

## การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 3 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 31-Jan-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	450	950		
(North & South)	Subject to CIC at destination			
Thailand - Jebel Ali	800	1,400	Subject to ISOCC USD 34/TEU, USD 68/FEU	
	Subject to War Risk Surcharge: USD 35/TEU, USD 70/FEU			
Thailand - South Korea (Busan)	250	-	-	
Thailand - South Korea (Incheon)	300	-		
Thailand - Melbourne	1,350-1,450	2,700-2,850	FAF: USD 6/TEU	
Thailand - Sydney	1,650-1,750	3,300-3,450		
Thailand – Durban / Cape Town	2,600	5,000	Subject to ISOCC USD 51/TEU, USD 102/FEU	
	Subject to SCMC USD 30/BL			
Thailand – Europe (Main Port)	3,650	7,300	PSS: USD 500/TEU, USD 1,000/FEU ISOCC: USD 35/TEU, USD 70/FEU	
	Subject to ENS USD30/BL			
Thailand - US West Coast	3,100	3,900	-	
Thailand - US East Coast	3,700	4,600		
	Subject to Panama Low Water USD 30-60/Container			

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

สถานการณ์ค่าระวางในช่วงเดือนมกราคม 2564 สายเรือมีการปรับเพิ่มค่าระวาง ในเส้นทางเอเชีย 100 USD/TEU และ 200 USD/FEU 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 สำหรับเส้นทางแอฟริกาใต้ช่วงครึ่งเดือนหลังของเดือนมกราคม ค่าระวางปรับเพิ่มขึ้น 500 USD/TEU และ 800 USD/FEU ทำให้ค่าระวางอยู่ที่ 2,600 USD/TEU 5,000 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 6 USD/TEU

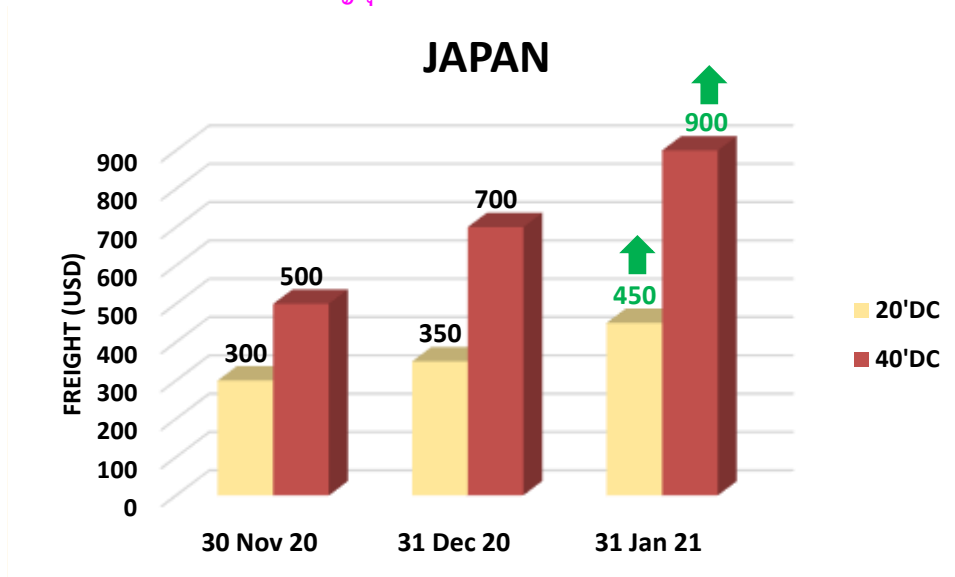
ในขณะที่ เส้นทาง Europe ค่าระวางช่วงครึ่งเดือนหลังของเดือนมกราคม ค่าระวางคงที่อยู่ที่ 3,650 USD/TEU และ 7,300 USD/FEU โดยมีการเรียกเก็บค่า Peak Season Surcharge ในอัตรา 500 USD/TEU และ 1,000 USD/FEU

ในขณะที่เส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนหลังของเดือนมกราคม ค่าระวางปรับลดลง 100 USD/ตู้ โดยค่าระวางฝั่ง West Coast อยู่ที่ 3,100 USD/TEU และ 3,900 USD/FEU และฝั่ง East Coast ค่าระวางอยู่ที่ 3,700 USD/TEU และ 4,600 USD/FEU ซึ่งขณะนี้พบปัญหาเรือเกิดความล่าช้า ทำให้มีการเปลี่ยนตารางเรือ โดยอาจมีกรณีที่เรือไม่สามารถไปต่อเรือแม่ได้ทัน ทั้งนี้ โปรดติดตามความคืบหน้าจากสายเรือที่ใช้บริการ

### CONTAINER FREIGHT RATE (REEFER)

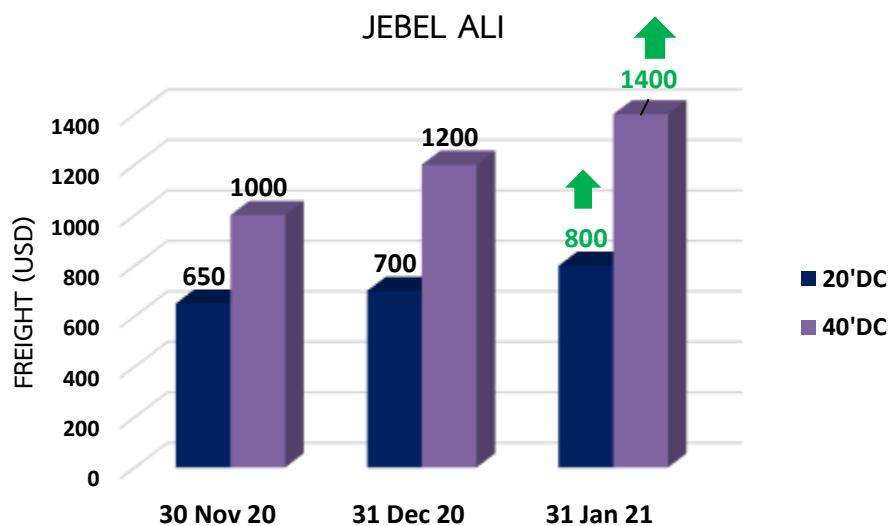
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	1,200	1,300	USD 30/TEU, USD 55/FEU	Effective till 31-Jan-2021
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	1,200	1,800	-	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	4,500	7,000	OBS: USD 52/TEU, USD 104/FEU + PSS: USD 500/TEU, USD 1,000/FEU	

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



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

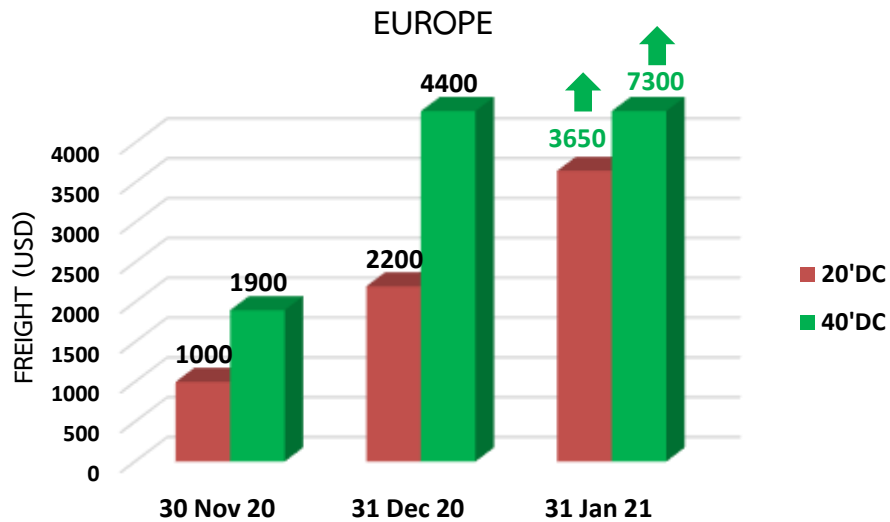
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง ไทย-Jebel Ali เดือน พ.ย. ปี 2563 ถึง ม.ค. ปี 2564



Subject to

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

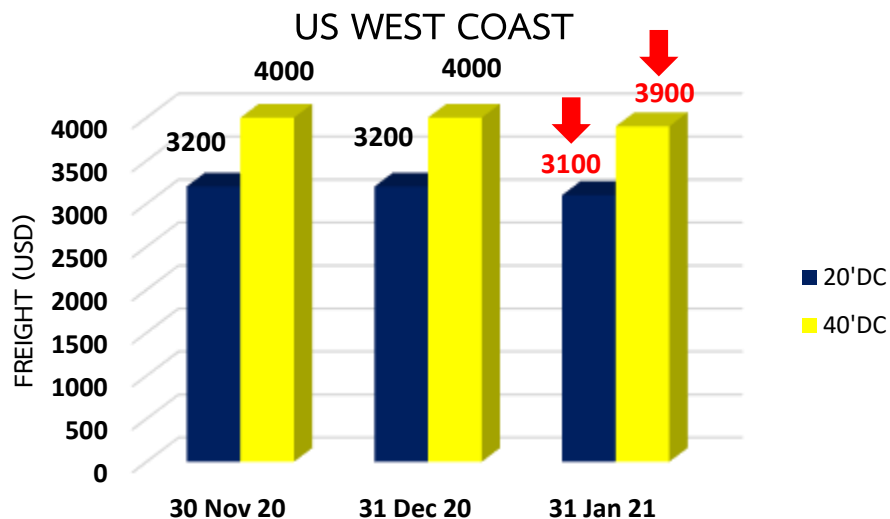
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง ไทย-ยุโรป เดือน พ.ย. ปี 2563 ถึง ม.ค. ปี 2564



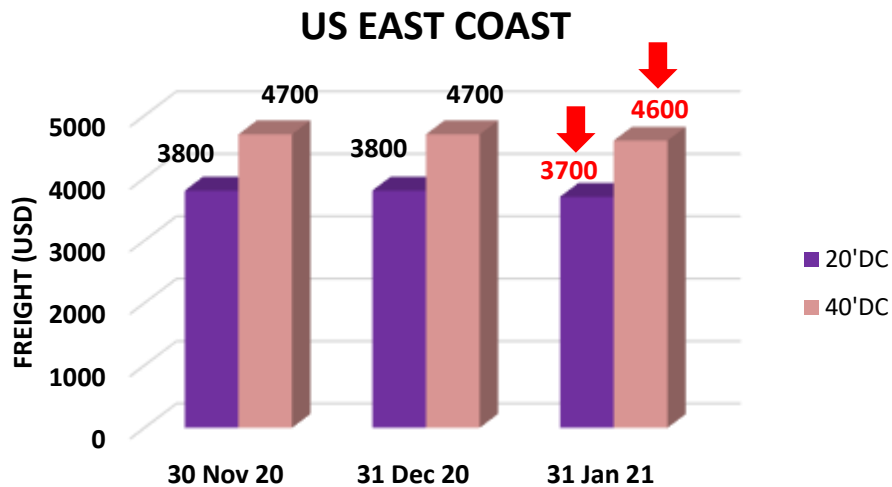
Subject to

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

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



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



Subject to Panama Low Water Surcharge: USD 30/Container

➤ รวบรวมประกาศสำคัญจากสายเรือ

สายเรือ Sealand

- ประกาศแจ้งปรับการเรียกเก็บค่า Environmental Fuel Fee (EFF) สำหรับทุกเส้นทาง มีผลตั้งแต่วันที่ 1 มีนาคม 2564 โดยมีรายละเอียดดังตาราง

Scope	20'Dry/OT/FR	40'Dry/40'Hdry/OT/FR	45' Hdry	20'Reef	40'HRef
All countries	USD 2	USD 4	USD 5	USD 4	USD 7

**Cargo rollovers rose at most major box ports in December**

High levels of demand are causing port congestion and increased cargo delays, with rollovers by major carriers rising from 35% in November to 37% in December. Many key transshipment ports and the leading container lines are continuing to see elevated levels of cargo rollovers, according to research from Ocean Insights. Cargo levels remain far above seasonal averages, causing further delays to cargo, which is increasingly lying stranded at the quayside. “Of the 20 global ports, 75% saw an increase in the levels of rollover cargo in December compared with the previous month,” said Josh Brazil, the analyst company’s chief operations officer.

“Major transshipment facilities such as Port Klang in Malaysia and Colombo in Sri Lanka recorded 50% or more of cargo delayed, with the world’s largest transshipment hub in Singapore and leading primary ports, such as Shanghai and Busan, rolling over more than a third of their containers last month.” Overall rollover levels increased to 37% month on month in December, averaged across the ports surveyed, which includes facilities in all the significant cargo regions of Europe, the US and Asia as well as less cargo intensive regions such as Latin America. “While rollover levels vary considerably from 62% in Italy’s Gioia Tauro to only 22% in Salalah, it is worth noting that Shanghai’s 37% rollover level is likely considerably higher in actual container numbers than Cartagena’s 56% rollover rate,” Ocean Insight said.

The major carriers had also seen an overall increase in rollover values from 35% in November to 37% in December. CMA CGM and Ocean Network Express saw more than 50% of cargo left at the departure port,

Ocean Insight added. Cosco, Evergreen, and Hapag-Lloyd also saw their percentage of rollovers rise in December compared with November. CMA CGM's rollover rates rose from 48% to 51%, ONE's rose from 45% to 50%, and Hapag-Lloyd's rose from 42% to 46%, while for Cosco, the proportion rose from 37% to 43%, and for Evergreen it rose from 37% to 44% – the largest percentage point rise among any of the major carriers.

Alliance partners Maersk and Mediterranean Shipping Co managed to stem the rise of rollover cargo month on month, both recording the same level of rollovers in December as in the previous month. “As the Covid-19 pandemic threw global markets into disarray, consumer behavior changed dramatically, leaving the carriers as well as shippers stranded, either with goods they could not sell, or, in the second half of the year, with goods that cannot be moved,” Ocean Insight said. “The latter crisis stems in part from a lack of containers, as the pandemic has caused box repositioning problems. Today, even if a beneficial cargo owner can get an empty container for their cargo, there is no guarantee that the cargo will make it on to a ship.”

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

### Shippers urged to rethink container allocation strategies

Shippers need to focus on better capacity forecasting, sharing of benefits with carriers, and concentrating volume with fewer partners to navigate what will be a tricky container allocation environment in 2021. Container allocations refer to the process of divvying up a shipper's volume among various vessel operators and non-vessel operating common carriers (NVOs) on an annual and more short-term basis. Allocations are built on a mixture of annual contracts — based on projected volume associated with a negotiated rate, also known as minimum quantity commitments (MQCs), and shorter term, ad hoc needs — so they essentially act as ongoing projections for what volume a shipper will send to a specific carrier on a given week.

In a sense, allocation strategy allows a shipper to avoid having the space allocated to them weekly reduced to a non-scientific MQC-divided-by-52-weeks equation. In an ideal environment, shippers would convey their ongoing volume based on rolling projections, and container lines and NVOs would be able to meet those varying allocations based on the advanced notice. However, the second half of 2020 threw many of those allocation projections out the window. One retailer, who did not want to be identified, told JOC.com it has traditionally forecast its allocation needs to container lines 10 weeks out on a rolling basis.

“That didn't work last year,” the retailer said. “They continue to stick to MQC-divided-by-52 set in early 2020, prior to the pandemic, and in some cases they want a peak season surcharge to even give us space according to MQC divided by 52. This year our forecasts are going to be better, since we have orders out there further than normal due to increased demand in our planning scenarios.”

#### Allocations go out the window

Last year shone a light on the fact that a shipper's ability to forecast its capacity needs more accurately and further into the future is only one part of an allocation strategy. “For decades, shippers and freight forwarders have been squeezing carriers and went shopping, exchanging their partners whenever offered rates did not match their expectations,” said Jonas Krumland, CEO of logistics software provider Logward, a spinoff of the German forwarder Leschaco. “The same players who've demonstrated to be short-term opportunists are now surprised at being kicked off carriers' loading lists when, for once, the leverage shifted to the other side.”

Krumland said the widespread anecdotes of shippers struggling with blank sailings, tight capacity, premiums required to get loaded, and cargo rolls belie the reality that some cargo owners managed the turmoil of the last year better than others. “What too few people talk about is that numerous companies managed the 2020 chaos very well, backed by solid partners,” Krumland said. “No matter which metrics you look at —

total true lead times, rolling ratio, booking confirmation speed and reliability — those of our customers who invested in profound allocation management suffered roughly 70 percent fewer rollings than the opportunists.”

Shippers need to think about what Krumland framed as a “certain amount of open capacity in the market” that container lines can allocate to shippers in any way they see fit. “Guess what? Carriers don’t randomly create their vessel load plans,” he said. “Instead of just rolling the dice, carriers rationally prioritize customers by profitability and strategic importance.” “Look at your carrier relationships as long-term partnerships in which each partner wants to help and support the other.”

#### Forecast by port pairs and strings

An example of mutual allocation management, according to Krumland, should include a yearly allocation commitment of volumes broken down by port pairs and assigned to service strings. It should include transparency into sailing schedules and regular reviews of performance on both sides. That should include rolling and shared forecasts on a weekly basis, at least eight weeks out. “There will be blank sailings and capacity shortages in 2021 as well,” he said. “So, you want to know exactly in which week you may face bottlenecks. Knowing which of your purchase orders are affected by a discovered bottleneck enables you to prioritize your shipments. Good allocation management will not ensure that 100 percent of your shipments proceed as planned. It ensures that you are in control to find the right compromises whenever it gets chaotic.” The challenge, according to Chris Kirchner, CEO of logistics software provider Ssync, is that data resides in systems within multiple parties — the shipper, the logistics services provider, and the carrier — and in both structured and unstructured formats.

“This makes it very difficult to get a[n] accurate picture of what is going on, and what needs to be done at various points in the allocation process,” Kirchner said. “The operational challenge is that allocation is a fluid situation taking place around the world on a continuous basis. It relies on carrier confirmations that can fluctuate, especially in today’s environment, and requires a lot of human attention in most operations.” The traditional process has been to flow contract rate data from spreadsheets and emails into widely used booking systems that only represent a sliver of the process. Kirchner’s contention is that the mismatch, for both forwarders and shippers, creates a system that’s set up to fail.

#### Traffic light approach

Krumland advocated for a “traffic light” approach to measure shippers’ commitment on an annual basis and at the weekly forecast level to determine which port pairs, in which time frame, both partners are either over- or underperforming. “This shows shippers quickly where they may find open capacity according to their agreements,” he said. Another suggestion from Krumland: Shippers that previously relied only on direct contracts with carriers but are considering adding an NVO as a safety valve should openly communicate such plans with their container line partners.

“If shippers feel the necessity to add NVOs, it should be openly communicated or even discussed with their awarded carriers,” he said. “The worst scenario would be to place volumes with an NVO or forwarder behind the carriers’ backs. It may happen that a forwarder finds capacity on vessels for which the operating carriers themselves turned shippers down.” Krumland also urged shippers to consider spreading their volume commitments around to hedge their bets, consolidating volume with fewer carriers to increase leverage with each one. “No large and diverse shipper can rely on only one partner, but spreading volumes should be limited,” he said, suggesting shippers have a maximum of five core carriers on a global basis, and to spread those volumes out by region, “so that carriers may still plan their service usage better.”

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



**Volume surge, not blankings, behind supply chain problems**

Container lines have been accused of restricting capacity to hold rates firm, but analysis shows that deployed capacity rose rather than fell despite blanked sailings. A large transfer of volumes from the first half of 2020 into the second half of the year is a substantial element of the current crisis in container shipping rather than any carrier-imposed restrictions on capacity.

Data from Sea-Intelligence shows that after a spate of blankings in the first half of last year, there has since been a net growth in deployed capacity. While there had been blanked sailings during the second-half of the year, as rates began their steady rise to record-breaking levels, lines had “more than compensated” for the blankings with the injection of additional capacity, resulting in a net growth of offered capacity, Sea-Intelligence said. The additional capacity had been achieved through the use of extra loaders on some trade lanes and the phasing-in of ever-larger tonnage. “When combining these facts, there is no basis for saying that because the carriers are blanking sailings, then the spot rates are going up,” it said. “The starting point has to be that the carriers have substantially increased the total capacity in the markets.” This remained true despite an increase in blanked sailings towards the end of 2020.

“Since July, the amount of capacity brought in through larger vessels and extra loaders have more than exceeded the amount of capacity removed through blank sailings,” said Sea-Intelligence. “There have been periods where the growth in capacity injection was pushing 30%, despite some sailings being cancelled.” Blankings that had taken place recently had been driven by considerations other than artificially holding up freight rates, it added. Delays at a number of ports, particularly on the US west coast, along with disruptions caused by positive coronavirus tests among crew, had delayed vessels to the extent that scheduled sailings had to be cancelled.

Additionally, a lack of demand on one particular port pairing may have facilitated taking a vessel off a voyage to be redeployed elsewhere where there was high demand. “Overall, the data does not support the notion that the blank sailings are being used by carriers to drive the current spike in spot rates,” Sea-Intelligence said. “Hence the notion that the current problems are partly due to blank sailings, is myth.” What had not changed, however, was the total number of containers shifted during the year. But a “dramatic deviation” from normal seasonality had thrown the entire supply chain into disarray, Sea-Intelligence said.

The seasonal decline following Chinese New Year is usually around 2.4m teu, but last year fell by 3.2m teu. “Under normal circumstances we then see volumes gradually fill up following the slump, but in 2020 this dropped further to below 6m teu when compared to the straight average and 5 m teu when adjusted for seasonality,” the analyst said. Peak season recovery doubled in 2020, with more than 1m teu of additional demand being added each month. “As it is impossible to rapidly increase capacity beyond a certain point, this creates significant problems in the supply chain,” it said. “Total annual volume in 2020 is essentially at the same level as 2019. “But it is split in such a way that 5m additional teu is shifted to the later part of the year, and compared to the annual average, we are seeing a spike above 6m teu being shifted.”

Source: <https://www.lloydsloadinglist.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 15 January 2021	Current Index 22 January 2021
Comprehensive Index			2885	2868.95
Service Routes				
Europe (Base port)	USD/TEU	20%	4413	4394
Mediterranean (Base port)	USD/TEU	10%	4296	4296
USWC (Base port)	USD/FEU	20%	4054	3995
USEC (Base port)	USD/FEU	7.50%	4800	4750
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	1982	1934
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	2406	2406
East/West Africa (Lagos)	USD/TEU	2.50%	6630	6560
South Africa (Durban)	USD/TEU	2.50%	3298	3152
South America (Santos)	USD/TEU	5.00%	8907	8870
West Japan (Base port)	USD/TEU	5.00%	244	246
East Japan (Base port)	USD/TEU	5.00%	251	253
Southeast Asia (Singapore)	USD/TEU	7.50%	958	974
Korea (Pusan)	USD/TEU	2.50%	203	203

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