การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 15 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 - 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 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 30, 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 Klang ค่าระวางอยู่ที่ 300 USD/TEU และ 500 USD/FEU และเส้นทาง Japan ค่าระวางอยู่ที่ 300 USD/TEU และ 400 USD/FEU

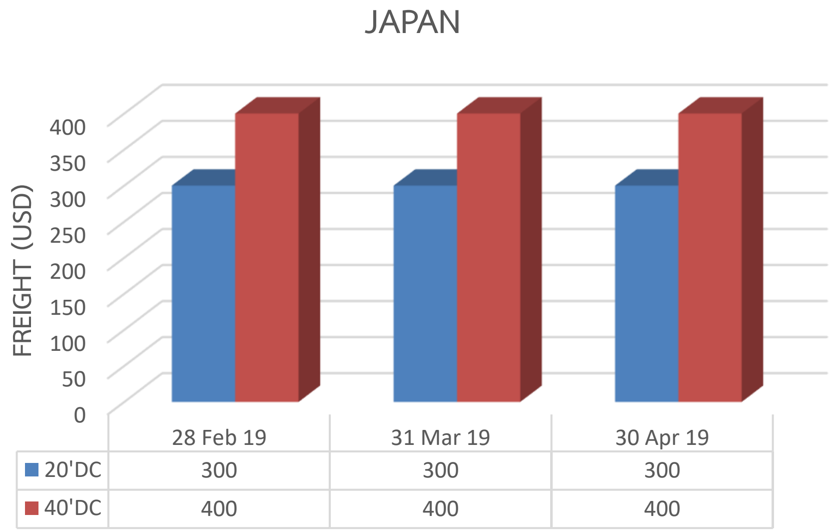
สำหรับเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนหลังของเดือนเมษายน อัตราค่าระวางคงที่ โดยค่าระวางในฝั่ง West Coast อยู่ที่ 1,500 USD/TEU และ 1,900 USD/FEU และอัตราค่าระวางทางฝั่ง East Coast อยู่ที่ 2,300 USD/TEU และ 3,100 USD/FEU ส่วนเส้นทางอื่นที่อัตราค่าระวางยังคงที่เช่นเดียวกัน คือ เส้นทาง Europe อัตราค่าระวางอยู่ที่ 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

CONTAINER FREIGHT RATE (REEFER)

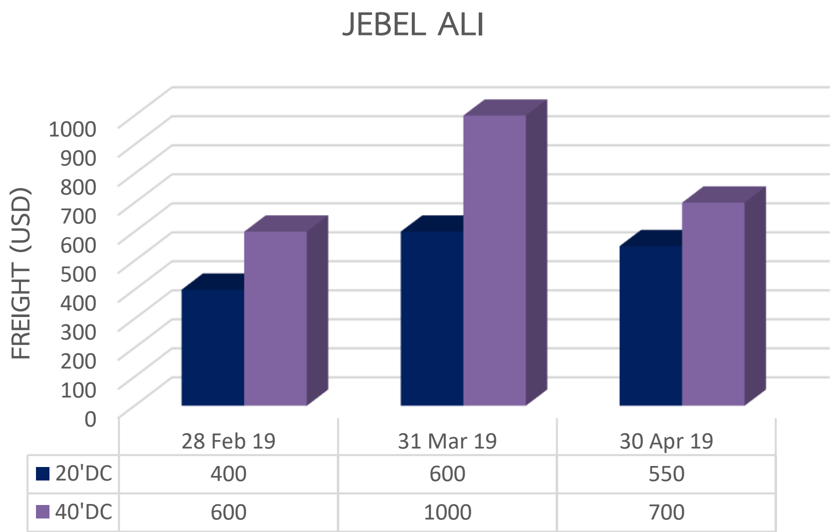
ROUTE	SIZE		Remark
	USD/20’	USD/40’	
Thailand-Hong Kong	800	1,100-1,500	Effective till April 30, 2019
Thailand-Shanghai	900	1,100	
Thailand-Japan (Tokyo, Yokohama)	900	1,200	Effective till April 30, 2019
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,400	1800	

- 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

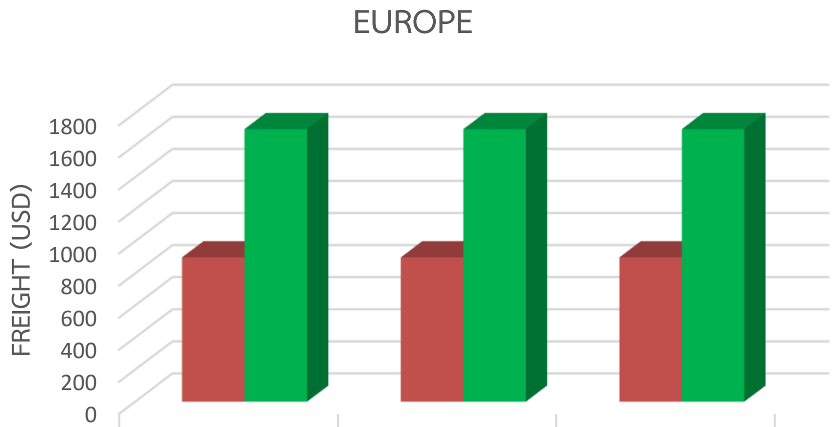
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ญี่ปุ่น เดือน ก.พ. ถึง เม.ย. ปี 2562



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

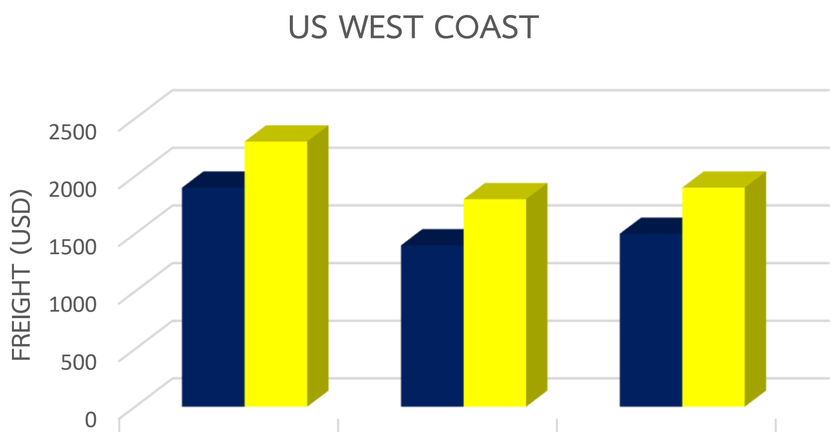


กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน ก.พ. ถึง เม.ย. ปี 2562



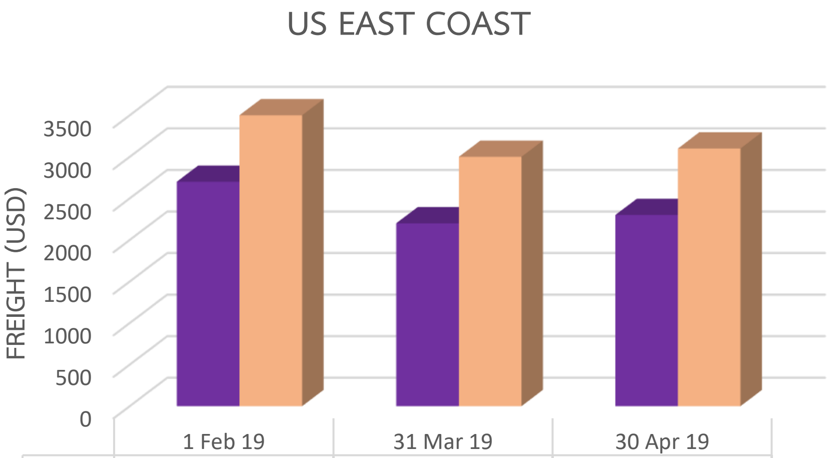
	28 Feb 19	31 Mar 19	30 Apr 19
20'DC	900	900	900
40'DC	1700	1700	1700

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



	1 Feb 19	31 Mar 19	30 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



	1 Feb 19	31 Mar 19	30 Apr 19
20'DC	2700	2200	2300
40'DC	3500	3000	3100

รวบรวมประกาศจากสายเรือเรื่องการปรับการเรียกเก็บค่าใช้จ่าย

สายเรือ Hapag Lloyd แจ้งยกเลิกประกาศเรียกเก็บค่า Winter Surcharge (WSU) สำหรับสินค้าที่นำเข้า-ส่งออกจากประเทศรัสเซีย โดยมีผลบังคับใช้ตั้งแต่วันที่ 1 พฤษภาคม 2562

Governments pursue new shipping emissions measures

The International Maritime Organization's Marine Environment Protection Committee meets in mid-May. While much of the focus will be on the sulphur cap, some governments are keen to build on the historic greenhouse gas emissions strategy that the IMO forged a year ago. Perhaps unsurprisingly, owners and operators are under the spotlight. LARGE shipping nations and European economies are urging shipowners to hasten operational energy efficiency as a precursor to greenhouse gas goals. Japan, France, Denmark, Germany and Spain have all taken the mantle with new proposals to the IMO's next high-level environmental meeting happening in May, calling for measures to attain the industry's short-term self-imposed emissions goals.

Governments must meet the commitment they made last year to slash shipping's total annual greenhouse gas emissions by at least 50% by 2050 compared with 2008. But more immediately, shipping needs to cut its average carbon emissions per transport work, a term that is as vague as it sounds, by at least 40% by 2030 compared with 2008. Vessels are already regulated by the energy efficiency design index, which prescribes the minimum design efficiency improvements of new ships. Countries are now keen on expanding the operational energy efficiency aspect to help meet 40% reduction rate.

To fast track the process, France has suggested implementing speed regulation until 2023 followed by a "goal-based approach" whereby the outcome, not the measure, defines the policy. Fellow EU countries Denmark, Germany and Spain are keen on the second part of this proposal, with a call for energy efficiency targets, without, however, prescribed ways to meeting them. The three countries want shipowners to document that they are meeting specific annual or three-yearly energy efficiency targets.

"It will be up to the shipowners to decide on how to achieve the requirement by either retrofitting the ships to be more energy efficient, or adopting fuel-efficient operations, innovative solutions or by speed reduction, for example by shaft power limitation," their proposal suggests. GHG policy is politically charged and underpinned by financial considerations. There is a strong demand by developing nations and least developed countries, as well as small island developing states, that the impact of any measures on their economies is carefully considered before they are adopted.

The IMO has agreed to avoid burdening these countries as it tries to implement the initial strategy. Every proposed measure will be under scrutiny especially regarding this issue. But Denmark, Germany and Spain appear confident their proposed measure will not be harmful. "The proposed measure would apply to all ships on all flags. Given it is aimed at energy efficiency and leaves shipowners with the choice of how to reach the measure, it is difficult to see how SIDS and LDCs would be disproportionally impacted. This would also depend on the current distribution of more efficient ships," they said.

Instead, they believe the measure will generate cost-efficient investments that will have a quick payback period for shipowners. Japan is also suggesting technical measures on existing ships that enable shipowners to manipulate what they call "enforceable" factors to energy efficiency. Potential tools that shipowners could deploy induces hull design, and even limits to the maximum engine power through a mechanical fuel index sealing system. But the country is weary of prescriptive measures that have to do with commercial aspects of operations and explicitly warned against speed limits as it believes the industry will face difficulties in accommodating different demands within the industry.

"Furthermore, it is legally and technically quite difficult to continuously monitor and regulate the business activity of a ship. Therefore, some flexibility is essential in any measures on business activities. In this context, utilisation of the Ship Energy Efficiency Management Plan or other incentive measures could be a more practical way to address business activities," it said. Energy efficiency measures may appear to be popular among influential countries, but the proposals will not go without deliberation.

China warned in its own submission that developing operational energy efficiency measures is complicated and wants a serious of steps taken rolling out measures, such as create an operational energy efficiency indicator and evaluate the carbon intensity of the whole shipping industry and of individual shipping segments.

Source: https://lloydslist.maritimeintelligence.informa.com

New Digital Container Shipping Association is aiming to make a splash

A container shipping group to help coordinate the industry's rapid digitisation has formally launched after a green light from the US Federal Maritime Commission. MSC, Maersk, Hapag-Lloyd and Ocean Network Express (ONE) officially established the Digital Container Shipping Association (DCSA) last week in Amsterdam, with Maersk's Thomas Bagge named chief executive and MSC's Andre Simha (pictured above) chairman. Mr Simha, who is chief information officer of MSC, said the main aim of DGSA was to establish common information technology standards to make the industry more efficient for both customers and shipping lines.

"For the first time in twenty years, the container shipping industry has a common goal to move the industry into the digital era. With regulatory approval in place, we look forward to the association beginning to collaborate with multiple stakeholders from the entire value chain," he said. In a Q&A session with *JOC* technology editor Eric Johnson at last month's TPM conference in Long Beach, Mr Simha stressed that the development of common technological standards would allow container lines to compete on service levels. "There are so many issues to address in container shipping that technology itself will not be a competitive advantage," he said. "Look at the airline industry – airlines do not compete on online booking, they compete on service levels, networks and prices."

Today, he said the decision to locate the DCSA HQ in Amsterdam "reflected the neutrality" of the organisation, which would "not favour any of the large shipping companies".
He added: "At the same time, it provides proximity to shipping infrastructure and ease of access, as well as being an attractive location for talented employees".

MSC added that two more carries were in the process of joining DCSA, although at TPM Mr Simha had insisted that the partners wanted to keep the number of participants to a minimum. "Everybody's input is welcome, but we need to keep the number of decision-makers to a manageable size; if we can simplify how we communicate with our supply chain partners, then that will benefit everybody," he said.

Source: https://theloadstar.com

Shippers should be 'careful what they wish for' on block exemption regulations

Shippers should think twice about lobbying the EU to lift the block exemption regulation (BER) for liner shipping, it was claimed yesterday. Wading into the recent war of words between shippers and carriers, speakers at the TOC Asia Container Supply Chain conference in Singapore suggested removing the BER would yield no benefit to cargo owners. "There was a lot of heated discussions at the recent OECD meeting in Paris," revealed Sea-Intelligence chief executive Alan Murphy. "All the stakeholders are pissed off with the shipping lines on everything – reliability, blank sailings and how they cooperate in alliances. "Now the EC has given those stakeholders a club to beat the shipping lines with – that the BER should be lifted. "But I don't think they actually want that; I think that would result in a poorer situation for most of the shippers."

The BER, which is the *de facto* legislation covering liner alliances and vessel sharing agreements (VSAs) on container trades to and from Europe, is set to expire on 25 April next year.
Mr Murphy said alliances and VSAs had led to attractive cost savings for carriers, "which they've obviously not retained because they haven't made any money – they've passed the savings on to the shippers and the consequences have been lower freight rates". Furthermore, he noted, if the EC does remove the BER, then VSAs would not become illegal, but rather more difficult and costly to implement, due to additional reporting requirements. As a result, larger carriers would likely continue with VSAs while smaller players would find it more difficult.

Thomas Elling, Hapag-Lloyd's head of sales and customer service, agreed that lifting the BER would not affect carriers' ability to share vessels or space. "That will certainly continue, in any case," he said. "I also don't necessarily see any *per se* break-up of the different alliances as you see them today; that scenario might change if there's another acquisition or merger, but at this point in time that's also not so likely."

Alphaliner chief analyst Tan Hua Joo warned shippers should be "careful what they wish for". "It is unclear on the part of the regulators, as well as the shippers right now, exactly what is the outcome they desire," he said, claiming alliances were "the single largest driver of the very low freight rates in the market".
He added: "If you do remove this as a tool for the shipping lines, are you prepared to accept higher freight rates as a consequence? This is the most likely result of taking away this exemption."

Jeremy Nixon, chief executive of Ocean Network Express (ONE), told *The Loadstar*: "I think it's in the interests of trade, in the interest of the industry both on the shipper side and the carrier side, that consortia continue to operate, because that provides efficient slot costs, the best frequency and widest range of coverage. "The economists are largely in consensus on that and I understand the EU now is reviewing probably not the removal of the block exemption, but possibly some alteration in the protocols or regulations, and we just have to wait for that."

Source: https://theloadstar.com

Chinese exports surge in March

Rebound to unexpectedly high levels followed factories re-opening after Chinese New Year but slowdown in imports continued. Chinese export activity last month showed strong signs that a recovery is underway. Export growth in US dollar terms rose 14.2% year-on-year in March from -4.6% in January-February. However, import growth in USD terms slowed to -7.6% in March from -3.2% from January-February.

The March export surge offered further evidence that Chinese manufacturing is rebounding. As reported in *Lloyd's Loading List*, indicators of Chinese manufacturing export activity - which usually have a bearing on future volumes by ocean and air - picked up through March after several weak months, suggesting the potential for rising trade demand out of the world's leading export nation in the months ahead. Nomura said the March export bounce-back was much stronger than expected, but added that this was partly due to calendar effects related to the Lantern Festival, which was on 2 March last year but on 19 February this year. "After combining the January-March data, growth of exports dropped to 1.4% year-on-year in Q1 from 3.9% in Q4 2018, indicating a continued weakening of export growth," said the analyst. "Import growth slumped to -4.8% y-oy in Q1 from 4.4% in Q4."

Nomura expects that export growth in March, at 14.2% year-on-year, is unlikely to be sustained unless sluggish external demand improves. It also noted that an ongoing downswing in the global tech sector and recent RMB appreciation would offer additional headwinds. "The value-added tax cut for the 16% bracket to 13% for manufactured goods, effective on 1 April, may also have pushed exporters to speed up custom clearing in March to avoid a reduction in VAT rebates," it added. Nomura said market signals at this stage were unclear but suggested some downward pressure on headline export growth in April and May was likely.

By contrast, import growth could rebound in April and May due to China's pledge to increase imports from the US, domestic policy stimulus and distortions due to VAT cuts which could see importers postpone custom clearance of imports to pay lower VAT on imported goods. "March's significant jump in export growth was broadly based across destinations," said the analyst. "Export growth to most destinations improved, with growth of exports to the EU, Japan and ASEAN surging to 23.7% y-o-y, 9.6% and 24.8%, respectively, from 1.5%, -1.2% and 0.9% in January-February.

"On a quarterly basis, the slowdown in year-on-year growth of Q1 exports from Q4 2018 was led by exports to the US (to -9.0% y-o-y in Q1 from 6.3% in Q4 2018), Japan (to 2.4% from 3.8%;), Russia (to 3.3% from 10.1%) and Brazil (to -2.4% from 2.0%), while that to the EU (to 8.1% from 6.2%) and ASEAN (to 9.1% from 7.4%) rose."

Export growth to the US increased to 3.7% y-o-y in March from -14.6% in January-February but slowed to -9.0% y-o-y in Q1 from 6.3% in Q4 2018. Nomura said demand was likely sluggish due to "payback effects" following the front-loading of exports and the ongoing 10-25% tariff hikes on $250bn worth of US-bound exports.

Growth of imports from the US remained sluggish in March, although ticking up to -25.8% y-o-y from -35.0% in January-February, which resulted in growth declining to -31.6% in Q1 from -23.0% in Q4 2018.

As a result, the trade surplus with the US dropped to $20.5bn in March from a monthly average of $21.0bn in January-February and a 2018 monthly average of $27.0 billion.

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 4 April 2019	Current Index 12 April 2019
Comprehensive Index			792.25	782.46
Service Routes				
Europe (Base port)	USD/TEU	20%	658	640
Mediterranean (Base port)	USD/TEU	10%	711	715
USWC (Base port)	USD/FEU	20%	1623	1606
USEC (Base port)	USD/FEU	7.50%	2644	2638
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	730	734
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	360	339
East/West Africa (Lagos)	USD/TEU	2.50%	2731	2691
South Africa (Durban)	USD/TEU	2.50%	654	644
South America (Santos)	USD/TEU	5.00%	1418	1434
West Japan (Base port)	USD/TEU	5.00%	231	231
East Japan (Base port)	USD/TEU	5.00%	232	232
Southeast Asia (Singapore)	USD/TEU	7.50%	146	145
Korea (Pusan)	USD/TEU	2.50%	149	122

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