

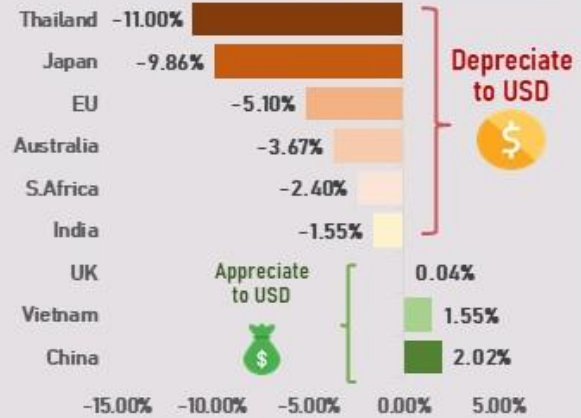
## Weekly Briefing (8 NOV 2021)



### 01 THB rate / currencies

			
USD	EUR	GBP	AUD
33.30	38.49	44.95	24.64
			
CNY	JPY	INR	VND
5.20	0.29	0.45	0.0015

### 02 Exchange rate trend to USD (YTD)



### 03 Crude Oil price & Gold (1-5 Nov)



### 04 Freight Index (SCFI Comprehensive Index)



### 05

## Weekly Top's Stories



รายละเอียด  
ข่าว/บทความ



1. Monthly Economic Indicators รายละเอียดเพิ่มเติม : Scan QR Code



2. "เงินบาท" เปิดตลาดแข็งค่าที่ 33.29 หลัง "เฟด" ชะลอขึ้นดอกเบี้ยและลด QE  
รายละเอียดเพิ่มเติม : <https://bit.ly/3GxR0ii>



3. Here's an update for Bangladesh: indefinite transport strike  
รายละเอียดเพิ่มเติม : <https://bit.ly/3ESx30E>

# การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 44 พ.ศ. 2564



**สรุปค่าระวางเรือประจำสัปดาห์**

"หมายเหตุ: อัตราค่าระวางที่ปรากฏเป็นอัตราฐานของสายเรือที่ประกาศเป็นทางการ ซึ่งอาจต่ำกว่าอัตราที่มีการเรียกเก็บจริงจากผู้ส่งออก"

**CONTAINER ALL IN FREIGHT RATE (DRY)**

ROUTE	SIZE		Low Sulphur Surcharge (LSS)	Remark
	USD/20'	USD/40'		
Thailand - Shanghai	650	1,200	Subject to ISOCC USD 46/TEU, USD 92/FEU	Effective till 30-Nov-2021
Thailand - Qingdao	700	1,300		
Thailand - Hong Kong	400	700		
Thailand - Japan (Main Port)	500	1,000		
Thailand - Kaohsiung	550	1,100		
Thailand - Klang	500	900	Subject to ISOCC USD 27/TEU, USD 53/FEU	
Thailand - Jakarta	500	900		
Thailand - Ho Chi Minh (Cat Lai)	400	750		
Thailand - Singapore	450	950		
Thailand - Manila (North & South)	700	1,600		
	Subject to CIC at destination			
Thailand - Jebel Ali	3,900	6,800	Subject to ISOCC USD 45/TEU, USD 90/FEU War Risk Surcharge: USD 35/TEU, USD 75/FEU	
Thailand - South Korea (Busan)	300	600	LSS: USD 80/TEU, USD 160/FEU	
Thailand - South Korea (Incheon)	350	700		
Thailand - Nhava Sheva	4,300	5,900	ISOCC: USD 36/TEU, USD 72/FEU	
Thailand - Melbourne	3,050-3,150	6,100-6,250	FAF: USD 95/TEU, USD 190/FEU	Effective till 31-Oct-2021
Thailand - Sydney				
Thailand – Durban / Cape Town	4,300	7,600	Subject to ISOCC USD 75/TEU, USD 150/FEU	Effective till 30-Nov-2021
	Subject to SCMC USD 30/BL			
Thailand – Europe (Main Port)	7,400	13,200	ISOCC: USD 88/TEU, USD 176/FEU PSS: USD500/TEU, USD1,000/FEU	Effective till 14-Nov-2021
	Subject to ENS USD 30/BL			
Thailand - US West Coast	Standard Rate: 11,620	Standard Rate: 14,150/14,300		Effective till 7-Nov-2021
Thailand - US East Coast	Standard Rate: 12,620 Premium Rate: 14,460	Standard Rate: 15,400/15,700 Premium Rate: 18,200		
	Subject to Panama Low Water USD 30-60/Container			

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

สถานการณ์ค่าระวางในช่วงเดือนพฤศจิกายน 2564 ค่าระวางในเส้นทางเอเชียปรับเพิ่มขึ้นในหลายเส้นทาง โดยเส้นทาง Shanghai ค่าระวางเพิ่มขึ้น 100 USD/FEU ทำให้ค่าระวางอยู่ที่ 650 USD/TEU และ 1,200 USD/FEU เส้นทาง Klang ค่าระวางเพิ่มขึ้น 100 USD/TEU และ 100 USD/FEU ทำให้ค่าระวางอยู่ที่ 500 USD/TEU และ 900 USD/FEU และเส้นทาง Japan ค่าระวางเพิ่มขึ้น 100 USD/FEU ทำให้ค่าระวางอยู่ที่ 500 USD/TEU และ 1,000 USD/FEU สำหรับเส้นทาง Durban ค่าระวางปรับเพิ่มขึ้น 100 USD/TEU และ 200 USD/FEU ทำให้ค่าระวางอยู่ที่ 4,300 USD/TEU และ 7,600 USD/FEU ส่วนเส้นทาง Hong Kong ค่าระวางคงที่อยู่ที่ 400 USD/TEU และ 700 USD/FEU โดยค่า Low Sulphur Surcharge ปรับลดลงเล็กน้อยตามราคาน้ำมันในตลาดโลก

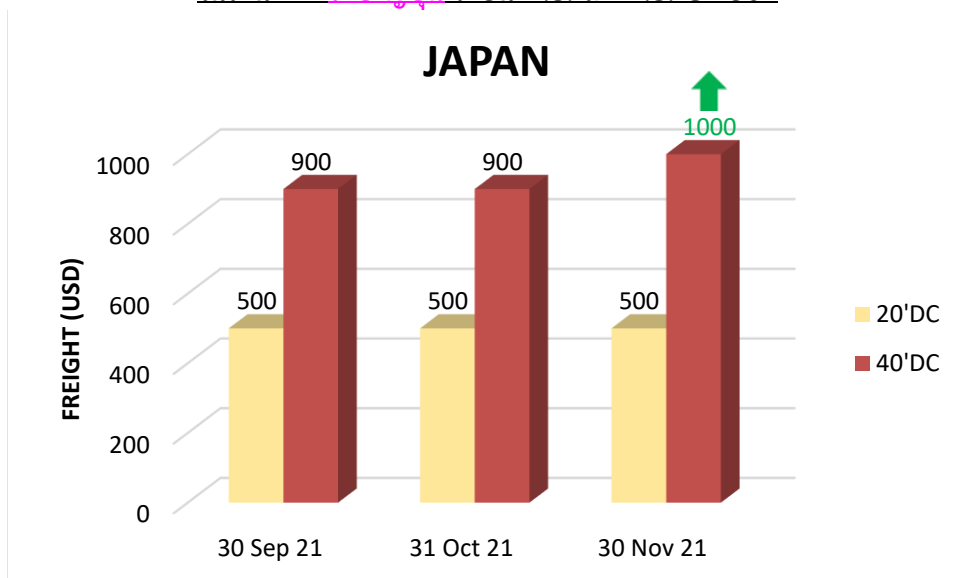
ส่วนเส้นทางออสเตรเลีย ค่าระวางในเดือนตุลาคม อยู่ระหว่าง 3,050-3,150 USD/TEU และ 6,100-6,250 USD/FEU ส่วนค่าระวางในเดือนพฤศจิกายน รอยืนยันข้อมูลอีกครั้งหนึ่ง ในขณะที่ เส้นทาง Europe ค่าระวางช่วงครึ่งเดือนแรกของเดือนพฤศจิกายน ค่าระวางคงที่อยู่ที่ 7,400 USD/TEU และ 13,200 USD/FEU โดยมีบวกเพิ่มค่า LSS และ PSS ในอัตราเดิม

ส่วนเส้นทางสหรัฐอเมริกา ช่วงสัปดาห์แรกของเดือนพฤศจิกายน ค่าระวางปรับเพิ่มขึ้น 560 USD/TEU และ 700 USD/FEU ทั้งฝั่ง West Coast และ East Coast โดยค่าระวางที่เป็น Standard Rate ฝั่ง West Coast อยู่ที่ 11,620 USD/TEU และ 14,150 USD/40', 14,300 USD/40'HQ และฝั่ง East Coast ค่าระวางอยู่ที่ 12,620 USD/TEU และ 15,400 USD/40', 15,700 USD/40'HQ ส่วนค่าระวางที่เป็น Premium Rate อาจสามารถ Apply ได้เฉพาะเรือบางลำ ทั้งนี้ สถานการณ์ปัจจุบันยังคงพบปัญหาการระวางเรือเต็ม ขอให้วางแผนการจองล่วงหน้า

### CONTAINER FREIGHT RATE (REEFER)

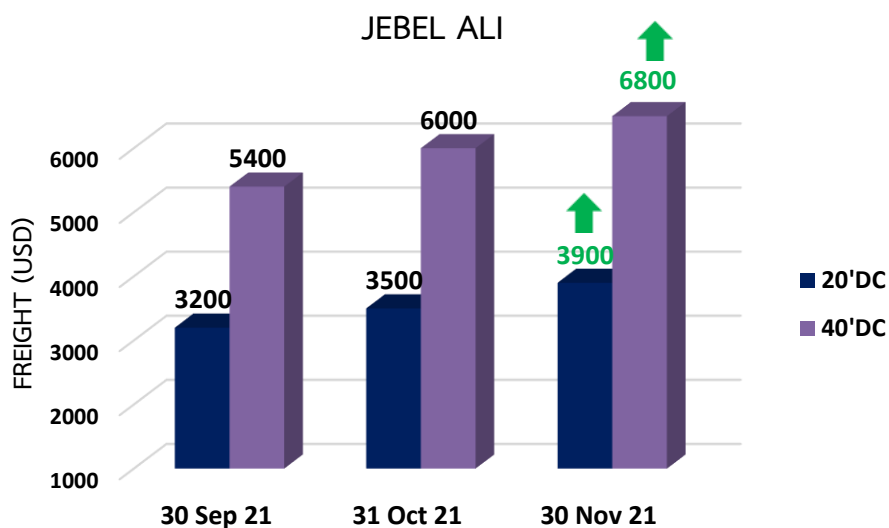
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	-	1,300	USD 138/FEU	Effective till 30-Nov-2021
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	1,400-1,500	1,700-1,900	USD 41/TEU, USD 82/FEU	Effective till 31-Dec-2021
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	9,000	13,000	OBS: USD 256/TEU, USD 512/FEU + PSS: USD 500/TEU, USD 1,000/FEU	Effective till 15-Nov-2021
London Gateway / Southampton	10,000	14,000		

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง **ไทย-ญี่ปุ่น** เดือน ก.ย. ถึง พ.ย. ปี 2564



Subject to Low Sulphur Surcharge (Sep.-Oct.21): USD 57/TEU และ USD 115/FEU  
(Nov.21): USD 46/TEU และ USD 92/FEU

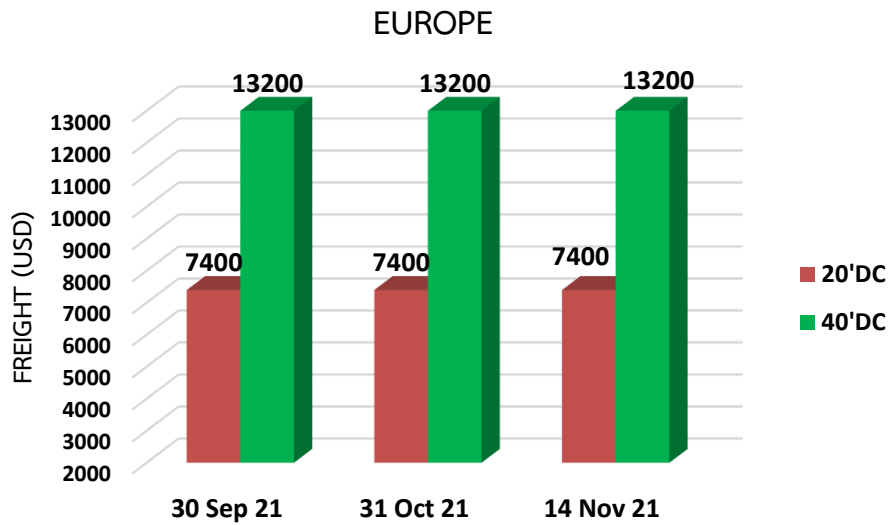
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง **ไทย-Jebel Ali** เดือน ก.ย. ถึง พ.ย. ปี 2564



Subject to

- Low Sulphur Surcharge (Aug.-Oct 21): USD56/TEU และ USD112/FEU  
(Nov. 21): USD45/TEU และ USD90/FEU
- War Risk Surcharge: USD35/TEU และ USD70/FEU

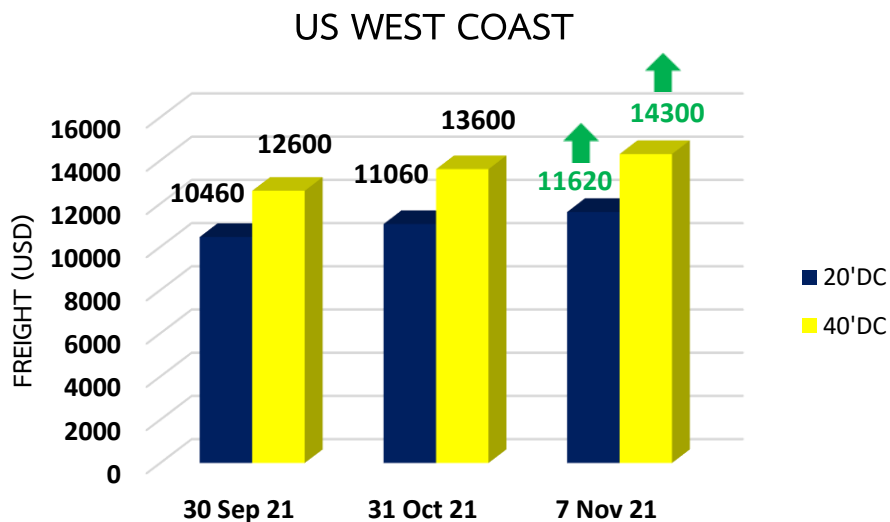
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง ไทย-ยุโรป เดือน ก.ย. ถึง พ.ย. ปี 2564



Subject to

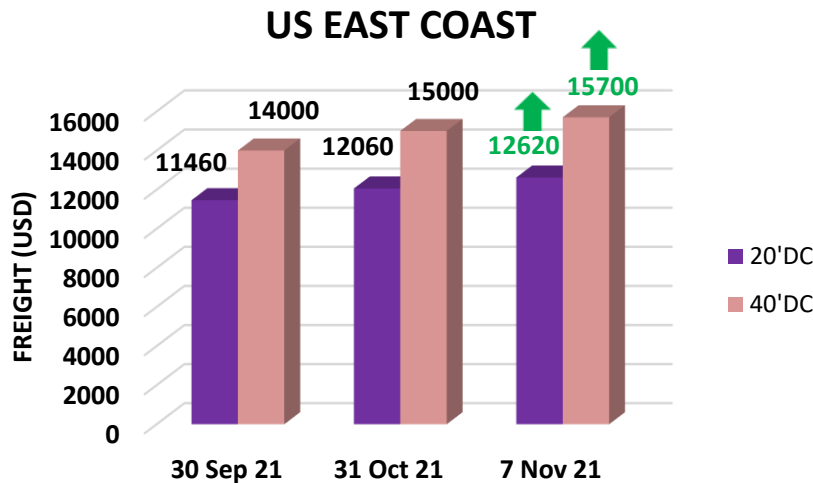
- ISOCC (Sep.-Nov. 21): USD88/TEU, USD176/FEU
- ENS: USD30/BL
- PSS: USD500/TEU, USD1,000/FEU

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





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



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

➤ รวบรวมประกาศสำคัญของสายเรือ

สายเรือ ONE

- ประกาศแจ้งเรียกเก็บค่า Ports of Los Angeles & Long Beach Container Excess Dwell Fee โดยตั้งแต่วันที่ 15 พฤศจิกายน 2564 หากตู้สินค้าเข้าไปยังท่าเรือ Los Angeles และ Long Beach อยู่ภายในท่าเกินกว่า 8 วัน จะต้องถูกเรียกเก็บค่าใช้จ่ายดังกล่าว ซึ่งมีรายละเอียดการเรียกเก็บดังตาราง

**Local import excess dwell fee begins on day 9 as follows:**

Days on Terminal	Daily Charge (USD)	Total Charge (USD)
9	\$100	\$100
10	\$200	\$300
11	\$300	\$600
12	\$400	\$1,000
13	\$500	\$1,500
13 +	\$100 per day increase with no maximum.	

**Intermodal/ Rail excess dwell fee begins on day 6 as follows:**

Days on Terminal	Daily Charge (USD)	Total Charge (USD)
6	\$100	\$100
7	\$200	\$300
8	\$300	\$600
9	\$400	\$1,000
10	\$500	\$1,500
10 +	\$100 per day increase with no maximum.	

สายเรือ CNC

- ประกาศแจ้งปรับการเรียกเก็บค่า Low Sulphur Surcharge (LSS) สำหรับสินค้าในเส้นทาง Intra-Asia ซึ่งมีผลตั้งแต่วันที่ 1 ธันวาคม 2564 โดยมีรายละเอียดดังตาราง

### LSS Short Distance

Container Type	Currency	20'	40'	40'HC
Dry	USD	60	120	120
Flat Rack/ Open Top/ Tank/ Other Special Equipment	USD	60	120	120
Refrigerated	USD	90	180	180

### LSS Long Distance

Container Type	Currency	20'	40'	40'HC
Dry	USD	106	212	212
Flat Rack/ Open Top/ Tank/ Other Special Equipment	USD	106	212	212
Refrigerated	USD	159	318	318

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	Short	Long	Long	Long	Long	Long	Long	Long	Long	Long
PRD	Short	Short	Short	Short	Short		Short	Short	Long	Long	Long	Long	Long	Long	Long	Long	Long
HK	Short	Short	Short	Short	Short	Short		Short	Short	Long	Short	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	Short	Long
TH	Long	Long	Long	Long	Long	Long	Long	Long	Short		Short	Short	Short	Short	Short	Long	Long
KH	Long	Long	Long	Long	Long	Short	Short	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	

### สายเรือ MSC

- ประกาศแจ้งเรียกเก็บค่า Ports of Los Angeles & Long Beach Container Excess Dwell Fee โดยตั้งแต่วันที่ 15 พฤศจิกายน 2564 หากตู้สินค้าเข้าไปยังท่าเรือ Los Angeles และ Long Beach อยู่ภายในท่าเกินกว่า 8 วัน จะต้องถูกเรียกเก็บค่าใช้จ่ายดังกล่าว ซึ่งมีรายละเอียดการเรียกเก็บดังตาราง

#### Local Import Loaded Container

Days on Terminal	Daily Charge (\$)	Cumulative Charge (\$)
9	\$ 100	\$ 100
10	\$ 200	\$ 300
11	\$ 300	\$ 600
12	\$ 400	\$ 1,000
13	\$ 500	\$ 1,500
More than 13	Incremental \$100 increase per day with no limit	

#### Intermodal Import Loaded Container

Days on Terminal	Daily Charge (\$)	Cumulative Charge (\$)
6	\$ 100	\$ 100
7	\$ 200	\$ 300
8	\$ 300	\$ 600
9	\$ 400	\$ 1,000
10	\$ 500	\$ 1,500
More than 10	Incremental \$100 increase per day with no limit	



### Transpacific ocean freight discounting continues in November

Digital forwarder Shifl says a big drop last month in China-US prices for some agents has been maintained, although other sources say overall spot prices have stayed close to historic high levels. Digital forwarder Shifl says a significant drop last month in China-US ocean freight spot prices being paid by some freight forwarders has been maintained, with the firm confident rates will drop further after lunar New Year, although other sources say overall spot prices have remained very high.

Although the various ocean freight industry pricing indices report a mixed picture in terms of spot prices, which remain hugely inflated compared with pre-pandemic rates, Shifl said its experience indicated that “the relief that some shippers had from the drop in China-US spot rate market in the first week of October 2021 seems to be continuing into November 2021”.

While overall average spot market pricing appears to have remained high, there seems to have been an opportunity for some forwarders to source space at discounted rates in recent weeks, as non-vessel-operating common carriers (NVOCCs) that had booked space in advance had been left with unsold capacity due to the recent production cuts in China caused by power outages. Shifl said the level of co-loading of cargo had declined in recent weeks and unsold transpacific space had been sold last-minute to freight forwarders at a discount.

#### Last-minute discounts

It reported that with Chinese manufacturers “throttling production due to the power crisis and the off-season coming into view, competition for freight capacity in terms of containers and vessel space has fallen off”, with some co-loaders that “took advantage of the price increases and congestion by buying up capacity now looking to unload it as quickly as possible”. These factors led Shifl to report that China-US container spot freight rates fell sharply in early October with rates for shipping a 40 ft container from China to Los Angeles dropping from a high of \$17,500 to \$8,500 – a drop of more than 50% compared to September 2021. For China-US East Coast shipping, rates dropped by 28.2% in the space of one month, down to \$14,000 per container by early October from a high of \$19,500 in September.

Shabsie Levy, CEO and founder of Shifl, said those lower pricing levels had been broadly maintained for freight forwarders into November, “with the holiday shopping rush seemingly over and the already ordered goods sitting inside thousands of containers on many ships across the USA”. According to Shifl’s data, container spot rates for November 2021 on the China-US East Coast route are currently around \$13,800 per container in November – a similar level to early October and down 29% from \$19,500 in September 2021. “Based on the current market conditions, I visualise a slight uptick in rates just before Chinese New Year,” said Levy. “After Chinese New Year, as we head into the traditionally quieter months, I’m confident we will see the rates on a stable downward trajectory.”

#### Falling rates expected from February

However, Shifl has warned that this temporary reprieve could soon be overshadowed by a growing backlog of unfulfilled orders, as Chinese energy rationing policies and the impact of COVID-19 shutdowns “throttle factory output, meaning that US and EU manufacturing orders are not being filled on time. While US and EU businesses scramble to diversify their supply chains, inventory shortages and price increases will become more pronounced.” Levy noted: “For shippers with inventory still in China, access to capacity at lower rates is great news. But the big question now is whether or not there will be products to fill these containers.” In terms of long-term rates, he said his company had been already seeing long-term rates for shipping 40-foot containers from China to the US go below \$5,000.

Other rates sources differ

According to container rates digital specialist Xeneta and its Xeneta Shipping Index (XSI) short-term rates index, average prices last week were down by around 7% to US\$8,409 per feu compared with their peak of just over US\$9,000 on 1 October, although its figures exclude the priority loading surcharges that have become a major pricing factor in recent months. For Far East to north Europe, prices remain close to their historic highs at \$13,869, down from a peak of \$14,282 last week.

Digital booking platform and rates specialist Freightos, which includes a component for priority loading surcharges in its pricing, reported last week that although Asia-US West Coast rates are 9% below the mid-September peak-season high, prices climbed 16% last week to \$18,730/FEU, although its Freightos Baltic Index (FBX) includes data for shipments from southeast Asia as well as northeast Asia or just China.

Judah Levine, head of research at Freightos noted: “Even with the height of peak season demand behind us, elevated or climbing rates may show that low inventory levels and still-elevated consumer demand for goods are keeping volumes high. Most acutely though, congestion at LA/Long Beach is also keeping pressure high during what is normally the lull between peak season and Lunar New Year.”

Port congestion persists

As highlighted in *Lloyd’s Loading List*, Sea-Intelligence estimates that worldwide, congested ports are sucking up 12% of global container capacity, effectively reducing supply while demand stays elevated. “In LA/Long Beach, the current crisis is the lack of space in its container yards choked with loaded imports and empty containers. With no space, ships aren’t getting unloaded as fast as possible and trucks can’t return empty containers that are in turn filling area warehouses and occupying chassis badly needed to pick up imports,” Levine noted. He highlighted those ports are rolling out several initiatives aimed at freeing up space, including a penalty on ocean carriers for containers that don’t get picked up on time that the port of LA said was reportedly already having an impact.

Large importers targeted

Although carriers will pass fines on to importers, and many importers are not intentionally leaving boxes unclaimed, Levine said it seems the targets are those very large whose containers are usually allowed extended time at the ports. “With their own warehouses full with holiday goods, large retailers may be storing non-urgent containers at the ports. So, the fine is designed to push this group toward other storage options,” Levine noted. “Also, this week, the ports announced that some carriers will send dedicated ‘sweepers’, ships brought in just to remove empty containers from the yard, and that alternate nearby sites are going to be opened to hold imports and receive empty containers.”

‘Little change’

In his monthly analysis of the ocean freight market on behalf of the Baltic Exchange, Vespucci Maritime CEO Lars Jensen said little had changed last month, noting: “October 2021 was, to all intents and purposes, a month without major developments. This might seem like an odd statement as the market was highly out of line with the pre-pandemic normality and supply chain disruptions were hitting the headlines of not just the industry press but also the mainstream media. However, from a data-driven perspective the most apt description of October was that nothing materially changed compared to September.”

In terms of freight rates, he argued that “October did not bring much relief to shippers. The pattern varies slightly across trade lanes, but the overall development is quite well aligned.” According to Jensen, the FBX rate index shows us that “on the transpacific, rates peaked in mid-September and then declined somewhat coming into October”, although how we should interpret this was “a ‘glass half-full or half-empty’ situation”.

Jensen added: “Rates to the US West Coast decline by some US\$4,000/FFE, which on the surface appears as a major decline. But this still meant a rate of \$16,000/FFE by mid-October and by end-October it had climbed back to almost \$17,500/FFE. A similar development was seen to the US East Coast where a rate decline of \$2,000/FFE only served to reduce the overall level to a still extremely high \$20,000/FFE by the end of October.”

On Asia-Europe, he noted that rates went from \$14,700/FFE to \$14,200/FFE whereas rates to the Mediterranean once more reached a new record high by the end of October surpassing the previous peak in mid-September by \$100. “Basically, all quantifiable market data point in the same direction: The market has neither improved nor worsened in the past month,” said Jensen.

#### Forward-looking concerns

“Looking slightly forward, this is concerning. Usually October is a quiet month, mainly impacted by a seasonal lull driven by the Golden Week holiday in China. It appears that all this seasonal impact amounted to was to stall a development that had deteriorated sharply during the peak season.” Jensen said “all eyes are now on Chinese New Year 2022”, which happens on 1 February. “Traditionally this would lead to an expectation of strong volume developments throughout January. However, the extreme disruptions in the market combined with the lack of material improvement in October is highly likely to cause many shippers to fast-track their logistics requirements in order to have sufficient buffer in their supply chains,” Jensen added. “This means we should expect a surge in cargo to begin during November and hence a significant likelihood of worsening problems and increasing rates.”

#### Poor schedule reliability

This all comes against a backdrop of a still highly disrupted global ocean freight supply chain in which global schedule reliability “remained at a level around 34% in September at the same level as seen in August, and the delays of the late vessels remained around a full week for the third consecutive month. These delays effectively remove vessel carrying capacity from the market. And for September this meant that 12% of the global fleet was effectively removed – the same as seen in August,” Jensen noted.

Jensen highlighted that vessel congestion outside key ports also continued throughout last month, noting: “The largest pile-up of vessels waiting in queue is still outside the port complex of Los Angeles/Long Beach. By mid-September the number of waiting vessels reached 70. This declined slightly to the mid-50s in early parts of October only to start escalating again and by end-October the number was getting to 79 vessels waiting in line.”

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

#### **Stressed global supply chains becoming a ‘new normal’**

Fear of shortages, both real and rumoured, is driving consumers to over-buy once again, new report highlights, with an average 70 days currently required to book a container, have it shipped overseas and received by ground transport for final delivery. Continued high consumer demand is among the main drivers of congestion along international supply chains, as a “new normal” for logistics settles in for the long term, a report claims.

“Fear of shortages, both real and rumoured, is driving consumers to over-buy once again,” the inaugural issue of the E2open Ocean Shipping Index said, adding that the “strain” to clear US east and west coast ports will be a key initiative to help inbound and outbound port dwell times “slowly decline” in the coming months. The quarterly publication reports the number of days needed from the moment a container is booked to when a consignee takes delivery at the destination port.

As of October 21, an average of 70 days is needed to book a container, have it shipped overseas and received by ground transport for final delivery, of which 43% is attributed to the time “from booking to gate-in at the port, while another 36% of the increase comes from “ocean transit and awaiting entry time”. That compares with 13 days or 23% longer than the previous year. Supply chains used to operate on a precision path, but that has been disrupted by the imbalance of ocean containers, stay-at-home purchasing, shortages of drivers and chassis, and factories lacking “raw materials and components.”

Not least, the report says that the transit time from departure to arrival at the destination port has increased by 36% or five days “sometimes because there is no available berth when the vessel arrives.” Shipments from Asia to North America have experienced the greatest impacts, with the total time from booking to receipt averaging 70 days — a 39% increase over the past year. The reasons for the increase include the “diminished workforce” at ports in China, South Korea and Vietnam. This has increased vessel loading times to seven days from five over the past year — a 29% uptick in time needed.

In the US, ports are “so backed up” that dozens of ships holding “tens of thousands” of containers are anchored offshore, while stacks of containers await collection at marine terminals, blocking “all physical space” in which offloaded containers could be placed. The run from Asia to North America this quarter shows an average of 70 days from initial booking to clearing the gate at the final port, an increase of 39% year over year.

The report says 31% of the increase comes from the time between booking a container to gate-in at the port of departure, while 40% of the extra time comes from ocean transit and “awaiting entry” at the destination port. It adds that the time from booking a container to when the shipment is received at the port of loading averaged 17 days this quarter “up from 11 days” year on year, a 55% increase.

Dwell times at the loading port have been around seven days since January, about two days more than before the pandemic. But dwell times at destination ports in North America have increased to 10 days. The reverse run from North America this quarter averaged 87 days from initial booking to clearing the gate at the destination port, an increase of 12% year on year. Some 45% of the increase comes from booking to gate-in at the loading port, while dwell time at the port of loading has increased 27% year on year this quarter. Around 47% of the increase to 85 days comes from ocean transit and “awaiting entry” time at the destination port.

The report also reports that transit time from Asia to Europe has averaged 75 days, an increase of 31%, while the run from Europe to Asia has averaged 85 days, an rise of 15%. The transit from North America to Europe has averaged 61 days this quarter, a rise of 28% year on year, while Europe to North America takes 68 days for an increase of 43%.

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

### **US retailers boost Nov-Jan import projections**

US retailers are increasing their import projections for November through January because they expect merchandise that has been sitting on vessels stranded offshore major gateways will come flooding into the country in time for the holidays. Speeding the discharge of import containers from vessels and through congested marine terminals is becoming increasingly urgent as retailers rebuild their depleted inventories, let alone stock store shelves for holiday sales. The US Census Bureau reported that the retail inventory-to-sales ratio edged up only slightly in August to 1.10 from a record-low 1.07 in July. In pre-COVID August 2019, the inventory-to-sales ratio was 1.45.

The National Retail Federation (NRF) projects that holiday sales this year will grow between 8.5 percent and 10.5 percent from last year. “Dockworkers are unloading ships as fast as they can, but the challenge is to

move the containers out of the ports to make room for the next ship,” Jonathan Gold, NRF’s vice president for supply chain and customs policy, said Monday in the November Global Port Tracker that is published monthly by the NRF and Hackett Associates.

Terminal congestion and vessel bunching at major import gateways such as Los Angeles-Long Beach, the Northwest Seaport Alliance (NWSA) of Seattle and Tacoma, and Savannah after 15 consecutive months of record or near-record imports from Asia have left hundreds of thousands of laden import containers stranded on vessels idled at anchor. That means import volumes that should have been recorded in recent months have not yet been landed on shore.

But retailers indicate greater focus on supply chain cooperation will result in laden import containers moving more swiftly through port-related supply chains. Global Port Tracker now projects that imports in November will increase 3.3 percent from a year ago, compared with last month’s forecast for a 2.9 percent increase. The December projection now calls for a 3.5 percent increase, up from a decline of 0.2 percent projected in the October port tracker. And imports are now projected to increase 7.6 percent in January, up from last month’s projection of a 5.7 percent jump.

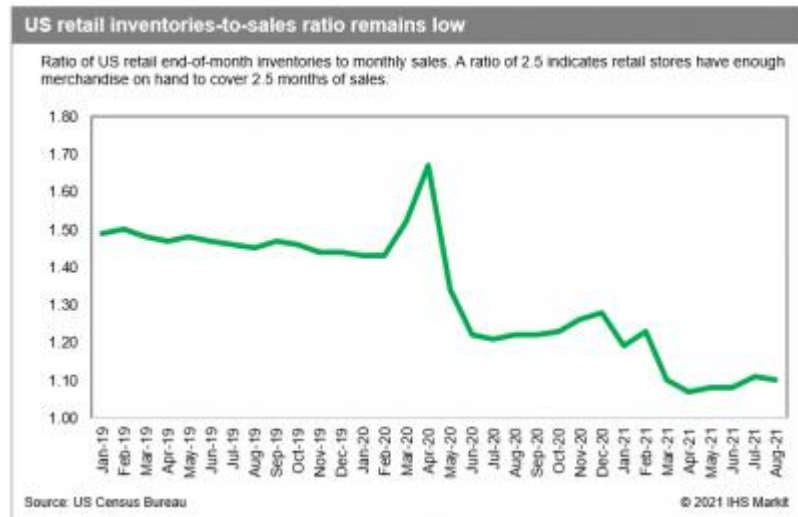
#### End-to-end supply chain bottlenecks

Port congestion in the US, power production shortfalls in China, vessel bunching outside of US ports, warehouses filled beyond capacity, chassis shortages, and congestion at inland rail ramps have been holding down the movement of product from factories in Asia to store shelves throughout the US. “The once-vaunted supply chain continues to come under pressure from all sides,” Ben Hackett, found of Hackett Associates, said in the Global Port Tracker.

Ports and terminal operators are deploying a variety of measures to speed the discharge of import containers from vessels and through congested terminals to retailers’ warehouses. The ports of Los Angeles and Long Beach and two terminal operators in Tacoma have announced fees, ultimately aimed at retailers, for what they call long-dwell containers that sit on marine terminals beyond stipulated storage deadlines.

Global Port Tracker projects that calendar year 2021 will mark the second consecutive year of record US imports. Containerized imports this year are projected to increase 17.9 percent from 2020. Imports last year increased 1.9 percent from 2019 despite the double-digit drop in imports during the first half of 2020 due to COVID-19, according to Global Port Tracker.

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 29 Oct 2021	Current Index 5 Nov 2021
Comprehensive Index			4567.28	4535.92
Service Routes				
Europe (Base port)	USD/TEU	20%	7693	7637
Mediterranean (Base port)	USD/TEU	10%	7315	7269
USWC (Base port)	USD/FEU	20%	6414	6461
USEC (Base port)	USD/FEU	7.50%	10454	10428
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	3584	3459
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	4487	4474
East/West Africa (Lagos)	USD/TEU	2.50%	7801	7751
South Africa (Durban)	USD/TEU	2.50%	6712	6650
South America (Santos)	USD/TEU	5.00%	10199	10135
West Japan (Base port)	USD/TEU	5.00%	324	309
East Japan (Base port)	USD/TEU	5.00%	316	297
Southeast Asia (Singapore)	USD/TEU	7.50%	965	965
Korea (Pusan)	USD/TEU	2.50%	351	344

สรุปรายงานประจำสัปดาห์ พบว่าความต้องการส่งออกจากจีนอยู่ในระดับคงที่ ในขณะที่ค่าระวางปรับตัวลดลง สำหรับเส้นทางยุโรป ความต้องการนำเข้าอุปกรณ์การแพทย์ยังคงที่ ส่วนความต้องการนำเข้าสินค้าประเภทอื่นอยู่ในระดับสูง โดยที่ Demand และ Supply คงที่ ส่วนเส้นทางสหรัฐอเมริกา พบว่าปริมาณการขนส่งยังคงมีความต้องการในระดับสูง ในขณะที่ประสิทธิภาพการจัดการในระบบซัพพลายเชนอยู่ในระดับต่ำ โดยการหมุนเวียนตู้ยังขาดประสิทธิภาพ ซึ่งยังคงพบปัญหาความหนาแน่นในท่าเรือ โดยเรือต้องรอคอยเพื่อเข้าจอดเทียบท่า ทำให้ยังคงพบปัญหาเรื่องระวางเรือที่ค่อนข้างแน่น ในขณะที่เส้นทางออสเตรเลีย ความต้องการนำเข้าสินค้าจำเป็น และอุปกรณ์ทางการแพทย์ยังคงอยู่ในระดับสูง เนื่องจากสถานการณ์การระบาดยังคงเพิ่มขึ้นต่อเนื่อง ส่วนเส้นทางญี่ปุ่นพบว่า โดยทั่วไปปริมาณการขนส่ง และอัตราค่าระวางอยู่ในระดับคงที่ และสุดท้ายเส้นทางอเมริกาใต้ มีปริมาณความต้องการนำเข้าสินค้าจำเป็น และอุปกรณ์ทางการแพทย์จำนวนมาก ซึ่ง Demand และ Supply ยังคงอยู่ในระดับคงที่