การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 41 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 31-Oct-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	800-900	1,600-1,750	FAF: USD 6/TEU, USD 12/FEU	
Thailand - Sydney	900-1,000	1,800-1,950		
Thailand – Durban / Cape Town	1,300	2,600	Subject to ISOCC USD 51/TEU, USD 102/FEU	
	Subject to SCMC USD 30/BL			
Thailand – Europe (Main Port)	800	1,500	ISOCC: USD 53/TEU, USD106/FEU	
	Subject to ENS USD30/BL			
Thailand - US West Coast	3,000	3,800	-	Effective till 14-Oct-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

สถานการณ์ค่าระวางในช่วงเดือนตุลาคม 2563 อัตราค่าระวางในเส้นทางเอเชียส่วนใหญ่คงที่ 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 และเส้นทาง Japan ค่าระวางอยู่ที่ 300 USD/TEU และ 400 USD/FEU

ส่วนเส้นทางที่ค่าระวางปรับเพิ่มขึ้น ได้แก่ เส้นทางแอฟริกาใต้ ค่าระวางปรับเพิ่มขึ้น 500 USD/TEU และ 1,300 USD/FEU ทำให้ค่าระวางอยู่ที่ 1,300 USD/TEU 2,600 USD/FEU ซึ่งสถานการณ์ขณะนี้พบว่า Space เรือค่อนข้างแน่น ราคาจึงปรับเพิ่มสูงขึ้น และเส้นทาง Australia ค่าระวางปรับเพิ่มขึ้น 125 USD/TEU โดยเรียกเก็บอยู่ระหว่าง 800-900 USD/TEU และ 1,600-1,750 USD/FEU และเรียกเก็บค่า FAF ในอัตรา 6 USD/TEU โดยเส้นทาง Sydney พบปัญหาความหนาแน่นภายในท่าเรือ ทำให้มีการปรับอัตราค่าระวางสูงขึ้นมากกว่าท่าเรืออื่นในออสเตรเลีย โดยค่าระวางอยู่ที่ 900-1,000

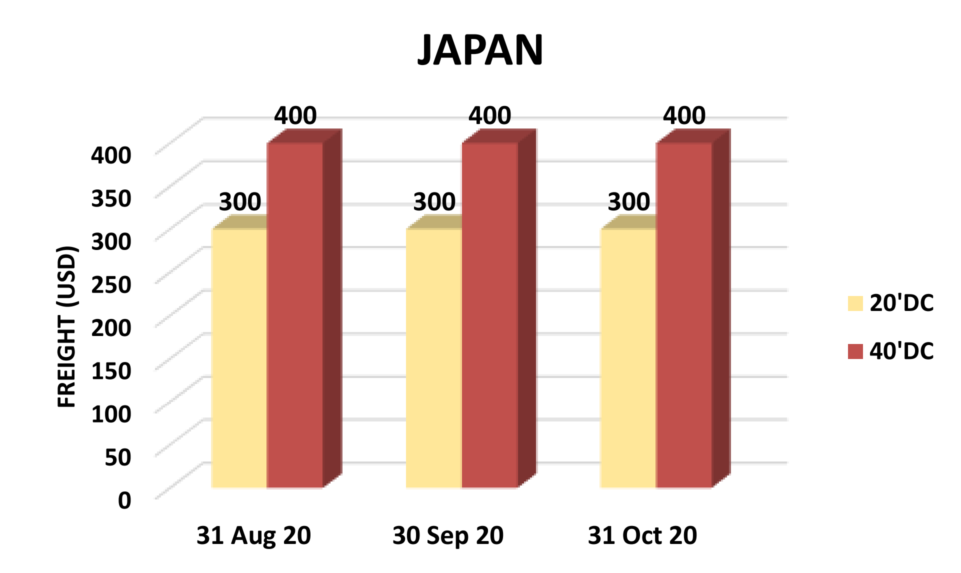
USD/TEU และ 1,800-1,950 USD/FEU และเรียกเก็บค่า FAF ในอัตรา 6 USD/TEU นอกจากนี้ พบว่าบางสายเรือมีการงดรับ Booking ไปยังท่าเรือ Sydney ชั่วคราว ดังนั้น ผู้ส่งออกจึงจำเป็นต้องตรวจสอบกับสายเรือที่ใช้บริการอีกครั้งหนึ่ง

สำหรับเส้นทางที่ค่าระวางปรับลดลง ได้แก่ เส้นทาง Europe ค่าระวางปรับลดลง 50 USD/TEU ทำให้ค่าระวางอยู่ที่ 800 USD/TEU และ 1,500 USD/FEU รวมถึงยกเลิกการเรียกเก็บ Peak Season Surcharge (PSS) และเส้นทางสหรัฐอเมริกาช่วงครึ่งเดือนแรกของเดือนตุลาคม ค่าระวางฝั่ง West Coast ปรับลดลง 400 USD/TEU และ 500 USD/FEU ทำให้ค่าระวางอยู่ที่ 3,000 USD/TEU และ 3,800 USD/FEU ในขณะที่ฝั่ง East Coast ค่าระวางปรับลดลง 500 USD/TEU และ 600 USD/FEU ทำให้ค่าระวางอยู่ที่ 3,600 USD/TEU และ 4,500 USD/FEU ซึ่งขณะนี้ยังคงพบปัญหา Space ที่ยังคงค่อนข้างแน่นอย่างต่อเนื่อง โดยเฉพาะอย่างยิ่งทางฝั่ง East Coast ที่ได้ Space Allocation น้อยกว่า โดยอาจทำให้เรือมีความล่าช้าประมาณ 1-2 สัปดาห์ ดังนั้น ผู้ส่งออกจำเป็นต้องวางแผนการจองระวางล่วงหน้ากับสายเรือที่ใช้บริการ

CONTAINER FREIGHT RATE (REEFER)

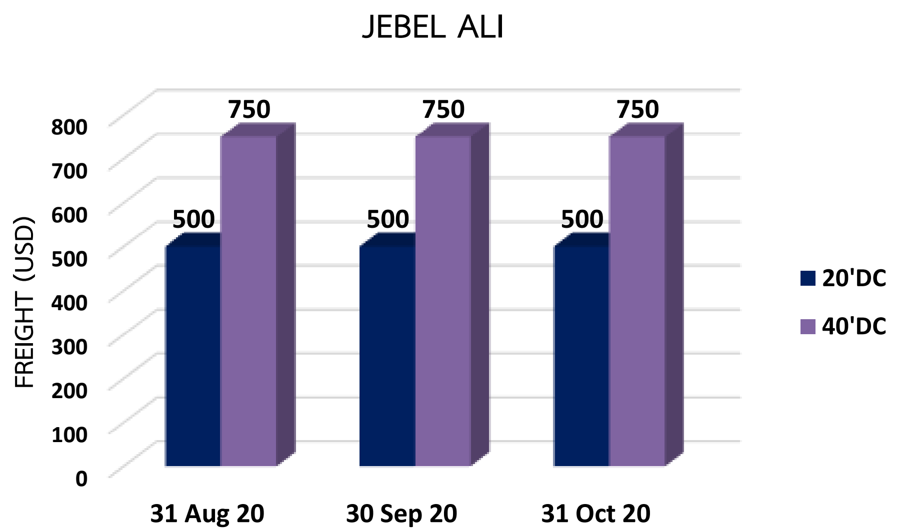
<table>
<tr><th rowspan="2">ROUTE</th><th colspan="2">SIZE</th><th rowspan="2">Bunker Surcharge / Low Sulphur Surcharge</th><th rowspan="2">Remark</th></tr>
<tr><th>USD/20’</th><th>USD/40’</th></tr>
<tr><td>Thailand-Hong Kong</td><td rowspan="2">700</td><td rowspan="2">800</td><td rowspan="2">USD 30/TEU, USD 55/FEU</td><td rowspan="4">Effective till 31-Oct-2020</td></tr>
<tr><td>Thailand-Shanghai</td></tr>
<tr><td>Thailand-Japan (Tokyo, Yokohama)</td><td>900</td><td>1,200</td><td>-</td></tr>
<tr><td>Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)</td><td>1,500-1,550</td><td>1,900-2,000</td><td>USD 45/TEU, USD 90/FEU</td></tr>
</table>

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



Subject to Low Sulphur Surcharge (Aug.): USD 9/TEU และ USD 17/FEU
(Sep.& Oct.): USD 17/TEU และ USD 34/FEU

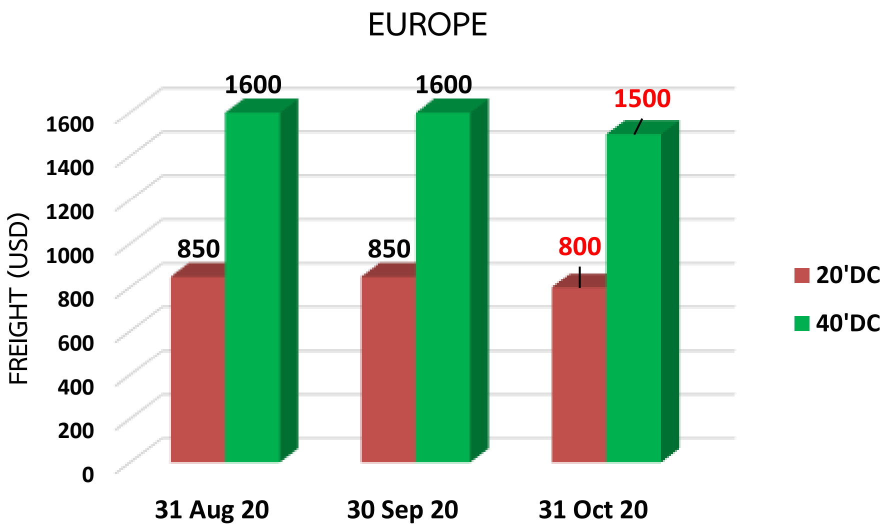
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-Jebel Ali เดือน ส.ค. ถึง ต.ค. ปี 2563



Subject to

- War Risk Surcharge: USD35/TEU และ USD70/FEU
- Low Sulphur Surcharge (Aug.): USD23/TEU และ USD46/FEU
  (Sep.& Oct.): USD34/TEU และ USD68/FEU

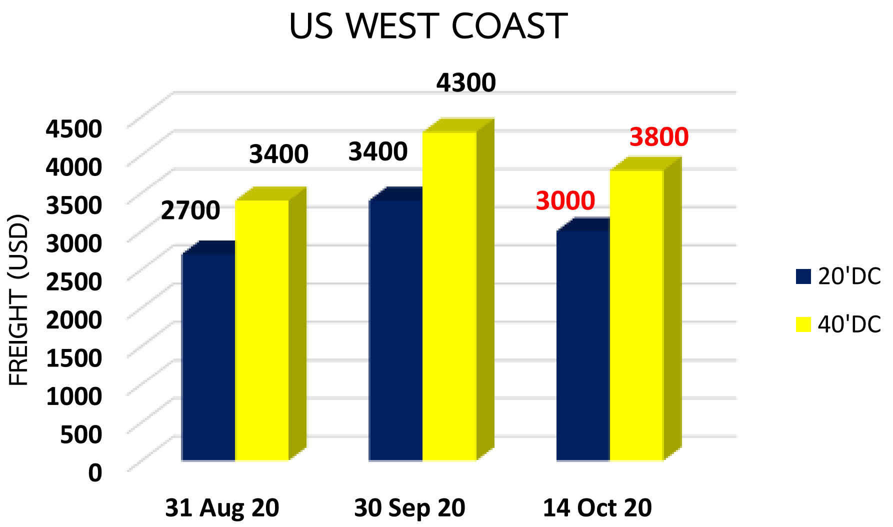
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน ส.ค. ถึง ต.ค. ปี 2563



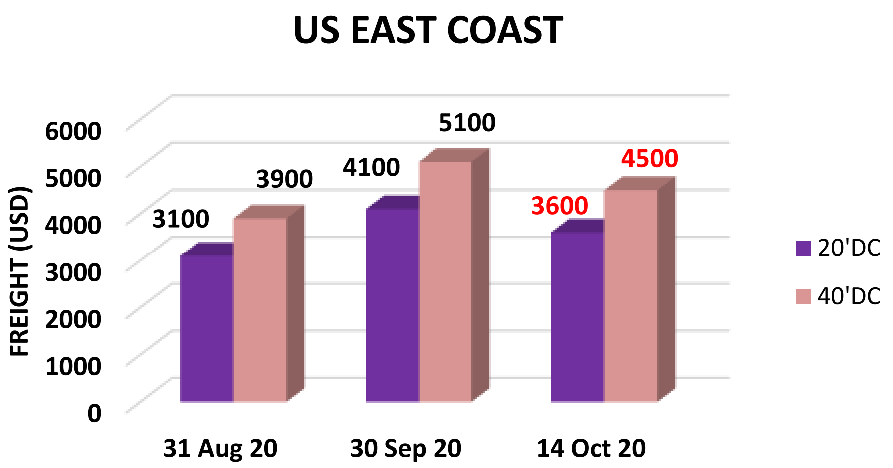
Subject to

- ENS: USD30/BL
- ISOCC (Aug.-Oct.): USD53/TEU และ USD106/FEU

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



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



Subject to Panama Low Water Surcharge: USD 30/Container

➢ **รวบรวมประกาศสำคัญจากสายเรือ**

<u>สายเรือ Hapag Lloyd</u>

- ประกาศปรับลดการเรียกเก็บค่า General Rate Increase (GRI) สำหรับสินค้าจากเส้นทาง East Asia ไปยัง East Coast South America มีผลตั้งแต่วันที่ 15 ตุลาคม 2563 โดยมีรายละเอียดดังตาราง

Routing	General Rate Increase (GRI)	
	Effective 1-Oct-2020	Effective 15-Oct-2020
To East Coast South America	USD 700/Container	USD 300/Container

Ex-Asia long-term ocean freight rates rise by 30%

After holding steady in September, data from Xeneta indicates significant increases in contract pricing on both the Asia-Europe and the eastbound transpacific from the fourth quarter, as long-term rates start to 'cover some of the price gap between the spot and contract market'. After holding steady in September, emerging data from digital container shipping rates specialist Xeneta indicates that the market is starting to see significant increases in long-term contract pricing for ocean freight shipments out of Asia from the fourth quarter (Q4) of 2020 onwards, including long-term rates rising 30% or more on both the Asia-Europe and the eastbound transpacific.

And although short-term market rates may now be showing the early indications of reaching a plateau, following strong increases in recent months of spot-market pricing, long-term rates have remained steady but were now showing signs of increasing and covering some of the gap between pricing on the spot and contract market, Xeneta highlighted.

Xeneta noted that long-term ocean freight rates have "remain unbowed by the impact of the global coronavirus pandemic", with the latest XSI Public Indices report from Xeneta showing a decline of just 0.1% across September, "while spot rates, meanwhile, remain at an all-time high". It said that with carriers now moving to reinstate tonnage on key routes, "question marks remain over the mid to long-term resilience of rates against a backdrop of on-going economic uncertainty".

The rates data specialist said that the coronavirus "may have derailed economic activity across the board, but, thanks to proactive strategies from the world's container carriers – including cancelling sailings and adjusting routes – long-term rates have defied expectations". According to XSI, which is based on crowd-sourced data from leading shippers – utilising over 200 million data points, covering more than 160,000 port-to-port pairings – year-on-year rates have fallen by just 2.2%, down 2% since the start of 2020. September's development follows on from a decline of 1.8% in August. But Xeneta warned that its XSI "already sees substantial increases for contracted rates for Q4 2020 – and even more so expected for Q1 2021".

Resilient market

Xeneta CEO Patrik Berglund commented: "Suffice to say, there's many in the industry that continue to be taken by surprise by the apparent resilience of the segment's all-important long-term rates. This has been good news for carriers and less positive for shippers looking to negotiate new contracts.

"On top of that we see spot rates 'hitting it out of the park', with Far East-US trades commanding higher price tags than ever before," noting that there was "a shade of the surreal to developments when we look at the wider economic and geopolitical context".

Berglund said carriers "are in a good position to post solid profits if they manage to keep it a 'seller's market' over a prolonged period", noting: "Both US and EU shippers are set to begin RFQs on the contract market for significant volumes in the coming weeks. If carriers can sustain the current rates, then the upcoming tender season (from Q4 2020 to Q1 2021) can initially be locked in at very high rate levels." He added: "Postponing tenders would be a very attractive alternative for shippers, but it will be hard to get carriers to agree to this. Buying on the spot market is a temporary possibility, which is full of risk and costly, but can be an attractive short-term alternative for shippers looking to get through the worst before returning to a more favourable contract market."

Regional breakdown

Berglund noted: "The transpacific Eastbound is on a historic high and it's the worst time-to-market for shippers looking to secure new long-term rate agreements in Q4 and Q1. If rates stay high, the impact will trickle into the main tender cycle for this period come Q1 to Q2. "We already see long term rates with +30% increases coming into the Xeneta platform – and expect more to come on this corridor the longer the spot market remains high. Shippers report constant fire-fighting mode as equipment is scarce and carriers push contract players onto the spot market, as it offers a much better yield.

"Asia-Europe front- and backhaul is also very strong with the fronthaul already clocking in contract rates at a 30% rate increase. We expect to see further increases as more and more European shippers settle their long-term rates this upcoming quarter." He continued: "On the transatlantic westbound and the North Europe-South America East Coast, we see different trends. Both corridors have been on a slow downward trend for both the spot and contract market since the beginning of the year. However, both these corridors currently remain at a healthy rate level for the carriers, and at the same time, acceptable rates for shippers."

Plateau on short-term market

Berglund noted: "We now see early indications of reaching a plateau for the short-term market across key benchmarks, with long-term rates increasing and covering some of the gap between the spot and contract market. Shippers need to be on the lookout for short-term rate reductions in order to understand where the long-term market is heading. "The market, and indeed the wider world, remains in a state of flux, so there's zero certainty on the horizon. What we do know is that tonnage has to return and that will impact upon the supply-demand dynamic. Individual carriers are also adjusting their own organisations – with, for example, Maersk streamlining (phasing out its Damco and Safmarine brands), while Pacific International Lines (PIL) is slipping out of the first division (namely the top 10 carriers) after recent asset disposals." He concluded: "It'll be interesting to see how this complex range of internal and external factors impacts upon the industry and rates going forwards. XSI will help everyone navigate, understand and adjust to the latest developments."

Drilling down into September's XSI rates figures, Xeneta said European imports fell by 0.3% (down 1.7% year-on-year) with exports declining by 0.4% (up 0.4% on September 2019). It was a development mirrored on the Far East market where imports slipped 0.3% and the export benchmark lost 0.2% of its value. Regional imports are now down 1.9% year-on-year, while exports are 2.6% lower, but 0.3% up since the start of the year. The US import index provided a bright spot for carriers, up 0.5% (but down 1.8% against September 2019), while exports declined by 2.6% for the month, some 6.4% lower than the same point last year. Companies participating in Oslo-based Xeneta's crowd-sourced ocean and air freight rate benchmarking and market analytics platform include names such as ABB, Electrolux, Continental, Unilever, Lenovo, Nestle, L'Oréal, and Thyssenkrupp.

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

Retailers increase forecast amid US import deluge

US retailers are forecasting a much healthier outlook for imports this month, buoyed by expectations of a strong holiday shopping season driven by both in-store and online purchases. The October issue of Global Port Tracker, published Thursday, forecasts that US imports will decline just 1.1 percent this month from October 2019. Last month's report called for a 9.2 percent year-on-year drop for October.

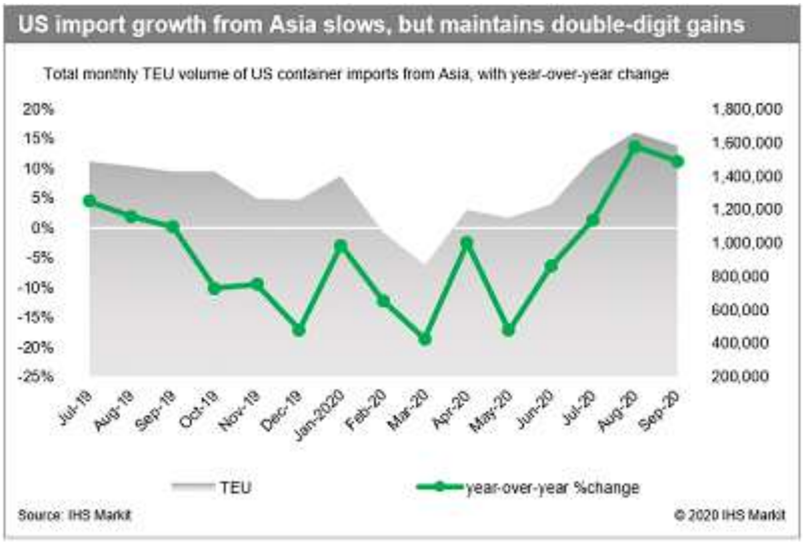
"The US economy is beating forecasts, with consumption up and imports setting new records," Ben Hackett, founder of Hackett Associates, said in a statement accompanying the Global Port Tracker. "Retail sales are a big part of consumer spending, so one would expect to see an increase when the economy improves and consumers are confident." Carriers closely watch inventory-to-sales ratios as an indicator of consumer demand, and therefore imports in the coming months, and the ratio has dropped steadily from 1.45 in March to 1.23 in July, according to the Federal Reserve Bank of St. Louis.

Retailers now forecast a year-on-year decline of 5.1 percent for November imports, up slightly from last month's prediction of a 6.8 percent decline. The forecast for December is essentially unchanged — a year-over-year decline of 11.2 percent versus the 11 percent drop expected in last month's Global Port Tracker, which is published by the National Retail Federation (NRF) and Hackett Associates. US imports in September increased 10.1 percent from September 2019, according to PIERS, a JOC.com sister company within IHS Markit. Imports from Asia, the largest source of consumer merchandise, increased 11.2 percent year over year.

<u>Retailers struggling with forecasts</u>

Since the US economy began to show signs of improvement in June following COVID-19 lockdowns, retailers' forecasts going several months forward have lagged actual import growth reported by PIERS. Retailers place purchase orders with factories in Asia at least three months before the merchandise arrives at US ports. For example, Global Port Tracker last month forecast imports would increase 1.1 percent year over year in September, but the PIERS numbers reported on Wednesday showed a much higher increase of 10.1 percent.

"Nothing about this year is predictable," said Jonathan Gold, NRF's vice president for supply chain and customs policy. However, some big-box and online retailers were caught with stock outages in late summer as consumers stepped up purchases faster than anticipated, prompting retailers to increase their purchase orders and forecasts.



"They are also stocking up earlier than usual because they know many consumers will be shopping early this year to avoid crowds and shipping delays," Gold said. "Some holiday merchandise that normally wouldn't arrive until Halloween is already here." Non-vessel-operating common carriers (NVOs) have told JOC.com purchase orders are already being placed with factories for spring 2021 merchandise, with the intent being to ensure the product is shipped before factories in Asia shut down for the Lunar New Year holidays that will begin on Feb. 12. NVOs and carriers say import volumes could remain elevated through January.

While all US ports are enjoying increased import volumes this fall, retailers are directing a significant share of their imports through the ports of Los Angeles and Long Beach. Imports from Asia through the Southern California gateway increased 22 percent year over year in both August and September, according to PIERS.

However, with September imports from Asia into Los Angeles-Long Beach jumping 101 percent from where they were in March when the COVID-19 economic downturn began, the ports have struggled to move the huge volumes through the terminals and on to import distribution centers in the region. The Southern California supply chain has been hampered by terminal congestion, increasing container dwell times on the docks, slower gate times, shortages of truck capacity and chassis, and reduced productivity and labor shortages at warehouses.

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

Spot rates hold steady as retailers anticipate consumers shopping early for Xmas

As China's Golden Week national holiday comes to an end, container shipping spot rates on the main east-west trades have remained flat. According to today's Shanghai Containerised Freight Index (SCFI), spot rates on the Shanghai-North Europe trade fell a marginal $19 to $1,149 per teu.

On the Shanghai-Mediterranean route, the decline was just $9, to end the week on $1,202 per teu. Year-on-year comparison demonstrates just how remarkably strong the carriers' position on the trade has become – at this point last year, the spot rate to Northern Europe was $581 per teu, with the SCFI reporting average vessel utilisation of 85% on ships departing Shanghai. According to the eeSea liner database, carriers have blanked 13 of the scheduled 97 Asia-North Europe sailings this month – representing a 14% reduction in terms of teu capacity.

However, there has not been a single blanking announcement for November's 77 scheduled sailings, according to eeSea. And while vessel capacity is expected to ease for shippers and forwarders anxious to get cargo into Europe before Christmas, the focus will likely turn to container availability, according to Martin Holst-Mikkelsen, head of ocean freight EMEA at Flexport. He told *The Loadstar* today: "The space situation has improved out of the Asian baseports, and we see space becoming available a week out from most ports, while rollings have become less of an issue recently. "Equipment remains a challenge for the majority of carriers, especially in the South China region, whereas we have seen this improving in Shanghai and Ningbo," he added.

A picture of continuing strong demand and stable spot rates was also seen on the transpacific: Shanghai-US west coast rates fell just $15, to $3,848 per 40ft, while the Shanghai-US east coast SCFI rate was unchanged at $4,622 per 40ft. Although actual throughput numbers have yet to be published, forecasts from the US National Retail Federation said September imports were expected to reach 2.08m teu, a 10.9% year-on-year climb, and the second-highest month ever.

NRF vice president for supply chain and customs policy Jonathan Gold suggested the demand had be driven by changing consumer behaviour in the wake of the pandemic and retailers responding with higher inventory levels. “After staying at home this spring, consumers are buying again and retail supply chains are working overtime to keep up with demand,” he said. “Nothing about this year is predictable, but retailers are making sure their shelves and warehouses are well-stocked for the holidays. But they are also stocking up earlier than usual, because they know many consumers will be shopping early to avoid crowds and shipping delays. “Some holiday merchandise that normally wouldn’t arrive until Halloween is already here,” he added.

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 30 September 2020	Current Index 9 October 2020
Comprehensive Index			1443.54	1438.22
Service Routes				
Europe (Base port)	USD/TEU	20%	1168	1149
Mediterranean (Base port)	USD/TEU	10%	1211	1202
USWC (Base port)	USD/FEU	20%	3863	3848
USEC (Base port)	USD/FEU	7.50%	4622	4622
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	1073	1065
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	1633	1648
East/West Africa (Lagos)	USD/TEU	2.50%	3293	3265
South Africa (Durban)	USD/TEU	2.50%	1737	1736
South America (Santos)	USD/TEU	5.00%	3958	3952
West Japan (Base port)	USD/TEU	5.00%	232	232
East Japan (Base port)	USD/TEU	5.00%	238	238
Southeast Asia (Singapore)	USD/TEU	7.50%	131	135
Korea (Pusan)	USD/TEU	2.50%	118	118

....