การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 20 พ.ศ. 2562

สรุปค่าระวางเรือประจำสัปดาห์

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	SIZE		Remark
	USD/20'	USD/40'	
Thailand - Shanghai	200	300	Effective till May 31, 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)	100	200	
Thailand - South Korea (Incheon)	200	400	
Thailand - Japan (Main Port)	300	400	
Thailand - Jebel Ali	550	700	
Thailand - Melbourne	400	800	Effective till May 31, 2019
Thailand - Europe (Main Port)	900	1,700	Effective till May 31, 2019
Thailand - US West Coast	1,400	1,750	Effective till May 31, 2019
Thailand - US East Coast	2,350	3,200	

สถานการณ์ค่าระวางในช่วงเดือนพฤษภาคม 2562 อัตราค่าระวางในหลายเส้นทางคงที่ไม่มีการเปลี่ยนแปลง โดยเส้นทาง 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 เส้นทาง Japan ค่าระวางอยู่ที่ 300 USD/TEU และ 400 USD/FEU เส้นทาง Jebel Ali ค่าระวางอยู่ที่ 550 USD/TEU และ 700 USD/FEU ส่วนเส้นทางอื่นที่อัตราค่าระวางยังคงที่เช่นเดียวกัน คือ เส้นทาง Europe อัตราค่าระวางอยู่ที่ 900 USD/TEU และ 1,700 USD/FEU และมีการเรียกเก็บค่า Low Sulphur Fuel Surcharge (LSS) ที่ต้นทางในอัตราเดิม คือ 20 USD/TEU และ 40 USD/FEU และเส้นทาง Australia อัตราค่าระวางคงที่อยู่ที่ 400 USD/TEU และ 800 USD/FEU

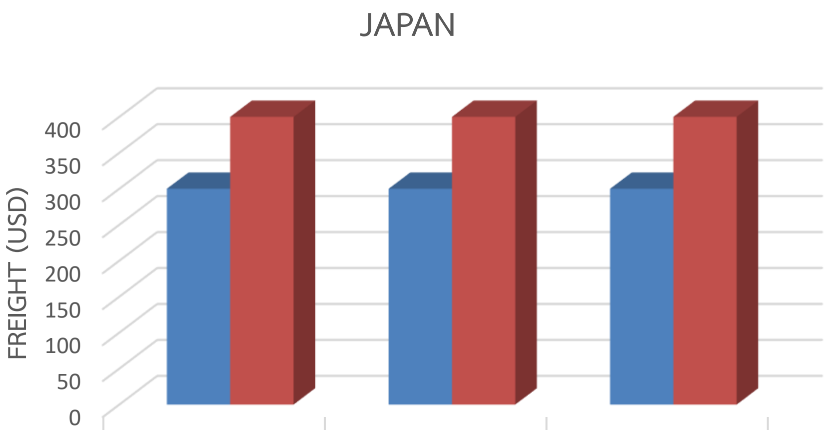
สำหรับเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนหลังของเดือนพฤษภาคม อัตราค่าระวางปรับลดลง USD 100/TEU และ USD 150/FEU ทำให้อัตราค่าระวางในฝั่ง West Coast อยู่ที่ 1,400 USD/TEU และ 1,750 USD/FEU และอัตราค่าระวางฝั่ง East Coast อยู่ที่ 2,350 USD/TEU และ 3,200 USD/FEU

CONTAINER FREIGHT RATE (REEFER)

ROUTE	SIZE		Remark
	USD/20’	USD/40’	
Thailand-Hong Kong	800	สินค้าทั่วไป 1,000 สินค้าทุเรียน 1,500-1,800	Effective till May 31, 2019
Thailand-Shanghai	900	1,100	Effective till May 31, 2019
Thailand-Japan (Tokyo, Yokohama)	900	1,200	Effective till May 31, 2019
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,400	1800	

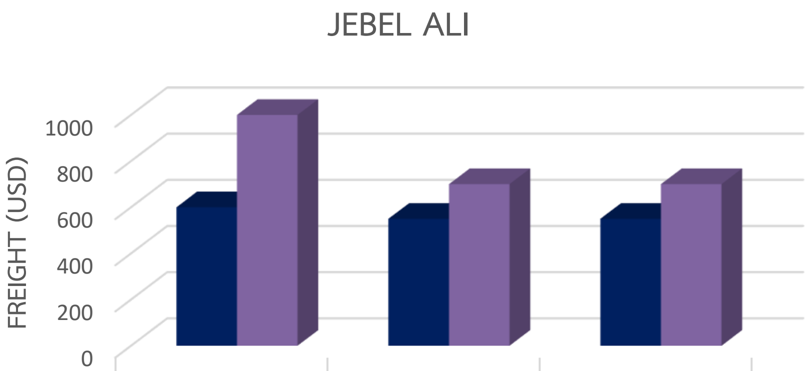
- สำหรับเส้นทางไปประเทศจีน และฮ่องกง มีการเรียกเก็บค่า Low Sulphur Surcharge (LSS) ที่ปลายทางในอัตรา 20 USD/TEU และ 40 USD/FEU
- ประกาศยกเลิกการเรียกเก็บค่า Bunker Surcharge (OBS) ในเส้นทางเอเชีย ในขณะที่เส้นทางไปยุโรปมีการปรับเพิ่มค่า OBS โดยเรียกเก็บในอัตรา 94 USD/TEU และ 188 USD/FEU
- สถานการณ์การส่งออกสินค้าประเภททุเรียนด้วยตู้ขนาด 40’HQ Reefer ปรับตัวดีขึ้น ค่าระวางเริ่มปรับลดลงส่วนตู้ Reefer สำหรับสินค้าทั่วไปเส้นทาง Hong Kong อัตราค่าระวางปรับลดลงเช่นเดียวกัน โดยปรับลดลงมาอยู่ในอัตราเดิม

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



	31 Mar 19	30 Apr 19	31 May 19
20'DC	300	300	300
40'DC	400	400	400

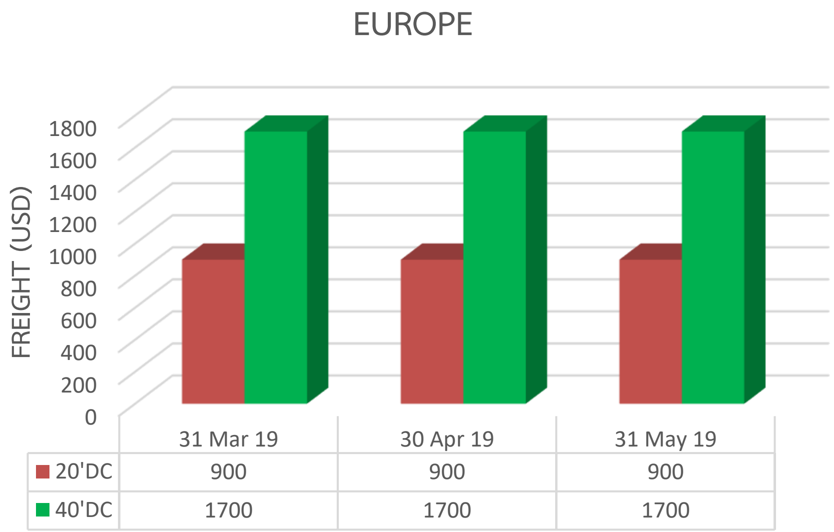
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-Jebel Ali เดือน มี.ค. ถึง พ.ค. ปี 2562



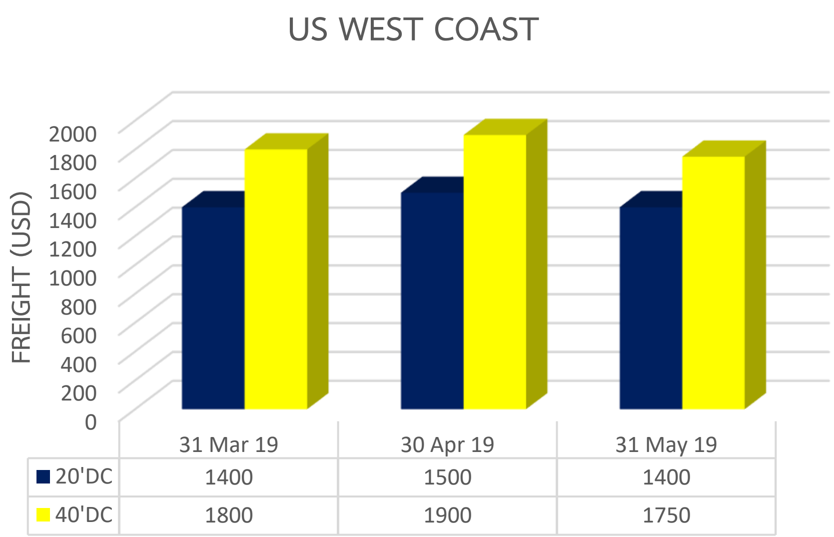
	31 Mar 19	30 Apr 19	31 May 19
20'DC	600	550	550
40'DC	1000	700	700

20'DC 40'DC

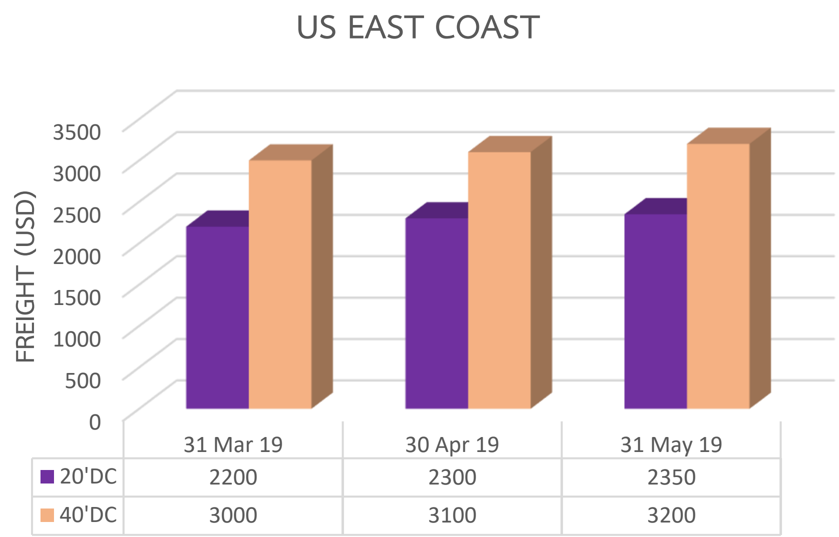
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน มี.ค. ถึง พ.ค. ปี 2562



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



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



รวบรวมประกาศจากสายเรือเรื่องการปรับการเรียกเก็บค่าใช้จ่าย

สายเรือ CMA CGM

- ประกาศเรียกเก็บค่า Rate Restoration Charge สำหรับสินค้าที่ส่งออกไปยังเส้นทางต่างๆ โดยมีผลตั้งแต่วันที่ 1 มิถุนายน 2562 ดังนี้

Routing	Rate Restoration Charge
South Africa	USD400/TEU
West Africa	USD500/Container

- ประกาศปรับการเรียกเก็บค่า Emergency Bunker Recovery เนื่องจากน้ำมันมีการปรับราคาเพิ่มขึ้น โดยมีผลตั้งแต่วันที่ 10 มิถุนายน 2562 ดังนี้
  - Dry Container: USD 55/TEU and/or EUR 45/TEU
  - Reefer Container: USD 85/TEU and/or EUR70/TEU

สายเรือ MSC

- ประกาศปรับการเรียกเก็บค่า B/L และค่า D/O โดยเริ่มมีผลตั้งแต่วันที่ 1 มิถุนายน 2562 ดังนี้

LEG	CHARGES	Current	New	Remark
Export	B/L Fee (Manual)	THB 1,200 per B/L	THB 1,700 per B/L	Except USA/CA trade effective from gate-in date June 1,2019
Import	D/O Fee	THB 1,200 per D/O	THB 1,700 per D/O	

สำหรับการส่ง Booking และ Shipping Instruction ผ่านระบบอิเล็กทรอนิกส์ ค่า B/L ยังคงอัตราเดิมที่ 1,000 บาท/set

Five more lines join Digital Container Shipping Association

Momentum for standardization builds as CMA CGM, Evergreen, HMM, Yang Ming, and ZIM join initial members A.P. Moller-Maersk, Hapag-Lloyd, MSC and ONE, representing 70% of the market. Momentum is building for digitalization and standardization within the container shipping industry, with five more major box lines announcing their intention to join the Digital Container Shipping Association (DCSA).

CMA CGM confirmed its status as a “founding member” of DCSA, hence gaining a seat on the Supervisory Board of the non-profit association, which was established April 2019 in Amsterdam, The Netherlands. Evergreen Line, Hyundai Merchant Marine, Yang Ming Marine Transport Corporation and ZIM Integrated Shipping Services announced that they are to join DCSA as members, pending regulatory approval. The five carriers join the association’s initial members A.P. Moller-Maersk, Hapag-Lloyd, MSC and ONE.

Once regulatory approval has been gained, the members will represent 70% of the market, DCSA said, adding: “With nine of the largest container shipping lines in the world, both from Asia and EMEA, the Digital Container Shipping Association represents a substantial part of the industry.” The association, which says its purpose is “to pave the way for digitalization and standardization in the container shipping industry”, stressed that all ocean carriers are invited to join, “and close collaboration with the entire industry is expected”.

Thomas Bagge, CEO of DCSA, commented: “We are thrilled to have additional members joining the DCSA on our journey to drive standardization and interoperability in the industry, with CMA CGM joining as a founding member. It is critical for our success that the standards developed will be implemented, and the commitment and engagement of many container shipping lines is therefore crucial.”

Rajesh Krishnamurthy, Executive Vice President IT & Transformations at CMA CGM, commented: “CMA CGM is always looking for best practices and standards to support the innovation and digital strategy of the company. Being a founding member will enable us to work together on setting the standards for digitization of the entire industry.”

Kay Fang, Executive Vice President of International Customer Service of Evergreen Line, said: “In keeping up with industry trend toward digitalization, Evergreen has been pursuing to offer customers ever-productive and ever-efficient service. In a more and more connected shipping supply chain, we are convinced that standardization is the prerequisite for all associated stakeholders to realizing effective digitalization and interoperability, which are urgently needed not only by us but the whole industry to help carry out the joint pursuit.”

Kyungin Jung, Senior Vice President, CIO of Hyundai Merchant Marine, said: “Digitization is not only right but also the only path to follow for all of the stakeholders in the shipping industry. Hyundai Merchant Marine will cooperate with colleague liners very closely to find out the best route for greeting the upcoming digital era. We strongly believe in that the collective intelligence makes the better outcomes.”

Steven Tsao, CIO of Yang Ming Marine Transport Corporation, commented: “As we can see, digitalization driven by innovation and technology is one of the main future trends in the shipping industry, with many major parties involved in the process. We are glad to become a member of DCSA, as it is important for us to develop the relevant standards, processes and data flow for digital transformations. We believe this will significantly improve the efficiency of the transportation process and increase customer satisfaction.”

Eyal Ben-Amram, Executive Vice President, CIO of ZIM Integrated Shipping Services, said: “We are excited to join DCSA and to contribute to the digital transformation. We firmly believe that digital innovation will shape the future of the shipping industry, and our multiservice approach embodies this belief. Standardization is the right way to improve the eco-system of all stakeholders.”

DCSA also announced that Henning Schleyerbach will become COO as of 1 July. Schleyerbach comes from a position as Senior Director Customer Relationship Management at Hapag-Lloyd, "and will together with CEO Thomas Bagge form the leadership team of DCSA, working on the development of standards for the industry".

André Simha, chairman of the Supervisory Board, said: "We are pleased to announce, that in Henning Schleyerbach we have won another strong industry profile, who as COO will drive DCSA´s operational activities. With Henning Schleyerbach and Thomas Bagge, DCSA has a strong leadership team in place which is supported by all founding members and represents container shipping at its best across all aspects."

Source: https://www.lloydsloadinglist.com

Shippers brace for further US-China tariffs

Import representatives warn it is impossible for companies to switch sourcing to other countries in the short term, predicting further front-loading of inventories, as experienced ahead of tariff rises last year. US importers and their logistics providers are preparing for further US-China tariffs and a possible fresh rush to front-load deliveries to beat the next tariff deadline, after the US confirmed its intention to impose 25% duties on further US$300 billion of products imported annually from China.

The Office of the United States Trade Representative (USTR) has called for comments by 17 June on its new list of products. It said: "The proposed modification is to take further action in the form of an additional *ad valorem* duty of up to 25% on products of China with an annual trade value of approximately $300 billion." Representatives of US importers warned that it was impossible for companies to switch their sourcing of products from China to other countries in the short term, with sourcing decisions taking time to make and with other countries lacking the necessary manufacturing and logistics capacity that China has.

Matthew Shay, president and CEO of the National Retail Federation (NRF), said retailers were considering a "longer-term play about diversifying the supply chain and maybe moving some of the supply capacity in other places". But he added: "The issue is there's no new China. "You can't just go somewhere else and replace China with Vietnam or Cambodia or Thailand or South or Central America. You're talking about replacing the capacity of a firehose with the capacity of a garden hose."

The NRF believes the threat of higher tariffs on a further $300 billion of products imported annually from China will lead to further front-loading, as experienced ahead of tariff rises several times last year. It highlighted that the rush to bring merchandise into the country that was seen through much of last year slowed down after Trump postponed a tariff hike from January to March and then put it on hold indefinitely as trade talks with China showed signs of progress.

"With retail sales rising and President Trump saying he plans to both increase and broaden tariffs on goods from China, imports at the nation's major retail container ports are expected to see unusually high levels the remainder of this spring and through the summer," according to the latest monthly Global Port Tracker report by the National Retail Federation and Hackett Associates. NRF vice president for supply chain and customs policy Jonathan Gold said: "Much of this is driven by consumer demand, but retailers are likely to resume stocking up merchandise before new tariffs can take effect."

Digital ocean freight rates specialist Freightos also predicted that the looming tariff increase may drive a spike in transpacific ocean freight prices. "Last week's tweet from President Trump left little time for ocean freight to beat the deadline, sending air cargo searches from forwarders up by 35%," said Eytan Buchman, chief marketing officer at Freightos."Ocean rates from China to the West Coast tumbled 12% this month alone and are closer to last year's rates than they have been in over ten months. But this could all change if the looming

25% tariff increase on the rest of Chinese imports are imposed. “In the past, tariffs implemented with enough notice have prompted ocean freight rushes and could precipitate a summer price spike.” The National Retail Federation issued the following statement from President and CEO Matthew Shay

After the Trump administration released a list of $300 billion of Chinese goods that will be targeted by additional tariffs of 25%, the NRF’s Shay commented: “We support the administration’s efforts to deliver a meaningful trade agreement that levels the playing field for American businesses and workers. But the latest tariff escalation is far too great a gamble for the US economy. “Slapping tariffs on everything US companies import from China – goods that support US manufacturing and provide consumers with affordable products – will jeopardize American jobs and increase costs for consumers. “Taxing Americans on everyday products like clothes and shoes is not the answer for holding China accountable. Working with our allies who share the same concerns and immediately rejoining TPP are more effective ways to put pressure on China without hurting hardworking Americans.

“We urge the US and China to get these critical negotiations back on track. Both sides will lose in a full-blown trade war, and the global economy will suffer.”

A study commissioned by Tariffs Hurt the Heartland and prepared by Trade Partnership estimated that imposing tariffs of 25% on all remaining imports from China, combined with the impact of retaliation, would jeopardize more than 2 million American jobs, cost the average US family $2,300 each year, and reduce the value of US GDP by 1%.

Source: https://www.lloydsloadinglist.com

Lower air and ocean freight growth likely to continue in 2019

Lack of clarity on costs associated with container shipping’s IMO 2020 fuel changes is adding to planning challenges this year for shippers, says Bolloré Logistics. Air and ocean freight markets in 2019 are likely to continue in a similar vein to that of the first quarter, which produced a lower rate of growth compared to recent periods, as macro-economic uncertainty and ongoing international trade tensions create a lack of visibility for shippers. Most observers had anticipated a slowdown in the first quarter (Q1) as a major global re-stocking cycle ended and exporters completed deliveries ahead of threatened trade sanctions between the US and China. However, slumps in Asia reduced growth more than expected, the report noted.

Bolloré Logistics’ air freight procurement director, Claude Picciotto, explained that volumes out of China were down even before Chinese New Year, including flows to destinations in Asia that were expected to serve as relay positions for goods bound for the US. “China tapering off was not a complete surprise. But China remaining flat after March, even as volumes on all other routes slumped, wasn’t expected,” he said. Carriers have cut capacity across the board to maintain price and yield levels, despite major fluctuation in flows according to the various routes, Picciotto added. “While China may be down 15% and Asia-Europe off 13%, Europe-Asia is up 4% and Europe-North America is still healthy,” he added. “But everyone has reduced capacity, and long-term planning is still important to assure exporters have space when they need it.”

Ocean carriers are also pulling capacity amid weakening demand, commented Bolloré Logistics’ procurement director for sea freight, Anne-Sophie Fribourg. But in addition to this move being a means to prop up rates, it had also been taken with looming International Maritime Organization (IMO) rules to reduce sulphur emissions in mind, she highlighted. The IMO 2020 regulations, which will take effect in January, are expected to cost ocean carriers an estimated $15 billion, which has understandably triggered hesitation on the part of shippers in finalising their future transport plans who are seeking a clear idea of what the likely financial impact will be for them. “Exporters are already unsatisfied with the procedures and transparency of surcharges and fees added above contracted rates so they want to know how much of this price tag will be passed on to them," Fribourg said.

She pointed to a recent European Shippers' Council survey in which a sample of almost 300 client and freight forwarding companies were invited to evaluate service quality. It revealed that the harshest judgment was reserved for price clarity and the application of surcharges. Consequently, the study urged carriers to use the imposed changes and costs of IMO 2020 as a catalyst to create revamped, transparent rate scales.

"This is an enormous expense to factor in and dealing with it is going to have very important consequences for the entire sector," Fribourg underlined. "Exporters can't effectively plan if they don't know what costs they'll be facing. This is especially true in situations of flux and change," she added.

Source: https://www.lloydsloadinglist.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 10 May 2019	Current Index 17 May 2019
Comprehensive Index			756.88	726.23
Service Routes				
Europe (Base port)	USD/TEU	20%	768	723
Mediterranean (Base port)	USD/TEU	10%	726	696
USWC (Base port)	USD/FEU	20%	1442	1340
USEC (Base port)	USD/FEU	7.50%	2711	2597
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	620	611
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	288	275
East/West Africa (Lagos)	USD/TEU	2.50%	2601	2616
South Africa (Durban)	USD/TEU	2.50%	626	620
South America (Santos)	USD/TEU	5.00%	940	887
West Japan (Base port)	USD/TEU	5.00%	233	233
East Japan (Base port)	USD/TEU	5.00%	237	237
Southeast Asia (Singapore)	USD/TEU	7.50%	141	140
Korea (Pusan)	USD/TEU	2.50%	120	118

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