

# การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 4 พ.ศ. 2564



สรุปค่าระวางเรือประจำสัปดาห์

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	SIZE		Low Sulphur Surcharge (LSS)	Remark
	USD/20'	USD/40'		
Thailand - Shanghai	350	800	Subject to ISOCC USD 17/TEU, USD 34/FEU	Effective till 28-Feb-2021
Thailand - Qingdao	450	950		
Thailand - Hong Kong	250	700		
Thailand - Japan (Main Port)	450	900		
Thailand - Kaohsiung	250	680		
Thailand - Klang	450	1000	Subject to ISOCC USD 11/TEU, USD 23/FEU	
Thailand - Jakarta	550	1100		
Thailand - Ho Chi Minh (Cat Lai)	220	600		
Thailand - Singapore	230	650		
Thailand - Manila (North & South)	450	950		
	Subject to CIC at destination			
Thailand - Jebel Ali	950	1,600	Subject to ISOCC USD 45/TEU, USD 90/FEU	
	Subject to War Risk Surcharge: USD 35/TEU, USD 70/FEU			
Thailand - South Korea (Busan)	250	500	-	
Thailand - South Korea (Incheon)	300	600		
Thailand - Melbourne	1,350-1,450	2,700-2,850	FAF: USD 32/TEU, USD 64/FEU	
Thailand - Sydney	1,650-1,750	3,300-3,450		
Thailand – Durban / Cape Town	2,700	5,200	Subject to ISOCC USD 68/TEU, USD 136/FEU	
	Subject to SCMC USD 30/BL			
Thailand – Europe (Main Port)	4,000	8,000	PSS: USD 500/TEU, USD 1,000/FEU ISOCC: USD 53/TEU, USD 106/FEU LSS: USD 20/TEU, USD 40/FEU	Effective till 14-Feb-2021
	Subject to ENS USD40/BL			
Thailand - US West Coast	3,200	4,000		
Thailand - US East Coast	3,800	4,700		
	Subject to Panama Low Water USD 30-60/Container			

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

สถานการณ์ค่าระวางในช่วงเดือนกุมภาพันธ์ 2564 ค่าระวางในเส้นทางเอเชียส่วนใหญ่เริ่มมีอัตราคงที่ โดยเส้นทาง Shanghai อัตราค่าระวางอยู่ที่ 350 USD/TEU และ 800 USD/FEU เส้นทาง Hong Kong ค่าระวางอยู่ที่ 250 USD/TEU และ 700 USD/FEU เส้นทาง Klang ค่าระวางอยู่ที่ 450 USD/TEU และ 1,000 USD/FEU และเส้นทาง Japan ค่าระวางอยู่ที่ 450 USD/TEU และ 900 USD/FEU โดยภาพรวมสถานการณ์ตู้สินค้าขาดแคลนเริ่มมีทิศทางดีขึ้นเล็กน้อย เมื่อเทียบกับช่วงปลายปี 2563 ที่ผ่านมา สำหรับเส้นทางแอฟริกาใต้ ค่าระวางปรับเพิ่มขึ้น 100 USD/TEU และ 200 USD/FEU ทำให้ค่าระวางอยู่ที่ 2,700 USD/TEU 5,200 USD/FEU โดยปรับเพิ่มการเรียกเก็บค่า ISOCC ในอัตรา 68 USD/TEU และ 136 USD/FEU

ส่วนเส้นทาง Melbourne ค่าระวางยังคงที่ โดยเรียกเก็บอยู่ระหว่าง 1,350-1,450 USD/TEU และ 2,700-2,850 USD/FEU ส่วนท่าเรือ Sydney ค่าระวางคงที่เช่นเดียวกัน โดยเรียกเก็บอยู่ระหว่าง 1,650-1,750 USD/TEU และ 3,300-3,450 USD/FEU โดยปรับเพิ่มการเรียกเก็บค่า FAF ในอัตรา 32 USD/TEU และ 64 USD/FEU

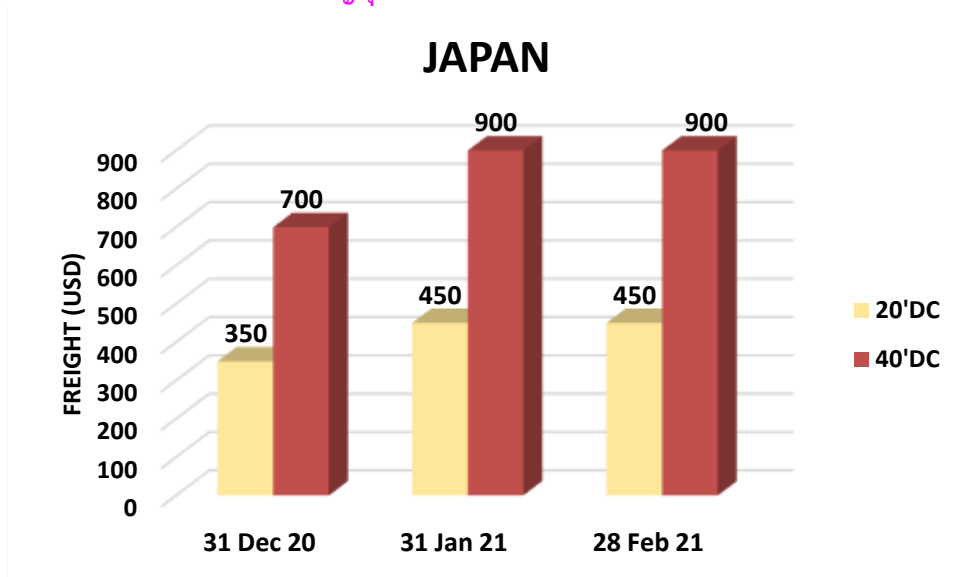
ในขณะที่เส้นทาง Europe ค่าระวางช่วงครึ่งเดือนแรกของเดือนกุมภาพันธ์ ค่าระวางปรับเพิ่มขึ้น 350 USD/TEU ทำให้ค่าระวางอยู่ที่ 4,000 USD/TEU และ 8,000 USD/FEU โดยมีการเรียกเก็บค่า Peak Season Surcharge ในอัตรา 500 USD/TEU และ 1,000 USD/FEU และเรียกเก็บค่า LSS 20 USD/TEU โดยปัจจุบันยังพบปัญหาการขาดแคลนตู้ 40'

ในขณะที่เส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนแรกของเดือนกุมภาพันธ์ ค่าระวางปรับเพิ่มขึ้น 100 USD/ตู้ โดยค่าระวางฝั่ง West Coast อยู่ที่ 3,200 USD/TEU และ 4,000 USD/FEU และฝั่ง East Coast ค่าระวางอยู่ที่ 3,800 USD/TEU และ 4,700 USD/FEU ซึ่งขณะนี้ยังคงพบปัญหาตู้ขาดแคลน และพบปัญหาเรือเกิดความล่าช้า ทำให้อาจมีการเปลี่ยนแปลงตารางเรือ

### CONTAINER FREIGHT RATE (REEFER)

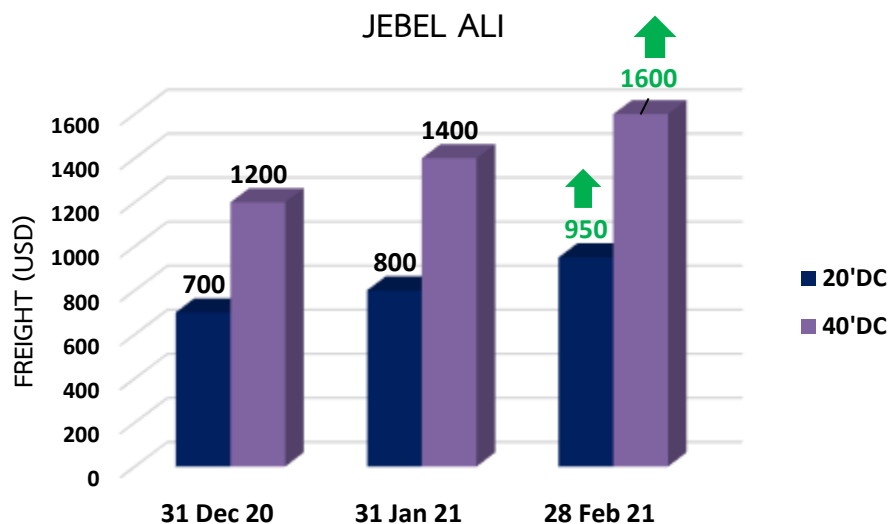
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	1,100	1,200	USD 30/TEU, USD 55/FEU	Effective till 28-Feb-2021
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	1,200-1,300	1,400-1,600	-	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	5,500	7,500-8,000	OBS: USD 76/TEU, USD 152/FEU + PSS: USD 500/TEU, USD 1,000/FEU	

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง ไทย-ญี่ปุ่น เดือน ธ.ค. ปี 2563 ถึง ก.พ. ปี 2564



Subject to Low Sulphur Surcharge (Dec.20-Feb.21): USD 17/TEU และ USD 34/FEU

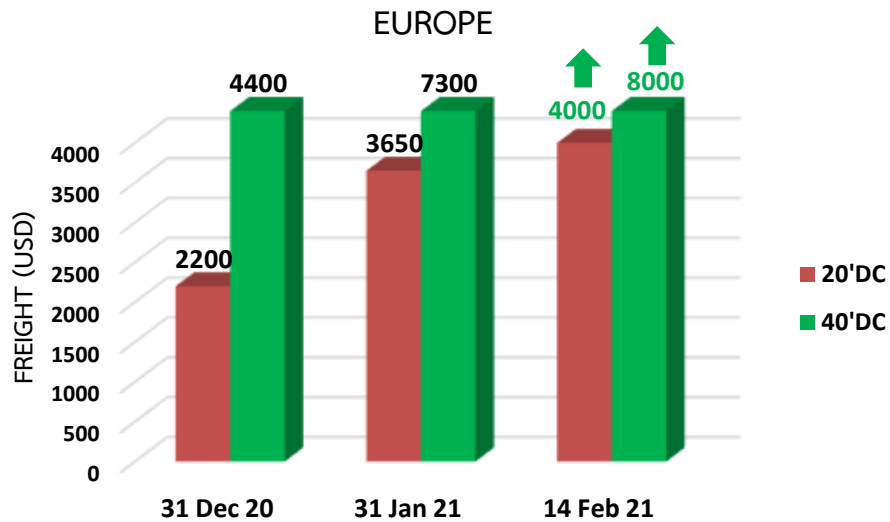
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง ไทย-Jebel Ali เดือน ธ.ค. ปี 2563 ถึง ก.พ. ปี 2564



Subject to

- War Risk Surcharge: USD35/TEU และ USD70/FEU
- Low Sulphur Surcharge (Dec.20-Jan.21): USD34/TEU และ USD68/FEU  
(Feb.21): USD45/TEU และ USD90/FEU

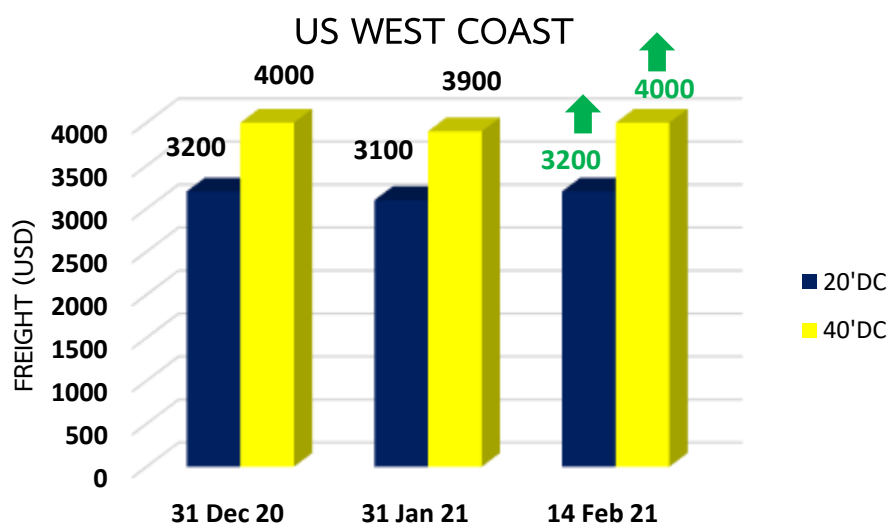
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง ไทย-ยุโรป เดือน ธ.ค. ปี 2563 ถึง ก.พ. ปี 2564



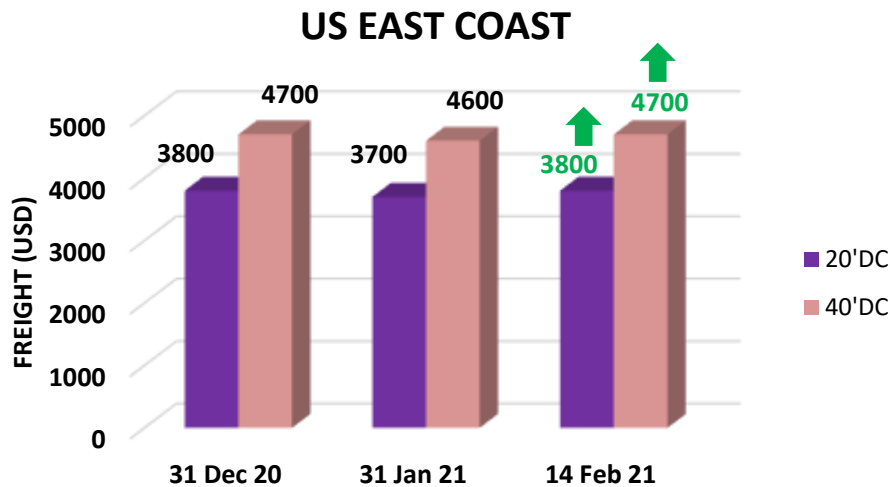
Subject to

- ISOCC (Dec.20) ISOCC included  
(Jan.21): USD35/TEU, USD70/FEU  
(Feb.21): USD53/TEU, USD106/FEU
- ENS: USD30/BL
- PSS: USD 500/TEU และ USD 1,000/FEU
- LSS (Feb.): USD 20/TEU และ USD 40/FEU

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง ไทย-สหรัฐอเมริกา West Coast เดือน ธ.ค. ปี 2563 ถึง ก.พ. ปี 2564



กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง ไทย-สหรัฐอเมริกา East Coast เดือน ธ.ค. ปี 2563 ถึง ก.พ. ปี 2564



Subject to Panama Low Water Surcharge: USD 30-60/Container

➤ รวบรวมประกาศสำคัญจากสายเรือ

สายเรือ Hapag Lloyd

- ประกาศแจ้งขยายการเรียกเก็บค่า General Rate Increase (GRI) สำหรับสินค้าจากเส้นทาง East Asia ไปยังสหรัฐอเมริกา และแคนาดา โดยมีรายละเอียดดังตาราง

Routing	General Rate Increase (GRI)
To USA & Canada	Effective Dec-2020 - Mar-2021
	USD 960/TEU, USD 1,200/FEU

- ประกาศเรื่องข้อกำหนดการนำเข้าสินค้าประเภทยานพาหนะที่มีมอเตอร์ ไปยังประเทศฮ่องกง ตามข้อกำหนดของกฎหมายของฮ่องกง และนโยบายของการดำเนินการในเทอร์มินอล ตามข้อบังคับมาตรา 17 และ 18 ของสมาคมการขนส่งสินค้าทางเรือของฮ่องกง (HKSA) โดยระบุว่าหากมีการบรรทุกชิ้นส่วนยานพาหนะที่มีมอเตอร์ และมีน้ำมันอยู่ในแทงก์ ในการบรรทุกด้วยตู้คอนเทนเนอร์ ต้องเป็นแบบเปิดเพดานด้านบน เพื่อให้มีอากาศถ่ายเทได้อย่างเหมาะสม โดยมีผลบังคับใช้ตั้งแต่วันที่ 1 มีนาคม 2564 ซึ่งหากไม่ปฏิบัติตาม ทางเทอร์มินอลจะไม่ดำเนินการ และปล่อยตู้ให้

**Asia-Europe ocean freight contract rates in record rise**

Long-term contract prices increased by 19.3% in January compared with December 2020, according to new figures from Xeneta. Long-term Asia-Europe ocean freight contract rates have seen a record rise this month, according to new figures from Xeneta. Import prices to Europe on the digital rates specialist's European XSI index increased by 19.3% in January compared with December 2020 to 132.67 points, with Xeneta noting that "this represents the largest monthly increase since the inception of the index, reflecting the unprecedented situation facing key trade lanes. As a result of this month-on-month rise, the benchmark is up 12.5% compared to the same period of 2020."

Despite the record rise, Xeneta told Lloyd's Loading List that it was surprised that the prices were not higher, given that Asia-Europe spot rates have risen more than fourfold in recent months. Xeneta explained that under the "long-term" contract rates umbrella, it looks at any contract that is valid for longer than 88 days, although it said that "in most cases, as we have mainly big volume shippers, these are 12-month

contracts”. Looking at the global Xeneta Shipping Index (XSI) for the contract container market, Xenta noted that 2021 “has got off to a flying start for long-term contracted ocean freight rates”, adding: “The January 2021 XSI shows one of the highest ever monthly rate increases, with a global jump of 5.9%. This leaves the index 4.5% up year-on-year, with few signs of relief on the horizon.

Patrik Berglund, Xeneta CEO, commented: “The high spot rates seen on key trading lanes over the past few months have cascaded down into contracted agreements, putting the squeeze on shippers worldwide. The reasons behind this are complex, but it’s driven by strong export traffic from China that far outstrips imports, leaving containers marooned in, for example, European ports when they’re desperately needed back in the Far East. “Added to that you have extreme congestion at some hubs – Maersk recently reported that between 30-35 ships were waiting to berth at Los Angeles/Long Beach – pushing up waiting times. This serves to further reduce already strained capacity, exacerbating the imbalance in supply and demand. And then of course there’s the ongoing impact of COVID-19, with increased online sales married to disruptions in supply chains and, unfortunately, outbreaks amongst essential workers. “Again, Los Angeles/Long Beach has been impacted here, only heightening the sense of turmoil.

Meanwhile, within these overall global figures, Far East imports on the XSI declined by 4.6% in Jan-21 to 91.94 points. This represents a new all-time low for the index and ensures it is down 11.1% when compared to the same period of 2020, Xeneta said. US imports on the XSI increased by 0.7% in Jan-21 to 122.97 points, while the index is up 0.5% year-on-year. Meanwhile, US exports declined by 6.2% to 83.27, taking the index to a new all-time low.

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

#### **No congestion relief in sight at US west coast ports**

Forwarder sees no let-up, as volumes remain ‘continuously high and will continue to be high for the weeks to come’, with little opportunity to clear backlogs during CNY. Congestion at the ports of Los Angeles and Long Beach has reached critical levels and there appears to be no end in sight, with the situation further compounded in recent days by a serious outbreak of coronavirus among dockworkers at the US west coast gateways, a senior freight forwarding executive has warned.

US forwarder Flexport’s VP for Ocean Freight, Nerijus Poskus, told a webinar this week: “It’s quite tough out there at the ports. A few days ago, there were 112 ships waiting at Los Angeles and Long Beach and of this number 33 were waiting for a berth. Storm conditions recently have also added to the problems, affecting schedules.” As to why the congestion is happening, he pointed to the surge in (import) volumes which were up by almost 50% in the second half of 2020 year over year.

“Last week, basically almost 300,000 TEU were waiting to be offloaded. That’s a lot of cargo. A second factor (in the congestion) is that you need staff and infrastructure to offload everything. The LA and Long Beach ports have a lot of coronavirus cases. “Last week alone, there were something like 700 amongst 9,000 ILW staff – a very high percentage of COVID infections. So, the port can’t serve the ships fast enough which has led to waiting times increasing to 10-14 days, in some cases longer, depending on the terminals. So, port executives, union leaders and elected officials initiated a vaccine campaign for dockworkers, fearing that the terminals may even have to be shut down if conditions (with the COVID crisis) get worse.”

He continued: “Thirdly, typically at this time of the year, you’d have more blank sailings through Chinese New Year (meaning fewer vessels to be handled at the ports). Last year, there were 88 blank sailings. Two years ago, it was 65-67 blank sailings. This year, it is seven on Asia-Europe trade and five on the Transpacific. “It’s not only that the volumes are high but that they are continuously high and they will continue to be high for the weeks to come – and the port will not have time to clear up the mess post-CNY.”

Poskus noted that there was much less congestion at the port of Rotterdam. “This is because the ships calling there, specifically on Asia-Europe routes, are much larger (than on the transpacific) and of 20,000 TEU (capacity) or so. Secondly, the port of Rotterdam is much more automated and the impact of coronavirus cases (on dockworkers) is not as great. Commenting on the significance of increased waiting times for vessels at LA and Long Beach Lars Jensen, CEO of Sea Intelligence Consulting, noted: “This is the equivalent of pulling five full transpacific services permanently out of action. The impact is massive.”

#### Schedule recovery cancellations

As reported today in *Lloyd’s Loading List*, major global container lines are being forced to cancel significant numbers of east-west services due to exceptionally long delays to vessels caused by congestion in Asian and North American ports. Reflecting the reality faced by box lines around the world, Hapag-Lloyd told customers this week that it was being forced to implement “a comprehensive schedule recovery plan to get vessels back in their intended positions”. The German line, the world’s fifth largest, said this “will result in some services not having a sailing for one to two weeks”, although the carrier stressed that this was in no way an indication that it was wanting to reduce capacity.

“It is important to emphasize that vessels will not be idling at any time and we will perform as many voyages as possible,” the line stressed. Although the disruptions are not exclusively caused by delays to Asia-US services, that trade was highlighted as the main cause. “The Transpacific Trade is currently going through unprecedented times,” the line explained. “The vessels, port infrastructure and inland logistics supporting the cargo movements are stretched beyond their capacity and have been so for several months. As a result, ships are waiting in line significantly longer than normal both in Asian and North American ports, leading to vessels being days and in many cases weeks behind their normally scheduled dates of call.

“We have in past years been able to react to such situations by adding recovery vessels to cover these open positions to ensure that we continued to offer a weekly service; however, as our fleets are fully deployed and stretched beyond capacity, this is regretfully currently not an option.

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

#### **Shocks to container system rarely lead to improvements**

Container shipping plays out in predictable cycles, and another one is under way right now. The cycle goes like this: Normal cargo flow is disrupted by a seismic and surprise external shock — be it a financial crisis, cyber attack, trade war, or global pandemic — precipitating a massive disruption in the system and yet again exposing its underlying weaknesses. Relationships and trust are strained or obliterated as customers are impacted. In response, they complain to regulators while seeking out new providers who can hopefully perform better. Eventually, the system recovers, even as the next unknown crisis looms, whether months or years down the road.

The impact on shippers’ revenues, profits, and ability to meet or exceed the expectations of their own customers can’t be minimized. International traders rely on their transportation and logistics suppliers in the same way they rely on any vendor, with high expectations for service on par with the expectations of their own customers. When logistics vendors fail to deliver for their customers — and even worse, when that occurs while rates are at all-time highs — the outrage is as real as the business impact, and corrective action is imperative.

As one shipper remarked recently on LinkedIn, reflecting the current environment of conflict, “Accountability and reliability are a thing of the past.” But it’s worth keeping the cycle in perspective because it has now played out multiple times over the past decade alone, and it always exposes the same thing:



because the global system of moving containerized cargo is highly vulnerable to external shock, it is unpredictable by its very nature and incapable of quickly recovering.

The capacity of the end-to-end container system is limited, including limited numbers of ships, containers, chassis, trucks, and terminal space. And as the market is experiencing currently, not only has capacity proved inadequate, but asset owners including carriers are signaling that they have no plans to invest to support future unpredictable volume surges, such as the spike in demand for personal protective equipment (PPE) and home goods spurred by the COVID-19 crisis and, most recently prior to that, the front-loading of imports from Asia to beat a Trump administration China tariff deadline at the end of 2019.

While the service reliability that shippers expect may in fact be a goal to which carriers and forwarders aspire, the inherent vulnerability of the system is such that during times of crisis, that goal is impossible to achieve, almost predictably so, leaving disappointment, blame, and frayed relationships in its wake. From the shippers' perspective, it's not an easy problem to solve. Changing vendors following service failures is part of the cycle, and it's happening again now. "Due to the service failures we're seeing currently, I'm seeing many long-standing relationships come to an end as customers seek out new vendors," said Dave Bennett, chief commercial officer at customs broker and forwarder Farrow.

And although that enables shippers to hold vendors accountable — and hopefully emerge with a better relationship — it doesn't solve the underlying problem. That problem is that system-wide disruption could strike again at any time, undermining the service of even the best-performing providers, and there is no guarantee that when that happens a new provider will perform any more successfully than the prior one did. Another solution could be changing source countries. But finding new source countries less vulnerable to shock, such as Mexico for shippers in North America, is a highly complex, time-consuming, costly, and risky process that many companies are not willing to undertake merely to mitigate transport risk.

Technology has not shown itself to be a solution either. Predictive analytics is improving shippers' ability to forecast when ships will arrive at a particular port based on current weather and prior performance. But that assumes more or less a business-as-usual scenario.

External shocks, such as the timing of the next devastating cyber attack or pandemic, are impossible to predict. Visibility can be valuable in supply chains, but if it's reduced to showing that your container is on a ship anchored off of the Los Angeles–Long Beach port complex, it's not exactly the most useful information. Neither is increasing safety stock in anticipation of disruption a solution. Besides being costly, holding excess inventory assumes a level of disruption that may not materialize for years to come. Inventory planning, which is complex enough during "normal" times due to rapidly growing e-commerce demand, is evolving using emerging data science tools such as demand sensing. But trying to anticipate the types of disruption that have been visited upon the container system over the past decade is next to impossible. That will be the key challenge going forward into the post-COVID-19 trade environment.

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 22 January 2021	Current Index 29 January 2021
Comprehensive Index			2868.95	2861.69
Service Routes				
Europe (Base port)	USD/TEU	20%	4394	N/A
Mediterranean (Base port)	USD/TEU	10%	4296	N/A
USWC (Base port)	USD/FEU	20%	3995	N/A
USEC (Base port)	USD/FEU	7.50%	4750	N/A
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	1934	N/A
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	2406	N/A
East/West Africa (Lagos)	USD/TEU	2.50%	6560	N/A
South Africa (Durban)	USD/TEU	2.50%	3152	N/A
South America (Santos)	USD/TEU	5.00%	8870	N/A
West Japan (Base port)	USD/TEU	5.00%	246	N/A
East Japan (Base port)	USD/TEU	5.00%	253	N/A
Southeast Asia (Singapore)	USD/TEU	7.50%	974	N/A
Korea (Pusan)	USD/TEU	2.50%	203	N/A

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