การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 37 พ.ศ. 2563

สรุปค่าระวางเรือประจำสัปดาห์

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	SIZE USD/20’	SIZE USD/40’	Low Sulphur Surcharge (LSS)	Remark
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	Subject to ISOCC USD 11/TEU, USD 23/FEU	
Thailand - Jakarta	400	600		
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 ISOCC USD 34/TEU, USD 68/FEU	
	Subject to War Risk Surcharge: USD 35/TEU, USD 70/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	3,400	4,300	-	
Thailand - US East Coast	4,100	5,100		
	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

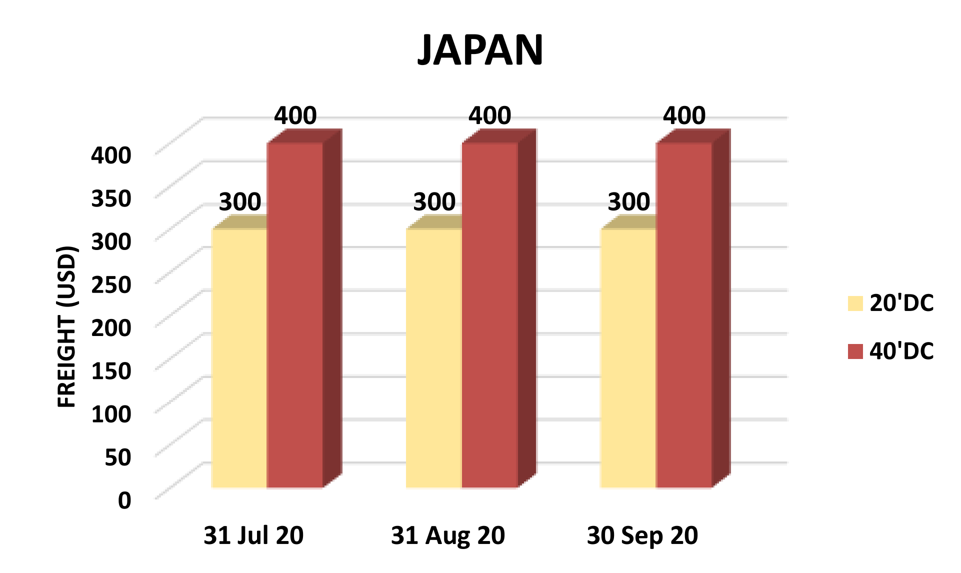
ส่วนเส้นทางที่ค่าระวางปรับเพิ่มขึ้น ได้แก่ เส้นทาง Australia ค่าระวางปรับเพิ่มขึ้น 50 USD/TEU โดยเรียกเก็บอยู่ระหว่าง 675-775 USD/TEU และ 1,350-1,500 USD/FEU และเรียกเก็บค่า FAF ในอัตรา 6 USD/TEU ในขณะที่เส้นทาง Europe มีการปรับเพิ่มการเรียกเก็บค่า Peak Season Surcharge (PSS) ในอัตรา 150 USD/TEU (ซึ่งสามารถเจรจาต่อรองได้)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

กันยายน ค่าระวางฝั่ง West Coast ปรับเพิ่มขึ้น 400 USD/TEU และ 500 USD/FEU ทำให้ค่าระวาง อยู่ที่ 3,400 USD/TEU และ 4,300 USD/FEU ในขณะที่ฝั่ง East Coast ค่าระวางปรับเพิ่มขึ้น 500 USD/TEU และ 600 USD/FEU ทำให้ค่าระวางอยู่ที่ 4,100 USD/TEU และ 5,100 USD/FEU ซึ่งขณะนี้ยังคงพบปัญหา Space เรือในเส้นทางทรานส์แปซิฟิกที่ยังคงค่อนข้างแน่นอย่างต่อเนื่อง โดยเฉพาะอย่างยิ่งทางฝั่ง East Coast ที่ได้ Space Allocation น้อยกว่า ดังนั้น ผู้ส่งออกจำเป็นต้องวางแผน และสำรองระวางล่วงหน้ากับสายเรือที่ใช้บริการ หากท่านมีสินค้าไปยังเส้นทางดังกล่าว

CONTAINER FREIGHT RATE (REEFER)

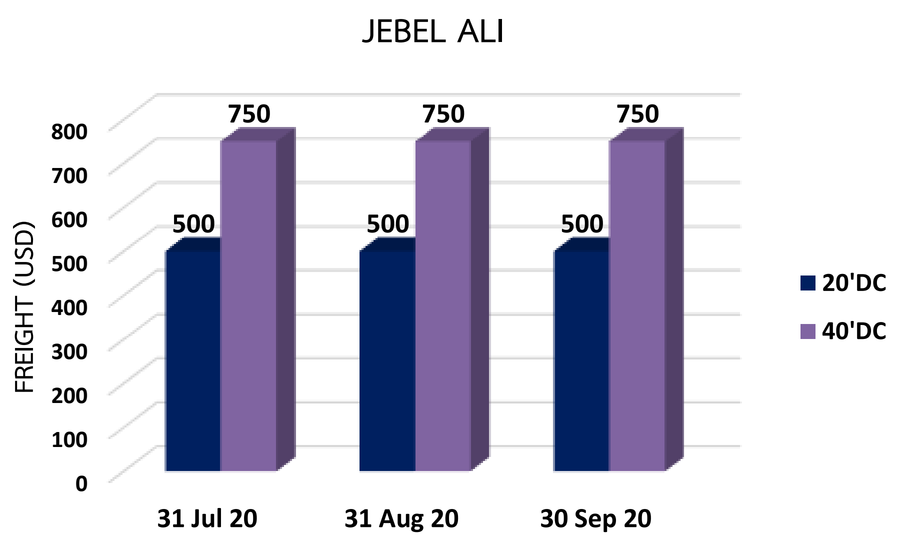
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20’	USD/40’		
Thailand-Hong Kong	700	800	USD 30/TEU, USD 55/FEU	Effective till 30-Sep-2020
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	900	1,200	-	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,500-1,550	1,900-2,000	USD 14/TEU,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

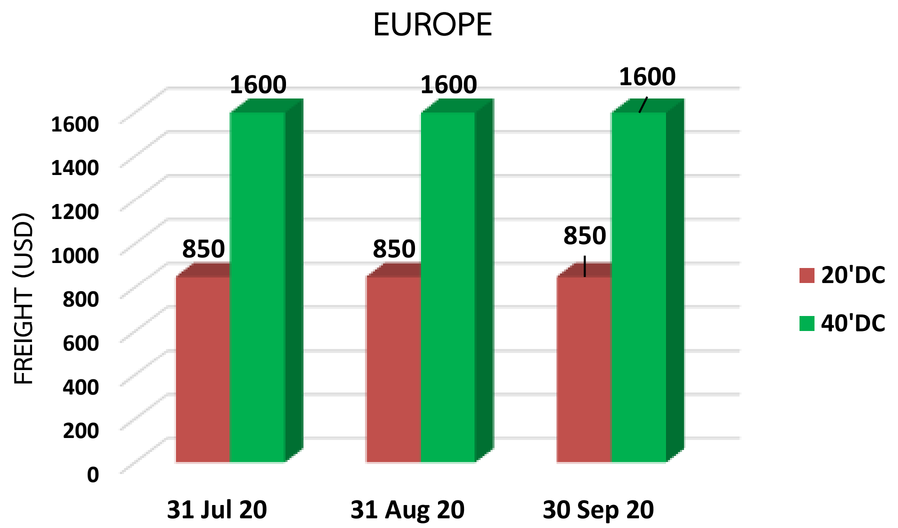
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-Jebel Ali เดือน ก.ค. ถึง ก.ย. ปี 2563



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

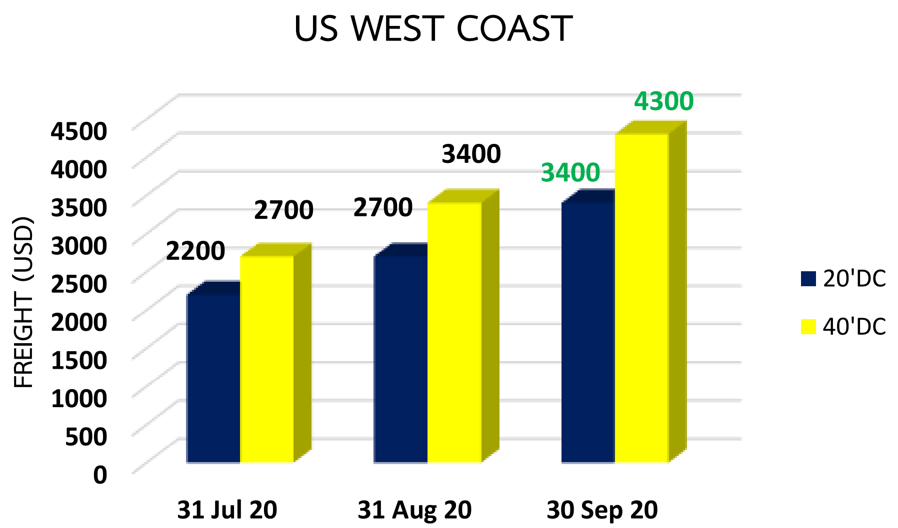
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน ก.ค. ถึง ก.ย. ปี 2563



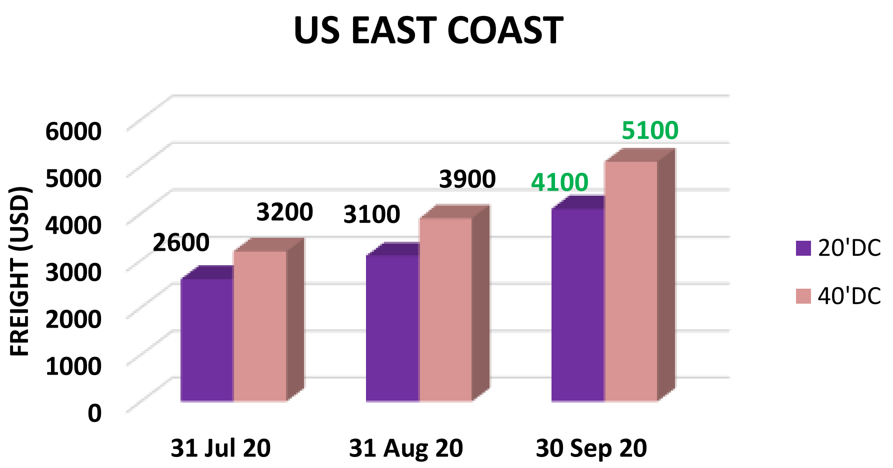
Subject to

- 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



Subject to Panama Low Water Surcharge: USD 30/Container

➢ **รวบรวมประกาศสำคัญจากสายเรือ**

<u>สายเรือ ONE</u>

- ประกาศแจ้งให้ทราบว่าสายเรือมีบริการ ONE E-commerce Original BL Printing Application ซึ่งผู้ใช้บริการสามารถเข้าไปใช้งานได้ตลอด 24 ชั่วโมง โดยสามารถเลือก Print สำเนาของ OBL ในรูปแบบ PDF. File ซึ่งผู้ใช้งานจะได้รับอีเมลล์ที่มี Link เพื่อเข้าสู่หน้าต่างที่เป็น eCommerce Login ทั้งนี้ ผู้ใช้บริการสามารถสมัครเข้าใช้แอพพลิเคชั่นกับทางสายเรือโดยตรง และจะได้รับ User ID เพื่อเข้าใช้บริการ หากมีข้อสงสัยเพิ่มเติมเรื่องเงื่อนไขการใช้บริการ และข้อตกลงด้านเอกสาร (Document Agreement) ดังกล่าว สามารถสอบถามไปยังเจ้าหน้าที่ของสายเรือ

<u>สายเรือ Hapag Lloyd</u>

- ประกาศปรับการเรียกเก็บค่า General Rate Increase (GRI) สำหรับ Shipment จาก East Asia ไปยัง East Coast South America ในเดือนกันยายน โดยมีรายละเอียดดังตาราง

Routing	General Rate Increase (GRI)		
	Effective 1-Sep-2020	Effective 15-Sep-2020	Effective 22-Sep-2020
To East Coast South America	USD 1,000/Container	USD 1,200/Container	USD 1,400/Container

<u>สายเรือ MSC</u>

- ประกาศแจ้งเรียกเก็บค่า Sydney Port Congestion Surcharge (CGS) เนื่องจากพบปัญหาความแออัดภายในบริเวณท่าเรือ Sydney ในประเทศออสเตรเลีย โดยเรียกเก็บในอัตรา USD 300/TEU สำหรับสินค้าที่ส่งออก หรือนำเข้าในท่าเรือตั้งแต่วันที่ 14 กันยายน 2563 จนกว่าจะมีประกาศเปลี่ยนแปลง

<u>สายเรือ CMA CGM</u>

- ประกาศปรับการเรียกเก็บค่า Booking Cancellation Fee สำหรับสินค้าจากประเทศไทย ไปยังเส้นทางต่างๆ โดยมีรายละเอียดดังตาราง มีผลตั้งแต่วันที่ 1 ตุลาคม 2563

Booking Cancellation Fee	FROM Current Tariff	TO New Tariff effective from 1 October 2020
20" Dry Container	200 USD	3300 THB
40" Dry Container	400 USD	6600 THB
20" Reefer Container	200 USD	4125 THB
40" Reefer Container	400 USD	8250 THB
20" Special Equipment Container	200 USD	4125 THB
40" Special Equipment Container	400 USD	8250 THB
Notification period for cancellation without charges	3 days before cut-off date	5 days before cut-off date

สายเรือ CMA CGM, ANL และ CNC

- ประกาศปรับการเรียกเก็บค่า Booking Cancellation Fee และ Booking Postponement Fee สำหรับ SEAPRIORITY go จากประเทศไทย ไปยังเส้นทางต่างๆ โดยมีรายละเอียดดังตาราง มีผลตั้งแต่วันที่ 1 ตุลาคม 2563

Additional Booking Cancellation Fee for SEAPRIORITY go:

Scope	Currency	CMA CGM	ANL	CNC	Remarks
All Thailand Ports to **All Destinations**	USD	100	100	50	Per container

Booking Postponement Fee for SEAPRIORITY go:

Scope	Currency	CMA CGM	ANL	CNC	Remarks
All Thailand Ports to **All Destinations**	USD	75	75	25	Per container

Current ocean freight recovery may not be sustained

With the pandemic far from over and stimulus packages coming to an end, BIMCO warns of a long, drawn-out recovery for container shipping as stagnating economic activity takes its toll on demand. The current boom in volumes, particularly on the transpacific, could be masking what may turn out to be a long and slow recovery for the container sector. “The container shipping industry is particularly vulnerable to changes in consumer spending, which has been severely impacted by lockdowns across the world,” BIMCO chief shipping analyst Peter Sand said in his latest outlook for the sector. While volumes were hit hardest in April and May, in line with the strict lockdowns in place at the time, over the first half of the year liftings were down 6.9%.

“Though volumes have started to recover, actual demand for goods is still considerably down,” Mr Sand said. “The high rates are testament to shippers again frontloading their goods, this time ahead of a potential second wave of coronavirus around the world and resulting lockdowns.” While frontloading occurred ahead of an increase in tariffs because of the trade war in 2018, total retail sales in the US, excluding food and beverages, were down 1.3% in the first six months of this year and there the risks of higher unemployment and lower consumer incomes are looming as governments unwind state support programmes.

“Even the higher state support was unable to stop consumer spending falling in the major consuming nations of the world, and, as this comes to an end, spending is likely to suffer even more, lowering demand for container shipping,” Mr Sand said. “The effects of this lower actual demand on container shipping will be more painful given the frontloading that we are currently seeing, which will depress volumes and freight rates in the future."

BIMCO said while new housing starts in the US, a signal of economic confidence, were higher than they were a few months ago, they still remained 4.5% below where they were in February this year. Despite capacity now being close to or above last year's levels, and although demand remains low, container freight rates remained resilient, which had helped carriers to the achieve their most profitable second quarter results since 2010. "Across the board, major carriers have announced strong results for the first half of the year, despite volumes falling," Mr Sand said. "This has so far been achieved by the stable freight rates and the cost savings from cheaper bunkers, blanking sailings, and returning ships to tonnage providers."

But capacity management had been the key to success and as capacity is reinstated without a permanent recovery in demand, carriers would find themselves balancing on a "thin tightrope" between maintaining market share and freight rates. This would happen while the fundamental balance in the market deteriorated as the fleet grew by 2% and demand falls, said Mr Sand. "BIMCO expects freight rates to fall in the near future unless capacity adjustments are constantly made to rebalance the market."

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

US container imports surge

Demand rebounds in July and August as economy continues recovery and retailers stock up for the winter holiday season, but analysts caution that some of the volumes are to replenish depleted inventories. US container imports surged to "unexpected" high levels this summer and may have hit a new record, as the US economy continues to reopen and retailers stock up for the holiday season, according to the monthly Global Port Tracker report by the National Retail Federation (NRF) and Hackett Associates.

US ports covered by Global Port Tracker handled 1.92 million TEU in July, the latest month for which after-the-fact numbers are available. That was down 2.3%, year-over-year, but up 19.3% from June and significantly higher than the 1.76 million TEU forecast a month ago. Those figures are consistent with a recent *Lloyd's List* survey of nine leading US ports, which showed a collective 19.5% uptick in containerised imports for July. According to the Global Port Tracker, August's US import volumes are estimated at 2.06 million TEU, a 6% year-over-year increase. Actual August numbers won't be known until next month, but that would be an all-time high, beating the previous record of 2.04 million TEU set in October 2018, the report noted.

September is forecast at 1.89 million TEU, up 1.1%, year over year; October at 1.71 million TEU, down 9.2%; November at 1.58 million TEU, down 6.8%, and December at 1.53 million TEU, down 11%. Those numbers would bring 2020 to a total of 20.1 million TEU, a drop of 6.7% from last year, still the lowest annual total since 19.1 million TEU in 2016. The first half of 2020 totalled 9.5 million TEU, down 10.6% from last year. The forecast estimates volumes of 7.58 million TEU during the July-October "peak season" when retailers rush to bring in merchandise for the winter holidays, making 2020 the third-busiest peak season on record following 7.7 million TEU in 2018 and 7.66 million TEU last year, the report noted. January 2021 is forecast at 1.6 million TEU, down 12% from January 2020.

<u>Caution urged</u>

Despite the apparent improvement in import confidence, NRF vice president for Supply Chain and Customs Policy, Jonathan Gold said the figures should be viewed with some caution, noting: "It's important to be careful how much to read into these numbers after all we've seen this year, but retailers are importing far more merchandise for the holidays than we expected even a month ago. "Some of these imports are helping replenish inventories that started to run low after consumers unleashed pent-up demand when stores reopened. But this is the clearest sign yet that we could be in for a much happier holiday season than many had thought." Hackett Associates founder Ben Hackett said: "The economy has come into sharp focus, and for good cause. The previous yo-yo pattern of import levels reached a peak in July that appears to have extended into August. Nonetheless, data from around the globe is a mix, with a weak recovery as Europe struggles with rising COVID-19 numbers; but China's exports remain solid.

High uncertainty

"Will this last? A lot of uncertainty is in play." Global Port Tracker, which is produced for NRF by the consulting firm Hackett Associates, provides historical data and forecasts for the US ports of Los Angeles/Long Beach, Oakland, Seattle and Tacoma on the West Coast; New York/New Jersey, Port of Virginia, Charleston, Savannah, Port Everglades, Miami and Jacksonville on the East Coast, and Houston on the Gulf Coast. As reported in Lloyd's Loading List, shipping association BIMCO this week warned that the recent rebound in ocean freight volumes, particularly on the transpacific, could be masking what may turn out to be a long and slow recovery for the container sector.

"The container shipping industry is particularly vulnerable to changes in consumer spending, which has been severely impacted by lockdowns across the world," BIMCO chief shipping analyst Peter Sand said in his latest outlook for the sector. While volumes were hit hardest in April and May, in line with the strict lockdowns in place at the time, over the first half of the year liftings were down 6.9%.

Underlying demand weak

"Though volumes have started to recover, actual demand for goods is still considerably down," Sand said. "The high rates are testament to shippers again frontloading their goods, this time ahead of a potential second wave of coronavirus around the world and resulting lockdowns." While frontloading occurred ahead of an increase in tariffs because of the trade war in 2018, total retail sales in the US, excluding food and beverages, were down 1.3% in the first six months of this year and there the risks of higher unemployment and lower consumer incomes are looming as governments unwind state support programmes.

"Even the higher state support was unable to stop consumer spending falling in the major consuming nations of the world, and, as this comes to an end, spending is likely to suffer even more, lowering demand for container shipping," Sand said. "The effects of this lower actual demand on container shipping will be more painful given the frontloading that we are currently seeing, which will depress volumes and freight rates in the future." BIMCO said while new housing starts in the US, a signal of economic confidence, were higher than they were a few months ago, they still remained 4.5% below where they were in February this year.

Rates remain resilient

Despite capacity now being close to or above last year's levels, and although demand remains low, container freight rates remained resilient, which had helped carriers to the achieve their most profitable second quarter results since 2010. "Across the board, major carriers have announced strong results for the first half of the year, despite volumes falling," Sand said. "This has so far been achieved by the stable freight rates and the cost savings from cheaper bunkers, blanking sailings, and returning ships to tonnage providers."

But capacity management had been the key to success and as capacity is reinstated without a permanent recovery in demand, carriers would find themselves balancing on a "thin tightrope" between maintaining market share and freight rates. This would happen while the fundamental balance in the market deteriorated as the fleet grew by 2% and demand falls, said Sand. "BIMCO expects freight rates to fall in the near future unless capacity adjustments are constantly made to rebalance the market."

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

Chinese authorities suggest trans-Pacific carriers add more capacity

Chinese authorities have suggested to major container lines that they inject more capacity and less aggressively raise rates in the trans-Pacific trade as spot rates hit highs, adding an entirely new element to an already volatile market, carriers and forwarders tell JOC.com. The ministry of transportation and communications gave the guidance to a group of major carriers at a Shanghai meeting where new capacity reporting requirements were discussed. Two container lines executives — one with a Europe-based and the other with an Asia-based carrier — said Cosco Shipping has agreed to suspend a Sept. 15 general rate increase. Cosco's decision to suspend the GRI is being shared with its customers, according to two forwarders and one forwarder's advisory of the GRI suspension to costumes.

Container lines' ability to adjust trans-Pacific capacity has been key to lifting their profits despite lower global container volumes. Carriers enjoyed their most profitable second quarter since 2010, posting a total profit of $2.7 billion, according to the latest Sunday Spotlight report from Sea-Intelligence Maritime Analysis.
If carriers do in fact heed Chinese regulators' direction, "it would be an unprecedented impact on the market, and more worryingly, potentially derail the carriers' ability to manage capacity in the face of extreme demand volatility," said Lars Jensen, CEO and partner at SeaIntelligence Consulting. "Placing a ban on blank sailings is essentially a non-issue right now in a tight market, but it is highly likely we will see another downturn ahead of us, and if carriers are barred from managing capacity, this becomes problematic."

In what is still very much of an evolving scenario, carriers are digesting what they were told by the Chinese government and how it will impact their businesses going forward. Unlike the European Union, which declined to impose additional requirements on alliances in renewing the bloc exemption for consortia for five years last fall, China can act swiftly and create major market impact, as it did in 2014 when it shocked the industry by rejecting the proposed P2 alliance of Mediterranean Shipping Co., Maersk and CMACGM. MSC and Maersk ultimately created the 2M alliance, while CMA CGM joined the Ocean Alliance with Cosco, OOCL, and Evergreen.

In an interview with JOC.com, Jensen said that the reported capping of spot rates by Chinese authorities would have limited impact on the market, considering that spot rates were unlikely to remain at their current levels much longer anyway. More relevant is the question of how Chinese authorities would address capacity management in practice, as carriers' ability to swiftly withdraw capacity to meet lower volumes in the second half will be key to their newfound profitability which was based on doing precisely that in the first half, he said.

"I as a carrier can either have a scheduled service and I end up blanking half of the sailings, or I say I have no service, but I ad hoc put in extra loaders. It's the same effect," Jensen said, suggesting capacity could be difficult even for China to effectively regulate in practice. "Thus, this could range from a non-issue to something that is destabilizing if suddenly the carriers aren't able to effectively manage capacity. Capacity management as we have seen in 2020 is absolutely pivotal to carriers financial health."

Eastbound container line spot rates from Shanghai to the US West Coast rose 1.5 percent from the prior week to $3,813 per FEU, hitting yet another new record after six straight weeks of increases, according to the latest reading of the Shanghai Containerized Freight Index (SCFI), as published on the JOC Shipping and Logistics Pricing Hub. Container spot rates from Asia to the West Coast are up 163 percent from a year ago.
Pricing to the East Coast dipped 0.1 percent on a sequential basis to $4,534 FEU, but was still up 80 percent from the same week last year, according to the SCFI.

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 4 September 2020	Current Index 11 September 2020
Comprehensive Index			1320.8	1355.04
Service Routes				
Europe (Base port)	USD/TEU	20%	1042	1054
Mediterranean (Base port)	USD/TEU	10%	1082	1115
USWC (Base port)	USD/FEU	20%	3758	3813
USEC (Base port)	USD/FEU	7.50%	4538	4534
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	909	960
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	1250	1315
East/West Africa (Lagos)	USD/TEU	2.50%	2937	3105
South Africa (Durban)	USD/TEU	2.50%	1217	1416
South America (Santos)	USD/TEU	5.00%	2223	2901
West Japan (Base port)	USD/TEU	5.00%	231	232
East Japan (Base port)	USD/TEU	5.00%	238	238
Southeast Asia (Singapore)	USD/TEU	7.50%	148	134
Korea (Pusan)	USD/TEU	2.50%	118	118

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