

การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 28 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 17/TEU, USD 34/FEU	Effective till 31-Jul-2020
Thailand - Qingdao	300	450		
Thailand - Hong Kong	100	200		
Thailand - Japan (Main Port)	300	400		
Thailand - Kaohsiung	100	180		
Thailand - Klang	300	500	Subject to ISOCC USD 11/TEU, USD 23/FEU	
Thailand - Jakarta	400	600		
Thailand – Ho Chi Minh	250	350		
Thailand - Cat Lai	70	100		
Thailand - Singapore	80	150		
Thailand - Manila	300	450		
(North & South)	Subject to CIC at destination			
Thailand - Jebel Ali	500	750	Subject to ISOCC USD 23/TEU, USD 46/FEU	
	Subject to War Risk Surcharge: USD 35/TEU, USD 70/FEU			
Thailand - South Korea (Busan)	100	200	-	
Thailand - South Korea (Incheon)	150	300		
Thailand - Melbourne	450-600	850-1100	-	
Thailand – Durban / Cape Town	850	1600	Subject to ISOCC USD 68/TEU, USD 136/FEU	
	Subject to SCMC USD 30/BL			
Thailand – Europe (Main Port)	850	1,600	ISOCC: USD 53/TEU, USD106/FEU	
	Subject to ENS USD30/BL			
Thailand - US West Coast	2,200	2,700	-	Effective till 19-Jul-2020
Thailand - US East Coast	2,600	3,200		
	Subject to Panama Low Water USD 30/Container			

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

สถานการณ์ค่าระวางในช่วงเดือนกรกฎาคม 2563 อัตราค่าระวางในเส้นทางเอเชียคงที่ไม่มีการเปลี่ยนแปลง แต่มีการปรับลดค่า Low Sulphur Surcharge ลง โดยในบางเส้นทาง เช่น เส้นทางเกาหลี ปรับยกเลิกการเรียกเก็บ 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 Busan ค่าระวางอยู่ที่ 100 USD/TEU และ 200 USD/FEU และเส้นทางแอฟริกาใต้ ค่าระวางยังคงที่อยู่ที่ 850 USD/TEU 1,600 USD/FEU

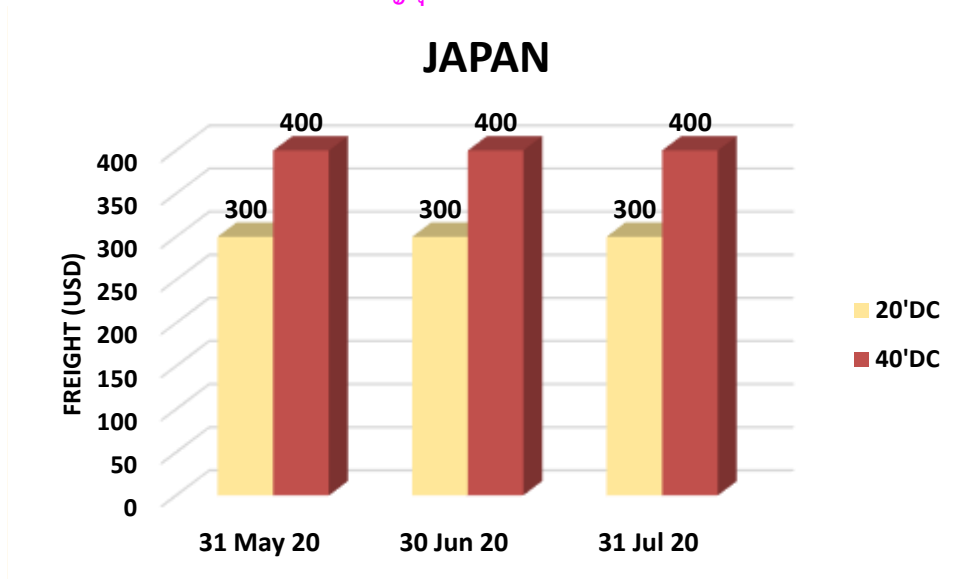
สำหรับเส้นทาง Europe ค่าระวางปรับเพิ่มขึ้น 250 USD/TEU โดยค่าระวางอยู่ที่ 850 USD/TEU และ 1,600 USD/FEU แต่มีการปรับลดค่า Low Sulphur Surcharge ส่วนเส้นทาง Australia อัตราค่าระวางปรับลดลง 50 USD/FEU โดยเรียกเก็บอยู่ระหว่าง 450-600 USD/TEU และ 850-1,100 USD/FEU และมีการปรับยกเลิกการเรียกเก็บค่า FAF

สำหรับเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนหลังของเดือนกรกฎาคม (สัปดาห์ที่ 29) ค่าระวางปรับลดลง 200 USD/TEU และ 300 USD/FEU ทำให้ค่าระวางฝั่ง West Coast อยู่ที่ 2,200 USD/TEU และ 2,700 USD/FEU ในขณะที่ฝั่ง East Coast ค่าระวางอยู่ที่ 2,600 USD/TEU และ 3,200 USD/FEU โดยมีการเรียกเก็บค่า Panama Low Water (PLW) ในอัตรา 30 USD/ตู้

CONTAINER FREIGHT RATE (REEFER)

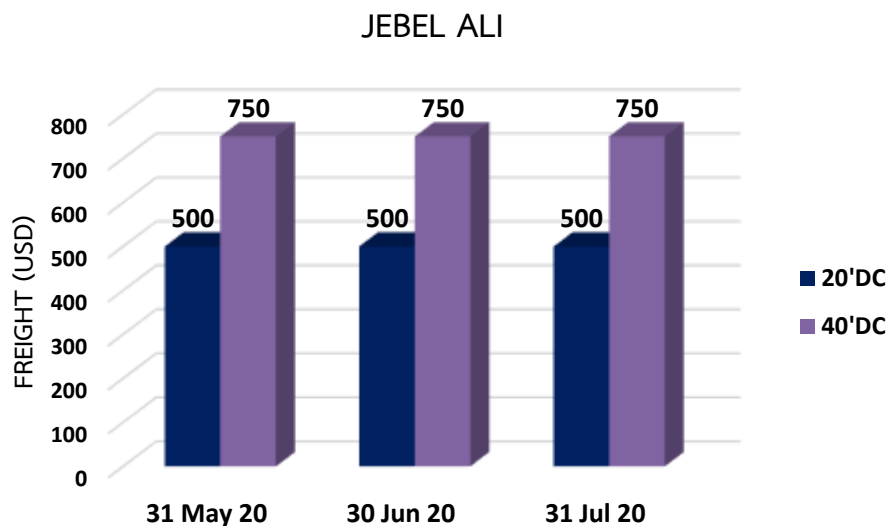
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	800	900	USD 30/TEU, USD 55/FEU	Effective till 31-Jul-2020
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	900	1,200	-	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,500-1,550	1,900-2,000	-	

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-ญี่ปุ่น** เดือน พ.ค. ถึง ก.ค. ปี 2563



Subject to Low Sulphur Surcharge (May & Jun.): USD 86/TEU และ USD 172/FEU
(July): USD 17/TEU และ USD 34/FEU

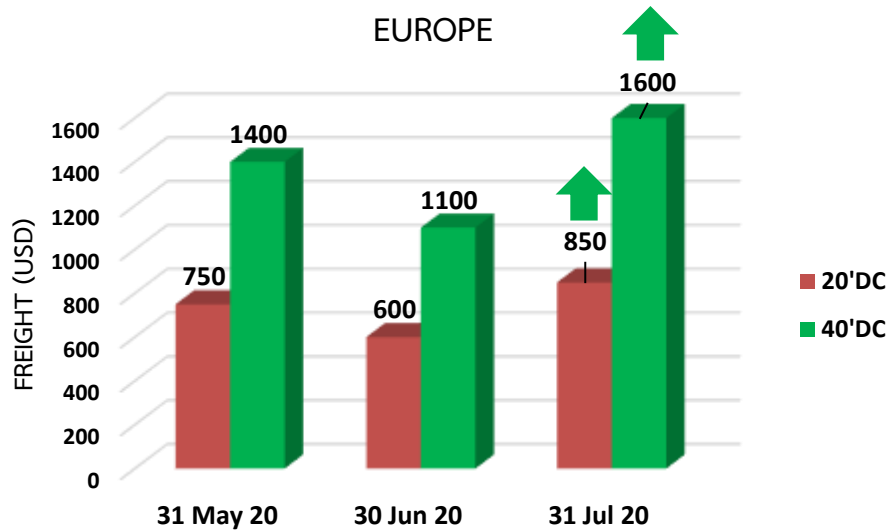
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-Jebel Ali** เดือน พ.ค. ถึง ก.ค. ปี 2563



Subject to

- War Risk Surcharge: USD35/TEU และ USD70/FEU
- Low Sulphur Surcharge (May & Jun.): USD101/TEU และ USD202/FEU
(July): USD23/TEU และ USD46/FEU

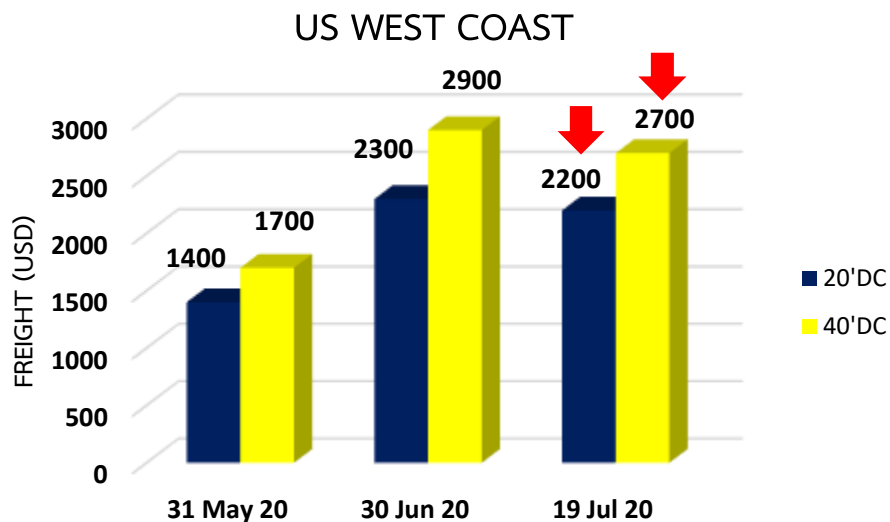
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน พ.ค. ถึง ก.ค. ปี 2563



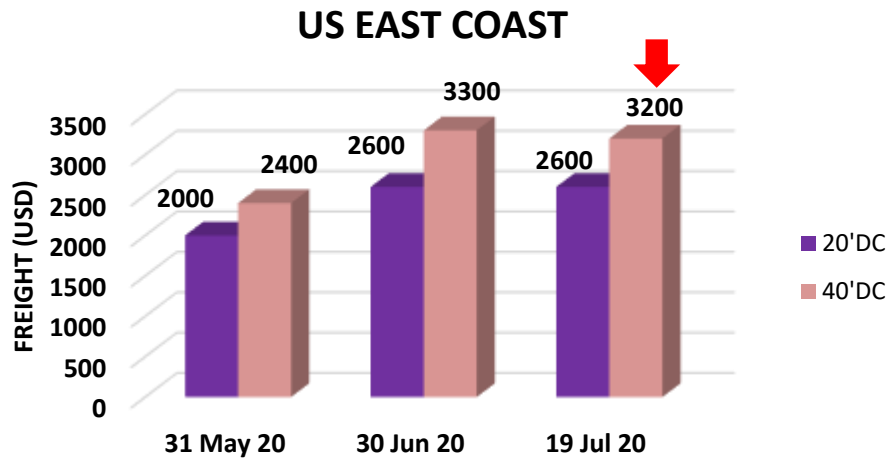
Subject to

- ENS: USD30/BL
- ISOCC (May & Jun.): USD177/TEU และ USD354/FEU
(July): USD53/TEU และ USD106/FEU

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



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



Subject to Panama Low Water Surcharge: USD 30/Container

➤ รวบรวมประกาศสำคัญจากสายเรือ

สายเรือ Hapag Lloyd

- ประกาศปรับการเรียกเก็บค่า General Rate Increase (GRI) สำหรับสินค้าจากเส้นทาง East Asia ไปยังเส้นทางสหรัฐอเมริกา และแคนาดา ดังนี้

Routing	General Rate Increase (GRI)	
	Effective 1-Jul-2020	Effective 15-Aug-2020
East Asia to USA & Canada	USD 1,200/TEU, USD 1,500/FEU	USD 960/TEU, USD 1,200/FEU

สายเรือ MSC

- ประกาศเรื่องความหนาแน่นของท่าเรือ Yantian โดยพบปัญหาการขาดแคลนปลั๊กสำหรับตู้ Reefer ทำให้สายเรืออาจมีความจำเป็นต้องเปลี่ยนแปลงไป Discharge ตู้สินค้าที่ท่าเรืออื่นแทน ซึ่งอาจทำให้เกิดค่าใช้จ่ายเพิ่มเติม อย่างไรก็ตาม หากผู้ส่งออกมีสินค้าไปยังเส้นทางดังกล่าว โปรดตรวจสอบข้อมูลกับสายเรือ โดยอาจต้องมีการแจ้งเปลี่ยนแปลงสถานที่รับสินค้าของผู้นำเข้า

NCB reports 'alarming' level of misdeclared dangerous cargo

Recent inspection initiative by US National Cargo Bureau found more than half of containers non-compliant, 43% failing to secure dangerous goods correctly, and more than 6% of containers carrying dangerous cargo misdeclared. A recent inspection initiative by the US National Cargo Bureau (NCB) – a US inspection body authorised to certify compliance with dangerous goods regulations – has highlighted an “alarming” level of misdeclared and non-compliant dangerous cargo in container shipments, with more than half of containers non-compliant and more than 6% of containers carrying dangerous cargo misdeclared.

In a white paper published yesterday, the NCB called for industry “to adopt a comprehensive, holistic and coordinated approach to address this worrying trend” and called for “urgent reform to stem the increasing number of container-related incidents caused by poorly stowed, undeclared or misdeclared dangerous

cargoes”. It reported that a recent inspection initiative “revealed an alarming number of containers carried by sea include misdeclared dangerous cargoes that represent a serious safety risk to crew, vessel and the environment”.

The inspection initiative also showed that 55% of containers were non-compliant with 43% failing to secure dangerous goods correctly within the container itself. Approximately 6.5% of containers carrying dangerous cargoes had been misdeclared, the NCB added. “It has been reported that, on average, a containership suffers a major fire every 60 days,” the organisation noted. “However, in 2019 there were nine major containership fires reported suggesting that the frequency of incidents is increasing. “Tragically, these incidents often result in loss of life, severe damage to hull and cargo as well as a series of associated consequences including significant environmental impact. It is strongly suspected that these vessel incidents were caused by issues related to poorly stowed, undeclared or misdeclared dangerous cargoes.”

Containership fires

Other bodies have also expressed concerns about rising frequencies of containership fires, often blamed on issues related to poorly stowed, undeclared or misdeclared dangerous cargo. Following a series of fires last year, freight insurance specialist TT Club also estimated that there was now a casualty at least once every 30 days, up from once every 60 days in past years. With more containers being carried and containerships getting bigger, the NCB said “risks are increasing in number, value and concentration”.

NCB president Ian Lennard commented: “The link between undeclared, misdeclared or poorly stowed dangerous cargoes and the increased incidence of catastrophic containership fires is hard to ignore. Because of the clear and present risk predominately to safety of life but also to ships, their cargoes and the environment, we are calling for all supply chain participants to work on a solution together.” He continued: “The reasons for issues with dangerous cargoes are diverse and include a challenging regulatory environment; cargo prohibitions; more complex supply chains; and varied levels of understanding and processes. Because of this, it is important that the stakeholders work together and adopt a range of measures that will address all potential causes.”

The NCB white paper details 12 recommendations as part of their holistic approach ranging from embracing a safety culture for dangerous goods compliance to practical measures for container and vessel inspections and monitoring. Taken together, NCB said it was “confident that its recommendations will be effective in reversing the current trend of increasing containership fires”. The white paper, titled ‘A comprehensive holistic approach to enhance safety and address the carriage of undeclared, misdeclared and other non-compliant dangerous goods’, can be downloaded from www.natcargo.org/Holistic_Approach

Fines by carriers

Some carriers last year unveiled plans to fine shippers for failing to correctly declare hazardous cargo. But such moves by carriers are unlikely by themselves to change the behaviour of the criminally minded, with other measures needed in response to rising numbers of containership fires, container shipping analyst Drewry said last year. Drewry said the time had come “to name and shame rogue shippers that threaten the safety of the supply chain”, adding: “If governments won’t or can’t do more to assist with container checks, they can at least give shipping lines more tools to do it themselves, such as allowing some sharing of information on habitual criminals.”

Drewry noted that over a quarter of all liner fires reported to the Cargo Incident Notification System (CINS) relate to misdeclared cargoes, particularly of the hazardous kind. “It is an age-old problem that has blighted shipping for too long: rogue shippers wilfully breaking the rules to avoid freight rate and insurance

premiums on dangerous goods, or committing customs fraud by declaring high value goods as more common items,” Drewry added.

The National Cargo Bureau is a non-profit organisation created to assist the United States Coast Guard in discharging its responsibilities under the 1948 International Convention for Safety of Life at Sea, which addressed the carriage of Dangerous Goods and Grain cargoes for the first time. Under the authority of the United States Coast Guard, the certificates issued by National Cargo Bureau may be accepted as prima facie evidence of compliance with the provisions of the Dangerous Cargo Act and the Rules and Regulations for Bulk Grain Cargo. It conducts tens of thousands of marine surveys and inspections related to the transport of dangerous goods on behalf of vessel operators, marine terminals, insurers and shippers in support of its mission each year.

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

Strong demand on Asia-Europe sees carriers hike rates and bring in surcharges

Demand remains strong on the Asia-North Europe trade, with full ships encouraging carriers to increase rates and introduce peak season surcharges (PSSs). CMA CGM today announced an increase in its 40ft FAK rate of \$100, to \$2,300, effective 1 August, and has introduced a \$200 per teu PSS for July, which it is yet to extend into August.

Today’s Shanghai Containerized Freight Index (SCFI) recorded a 1.4% increase in the spot rate for North Europe, to \$920 per teu, which is 36% higher than for the same week of last year. Head of ocean freight EMEA at Flexport Martin Holst-Mikkelsen told *The Loadstar* today he saw “a similar demand trend” for the weeks ahead. “Utilisation is high across the services out of China, but the space situation has improved somewhat and we are seeing space available up to a week out,” he said.

In response to green shoots of demand, THE Alliance members Hapag-Lloyd, ONE, Yang Ming and HMM announced a weekly “extra loader” from Asia to North Europe, commencing with the sailing of the 6,350 teu *Hyundai Tacoma* stemmed for the week beginning 20 July. The extra loader, or sweeper, service is designed to mitigate the impact of THEA’s continued suspension of its FE4 loop. The second and third sailings will be by the 10,000 teu *Seaspan Zambezi* and *Seaspan Hudson*, with the fourth sailing subject to inducement. The service “is dependent on continued demand, given the still ongoing implications of Covid-19”, said a Hapag-Lloyd customer advisory.

Meanwhile, the SCFI commentary reported slot utilisation on ships sailing to the Mediterranean was “slightly lower” than the 95% achieved on North Europe voyages. In fact, the SCFI recorded a 2% fall in the spot rate this week, to \$951 per teu, although the rate is still around 30% higher than a year ago. As a consequence of the slight weakening on the tradelane, CMA CGM decided not to increase its FAK rate on the route from 1 August, maintaining its price for a 40ft at \$2,200.

On the transpacific, despite carriers reinstating some capacity, reports to *The Loadstar* suggest ships are still running full from Asia. “This demand surge is likely driven by many US businesses adding inventory that’s finally run down since their last orders in March or April,” said Freightos CMO Ethan Buchman. “Some of this demand in what may be an early peak season could be motivated by the August expiration of certain tariff exemptions for hundreds of products from coffee filters to skateboards,” said Mr Buchman.

Carriers on the route which have already successfully pushed through three GRIs are asking shippers to pay yet another increase from mid-August. Yesterday, Hapag-Lloyd announced a GRI of \$1,200 per 40ft from Asia to North America from 15 August. The carrier’s FAK rate was already hiked by \$1,500 per 40ft on 1 August, although it has cancelled its \$600 PSS introduced this month.

There is, however, some evidence that the freight rate bull run on the transpacific, which has seen rates to the US west coast spike 70% higher than a year ago, may be coming to an end. This week the SCFI recorded a 4.7% decline in the spot rate for the US west coast to \$2,783 per 40ft, and for east coast ports a 4.7% drop on the week, to \$3,297 per 40ft.

Source: <https://theloadstar.com/>

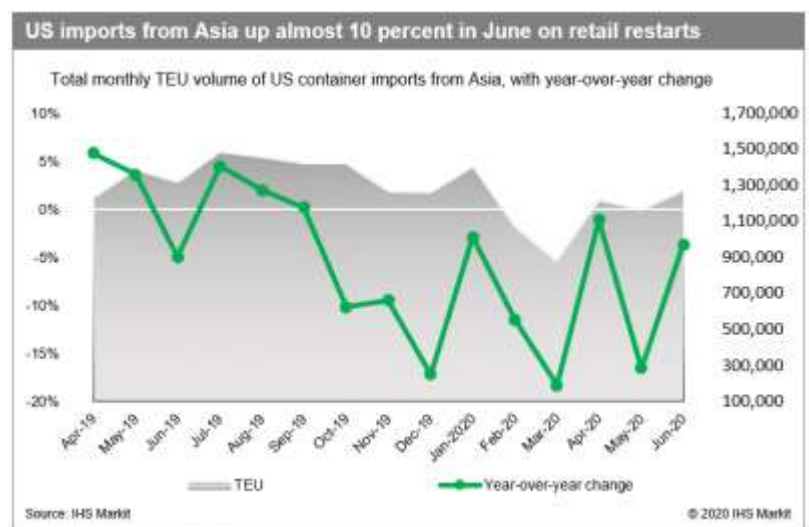
US store reopenings lift Asia imports in June

US imports from Asia increased to 1.27 million TEU in June, up 9.5 percent from May, reflecting the spurt in consumer demand generated by the reopenings of stores and restaurants in some states. Imports from China, meanwhile, totaled 855,722 TEU, up 13.8 percent from May, according to PIERS, a JOC.com sister company within IHS Markit.

Higher imports, coupled with 86 blank sailings in the trans-Pacific in May and June, sent spot rates from Asia spiking by more than \$1,000 per FEU to the West Coast and almost \$700 per FEU to the East Coast. However, the escalation of imports and spot rates in the largest US trade lane has likely peaked for now because some states that reopened their economies in May are considering new shutdowns as coronavirus disease 2019 (COVID-19) cases nationwide surged to over 3 million this week. This could dampen consumer purchases of back-to-school, Halloween, and possibly holiday season merchandise as retailers enter their busiest time of the year.

Year-over-year imports from Asia, especially China, remained in negative territory in June despite the month-on-month gain from May. US containerized imports from Asia declined 3.7 percent from June 2019, but that was a noticeable improvement from the 16.5-percent decline in May imports from May 2019, according to PIERS.

US June imports from China, while higher month on month, were down 0.9 percent from June 2019. Still, that was an improvement from the 16 percent decline in imports in May from May 2019. China continues to underperform the rest of Asia because of the two-year-old US-China trade war.



Aggressive capacity management pushes spot rates higher

Citing the canceled sailings in May and June that were reported this week by Sea-Intelligence Maritime Consulting, non-vessel operating common carriers (NVOs) say spot rates in the Asia-US trade reached a 10-year high because carriers reduced total capacity in the trade below demand. In the first week of July, spot rates were pushed higher by general rate increases (GRIs) as well as peak-season surcharges.

The West Coast spot rate from Shanghai last week was \$2,920 per FEU, up from \$1,724 per FEU on April 30, according to the Shanghai Containerized Freight Index that is published in the JOC Shipping & Logistics Pricing Hub. The East Coast rate was \$3,459 per FEU, up from \$2,773 on April 30.

The trend of US imports from Asia and China has been choppy in recent months as the economy recovers in fits and starts. Year-over-year imports from Asia declined 18.3 percent in March, 1.1 percent in April,

16.5 percent in May, and 3.7 percent in June, according to PIER. US imports from China declined 40.1 percent in March, 10.4 percent in April, and 16 percent in May before the slight dip in June.

The June import spike from Asia, which has extended into the first two weeks of July, was due to inventory replenishment by retailers, seasonal imports such as back-to-school merchandise, and continued strong movements of personal protective equipment and other medical supplies, according to NVOs. However, it appears that imports could pull back as early as next month if back-to-school sales disappoint and retailers are forced to shut down again.

Global Port Tracker, which is published monthly by the National Retail Federation and Hackett Associates, projected in its July edition that imports will decline 13.3 percent in August and 12.3 percent in September from the same months last year. But the forecast says the year-over-year declines will moderate to 9.9 percent in October and 0.6 percent in November.

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 3 July 2020	Current Index 10 July 2020
Comprehensive Index			1055.13	1033.58
Service Routes				
Europe (Base port)	USD/TEU	20%	907	920
Mediterranean (Base port)	USD/TEU	10%	970	951
USWC (Base port)	USD/FEU	20%	2920	2783
USEC (Base port)	USD/FEU	7.50%	3459	3297
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	595	638
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	1096	1076
East/West Africa (Lagos)	USD/TEU	2.50%	2736	2657
South Africa (Durban)	USD/TEU	2.50%	665	700
South America (Santos)	USD/TEU	5.00%	615	541
West Japan (Base port)	USD/TEU	5.00%	229	229
East Japan (Base port)	USD/TEU	5.00%	238	238
Southeast Asia (Singapore)	USD/TEU	7.50%	151	151
Korea (Pusan)	USD/TEU	2.50%	121	119

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