

การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 34 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 9/TEU, USD 17/FEU	Effective till 31-Aug-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		
Thailand - Ho Chi Minh	250	350		
Thailand - Cat Lai	70	100		
Thailand - Singapore	80	150		
Thailand - Manila (North & South)	300	450		
	Subject to CIC at destination		Subject to ISOCC USD 23/TEU, USD 46/FEU	
Thailand - Jebel Ali	500	750		
	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	625-725	1,250-1,400	-	
Thailand - Durban / Cape Town	850	1,600	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, USD 106/FEU	
	Subject to ENS USD 30/BL			
Thailand - US West Coast	2,700	3,400	-	
	3,100	3,900		
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

สถานการณ์ค่าระวางในช่วงเดือนสิงหาคม 2563 อัตราค่าระวางในเส้นทางเอเชียคงที่ไม่มีเปลี่ยนแปลง แต่มีการปรับลดค่า Low Sulphur Surcharge ลงจากเดือนที่ผ่านมา 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 ค่าระวางยังคงที่เช่นเดียวกัน โดยค่าระวางอยู่ที่ 850 USD/TEU และ 1,600 USD/FEU ส่วนเส้นทาง Australia อัตราค่าระวางช่วงครึ่งเดือนหลังของสิงหาคม ปรับเพิ่มขึ้น 25 USD/TEU โดยเรียกเก็บอยู่ระหว่าง 625-725 USD/TEU และ 1,250-1,400 USD/FEU โดยไม่มีการเรียกเก็บค่า FAF

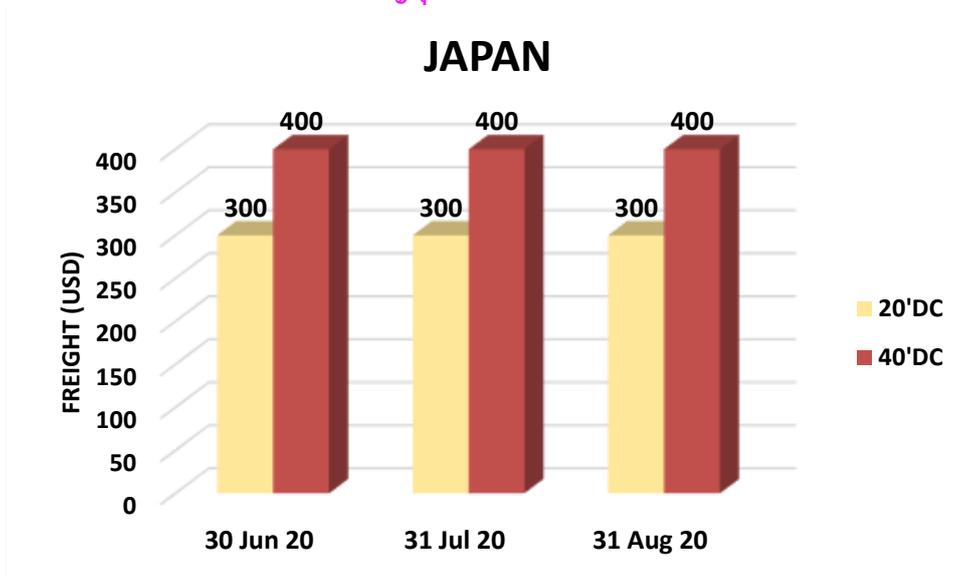
สำหรับเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนหลังของเดือนสิงหาคม ค่าระวางปรับเพิ่มขึ้น 150 USD/TEU และ 250 USD/FEU ทำให้ค่าระวางฝั่ง West Coast อยู่ที่ 2,700 USD/TEU และ 3,400 USD/FEU ในขณะที่ฝั่ง East Coast ค่าระวาง

ปรับเพิ่มขึ้น 300 USD/TEU และ 400 USD/FEU ทำให้ค่าระวางอยู่ที่ 3,100 USD/TEU และ 3,900 USD/FEU โดยมีการเรียกเก็บค่า Panama Low Water (PLW) ในอัตรา 30 USD/ตู้ ซึ่งขณะนี้พบว่า Space เรือในเส้นทางทรานส์แปซิฟิกยังคงค่อนข้างแน่น แต่สถานการณ์ปริมาณสินค้าที่ก่อนหน้านี้มีปริมาณมาก เริ่มปรับตัวดีขึ้น

CONTAINER FREIGHT RATE (REEFER)

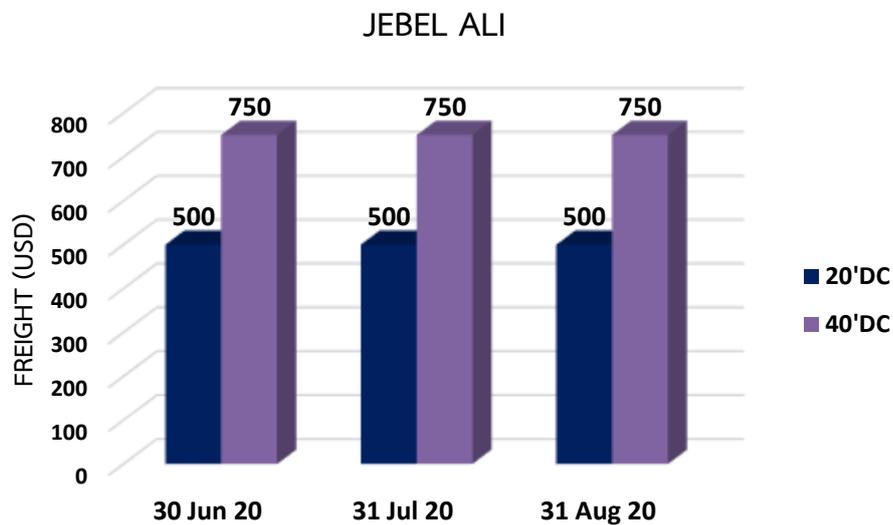
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	700	800	USD 15/TEU, USD 30/FEU	Effective till 31-Aug-2020
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	900	1,200	-	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,500-1,550	1,900-2,000	-	

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



Subject to Low Sulphur Surcharge (Jun.): USD 86/TEU และ USD 172/FEU
(July): USD 17/TEU และ USD 34/FEU
(Aug.): USD 9/TEU และ USD 17/FEU

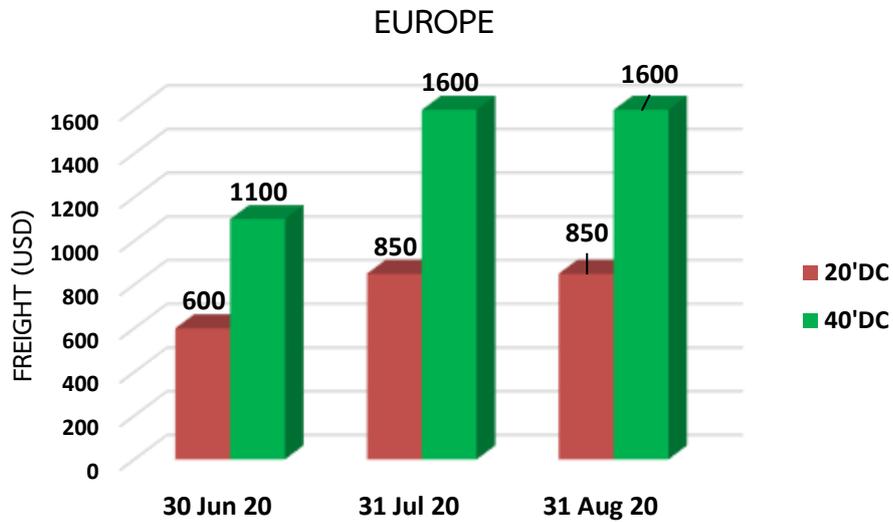
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-Jebel Ali** เดือน มิ.ย. ถึง ส.ค. ปี 2563



Subject to

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

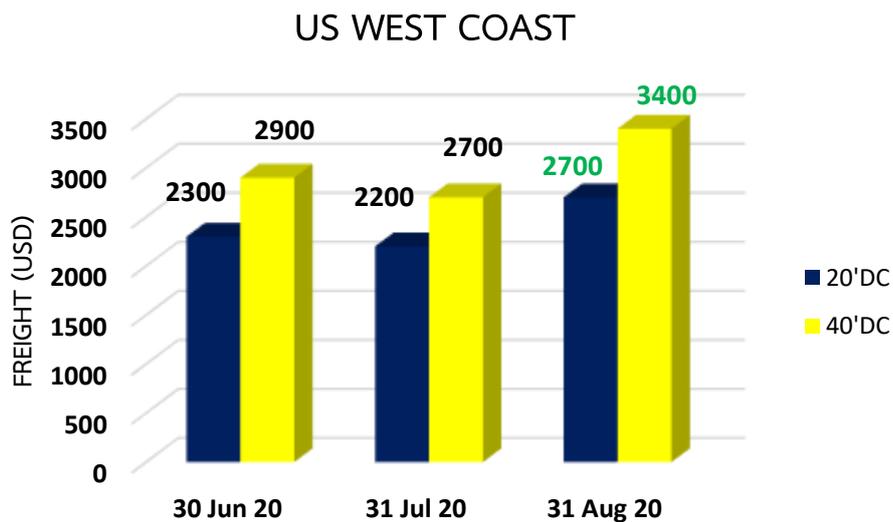
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน มิ.ย. ถึง ส.ค. ปี 2563



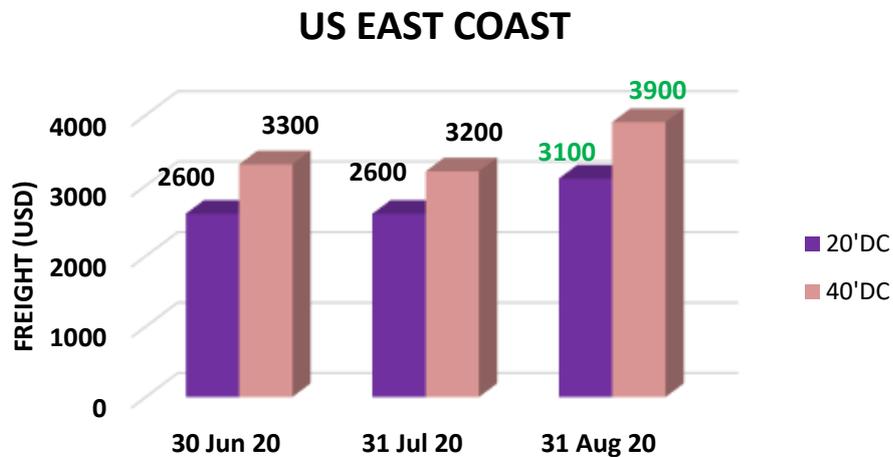
Subject to

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

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



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



Subject to Panama Low Water Surcharge: USD 30/Container

➤ รวบรวมประกาศสำคัญจากสายเรือ

สายเรือ Hapag Lloyd

- ประกาศปรับการเรียกเก็บค่า General Rate Increase (GRI) สำหรับสินค้าจากเส้นทาง Brazil ไปยัง East Asia ดังตาราง

Routing	General Rate Increase (GRI)
	Effective 1-Oct-2020
Brazil to East Asia	USD 100/Container

- ประกาศปรับเปลี่ยนกำหนดการบังคับใช้ข้อกำหนดในการห้ามนำเข้าสินค้าประเภท Waste Cargo ไปยังประเทศจีน โดยมีผลบังคับใช้ตั้งแต่วันที่ 1 มกราคม 2564 (วันที่เดินพิธีการ)

Asia-Europe and Transpac rates see more weekly gains

Main East-West container trades continue to gather steam as higher demand and looming 1 September General Rates Increases push up spot prices. The summer peak in container freight rates on the major East-West trades is showing few signs of petering out. Yet more gains have been recorded by leading indexes this week ahead of anticipated liner General Rates Increases (GRI) at the start of next month.

The Shanghai Containerized Freight Index (SCFI) continued to make steady gains this week with prices on the Europe sub-index up \$21 per TEU to \$937 per TEU and the Mediterranean sub-index gaining \$30 per TEU to \$996 per TEU. Flexport reports that space remains tight on Asia-Europe liner services and is advising customers to make bookings three weeks prior to the cargo-ready date. As reported in Lloyd's Loading List, rollovers are causing trans-Pacific shippers sleepless nights and the lack of slot availability on services out of Asia is continuing to put upward pressure on freight rates. The SCFI's US west coast sub-index is up \$34 per FEU this week to \$3,440 per FEU, while the US east coast index gained \$41 to reach \$3,953 per FEU.

The World Container Index (WCI) also recorded substantial gains this week with the composite index increasing 4.2% and now up 49.7% year-on-year, according to Drewry. The Shanghai-Rotterdam, Shanghai-Los Angeles and Shanghai-New York sub-indexes saw increases of 4-11% this week and are now 14%, 143% and 55%, respectively, higher than a year earlier. Shipping analyst MSI said it was not clear how durable the current

main lane volume rebound would prove, noting “considerable risks around the withdrawal of employment and income support later in the year”.

However, MSI added that “overall it seems demand for containerised goods has weathered COVID-19 in a stronger manner than initially anticipated” and now expects the global primary container trade to shrink by only around -5% year-on-year in 2020. MSI said the exact cause of surges in US west coast spot rates would not be clear until more data becomes available. “There is potentially a role being played by an earlier backlog of rolled cargoes, and possibly carriers are dealing with newer, lower volume and less experienced e-commerce players in the spot freight market, giving them greater market power,” it reported. “But overall it will be surprising if data do not reveal a notable volume increase in mid-July onward.”

MSI added: “More broadly, freight rates across different trades have shown increases or stability after mixed performance over July. Asia-Europe rates have generally trended upwards, while trans-Atlantic rates remain steady. On non-main lane routes Far East-Latin America rates have rebounded from a low reached in July, while Far East-Middle East rates have also trended upward.

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

Container shipping service levels dropping as costs and rates rise

Container shipping costs and service levels are at risk of spiralling out of control, according to Drewry. As well as a massive withdrawal of capacity since the start of the Covid-19 crisis – 468 blanked departures on east-west trades – the analyst said schedule reliability had been “extremely low”.

“In the first half of the year, fewer than two out of three vessels arrived within 24-hours of their ETA,” said Philip Damas, head of Drewry Supply Chain Advisors. “To make matters worse, this is using a measurement which is fairly lenient, because we are setting the ETA at the time of the ship’s departure, by when the carriers should have a good indication of their schedules,” he added.

The blanked sailings and poor reliability naturally resulted in widespread rollovers, said Mr Damas who noted that a Drewry survey of shipper clients had revealed 83% of them had seen cargo rolled. “It caused significant operational problems for shippers and forwarders; reworking or re-booking the shipment, making a lot of contacts and phone calls and wasting a lot of time working late hours. Many shippers today do not receive good data from carriers on rollovers, or they are not able to measure rollovers using internal systems. “So our view is that rollovers are a key issue which has been exposed by the recent crisis – this is the new reality of a much more concentrated marketplace in which shipping lines have more power,” he said.

There has also been a notable increase in carriers offering no-roll premiums, which Mr. Damas said was needed, but they were really just “offering a normal service at premium prices”. The root cause of these service level problems is the number of transport crises, Mr Damas believes, noting the increasing frequency of incidents such as the US port strikes, Hanjin bankruptcy, Maersk cyber attack and now Covid lockdowns and Beirut port explosion. “So shippers and forwarders should plan for continued disruptions,” he added. There are widespread cost implications from this year’s container shipping disruptions, too, not least an increase in freight rates.

According to Drewry senior advisor Stijn Rubens, the average freight rate on the Asia-Europe trade between January and August increased 15% year on year, to \$1,798 per feu. However, after factoring in other freight costs, such as finance, detention and demurrage, and booking processing, the overall increase was \$432, up 16% at \$3,115 per feu. “The indirect cost implications could be multitudes of that,” said Mr. Rubens, “from costs related to missed sales opportunities, safety stock levels, customer satisfaction and retention and internal

stakeholders. “In our view, unless you are really in control of your shipments, and that obviously starts with visibility, then there is a real risk of cost and service levels spiralling out of control.

“Therefore, it’s very important to actively measure your carriers, not just via the EDI data they may send you, but to measure them yourself and benchmark their performance against the market.”

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

New GRI set to push Asia-US West Coast FEU rates above record high

Container spot rates from Asia held firm this week, but with stronger inbound volumes expected into at least mid-September, carriers have been emboldened to impose another general rate increase (GRI) that could elevate rates to the US West Coast to record levels. Forwarders say shipping lines in the eastbound trans-Pacific are telling them to prepare for a Sept. 1 GRI that could push West Coast spot rates above \$4,000 per FEU, a level that appeared inconceivable just a few months ago, when importers signed service contracts generally in the range of \$1,300 to \$1,600 per FEU.

This would be the fifth GRI on US imports from Asia since June 1, when the spot rate was \$2,097 per FEU to the West Coast. In conversations with four non-vessel-operating common carriers (NVOs), executives said carriers continue to leverage tight vessel space and cargo rolling at Asian ports to command ever-higher rates.

“It’s crazy. Space is the name of the game right now,” said Jon Monroe, who serves as a consultant to NVOs. He said carriers have \$4,000 per FEU in their sights. However, unlike the GRIs in June and July, when carriers had reduced capacity through more than 50 blank sailings, the current surge in pricing is demand driven. US imports from Asia rose more than 20 percent sequentially between June and July, notching the first monthly year-over-year increase since September 2019, according to PIERS, a sister company of JOC.com within IHS Markit.



“Most of the capacity has come back, but we still see high pressure on space because the demand side is growing,” Eli Glickman, president and CEO of Zim Integrated Shipping Services, told JOC.com. In June, Zim reentered the Asia-US West Coast trade with an expedited service connecting South China to Los Angeles. “The pressure is coming from increasing demand in the US and Canada in all commodity areas, already for the last two months. We don’t know how long it will continue, but we are expecting strong demand to remain.”

Rattled by the rush

Canceled sailings have stopped, and carriers have been adding unscheduled vessel departures from Asia, known as extra-loaders, at a rapid pace. The Port of Long Beach on Wednesday told JOC.com that carriers deployed 10 extra-loaders in July. They are adding 10 more in August and plan five more in September, according to Noel Hacegaba, the port’s deputy executive director and COO. Los Angeles had 11 unscheduled calls in July and is expecting six to eight more in August, according to a port spokesman.

“This is volume-driven. It’s definitely based on volume,” said Kevin Krause, vice president of ocean services at SEKO Logistics. A wide variety of merchandise, from personal protective equipment (PPE) to office and exercise equipment for home use to e-commerce fulfillment, is in the cargo mix, he said.

Retailers are also importing merchandise from China with a sense of urgency in the event that 20 to 25 percent tariffs that were suspended early this year under a phase one agreement with the US that will expire in late September as planned, said Alan Baer, president of forwarder OL USA. Since vessels departing China arrive two to three weeks later depending upon the routing, some retailers have decided it is better to hold the merchandise in their US warehouses for several weeks rather than risking a large price jump if the tariff relief is not extended, he said.

Container spot rates to ship an FEU from Asia to the US east and west coasts rose 1 percent to \$3,440 and \$3,953, respectively, in the week ending Aug. 21, compared to the prior week, according to the Shanghai Containerized Freight Index, as published on the JOC Shipping & Logistics Pricing Hub. Pricing to the West Coast is 167.5 percent higher than a year ago, and up 62.3 percent to the East Coast. The spot rates actually understate what many beneficial cargo owners (BCOs) and NVOs are paying because carriers are charging premiums for any volumes above the minimum quantity commitments (MQCs) in the contract rates.

The premiums are charged to get a shipment on the intended voyage, or for priority discharge at the destination port, or for expedited release of the container from the US terminal. Each individual premium charge is added to the spot rate, and can range from \$300 per container to more than \$1,000 per FEU, according to a rate sheet shared by an NVO.

Avoiding premium charges

However, some shippers avoid premium charges, which can drive the landed cost to the West Coast well above \$4,000 at the current spot rate level, by shipping with those carriers that offer all-inclusive ocean products. Phillip Tran, director international services at third-party provider APL Logistics Americas, said its OceanGuaranteed product includes guaranteed loading in Asia, equipment availability at the US terminal, and an expedited inland transportation move to the receiving warehouse in one bundled price.

“It’s a white-glove service,” Tran said. The all-in price ends up being about 75 percent lower than air freight, and in many cases is lower than paying today’s high spot rates plus premiums for any services beyond the ocean rate, he said.

As a result, demand for OceanGuaranteed is “oversubscribed” and will remain so at least for the next few weeks, Tran said. However, APL Logistics will honor customer bookings only for the slots it has available because it will not roll any cargo. For BCOs who can’t get all the slots they need for a particular sailing, APL Logistics will attempt to place the overflow shipments on the next voyage, he said.

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 14 August 2020	Current Index 21 August 2020
Comprehensive Index			1167.91	1183.87
Service Routes				
Europe (Base port)	USD/TEU	20%	916	937
Mediterranean (Base port)	USD/TEU	10%	967	996
USWC (Base port)	USD/FEU	20%	3406	3440
USEC (Base port)	USD/FEU	7.50%	3913	3953
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	780	796
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	1098	1107
East/West Africa (Lagos)	USD/TEU	2.50%	2693	2684
South Africa (Durban)	USD/TEU	2.50%	799	872
South America (Santos)	USD/TEU	5.00%	1309	1367
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%	134	133
Korea (Pusan)	USD/TEU	2.50%	118	118

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