การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 49 พ.ศ. 2563

สรุปค่าระวางเรือประจำสัปดาห์

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	SIZE USD/20’	SIZE USD/40’	Low Sulphur Surcharge (LSS)	Remark
Thailand - Shanghai	250	600	Subject to ISOCC USD 17/TEU, USD 34/FEU	Effective till 14-Dec-2020
Thailand - Qingdao	350	750		
Thailand - Hong Kong	150	500		
Thailand - Japan (Main Port)	350	700		
Thailand - Kaohsiung	150	480		
Thailand - Klang	350	800	Subject to ISOCC USD 11/TEU, USD 23/FEU	
Thailand - Jakarta	450	900		
Thailand - Ho Chi Minh (Cat Lai)	120	400		
Thailand - Singapore	130	450		
Thailand - Manila (North & South)	350	750		
	Subject to CIC at destination			
Thailand - Jebel Ali	700	1,200	Subject to ISOCC USD 34/TEU, USD 68/FEU	
	Subject to War Risk Surcharge: USD 35/TEU, USD 70/FEU			
Thailand - South Korea (Busan)	100	200	USD 30/TEU, USD 60/FEU	Effective till 31-Dec-2020
Thailand - South Korea (Incheon)	100	200		
Thailand - Melbourne	1,350-1,450	2,700-2,850	-	
Thailand - Sydney	1,650-1,750	3,300-3,450		
Thailand – Durban / Cape Town	1,700	3,300	Subject to ISOCC USD 51/TEU, USD 102/FEU	Effective till 14-Dec-2020
	Subject to SCMC USD 30/BL			
Thailand – Europe (Main Port)	2,200	4,400	PSS: USD 200/TEU, USD 400/FEU INCL ISOCC: USD 53/TEU, USD 106/FEU	Effective 15-31-Dec-2020
	Subject to ENS USD30/BL			
Thailand - US West Coast	3,200	4,000	-	Effective till 14-Dec-2020
Thailand - US East Coast	3,800	4,700		
	Subject to Panama Low Water USD 30/Container			

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

สถานการณ์ค่าระวางในช่วงเดือนธันวาคม 2563 เนื่องจากขณะนี้พบปัญหาตู้ขาดแคลน สายเรือมีการปรับเพิ่มค่าระวางในเส้นทางเอเชีย 50 USD/TEU และ 200 USD/FEU โดยเส้นทาง Shanghai อัตราค่าระวางอยู่ที่ 250 USD/TEU และ 600 USD/FEU เส้นทาง Hong Kong ค่าระวางอยู่ที่ 150 USD/TEU และ 500 USD/FEU เส้นทาง Klang ค่าระวางอยู่ที่ 350 USD/TEU และ 800 USD/FEU และเส้นทาง Japan ค่าระวางอยู่ที่ 350 USD/TEU และ 700 USD/FEU สำหรับเส้นทางแอฟริกาใต้ ค่าระวางปรับเพิ่มขึ้น 200 USD/TEU และ 400 USD/FEU ทำให้ค่าระวางอยู่ที่ 1,700 USD/TEU 3,300 USD/FEU ซึ่งสถานการณ์ขณะนี้ในเส้นทางเอเชีย และแอฟริกาใต้สายเรือสามารถยืนยันราคาได้เพียงครึ่งเดือนแรกของธันวาคม โดยสถานะของการจองระวางต้องตรวจสอบสัปดาห์ต่อสัปดาห์ เนื่องจากสถานการณ์ตู้ขาดแคลน ทำให้อาจต้องมีการ Pending booking

ส่วนเส้นทาง Australia ท่าเรือ Melbourne และ Brisbane ค่าระวางปรับเพิ่มขึ้น 300 USD/TEU โดยเรียกเก็บอยู่ระหว่าง 1,350-1,450 USD/TEU และ 2,700-2,850 USD/FEU ส่วนท่าเรือ Sydney ค่าระวางปรับเพิ่มขึ้น 500 USD/TEU โดย

เรียกเก็บอยู่ระหว่าง 1,650-1,750 USD/TEU และ 3,300-3,450 USD/FEU สำหรับสถานการณ์ขณะนี้พบว่าสายเรือเริ่มสามารถรับจองระวางไปยังท่าเรือ Melbourne มากขึ้น ในขณะที่เส้นทาง Sydney และ Brisbane หากต้องการจองระวางผู้ส่งออกต้องตรวจสอบข้อมูลเพื่อเช็ค Space กับ Customer Service ของสายเรือที่ใช้บริการ

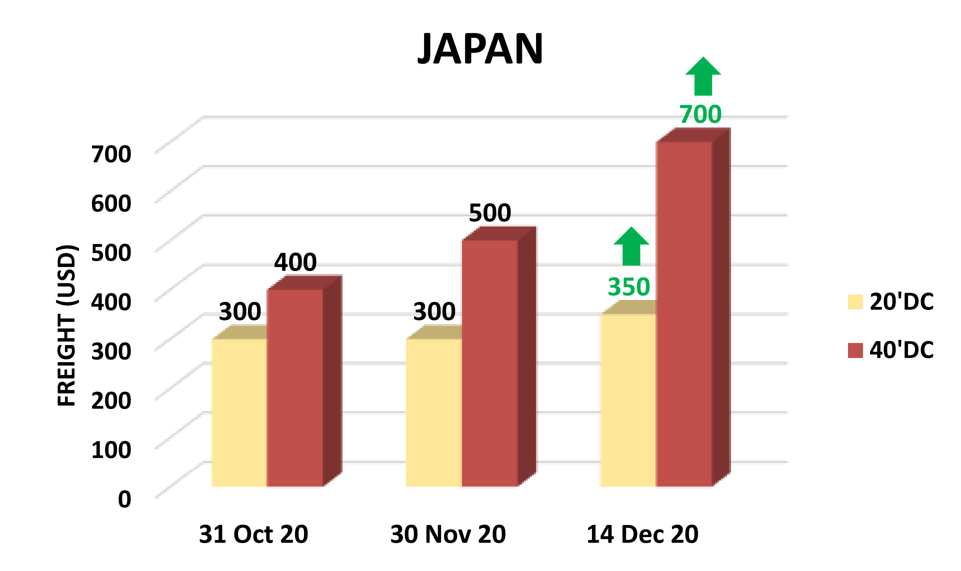
ในขณะที่ เส้นทาง Europe ค่าระวางมีการปรับเพิ่มสูงขึ้นเป็นเท่าตัว โดยปรับเพิ่มขึ้น 1,147 USD/TEU และ 2,447 USD/FEU ทำให้ค่าระวางอยู่ที่ 2,200 USD/TEU และ 4,400 USD/FEU โดยมีการเรียกเก็บค่า Peak Season Surcharge เพิ่มเติมในอัตรา 200 USD/TEU และ 400 USD/FEU แต่เนื่องจากตู้ขาดแคลน และพื้นที่ระวางในช่วงครึ่งเดือนแรกเต็ม ทำให้อาจสามารถรับ Booking ได้ช่วงสัปดาห์สุดท้ายของเดือนธันวาคม

ในขณะที่เส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนแรกของเดือนธันวาคม ค่าระวางยังคงที่ โดยค่าระวางฝั่ง West Coast อยู่ที่ 3,200 USD/TEU และ 4,000 USD/FEU และฝั่ง East Coast ค่าระวางอยู่ที่ 3,800 USD/TEU และ 4,700 USD/FEU ซึ่งขณะนี้ยังคงพบปัญหาเรื่องตู้ขาดแคลนเช่นเดียวกับเส้นทางอื่น รวมถึงปัญหาเรื่อง Port Congestion ในสหรัฐอเมริกา ทำให้สายเรืออาจมีการงดรับ Booking จนถึงสิ้นเดือนธันวาคม ทั้งนี้ อาจพิจารณาปล่อย Booking เป็นรายกรณีไป ดังนั้น โปรดตรวจสอบข้อมูลกับสายเรือ

CONTAINER FREIGHT RATE (REEFER)

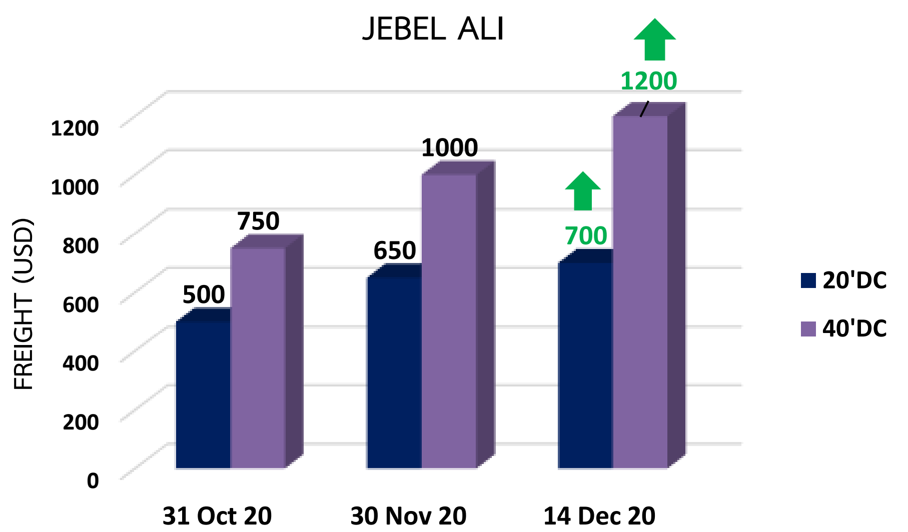
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20’	USD/40’		
Thailand-Hong Kong	900	1,000	USD 30/TEU, USD 55/FEU	Effective till 31-Dec-2020
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	1,000	1,400	-	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,800	2,500	OBS: USD 50/TEU, USD 100/FEU + PSS: USD 475/TEU, USD 950/FEU	Effective till 14-Dec-2020

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ญี่ปุ่น เดือน ต.ค. ถึง ธ.ค. ปี 2563



Subject to Low Sulphur Surcharge (Oct.-Dec): USD 17/TEU และ USD 34/FEU

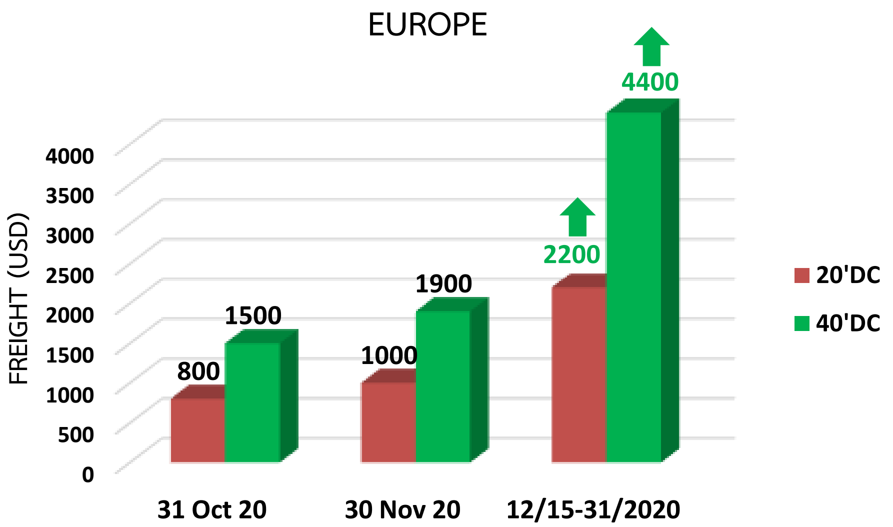
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-Jebel Ali เดือน ต.ค. ถึง ธ.ค. ปี 2563



Subject to

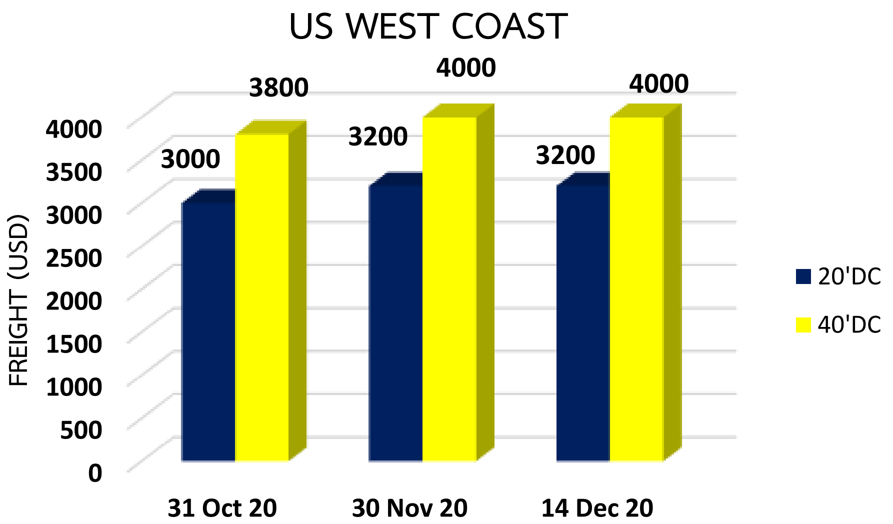
- War Risk Surcharge: USD35/TEU และ USD70/FEU
- Low Sulphur Surcharge (Oct.-Dec): USD34/TEU และ USD68/FEU

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน ต.ค. ถึง ธ.ค. ปี 2563

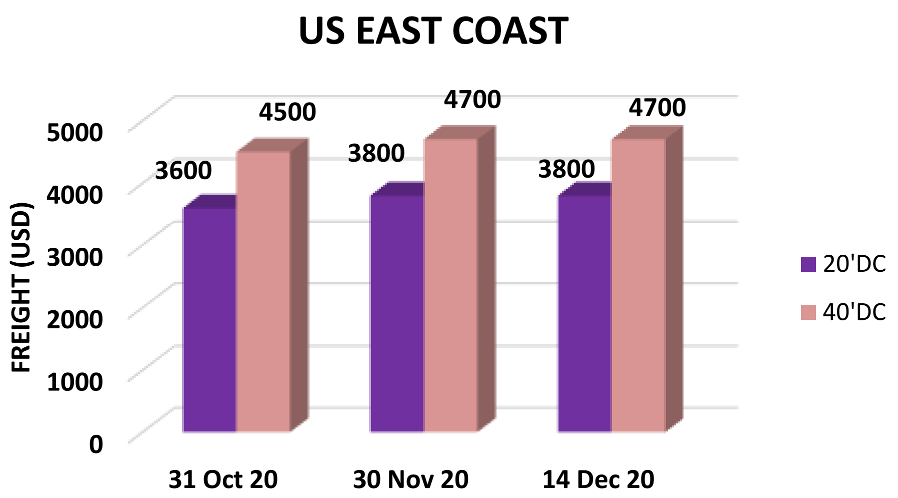


Included ISOCC (Sep.-Nov.): USD53/TEU และ USD106/FEU
Subject to
- ENS: USD30/BL
- PSS: USD 200/TEU และ USD 400/FEU

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



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



Subject to Panama Low Water Surcharge: USD 30/Container

➢ **รวบรวมประกาศสำคัญจากสายเรือ**

สายเรือ Hapag Lloyd

- ประกาศแจ้งปรับการเรียกเก็บค่า Local Service Fee สำหรับประเทศไทย โดยมีข้อมูลดังตาราง ซึ่งมีผลตั้งแต่วันที่ 1 มกราคม 2564

Charge Description	Charge Code	Currency	Charge Amount
Reefer : Terminal Handling Origin (to All trades)	THO	THB	3,530 per 20RF
	THO	THB	6,000 per 40&40HRF
Reefer : Terminal Handling Destination (from all trades)	THD	THB	3,530 per 20RF
	THD	THB	6,000 per 40&40HRF

- ประกาศขยายเวลาการเรียกเก็บค่า General Rate Increase (GRI) สำหรับสินค้าจากเส้นทางอาเซียนไปยังออสเตรเลีย โดยมีผลถึง มกราคม ปี 2564 ดังตาราง

Routing	General Rate Increase (GRI)
	Effective 1 Nov 20 - Jan 21
South East Asia to Australia	USD 150/TEU, USD 300/FEU

- ประกาศปรับการเรียกเก็บค่า General Rate Increase (GRI) สำหรับสินค้าจากเส้นทาง Far East ไปยังเสนทาง East Coast South America

Routing	General Rate Increase (GRI)	
To East Coast South America	Effective 8-Nov-2020	Effective 7-Dec-2020
	USD 300/Container	USD 550/Container

- ประกาศแจ้งเรียกเก็บค่า General Rate Restoration (GRR) สำหรับสินค้าที่นำเข้าไปยังประเทศไนจีเรีย โดยเรียกเก็บในอัตรา USD 400/ตู้ มีผลตั้งแต่วันที่ 1 ธันวาคม 2563
- ประกาศแจ้งเรียกเก็บค่า Peak Season Surcharge (PSS) จากเส้นทาง Far East ไปยัง North Europe และ Mediterranean โดยมีข้อมูลดังตาราง

Routing from Far East	Peak Season Surcharge (PSS) Dry & Reefer Container
	Effective 15-Dec-2020
To North Europe	USD 1000/TEU
To Mediterranean	

- ประกาศปรับการเรียกเก็บค่า Marine Fuel Recovery Surcharge (MFR) ในเส้นทางต่างๆ ดังนี้

Marine Fuel Recovery (MFR)		
Route	Effective 1-Jan-2021	
	(Dry Container) (USD/TEU)	(Reefer Container) (USD/TEU)
South America West Coast	210	303
Central America / Caribbean	178	262
South America East Coast	205	302
North America East Coast	190	276
North America West Coast	98	146
South Europe	154	237
North Europe	160	249
West Africa	216	311
South Africa	146	222
East Africa	135	192
Middle East	107	165
Indian Subcontinent	112	157
Intra East Asia	67	86
Oceania	128	173

- ประกาศแจ้งการงดรับจองระวางชั่วคราวสำหรับสินค้าประเภท Reefer Shipment ที่นำเข้าไปยังท่าเรือ Huangpu และท่าเรือ Tianjin (เฉพาะที่ Via Busan) ก่อนที่เข้าไปยัง Tianjin จนกว่าจะมีประกาศแจ้งเปลี่ยนแปลง

สายเรือ MSC

- ประกาศเรียกเก็บค่า Peak Season Surcharge (PSS) จากเส้นทาง UK, Ireland, N.Spain, Portugal และ Scanbaltic มายังเส้นทาง Far East โดยเรียกเก็บในอัตรา USD 500/20' และ USD 750/40' มีผลตั้งแต่วันที่ 1 ธันวาคม 2563

สายเรือ Zim Line

- ประกาศปรับการเรียกเก็บค่า New Bunker Factor (NBF) ระหว่างเส้นทาง Far East และเส้นทางต่างๆ ดังนี้

Routing	New Bunker Factor (NBF)
	Effective 1 -Jan- 2021
Far East to Mediterranean/Black Sea & Europe	USD 212/TEU

Mediterranean/Black Sea & Europe to Far East	USD 114/TEU

สายเรือ CNC

- ประกาศปรับการเรียกเก็บค่า Low Sulphur Surcharge (LSS) สำหรับสินค้าในเส้นทาง Intra-Asia โดยมีผลตั้งแต่ มกราคม 2564 โดยมีข้อมูลดังตาราง

LSS Short Distance

Container Type	Currency	20'	40'	40'HC
Dry	USD	10	20	20
Flat Rack/ Open Top/ Tank/ Other Special Equipment	USD	10	20	20
Refrigerated	USD	15	30	30

LSS Long Distance

Container Type	Currency	20'	40'	40'HC
Dry	USD	16	32	32
Flat Rack/ Open Top/ Tank/ Other Special Equipment	USD	16	32	32
Refrigerated	USD	24	48	48

CNC	JP	KR	NC	CC	TW	PRD	HK	PH	VN	TH	KH	SG	MY	BN	ID	MM	BD
JP		Short	Short	Short	Short	Short	Short	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long
KR	Short		Short	Short	Short	Short	Short	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long
NC	Short	Short		Short	Short	Short	Short	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long
CC	Short	Short	Short		Short	Short	Short	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long
TW	Short	Short	Short	Short		Short	Short	Short	Short	Long	Long	Long	Long	Long	Long	Long	Long
PRD	Short	Short	Short	Short	Short		Short	Short	Short	Long	Long	Long	Long	Long	Long	Long	Long
HK	Short	Short	Short	Short	Short	Short		Short	Short	Long	Long	Long	Long	Long	Long	Long	Long
PH	Long	Long	Long	Long	Short	Short	Short		Short	Long	Long	Long	Long	Long	Long	Long	Long
VN	Long	Long	Long	Long	Long	Short	Short	Short		Short	Short	Short	Short	Short	Short	Long	Long
TH	Long	Long	Long	Long	Long	Long	Long	Long	Short		Short	Short	Short	Short	Short	Long	Long
KH	Long	Long	Long	Long	Long	Long	Long	Long	Short	Short		Short	Short	Short	Short	Long	Long
SG	Long	Long	Long	Long	Long	Long	Long	Long	Short	Short	Short		Short	Short	Short	Long	Long
MY	Long	Long	Long	Long	Long	Long	Long	Long	Short	Short	Short	Short		Short	Short	Long	Long
BN	Long	Long	Long	Long	Long	Long	Long	Long	Short	Short	Short	Short	Short		Short	Long	Long
ID	Long	Long	Long	Long	Long	Long	Long	Long	Short	Short	Short	Short	Short	Short		Long	Long
MM	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long		Short
BD	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long	Long	Short	

Cargo owners bearing the costs of current container congestion

While shippers blame the ‘unwarranted power to the big three shipping alliances’, Drewry highlights multiple factors, including tight capacity management by carriers, unexpected demand, cost management by ports, ripple effects, and increased health measures. Cargo owners are bearing most of the cost burden of the current congestion crisis that is affecting multiple container ports around the world – including loss of business as well as additional costs – with the ports themselves unlikely to suffer any significant long-term consequences, according to analysis by Drewry.

Ankush Kathuria, Lead Analyst at Drewry Maritime Financial Research, highlighted that shippers “generally bear the burden of inefficiencies within the supply chain”, noting that when they are aware of the inefficiency, they are better prepared. “But for inefficiencies caused by disruption – such as COVID-19 – shippers have to bear the indirect cost as well, such as loss of business due to late delivery and increased stock holding”, caused by longer or less-reliable service lead times. Those indirect costs come in addition to container shipping lines passing on the cost of delays to shippers by adding a congestion surcharge to freight rates, while ports and hauliers pass on the cost in the form of higher demurrage charges and storage cost, he notes.

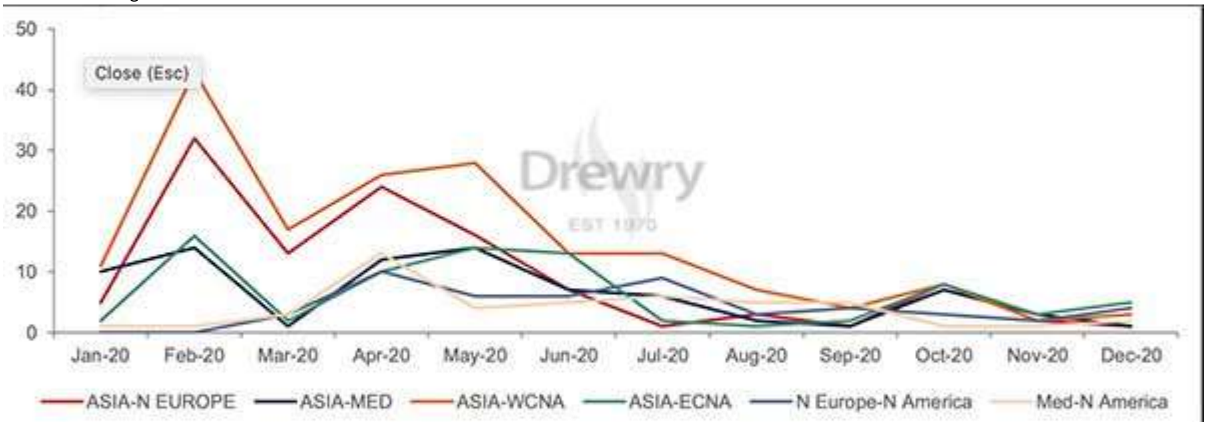
As for the causes, he indicates that there is a complex series of inter-connected reasons,m although each industry segment has its own justification or explantion of the causes. “Shippers contest that the recent consolidation in the shipping industry has given unwarranted power to the big three shipping alliances, which virtually dominate 85% of the market share. Their respective capacity management efforts have led to the recent spike in container freight rates, which has stirred the regulators in many countries to closely watch the situation,” noted Kathuria.

Recently, the US Federal Maritime Commission (FMC) has intensified monitoring of shipping alliances, requiring them to provide carrier-specific trade data monthly rather than quarterly. This comes in conjunction with the regulators in South Korea and China, “which are already keeping an eagle eye on the situation”, Kathuria highlighted.

However, shipping lines claim that a number of factors have been involved, including rerouting or cancelling of port calls that have led by increased time to complete the round trip – in part due to quarantine measures opted by various ports worldwide. And while “the technique of positioning containers based on historical trends and future projections across ports works in the normal course, it has failed in the current stressed situation”, Kathuria noted.

“Ports, on the other hand, claim that with easing lockdown measures, volumes have picked up suddenly and they are doing their best to deal with the situation. While they believe it is a short-term phenomenon and expect normalcy to return soon, some ports have opted to increase their workforce, while others have introduced overtime to deal with the situation. “Additionally, the capacity of inland transport and warehousing providers in each market is broadly fixed, and therefore, cannot be easily ramped-up to meet short-term fluctuations in demand.”

Blank sailings



What is driving congestion?

Drilling down further into what is driving congestion, Kathuria highlighted multiple reasons, including: tight capacity management and increased blank sailings by carriers; unexpected increase in demand; cost management tactics adopted by ports to combat the impact of COVID -19; ripple effect of congestions at nearby ports; and increased health measures adopted to safeguard against COVID-19 infections.

On the unexpected increase in demand, he notes three key factors including: the sudden spike in container volumes to meet the higher demand following the reopening of economies after lockdowns; the usual pick-up in demand before the holiday season; and front loading of orders by importers to safeguard themselves from any supply chain disruption that could be triggered by a second wave of infections – which has already become a reality in some parts of the world. This latter factor had particularly led to congestion at US ports such as Los Angeles and Long Beach.

"Ports are generally characterised by fixed capacity which cannot be changed or modified to meet the short-term requirements," he noted. Kathuria highlighted the situation of Felixstowe in the UK as an example of container ports deploying cost management strategies to save the bottom line from the COVID-19-led decline in revenue, noting that "these strategies have resulted in unwarranted consequences once the operating environment improved. In Felixstowe, the decision to let go the contract workers to lower the cost has left the port underprepared for a steep recovery in volumes that started in 3Q20 and has resulted in the current congestion at the port.

Ripple effect

The UK also provides an example of the "ripple effect of congestions at nearby ports", with Kathuria noting that "the heavy congestion at Felixstowe has not only overburdened other ports in the UK (Southampton) but also ports of northern Europe (Rotterdam and Zeebrugge) as carriers have stopped calling Felixstowe and are instead unloading containers at nearby ports". Meanwhile, he noted that increased health measures adopted to safeguard against COVID-19 infections had also been a factor, highlighting several ports in China facing congestion as the country mandated COVID-19 checks, primarily to stop the spread of the infection.

Congestion at Colombo was also related to the impact of COVID-19 infections on resources. On the effects more generally, he described congestion as a short-term problem with limited impact on the port industry's valuation. He noted: "Supply chains generally tend to be well orchestrated for moving goods across global networks. Any short-term disruption can lead to bottlenecks as is the case with port congestion these days. Port congestions are not new to the industry and have been handled in the past as well. Since ports are gateways for global trade, any bottleneck at ports will have a ripple effect across the maritime supply chain." In the impact on the port companies' valuation, he noted:

"Port congestions are not new and have already been tackled in the past. They impact trade in the short term even though their wider impact can be felt by various industries. Therefore, we believe the current crises is also short term and should be resolved soon with limited impact on valuations. The recent uptrend in Drewry's port index substantiates our claim."

Stock price recovery

Indeed, Drewry's port index indicates that the average stock price of ten port companies covered by Drewry has recovered to close to 90% of their value at the start of 2020. Kathuria added: "Also, financial markets are already enjoying the flood of liquidity injected by the central bankers/governments, which instead of supporting the real economy, is actually making its way into various financial assets. We believe liquidity will continue to support the Port company valuations at least until the vaccines are fully available and governments continue to pump money into their respective economies."

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

Container shortages exacerbated by slow turnaround times

Containers are desperately needed in export markets but are being held up in depots, where port congestion is causing empties to sit idle for up to two months. Container availability in China remains at a record low as the length of time equipment is sitting in depots is increasing. A study the Fraunhofer Center for Maritime Logistics and Services and container repositioning service Container xChange found that equipment was sitting empty for 45 days on average, despite the high levels of demand.

In regions with low container availability, such as China and the US, the average rose to 61 days and 66 days, respectively. “Container availability across China is still at a record-low, while US ports are overwhelmed by a surge of shipping containers from Asia, full of products retailers are eager to get on shelves for the holidays,” Container xChange said. The number of available empty containers at Asian ports fell as more containers made their way to the US. Overloaded US ports slowed down container turnaround time, further exacerbating the problem, contributing to rising prices and further delays for US importers.

“China to US west coast container shipping costs climbed 135% from $1,648 per feu at the end of May to $3,850 per feu by mid-September,” it said. “Over the same period, container availability in Asia, as measured by the Container xChange Index, fell by 37% to a severe shortage of 0.17, nearly 50% lower than September 2019.” Efforts by Chinese regulators to lobby carriers to refrain from raising freight rates on the transpacific trade had put a cap on rates to the US, it added, but the continued shortage of equipment had just led to rates surging on other trades.

Some efforts have been made to return more containers to export markets in Asia, with BIMCO reporting that a record 325,980 empty containers were shipped from Los Angeles in October. For US exporters, this too was causing problems, as carriers were prioritising the fast turnaround of empties over sending export containers, in order to capitalise on the strong headhaul freight rates. But those strong rates are creeping into other trades. “As empty containers are prioritised for the more lucrative transpacific lane, fewer containers are available on other lanes,” said Container xChange. “This capacity shortage contributed to rates from Asia to North Europe spiking 30% in November to $2,772 per feu, up 86% year on year.”

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

Supply chains need more resilience, but shippers in no rush to re-evaluate

The Covid-19 pandemic has been widely described as a wake-up call for shippers and consignees to re-evaluate supply chains exposed as vulnerable. The disruption has put supply chain risk in the spotlight, reinforcing concerns raised by earlier cataclysmic events, like severe flooding in Japan and Thailand. Among voices extolling the need for more resilience – even at the cost of higher spend on production – has been the Council of Supply Chain Management Professionals (CSCMP).

The organisation’s *State of Logistics* report in June said: “The pendulum that once swung toward ultra-efficient, single-source, just-in-time and heavily cost-focused supply chains will swing back in favour of flexibility and reserve capacity to cope with uncertainty and risk.” Some manufacturers appear to have taken this thinking to heart.

A report last month, *Accelerating Trends: Assessing the Supply Chain in a Post-pandemic World* by law firm Foley & Lardner, found that nearly three-quarters of manufacturers were envisaging a change of direction that lowers the emphasis on low cost and lean inventory. Of some 150 respondents, 70% said they expected such a shift and 62% signalled that the focus on JIT models would also be on the wane. However, logistics professionals hear a somewhat different tune from their clients. Bob Imbriani, senior VP international at forwarder Team Worldwide, reported that his company had not had a lot of discussions with importers or exporters on rejigging supply chains, or changing routings to bolster resilience.

For the most part, he says, Team’s customers have their hands full with the day-to-day management of their traffic, adding: “Shippers are very much focused on the here and now, on the immediate movement of cargo.” And Albert Saphir, principal of ABS Consulting, has not encountered much desire among his clients to discuss how to make their supply chains more resilient. Nor does he see the focus on cost being superseded by heightened attention to supply chain risk. Nevertheless, both he and Mr Imbriani expect to see some movement in the near future. “I don’t see a real sense of urgency today, but some companies are looking ahead,” said Mr Imbriani. “Everyone realises that supply chain reliability is extremely important.”

Diversification of suppliers and sourcing locations, which is central to this trend, has already been going on, notably in the geographical arena with the migration of production out of China. Electronics manufacturers have been doing this to a degree, but the momentum should pick up as companies look to do more of this, Mr Saphir said. Among those clients that are looking ahead, Team has registered growing interest in near-shoring. The US and Canada figure in some of these considerations, but Mexico and Central America appear to be getting a lot of traction. “There has been a shift to Central American countries, for example, Costa Rica. Companies have started moving operations there,” Mr Imbriani reported.

These deliberations are not only fuelled by concerns over supply chain vulnerability. US trade policies and the rising cost of sourcing from China have also been factors, according to Mr Imbriani. Still, the worries about supply chains are mounting – not only in terms of disruptive events, but also in broader terms of securing sufficient capacity. “There is a continued concern,” Mr Imbriani noted. The rebound in airline passenger numbers has been less robust than anticipated, so the lack of bellyhold capacity stands to last for some time to come, and “people are concerned about that”, he said.

Moreover, rapid growth in e-commerce threatens to absorb a large chunk of available airfreight capacity, raising further questions for shippers on whether there will be sufficient lift available for them – and at what prices, he added. The last point has some bearing on the balancing act between cost and supply chain resilience. Mr Imbriani pointed out that the initial cost advantage of offshore production in China had already eroded to some extent. Rising transport costs can go some way further to levelling the gap with the production costs of near-shoring. “There may not be such a big difference in a shift,” he said. “It really comes down to total landed cost. Some costs have gone up 20%, 30%, 40% in the past few years.

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 27 November 2020	Current Index 4 December 2020
Comprehensive Index			2048.27	2129.26
Service Routes				
Europe (Base port)	USD/TEU	20%	2091	2374
Mediterranean (Base port)	USD/TEU	10%	2219	2384
USWC (Base port)	USD/FEU	20%	3880	3947
USEC (Base port)	USD/FEU	7.50%	4708	4700
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	1412	1402
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	2430	2490
East/West Africa (Lagos)	USD/TEU	2.50%	4549	4588
South Africa (Durban)	USD/TEU	2.50%	1818	1996
South America (Santos)	USD/TEU	5.00%	4805	5225
West Japan (Base port)	USD/TEU	5.00%	250	251
East Japan (Base port)	USD/TEU	5.00%	253	253
Southeast Asia (Singapore)	USD/TEU	7.50%	776	775
Korea (Pusan)	USD/TEU	2.50%	197	197

....