การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 14 พ.ศ. 2562

สรุปค่าระวางเรือประจำสัปดาห์

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	SIZE USD/20’	SIZE USD/40’	Remark
Thailand - Shanghai	200	300	Effective till April 30, 2019
Thailand - Qingdao	300	450	
Thailand - Hong Kong	100	200	
Thailand - Kelang	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 April 30, 2019
Thailand - Europe (Main Port)	900	1,700	Effective till April 30, 2019
Thailand - US West Coast	1,500	1,900	Effective from April 14, 2019
Thailand - US East Coast	2,300	3,100	

สถานการณ์ค่าระวางในช่วงเดือนเมษายน 2562 อัตราค่าระวางในเส้นทางเอเชียที่บางเส้นทางปรับเพิ่มสูงขึ้นในเดือนมีนาคมได้ปรับลดลง โดยเส้นทาง Shanghai ปรับลดลง 50 USD/TEU และ 150 USD/FEU ทำให้อัตราค่าระวางอยู่ที่ 200 USD/TEU และ 300 USD/FEU และเส้นทาง Jebel Ali ปรับลดลง 50 USD/TEU และ 300 USD/FEU ทำให้อัตราค่าระวางอยู่ที่ 550 USD/TEU และ 700 USD/FEU ในขณะที่อัตราค่าระวางในเส้นทางเอเชียเส้นทางอื่น ส่วนใหญ่ค่าระวางยังคงที่ไม่เปลี่ยนแปลง โดยเส้นทาง Hong Kong ค่าระวางคงที่อยู่ที่ 100 USD/TEU และ 200 USD/FEU, เส้นทาง Kelang ค่าระวางอยู่ที่ 300 USD/TEU และ 500 USD/FEU และเส้นทาง Japan ค่าระวางอยู่ที่ 300 USD/TEU และ 400 USD/FEU

สำหรับเส้นทางที่อัตราค่าระวางปรับเพิ่มขึ้น ได้แก่ เส้นทางสหรัฐอเมริกา โดยค่าระวางช่วงครึ่งแรกของเดือนเมษายนปรับเพิ่มขึ้น 100 USD ต่อตู้ ทำให้อัตราค่าระวางในฝั่ง West Coast อยู่ที่ 1,500 USD/TEU และ 1,900 USD/FEU และอัตราค่าระวางทางฝั่ง East Coast อยู่ที่ 2,300 USD/TEU และ 3,100 USD/FEU เนื่องจากเป็นช่วงใกล้สิ้นสุด Service Contract ทำให้มีการเร่งส่งออกเพื่อให้เป็นไปตามเป้าหมาย ประกอบกับเป็นช่วงก่อนเทศกาลสงกรานต์ ทำให้มีความต้องการตู้สูงขึ้น

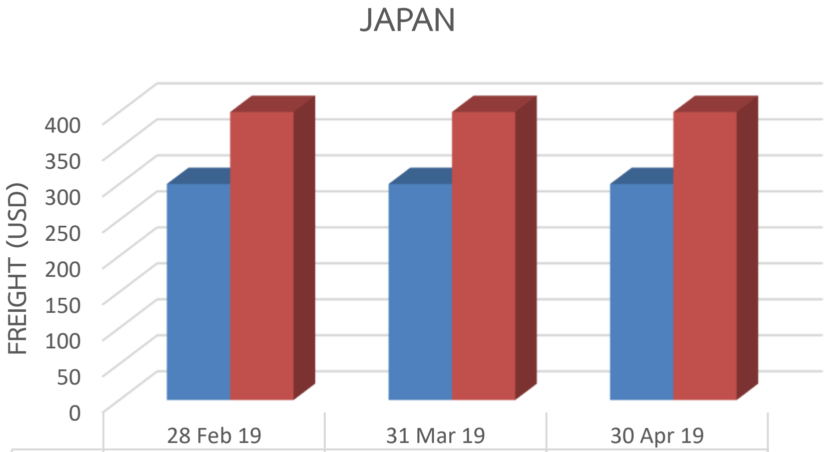
ส่วนเส้นทางอื่นที่อัตราค่าระวางยังคงที่ไม่เปลี่ยนแปลง คือ เส้นทาง Europe อัตราค่าระวางคงตัวอยู่ที่ 900 USD/TEU และ 1,700 USD/FEU และมีการเรียกเก็บค่า Low Sulphur Fuel Surcharge (LSS) ที่ต้นทางในอัตราเดิม คือ 20 USD/TEU และ 40 USD/FEU และเส้นทาง Australia อัตราค่าระวางคงที่อยู่ที่ 400 USD/TEU และ 800 USD/FEU

CONTAINER FREIGHT RATE (REEFER)

ROUTE	SIZE		Remark
	USD/20’	USD/40’	
Thailand-Hong Kong	800	1,100-1,500	Effective till April 30, 2019
Thailand-Shanghai	900	1,100	
Thailand-Japan (Tokyo, Yokohama)	900	1,200	Effective till April 30, 2019
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,400	1800	

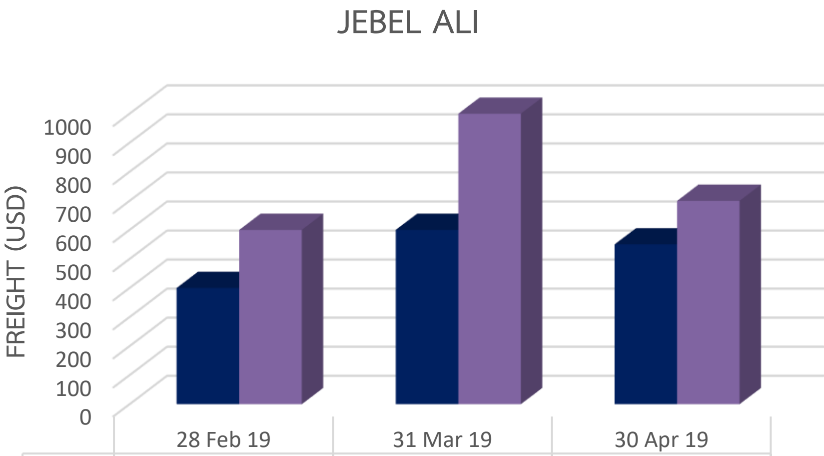
- สำหรับเส้นทางไปประเทศจีน และฮ่องกง มีการเรียกเก็บค่า Low Sulphur Surcharge (LSS) ที่ปลายทางในอัตรา 20 USD/TEU และ 40 USD/FEU
- ประกาศยกเลิกการเรียกเก็บค่า Bunker Surcharge (OBS) ในเส้นทางเอเชีย ในขณะที่เส้นทางไปยุโรปมีการปรับลดค่า OBS โดยเรียกเก็บในอัตรา 79 USD/TEU และ 158 USD/FEU
- เนื่องจากช่วงเดือนเมษายน มีสินค้าประเภททุเรียนส่งออกด้วยตู้ขนาด 40’HQ Reefer เป็นจำนวนมาก ทำให้อัตราค่าระวางมีการปรับเพิ่มสูงขึ้น

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ญี่ปุ่น เดือน ก.พ. ถึง เม.ย. ปี 2562



	28 Feb 19	31 Mar 19	30 Apr 19
20'DC	300	300	300
40'DC	400	400	400

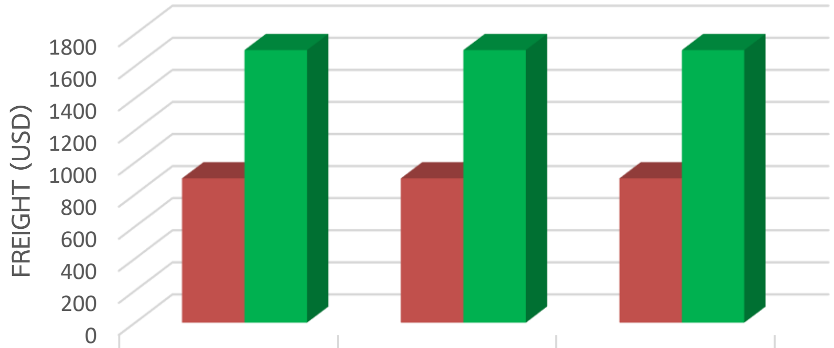
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-Jebel Ali เดือน ก.พ. ถึง เม.ย. ปี 2562



	28 Feb 19	31 Mar 19	30 Apr 19
20'DC	400	600	550
40'DC	600	1000	700

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

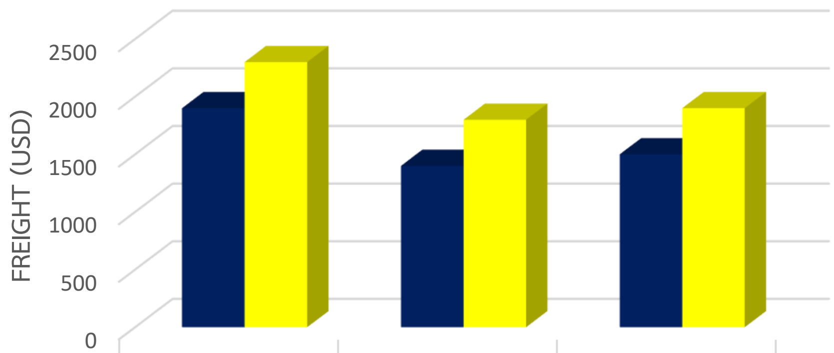
EUROPE



	28 Feb 19	31 Mar 19	30 Apr 19
20'DC	900	900	900
40'DC	1700	1700	1700

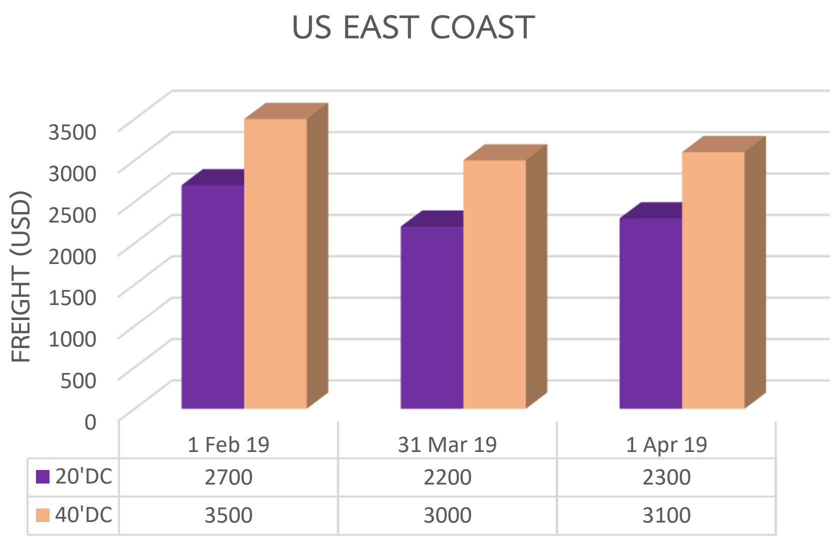
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-สหรัฐอเมริกา West Coast เดือน ก.พ. ถึง เม.ย. ปี 2562

US WEST COAST



	1 Feb 19	31 Mar 19	1 Apr 19
20'DC	1900	1400	1500
40'DC	2300	1800	1900

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-สหรัฐอเมริกา East Coast เดือน ก.พ. ถึง เม.ย. ปี 2562



รวบรวมประกาศจากสายเรือเรื่องการปรับการเรียกเก็บค่าใช้จ่าย

สายเรือ Hapag Lloyd

- ประกาศเรียกเก็บค่า Heavy Lift Charge (HLC) สำหรับสินค้าที่ส่งออกไปยัง North Europe และ Mediterranean ซึ่งจะมีผลบังคับใช้ตั้งแต่วันที่ 1 พฤษภาคม 2562 โดยมีรายละเอียดดังนี้
  USD 100/20'Container over 18 tons payload
  USD 350/20'Container over 23 tons payload
  EUR 90/20'Container over 18 tons payload
  EUR 315/20'Container over 23 tons payload

สายเรือ OOCL

- ประกาศเรียกเก็บค่าหนังสือรับรอง Shipment / Vessel Certificate ในอัตรา 300 บาทต่อชุด โดยมีผลบังคับใช้ตั้งแต่วันที่ 1 พฤษภาคม 2562

IMO 2020 rules 'unlikely to damage box line competition'

Incoming low-sulphur fuel laws could accelerate container line consolidation, with the extra costs associated with the so-called IMO 2020 pushing financially vulnerable carriers into mergers and acquisitions (M&A), container shipping analyst Drewry has reported. But Drewry concludes that even if the new IMO 2020 laws spur another round of mergers, there will still be enough carriers left for the main markets to remain competitive. Examining how the changes might affect competition on key trades, Drewry noted that most of the major carriers have now reported full-year 2018 financial results; "and thanks to a fourth-quarter (4Q18) rising trend in demand and freight rates, boosted by the sugar-rush of the threatened US tariffs, the industry was able to return a small profit in the region of $1.5 billion", as reported in Drewry's Container Forecaster report.

"Welcome as that second-half revival was, attention is now focused on the prospects for this year - and beyond that, what impact the new IMO low-sulphur fuel regulation will have on profitability in 2020," Drewry added, noting that the container shipping industry "still hasn't fully recovered from the global financial crash and the devastating losses incurred thereafter". It noted that an examination of carriers' most-recent financial stability 'Altman Z-score' shows that many are still reside in the so-called "distress zone". As the deadline for the IMO 2020 mandate draws nearer, carriers are inevitably getting jittery about its overall impact, Drewry noted, with lines examining "are they in a position to deal with myriad of extra associated costs such as unrecoverable BAFs, capex costs to install scrubbers and extra funding requirement for bunker credit, among others"? Drewry added: "Without wanting to be too alarmist, there is the potential for IMO 2020 to inspire another major carrier bankruptcy or trigger more defensive M&A. It could turn out that the IMO will inadvertently push industry consolidation along, closer to where it needs to be in order to achieve sustainable profitability." It said the last round of M&A that started with the merger of Chinese carriers Cosco and CSCL in 2016 and concluded with the integration of the Japanese carriers NYK, MOL and K Line into the Ocean Network Express (ONE) in 1Q18, made some headway in the consolidation process - to the extent that the leading seven carriers now control approximately three-quarters of the world's containership fleet.

"However, while previous M&A has handed near-full control of the global market to a handful of lines, there is still varying degrees of competition at a trade-route level," Drewry highlighted. "Significantly, that is the case in some of main large-volume and revenue generating East-West routes. "Using the Herfindahl-Hirschman Index (HHI) method, only one trade in our sample, the relatively small Europe-East Coast South America southbound trade, resides in the 'highly concentrated' bandwidth. Most of the key East-West trades fall into the 'competitive' description."

Drewry said: "The problem for carriers is that in competitive markets they are subject to the vagaries of supply and demand, which is often outside their control. Conversely, in a concentrated market with few rivals carriers do not seem to live or die by those fundamental economic principles so much."

Bearing in mind the potential for more IMO-induced consolidation, Drewry examined what it would take to budge some of those key East-West trades out of the competitive zone and into new territory that might allow them to become price givers rather than takers. "To play this game we need to consider some plausible transactions," Drewry said. "The possibility of any takeovers among the top 7 lines is remote in our opinion, primarily due to the likelihood of such deals being shot down by competition regulators.

"However, in our analysis we found that without at least one such deal the HHI needle barely moved so we have included a combined CMA CGM and Hapag-Lloyd entity as there was interest from the French carrier last year. The other fantasy transactions we have used are Cosco buying PIL and other deals based on common nationality; bringing together the Taiwanese lines Evergreen, Yang Ming and Wan Hai, while also pairing HMM and SM Line from South Korea." Drewry continued: "The next step is to use our base trade capacity data from January 2019 and see what happens when we combine all of those carriers. For the purpose of this analysis we have limited it to the Asia-North Europe and Asia-West Coast North America trades. It should be noted that capacity shares will be different by the time IMO 2020 is implemented as carriers will have taken delivery of new ships and moved others around so some caution should be applied.

"The result of this academic pursuit is that even these deals (which we think stretch the realms of plausibility) would only be sufficient to move these trades into the moderately concentrated zone of the HHI. Carriers would gain some modicum of pricing power, but certainly not enough to be able call the shots."

It concluded: "Even if IMO 2020 does spur another round of industry consolidation, the chances are that there will still be enough carriers left to prevent the big trades from being highly concentrated. It will require a couple of highly unlikely mega M&As to really move the dial."

Source: https://www.lloydsloadinglist.com

Container demand growth set to remain 'muted'

MSI expects the Asia-Europe and transpacific headhaul trades to be difficult for container lines in the coming months, with limited traffic increases likely to be outstripped by capacity rises. Overall container trade volume growth will remain tepid in the summer months, according to Maritime Strategies International.

The analyst said there remained potential for near-term upside for the Eurozone economy and continued strong growth in central and eastern European economies, but the overall demand environment would "remain muted" on both Asia-Europe and transpacific headhaul trades. "Over the next six months we expect growth of around 2.5% on the Asia-Europe headhaul," said MSI. "Without blanked sailings or major changes to the size of vessels deployed, adjusted Asia-Europe westbound capacity over June-August will total around 5.2m TEU. June-August volumes last year totaled 4.2m TEU, so in order to achieve an aggregate load factor of 85%, demand will have to grow by 5%."

MSI concluded, therefore, that the Asia-Europe trade would prove troubling for container lines, although some individual carriers would likely fare better than others. The transpacific eastbound trade is "likely to avoid the most apocalyptic scenarios", but MSI still forecasts the coming quarters will be challenging. "We expect growth over the next quarter will be slightly negative on the US West Coast and slightly positive on the US East Coast, and that US West Coast ports will bear the brunt of the volume crunch," it reported.

The summer peak season is forecast to yield only modest year-on-year growth, but by the fourth quarter, MSI predicts a slowing US economy and the unusual seasonal trade patterns of late 2018 – which were impacted by frontloading due to US-China trade war tariffs – will weigh heavily on year-on-year demand growth rates. "Carriers will be tempted to reduce service offerings, although this will raise the difficulty of redeploying idled tonnage," added MSI. Asia-Europe headhaul volumes expanded by 10% year-on-year in January, although much of this reflected the timing of Chinese New Year which fell early in 2019. On the Transpacific, a tariff frontloading hangover was the dominant driver of volumes.

"In January and February combined, US imports from the Far East shrank by 1% year-on-year," added MSI. "Load factors on both trades will remain under pressure in the coming quarters." Lines were aided by slowing vessel deliveries in the first quarter, however. "February saw slower developments on the industry supply-side," said MSI. "Vessel deliveries totaled only 22,000 TEU, while confirmed demolitions totaled 12,000 TEU, although around 40,000 TEU of vessels were reported as sold for demolition in March." MSI expects 415,000 TEU of new vessel deliveries and 160,000 TEU of capacity to be scrapped over the next six months.

Source: https://www.lloydsloadinglist.com

Former USTR: US trade policy resembles China

Former Obama-era US trade representative Michael Froman on Thursday told a meeting of North American footwear executives that trade tensions between China and the US have pushed the US closer to the Chinese economic model than the other way around. "The idea of [China being admitted to the World Trade Organization (WTO) in 2001] was that China would become more like us," Froman said in a keynote at the Footwear Distributors and Retailers of America (FDRA) Footwear Executive Summit in Washington, DC. "We're becoming more [like the] Chinese, thinking about our needs first and compromise as little as possible from a multilateral perspective. The question is, can the world tolerate two Chinas?"

Froman did not downplay China's role in the escalation of trade tensions between the two nations, much of which occurred before President Donald Trump took office and the current Sino-US tariff battle began. He said the US filed 16 cases against China with the WTO during the Obama administration, which also dangled a bilateral investment treaty as a way to induce China to address practices not aligned with broader WTO membership. “I think China is eager to reach agreement with the US,” he said. “There’s the shopping list issues [i.e., which US products China will import more of] and the structural issues. Someone told me they understand how important it is for Trump to have ‘tweetable deliverables.’” A ‘contrarian viewpoint’ Executives in attendance overwhelmingly decried the administration’s attempts to use tariffs as leverage against China, as well as those on global steel and aluminum imports. Columbia Sportswear CEO Tim Boyle, a vocal critic of the Trump administration on issues from immigration to trade, said Columbia’s products are commonly affected by such mechanisms due to their wide geographic distribution footprint. “So it’s not uncommon we’d have a problem in some geography where a despot would raise tariffs or do something crazy,” he said. “You wouldn’t expect it here, but we’ve learned you have to be prepared for anything.”

The remarks came in a fireside chat with FDRA president and CEO Matt Priest, who asked Boyle if being such a forceful advocate against the president has hurt his business. “We’ve probably ticked off half our consumers,” he said. “But whether you’re running a business or are just a human being, there have to be certain principles. And some of those have to be inviolate. There are certain issues we’re not willing to run from. If people are upset and don’t buy your products because of that, that’s their problem.”

Boyle said it wasn’t completely clear whether the uncertainty caused by tariffs on Chinese imports was having an impact on the greater US economy, but he did say uncertainty is never good for any business trying to plan for the long term.

“What other choice do we have but to go through it?” he said. “I think the economy could be better [without trade uncertainty]. But sometimes as a company, our biggest growth has come in the weakest economic times. We try to be agnostic as it relates to the economy. A lot of bad things are happening right now for business in my point of view. If you’re a farmer today, and you’re picking a crop in six months, how do you make decisions like that? People are being used as pawns for some benefit that I can’t figure out.”

But Froman, now vice chairman and president of strategic growth at MasterCard, said there may be a silver lining to the current administration’s approach to trade. “I’m not terribly pessimistic,” he said during a keynote at the FDRA summit. “In trade, you have to be optimistic and you have to have a long-term view of things.”

Froman was a key cog in the negotiation of the Trans-Pacific Partnership (TPP), a free trade agreement between the US and 11 other Pacific Rim nations, and while he lamented the demise of that agreement in the early days of the Trump administration, he said many of its provisions may end up in a revised North American Free Trade Agreement (NAFTA).

“At the end of the day, Trump may end up being the greatest globalist ever,” he said. “That’s my contrarian view.” Froman’s theory is that Trump’s trade team is essentially augmenting NAFTA with TPP principles to create the deal’s replacement, the United States-Mexico-Canada Agreement (USMCA), but that Trump’s supporters, who implicitly trust him, will allow the president to sell USMCA as a “win” for him and them, even if it’s essentially a combination of the two trade agreements Trump has publicly decried as the “worst deals ever.” Still, Froman called withdrawing from the TPP one of the country’s worst strategic blunders in recent history and outlined three ways Trump’s tariff-heavy approach to trade will be costly to the US economy.

First, there are the direct costs of tariffs, which affect the price of products for consumers and input costs for US-based manufacturers. Second, there is the cost of retaliation, reciprocal duties imposed by other nations that make US exports more expensive — and less competitive — in those markets. Lastly, Froman said there is what he calls the “risk of imitation.” When the US goes against established trading rules — Trump’s use of national security as a justification for global tariffs on imported steel and aluminum, for example — “it gives other countries free reign to do likewise," he said. "Other countries could say 'food security' is a national security issue. Tariffs are easy to put on and hard to take off. We have a 25 percent duty on imported pickup trucks because of the 'chicken wars' with the EU 25 years ago. Imagine how difficult it will be if the Trump administration wants to lift tariffs on steel."

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 29 March 2019	Current Index 4 April 2019
Comprehensive Index			793.49	792.25
Service Routes				
Europe (Base port)	USD/TEU	20%	651	658
Mediterranean (Base port)	USD/TEU	10%	725	711
USWC (Base port)	USD/FEU	20%	1626	1623
USEC (Base port)	USD/FEU	7.50%	2634	2644
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	689	730
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	374	360
East/West Africa (Lagos)	USD/TEU	2.50%	2806	2731
South Africa (Durban)	USD/TEU	2.50%	686	654
South America (Santos)	USD/TEU	5.00%	1573	1418
West Japan (Base port)	USD/TEU	5.00%	230	231
East Japan (Base port)	USD/TEU	5.00%	232	232
Southeast Asia (Singapore)	USD/TEU	7.50%	148	146
Korea (Pusan)	USD/TEU	2.50%	149	149

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