

การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 14 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 30-Apr-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	-	
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	
Thailand - Sydney				
Thailand – Durban / Cape Town	2,900	5,000	Subject to ISOCC USD 94/TEU, USD 188/FEU	
	Subject to SCMC USD 30/BL			
Thailand – Europe (Main Port)	3,900	7,700	ISOCC: USD 71/TEU, USD 142/FEU	
	Subject to ENS USD 30/BL			
Thailand - US West Coast	3,200	4,000	-	Effective till 14-Apr-2021
Thailand - US East Coast	3,720	4,650		
	Subject to Panama Low Water USD 30-60/Container			

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

สถานการณ์ค่าระวางในช่วงเดือนเมษายน 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 เส้นทาง Jebel Ali ที่เรียกเก็บในอัตรา 56 USD/TEU และเส้นทาง Nhava Sheva เรียกเก็บในอัตรา 45 USD/TEU สำหรับเส้นทางแอฟริกาใต้ ค่าระวางคงที่อยู่ที่ 2,900 USD/TEU 5,000 USD/FEU แต่มีการปรับเพิ่มการเรียกเก็บค่า ISOCC โดยเรียกเก็บในอัตรา 94 USD/TEU

สำหรับเส้นทางออสเตรเลีย พบว่าค่าระวางเส้นทาง Melbourne คงที่ โดยเรียกเก็บอยู่ระหว่าง 1,450-1,550 USD/TEU และ 2,900-3,050 USD/FEU ส่วนท่าเรือ Sydney ค่าระวางปรับลดลง โดยเรียกเก็บเท่ากับเส้นทาง Melbourne ใน

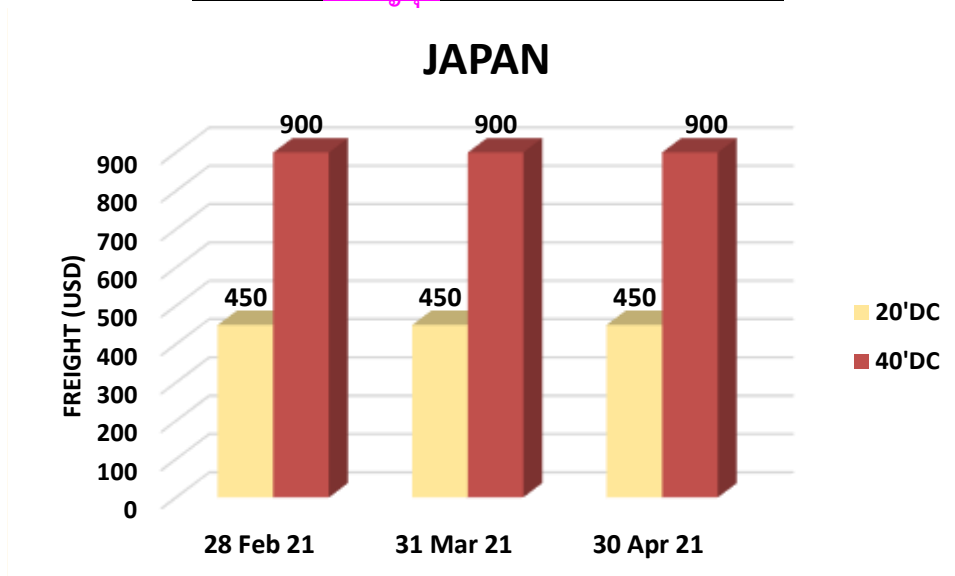
อัตรา 1,450-1,550 USD/TEU และ 2,900-3,050 USD/FEU แต่มีการปรับเพิ่มการเรียกเก็บค่า FAF ในอัตรา 69 USD/TEU ในขณะที่ เส้นทาง Europe ค่าระวางช่วงครึ่งเดือนแรกของเดือนเมษายน ค่าระวางคงที่อยู่ที่ 3,900 USD/TEU และ 7,700 USD/FEU โดยปัจจุบันยังคงพบปัญหาการขาดแคลนตู้ และพบปัญหาความหนาแน่นภายในท่าเรือ Transshipment Ports เช่น Tanjung Pelepas และสิงคโปร์ ซึ่งสายเรือแจ้งว่าอาจสามารถรับ Booking ได้ช่วงปลายเดือนเมษายน

ส่วนเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนแรกของเดือนเมษายน ค่าระวางฝั่ง West Coast คงที่อยู่ที่ 3,200 USD/TEU และ 4,000 USD/FEU ในขณะที่ค่าระวางตู้ 20' ของฝั่ง East Coast ปรับเพิ่มขึ้นเล็กน้อย 20 USD/TEU ส่วนค่าระวางตู้ 40' ปรับลดลง 50 USD/FEU ทำให้ค่าระวางอยู่ที่ 3,720 USD/TEU และ 4,650 USD/FEU ซึ่งขณะนี้ยังคงพบปัญหาขาดแคลนระวางเรือ และขาดแคลนตู้ทั้ง 20' และ 40' โดยเฉพาะฝั่ง East Coast อย่างไรก็ตาม จากสถานการณ์ในเมียนมาร์ ที่ไม่สามารถส่งออกได้ ทำให้ไทยอาจได้ Space เรือเพิ่มบางส่วนจากกรณีนี้

CONTAINER FREIGHT RATE (REEFER)

ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	1,200	1,300	USD 40/TEU, USD 80/FEU	Effective till 30-Apr-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 156/TEU, USD 312/FEU + PSS: USD 100/TEU, USD 200/FEU	Effective till 14-Apr-2021

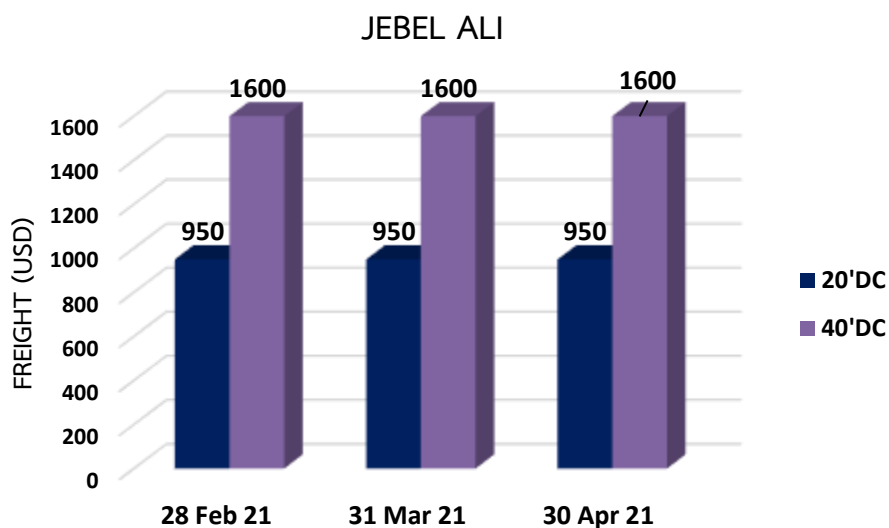
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-ญี่ปุ่น** เดือน ก.พ. ถึง เม.ย. ปี 2564



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

(Mar.- Apr.21): USD 26/TEU และ USD 51/FEU

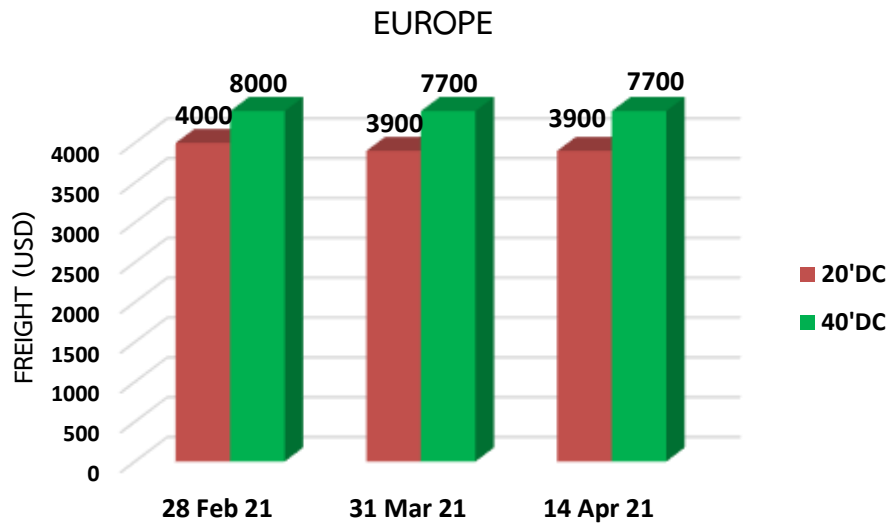
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-Jebel Ali** เดือน ก.พ. ถึง เม.ย. ปี 2564



Subject to

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

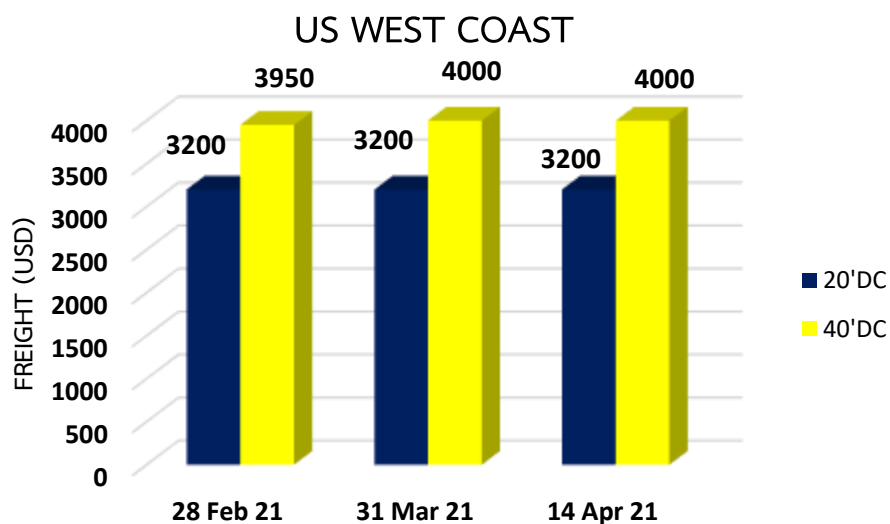
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน ก.พ. ถึง เม.ย. ปี 2564



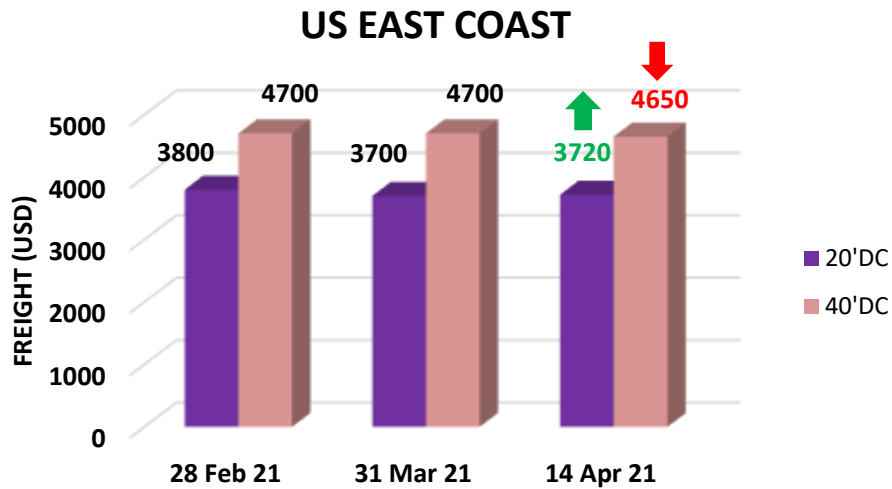
Subject to

- ISOCC (Feb.21): USD53/TEU, USD106/FEU + PSS: USD 500/TEU และ USD 1,000/FEU + LSS (Feb.): USD 20/TEU และ USD 40/FEU
(Mar.-Apr.21): USD71/TEU, USD142/FEU (No PSS & LSS)
- 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 Hapag Lloyd

- ประกาศแจ้งปรับการเรียกเก็บค่า General Rate Increase (GRI) สำหรับสินค้าจากเส้นทาง East Asia ไปยังเส้นทาง East Coast South America โดยมีรายละเอียดดังตาราง

Routing	General Rate Increase (GRI)
East Asia To East Coast South America	Effective 15-Apr-2021
	USD 800/Container

- ประกาศแจ้งการเรียกเก็บค่า Port Congestion Surcharge ของการขนส่งด้วยเรือ Barge สำหรับสินค้าที่ส่งออก และนำเข้าไปยังท่าเรือ Benelux จากท่าเรือ Rotterdam และ Antwerp โดยเรียกเก็บในอัตรา EUR 35/ตู้ มีผลตั้งแต่วันที่ 26 เมษายน 2564 สำหรับ FMC Trades และมีผลวันที่ 13 พฤษภาคม 2564 สำหรับ FMC (USA)

สายเรือ Zim Line

- ประกาศแจ้งปรับการเรียกเก็บค่า New Bunker Factor (NBF) โดยมีรายละเอียดดังตาราง

Routing	New Bunker Factor (NBF)		
	Effective 1 -Jan- 2021	Effective 1 -Apr- 2021	Effective 1 -May- 2021
Far East to Mediterranean/Black Sea & Europe	USD 243/TEU	USD 270/TEU	USD 333/TEU
Mediterranean/Black Sea & Europe to Far East	USD 131/TEU	USD 146/TEU	USD 174/TEU

- ประกาศแจ้งเรียกเก็บค่า Equipment Shortage Surcharge สำหรับสินค้าจากเส้นทาง North Europe มายัง South East Asia ในอัตรา USD 100/TEU มีผลตั้งแต่วันที่ 11 เมษายน 2564
- ประกาศแจ้งเรียกเก็บค่า Congestion Surcharge สำหรับสินค้าที่นำเข้า และส่งออกเส้นทาง North Europe ในอัตรา USD 150/TEU มีผลตั้งแต่วันที่ 11 เมษายน 2564

Shippers demand more detail about post-Suez blockage service disruptions and blanks

European Shippers' Council says cargo owners need carriers to provide better information and greater consideration to their customers to help minimise supply chain delays, as Maersk reopens for short-term bookings after being 'successful with a number of mitigation efforts'. Shipping lines are failing to provide Europe's shippers with enough information about service disruptions and port rotations following the Suez Canal closure, according to Jordi Espin, strategic relations manager at the European Shippers' Council.

Europe's container terminals have been operating at subdued levels this week due to the Suez closure. However, vessels delayed in Suez queues or re-routed around the Cape of Good Hope are expected to arrive en masse over the next week. Congestion, equipment shortages, blank sailings and void port calls are expected to disrupt services for a number of weeks.

Espin told Lloyd's Loading List that the information provided by carriers was not detailed enough to allow logistics managers to plan around the disruption. "During the closure and since we've had information from lines saying our cargo will be delayed – but I'm sorry, we already know this," he said. "What about the current blank sailings programme being implemented? What about Jebel Ali being skipped on the way to Asia? "We need more information. Which containers have been re-routed via the Cape or elsewhere? How long do they estimate the domino effect will take place for? How are they going to adjust future sailing loops? This is what we're not getting told."

Espin called Suez a turning point in the liner-shipper relationship. "Unless shipping lines deliver an important message to the maritime community on how the trade will be managed from now on, the trust chain between shippers and carriers will be broken," he added. "We guess there's going to be a lot of disruption and port congestion in the coming weeks. What we don't know is how it's going to be managed. Reliable and official information channels from shipping lines do not exist and this lack of initiative feeds false operational expectations."

Expected delays

As reported in Lloyd's Loading List, carriers are expecting congestion at Europe to build in the coming weeks. "Especially in North Europe, the congestion issues will be quite significant in the next four weeks," said Rolf Habben Jansen, Chief Executive Officer of Hapag-Lloyd. "When we look at cases like Rotterdam or the UK, we will be looking at alternatives to make sure we don't lose any time.

"We do expect that the most services will miss one or two sailings, which will impact the available capacity in Q2."

Loss of Asia-Europe capacity

Espin said shippers were expecting a loss of capacity of around 20-30% departing Europe in April and May due to the disruption of vessel arrivals, but he urged carriers to "prove they are customer-centred" and do their utmost to avoid so many blanked sailings. "Now vessels are going to arrive all in one go. They will have to go back to Asia. If there's not a smart rescheduling of loops, then we are going to face low availability departures from Europe," he highlighted. "If they don't do that, they'll be showing they're only interested in profits, not customers."

Shippers fearful of serious disruptions

He said shippers were fearful that supply chains will face serious disruptions with so many components and products coming from Asia. "They know the product is delayed, so if they can identify how long the delay will be, then they can look for alternatives to overcome the problem until their container arrives," he added. "The unique point now is to service shippers: to know when and where the container will be dropped and collected for departure, and that all these disruptions will not be transformed only into costs, surcharges and

bills. “Now is the time for real transparency and trustful information, not just for information brochures saying that the vessel is just late or that departing cargo will not be accepted until four weeks later. Lines are integrating, so use this capability to help manage this, not just to make money.”

Maersk advice

Maersk advised customers yesterday that Suez Canal sailings were now starting to normalise after the carrier saw some 50 vessels delayed for a week due to the Suez blockage. “While we still expect the canal closure to impact schedules and port calls well into May, as vessels are brought back on their fixed schedules, our people are working relentlessly with all the data at hand to alleviate the knock-on effects of the Suez blockage,” it said. “While the impact is still significant in certain areas, we have been successful with a number of mitigation efforts. We are therefore very pleased to be able to open for short-term bookings including Spot bookings again, starting already this week for some of the affected trades.”

Europe demand spikes

The Suez Canal closure and the supply chain difficulties it will cause come just as demand from Europe’s manufacturing sector for parts and components peaks. The March IHS Markit Eurozone Manufacturing PMI recorded operating conditions at their most intense in the 24 years of data collection by the analyst. “After accounting for seasonal factors, the headline PMI surged to 62.5, up from February’s 57.9 and indicative of a considerable strengthening of sector performance,” reported IHS Markit. “The index has now registered above the 50.0 ‘no change’ mark that separates growth from contraction for nine months in succession.”

Growth was broad-based across the region, with Germany and the Netherlands leading the way. Both nations recorded their highest ever PMI levels in March. However, the further strengthening of trade, orders and production placed further strain in March on already stretched supply chains, with average lead times for the delivery of inputs lengthened at an “unprecedented rate” as challenges in sourcing inputs due to product shortages, stronger global demand and ongoing logistical challenges linked to COVID-19.

Chris Williamson, Chief Business Economist at IHS Markit said that while Eurozone manufacturing was “booming”, the “picture is blighted” by record supply chain disruptions which will “likely be exacerbated further by delays arising from the Suez Canal blockage”.

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

Carriers warn of looming post-Suez China box shortage

The availability of container equipment at China’s export hubs will decline sharply in mid-April and well into May in the wake of the Suez Canal blockage, carriers are warning, with the heavily used 40-foot boxes in particularly short supply. This raises the prospect of another rate surge out of China, where short-term prices are already at highly elevated levels on the trans-Pacific and Asia-North Europe trades. With ship delays in Europe of up to two weeks as a result of the six-day Suez Canal closure and subsequent congestion as vessels arrive at hub ports in close succession, carriers have warned that repositioning containers will be severely affected. This will apply mostly to 40-foot containers, which accounts for around 75 percent of boxes on the major east-west trades.

Maersk and Hapag-Lloyd outlined their equipment concerns in separate press briefings this week, citing the knock-on effects of the Suez blockage. The shortage of equipment will be felt acutely on the trans-Pacific trade, where US retailers expect import volumes to remain at record or near-record levels through August as they scramble to replenish inventories in preparation for the busy back-to-school and holiday shopping seasons.

“With five to 11 days' delay at ports in Asia, there will also be delays in equipment, particularly 40-foot containers,” James Wroe, head of Asia Pacific liner operations center at Maersk, said Friday. He told reporters the equipment shortage would be felt across Chinese ports, as well as in the South Korean hub of Busan, with the availability of empties beginning to normalize from May 10.

“The impact of this will begin in April in Shanghai, starting with containers for pickup in the week of April 12,” Wroe said. “The following week starting April 19 through to the beginning of May will see the largest impact when empty containers coming back to Asia are delayed, and import returns are lower.”

Hapag-Lloyd CEO Rolf Habben Jansen told reporters this week that shippers should expect the availability of containers in Asia to be tight for another six to eight weeks. “Equipment remains tied up on ships waiting outside ports and from extended dwell and transit times on the land side,” he said, adding that Hapag-Lloyd has made significant investment in new containers, with an additional 300,000 TEU joining the fleet over the past year.

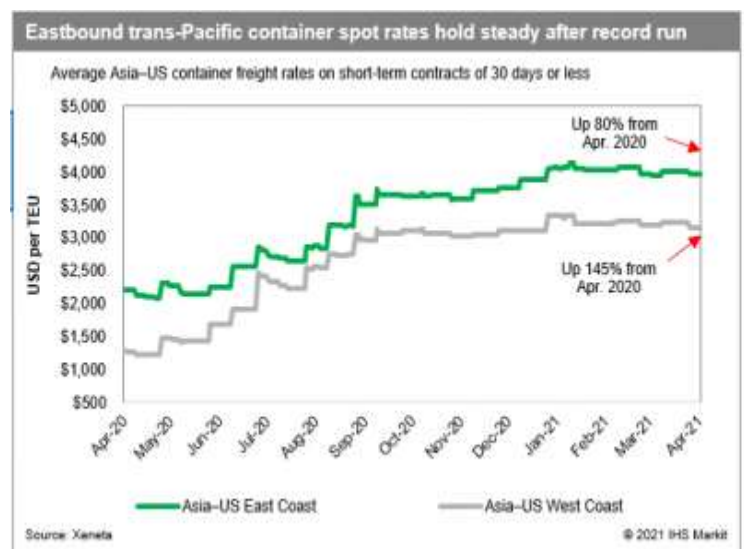
China box supply starts to tighten

A spokesman for ContainerXChange, which produces the container availability index (CAx), said the severe equipment shortages experienced in China in 2020 and early 2021 had begun to ease after the Lunar New Year, with more empty containers arriving in Shanghai that were being exported. But that trend is now in reverse, with CAx values dropping in Shanghai this week, and expected to fall further.

“We expect the liquidity to remain stable for the next two weeks and then drop quite significantly for a period of at least two to three weeks, pushing back the recovery across Chinese ports and keeping it difficult for exporters to find available equipment, [leading to high container prices and freight rates,” the CAx spokesman said. Jon Monroe, a consultant to non-vessel-operating common carriers (NVOs), said in a recent note to customers that given most vessels on the Asia to Europe trade were in the 18,000 to 24,000 TEU class, the number of empties being delayed is considerable.

“Most carriers will have this issue,” he said. “Vessel port rotations in Asia are already out of sync. Qingdao might be the worst of all ports as it pertains to containers and space, since it is first port of call on many services and sometimes gets skipped as carriers move direct to Ningbo and Shanghai.”

Asia-Europe and trans-Pacific container freight rates skyrocketed last summer as rampant demand in Europe and North



America resulted in the slowing of global container circulation, which removed available capacity from the entire international supply chain. Rate marketplace Freightos has predicted the looming equipment shortages in Asia will again push up freight rates on the major east-west trade lanes. “The reduction in capacity and the resulting additional shortage of containers back in Asian-origin ports could put renewed pressure on ocean rates,” said Judah Levine, research lead at Freightos.

Short-term rates for 90 days or less from Asia to North Europe fell 1.7 percent this week to \$7,637 per FEU on April 9, up 419 percent year over year and 531 percent higher compared to the same week in 2019, according to data from rate benchmarking platform Xeneta. The rate from China to US West Coast ports remained flat at \$4,014 per FEU this week, up 176 percent year over year, and an increase of 145 percent compared to the same week in 2019.

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

Ripples from Suez ending in waves of price rises on all container tradelanes

There are reports of “sharp increases” in Asia-Europe container spot rates this week, as the fallout from the week-long Suez Canal blockage restricts both vessel and equipment capacity in Asia. Today’s Ningbo Containerized Freight Index (NCFI) North Europe and Mediterranean component jumped by 8.7%, almost matching the 8.6% increase on the Shanghai Containerized Freight Index (SCFI). “Carriers collectively pushed up rates for April voyages and booking prices rose sharply,” said the NCFI commentary.

According to Drewry’s WCI index, rates from Asia to North Europe were up 5% this week, to \$7,852 per 40ft, but in practice shippers are paying much more – if they can find a line to accept bookings. “Spot rates are being driven up, and longer-term or contract rates are effectively worthless,” said UK-based forwarder Westbound Logistics. “There is already limited equipment and booking availability, which is varying from line to line and from origin to origin. Finding a line with a booking slot has become a struggle and when slots are found, they will go quickly if the booking is not confirmed immediately.

“This means when we quote a spot rate, we may only have a very limited time – sometimes only 10-15 minutes – before that quote becomes unavailable to book,” said Westbound. Moreover, it seems the situation for shippers could get much worse before it gets better. During a press briefing yesterday, Hapag-Lloyd CEO Rolf Haben Jansen said: “Box availability will be tight for the next six to eight weeks. “We expect most services will miss one-to-two sailings, which will impact available capacity in Q2.” He added, however, that he was “optimistic” of a “return to normalcy in Q3”.

Meanwhile, on the transpacific tradelane, the Freightos Baltic Exchange (FBX) reading for Asia to the US west coast increased 4% this week, to \$5,375 per 40ft, 251% higher than for the same week of last year, while for the east coast, the FBX was up 2%, to \$5,868 per 40ft – 108% up on the year before. Transpacific BCOs are in the final stages of contract negotiations with carriers, which, according to reports to *The Loadstar*, are “not negotiations at all but demands by the shipping lines”.

And, according to Jon Monroe, of Washington state-based Jon Monroe Consulting, some carriers are reducing the MQC (minimum quantity commitment) for BCO annual contracts in order to allocate more space for premium-rated business. He said: “It is not that carriers do not have space. It is that they only have a limited amount of space for the very high-paying FAK cargo.”

Elsewhere, the hitherto stable transatlantic tradelane is also starting to see some enormous increases in rates. “Continued strong demand and scarce capacity sent rates spiking this week,” said Freightos research lead Judah Levine, who noted that prices from Europe to North America had jumped 30% to a multi-year high of \$2,851 per 40ft, and reflected a 55% increase since the start of the year. Indeed, the rate hike contagion has spread to almost all tradelanes, and that is going straight to the bottom lines of the carriers, with, for

example, Cosco Shipping saying this week it expects to post a net profit of \$2.3bn just for the first quarter, having seen a 55% increase in its average rate compared with Q4 20.

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 2 April 2021	Current Index 9 April 2021
Comprehensive Index			2585.42	2652.12
Service Routes				
Europe (Base port)	USD/TEU	20%	N/A	N/A
Mediterranean (Base port)	USD/TEU	10%	N/A	N/A
USWC (Base port)	USD/FEU	20%	N/A	N/A
USEC (Base port)	USD/FEU	7.50%	N/A	N/A
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	N/A	N/A
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	N/A	N/A
East/West Africa (Lagos)	USD/TEU	2.50%	N/A	N/A
South Africa (Durban)	USD/TEU	2.50%	N/A	N/A
South America (Santos)	USD/TEU	5.00%	N/A	N/A
West Japan (Base port)	USD/TEU	5.00%	N/A	N/A
East Japan (Base port)	USD/TEU	5.00%	N/A	N/A
Southeast Asia (Singapore)	USD/TEU	7.50%	N/A	N/A
Korea (Pusan)	USD/TEU	2.50%	N/A	N/A

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