

# การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 2 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

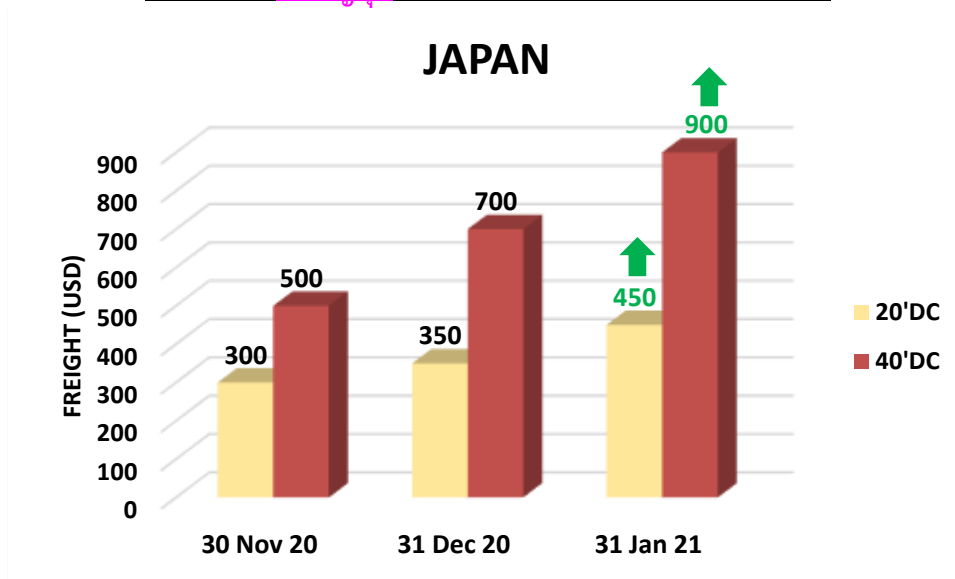
ในขณะที่ เส้นทาง Europe ค่าระวางช่วงครึ่งเดือนหลังของเดือนมกราคม ค่าระวางคงที่อยู่ที่ 3,650 USD/TEU และ 7,300 USD/FEU โดยมีการเรียกเก็บค่า Peak Season Surcharge ในอัตรา 500 USD/TEU และ 1,000 USD/FEU

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)

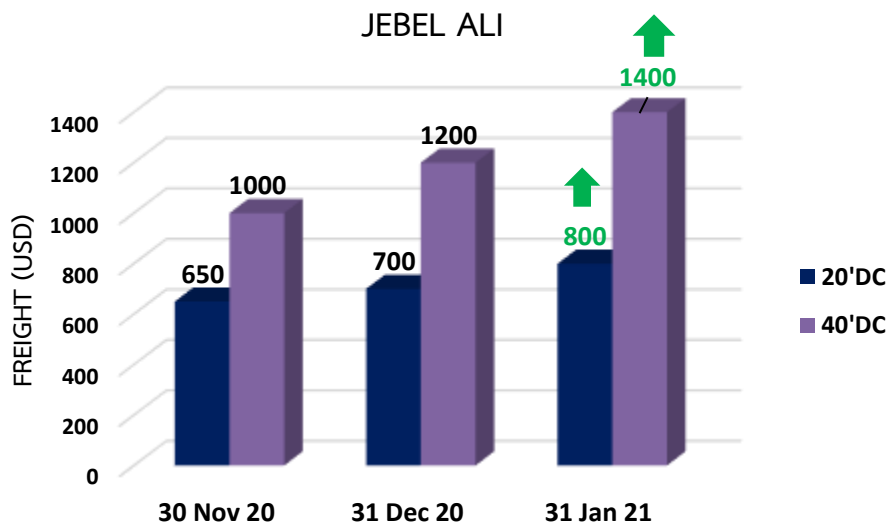
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	1,200	1,300	USD 30/TEU, USD 55/FEU	Effective till 31-Jan-2021
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	1,200	1,800	-	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	4,500	7,000	OBS: USD 52/TEU,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

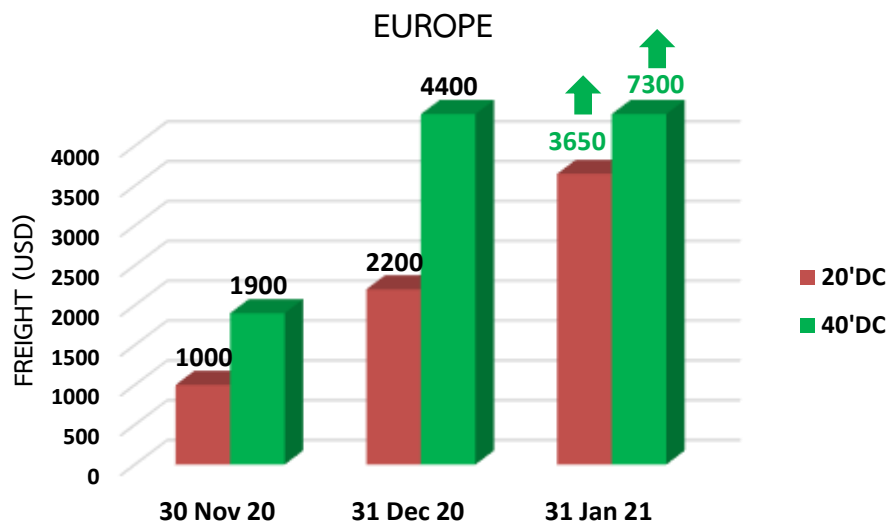
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง ไทย-Jebel Ali เดือน พ.ย. ปี 2563 ถึง ม.ค. ปี 2564



Subject to

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

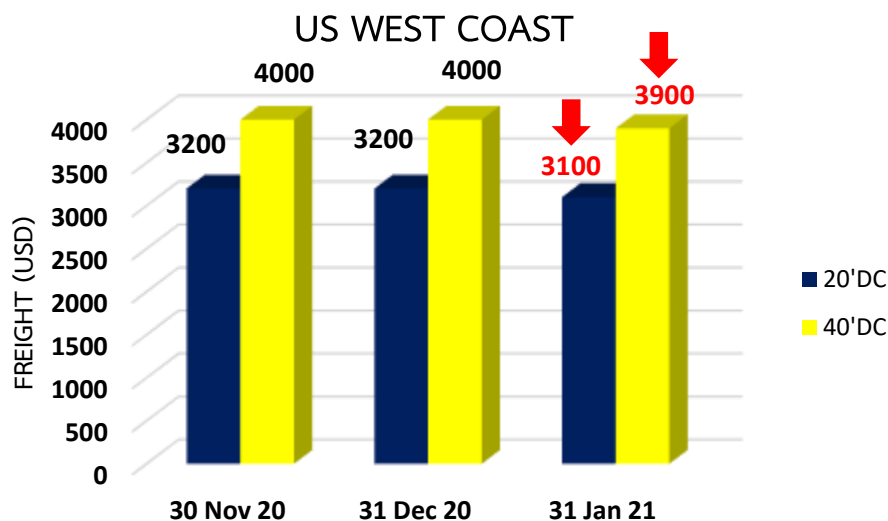
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง ไทย-ยุโรป เดือน พ.ย. ปี 2563 ถึง ม.ค. ปี 2564



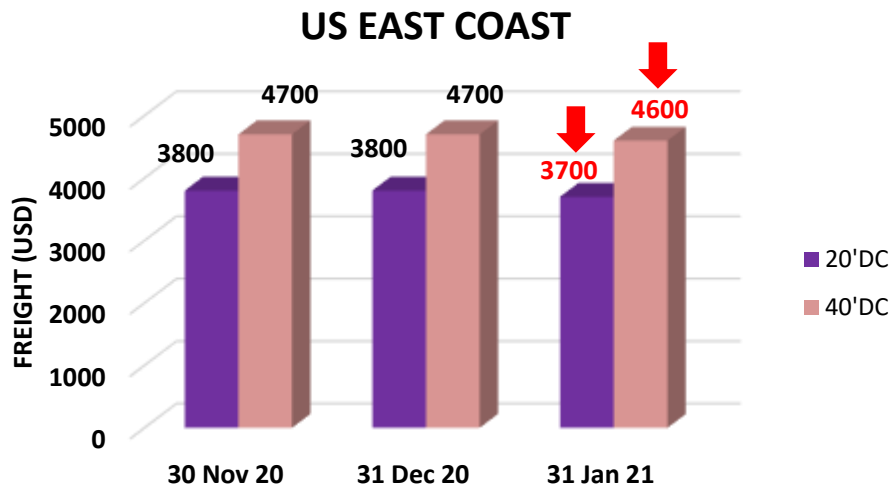
Subject to

- 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 Hapag Lloyd, Maersk และ Cosco

- ประกาศแจ้งเรื่องการรับจองระวางชั่วคราวสำหรับสินค้าประเภท Reefer Shipment ที่เข้าไปยังท่าเรือ Dalian ประเทศจีน เนื่องจากการตรวจคัดกรองโควิด-19 ทำให้เกิดความล่าช้าด้าน Operation สายเรือแนะนำให้เปลี่ยนท่าเรือปลายทางเป็นท่าเรืออื่นทดแทน

สายเรือ Maersk

- ประกาศแจ้งข้อมูลจากเมือง Cebu ประเทศฟิลิปปินส์ ที่มีข้อกำหนดห้ามรถบรรทุกวิ่งในเมืองช่วงเวลาระหว่าง 5.00 น. – 21.00 น. ซึ่งจะทำให้สินค้าไม่สามารถส่งเข้า และออกจากท่าเรือได้ในช่วงเวลาดังกล่าว โดยมีผลตั้งแต่วันที่ 15 มกราคม 2564 ซึ่งอาจส่งผลกระทบต่อ การขนส่งสินค้า โปรดตรวจสอบกับคู่ค้า เพื่อวางแผนการขนส่ง

**Asia-North Europe spot rates increased 327% in Q4**

Price escalation on other major trades means the transpacific has flipped from the most lucrative to the least lucrative for carriers in just four months. Spot freight rate increases on the Asia-Europe trade in the fourth quarter (Q4) outstripped hikes on all other major lanes, with the price escalation on this and other major trades meaning that the transpacific has flipped from being the most lucrative to the least lucrative for carriers in just four months, according to analysis from Alphaliner.

The analyst's review of carrier revenue from spot business per nautical mile on a range of trades in the fourth quarter found that the biggest increases were on the Asia-Europe trade where spot rates from Shanghai to North Europe and the West Mediterranean rose 327% and 297%, respectively (see chart). "The spot rate between Shanghai and North Europe stood at \$8,904 for a 40' container last week," noted Alphaliner. "This rate is calculated as an average of the rate levels collected by the Shanghai Shipping Exchange in a weekly poll of carriers and large forwarders. The average rate does not include any premium for guaranteed booking.

"In reality some cargo owners are already paying over \$10,000 to get their cargo moving from China to Europe." As reported today, multiple sources are reporting rates of US\$10,500 per feu to secure capacity from China to European main ports, with China-UK rates now topping \$16,000 per feu in what has become an

auction for space. Huge Q4 rate increases were also seen from Shanghai to Melbourne (+96%), Lagos (+111%), Jebel Ali (+119%), Durban (+172%) and Santos (+288%).

A September comparison of revenue from spot business per nautical mile by Alphaliner identified the transpacific as the most lucrative of the major trades for carriers with a return of 32.3 cents per nm/TEU. Four months later the transpacific trade was generating the lowest income per nautical mile as rate increases between 6 September 2020 and 8 January 2021 amounted to only 6.9% on the Shanghai-Los Angeles lane and just 4.7% on the Shanghai-New York trade, reported the analyst.

Alphaliner noted that even though last week's Shanghai Containerized Freight Index (SCFI) reading of 2,870 points was an all-time high, "spot rates are expected to continue their rise in the coming weeks as carriers continue to struggle with a shortage of ships and 40' containers to meet the huge cargo demand". The analyst also said that factory closures in Asia from 12 February for Chinese New Year holidays would not, as in previous years, see mass blank sailing schedules from lines. Instead, carriers would seek to clear backlogs.

"They also need to keep their ships moving to the US, Europe and other destinations where empty 40' containers, which are badly needed in Asia, are piling up," it added.

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

### Shippers warned to prepare for bunker surcharge increase

A 35% rise in the price of low-sulphur fuel is set to be passed on to container lines' customers. Shippers were spared the worst impacts of the introduction of new low-sulphur fuel regulations last year due to a collapse in the price of oil following the outbreak of the coronavirus pandemic. But as economic recovery continues and demand for oil returns alongside cuts by major oil producing countries such as Saudi Arabia, bunker prices are on the rise again.

After a dramatic fall in March and April that brought down the price of both heavy fuel oil and very low sulphur fuel oil, and all but obliterated the spread between the two fuels, bunker prices increased and stabilised at a level of around \$290 per tonne for IFO380 and around \$340 per tonne for VLSFO. "This level was quite stable for the period June to early November. However, since then, the fuel price has begun to increase significantly," Sea-Intelligence said.

VLSFO increased 35% from November 1 to January 8. Due to the varying way carriers implement bunker adjustment factors, either quarterly or monthly, there will be a delay before the impact of higher prices are felt by shippers. "When the adjustment is made monthly, it is usually based on the monthly average fuel price, with a two-month time lag," the analyst said. "Some carriers make quarterly adjustments, which in practice often means that, for example, second-quarter bunker adjustment factors that are applicable in April-June would be based on the average fuel price in December-February."

The result was that although oil prices have begun to rise again already, bunker adjustment factors in place are based on earlier lower prices. The prices on which baf's are calculated for the second quarter, however, have increased significantly. As well as an increased overall fuel cost, carriers also face a larger spread between high- and low-sulphur fuel again, swinging the balance back in favour of those who have invested in scrubbers.

"Following the initial spike driven by implementation bottlenecks for IMO2020, the premium [for VLSFO] fairly quickly stabilised around \$50 per tonne for a period of nine months," Sea-Intelligence said. "However, from mid-November we now see a significant continued increase, and the low-sulphur premium is now at \$86 per tonne." This means that carriers will see an improvement in the relative value of the scrubber installations, allowing them to use cheaper high-sulphur fuel. "But it also means that we might begin to see a

rekindling of the discussion as to whether bunker adjustment factor formulas should take the scrubber-enabled vessels into account, especially on the Asia-Europe trade, where many vessels have had scrubbers installed.”

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

### **More US importers signing trans-Pac contracts earlier**

More US importers are signing trans-Pacific contracts earlier than usual to guarantee space both in the short term and over the next 12 to 16 months, carriers, forwarders, and analysts tell JOC.com. Signing some “early bird” contracts in January, rather than in April or May when most annual contracts are finalized, is not a new phenomenon in the eastbound trans-Pacific. But this year is different because the early signings are more frequent and driven more by space guarantees than freight rate considerations.

According to industry sources, more shippers than ever are willing to pay freight rates that are at least twice the rates in last year’s contracts in order to secure additional space guarantees on vessels at Asian load ports. JOC.com spoke with two industry analysts, three carriers, and four non-vessel-operating common carriers (NVOs). “Part of this is an attempt to get more space coverage for January and February,” a carrier executive who did not want to be identified told JOC.com.

Retailers and other importers secure vessel slots in their contracts by signing minimum quantity commitments (MQCs). This year, they are turning to three options to increase their MQCs: extending existing contracts, signing short-term contracts from Jan. 1 through April 30 when their existing contracts expire, or signing 16-month contracts from Jan. 1 through April 30, 2022. Regardless of the option, the new agreements are reportedly in the range of \$2,700 to \$3,000 per FEU to the West Coast, according to carriers, NVOs, and industry analysts.

By comparison, in the 2020-21 trans-Pac contracts that were signed last spring and expire April 30, the rates were about \$1,300 to \$1,400 per FEU to the West Coast and about \$2,100 to \$2,300 per FEU on all-water services to the East Coast. Forwarders told JOC.com many importers in the coming contract year are willing to pay approximately twice what they have paid this past year because vessel space in Asia is so tight they fear contract and spot rates could go even higher in the coming months. Still, a shipping industry analyst warned that carriers and beneficial cargo owners (BCOs) should not look at the reported rates as establishing the benchmark for 2021-22 contracts this early in the tender cycle. “It’s too early to call. I would consider this the opening gambit until we get on the other side of [Chinese New Year],” Bjorn Vang Jensen, vice president of Sea-Intelligence Maritime Analysis, told JOC.com.

Industry sources who spoke to JOC.com last week said that in today’s uncertain environment in the eastbound trans-Pacific, service contract negotiations going forward will attempt to bridge the gap between current market conditions and what the global trade environment might look like in the second half of 2021 as economies reset from the COVID-19 pandemic. According to Xeneta, an ocean and air freight rate benchmarking platform that tracks contracts in real time, most of the Asia-US West Coast contracts being signed in January include rates ranging from \$2,700 per FEU to \$3,100 per FEU. These include short-term contracts lasting several months, contracts of 16-month duration, and extensions of existing contracts, Erik Devetak, chief product officer at Xeneta, told JOC.com, adding there is not much differentiation based on the size of the customers. “You don’t get a discount for being big,” Devetak said.

### COVID-19 impact on volume expectations

Many retailers and other BCOs last spring significantly underestimated the volumes they would be importing from Asia in the subsequent 12 months because last year’s contract negotiations took place during the first wave of the COVID-19 pandemic. US imports from Asia were plummeting at the time, and spot rates



in the eastbound trans-Pacific were declining. The MQCs in the 2019-20 contracts proved to be not nearly enough to cover what was actually shipped after US imports from Asia exploded in late June, and continued to grow throughout the second half of 2020.

In a hypothetical example of an MQC, a retailer or other BCO commits to shipping 5,200 TEU in the coming year. That number is divided by 52, so the customer committed to importing 100 containers each week of the year. When imports unexpectedly increased rapidly in the second half of 2020, carriers generally honored the shipper's 100-per-week MQC. But for any shipments above that, the carriers charged the spot rate at the time, plus additional premiums in some cases.

Spot rates to the West Coast have ranged from \$3,400 to \$4,000 per FEU since August, according to the Shanghai Containerized Freight Index, which is published in the JOC Shipping & Logistics Pricing Hub. Additionally, importers paid surcharges as much as \$2,000 per FEU just to secure containers and at equipment-strapped Asian load ports. As a result, importers are now paying all-inclusive rates as high as \$6,000 per FEU to the West Coast and \$8,000 to the East Coast, NVOs told JOC.com.

Therefore, in order to avoid paying such huge surcharges if the import surge continues in the coming year, some retailers and BCOs are willingly signing short-term and 16-month contracts that increase their MQC, at rates of about \$3,000 per FEU to the West Coast, and about \$3,800 to \$4,000 to the East Coast, even though those are much higher than the rates in their 2020-21 contracts.

#### Most 2021-22 contract rates not yet finalized

Vang Jensen and multiple other sources said US imports from Asia consisting of e-commerce fulfillment, personal protective equipment (PPE), and spring merchandise are certain to remain exceptionally strong at least until most factories close down for a week or two on Feb. 12 for the Lunar New Year holidays. However, projections beyond that get hazy.

Vang Jensen emphasized that after a chaotic seven months going back to June, a top priority of retailers and BCOs in this year's service contract negotiations is to be considered a "shipper of choice," which means they are forecasting to carriers as accurately as possible what their import volumes will be. Although carriers appear to be maximizing their revenue in the current tight market conditions, they also want to be considered "carriers of choice" among their core customers. So while 2021-22 contract rates will definitely be higher than last year, they'll be lower than today's spot rates, Vang Jensen said.

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

ตารางสรุปอัตราค่าระวางจากเอเชียไปเส้นทางต่างๆ อ้างอิงจาก Shanghai Containerized Freight Index (SCFI)

Source: <http://en.sse.net.cn/indices/scfinew.jsp>

Shanghai Containerized Freight Index (SCFI)				
Description	Unit	Weighting	Previous Index 8 January 2021	Current Index 15 January 2021
Comprehensive Index			2870.34	2885
Service Routes				
Europe (Base port)	USD/TEU	20%	4452	4413
Mediterranean (Base port)	USD/TEU	10%	4298	4296
USWC (Base port)	USD/FEU	20%	4019	4054
USEC (Base port)	USD/FEU	7.50%	4750	4800
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	1995	1982
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	2451	2406
East/West Africa (Lagos)	USD/TEU	2.50%	6196	6630
South Africa (Durban)	USD/TEU	2.50%	3307	3298
South America (Santos)	USD/TEU	5.00%	8631	8907
West Japan (Base port)	USD/TEU	5.00%	244	244
East Japan (Base port)	USD/TEU	5.00%	251	251
Southeast Asia (Singapore)	USD/TEU	7.50%	943	958
Korea (Pusan)	USD/TEU	2.50%	196	203

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