

การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 2 พ.ศ. 2563



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	300	450		
(North & South)	Subject to CIC at destination			
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	-	Effective till
Thailand - US East Coast	2,700	3,250		14-Jan-2020

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

สถานการณ์ค่าระวางในช่วงเดือนมกราคม 2563 อัตราค่าระวางในเส้นทางเอเชียส่วนใหญ่คงที่ไม่มีการเปลี่ยนแปลง 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 สำหรับเส้นทางแอฟริกาใต้ช่วงครึ่งเดือนหลังของเดือนมกราคม ค่าระวางคงที่ ทำให้ค่าระวางอยู่ที่ 850 USD/TEU 1,600 USD/FEU

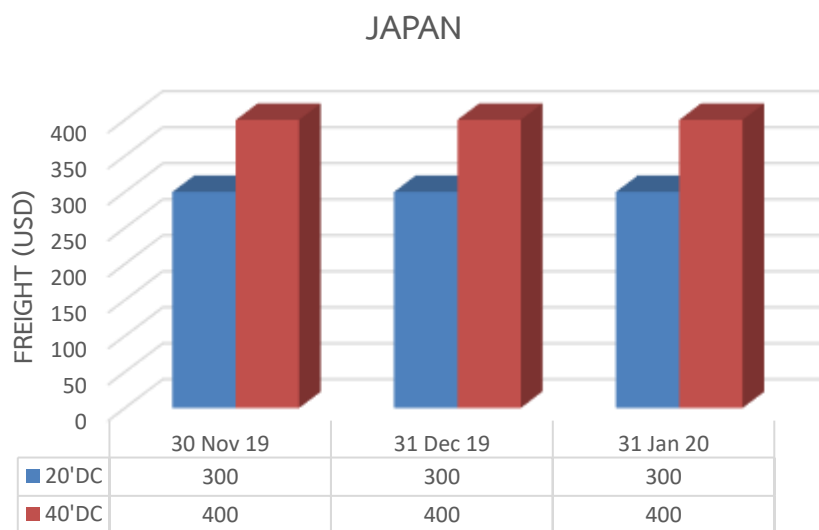
สำหรับเส้นทาง Europe ค่าระวางช่วงครึ่งเดือนหลังของเดือนมกราคมยังคงที่ โดยค่าระวางอยู่ที่ 850 USD/TEU และ 1,600 USD/FEU โดยมีการเรียกเก็บค่า ISOCC ในอัตรา 141 USD/TEU ซึ่งเป็นค่าน้ำมันแยกต่างหากจากค่า LSS ส่วนเส้นทาง Australia อัตราค่าระวางเรียกเก็บอยู่ระหว่าง 275-425 USD/TEU และ 550-800 USD/FEU และมีการเรียกเก็บค่า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

ในขณะที่เส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนแรกของเดือนมกราคม ค่าระวางฝั่ง West Coast ปรับเพิ่มขึ้น 400 USD/TEU และ 500 USD/FEU ทำให้ค่าระวางอยู่ที่ 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)

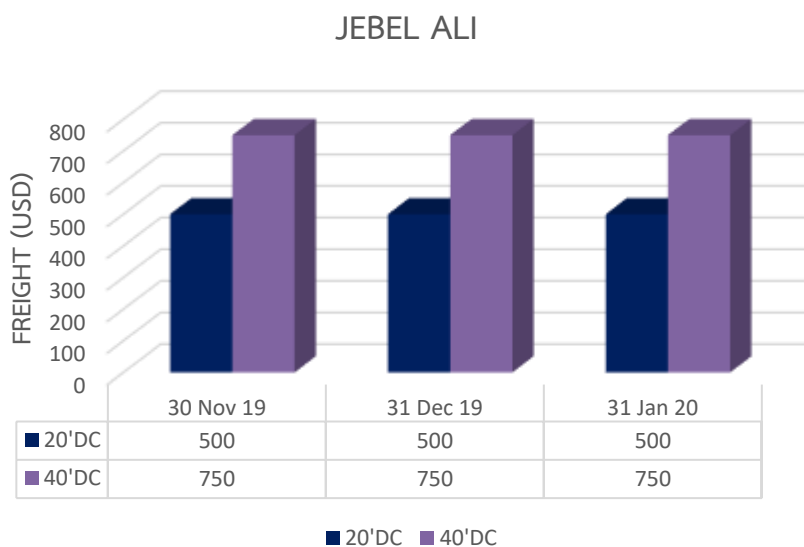
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	800	900	USD 90/TEU, USD 180/FEU	Effective till 31-Jan-2020
Thailand-Shanghai	800	900		
Thailand-Japan (Tokyo, Yokohama)	900	1,200	USD 40/TEU, USD 80/FEU	
Thailand-EU (Main Ports) (DEHAM, NLRMT, FRLEH)	1,400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

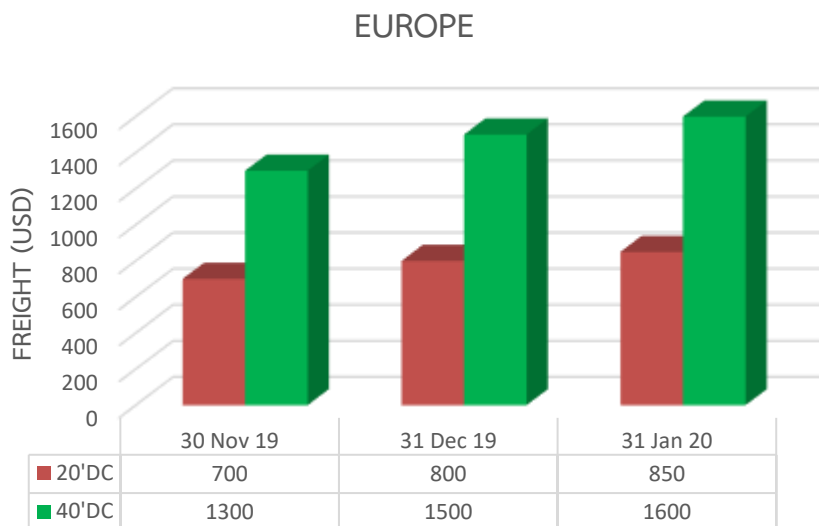
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-Jebel Ali** เดือน พ.ย. 2562 ถึง ม.ค. ปี 2563



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



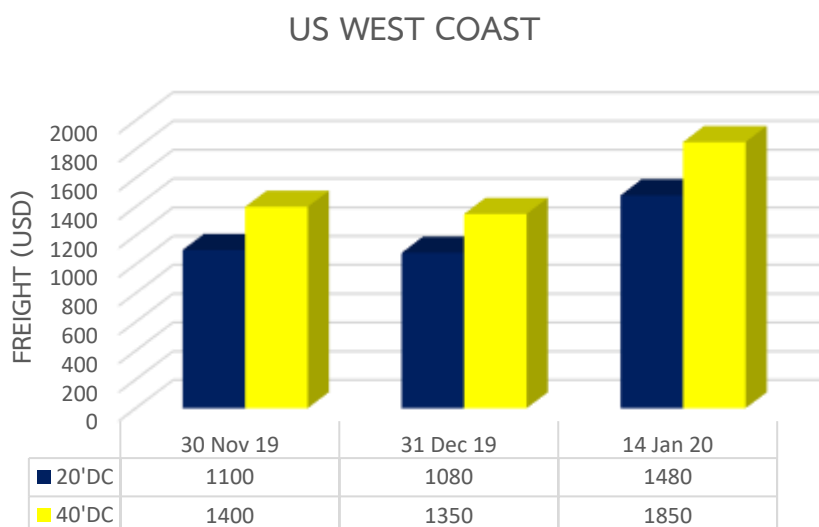
December is subject to

ENS: USD30/BL

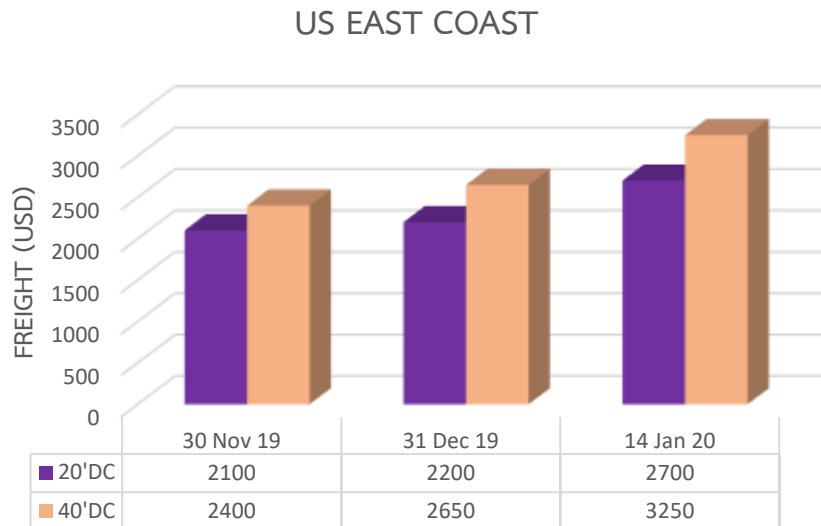
Low Sulphur Surcharge: USD20/TEU และ USD40/FEU

ISOCC: USD141/TEU และ USD282/FEU

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



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



รวบรวมประกาศการปรับค่าใช้จ่ายจากสายเรือ

สายเรือ Hapag Lloyd

- ประกาศเรียกเก็บค่า Currency Adjustment Factor สำหรับสินค้าในเส้นทางขาเข้า และขาออกจาก East Asia ไปยัง North Europe และ Mediterranean ในอัตรา 2.14% โดยมีผลตั้งแต่วันที่ 1 กุมภาพันธ์ 2563
- ประกาศเรียกเก็บค่า General Rate Increase (GRI) เฉพาะสินค้าเกษตรตู้ Dry Container จากเส้นทางสหรัฐอเมริกา มายัง East Asia ในอัตรา USD 50/TEU และ USD 100/FEU โดยมีผลตั้งแต่วันที่ 1 กุมภาพันธ์ 2563
- ประกาศเรียกเก็บค่า General Rate Increase (GRI) จากเส้นทาง East Asia ไปยัง East Coast South America ในอัตรา USD 600/ตู้ โดยมีผลตั้งแต่วันที่ 15 มกราคม 2563

Qatar Summit to reveal potential for maritime-logistics alignment

Maritime and logistics are moving closer together under pressure to be both sustainable and innovative. A major new summit in Doha, Qatar will reveal how this can be done. The next decade is likely to see a closer alignment of the maritime and logistics sectors.

This alignment will coincide with two trends of global significance that will increasingly shape the decisions we take about investment in the infrastructure needed to keep maritime and logistics businesses active. These trends are, firstly, a deeper concern for sustainability — most obviously in the need to protect a vulnerable environment — and, second, a keener perception of the impact of next-generation technologies on the world of work, particularly related to transportation. There is nowhere better to explore the interaction of sustainability, new technologies and changes to employment than in a rapidly expanding economy that is open to fresh ideas and ready to support them financially.

The government of Qatar, led by Prime Minister Abdullah bin Nasser bin Khalifa Al Thani, has shown its willingness to take on huge projects such as the construction of a fleet of sporting stadiums of regional and

international standing and the development of the new Hamad Port. Qatar's ambition is a powerful catalyst for development that will make the 2020s a decade of transition to intelligent supply chains.

Lloyd's List is leading an investigation into the changing maritime and logistics worlds in February in a summit that brings together the senior voices from across Qatar and beyond.

These include Mwan Qatar, the national ports management business that is supporting the summit; Qatar Petroleum, the state-owned petroleum company; the terminal operator QTerminals; Gulf Warehousing Company and Qatar Free Zones Authority. Regional leads from transport ministries, classification, liner shipping, and maritime intelligence will also be contributing to this exciting new exploration of maritime and logistics in the decade ahead. Delegates at this summit will hear how shipping is transforming in fuels and propulsion systems, trading patterns and ports and terminals requirements; how energy suppliers are realigning their businesses to meet new expectations; how digital processes are revolutionising the supply chain from manufacturer through to end-user; and how the culture of safety will influence every decision taken throughout the logistics process.

The Qatar Maritime and Logistics Summit 2020 will identify which trends are likely to have the greatest impact on transportation in the Middle East region and world-wide, and how swiftly we will need to act on these trends to stay in business. The Qatar Maritime & Logistics Summit will be held at the Sheraton Grand Doha Resort & Convention Hotel in Doha on Tuesday February 18, with guided tours and a gala dinner on Wednesday February 19, 2020.

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

Fuel surcharge variations muddy container spot market

Less than two weeks after the global low-sulfur mandate took effect, shippers are trying to determine just how much more they're paying for container spot rates amid wide variations in the scale of low-sulfur surcharges pushed by carriers. Container line executives and analysts say they expect confusion over just how much cargo owners have to pay to help carriers cover higher operating costs by the early spring, coinciding with when most cargo owners begin annual service contracts. "It's a complete mess," Philip Damas, head of Drewry Supply Chain Advisors, told JOC.com Friday. Drewry surveyed the changes in the bunker adjustment factors (BAFs) of five carriers from the fourth quarter of 2019 and the first quarter of 2020. "Some carriers' BAFs increased by 40 percent in Q1 2020, whereas other carriers' BAFs increased by just 15 percent," he said.

In the meantime, carriers are trying to recoup the costs from the International Maritime Organization (IMO) mandate in two different ways. Some are pushing higher fuel surcharges while easing base cargo rates, while others are posting more moderate increases in fuel surcharges and trying to keep spot freight rates steady. Whatever tact they take, the industry needs to recoup approximately \$14.9 billion more in annual higher fuels, according to Sea-Intelligence Maritime Consulting. Under the IMO rule that went into effect Jan. 1, carriers are required to burn fuel with sulfur content of not more than 0.5 percent or install emissions-cleaning scrubbers in order to continue burning high-sulfur fuel.

The market is still very fluid, with some carriers making their first significant low-sulfur fuel purchases just a week ago. Cargo owners with 2019-2020 service contracts have already accepted the BAFs negotiated last year for this interim period before the 2020-21 service contracts are hammered out later this spring, said Larry Burns, senior vice president of trade and sales at Hyundai America Shipping Agency. Customers who are shipping under these contracts have not diminished their volumes in search of lower rates on the spot market in early January, Burns said. "In fact, our bookings have actually risen quite a bit," he said.

Damas cautioned that shippers should consider the all-inclusive spot rate, which includes the base ocean charge plus the BAF, in order to calculate the impact on shipments from Asia to North America. The all-in rates of two different carriers could be similar even if the BAF portion varies widely because one carrier will lower the base ocean rate in order to show a higher BAF, with another carrier doing just the opposite. Damas noted that a large number of beneficial cargo owners (BCOs) last year were able to head off huge BAF increases in early 2020 by presenting their own BAF formulas to carriers, which by and large were accepted. He said mid-size BCOs would be wise to adopt a similar strategy.

Watching the spread

Shippers on the Asia-Europe trades have told JOC.com they subscribe to the belief that the low-sulfur fuel surcharges will decline as the spread narrows, and this was reflected in the annual rates they negotiated in 2020 contracts. Shippers reported long-term contract rates at levels similar to — and, in some cases, even below — those secured for 2019. “On a short-term basis, rates have gone up, fueled by Chinese New Year and combined with the low-sulfur issue, but to counter that, large Europe BCOs have signed new contracts that are only slightly higher than last year,” the logistics manager for an Asia-Europe ocean shipper said.

“The shipping lines have not been able to push through their full surcharge, and I believe that is fair because the spread between the IFO380 and LSFO [low-sulfur fuel oil] should get much smaller throughout the year,” the source added. The wide spread between the price of low-sulfur and high-sulfur fuel is expected to peak in the first quarter before gradually narrowing for the rest of the year, a development that in theory would be accompanied by a reduction in carriers’ low-sulfur fuel surcharge levels, according to IHS Markit analyst Rahul Kapoor.

The vice president of research and analysis for IHS Markit’s Maritime and Trade division said the narrowing spread would be driven by a decline in the price of LSFO due to improved availability, as well as an increase in high-sulfur fuel oil (HSFO) values. But Kapoor said fuel surcharges falling in tandem with a tightening of the high-low fuel spread was by no means a given. “In an ideal world, surcharge levels should mimic that decline, but given lack of transparency from the carriers, the direct relationship is unlikely to exert itself,” he said.

The LSFO price this week rose to \$653 per ton, according to an average taken by IHS Markit across the bunkering hubs of Singapore, Rotterdam, New York, and Fujairah. It is up almost 20 percent compared with the first week of December, and currently 87 percent more expensive than HSFO.

Tactical approaches

Patrik Berglund, CEO of ocean rate benchmarking platform Xeneta, said contract negotiations between shippers, forwarders, and carriers have revealed different tactics as both parties factored in the impact of the IMO 2020 mandate. “Some shippers report agreeing on fixed rates with baked-in IMO 2020 charges for first quarter 2020, with these rates actually coming in at a lower level than pre-IMO contracted rates negotiated earlier in 2019,” he said. “Others have opted for a flexible approach, agreeing on quarterly bunker adjustments, with a wait-watch-and-see approach, while a further group have adopted a mix of both strategies.”

He said if shippers could delay procurement of new freight rates for as long as possible, it would be advisable to wait and sit it out for the first quarter of the year, as delaying negotiations and monitoring freight rate developments over the first few months of IMO 2020 should provide a better view on the LSFO pricing, which could then inform the surcharges.

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

Carriers 'stick to their guns' on rates, hoping to sail through post-CNY downturn

Having succeeded in pushing up container spot rates from Asia to Europe and to the US, ocean carriers are now turning their attention to securing as much cargo as they can for sailings after the Chinese New Year (CNY) holiday. However, the lines' strategy could mean significant delays in the supply chain as shippers suffer container rollovers. With the majority of headhaul ships fully booked ahead of CNY, which begins on 25 January, carriers are planning to roll some 'non-premium' cargo into the soft demand holiday period as base traffic for sailings that have not been blanked.

Moreover, *The Loadstar* has heard of discounts being offered to shippers for February voyages, although there is no evidence so far of any significant rate cutting on European or transpacific routes. "They think that, with their blanking programmes and the rollovers, they will get through a downturn in demand, and we are finding that they are sticking to their guns on rates," one UK forwarder told *The Loadstar*.

Martin Holst-Mikkelsen, EMEA head of ocean freight at Flexport, added: "The carriers remain very disciplined on capacity management across all alliances, which is likely to support a slower rate erosion in February and March." He noted that February would see an overall capacity reduction of around 25% on the Asia-North Europe trade with all the alliances having announced void headhaul sailings in March – some even extending blanking programmes into April. Meanwhile, after a gain of 19% over the Christmas period, the North Europe component of today's Shanghai Containerized Freight Index (SCFI) edged down by 5.9%, to \$1,058 per teu, reflecting the modest discounts being offered by carriers for February sailings.

For Mediterranean ports, the market held firm, ticking down slightly to \$1,179 per teu. The SCFI said "most vessels had departed to Europe with full loads of pre-holiday rush cargo". There were also encouraging signs for carriers on the transpacific tradelanes after a surge of 22% and 15% for spot rates in the last two weeks of December, for the US west and east coasts. The SCFI recorded a 'readjustment' 5.7% drop in rates for US west coast ports from Asia to \$1,543 per 40ft, while rates to the east coast actually put on 2.8% to \$2,888 per 40ft.

Carriers on the transpacific appear to be adopting similar levels of rate discipline as on the European routes, with sentiment being underpinned by tight capacity controls. However, some of the success can be attributed to the artificial tightening of supply caused by the substantial number of vessels temporarily out of service for the retrofitting of scrubbers.

According to Alphaliner data, 95 ships for 925,000 teu, or almost 70% of inactive containership fleet is due to vessels being either at yards, or waiting in turn for scrubbers to be fitted. There was also more evidence to suggest that US-China trade relations were beginning to thaw with confirmation that China's vice premier, Liu He, would travel to Washington to sign the 'phase one' trade deal with the US on Wednesday.

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 3 January 2020	Current Index 10 January 2020
Comprehensive Index			1022.72	1002.58
Service Routes				
Europe (Base port)	USD/TEU	20%	1124	1058
Mediterranean (Base port)	USD/TEU	10%	1185	1179
USWC (Base port)	USD/FEU	20%	1636	1543
USEC (Base port)	USD/FEU	7.50%	2808	2888
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	1218	1175
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	949	937
East/West Africa (Lagos)	USD/TEU	2.50%	2744	2873
South Africa (Durban)	USD/TEU	2.50%	1159	1150
South America (Santos)	USD/TEU	5.00%	2183	2136
West Japan (Base port)	USD/TEU	5.00%	226	226
East Japan (Base port)	USD/TEU	5.00%	242	243
Southeast Asia (Singapore)	USD/TEU	7.50%	176	191
Korea (Pusan)	USD/TEU	2.50%	118	120

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