

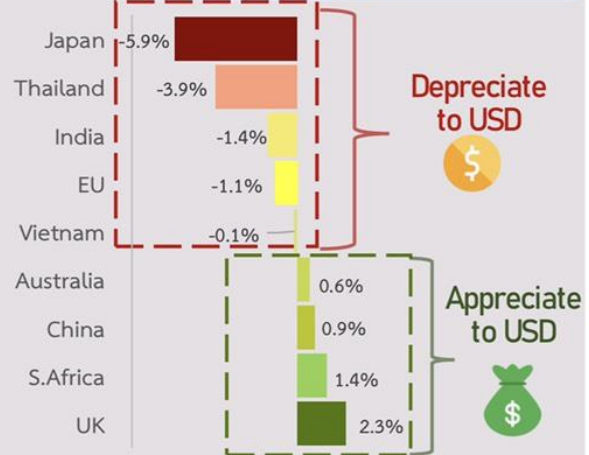
# Weekly Briefing ( 03 May 2021 )



## 01 THB rate / currencies

			
USD	EUR	GBP	AUD
31.18	37.4	43.0	24.0
			
CNY	JPY	INR	VND
4.81	0.28	0.42	0.0013

## 02 Exchange rate trend to USD (YTD)



## 03 CrudeOil price & Gold (26-30 Apr)

	Oil	OPEC	Brent	WTI
	USD/Barrel	61-66	62-69	59-65



	Gold	1,768 USD/Ounces
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## 04 Freight Index

(SCFI Comprehensive Index)



## Freight Index

(SCFI Comprehensive Index)

23 April 2021	30 April 2021
2,979.76	3,100.74
	+120.98

## 05

## Weekly Top's Stories



1. การตรวจสอบความถูกต้องของข้อมูลและตรวจสอบสถานะการส่งผ่านข้อมูลเอกสาร e-Form D ผ่านทาง "NSW e-Tracking Application"



2. กรมศุลกากรขอเชิญชวนผู้ประกอบการใช้ระบบรับชำระเงินอิเล็กทรอนิกส์ (Bill Payment) ในการชำระค่าภาษีอากร ค่าธรรมเนียมรายได้อื่นๆ รายละเอียดข่าว/บทความ รายละเอียดข่าว 1-2 : ตาม QR Code <http://bit.ly/wk1721>



3. ญี่ปุ่นไฟเขียวร่วม RCEP ข้อตกลงการค้าเสรีที่ใหญ่ที่สุดในโลก รายละเอียดข่าว : <https://www.posttoday.com/world/651591>



# การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 17 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 26/TEU, USD 51/FEU	Effective till 31-May-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 17/TEU, USD 34/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 56/TEU, USD 112/FEU	
	Subject to War Risk Surcharge: USD 35/TEU, USD 70/FEU			
Thailand - South Korea (Busan)	250	500	LSS: USD 45/TEU, USD 90/FEU	
Thailand - South Korea (Incheon)	300	600		
Thailand – Nhava Sheva	2,000	3,000	ISOCC: USD 45/TEU, USD 90/FEU	
Thailand - Melbourne	1,450-1,550	2,900-3,050	FAF: USD 69/TEU, USD 138/FEU	Effective till
Thailand - Sydney				30-Apr-2021
Thailand – Durban / Cape Town	2,900	5,000	Subject to ISOCC USD 94/TEU, USD 188/FEU	Effective till
	Subject to SCMC USD 30/BL			31-May-2021
Thailand – Europe (Main Port)	4450	8800	ISOCC: USD 88/TEU, USD 176/FEU	Effective till 14-May-2021
	Subject to ENS USD 30/BL			
Thailand - US West Coast	3,200	4,000	-	Effective till 30-Apr-2021
Thailand - US East Coast	3,700	4,700		
	Subject to Panama Low Water USD 30-60/Container			

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

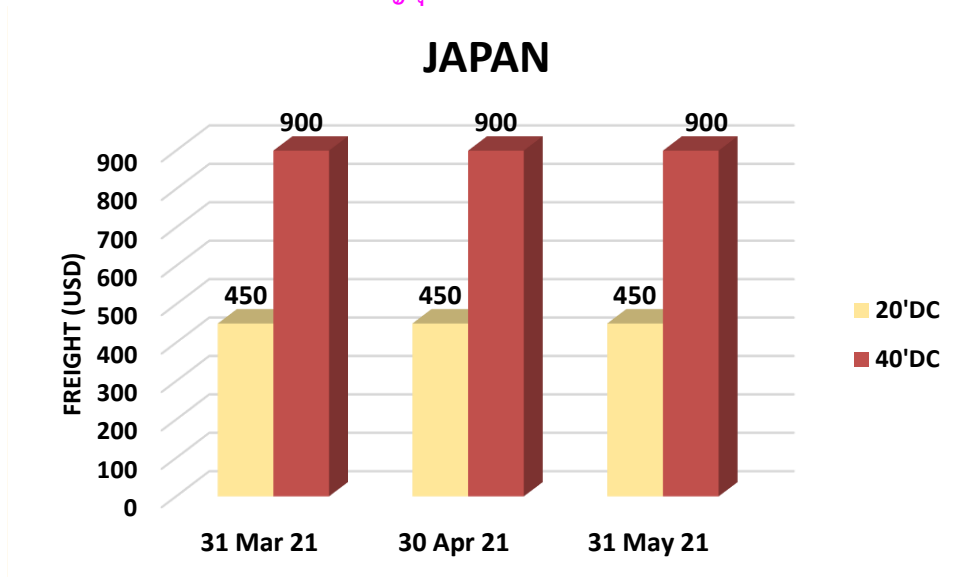
สถานการณ์ค่าระวางในช่วงเดือนพฤษภาคม 2564 ค่าระวางในเส้นทางเอเชียส่วนใหญ่มีอัตราคงที่ โดยเส้นทาง Shanghai อัตราค่าระวางอยู่ที่ 350 USD/TEU และ 800 USD/FEU เส้นทาง Hong Kong ค่าระวางอยู่ที่ 250 USD/TEU และ 700 USD/FEU เส้นทาง Klang ค่าระวางอยู่ที่ 450 USD/TEU และ 1,000 USD/FEU และเส้นทาง Japan ค่าระวางอยู่ที่ 450 USD/TEU และ 900 USD/FEU โดยเส้นทางที่มีการปรับเพิ่มขึ้นของค่า Low Sulphur Surcharge ได้แก่ เส้นทางเกาหลี ที่เรียกเก็บในอัตรา 45 USD/TEU สำหรับเส้นทางแอฟริกาใต้ ค่าระวางคงที่อยู่ที่ 2,900 USD/TEU 5,000 USD/FEU

ในขณะที่ เส้นทาง Europe ค่าระวางช่วงครึ่งเดือนแรกของเดือนพฤษภาคม ค่าระวางปรับเพิ่มขึ้น 500 USD/TEU ทำให้ค่าระวางอยู่ที่ 4,450 USD/TEU และ 8,800 USD/FEU และมีการปรับเพิ่มการเรียกเก็บค่า ISOCC โดยเรียกเก็บในอัตรา 88 USD/TEU และ 176 USD/FEU โดยสายเรือสามารถรับจองระวางได้ช่วงครึ่งเดือนหลังของพฤษภาคม เนื่องจากการขาดแคลนระวางเรือ **\*\*Remark: สำหรับค่าระวางเดือนพฤษภาคมเส้นทางออสเตรเลีย และเส้นทางสหรัฐอเมริกาจะแจ้งให้ทราบภายหลัง\*\***

**CONTAINER FREIGHT RATE (REEFER)**

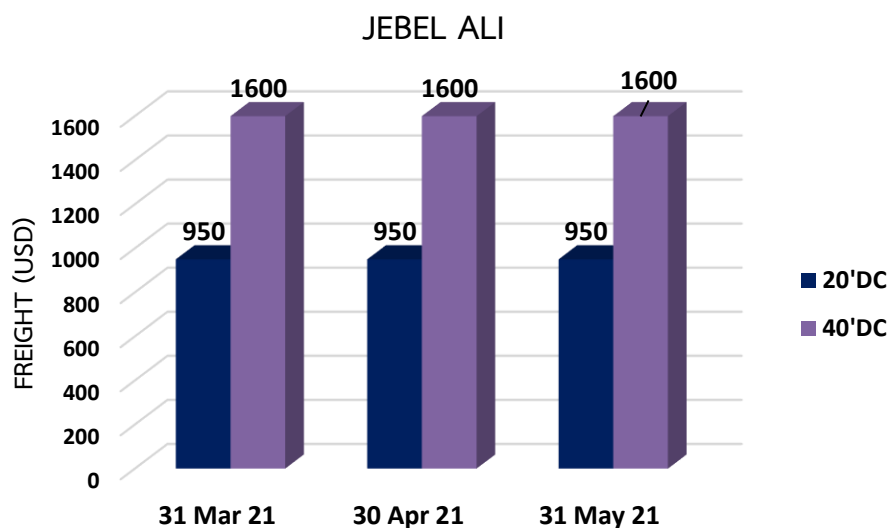
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	1,200	1,300 (Durian: 2,000-2,500 Effective: 1-7 May 21)	USD 55/TEU, USD 105/FEU	Effective till 31-May-2021
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	1,300-1,400	1,500-1,700	USD 3/TEU, USD 6/FEU	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	5,500	7,500-8,000	OBS: USD 195/TEU, USD 390/FEU + PSS: USD 500/TEU, USD 1,000/FEU	Effective till 14-May-2021

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



Subject to Low Sulphur Surcharge (Mar.- May 21): USD 26/TEU และ USD 51/FEU

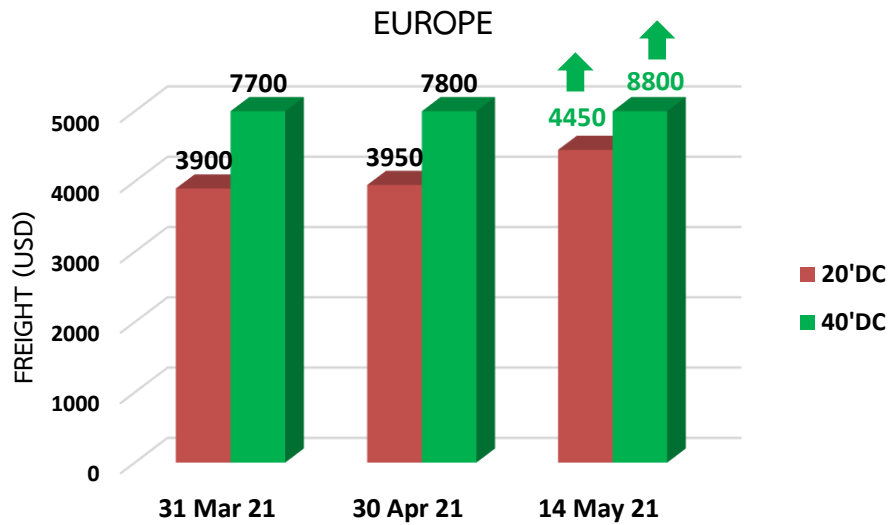
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง **ไทย-Jebel Ali** เดือน มี.ค. ถึง พ.ค. ปี 2564



Subject to

- War Risk Surcharge: USD35/TEU และ USD70/FEU
- Low Sulphur Surcharge (Mar. 21): USD45/TEU และ USD90/FEU  
(Apr.-May 21): USD56/TEU และ USD112/FEU

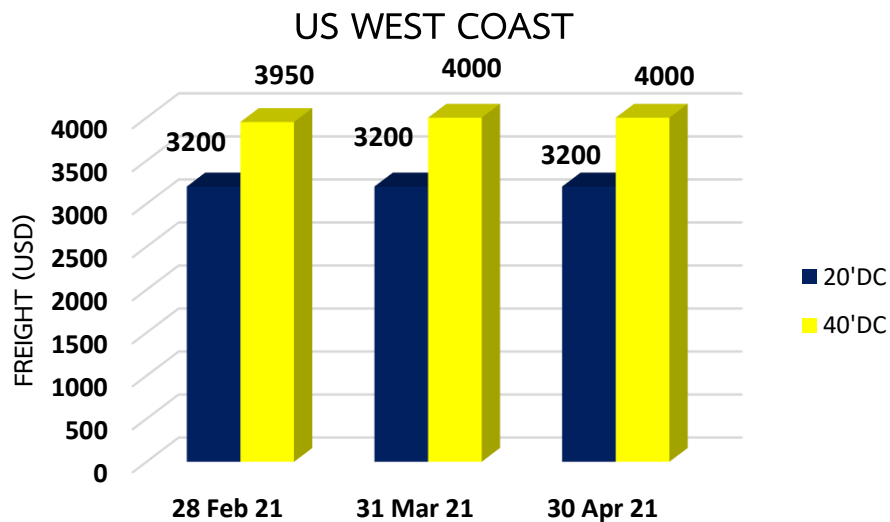
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต  
ในเส้นทาง ไทย-ยุโรป เดือน มี.ค. ถึง พ.ค. ปี 2564



Subject to

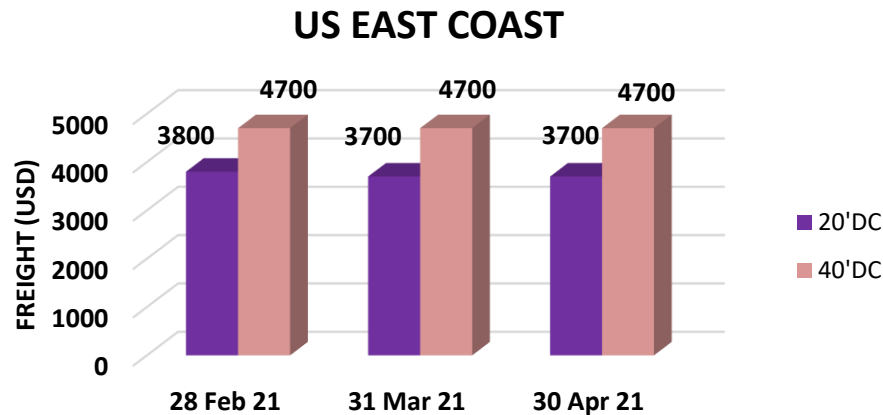
- ISOCC (Mar.-Apr.21): USD71/TEU, USD142/FEU  
(May 21): USD88/TEU, USD176/FEU
- ENS: USD30/BL

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





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



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

➤ รวบรวมประกาศสำคัญจากสายเรือ

สายเรือ CMA CGM

- ประกาศแจ้งเรื่องการใช้ระบบอิเล็กทรอนิกส์ สำหรับการยื่นขอ Letter of Indemnity (eLOI) เพื่อช่วยอำนวยความสะดวก และประหยัดเวลามากขึ้น โดยตั้งแต่วันที่ 1 มิถุนายน 2564 เป็นต้นไป การขอข้อมูล LOI ดังต่อไปนี้ จะปรากฏบน e-Business Platforms ของ (My CMA CGM, My CNC, My ANL, My APL) โดยสามารถลงทะเบียน e-Business account ได้ทาง Website ของสายเรือ
  - Non-endorsed bill
  - Delay in Transit
  - Express (Telex) Release
  - Part load One Shipper/Several Consignees
  - Part load Several Shippers/One Consignee
  - Print BL at Destination
  - Amendment of Bill of Lading

สายเรือ Cosco

- ประกาศแจ้งปรับการเรียกเก็บค่า General Rate Restoration (GRR) จากเส้นทาง Far East โดยมีรายละเอียดดังนี้

From	To	Effective Day	Quantum
Far East	West Africa	May 16,2021	USD500/20gp 1000/40gp 1000/40hc
Far East	East Africa	May 15,2021	USD300/20gp 600/40gp 600/40hc
Far East	South Africa	May 1,2021	USD300/20gp 600/40gp 600/40hc
		May 12,2021	USD500/20gp 1000/40gp 1000/40hc
		May 22,2021	USD500/20gp 1000/40gp 1000/40hc
Far East	East Coast of South America	May 15,2021	USD800/20gp 800/40gp 800/40hc
Far East	West Coast of South America	May 15,2021	USD300/20gp 300/40gp 300/40hc
Far East	Panama& Caribbean	May 15,2021	USD300/20gp 300/40gp 300/40hc

### สายเรือ CNC

- ประกาศแจ้งปรับการเรียกเก็บค่า Low Sulphur Surcharge (LSS) สำหรับสินค้าในเส้นทาง Intra-Asia โดยมีผลตั้งแต่วันที่ 1 มิถุนายน 2564 รายละเอียดปรากฏดังตาราง

#### LSS Short Distance

Container Type	Currency	20'	40'	40'HC
Dry	USD	30	60	60
Flat Rack/ Open Top/ Tank/ Other Special Equipment	USD	30	60	60
Refrigerated	USD	45	90	90

#### LSS Long Distance

Container Type	Currency	20'	40'	40'HC
Dry	USD	52	104	104
Flat Rack/ Open Top/ Tank/ Other Special Equipment	USD	52	104	104
Refrigerated	USD	78	156	156

### สายเรือ APL

- ประกาศแจ้งปรับการเรียกเก็บค่า Peak Season Surcharge (PSS) สำหรับสินค้าจากเส้นทางเอเชีย ไปยังสหรัฐอเมริกา มีผลตั้งแต่วันที่ 1 มิถุนายน 2564 ดังนี้
  - USD 540 per 20' (all types)
  - USD 600 per 40', 40'HC (all types)
  - USD 675 per 40' (reefer types)
  - USD 765 per 45' (all types)
  - USD 960 per 53\* (all types)

#### Post-Suez effects continue to ripple through global supply chains

A month after maritime traffic in the Suez Canal was suspended unexpectedly for almost a week, growing congestion at ports, a shortage of containers, and high spot rates in both air and ocean freight markets have all added to the challenges facing cargo owners. A month after maritime traffic in the Suez Canal was suspended unexpectedly for almost a week, its effects continue to ripple through global supply chains in multiple forms, including rising congestion levels and delays at ports in Europe and Southeast Asia such as Rotterdam and Singapore, supply chain risk management specialist Everstream Analytics highlighted in an update this week.

Although the impact on European container ports appear to be less severe than originally feared, growing congestion levels at ports, a shortage of containers, and high spot rates in both air and ocean freight markets have all materialised in the aftermath of the Suez Canal closure, due to the large number of simultaneously arriving vessels following the blockage.

Empty containers have also been held for longer than usual at European ports, exacerbating the scarcity of containers at Asian export gateways and prompting ocean carriers to cut short port stays in Europe to reposition equipment faster back to Asia. Due to the reduced cargo capacity on the Asia-Europe shipping lane in the aftermath of the Suez Canal obstruction, spot rates have not only been rising in the ocean freight



market, but also in the air cargo market as shippers opt to convert critical shipments from ocean to air by any means possible, the report highlighted.

#### Ports at high risk of congestion

“Since last week, the first vessels stuck in the Suez Canal have been calling at European and Southeast-Asian container ports, which have been quieter than usual in the first half of April due to the canal blockage,” its report noted. “In Europe, the Port of Rotterdam was expected to have the greatest number of vessel calls from ships arriving from the Suez Canal.

“Although contingency measures, such as emptying yards to make space for new containers, have helped terminal operators initially to keep operations running, berth line-ups of vessels have quickly started to become congested, with operational delays now averaging 5-7 days, according to carriers.” Alongside current waiting times at Rotterdam of 5-7 days, Singapore is seeing waiting times averaging around 2.5 days, Everstream noted.

#### Congested until mid-May

It said berthing line-ups “are expected to remain congested until mid-May as more vessels continue to call at the port”, adding: “Should congestion issues in Rotterdam worsen, carriers could also opt to unload cargo at nearby ports such as Antwerp, Felixstowe, or Le Havre. This may cause spill-over congestion at these gateways due to ad-hoc vessel arrivals and leave shippers with cargo at the wrong ports until ships arrive a week later to carry the cargo to their destination ports.

Container terminals in Antwerp have already faced congestion issues prior to the Ever Given’s grounding, prompting container lines to push more volumes to terminals in Le Havre in recent months, Everstream highlighted.

In Asia, the Port of Singapore, which is expected to receive the largest number of vessel calls on eastbound services, has also faced an uptick in vessel berthing times over the past 18 days – with vessels now spending 60 hours on average outside the port, compared to 42 hours on 8 April, Everstream reported. Should congestion issues worsen in Singapore, carriers could opt to discharge cargo at alternative hubs nearby, increasing the risk of congestion at Port Klang or Tanjung Pelepas, it added. The latter has already been facing average berthing delays of more than 2 days in the past weeks.

#### Empty container availability

Besides the increased risk of delays for import cargo into Europe and Asia, the availability of container equipment at export hubs in China and Korea is expected to decline from mid-April and well into May, Everstream highlighted, noting that this will apply mostly to 40-foot containers, which account for around 75% of containers on the major east-west trade.

Among the ports most likely to be affected by the shortage are Shanghai, Ningbo, Qingdao, and Busan, with the biggest impact to be expected between April 19 and early May due to delayed vessel arrivals. According to the Container Availability Index (CAx), equipment availability at the Port of Shanghai has been decreasing every week since the beginning of April and will likely fall further for a period of 2-3 weeks until mid-May, pushing back the recovery across Chinese ports and potentially leading to further spot rate increases. These observations are broadly consistent with reports this week from freight forwarders, which note that while the Suez Canal blockage at the end of last month is set to prolong the current operational capacity issues in ocean freight, it has not led to the catastrophic congestion crisis some had feared.

Geodis’ senior vice president for global ocean freight Matthias Hansen told *Lloyd’s Loading List* that equipment availability, tight capacity, and schedule reliability have taken a further turn for the worse “in an already very constrained market where less than 35% of ships arrive on time”. However, he played down

reports that ocean carriers are discharging container imports delayed by the Suez incident wherever they can in North Europe as they scramble to return vessels to Asia as soon as possible with empty boxes.

“The majority of the carriers have unloaded the containers in accordance with the booking,” Hansen said, with only “a very few isolated cases” where the boxes of Geodis’ customers had been discharged in the ‘wrong’ port.”

#### Empties given priority

He accepted that in some cases empties were being given priority by lines over European export freight, noting: “The repositioning of empty boxes to Asia has the highest priority, as East-West freight rates bring in the highest income for the carriers. This leads to the fact that certain urgent (export) cargo flows are interrupted or will not be accepted by carriers, leading to equipment shortages becoming an issue in Europe.” Bolloré Logistics’ director of strategic accounts and ocean freight development, Anne-Sophie Fribourg, said imports have suffered because of the Suez Canal blockage “with the late arrival of the blocked ships and the (ensuing) congestion at ports” while on the export side, “the main difficulties are to find empties for export cargo and find space aboard ships on the majority of trades”. But like Geodis, Bolloré has not seen carriers curtailing schedules on a widespread basis in order to offload imports and precipitate the return of vessels to Asia, at least not “on a global scale,” she explained.

#### Some alternative ports used

“We have seen some cargo being discharged in Antwerp instead of Le Havre, but carriers have offered a solution to bring the containers to Le Havre,” she noted. “The prioritization of empties has become a feature due to the shortage of containers in China for many weeks now.” Fribourg added that carriers are seeking to limit the impact on exports by restricting the number of ‘empties’ in circulation – through limiting the number of days empties can be picked up prior to ETD. “It is more the ‘Schedule Recovery Programmes’ of the carriers, with blank sailings, which have led to call skips and therefore a backlog in export cargo,” Fribourg added.

Hellmann Worldwide Logistics’ global head of sea freight FCL, Michael Amri, said that the blockage of the Suez Canal will have “a lasting effect and will tend to worsen the situation with regards to import and export business in the coming weeks. This is particularly true for the equipment situation in Asia and Europe, which was already very tense before the Suez crisis.” He continued: “Carriers have omitted ports in order to bring their services back on schedule. This leads to further delays on many routes. The entire industry is affected to some extent. Thanks to our tracking tools, we can trace shipments globally across all modes of transport and are hence in a position to buffer the negative effects in the best possible way.

“As a multi modal service provider, we can shift shipments from one transport mode to the other. This has helped us to offer agile solutions and keep supply chains running. On those contingency plans for the boxes affected by the Suez incident, Amri said Hellmann was “in close contact with affected clients and our carrier partners to bring the containers to the final destination as soon as possible by sea or any other possible mode of transport”, stressing that “communication with clients is key to manage the situation”.

Hellmann’s Amri concluded: “The Suez Canal blockage will definitely hamper the Asia-North Europe trade for several more months. Whilst the overall demand still remains high, the disrupted supply chains cause an immense shortage of equipment (boxes) and available capacity on cargo vessels, particularly in Asia and Europe, maintaining spot rates at a very high level.” As to when the ripples of the Ever Given incident are likely to disappear, Fribourg said: “Not before eight weeks”, while Geodis’ Hansen points to a similar timeframe. “With regard to Europe to Asia services, we expect that the situation and schedule disruptions will improve as of end of June,” he noted. “That said, some disruption will certainly impact Q3. The fact that some carriers

announced the supply of ‘new build’ empty equipment becoming available will relax the market on certain trade lanes.”

#### US impact

Meanwhile, another major forwarder, DHL Global Forwarding, said that the congestion caused by the Suez Canal blockage has impacted ports in the US more than those in Europe, while backlogs are building up in Asia due to delayed sailings and equipment scarcity.

“However, we see the ports working hard on getting the increased volumes managed,” DGF’s EVP and global head of ocean freight, Dominique von Orelli, told *Lloyd’s Loading List*. “In addition, some carriers are rerouting vessels and skipping certain port of call in an effort to stabilize schedules, which has naturally resulted in a reduction in capacity and allocations. Exacerbated by the empty container situation, the impact of this marine traffic jam will continue to be felt in the coming two months.”

#### Outlook for the market

Turning to the outlook for the market, Geodis’ Hansen predicted that global demand for containerized goods “will remain robust until the end of the year and the elevated container price index is not likely to be lowered any time soon”. He continued: “Available capacity and vessel utilization are close to being maxed out as idle fleet is at record levels, below 3%. Operational challenges are here to stay through the second quarter and ahead of summer peak season.”

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

#### **Long-term box rates rise to new highs**

Ocean freight contract prices continued to rise in April, with all of the key headhaul markets for the US, Europe and Asia seeing year-on-year and month-on-month rises, new figures from Xeneta reveal. Long-term ocean freight contract prices continued to rise in April, with all of the key headhaul markets for the US, Europe and Asia seeing year-on-year and month-on-month rises, new figures from Xeneta reveal.

Figures published today based on the digital rates specialist’s Xeneta Shipping Index (XSI) indicate that the global XSI long-term market as a whole continued to rise in April, increasing by a further 4.1% to reach 140.29 points. With both short-term and contracted rates maintaining their momentum, the benchmark is now up 21.1% year-on-year and has risen by 23.5% since December 2020.

Xeneta’s long-term contract rates umbrella looks at any contract that is valid for longer than 88 days, although it said that in most cases, these are 12-month contracts. That overall index is a combination of worldwide trade-weighted corridors not limited to US, Europe and Far East indices.

#### Regional main trades

Xeneta said US imports on the long-term market XSI reached yet another all-time high in April after increasing 3.5% month-on-month to 134.08. While exports also rose, jumping by 3.3% to 93.77 points, the exports benchmark remains down 5.7% compared to the same period of last year. European imports on the XSI “continued their meteoric rise”, jumping by an additional 5.4% month-on-month to 164.33. Exports also rose in April, albeit to a lesser extent, increasing by 2.3% to 129.08.

**Fig 2: XSI® - Europe Imports / Exports**

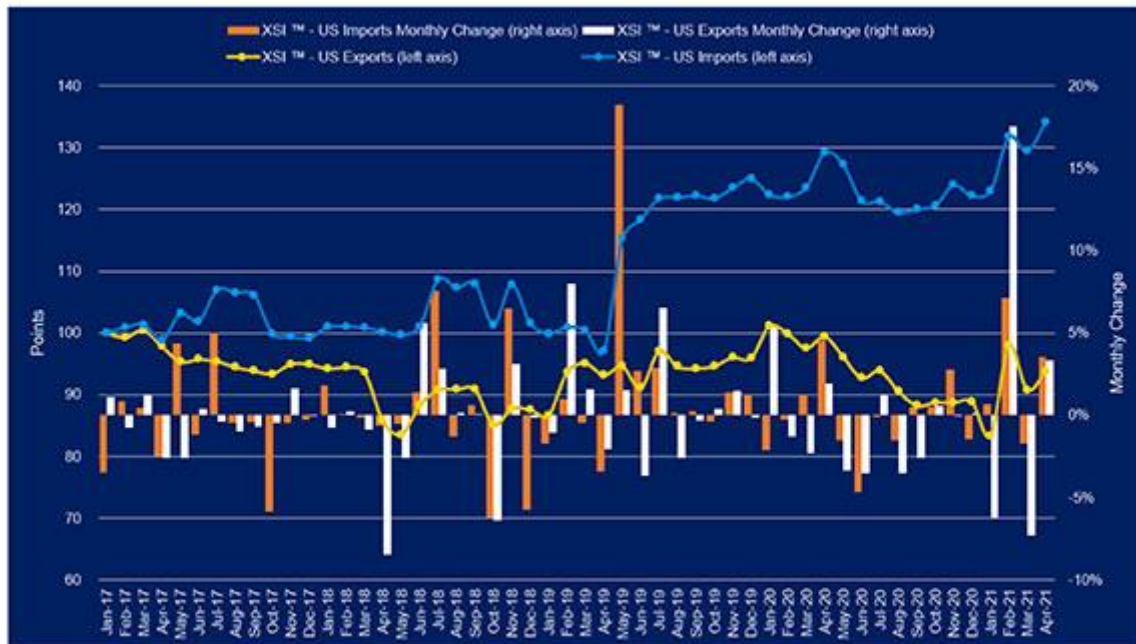

Far East exports continued their steady rise, appreciating a further 5.3% month-on-month to 176.10. Imports on the long-term market XSI increased only marginally in April, rising by just 0.2% to 116.33 points, with the benchmark now 15.7% higher than the same period of 2020. Xeneta noted that after many months of price rises for cargo capacity buyers, there was “anything but relief in April”, reflecting the fact that “all trade corridors on the long-term XSI showed indicators pointing relentlessly upwards”.

CEO Patrik Berglund commented: “It’s been another incredible month, in a unique year, for the container shipping segment. In the US, we continue to see severe delays and bottlenecks, with strong demand – driven in part by changing e-commerce habits – driving rate development. Some shippers are reportedly paying double the contracted rates they enjoyed just one year ago.” In addition, Xeneta also cautions that its short-term market XSI “is now showing increases on trans-Atlantic trade lanes, suggesting further long-term rates pain for shippers may lie ahead”.

#### Delays and bottlenecks

Xeneta noted that the US trades “also continue to be hampered by severe delays and bottlenecks, with some shippers reportedly paying twice as much as a year ago for contract business. Whether demand will be maintained in the long run will depend on consumer buying habits post lockdown. However, it is likely that at least some of the increased demand for e-commerce will be maintained. Combined with low inventories, demand could be higher for longer, reducing the likelihood of a return to rock bottom rates in the medium term.”

Fig 4: XSI ® - US Imports / Exports



On the European import markets, it noted: “The calamity that was the Ever Given has begun to have real-world implications for an already strained market. Estimates suggest the blockage of the Suez Canal could impact North Europe until June, with ports overwhelmed with cargo. “ It noted that in their rush to get ships back to Asia to fulfil new orders, carriers have been dumping some containers where they can, while trying to load as many empties as possible, adding: “As such, shippers are being hit twice, once from initial delays and secondly by the news that their shipments are at the wrong port, with no immediate plans to relay their boxes to their correct destination.”

It continued: “Although these actions should mean schedules will be impacted less compared to if lines had anchored and waited outside their original destination, it will be of little comfort to shippers who have urgent consignments in the wrong location. The situation became so bad that Maersk recently stopped accepting bookings, albeit these have now resumed. “However, schedules are expected to be impacted into May and to remain tight in Q3. All this means that shippers should not expect any immediate relief from the current situation and with carriers holding all the cards, further rate increases are not out of the question.”

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

#### There are enough containers for global trade – they're just in the wrong places

The global container availability crisis is unlikely to ease before the end of the year – despite 2021 likely being a record-breaker in terms of new boxes delivered. According to John Fossey, senior analyst of container equipment at Drewry Shipping Consultants, around 1.4m teu of new containers were delivered in the first quarter, around 10% more than in the final quarter of last year and 21% more than in Q1 20. “Based on current activity, we believe the full-year 2021 production could be more than 4.7m teu. That would be a record year for container production, beating the 4.42m teu produced in 2018 and 52% up on the 3.1m teu delivered last year,” he said.

However, Mr Fossey argued this would be unlikely to put a dent in the acute equipment shortages experienced by many shippers and forwarders around the world. “I’m afraid the shortages are likely to last until the end of the year, and the lack of containers is due to the carriers’ response to Covid – firstly, the initial

blanking of voyages, followed by carriers deploying larger ships and extra loaders to cater for the unexpected demand, which created a vicious cycle of yard congestion in the ports. “In response to that congestion, carriers began to cut and run at ports – which meant not loading empties – and that only made the port congestion worse.”

Mr Fossey explained: “It’s easy for carriers to switch-on capacity, but nowhere near as easy for ports. It takes time for terminal operators to hire and train new staff, while the hinterland transport such as rail and haulage are struggling with absenteeism and reduced labour productivity, which makes clearing imports even harder. “It’s clear the whole year will be affected by port congestion – the container cycle times need to get back to pre-Covid levels, but this won’t be likely until the end of this year and possibly into 2022.” But he added: “That said, Drewry believes there is sufficient equipment in the fleet to support trade and its growth, it is just that the containers are in the wrong places.”

Meanwhile, demand for new equipment continues to soar, and not just to cater for demand – as general rule, containers have a 15-year life and a large tranche of boxes delivered between 2005 and 2009 are coming to the end of their operational lives. “There was a bulge of equipment built in the late 2000s, and replacing those units will drive equipment ordering through to 2025 – around 45% of the orders placed this year are replacement units, but that will rise to over 60% next year and until 2025, with output remaining over 4m teu a year until then,” said Mr Fossey.

New container prices have unsurprisingly been high as a result – the average price of a 40ft high-cube (HC) in the first quarter of this year was \$6,160, some 90% higher than a year ago. The tight production capacity has also led carriers to agree to far longer lease periods with container lessors – Mr Fossey noted that lessors had routinely been agreeing periods of 9-10 years. “In one case, we understand a 15-year lease term was agreed, and we think it will continue to move in this direction, which means increasing numbers of new containers are likely to be under a single lease for their entire lifetime,” he said.

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 23 April 2021	Current Index 30 April 2021
Comprehensive Index			2979.76	3100.74
Service Routes				
Europe (Base port)	USD/TEU	20%	4325	4630
Mediterranean (Base port)	USD/TEU	10%	4446	4705
USWC (Base port)	USD/FEU	20%	4967	5023
USEC (Base port)	USD/FEU	7.50%	5687	6419
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	2160	2299
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	1878	1853
East/West Africa (Lagos)	USD/TEU	2.50%	6412	6506
South Africa (Durban)	USD/TEU	2.50%	3326	3522
South America (Santos)	USD/TEU	5.00%	7304	7313
West Japan (Base port)	USD/TEU	5.00%	253	252
East Japan (Base port)	USD/TEU	5.00%	260	259
Southeast Asia (Singapore)	USD/TEU	7.50%	854	857
Korea (Pusan)	USD/TEU	2.50%	312	312

สรุปรายงานประจำสัปดาห์พบว่า อัตราค่าระวางปรับเพิ่มขึ้นในหลายเส้นทาง สาเหตุเนื่องมาจากปัญหาการขาดแคลนระวางเรือ โดยในเส้นทางยุโรป พบว่าจากปัญหาการกลับมาระบาดของ Covid-19 ในประเทศปลายทางหลายพื้นที่ ส่งผลกระทบต่อ Supply Chain แต่จากสถานการณ์เรือขบวนคลองสุเอซที่คลี่คลายลง ส่งผลให้สถานการณ์เรือระวางที่ค่อนข้างแน่น เริ่มดีขึ้น ในขณะที่เส้นทางสหรัฐอเมริกา พบว่ายังคงมีความต้องการนำเข้าสินค้าในปริมาณสูง โดยปัญหาเรื่องความหนาแน่นในท่าเรือ และการขาดแคลนตู้เปล่ายังคงดำเนินต่อไป ส่วนเส้นทางออสเตรเลีย สถานการณ์ค่อนข้างคงที่ เช่นเดียวกับเส้นทางญี่ปุ่น ที่ปริมาณการขนส่งสินค้าอยู่ในภาวะคงที่