

การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 35 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	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	300	450		
(North & South)	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		
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
Thailand - US East Coast	3,600	4,500		
	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

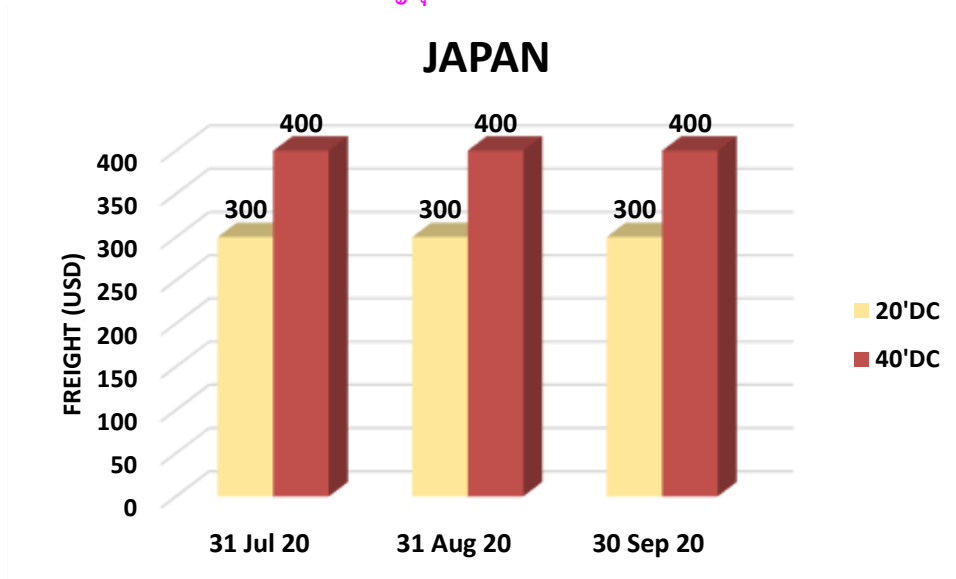
ส่วนเส้นทางที่ค่าระวางปรับเพิ่มขึ้น ได้แก่ เส้นทาง Australia ค่าระวางปรับเพิ่มขึ้น 50 USD/TEU โดยเรียกเก็บอยู่ระหว่าง 675-775 USD/TEU และ 1,350-1,500 USD/FEU และเรียกเก็บค่า FAF ในอัตรา 6 USD/TEU ในขณะที่เส้นทาง Europe มีการปรับเพิ่มการเรียกเก็บค่า Peak Season Surcharge (PSS) ในอัตรา 150 USD/TEU (ซึ่งสามารถเจรจาต่อรองได้)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

กัณยาน 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

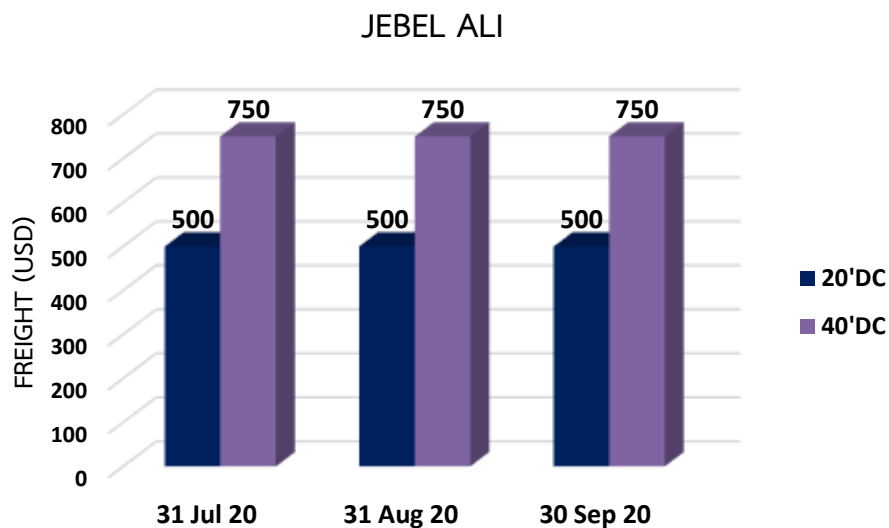


Subject to Low Sulphur Surcharge (July): USD 17/TEU และ USD 34/FEU

(Aug.): USD 9/TEU และ USD 17/FEU

(Sep.): USD 17/TEU และ USD 34/FEU

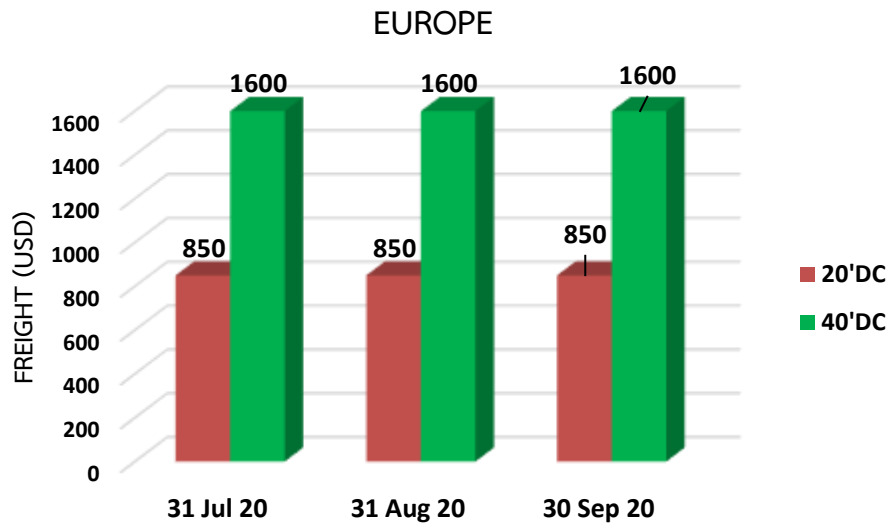
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-Jebel Ali** เดือน ก.ค. ถึง ก.ย. ปี 2563



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

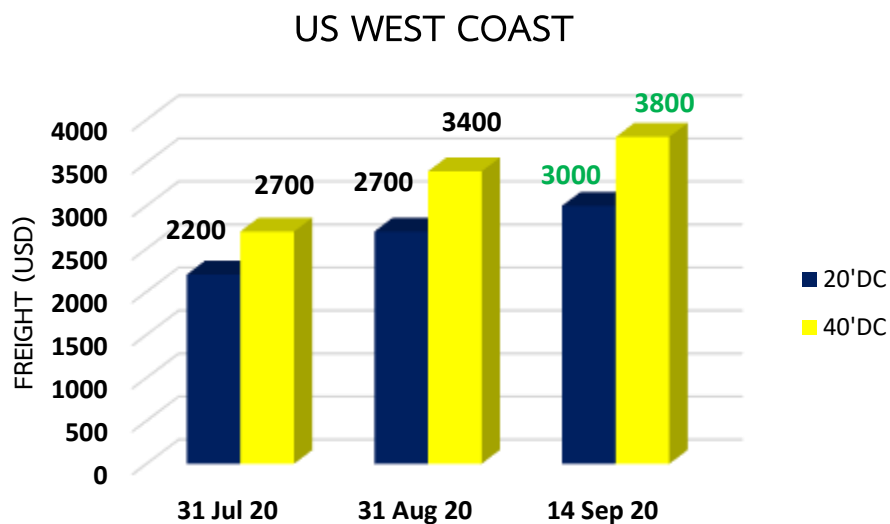
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน ก.ค. ถึง ก.ย. ปี 2563



Subject to

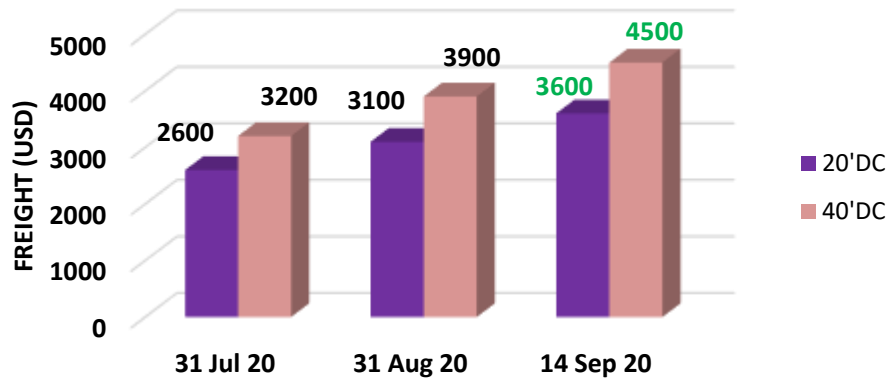
- ENS: USD30/BL
- ISOCC (July - Sep.): USD53/TEU และ USD106/FEU
- PSS (Sep.): USD150/TEU และ USD 300/FEU

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 Hapag Lloyd

- ประกาศอัตราการเรียกเก็บค่า General Rate Increase (GRI) สำหรับสินค้าจากเส้นทาง East Asia ไปยังเส้นทางต่างๆ ดังนี้

Routing	General Rate Increase (GRI)	
	Effective 1-Sep-2020	Effective 15-Sep-2020
To East Coast South America	USD 1,000/Container	USD 1,200/Container
To Mexico, Central America, West Coast South America, Caribbean and Panama	Effective 14-Sep-2020	
	USD 1,500/Container	
To USA & Canada	Effective 15 Aug-Oct 2020	
	USD 960/TEU, USD 1,200/FEU	

สายเรือ Wan Hai

- ประกาศปรับการเรียกเก็บค่า Wan Hai Bunker Surcharge (WBS) ระหว่างวันที่ 1 ตุลาคม ถึง 31 ธันวาคม 2563 ดังตาราง

WBS Matrix(per TEU/standard dry container)

Trade	Bound	≤\$300	\$300.01-350	\$350.01-400	\$400.01-450	\$450.01-500	\$500.01-550	\$550.01-600	\$600.01-650	\$650.01-700	\$700.01-750
Intra-Asia	Region A	4	8	16	24	32	40	48	56	64	72
	Region B	8	15	30	45	60	75	90	105	120	135
Asia - India Sub continent	WB	16	33	65	98	130	163	195	228	260	293
	EB	8	17	33	49	65	81	98	114	130	146
Asia - Middle East	WB	18	35	70	105	140	175	210	245	280	315
	EB	9	18	35	53	70	88	105	123	140	158
Asia - Red Sea	WB	20	40	80	120	160	200	240	280	320	360
	EB	6	12	24	36	48	60	72	84	96	108
Asia - South America West Coast	EB	27	55	109	164	218	273	327	382	436	491
	WB	8	17	33	49	65	82	98	114	131	147

WBS Matrix(per TEU/Reefer container)

Trade	Bound	≤\$300	\$300.01-350	\$350.01-400	\$400.01-450	\$450.01-500	\$500.01-550	\$550.01-600	\$600.01-650	\$650.01-700	\$700.01-750
Intra-Asia	Region A	6	12	24	36	48	60	72	84	96	108
	Region B	12	23	45	68	90	113	135	158	180	203
Asia - India Sub continent	WB	24	50	98	146	195	244	293	341	390	439
	EB	12	26	49	73	98	122	146	171	195	219
Asia - Middle East	WB	27	53	105	158	210	263	315	368	420	473
	EB	14	27	53	79	105	131	158	184	210	236
Asia - Red Sea	WB	30	60	120	180	240	300	360	420	480	540
	EB	9	18	36	54	72	90	108	126	144	162
Asia - South America West Coast	EB	41	83	164	245	327	409	491	572	654	736
	WB	12	26	49	74	98	123	147	172	196	221

POD/POL	JPN	KOR	N.PRC	E.PRC	S.PRC	HKG	TWN	PHL	Hai Phong	S.VNM	KHM	THA	SGP	MYS	IDN	MMR
JPN		A	A	A	A	A	A	B	B	B	B	B	B	B	B	B
KOR	A		A	A	A	A	A	B	B	B	B	B	B	B	B	B
N.PRC	A	A				A		B	B	B	B	B	B	B	B	B
E.PRC	A	A				A		A	B	B	B	B	B	B	B	B
S.PRC	A	A				A		A	A	A	A	B	B	B	B	B
HKG	A	A	A	A	A		A	A	A	A	A	B	B	B	B	B
TWN	A	A				A		A	A	A	A	B	B	B	B	B
PHL	B	B	B	A	A	A	A		A	A	B	B	A	B	B	B
Hai Phong	B	B	B	B	A	A	A	A			A	A	A	B	B	B
S.VNM	B	B	B	B	A	A	A	A			A	A	A	A	A	B
KHM	B	B	B	B	A	A	A	B	A	A		A	A	A	A	B
THA	B	B	B	B	B	B	B	B	A	A	A		A	A	A	B
SGP	B	B	B	B	B	B	B	A	A	A	A	A		A	A	A
MYS	B	B	B	B	B	B	B	B	B	A	A	A	A		A	A
IDN	B	B	B	B	B	B	B	B	B	A	A	A	A	A		A
MMR	B	B	B	B	B	B	B	B	B	B	B	B	A	A	A	

- ประกาศปรับการเรียกเก็บค่า Tariff Bunker Charge สำหรับเส้นทางทรานส์แปซิฟิก โดยมีผลตั้งแต่วันที่ 1 ตุลาคม ถึง 31 ธันวาคม 2563 มีรายละเอียดดังนี้
 - สินค้านำเข้าไปยัง US West Coast: USD 205/TEU, USD 260/FEU และ USD 290/40'HQ
 - สินค้าส่งออกจาก US West Coast: USD 50/TEU และ USD 65/FEU, 40'HQ

สายเรือ CNC

- ประกาศแจ้งการเรียกเก็บค่า Low Sulphur Surcharge (LSS) ในเส้นทาง Intra-Asia สำหรับเดือนตุลาคม 2563 ดังตาราง

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	Long	Long	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	

Ocean freight recovering faster than expected

Hapag-Lloyd CEO expects rebound to continue through the third and fourth quarters of this year and is planning for volumes next year similar to 2019 levels – if there is no further major Covid-19 downturn. Container markets will likely continue to bounce back through the third and fourth quarters of this year and return to 2019 levels next year as the recovery from Covid-19 lockdowns continues, according to Rolf Habben Jansen, CEO of Hapag-Lloyd.

The Germany-based container line, now the world's fifth largest container line by capacity, saw second quarter profits surge on higher freight volumes and lower fuel costs despite reporting year-on-year volume declines. Speaking in a Q&A webinar earlier this week, Habben Jansen said carriers had benefitted from demand recovering quicker than idled capacity could be reintroduced. "It was not quite as bad as we expected or feared," he said. "We saw a very sharp decline of volumes, especially in the months of April and May. But we have seen quite a decent recovery when we look at the last six to eight weeks. Volumes are probably stronger than we all expected."

Trade upgrades

Hapag-Lloyd has had to rapidly upgrade its container trade volume forecasts for 2020 from the "double-digit percentage" declines expected just a few months ago. "I wouldn't be surprised if, in the end, we come out a little bit better than -7.2% [compared to 2019] and end up around about -5% or something like that." He said the supply-demand capacity balance was now favourable for lines, with the orderbook to fleet ratio down to 9%, its lowest level for more than a decade. And, he said the idled fleet has also fallen rapidly from its peak in May when around 2.7m TEU were laid up, to around of 5.1% of the world fleet, or 1.2m TEU in capacity terms.

"I would think it's actually probably going to go down even further," added Habben Jansen. "So that means we're getting back to a to a pretty much normal level, as there will always be some ships idle – either

because they are just waiting for the voyage or because it's small tonnage, of which there is plenty, or because they are in dry dock or undergoing, for example, a retrofit. "I think we're getting to a fairly normal situation, probably sooner than many of us expected. We've definitely been seeing over the last six to eight weeks that we've had to scale back up again quite quickly in response to quite an unexpected and strong recovery in demand."

Trans-Pac soaring on retailer resilience

He said the recovery in demand had been particularly robust on the trans-Pacific, where rates have been surging to record levels, and on the Asia-Europe front haul trade where rates have also been rising, albeit, less dramatically. He said US retailer demand had been "remarkably" resilient and this had been reflected in the latest quarterly results of the largest retailers. "Their outlooks for Q3 and Q4 remain fairly optimistic, which seems to indicate that the likelihood that things will be falling off a cliff over the upcoming weeks or months is probably a lot lower than many had feared some time ago," he added.

Outlook 2021

As for how 2021 develops, Habben Jansen was not overly optimistic. "I remain a little bit cautious there, because it is very difficult to envision," he said. "If we look at the number of [coronavirus] cases that we still see globally around the world and we see also how certain sectors have been hit, then I think it's quite unlikely that this will not have an effect on the global economy – even if today we see quite a lot of support through government programmes. Those in many cases will run out. So, I personally plan with a volume in 2021 which is probably around what we saw in 2019, which is probably a tad better than what most of the experts say these days."

Second-half recovery

As reported earlier this week, analysis by Sea-Intelligence suggests that global ocean freight volumes may return to year-on-year growth in August and September, with the improving demand outlook for the second half of the year also expected to lead to higher profits for container lines compared with last year. Sea-Intelligence's forecasts use modelling to predict medium-term global ocean freight volume changes, using the planned capacity supply or service cancellations of carriers as an indicator of the underlying volume developments – methodology that it claims has closely tracked actual volume developments, "as seen during the pandemic from February to June".

Its method indicates that although global container volumes are expected to show a decline in July, year over year (Y/Y), "we are looking at a prospective Y/Y growth in August and September. For the entire third quarter, we expect a Y/Y demand contraction, but by a marginal -0.1%, pulled down by the developments in July," Sea-Intelligence said.

Alan Murphy, CEO of Sea-Intelligence, commented: "While this may seem counter-intuitive in a pandemic, there are some factors that we believe are at play here. First is a shift in consumption patterns away from services to physical goods, which would give rise to a need for stockpiling a large volume of goods different to what were previously sold. Second, restrictions of traveling and regular outings would potentially fund a higher spending on consumer products. Lastly, a change in working conditions necessitating a work-from-home approach has also driven consumer behaviour towards purchases for furnishing home offices."

Although there are no reliable global figures yet for overall container market volume developments in July and August, anecdotal reports indicate that the transpacific market has returned to volume growth since June or July. A representative of one container line last week told *Lloyd's Loading List*: "We have started to bring ships back to the market since the US demand began to pick up, and our transpacific capacity since June has represented a year-on-year growth."

Alphaliner said carriers were already reinstating previously blanked sailings on the transpacific market but had still managed to hold rates firm. Spot rates on the North China to US west coast trade have surged to a historic high – about 120% higher than the year-ago level – despite the capacity restoration, according to the consultancy. “The combination of higher rates and neutral or expanded capacity indicates strong consumer demand, with Chinese exporters wanting to ship as much product as possible before a potential second coronavirus wave,” it said.

Tan Hua Joo, an independent market analyst, said the current bullishness on the transpacific market was entirely driven by demand. “The strong demand, which will continue until at least September, has been driven mainly by the US stimulus bill and – to a smaller extent – by some front loading for the August deadline for tariff exclusion for certain goods,” said Tan.

But in his view, the return of transpacific market capacity to its normal seasonal level didn’t happen until July. “Capacity year-on-year only became positive in late July after it became clear that demand is stronger than market expectations and the blanked sailing programmes have almost all been reversed on both the US west coast and east coast, based on data that I have collected,” Tan noted.

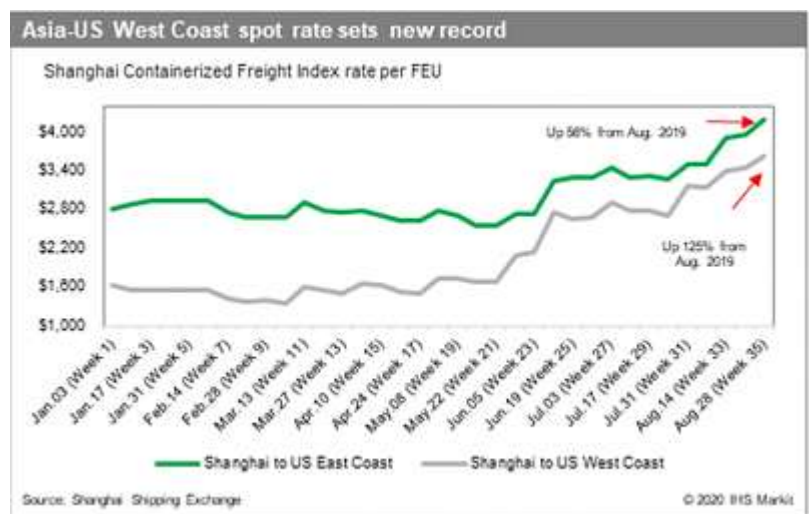
Source: <https://www.lloydsloadinglist.com/>

E-commerce changing peak-season shipping patterns

Freight forwarders and logistics experts are now predicting that US imports will remain at elevated levels at least through October, fueled primarily by e-commerce fulfillment and a steady flow of personal protective equipment (PPE). Non-vessel-operating common carriers (NVOs) told JOC.com this week the continued surge in imports will push the already record-high spot rates in the eastbound trans-Pacific even higher. As of Aug. 28, the Asia–US West Coast rate reached \$3,639 per FEU, up 5.8 percent from the previous week’s record high and 125.3 percent from the same week in 2019, according to the Shanghai Containerized Freight Index (SCFI), published in the JOC Shipping & Logistics Pricing Hub. The rate from China to the US East Coast stood at \$4,207 per FEU, up 6.4 percent from last week and 56.3 percent year over year.

Earlier this month, NVOs were predicting that the import surge that began in late June would last at least through September. Now they are extending that timeline, based on continued growth in e-commerce fulfillment, as shoppers favor online shopping during the COVID-19 crisis. “We can see demand strength through October,” Jon Monroe, a consultant to NVOs, said in his weekly newsletter on Wednesday. PPE shipments, which contributed to the surge in July, remain strong due to large-volume purchases by federal and state governments, he said.

However, e-commerce fulfillment is also playing an important role in the import surge. Consumers are shopping online for a broad range of merchandise, more than replacing the weakness in in-store purchases due to COVID-19. Analysts say the growing role of e-commerce imports could be changing the timing of peak-season shipping patterns in the eastbound trans-Pacific. “E-commerce is



replacing in-store shopping. The entire Black Friday shopping scene ain't going to happen," a transportation consultant and former logistics executive for national retailers told JOC.com.

However, the same consultant, who asked not to be identified, noted that some big-box retailers are still replenishing inventory that was burned off when the US emerged from COVID-19 lockdowns. Those retailers are ordering both for e-commerce fulfillment and for the restocking of inventory at the stores. "There are still a lot of stores that are low on replenishment," he said.

Imports may stay strong for rest of year

NVOs do not have a clear view of demand beyond October, but purchase orders placed with factories in China may point to the strength in US imports continuing until the end of the year. Monroe cited a recent survey of factories in China conducted by Nansha Port, which found that purchase orders were strong for the rest of 2020. "End of the year? It could very well be," Monroe said in his newsletter.

US imports from Southeast Asia, especially Vietnam, continue to set records. Nerijus Poskus, global head of ocean freight at Flexport, told a webcast Wednesday that imports from Vietnam in July were up 39 percent from June. July was the best month ever for imports from Vietnam through the West Coast, he said. In order to meet growing demand for premium services from Vietnam, APL Logistics next week will add Haiphong to the list of Asian ports served by its OceanGuaranteed product., which already included Ho Chi Minh City. Monroe added that the two tightest trade lanes in Asia in terms of vessel capacity are Ho Chi Minh and Yantian, China, to Los Angeles and Long Beach.

Strong US imports from China and Southeast Asia, coupled with weak US exports to Asia, have resulted in equipment shortages in those regions, said Jan Hinz, head of North America and Turkey at Flexport. "There is a significant shortage of equipment in Asia," he said. Hinz advised shippers attending the Flexport webcast to be flexible when shipping from Asia. For example, 40-foot high-cube containers are difficult to secure, so shippers who are turned down for those containers should consider moving their freight in standard 40-foot containers if that's what's available, he said.

Asia-East Coast spot rates also increasing

Strengthening import demand, equipment shortages in Asia, and tight vessel capacity on vessels leaving Asian ports are boosting spot rates in the eastbound trans-Pacific. NVOs told JOC.com last week that carriers are forecasting a rate of \$4,000 per FEU to the West Coast when a Sept. 1 general rate increase (GRI) takes effect next week.

Friday's SCFI reading also indicated that demand for all-water services from Asia to the East Coast is increasing. Normally, the difference between the East Coast and West Coast rate is close to \$1,000 per FEU. However, that gap closed considerably in July as retailers concentrated their imports through the ports of Los Angeles and Long Beach. Imports through the Southern California gateway increased 33.8 percent in July from June, whereas total US imports in July increased only 0.9 percent month-over-month, according to PIERS, a JOC.com sister company within IHS Markit.

The East Coast spot rate on July 31 was \$3,495 per FEU, or only \$328 per FEU higher than the \$3,167 rate to the West Coast. On Friday, the differential had increased to \$568 per FEU, according to the SCFI. East Coast port directors earlier this month told JOC.com their bookings for August were looking strong. Port Logistics Group, which has distribution warehouses on both coasts, said the East Coast facilities are increasingly busy. "Southern California has always been number one, but we're seeing high demand all around the country," said Scott Weiss, vice president of business development at Port Logistics Group. He said the company's warehouses serving Savannah are especially busy.

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

Shippers' ocean freight budgets 'about to explode' as rates hit new highs

Ocean freight budgets for shipments from Asia to the US and Europe are going through the roof as carriers prepare yet another round of freight rate increases. Today's Shanghai Containerized Freight Index (SCFI) recorded further gains for the transpacific and Asia-Europe tradelanes, taking its combined reading up another 7% for the week, to 1,263.26, which is 54% higher than a year ago.

Container spot rates from Asia to the US east coast, as recorded by the SCFI, jumped \$254 per 40ft, to take the rate to \$4,207, well beyond the 2018 trade war high of \$4,000. And rates to the west coast jumped \$198, to \$3,639 per 40ft – another record for the tradelane and a massive 125% higher than recorded for the same week of last year. “Demand was strong enough to push rates up, even with cancelled sailings restored and carriers adding temporary and even new permanent services on the lane,” said Freightos CMO Eytan Buchman. “With reports of rolled shipments and container shortages out of China indicating the extent of the demand rush, carriers will likely introduce another China-US GRI for September, which would be the sixth in just three months,” said Mr Buchman.

In his weekly US import update report, Jon Monroe, president of Jon Monroe Consulting and a representative for Worldwide Logistics, said the big US retailers were “experiencing a major surge in online orders”, and were converting many of their stores to fulfilment centres. He said, however, that the substantial freight price hikes were taking their toll.

“Importers’ budgets are ballooning and, in some cases, about to explode from having to pay the extremely high cost of transport,” said Mr Monroe. “The record high rates will undoubtedly cause bankruptcies in the worst case, and major budget excesses in the best case, scenarios,” he warned. Elsewhere, on the Asia to Europe tradelane, shippers are also up against it with spot rates jumping – albeit not to the extent as on the transpacific – containers being rolled – even on premium rates – and equipment shortages reported at depots.

Carriers on the route are preparing to roll out increased FAK rates on 15 September; for example CMA CGM will add \$200 to the price of taking a 40ft box from Asia to North Europe, to take the rate to \$2,500. But according to a Chinese NVOCC report this week to *The Loadstar*, Maersk's spot rates to from Shanghai North Europe have hit \$2,760 per 40ft. “And even when you pay these rates, there is a two-to-three-week delay before shipment,” said the contact. Maersk Spot and premium products from other carriers are now being quoted significantly higher than the market spot rate.

The North Europe component of the SCFI recorded a further 10% increase this week, to take the spot rate to \$1,029 per teu, while rates to Mediterranean ports moved ahead another 6% to \$1,060 per teu.

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 21 August 2020	Current Index 28 August 2020
Comprehensive Index			1183.87	1263.26
Service Routes				
Europe (Base port)	USD/TEU	20%	937	1029
Mediterranean (Base port)	USD/TEU	10%	996	1060
USWC (Base port)	USD/FEU	20%	3440	3639
USEC (Base port)	USD/FEU	7.50%	3953	4207
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	796	837
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	1107	1213
East/West Africa (Lagos)	USD/TEU	2.50%	2684	2837
South Africa (Durban)	USD/TEU	2.50%	872	1064
South America (Santos)	USD/TEU	5.00%	1367	1878
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%	133	132
Korea (Pusan)	USD/TEU	2.50%	118	118

ตารางเปรียบเทียบอัตราค่าระวางระหว่าง Shanghai และประเทศไทย ไปเส้นทางต่างๆ

Route	Freight Rate (SCFI)			Freight Rate from Thailand		
	Freight Rate (31 Jul 2020)	Freight Rate (28 Aug 2020)	Change	Freight Rate from Thailand (31 Jul 2020)	Freight Rate from Thailand (31 Aug 2020)	Change
Europe	901	1029	128	903	903	0
US West Coast	3167	3639	472	2200	2700	500
US East Coast	3495	4207	712	2630	3130	500
Dubai	751	837	86	558	558	0
Melbourne	1082	1213	131	450-600	625-725	125-175
West Japan	229	231	2	317	309	-8
East Japan	238	238	0			
Busan	117	118	1	100	100	0

จากตารางข้างต้น เป็นการเปรียบเทียบอัตราค่าระวาง ในช่วงปลายเดือนกรกฎาคม และช่วงปลายเดือนสิงหาคม โดยมีรายละเอียดดังนี้

1. อัตราค่าระวางจากประเทศจีน ไปเส้นทางต่างๆ โดยใช้ข้อมูลอ้างอิงจาก Shanghai Containerized Freight Index (SCFI)
2. อัตราค่าระวางจากประเทศไทย ไปเส้นทางต่างๆ โดยอ้างอิงจากการรวบรวมข้อมูลของสภาผู้สินค้าทางเรือแห่งประเทศไทย

เมื่อทำการเปรียบเทียบอัตราค่าระวางจากประเทศจีนไปยังเส้นทางต่างๆ พบว่าอัตราค่าระวางปรับเพิ่มขึ้นในเกือบทุกเส้นทาง ได้แก่ เส้นทางยุโรป เส้นทางสหรัฐอเมริกาฝั่งตะวันตก และฝั่งตะวันออก เส้นทางดูไบ เส้นทางออสเตรเลีย เส้นทางญี่ปุ่นฝั่งตะวันตก และเส้นทางเกาหลี มีเพียงเส้นทางญี่ปุ่นฝั่งตะวันออกที่อัตราค่าระวางคงที่

สำหรับอัตราค่าระวางจากประเทศไทยไปยังเส้นทางต่างๆ เส้นทางที่อัตราค่าระวางยังไม่มีการเปลี่ยนแปลง ได้แก่ เส้นทางยุโรป เส้นทางดูไบ และเส้นทางเกาหลี ในขณะที่เส้นทางที่อัตราค่าระวางปรับเพิ่มขึ้น ได้แก่ เส้นทางสหรัฐอเมริกาฝั่งตะวันตก และฝั่งตะวันออก และเส้นทางออสเตรเลีย ส่วนเส้นทางที่อัตราค่าระวางปรับลดลง ได้แก่ เส้นทางญี่ปุ่น

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