การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 18 พ.ศ. 2563

สรุปค่าระวางเรือประจำสัปดาห์

CONTAINER ALL IN FREIGHT RATE (DRY)

<table>
<tr><th rowspan="2">ROUTE</th><th colspan="2">SIZE</th><th rowspan="2">Low Sulphur Surcharge (LSS)</th><th rowspan="2">Remark</th></tr>
<tr><th>USD/20’</th><th>USD/40’</th></tr>
<tr><td>Thailand - Shanghai</td><td>200</td><td>300</td><td rowspan="4">Subject to ISOCC
USD 86/TEU, USD 172/FEU</td><td rowspan="17">Effective till
31-May-2020</td></tr>
<tr><td>Thailand - Qingdao</td><td>300</td><td>450</td></tr>
<tr><td>Thailand - Hong Kong</td><td>100</td><td>200</td></tr>
<tr><td>Thailand - Japan (Main Port)</td><td>300</td><td>400</td></tr>
<tr><td>Thailand - Klang</td><td>300</td><td>500</td><td rowspan="5">Subject to ISOCC
USD 57/TEU, USD 114/FEU</td></tr>
<tr><td>Thailand - Jakarta</td><td>400</td><td>600</td></tr>
<tr><td>Thailand - Hochiminh</td><td>250</td><td>350</td></tr>
<tr><td rowspan="2">Thailand – Manila
(North & South)</td><td>300</td><td>450</td></tr>
<tr><td colspan="2">Subject to CIC at destination</td></tr>
<tr><td rowspan="2">Thailand - Jebel Ali</td><td>500</td><td>750</td><td rowspan="2">Subject to ISOCC
USD 101/TEU, USD 202/FEU</td></tr>
<tr><td colspan="2">Subject to War Risk Surcharge:
USD 35/TEU, USD 70/FEU</td></tr>
<tr><td>Thailand - South Korea (Busan)</td><td>100</td><td>200</td><td rowspan="2">USD 100/TEU, USD 200/FEU</td></tr>
<tr><td>Thailand - South Korea (Incheon)</td><td>150</td><td>300</td></tr>
<tr><td>Thailand - Melbourne</td><td>315-465</td><td>630-880</td><td>FAF: USD 60/TEU, USD 120/FEU</td></tr>
<tr><td rowspan="2">Thailand – Durban / Cape Town</td><td>850</td><td>1600</td><td rowspan="2">Subject to ISOCC
USD 187/TEU, USD 374/FEU</td></tr>
<tr><td colspan="2">Subject to SCMC USD 30/BL</td></tr>
<tr><td rowspan="2">Thailand - Europe
(Main Port)</td><td>750</td><td>1,400</td><td rowspan="2">ISOCC: USD177/TEU, USD354/FEU</td></tr>
<tr><td colspan="2">Subject to ENS USD30/BL</td></tr>
<tr><td>Thailand - US West Coast</td><td>1,400</td><td>1,800</td><td rowspan="3">-</td><td rowspan="3">Effective till
14-May-2020</td></tr>
<tr><td rowspan="2">Thailand - US East Coast</td><td>2,200</td><td>2,800</td></tr>
<tr><td colspan="2">Subject to Panama Low Water
USD 15/TEU, USD 30/FEU</td></tr>
</table>

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

สถานการณ์ค่าระวางในช่วงเดือนพฤษภาคม 2563 อัตราค่าระวางในเส้นทางเอเชียคงที่ไม่มีการเปลี่ยนแปลง เช่นเดียวกับการเรียกเก็บค่า Low Sulphur Surcharge ที่ยังคงที่จนถึงสิ้นสุดไตรมาสที่ 2 เนื่องจากเป็นสัญญาซื้อขายน้ำมันล่วงหน้า 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

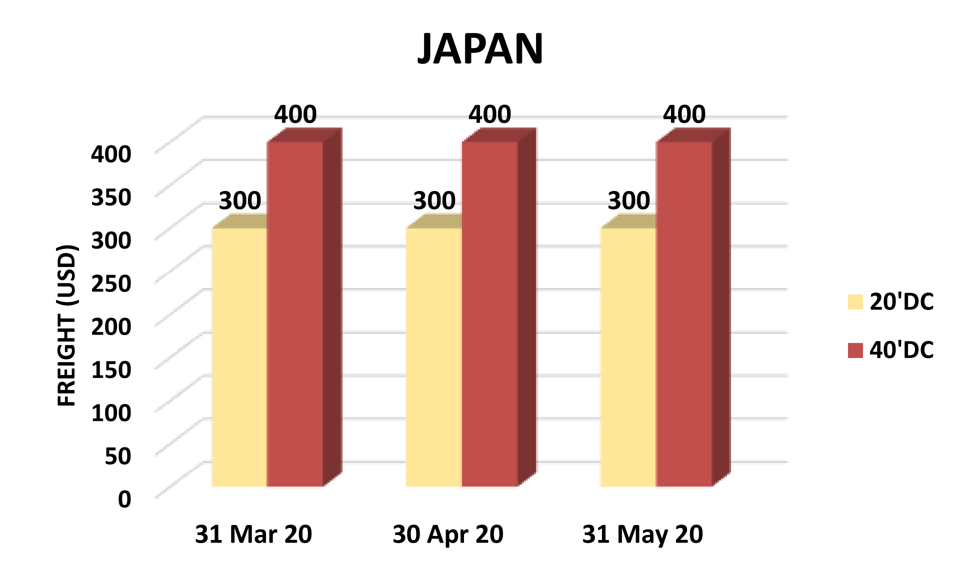
สำหรับเส้นทาง Europe ค่าระวางปรับลดลง 100 USD/TEU เนื่องจากมีความต้องการสินค้าจากประเทศไทย โดยค่าระวางอยู่ที่ 750 USD/TEU และ 1,400 USD/FEU ส่วนเส้นทาง Australia อัตราค่าระวางปรับเพิ่มขึ้น 75 USD/TEU โดยเรียกเก็บอยู่ระหว่าง 315-465 USD/TEU และ 630-880 USD/FEU และมีการปรัลลดการเรียกเก็บค่า FAF โดยเรียกเก็บในอัตรา 60 USD/TEU

สำหรับเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนแรกของเดือนพฤษภาคม ค่าระวางฝั่ง West Coast ตู้สั้นคงที่อยู่ที่ 1,400 USD/TEU ในขณะที่ตู้ 40’ ปรับเพิ่มขึ้น 50 USD/FEU โดยเรียกเก็บในอัตรา 1,800 USD/FEU ในขณะที่ฝั่ง East Coast ค่าระวางปรับลดลง 100 USD/ตู้ ทำให้ค่าระวางอยู่ที่ 2,200 USD/TEU และ 2,800 USD/FEU โดยมีการเรียกเก็บค่า Panama Low Water (PLW) ในอัตรา 15 USD/TEU สำหรับ Service ที่วิ่งผ่านคลองปานามา

CONTAINER FREIGHT RATE (REEFER)

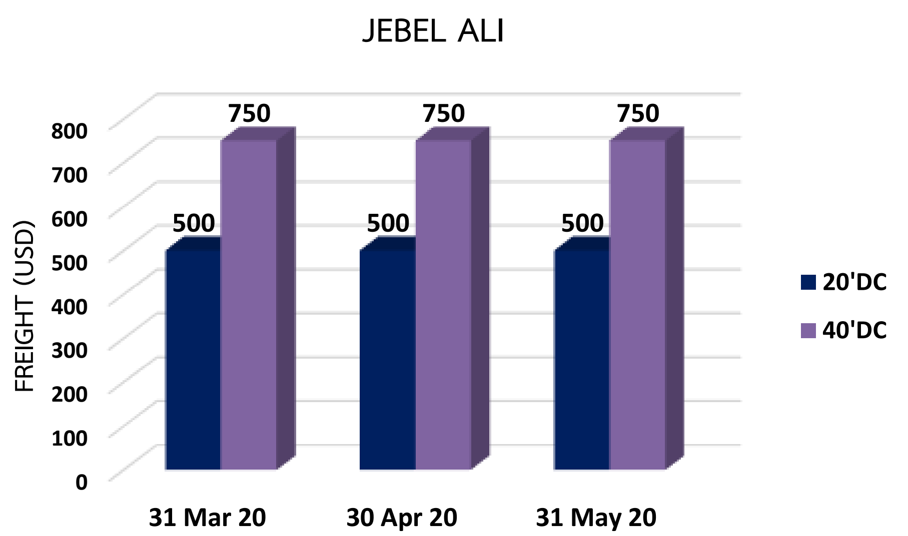
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20’	USD/40’		
Thailand-Hong Kong	800	1,200	USD 129/TEU, USD 257/FEU	Effective till 31-May-2020
Thailand-Shanghai	800-900	900-1,000		
Thailand-Japan (Tokyo, Yokohama)	900	1,200	USD 65/TEU, USD 130/FEU	
Thailand-EU (Main Ports)	1,400	1800	USD 185/TEU, USD 370/FEU	
(DEHAM, NLRTM, FRLEH)				
สินค้าประเภททุเรียน				
Thailand-Hong Kong	N/A	1,800	(all-in)	Effective week by week

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



Subject to Low Sulphur Surcharge: USD86/TEU และ USD172/FEU

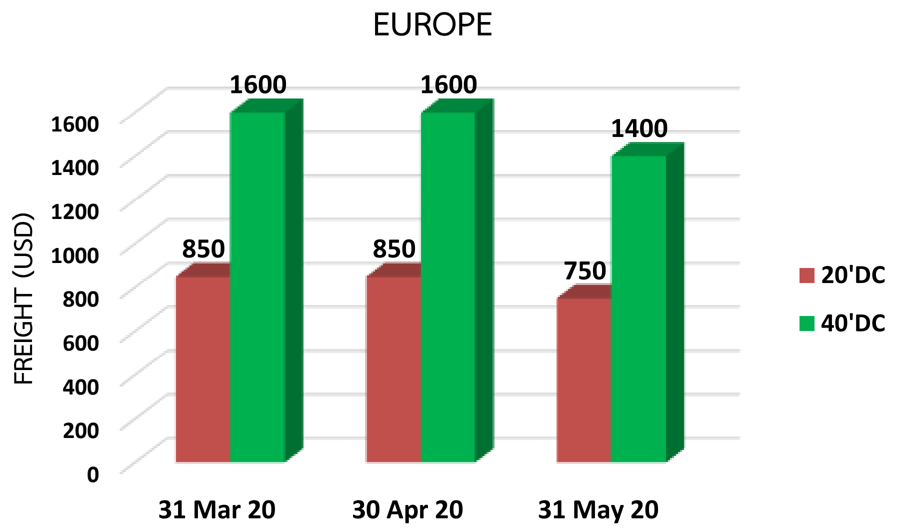
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-Jebel Ali เดือน มี.ค. ถึง พ.ค. ปี 2563



Subject to

- War Risk Surcharge: USD35/TEU และ USD70/FEU
- Low Sulphur Surcharge: USD101/TEU และ USD202/FEU

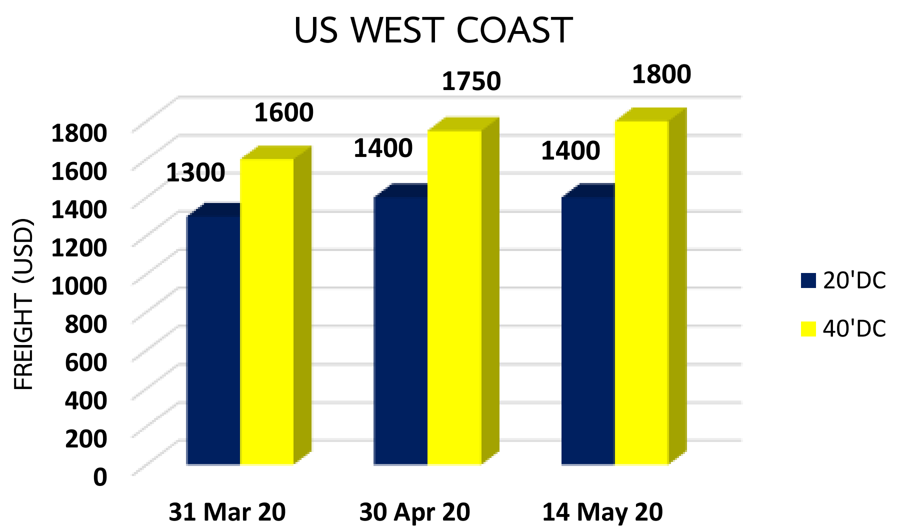
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน มี.ค. ถึง พ.ค. ปี 2563



Subject to

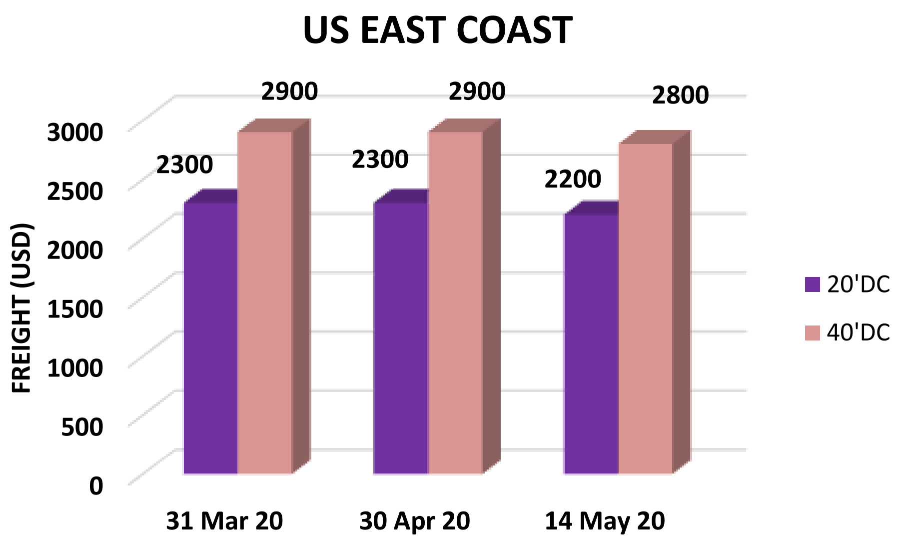
- ENS: USD30/BL
- ISOCC: USD177/TEU และ USD354/FEU

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



Subject to Panama Low Water Surcharge: USD15/TEU

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



Subject to Panama Low Water Surcharge: USD15/TEU

➢ **รวบรวมประกาศสำคัญจากสายเรือ**

สายเรือ Hapag Lloyd

- ประกาศแจ้งเรื่องการหยุดให้บริการสำหรับการขนส่งสินค้าเข้า และออกจาก Inland Container Depot (ICD) Bhusawal ในประเทศอินเดีย โดยมีผลตั้งแต่วันที่ 29 เมษายน 2563
- ประกาศปรับการเรียกเก็บค่า General Rate Increase (GRI) สำหรับสินค้าจากเส้นทางเอเชียไปยังเส้นทาง East Coast South America ในอัตรา USD 600/ตู้ โดยมีผลตั้งแต่วันที่ 15 พฤษภาคม 2563

สายเรือ Zim Line

- ประกาศแจ้งให้ทราบเรื่องการเรียกเก็บค่า Low Water Surcharge เนื่องจากสถานการณ์ภัยแล้งในยุโรป ทำให้ระดับน้ำในแม่น้ำไรน์ (Rhine River) ลดต่ำลง ทำให้พบปัญหาความสามารถในการบรรทุกสินค้าของเรือ Barge ที่วิ่งระหว่างท่าเรือ Antwerp และ Rotterdam ไปยังประเทศเยอรมนี ฝรั่งเศส และสวิสเซอร์แลนด์ ผ่านแม่น้ำไรน์ ลดลง สายเรือจึงประกาศอัตราเรียกเก็บประจำวันขึ้นอยู่กับระดับน้ำ ดังนั้น หากผู้ส่งออกมีสินค้าไปยังเส้นทางดังกล่าว โปรดตรวจสอบอัตราเรียกเก็บจากทางสายเรืออีกครั้งหนึ่ง

สายเรือ APL และ CNC

- ประกาศแจ้งยกเลิกการเรียกเก็บค่า Low Sulphur Surcharge โดยมีผลตั้งแต่วันที่ 1 มิถุนายน 2563 (เส้นทาง Intra-Asia สำหรับสายเรือ CNC)

WTO report finds growing number of export restrictions in response to COVID-19 crisis

Eighty countries and customs territories so far have introduced export prohibitions or restrictions as a result of the COVID-19 pandemic according to a new report by the WTO Secretariat. The report, which is based on information from official sources and news outlets, draws attention to the current lack of transparency at the multilateral level and long-term risks that export restrictions pose to global supply chains and public welfare. The new export prohibitions and restrictions mostly cover medical supplies such as face masks, pharmaceuticals, ventilators and other medical equipment, the report finds. Some of the measures have extended the controls to other products such as food and toilet paper.

However, only 13 WTO members (or 39 if EU member states are counted individually) have submitted information on these new measures in line with WTO rules for quantitative restrictions. Three of them have notified export restrictions on foodstuffs pursuant to the WTO Agriculture Agreement. The report notes the harms and delays that insufficient information inflicts on countries seeking to procure materials to fight against the COVID-19 pandemic and provides guidance on how WTO members can notify their measures. Only a handful of notifications were submitted in March 2020 and these have since increased in April. While the report acknowledges exceptions in WTO rules for export prohibitions or restrictions, it also highlights costs that both importing and exporting economies will face in the long run, particularly in terms of lower supply and higher prices for much-needed products.

Key points

- The COVID-19 pandemic presents the world with an unprecedented public health challenge. Measures to curb the spread of the disease have shut down large swathes of the world economy. Worldwide demand for medical products to fight the pandemic is unprecedented. All countries depend on international trade and global value chains to source these products. This is challenging in light of ongoing disruptions to international transport, particularly air cargo, which often goes together with passenger travel.
- An additional complicating factor is the growing number of export prohibitions and restrictions, which some WTO members have introduced to mitigate critical shortages at the national level. Responding to COVID-19 urgently requires sharp increases in global production of essential medical supplies. Well-functioning value chains can help quickly ramp up production while containing cost increases. As new production becomes available, trade will be essential to move supplies from where they are abundant to where they are lacking, especially as the disease peaks at different times in different locations. However, a lack of international cooperation risks hampering the urgently required supply response.
- The information available thus far suggests that 80 countries and separate customs territories have introduced export prohibitions or restrictions as a result of the COVID 19 pandemic, including 46 WTO members (72 if EU member states are counted individually) and eight non-WTO members. Most of these have been described as temporary measures. At least two members have already removed some of those restrictions.
- The products covered by these new export prohibitions and restrictions vary considerably; most have focused on medical supplies (e.g. facemasks and shields), pharmaceuticals and medical equipment (e.g. ventilators), but others have extended the controls to additional products, such as foodstuffs and toilet paper.
- While Article XI of the General Agreement on Tariffs and Trade (GATT) 1994 broadly prohibits export bans and restrictions, it allows members to apply them temporarily to prevent or relieve critical shortages of foodstuffs or other essential products. If members move to restrict exports of foodstuffs temporarily, the Agreement on Agriculture requires them to give due consideration to the food security needs of others. WTO rules also contain more general exceptions, which could be used to justify restrictions provided that they do not constitute a means of arbitrary or unjustifiable discrimination between countries, or a disguised restriction on international trade.
- Export prohibitions and restrictions applied by large exporters may in the short run lower domestic prices for the goods in question and increase domestic availability. But the strategy is not costless: the measures reduce the world's supply of the products concerned and importing countries without the capacity to manufacture these products suffer. And exporters also risk losing out in the long run. On

the one hand, lower domestic prices will reduce the incentive to produce the good domestically, and the higher foreign price creates an incentive to smuggle it out of the country, both of which may reduce domestic availability of the product. On the other hand, restrictions initiated by one country may end-up triggering a domino effect. If trade does not provide secure, predictable access to essential goods, countries may feel they have to close themselves from imports and pursue domestic production instead, even at much higher prices. Such a scenario would likely result in lower supply and higher prices for much-needed merchandise. The long-term effects could be significant.

- Transparency at the multilateral level is lacking. In principle, all these measures should be notified as soon as possible to the WTO pursuant to the 2012 “Decision on Notification Procedures for Quantitative Restrictions” (QR Decision), while those relating to foodstuffs should also be notified to the Committee on Agriculture. However, to date, 13 WTO members (39 if EU member states are counted individually) have notified the introduction of new measures under the QR Decision and three have notified export restrictions on foodstuffs pursuant to Article 12 of the Agreement on Agriculture.
- Economic operators and members are having to cope with a high degree of uncertainty, as it remains unclear what measures have been adopted by which countries, and new measures are being introduced regularly. Insufficient information makes it hard for them to efficiently adjust their purchasing decisions and find new suppliers This could be particularly damaging for those seeking to procure materials needed for the fight against the COVID-19 pandemic.
- The G20 Ministerial Statement of 30 March 2020 stressed that “emergency measures designed to tackle COVID-19, if deemed necessary, must be targeted, proportionate, transparent, and temporary, and that they do not create unnecessary barriers to trade or disruption to global supply chains, and are consistent with WTO rules.” More recently, the G20 Agriculture Ministers Statement of 21 April 2020 reaffirmed the “agreement not to impose export restrictions or extraordinary taxes on food and agricultural products purchased for non-commercial humanitarian purposes by the World Food Programme (WFP) and other humanitarian agencies”.
- WTO Director-General Roberto Azevêdo has urged members to exercise maximal restraint in the use of export restrictions and other measures that could disrupt supply chains. He has also called on WTO members to improve transparency on any new trade-related measures introduced as a result of the COVID-19 pandemic.
- Possible actions to improve transparency in this area include:
    - Ensuring that the new measures are adequately published at the national level and, when possible, making them available in the website(s) of the relevant national authorities.
    - Notifying as soon as possible any new export restriction to the WTO pursuant to the QR Decision; in case these restrictions affect foodstuffs, notifying them to the Committee on Agriculture as well.
    - Updating as necessary the information under the “transparency notification” of Article 1.4 of the Agreement on Trade Facilitation, including the relevant enquiry points.
    - Endeavouring to provide additional information to other members beyond that required by the notifications, whenever possible.

Source: https://www.wto.org/

Hutchison Ports introduces autonomous trucks in Thailand

Equipped with advanced AI machine-learning technology, the vehicles will be integrated with the existing conventional fleet of trucks to transfer containers between the quay and the yard.

Hutchison Ports Thailand has become the first port operator in Thailand and among the first in the world to acquire and test autonomous trucks at its Terminal D facility at Laem Chabang Port, Chon Buri, where they will transfer containers between the quay and the yard. The leading container port operator said the move “marks a huge step forward for the development of the nation’s ‘smart’ infrastructure along the Eastern Economic Corridor (EEC), with the autonomous, ‘Qomolo’ trucks promising to improve efficiency and safety at its operations at Terminal D”. It said the investment will not only benefit Hutchison Ports Thailand’s customers and port users at Terminal D, “but other stakeholders along the EEC; a key gateway to the greater Mekong region”.

The six electric ‘Qomolo’ trucks (also known as the ‘Q-Truck’), arrived at Terminal D from Shanghai, China on 26 April, with the testing phase set to run for one year. During this period, the trucks will be integrated with the existing conventional fleet of trucks to transfer containers between the quay and the yard.
Equipped with advanced AI machine-learning technology and a wireless charging system, the Q Truck can operate non-stop for more than 24 hours, Hutchison said. The trucks utilize the advanced ‘LiDAR’ light detection and range technology, through which it “can instantaneously (and accurately) detect and survey its surroundings in all directions, generating a precise, internal 3D map, enabling it to accurately analyse and avoid obstacles and collisions”.

The operation of the trucks will be integrated into – and controlled by – Hutchison Ports’ Next Generation Terminal Management System (nGen), which works in conjunction with other innovations – such as remote controlled-cranes – to plan transport routes, manage operation time schedules and arrival patterns. Stephen Ashworth, managing director for Thailand & South East Asia at Hutchison Ports, said: “The autonomous ‘Q-Trucks’ utilise the latest technology and innovation, and are part of our ongoing plan to transform Terminal D into the most technologically advanced and efficient container terminal in the region. The Q Truck continues to push the envelope for port innovation and along with our other already and soon-to-be implemented innovations, such as remote-controlled crane-technology, online e-tracking services, gate automation and blockchain technology, we are rapidly approaching our goal of becoming the nation’s first fully-developed ‘smart port.”

Hutchison Ports Thailand (HPT) is situated in Laem Chabang Port, the largest port in Thailand, 130 kilometres to the southeast of Bangkok in the coastal province of Chonburi. The port provides a full range of auxiliary services, including a container freight station, a double track railway and improved highway connections with Thailand’s hinterland. HPT currently operates Terminals A2, A3, C1, C2 and D1 is now developing for operation D2 and D3.

HPT is a member of Hutchison Ports, the port and related services division of CK Hutchison Holdings Limited (CK Hutchison). It is a leading port investor, developer and operator with a network of port operations in 52 ports spanning 27 countries throughout Asia, the Middle East, Africa, Europe, the Americas and Australasia.

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

Container cargo imbalance from COVID-19 deepens

Forwarders and insurers warn that cargo flows are becoming more uneven across key markets as a natural container imbalance on headhaul and backhaul trades is exacerbated by extensive blank sailings from carriers trying to match capacity with declining demand. Stay-at-home orders and the closure of most retail outlets across Europe and North America since early March to limit the spread of the coronavirus disease 2019 (COVID-19) has erased consumer demand and stopped manufacturing in many parts of the world. But cargo has been steadily building up in warehouses, port terminals, and inland depots during the lockdowns, according to forwarder association FIATA and insurer TT Club. “These are primarily non-essential products, for which there is little demand as retail outlets are closed or supplies for production lines that are either static or at reduced capacity," TT Club noted in a statement this week.

The insurer said 90 percent of the UK warehousing capacity was full, with the UK Warehousing Association (UKWA) forecasting that all available space will be gone in two weeks. TT Club gave as an example a UK high-street fashion retailer that had been forced to lease 40 percent more storage than normal to accommodate the arrival of products it would be unable to sell. Some of the major carriers are offering "Delay in Transit" options that allow shippers to store import containers at transshipment hubs as cargo owners adjust supply chains in response to the coronavirus. These include CMA CGM and Mediterranean Shipping Co., which this week announced it was expanding its "Suspension of Transit" (SOT) offering by adding four more transshipment hubs where cargo owners can store cargo outside the marine terminal. Maersk Line is offering storage at origin ports in Asia, where goods can be quickly loaded once demand returns.

Problem more acute in Europe

Europe's hub ports appear to be more affected by an accumulation of cargo than those in North America, where the ports no longer anticipate equipment dislocations, such as they feared would take place in the first quarter when terminals were struggling to return empty containers to Asia. Detlef Trefzger, CEO of Kuehne + Nagel, told JOC.com this week after announcing the forwarder's first quarter earnings that all the cargo that left China in March after factories reopened arrived in Europe by mid-April. "The challenge for our customers is what to do with the stuff. Does it go into an inbound warehouse, does it go into merchandise?" he said. Either way, the containers will not be emptied and returned to service anytime soon, worsening a container imbalance that has existed on the Asia-Europe trade to one degree or another, FIATA highlighted in a position paper this week.

The forwarder association said container imbalances have been a perennial issue in the global supply chain, with increasing vessel sizes over the past decade, consolidation, and the emergence of three alliances leading to higher peaks in container terminals and land-side infrastructure. But also inherent in the global nature of the world's supply chains was the impact of major regional holidays, especially Chinese New Year when factories are closed for up to three weeks. "In the current environment, these imbalances are exacerbated by shipping lines employing substantial numbers of blank sailings to adjust supply, which impact the availability of containers for backhaul export shipments in the importing countries," the FIATA paper noted. "Congested terminals, temporary storage, abandoned cargo — these constitute just some of the major problems facing the global supply chain today," it added. "Based on the current economic positions, it seems the global maritime supply chain is in for stormy weather in the months to come."

Mixed picture globally

A recent survey by the International Association of Ports and Harbors (IAPH) shows a mixed picture at ports around the world, with 35 percent reporting an increase in the utilization of warehousing and distribution facilities for foodstuffs and medical supplies, with some ports reporting capacity shortages. The uneven impact on cargo flows can be seen in different verticals and geographies. For instance, auto industry shipments have fallen off and Indian export cargo has come to a near standstill, whereas Latin American markets have so far been largely uninterrupted. "I think it's very difficult to really draw from any historical experience on this situation because it's such a global impact," said Uffe Ostergaard, president of Hapag-Lloyd America. "Different markets are dealing with it differently, and we also see big variation in how different industry segments are impacted and deal with the crisis."

"China has come back up, but then other Asian markets have come down, and [demand] moves in different ways and makes it harder to manage," he added. Ostergaard told JOC.com that carriers had to be able to make rapid changes in the network design to be prepared when demand improves, something that has been on display with the extensive blank sailing programs of the alliances.

"Our approach is to be cautious in terms of capacity allocation and if for some reason the market comes back stronger than we expect, great, and then maybe we lose out a little bit, but we don't put cost into something we don't know will have a return," 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 24 April 2020	Current Index 30 April 2020
Comprehensive Index			818.16	852.27
Service Routes				
Europe (Base port)	USD/TEU	20%	753	739
Mediterranean (Base port)	USD/TEU	10%	844	840
USWC (Base port)	USD/FEU	20%	1495	1724
USEC (Base port)	USD/FEU	7.50%	2620	2773
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	650	637
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	929	947
East/West Africa (Lagos)	USD/TEU	2.50%	2752	2742
South Africa (Durban)	USD/TEU	2.50%	788	789
South America (Santos)	USD/TEU	5.00%	886	1050
West Japan (Base port)	USD/TEU	5.00%	234	234
East Japan (Base port)	USD/TEU	5.00%	243	243
Southeast Asia (Singapore)	USD/TEU	7.50%	186	179
Korea (Pusan)	USD/TEU	2.50%	120	120

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