การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 33 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 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	Subject to ISOCC USD 6/TEU, USD 11/FEU	
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			
Thailand - Jebel Ali	500	750	Subject to ISOCC USD 23/TEU, USD 46/FEU	
	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, USD106/FEU	
	Subject to ENS USD30/BL			
Thailand - US West Coast	2,700	3,400	-	
Thailand - US East Coast	3,100	3,900		
	Subject to Panama Low Water USD 30/Container			

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

สถานการณ์ค่าระวางในช่วงเดือนสิงหาคม 2563 อัตราค่าระวางในเส้นทางเอเชียคงที่ไม่มีการเปลี่ยนแปลง 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

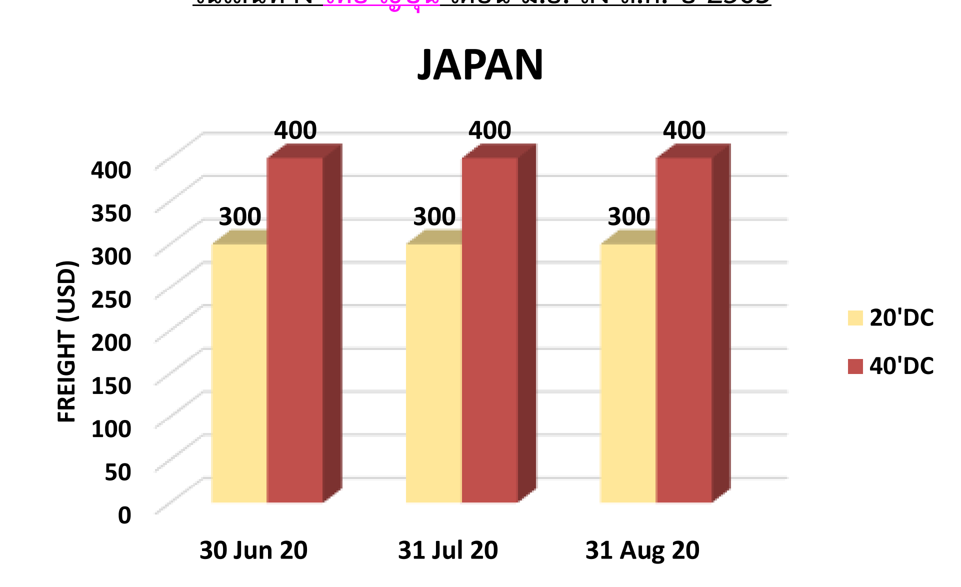
สำหรับเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนหลังของเดือนสิงหาคม ค่าระวางปรับเพิ่มขึ้น 150 USD/TEU และ 250 USD/FEU ทำให้ค่าระวางฝั่ง West Coast อยู่ที่ 2,700 USD/TEU และ 3,400 USD/FEU ในขณะที่ฝั่ง East Coast ค่าระวาง

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)

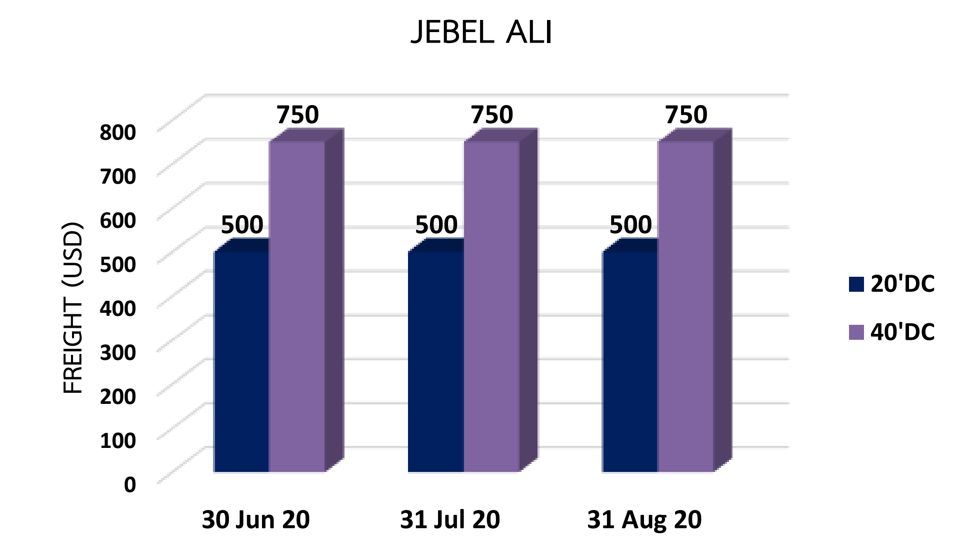
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20’	USD/40’		
Thailand-Hong Kong	700	800	USD 15/TEU, USD 30/FEU	Effective till 31-Aug-2020
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	900	1,200	-	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,500-1,550	1,900-2,000	-	

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

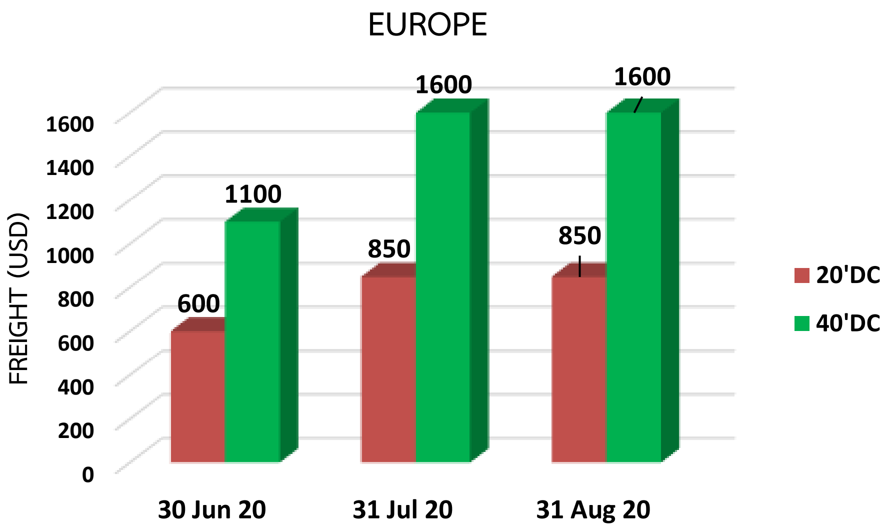
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต ในเส้นทาง ไทย-Jebel Ali เดือน มิ.ย. ถึง ส.ค. ปี 2563



Subject to

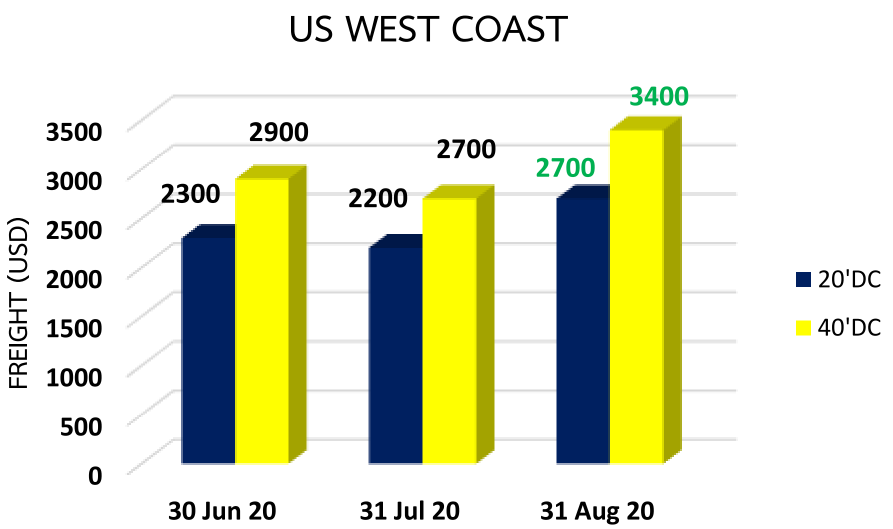
- War Risk Surcharge: USD35/TEU และ USD70/FEU
- Low Sulphur Surcharge (Jun.): USD101/TEU และ USD202/FEU
  (July & Aug.): USD23/TEU และ USD46/FEU

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

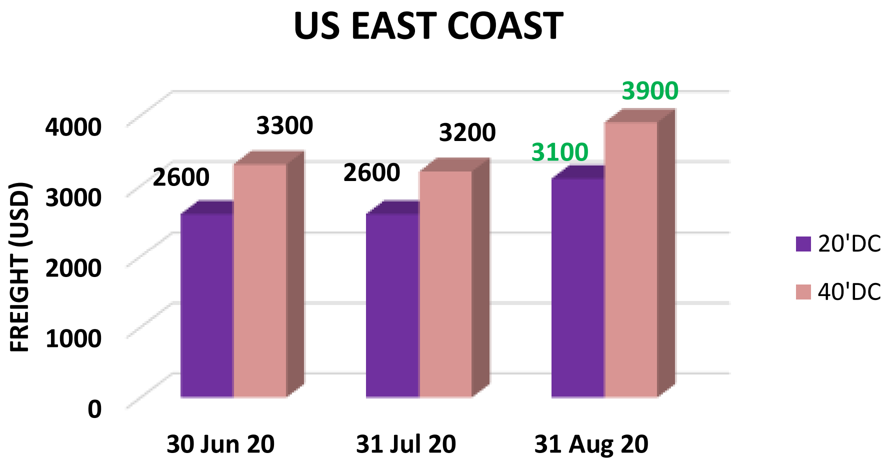


Subject to
- ENS: USD30/BL
- ISOCC (Jun.): USD177/TEU และ USD354/FEU
  (July & Aug.): USD53/TEU และ USD106/FEU

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 East Asia ไปยัง East Coast South America ดังตาราง

Routing	General Rate Increase (GRI) Effective 1-Sep-2020
East Asia to East Coast South America	USD 1,000/Container

'US box imports set for 'bearish end to 2020'

Container spot rates on the trans-Pacific trade remain buoyant even as volumes falter and import forecasts deteriorate. US box imports are expected to surge in August but still fall far short of previous peak summer shipping seasons, according to the monthly Global Port Tracker report. The report, produced by the National Retail Federation and Hackett Associates, expects U.S. imports at major retail container ports to peak this summer in August at 1.81 million TEU. However, although this would be up from the 1.76 million TEU figure estimated for July, it would still be 7.3% lower than throughput in August 2019.

"August is expected to be the busiest month of the July-October 'peak season' when retailers rush to bring in merchandise for the winter holidays," said the report. "But with retailers ordering less merchandise, the month's total would be the lowest peak for the season since 1.73 million TEU in 2016 and falls far short of the 1.96 million TEU peak in 2019. Peak season usually includes the busiest month of the entire year, but this year that was likely January's 1.82 million TEU."

As reported in Lloyd's Loading List, even though container volumes on trans-Pacific the trade are down year-on-year, freight rates remain far ahead of those levied on shippers in 2019 as lines have carefully rationed capacity through the COVID-19 pandemic. Drewry recorded a 4% increase in spot freight rates on the Shanghai to New York trade last week, while spot freight rates on the Shanghai to Los Angeles rose 3% ($90) to reach $2,934 per FEU, up a staggering 82% higher than a year ago. Much the same trend has continued this week, according to Freightos. The marketplace recorded a 5.53% weekly increase on the Freightos Baltic

China/East Asia to North America East Coast 40’ container index in the week ending 9 August, and a 8.95% weekly surge on its Freightos Baltic China/East Asia to North America West Coast 40’ container index.

“The economy is recovering but retailers are being careful not to import more than they can sell,” said NRF Vice President for Supply Chain and Customs Policy Jonathan Gold. “Shelves will be stocked, but this is not the year to be left with warehouses full of unsold merchandise. “The more Congress does to put spending money in consumers’ pockets and provide businesses with liquidity, the sooner we can get back to normal.” US ports covered by Global Port Tracker handled 1.61 million TEU in June, the latest month for which after-the-fact numbers are available. That was up 4.9% from May but down 10.5% year-over-year.

July is estimated at 1.76 million TEU, down 10.2% year-over-year. August is forecast at 1.81 million TEU, 7.3% lower than a year earlier, while September volumes are expected to total 1.69 million TEU, down 9.5%. October throughput is forecast at 1.69 million TEU, down 10.4%; November at 1.59 million TEU, down 5.8% and December at 1.56 million TEU, down 9.6%. “Those numbers would bring 2020 to a total of 19.6 million TEU, a drop of 9.4% from last year and the lowest annual total since 19.1 million TEU in 2016,” said the report. “The first half of 2020 totalled 9.5 million TEU, down 10.1% from last year.”

Hackett Associates' founder, Ben Hackett, said: “This year, peak season seems to have been thrown off by the coronavirus pandemic along with just about everything else we consider normal. “We’ve probably already had our busiest month. And with the pandemic taking a hit on the economy ever since then, peak season is likely to be a disappointment by comparison.”

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

Logistics technology reshapes trade finance for shippers, suppliers

Technology is reshaping the nature of how buyers and sellers of goods finance their transactions, and logistics processes are serving as the foothold for opportunities on both the shipper and financier sides of the equation. The macro trend of allowing sellers to get paid faster and buyers to hold on to capital longer has been playing out for years, but is moving into overdrive during the COVID-19 pandemic as demand for products strains suppliers in their production process and working capital needs for importers. What’s more, trade flows are shifting in a way that will necessitate more — and smaller — suppliers in Asia gaining access to cheaper capital in the years ahead.

According to UK-based banking and financial services firm Standard Chartered, Asia is expected to account for 40 percent of global trade flows by 2027, up from 34 percent in 2010. “The major regions trading with Asia — like the US, Europe, and Africa — are expecting a slowdown, driving contraction in trade volumes along these corridors,” Michael Sugirin, head of open account and trade implementation at Standard Chartered, told JOC.com. “In Asia, even though SMEs [small and medium enterprises] make up 42 percent of the region’s GDP and are responsible for over half the jobs, they only receive 18.7 percent of the total bank credit, according to ADB [the Asian Development Bank].”

Sugirin said the total SME financing gap is approximately $1.5 trillion, with most existing supply chain finance entities focused on solutions that hinge on the receipt of goods or at least a post-shipment notification. “You have to move the goods and you have to move the cash,” said Gary Schneider, vice president of financial services at the software provider Infor Nexus, which offers trade finance solutions and recently tied up a deal with Standard Chartered. “But the data on which both are reliant, it’s the same. What did you order? What did you ship? What’s in the container? And for the buyer, what should I pay and when?”

Connectivity and data

The broadening of access to trade finance is based on some of the same concepts that have taken root in other areas of logistics: connectivity to a network of trading partners, real-time sharing of data, and a comfort level with cloud-hosted, browser-based systems. "Banks were providing liquidity where they were, but it was a paper-based and disconnected world," Schneider said. "Networks like Infor Nexus were building, and their clients were joining our network and it was an opportunity for financing. We were deep in retail and apparel and footwear; we had a dense network with lots of transactions and lots of suppliers. There was the realization that big suppliers are on our network, and we want to finance them."

Schneider said trade financing has typically fallen into two categories based on risk profiles. In one, a bank is more comfortable that a big buyer of goods — i.e., an importer — is a safer bet to back than the thousands of sellers — i.e., overseas suppliers — it buys from.

The other category is financing the suppliers, smaller entities that typically need cash in their pre-production phase. That need, he said, has traditionally been served through letters of credit issued by local banks that have a higher comfort level with the risk of backing a small company in their region. The new mentality around trade finance, however, is to use the volume of transaction data captured in logistics networks such as Infor Nexus' and use that to moderate risk for financiers.

"In the last five years, that buyer and supplier have transacted a lot," Schneider said. "Here's what's been ordered, here's how likely the production stays on schedule, how much has been deducted. There's this rich trove of information." That information helps a bank or other financing entity mitigate risk and provide visibility in the financing decision, Schneider said. "You weren't able to get the insights as a bank to what's happening in that relationship," he said. "So they're incorporating information into their risk models, and it's more than just balance sheet information, which is especially important in that pre-shipment decision."

A multitude of entities have inserted themselves into the trade finance picture in recent years, and that list continues to grow. It includes legacy financial institutions such as Bolero, Mastercard, and NASDAQ; startups such as Mundi, which focuses on US–Latin America trade finance; and logistics providers such as Beacon, a London-based digitally oriented forwarder that focuses on integrating trade finance and freight processes. In the middle are long-established container carriers, notably Maersk Line and CMA CGM, forwarders such as Flexport, and software providers such as Arviem and Infor Nexus.

Suppliers driving demand for new options

Sugirin said that multinational corporations are focused on the sustainability of their supply chains and simultaneously looking to shorten and simplify them, "moving from just-in-time to just-in-case strategies." "Trade finance solutions will help dampen the impact," he said. "We are seeing a significant increase in interest in our supply chain finance solutions in geographies where the suppliers are based. Moreover, with the heightened focus on digitization, collaboration between banks and platforms will accelerate innovation to deliver financing to the last mile."

Standard Chartered incorporated Infor Nexus' trade finance platform to augment its own trade finance solutions, which range from cash management and liquidity to trade finance, to reach customers that had previously built their supplier networks via Infor Nexus. "Clients with complex supply chains and multi-bank relationships tend to work with third-party platforms," he said. "Some clients had already invested heavily in digitizing their supply chains with platforms such as Infor Nexus. With the development of an API [application programing interface], these linkages and collaboration will ease the implementation and make the experience even more immersive."

He said the API also gives Standard Chartered reach into a market of smaller suppliers that might have been seen as too risky to back in the past. "We get far deeper insights into the physical supply chain and this data provides more visibility on the performance of each supplier," he said. "Today we are looking at the data to see historical track records, and over time we will be able to use this data to predict financing needs and opportunities in real time.”

Historical decisions ‘intrinsically out of date’

Another major player in the trade finance space is Greensill, a London-based firm that focuses on providing working capital to large and small businesses globally. The company uses “technology, legal structure, and a significant and diverse source of capital” to serve millions of small customers in 170 countries, CEO Lex Greensill said in an interview in late July with Radu Palamariu, who runs a Singapore-based executive search consultancy.

“Delivering credit real time to millions of organizations, such as we do, is about getting information faster,” he said. “It’s about having better and more complete information than historically has been available and having information that’s real-time and forward-looking, as opposed to credit that’s driven on a backward-looking basis, where the information you’re using is intrinsically out of date.” Greensill said that even a decade into its business, the supplier trade finance market has room to grow because “finance to SMEs is, for all intents and purposes, nonexistent, or at least nonexistent at price points that are fair.”

That technology might help smooth the rough edges of global buyer-seller relationships is no shock to companies that have seen opportunities there for the taking as both the financial and logistics world gravitated toward digital environments. The difficulty in developing such solutions, according to James Coombes, founder of the data ingestion software provider Vector.ai, lies not just in the opacity of shipment information for financing institutions but also in an administrative inertia in the banking industry. “The bank helps the tension between an importer and exporter when they don’t know each other well,” he said. “The importer doesn’t want to pay until they get the goods, and the exporter wants to be sure the importer will pay.”

The mechanism used to reduce that tension, the letter of credit, is linked to shipping documents, such as the bill of lading (BL) and the packing list, “anything it takes to allow a good to cross an international border,” Coombes said. “The bank has the title because they have the BL, but banks have a huge operational aspect,” he said. “The documents have to fit all these rules, and it’s incumbent on the bank to get it right. In sum, the docs rule this financing aspect. It’s almost over-collateralized. Rates are low but banks charge a lot because of this administrative friction. The pain point is not the credit, it’s the operational part.” That friction has driven players such as Maersk, CMA CGM, and the Swiss visibility provider Arviem, all of whom serve shippers as customers, to tether their own data from those customers to the ability to offer trade finance options.

The container lines use transactional data to create a risk profile about who and what to finance, similar to Infor Nexus’ approach but without the in-house network of connected suppliers. Schneider said Infor Nexus is open to being the “engine” for container lines or other service providers to add a trade finance solution and that supplier connectivity. “Our engine is for rent,” he said. “We have no problem with a carrier sticking their logo on that engine. The larger networks will be more agnostic to service providers.” Sugirin noted that Standard Chartered recently joined TradeLens, the Maersk- and IBM-developed container visibility and data platform, a signal that there will be more interconnectedness between banks, software vendors, and container lines.

Arviem uses sensor-based visibility data on containerized goods to reduce the risk profile of cargo in transit, thus allowing partner banks to feel more secure in knowing when goods are likely to arrive. That, in turn, allows buyers to preserve working capital by getting credit from financiers that are comfortable the goods are indeed where they are purported to be. Another approach is incorporating a trade finance option at the time of booking freight instantly, such as Alibaba began offering to sellers on its business-to-business marketplace to US buyers in April. That model is similar to what Beacon, a new entrant into the digital forwarding category, has based its business around.

There's a further theory in the trade finance world that the industry will be mostly populated by non-traditional bank entities as those entities figure how to use data to tap into pools of capital on one side and the networks of suppliers on the other. One software vendor suggested to JOC.com that, over time, these smaller, transactional financing events "don't produce enough juice for the squeeze" for traditional banks.

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

Trans-Pacific GRIs pushing spot rates above $3,500 per FEU

Spot container freight rates are surging to new 2020 highs as carriers in the eastbound trans-Pacific begin to implement an Aug. 15 general rate increase (GRI), the fourth GRI since June 1. Spot rates from Asia to the West Coast are the highest they've been since at least 2010, while spot rates to the East Coast are the highest they've been since November 2018

Shipments booked for Aug. 15 departures from Asian ports are paying about $3,600 per FEU to the West Coast and $4,100 per FEU to the East Coast, carrier and non-vessel operating common carrier (NVO) sources told *JOC.com* Monday. Those rates are up from Friday's rates of $3,144 per FEU to the West Coast and $3,504 per FEU to the East Coast listed in the Aug. 7 Shanghai Containerized Freight Index (SCFI) published in the JOC Shipping & Logistics Pricing Hub. Compared with a year ago, eastbound spot rates to the west and east coasts are up 98 percent and 25 percent, respectively.

Kurt McElroy, executive vice-president of Apex Maritime, said a few carriers were first to quote the higher spot rates, and he expects others to do the same later this week. "We're definitely seeing those rates — $3,600 and $4,100," he said. Spot rates in the eastbound trans-Pacific have climbed steadily since the end of May, when they were $1,678 per FEU to the West Coast and $2,543 per FEU to the East Coast, according to the SCFI.

Carriers in the eastbound trans-Pacific implemented GRIs on June 1, June 15, and July 1. US imports began to surge in late June as some regions of the country reopened following the coronavirus disease 2019 (COVID-19) shutdowns. Carriers also blanked 63 sailings from Asia to North America from June 1 through July 30, according to Sea-Intelligence Maritime Consulting, in a bid to manage capacity.

Stay-at-home orders, PPE driving imports higher

A variety of imports, especially personal protective equipment (PPE), and products and furniture for at-home offices and back-to-school remote learning, are driving much of the spike in freight pricing. Equipment shortages in Asian ports, as well as in US gateways, are also driving spot rates higher. "We're right in the midst of a strong peak, a really strong peak," said David Bennett, president of the Americas at the NVO Globe Express Services. "I definitely can confirm that we are seeing a second wave of PPE. Roughly 5 to 10 percent of what we're seeing is related to PPE," said Nerijus Poskus, global head of ocean freight at the forwarder Flexport. Poskus said PPE shipments surged in April and May, backed off a bit in June, and then began another spike in July.

The ports of Los Angeles and Long Beach continue to handle the bulk of the import surge as time-to-market is crucial for just-in-time shipments destined for large consuming populations in the US interior. Transit times from Asia to West Coast ports are about 10 days to two weeks faster than to East Coast ports. Although spot rates to the East Coast are climbing, the differential with the West Coast, which is normally close to $1,000 per FEU, is now only about $500. That indicates import volumes are strongest to the West Coast. “It’s mostly to the West Coast. I don’t see the East Coast volumes exploding,” a carrier executive told *JOC.com*.

In fact, the second hot spot after Los Angeles-Long Beach is the Pacific Northwest, Poskus said. Demand for space on PNW services to the Northwest Seaport Alliance ports of Seattle and Tacoma is rapidly filling up those services, he said.

Equipment problems mount

Equipment shortages are contributing to capacity constraints, and this is pushing spot rates higher. Exporters in Shanghai, Taiwan, and Vietnam are having trouble securing 40-foot and 40-foot high-cube containers, Poskus said. In the US gateways, it is a chassis shortage or dislocation problem, mostly in Los Angeles and Long Beach, but more recently in Oakland as well, he said. Bennett said there are sporadic shortages of drayage drivers serving some Southern California transloading facilities, which are struggling to attract enough warehouse workers during COVID-19 to handle increased volumes. The problem is compounded for shipping the 53-foot transloaded containers to the US interior by a shortage of domestic containers, he said.

“There’s a lack of domestic capacity, and it’s creating a severe backlog,” Bennett said. Chassis shortages and domestic equipment shortages are having a “backup effect” that is reverberating throughout the supply chain in Southern California, he said. McElroy said the import surge is showing no immediate signs of tapering off. “The strength of this market will continue into September,” he said.

Carriers have announced only three more blank sailings to the West Coast and three to the East Coast in August and September, which should relieve some of the vessel capacity issues in Asia, Sea-Intelligence 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 7 August 2020	Current Index 14 August 2020
Comprehensive Index			1107.39	1167.91
Service Routes				
Europe (Base port)	USD/TEU	20%	910	916
Mediterranean (Base port)	USD/TEU	10%	940	967
USWC (Base port)	USD/FEU	20%	3144	3406
USEC (Base port)	USD/FEU	7.50%	3504	3913
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	783	780
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	1094	1098
East/West Africa (Lagos)	USD/TEU	2.50%	2612	2693
South Africa (Durban)	USD/TEU	2.50%	761	799
South America (Santos)	USD/TEU	5.00%	963	1309
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	134
Korea (Pusan)	USD/TEU	2.50%	117	118

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