

การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 36 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 30-Sep-2020
Thailand - Qingdao	300	450		
Thailand - Hong Kong	100	200		
Thailand - Japan (Main Port)	300	400		
Thailand - Kaohsiung	100	180		
Thailand - Klang	300	500		
Thailand - Jakarta	400	600	Subject to ISOCC USD 11/TEU, USD 23/FEU	
Thailand - Ho Chi Minh (Cat Lai)	70	100		
Thailand - Singapore	80	150		
Thailand - Manila (North & South)	300	450		
	Subject to CIC at destination			
Thailand - Jebel Ali	500	750		
	Subject to War Risk Surcharge: USD 35/TEU, USD 70/FEU		Subject to ISOCC USD 34/TEU, USD 68/FEU	
Thailand - South Korea (Busan)	80-100	160-200		
Thailand - South Korea (Incheon)	100	200	-	
Thailand - Melbourne	675-775	1,350-1,500	FAF: USD 6/TEU, USD 12/FEU	
Thailand - Durban / Cape Town	800	1,300	Subject to ISOCC USD 51/TEU, USD 102/FEU	
	Subject to SCMC USD 30/BL			
Thailand - Europe (Main Port)	850	1,600	ISOCC: USD 53/TEU, USD106/FEU PSS: USD 150/TEU (Negotiable)	
	Subject to ENS USD30/BL			
Thailand - US West Coast	3,000	3,800	-	Effective till 14-Sep-2020
	3,600	4,500		
Thailand - US East Coast	Subject to Panama Low Water USD 30/Container			

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

สถานการณ์ค่าระวางในช่วงเดือนกันยายน 2563 อัตราค่าระวางในเส้นทางเอเชียส่วนใหญ่คงที่ แต่มีการปรับเพิ่มค่า Low Sulphur Surcharge เล็กน้อยในบางสายเรือ 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

ส่วนเส้นทางที่ค่าระวางปรับลดลง ได้แก่ เส้นทางเกาหลี โดยเส้นทาง Busan ค่าระวางอยู่ที่ 80-100 USD/TEU และ 160-200 USD/FEU เส้นทาง Inchoen ค่าระวางลดลง 50 USD/TEU ทำให้ค่าระวางอยู่ที่ 100 USD/TEU และ 200 USD /FEU และเส้นทางแอฟริกาใต้ ค่าระวางปรับลดลง USD 50/TEU และ USD 300/FEU ค่าระวางอยู่ที่ 800 USD/TEU 1,300 USD/FEU

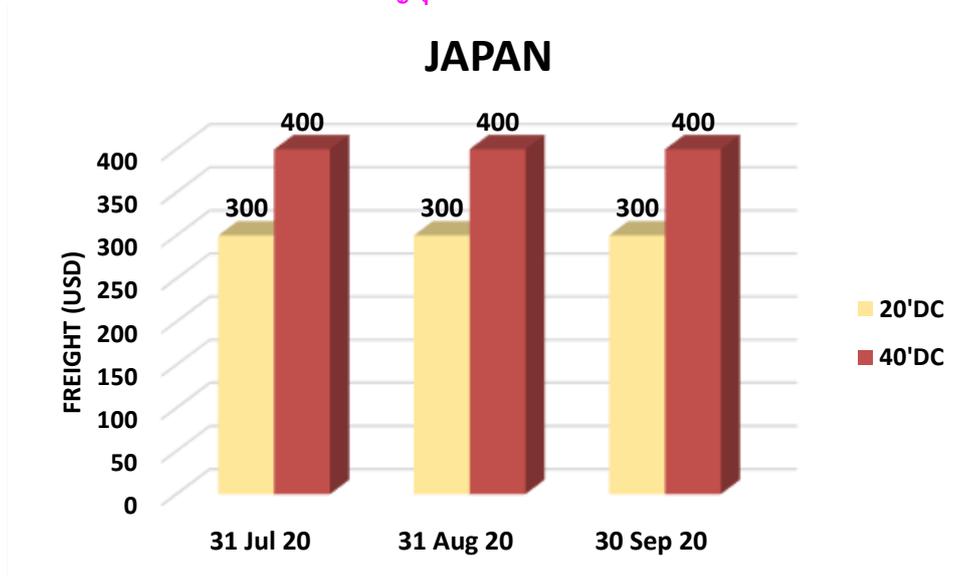
ส่วนเส้นทางที่ค่าระวางปรับเพิ่มขึ้น ได้แก่ เส้นทาง Australia ค่าระวางปรับเพิ่มขึ้น 50 USD/TEU โดยเรียกเก็บอยู่ระหว่าง 675-775 USD/TEU และ 1,350-1,500 USD/FEU และเรียกเก็บค่า FAF ในอัตรา 6 USD/TEU ในขณะที่เส้นทาง Europe มีการปรับเพิ่มการเรียกเก็บค่า Peak Season Surcharge (PSS) ในอัตรา 150 USD/TEU (ซึ่งสามารถเจรจาต่อรองได้) เพิ่มเติมจากค่าระวางเดิมที่อยู่ที่ 850 USD/TEU และ 1,600 USD/FEU และเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนแรกของเดือน

กัญยายน ค่าระวางฝั่ง West Coast ปรับเพิ่มขึ้น 300 USD/TEU และ 400 USD/FEU ทำให้ค่าระวาง อยู่ที่ 3,000 USD/TEU และ 3,800 USD/FEU ในขณะที่ฝั่ง East Coast ค่าระวางปรับเพิ่มขึ้น 500 USD/TEU และ 600 USD/FEU ทำให้ค่าระวางอยู่ที่ 3,600 USD/TEU และ 4,500 USD/FEU ซึ่งขณะนี้พบว่า Space เรือจากไทยไปยังเส้นทางทรานส์แปซิฟิกยังคงค่อนข้างแน่น โดยเฉพาะอย่างยิ่งทางฝั่ง East Coast เนื่องจาก Space Allocation ถูกจัดสรรไปยังประเทศจีน และเวียดนาม เพราะมีปริมาณ การส่งออกจำนวนมาก

CONTAINER FREIGHT RATE (REEFER)

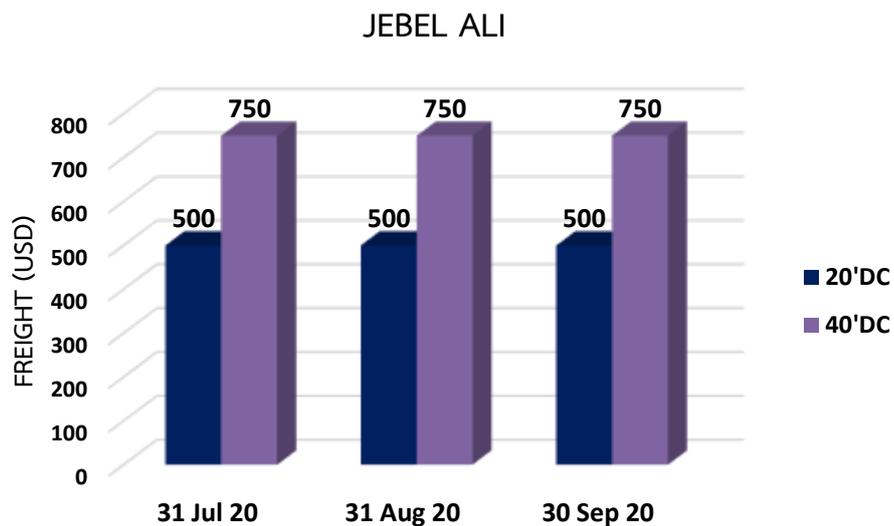
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	700	800	USD 30/TEU, USD 55/FEU	Effective till 30-Sep-2020
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	900	1,200	-	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,500-1,550	1,900-2,000	USD 14/TEU, USD 28/FEU	

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



Subject to Low Sulphur Surcharge (July): USD 17/TEU และ USD 34/FEU
(Aug.): USD 9/TEU และ USD 17/FEU
(Sep.): USD 17/TEU และ USD 34/FEU

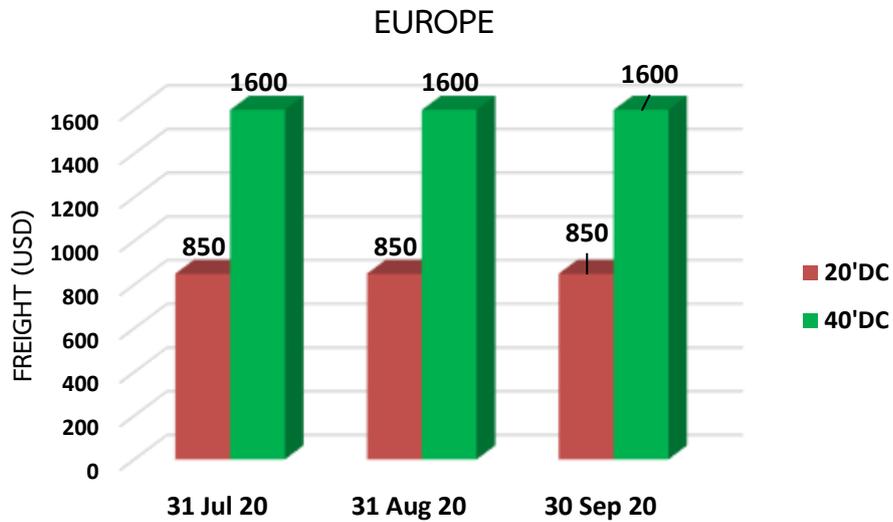
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-Jebel Ali** เดือน ก.ค. ถึง ก.ย. ปี 2563



Subject to

- War Risk Surcharge: USD35/TEU และ USD70/FEU
- Low Sulphur Surcharge (July & Aug.): USD23/TEU และ USD46/FEU
(Sep.): USD34/TEU และ USD68/FEU

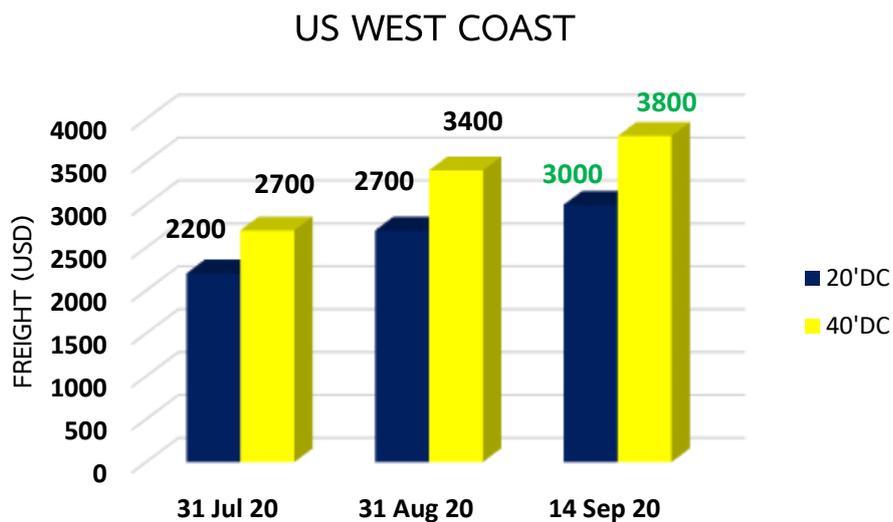
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน ก.ค. ถึง ก.ย. ปี 2563



Subject to

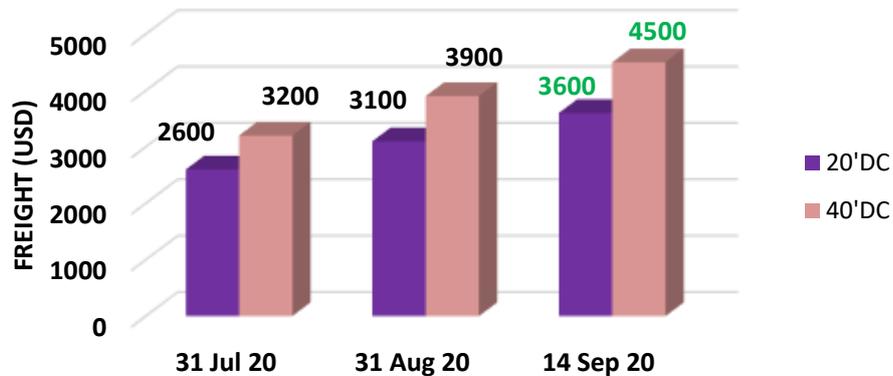
- ENS: USD30/BL
- ISOCC (July - Sep.): USD53/TEU และ USD106/FEU
- PSS (Sep.): USD150/TEU และ USD 300/FEU

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



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

US EAST COAST



Subject to Panama Low Water Surcharge: USD 30/Container

➤ รวบรวมประกาศสำคัญจากสายเรือ

สายเรือ MSC

- ประกาศเรียกเก็บค่า Container Compliance Charge (CCC) ในอัตรา USD 8/TEU และ USD 16/FEU & 45' สำหรับสินค้าที่เป็น Dry Container นำเข้าไปยังสหรัฐอเมริกา ซึ่งค่า CCC เป็นค่าใช้จ่ายในการตรวจสอบตู้ให้อยู่ในสภาพพร้อมใช้งาน รวมถึงการซ่อมตู้ในวงเงินไม่เกิน USD 500/ตู้ แต่หากค่าซ่อมตู้สูงกว่า USD 500/ตู้ เจ้าของสินค้าต้องจ่ายส่วนต่างตาม Invoice บวกกับ USD 500 โดยมีผลตั้งแต่วันที่ 1 ตุลาคม 2563

สายเรือ Hapag Lloyd

- ประกาศปรับการเรียกเก็บค่า Export Stuffing Charge (STF) สำหรับประเทศไทย โดยเรียกเก็บในอัตรา 4,215 บาท/20', 7,130 บาท/40' และ 8,020 บาท/40'HQ มีผลตั้งแต่วันที่ 1 ตุลาคม 2563
- ประกาศปรับการเรียกเก็บค่า Marine Fuel Recovery (MFR) สำหรับสินค้าจาก East Asia รวมถึงประเทศไทย ไปยังเส้นทางต่างๆ ดังตาราง

Marine Fuel Recovery (MFR)		
Route	Effective 1-Oct-2020	
	(Dry Container) (USD/TEU)	(Reefer Container) (USD/TEU)
South America West Coast	202	292
Central America / Caribbean	171	252
South America East Coast	197	291
North America East Coast	184	268
North America West Coast	95	142
South Europe	148	228
North Europe	155	241
West Africa	208	299
South Africa	141	214
East Africa	130	185

Middle East	103	158
Indian Subcontinent	108	151
Intra East Asia	65	83
Oceania	123	167

- ประกาศเรียกเก็บค่า General Rate Increase สำหรับสินค้าจากเส้นทาง South East Asia ไปยังออสเตรเลีย รายละเอียดดังตาราง

Routing	General Rate Increase (GRI)	
	Effective 1-Oct-2020	
South East Asia to Australia	USD 150/TEU	USD 300/FEU

Container shippers face higher contract rates

Capacity discipline has pushed up spot freight rates but contract rates have been trending downward. Higher spot rates could see contract rates rise in the months ahead. Rising spot rates on key headhaul and backhaul trades due to pandemic-driven capacity management could lead to higher contract rates for shippers, according to analysts at Drewry.

“Following the surge in spot ocean freight rates on most lanes since the start of the coronavirus crisis, and proactive management of shipping capacity by the major lines, it now seems likely that a significant number of contract shippers will see increases in their newly negotiated 2021 freight rates,” Drewry said

Spot rates on most routes are very high and Drewry expects them to remain high for months, thus creating upwards pressure on contract rates. “We can clearly see that 2020 spot rates have exceeded 2019 spot rates by a large margin since March. The Global Freight Rate Index, a weighted average of all-in spot rates on east-west, north-south and intra-regional trades, reached \$2,276/40ft container in August, a 32% increase from August 2019.” While there had been some regional variations, key trade lanes such as the transpacific and Asia-Europe backhaul had seen “worryingly high” increases.

“Particularly this year, shippers and forwarders should track the development of spot freight rates because they indicate the tightness of the market on some routes,” Drewry said. “They may be a leading indicator of contract rates, and they could point to future problems of capacity availability if ocean carriers prioritise higher spot cargoes over lower-rated, less profitable contract cargoes.” While contract rates had not increased to date, second-quarter carrier result demonstrated that average freight rates were on the increase. Maersk, Hapag-Lloyd, OOCL and Zim all reported increases of between 4.5% and 7.9% in their average spot and contract freight rates between the second quarters of 2019 and 2020.

Drewry data indicates that the trend in contract rates has been downward since May, but it warned that there was no guarantee that this trend would continue. “This is the difficult question which shippers, forwarders and ocean carriers now face,” Drewry said.

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

Container shortages in Asia expected to intensify

Equipment shortages in Asia are worsening as importers in the United States and Europe struggle to return empty containers to China and other Asian manufacturing hubs, casting doubt as to whether the international supply chain will be ready for the upcoming peak shipping season. The container imbalance has been caused primarily by the spike in imports to the US and Europe in July and August following the reopening of their economies following lockdowns put in place in the early days of the coronavirus disease 2019 (COVID-

19). Now, carriers are having difficulties repositioning the empty containers for return to load ports in Asia, especially China, according to carriers and non-vessel operating common carriers (NVOs).

Containers of all sizes — 20-foot, 40-foot, and 40-foot high-cube — are in short supply. Jon Monroe, a consultant to NVOs, listed in his weekly newsletter Wednesday nine load ports in China that are short on containers to various degrees. As a result, exporters in China are grabbing whatever containers they can, even if it means downsizing to containers that carry less freight at a higher cost to beneficial cargo owners (BCOs), he said.

“There are plenty of reports out there that a lot of equipment — I mean, I’m not talking for Maersk, but for the industry, if you will — has been stuck in Europe and the US and other importing regions and is slow in finding its way back to Asia,” Maersk CEO Søren Skou said on the company’s Q2 earnings call on Aug. 19. In addition, typhoons and fog are throwing vessels off schedule in China, South Korea, and Japan, in some cases resulting in liner services skipping port calls to avoid weather issues and not dropping off empties, thereby contributing to the shortages. “There are a multitude of reasons [for the container shortages]: a trade imbalance from Europe and the US to Asia, bad weather, and a cargo rush ahead of the weeklong shutdown for China’s National Day holiday,” said Sundara, director of ocean freight for Asia Pacific at Scan Global Logistics.

Shortages ‘only going to get worse’

NVOs do not see the container shortages in Asia dissipating any time soon. “The equipment shortage is massive, and it’s only going to get worse,” said David Bennett, president of the Americas at the NVO Globe Express Services. Bennett sees the strong demand in the US for e-commerce merchandise and medical supplies, such as personal protective equipment, lasting into October, and probably beyond that.

In the US, warehouses, especially those in Southern California, have been overwhelmed by imports over the past two months. Productivity at the import warehouses is down as employers space out workers for safety reasons. Also, logistics companies report a shortage of workers at the warehouses due to COVID-19. As a result, containers, and the chassis they sit on, are remaining at warehouses much longer than they normally would.

To alleviate this problem, ocean carriers, who for years had been granting extended free time for equipment storage to retailers and other large customers in order to retain their business, are now cutting back on free time, according to NVOs. While carriers continue to honor the traditional three or four days of free storage time, customers, even large retailers and importers that had been given 20 days or more of additional free time, are seeing those times reduced dramatically, according to one NVO who requested anonymity, James Caradonna, general manager pricing/Americas at M&R Forwarding and Multi Container Line, said that when customers request extended free time now, the NVO is in a position where it has to explain to the consignee some carriers are now backtracking from free-time extensions.

NVOs are now telling their BCO customers the answer is “no” because carriers want the equipment back in Asia as quickly as possible, Caradonna said. The ability of carriers to cut back on free time reflects the leverage carriers now have in a market where space and equipment are at a premium, he said. “If a carrier were compelled to extend a longer free period to a shipper due to competitive dynamics, they are less compelled today,” said Caradonna.

A source within the Los Angeles-Long Beach port complex who asked not to be identified said if carriers resist requests from BCOs for free-time extensions beyond the normal three or four days, the entire supply chain will benefit. When large BCOs negotiate with carriers for extended free time, which is common in Los Angeles-Long Beach, the ports have said over the years it contributes to container and chassis shortages during high-volume periods such as during the peak shipping season.

“It’s gotten to the point where we have to say [to the BCOs], ‘You are part of the problem,’” he said. Importers in Southern California’s Inland Empire face the challenge of finding enough truck capacity to return empty containers to the ports, said Weston LaBar, CEO of the Harbor Trucking Association (HTA). The problem is compounded by the difficulty truckers are facing in securing appointments for the return of empties to the marine terminals, he said.

Logistics companies say demand for empty returns is a big problem. “It’s becoming increasingly harder to pre-appoint empty container returns for retailers,” said Brian Kempisty, founder of Port X Logistics. “Now, it can take two to three days to get an appointment, largely because plenty of slots are booked but not used.” Due to their inability to get appointment slots for empty returns, LaBar said some truckers are booking multiple slots when they can, but are not canceling the slots they don’t use. He said the HTA is working with terminal operators to correct this problem.

Importers paying extra to secure equipment, vessel space

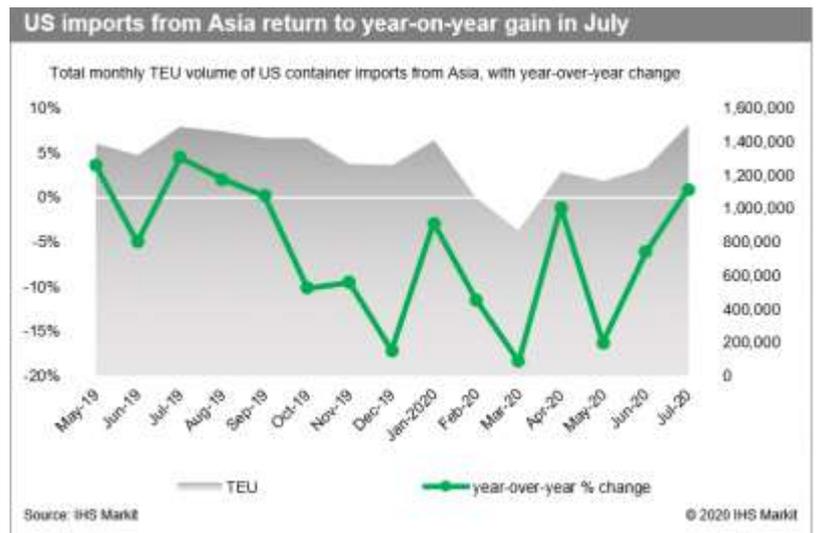
The logistics problems in Asia and Southern California are pushing up the delivered cost of imports in the US. Customers who are desperate to obtain containers and secure space on vessels leaving Asian ports are willing to pay hefty surcharges on top of record-high spot rates for ocean voyage. Shippers are paying surcharges to guarantee receipt of equipment and to secure slots on vessels at the Chinese ports. Carriers are also charging additional fees to guarantee priority unloading at US ports and delivery to railroads and truckers. Carriers each have their own name for these guaranteed programs, and according to a spreadsheet provided by an NVO who asked not to be identified, the individual surcharges for these guarantees range from \$300 to \$1,950 per container, on top of record-high spot ocean rates from load ports in China to the US East and West coasts.

Pricing from Asia to the US West Coast reached \$3,758 per FEU on Friday, up 3.3 percent from last week and 140 percent from the same week a year ago, according to the Shanghai Containerized Freight Index (SCFI), which is published in the JOC Shipping and Logistics Pricing Hub. The Asia-US East Coast rate hit \$4,538 per FEU, up 7.9 percent sequentially and 72.5 percent year over year. Carriers are in such desperate need of containers in China that some lines are refusing to accept bookings to India and other Asian locations, said Alan Baer, president of NVO TTS Worldwide. “They want to get the containers to China,” he said.

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

More blanked sailings and volume volatility – ‘that is simply the new norm’

Container terminals should “get used to blanked sailings and volume volatility”, while shifting trade flows could benefit hub ports over gateways. According to Lars Jensen, CEO of SeaIntelligence Consulting, liner



industry consolidation has been “phenomenal” in allowing carriers to manage capacity through blanked sailings, with the bumper profits seen in Q2 likely to ensure the frequent withdrawal of capacity becomes a mainstay. “Ports and terminals have to get used to a market with increased usage of blanked sailings – that is simply the new norm,” Mr Jensen said at the Container xChange Digital Container Summit. And, assessing the long-term shipping trends from the Covid-19 crisis, Mr Jensen said ports would also need to grapple with increased volume volatility.

“The short-term inventory-impact on demand is substantial,” he explained. “The large growth in container volumes, especially on the transpacific now, is to a significant degree, very likely driven by inventory needs, which means the effect will be temporary and we are going to see a high degree of volume volatility.” Mr Jensen said the success of consolidation among major carriers operating on the deepsea trades would likely trigger an additional wave of mergers and acquisition activity among niche and regional players. “You still have very fragmented intra-regional markets in Asia, Europe and the Americas, so what is very likely to unfold over the next five years is another consolidation round, this time among intra-regional carriers – although it’s questionable to what degree the major global carriers will play a part.”

Nevertheless, he said, ports and terminals would face a market in which carriers were more flexible in their transshipment patterns, and could “more quickly shift volumes around.” Volumes are also shifting as a result of the trade war and the current rush to diversify supply chains. Mr Jensen said this would provide opportunities for some shipping lines and ports, because, for example, there were many fewer US imports from China, but the overall quantity did not decline. “The only thing that happened is that these goods were shipped from Vietnam, Indonesia, the Philippines, etc, but they still get on a transpacific vessel. It’s an opportunity for other ports in other countries, and you see an uptick in feeder services, as trade tends to be more dispersed, rather than flowing between a few individual large port pairs.”

Indeed, according to terminal operator PSA, hub-and-spoke transshipment ports have “performed better” than gateways. Head of group business development Wan Chee Foong said: “The demand and supply shocks have certainly been disruptive, but there is a silver lining – it has reinforced the importance of hub ports, which, in general, have performed better than gateway ports. “They have been especially critical in keeping global trade and supply chains connected and moving during the pandemic.”

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 28 August 2020	Current Index 4 September 2020
Comprehensive Index			1263.26	1320.8
Service Routes				
Europe (Base port)	USD/TEU	20%	1029	1042
Mediterranean (Base port)	USD/TEU	10%	1060	1082
USWC (Base port)	USD/FEU	20%	3639	3758
USEC (Base port)	USD/FEU	7.50%	4207	4538
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	837	909
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	1213	1250
East/West Africa (Lagos)	USD/TEU	2.50%	2837	2937
South Africa (Durban)	USD/TEU	2.50%	1064	1217
South America (Santos)	USD/TEU	5.00%	1878	2223
West Japan (Base port)	USD/TEU	5.00%	231	231
East Japan (Base port)	USD/TEU	5.00%	238	238
Southeast Asia (Singapore)	USD/TEU	7.50%	132	148
Korea (Pusan)	USD/TEU	2.50%	118	118