD/FEU ในขณะที่อัตราค่าระวางฝั่ง East Coast ปรับลดลง 300 USD/TEU และ 400 USD/FEU ทำให้ค่าระวางอยู่ที่ 1,900 USD/TEU และ 2,400 USD/FEU

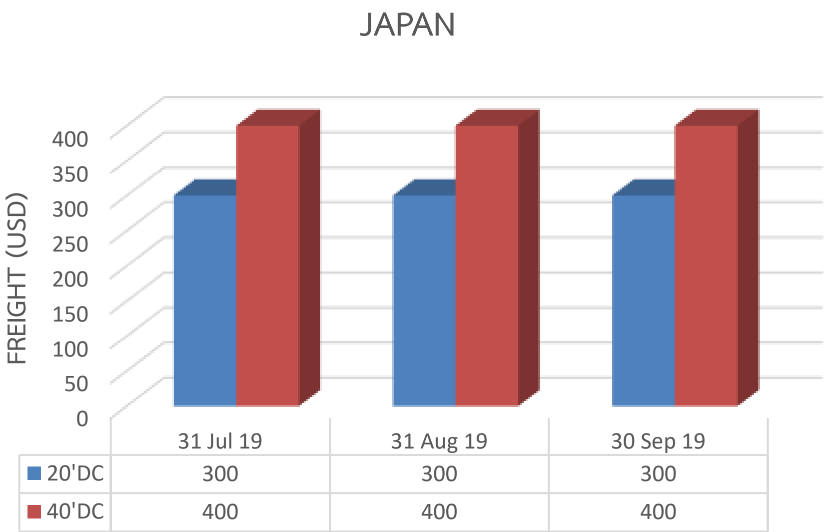
CONTAINER FREIGHT RATE (REEFER)

ROUTE	SIZE		Remark
	USD/20’	USD/40’	
Thailand-Hong Kong	800	900	Effective till September 30, 2019
Thailand-Shanghai	900	1,000	
Thailand-Japan (Tokyo, Yokohama)	900	1,200	
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
- สำหรับเส้นทางไปยุโรป ค่า OBS ปรับลดลง โดยเรียกเก็บในอัตรา 124 USD/TEU และ 248 USD/FEU

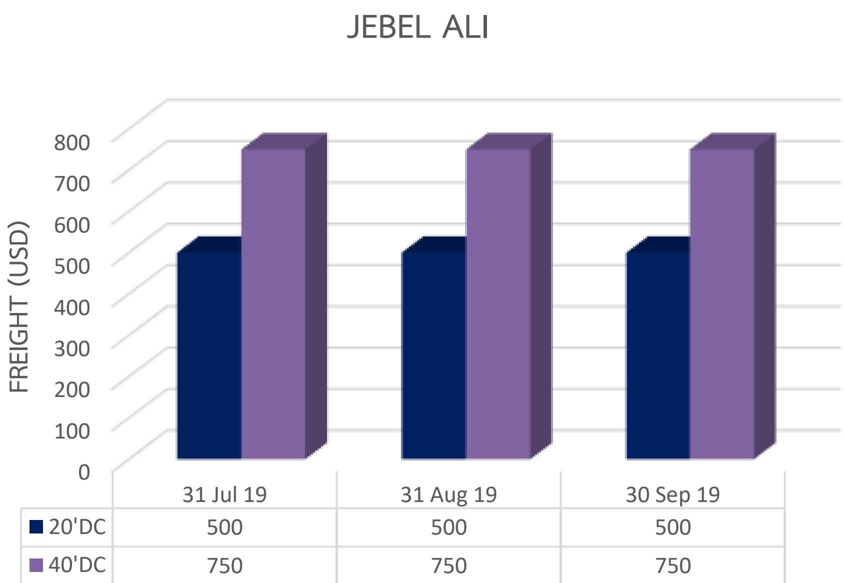
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต

ในเส้นทาง ไทย-ญี่ปุ่น เดือน ก.ค. ถึง ก.ย. ปี 2562

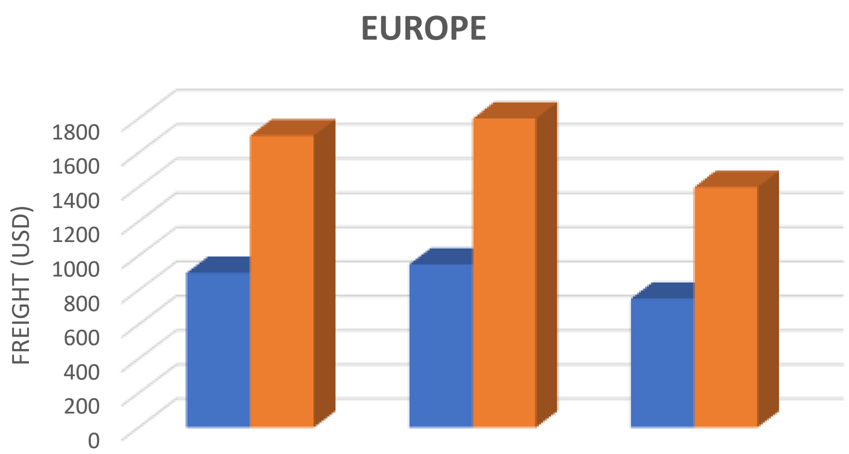


กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต

ในเส้นทาง ไทย-Jebel Ali เดือน ก.ค. ถึง ก.ย. ปี 2562

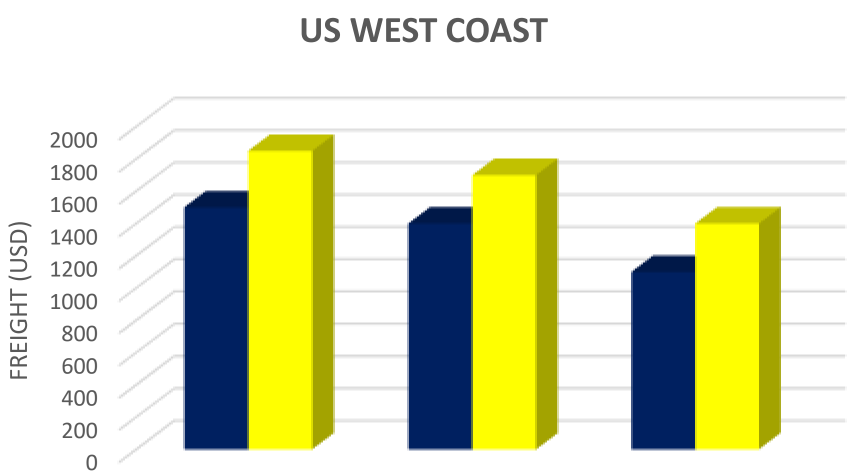


กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน ก.ค. ถึง ก.ย. ปี 2562



	31-Jul-19	31-Aug-19	30-Sep-19
20'DC	900	950	750
40'DC	1700	1800	1400

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

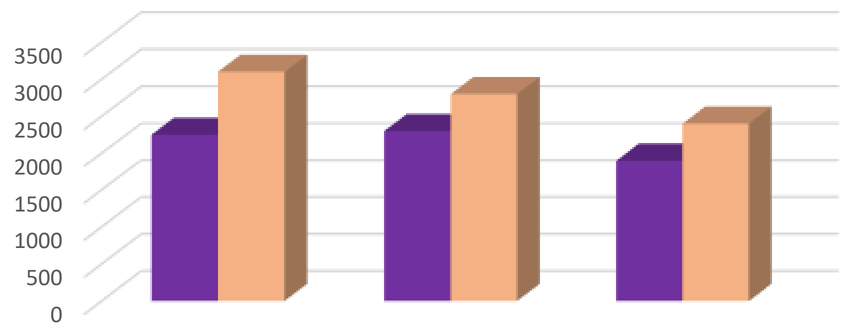


	31-Jul-19	31-Aug-19	30-Sep-19
20'DC	1500	1400	1100
40'DC	1850	1700	1400

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต

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

US EAST COAST



	31-Jul-19	31-Aug-19	30-Sep-19
20'DC	2250	2300	1900
40'DC	3100	2800	2400

รวบรวมประกาศเรียกเก็บค่าใช้จ่ายจากสายเรือ

สายเรือ Hapag Lloyd

- ประกาศเรียกเก็บค่า Dangerous Goods Supervision สำหรับสินค้าที่นำเข้า หรือส่งออกไปยังประเทศฮอนดูรัส โดยเรียกเก็บในอัตรา USD75/ตู้ มีผลตั้งแต่วันที่ 10 ตุลาคม 2562

สายเรือ Maersk

- ประกาศเรียกเก็บค่า Environmental Fuel Fee (EFF) สำหรับสินค้าทุกเส้นทาง สืบเนื่องจากมาตรการ IMO ที่กำหนดให้ใช้น้ำมันเชื้อเพลิงกำมะถันต่ำ โดยจะมีผลบังคับใช้ตั้งแต่วันที่ 1 ธันวาคม 2562 ซึ่งรายละเอียดค่าใช้จ่ายจะแจ้งให้ทราบช่วงปลายเดือนตุลาคม

Most ocean shippers accepting IMO 2020 bunker surcharge mechanisms

Maersk management indicates a ‘high acceptance’ by customers in 80%-90% of its contracts, accounting for around half of the Danish shipping giant’s volumes. Maersk management has indicated a “high acceptance” by customers of its bunker surcharge mechanisms in 80%-90% of its contracts, accounting for around half of the Danish shipping giant’s volumes, as it prepares shippers for a significant rise in fuel costs due to new global low-sulphur fuel rules that come into force next year.

In discussions with analysts, Maersk’s senior management team also suggested that slow-steaming was more likely than accelerated scrapping to improve fuel efficiency, reports David Kerstens, equity analyst at logistics investment consultancy Jefferies. Maersk has previously estimated a $2bn rise in its annual fuel costs due to the IMO 2020 low-sulphur fuel cap of 0.5% which enters force in January. At the beginning of 2019, Maersk introduced a new bunker adjustment factor surcharge to help defray the associated costs of meeting the low-sulphur fuel cap, with the total industry-wide bill for preparations put at $15bn. At the meeting with analysts, Maersk’s chief executive and chief financial officer indicated that they are encouraged by recent container market discipline and talk about potential bunker surcharges in the spot market. In a feedback report from the meeting, Kerstens said: "[Maersk] management is encouraged by high acceptance of bunker surcharges in contracts and recent market discipline and talk about mitigating higher fuel costs under IMO 2020 in the spot market.

"Slow-steaming is seen as more likely than accelerated scrapping to improve fuel efficiency. Ongoing unit cost reductions of 1%-2% are targeted, while there is limited room for M&A and cash returns for now." Kerstens added: "We estimated earlier bunker costs could increase by 15%-20% under IMO 2020, leading to working capital increases from 4Q19E, based on today's prices for high- and low-sulphur fuel oil. However, these prices are set to change, as demand for high-sulphur fuel oil is expected to fall by 65%, while demand for low-sulphur fuel oil could increase fivefold. "Scrubbers cover c30% of fuel consumption, while management expressed limited interest in LNG; instead it would be looking at alternatives to further reduce carbon footprint longer-term."

The high acceptance level among customers for the adjusted surcharge comes after a rough reception from one customer lobby group when Maersk made the announcement in September last year. The Global Shippers Forum reacted with "suspicion" at the time, arguing that the surcharge "lacks transparency; no data is available to let customers work out how the charge has been calculated".

Meanwhile, Maersk has invested to reduce the impact of higher fuel bills by signing an agreement to produce IMO 2020-compliant bunker fuel. The venture between Maersk Oil Trading and Koole Terminals in Rotterdam will see an annual production expected to cover between 5%-10% of Maersk's annual fuel demand.

Source: https://www.lloydsloadinglist.com

US box imports surge again ahead of tariffs

Container traffic rebounded in July and August ahead of 1 September duty hike, with a further spike expected in November driven by the scheduled December rise in duties on Chinese products. Imports at major US container ports reached unusually high numbers just before new tariffs on goods from China took effect on 1 September and are expected to surge again before another round of tariffs takes effect in December, according to the monthly Global Port Tracker report released yesterday by the National Retail Federation (NRF) and Hackett Associates. "Retailers are still trying to minimize the impact of the trade war on consumers by bringing in as much merchandise as they can before each new round of tariffs takes effect and drives up prices," observed NRF vice president for supply chain and customs policy Jonathan Gold. "That's the same pattern we've seen over the past year, but we're very quickly going to be at the point where virtually all consumer goods will be subject to these taxes.

"The upcoming October talks with China are an opportunity to put a stop to this escalation, repeal the tariffs that have been imposed, and focus on growing the economy." New 15% tariffs on a wide range of consumer goods from China took effect at the beginning of this month and are scheduled to be expanded to additional goods on 15 December – covering a total of about $300 billion in imports, the NRF highlighted. In addition, 25% tariffs on $250 billion worth of imports already imposed over the past year will increase to 30 percent on 1 October. Hackett Associates founder Ben Hackett commented: “The tariff war with China closely resembles a poker game, with each country continually upping the ante. As each side eyes its hand, things can only get worse.” US ports covered by Global Port Tracker handled 1.96 million TEU in July, the latest month for which after-the-fact numbers are available. That was up 9.1% from June and up 2.9%, year-over-year. The numbers were high again in August, Hackett observed, with estimated throughput of 1.93 million TEU, up 1.8% year-over-year. September is forecast at 1.85 million, down 0.7% from last year; October at 1.92 million TEU, down 5.5%; November at 1.97 million TEU, up 8.8%, and December at 1.77 million TEU, down 9.8%. Likely driven by the new tariffs scheduled for December, November’s 1.97 million TEU would be the highest monthly total since the record 2 million TEU seen in October 2018. The first half of 2019 totalled 10.5 million TEU, up 2.1% over the first half of 2018, and 2019 is expected to see a new record of 21.9 million TEU. That would be up 0.7% from last year’s previous record of 21.8 million TEU, which rose 6.2% over 2017.

January 2020 is forecast at 1.81 million TEU, down 4.5% from January 2019. Global Port Tracker, which is produced for NRF by the consulting firm Hackett Associates, covers the US ports of Los Angeles/Long Beach, Oakland, Seattle and Tacoma on the West Coast; New York/New Jersey, Port of Virginia, Charleston, Savannah, Port Everglades, Miami and Jacksonville on the East Coast, and Houston on the Gulf Coast. As reported yesterday, although European exporters also enjoyed some positive effects from the US-China trade tussle in the early months of 2019, these benefits are predicted to be short-lived if the tensions ease and as the effects of the US-China trade war further impact the global economy, with key EU economies already flatlining or contracting – or if EU countries themselves are targeted more aggressively by the Trump administration.

Analysis in the latest Global Port Tracker by Hackett Associates indicate that Northern Europe’s top six box ports handled just over 3.8m teu in June, a 4.2% increase over the same month in 2018 but a 3% fall in volumes compared with the prior month of May this year. The report, covering container throughputs at Hamburg, Bremen/Bremerhaven, Rotterdam, Antwerp, Zeebrugge and Le Havre, said that total imports to Europe decreased by 2.7% in June, with a 0.1% dip in North Europe (up 2.1% year-on-year) and a 6.7% slide in the Mediterranean and Black Sea region (up 1.5% year-on-year). However, overall container traffic growth for the leading half dozen ports in northern Europe reached 5.3% in the second quarter of 2019 compared with like period 2018, which the report stated is the highest year-on-year growth since late 2017 and “much higher” than in the major ports in China (4.0%) and the US (2.2%). US ports experienced strong growth in late 2018, but in the second quarter of 2019 growth dropped to the lowest rate during the presidency of Donald Trump.

With the main EU economies currently flatlining or already contracting, Hackett projected that the second half of 2019 will see North European imports “barely hold on to positive growth” and that the first half of 2020 will be “negative”. He commented: “The tit for tat tariffs between the US and China and the threat of sanctions of friend and foe alike have led the global economy to a downturn domestically and reduced global trade. We have been warning that the economic climate has not been favourable for some time. “Germany and the UK have had negative growth in the most recent quarter, Italy is de facto in recession, France is slowing down, China is facing slowing growth and declining exports not only with the US but with Europe and Southeast Asia as well. Singapore is facing negative growth. These signs can no longer be put aside and ignored.

He noted that in China, industrial production growth was “at the lowest rate since 2002, as the rounds of tariff increases are biting both protagonists”, adding: “In the event of a recession, there are precious few tools available. Interest rates are already rock bottom and investment is sluggish. Keep an eye on the dollar, its strength is not due to the US economy, rather it is the currency safe haven. “We see the repercussions of this in declining growth rates in the container shipping markets. Peak seasons are not appearing, freight rates are declining despite a lot of capacity having been withdrawn for cleaner operations in anticipation of the 2020 ship pollution regulations.”

Source: https://www.lloydsloadinglist.com

Spot rates in freefall, carriers now mull blanking voyages without notice

Container spot rates on the key Asia-to-Europe and transpacific tradelanes are in freefall, prompting carriers to consider cancelling voyages without notice. The Shanghai Containerized Freight Index (SCFI), published yesterday due to a holiday in China today, recorded further rate declines for Europe and the US, as market fundamentals continued to weaken. Asia-North Europe spot rates fell another 5.1%, to $674 per teu, which is a massive one-third below their level at the beginning of January and over 20% lower than in the same week last year. And for Mediterranean ports, where carriers have had some success introducing FAK increases, the index recorded a 5.8% drop, to $826 per teu.

One Asia-North Europe carrier source told *The Loadstar,* on the side lines of London International Shipping Week this week, that there were “plans afoot” for immediate capacity reductions.
“Some shippers have been complaining that they are only getting four weeks’ notice of blankings, but it is possible that we will have to consider pulling a voyage without any notice if things don’t improve very quickly,” he said. Much will depend, however, on how the market adjusts to the 2M’s AE2/Swan service suspension at the end of this month, the Ocean Alliance’s five headhaul blankings, THE Alliance’s three void sailings and an additional cancelled AE7/Condor loop by the 2M in week 40. Meanwhile, a similar pattern emerged this week on the transpacific, where the supply-demand fundamentals have been thrown out of kilter by tariff uncertainties.

The US components of the SCFI softened further this week, losing 7.6% for US west coast ports, to $1,447 per 40ft, and shedding 4.4% for east coast ports, to $2,516 per 40ft. The rates are, respectively, some 38% and 28% below the level of 12 months ago for the west and east coast ports when tariff-hedging front-loading by shippers spiked the market. In a bid to mitigate this softening demand, transpacific carriers have so far announced the withdrawal of nine weekly sailings from Asia to the US west coast next month, along with four US east coast loops and two sailings to the Gulf coast. Moreover, in a customer advisory today, OOCL said that “in response to the low seasonal demand” it was blanking an additional two voyages in weeks 40 and 41.

Amid their battles to shore up freight rates, lines are beginning to roll out their IMO 2020 fuel surcharges to recover the extra costs involved in complying with the new regulations. Ships that will need to consume low-sulphur fuel to comply with their 1 January start will have to start replenishing their tanks with the 0.5% maximum sulphur content fuel in the final quarter of the year.

Indeed, Maersk this week advised it would be introducing an EFF (environmental fuel fee) on all trades from December 1, applicable to all spot and short-term contracts of less than three months. The carrier did not reveal the amount of the EFF. It said it would confirm this at the end of next month, but advised that the surcharges would be calculated as the price difference between high- and low-sulphur fuel "multiplied by a trade factor".

Source: https://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 6 September 2019	Current Index 12 September 2019
Comprehensive Index			795.05	765.79
Service Routes				
Europe (Base port)	USD/TEU	20%	710	674
Mediterranean (Base port)	USD/TEU	10%	877	826
USWC (Base port)	USD/FEU	20%	1566	1447
USEC (Base port)	USD/FEU	7.50%	2631	2516
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	633	602
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	790	820
East/West Africa (Lagos)	USD/TEU	2.50%	2318	2352
South Africa (Durban)	USD/TEU	2.50%	771	789
South America (Santos)	USD/TEU	5.00%	1866	1977
West Japan (Base port)	USD/TEU	5.00%	232	232
East Japan (Base port)	USD/TEU	5.00%	234	234
Southeast Asia (Singapore)	USD/TEU	7.50%	101	101
Korea (Pusan)	USD/TEU	2.50%	117	117

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