

Weekly Briefing (25 July 2022)



01

THB rate / currencies



USD

36.32



EUR

36.38



GBP

43.07



AUD

24.54



CNY

5.4



JPY

0.2631



INR

0.4555



VND

0.0015

02

Exchange rate trend to USD (YTD)



03

Crude Oil price & Gold (17 Jul - 21 Jul 2022)



Oil	OPEC	Brent	WTI
USD/Barrel	96-105	102-111	100-108

Oil Price (Jan 2019 - Jul 2022)



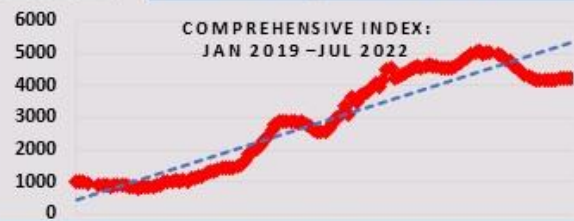
Gold 1695-1721 USD/Ounces

Oil Price (Jan 2019 - Jul 2022)



04

Freight Index (SCFI Comprehensive Index)



Freight Index (SCFI Comprehensive Index)

15-Jul-22	22-Jul-22
4,074.70	3,996.77

-77.93

05

Weekly Top's Stories

รายละเอียดข่าว/บทความ



- UK inflation hits new 40-year high as cost-of-living crisis deepens

รายละเอียดเพิ่มเติม : <https://cnb.cx/3IVqqOx>


- 'Lines banging on our door' as spot rates tumble and peak season disappoints

รายละเอียดเพิ่มเติม : <https://bit.ly/3ovAd55>

การอัปเดตค่าระวางเรือประจำสัปดาห์

สัปดาห์ที่ 29 พ.ศ. 2565



สรุปค่าระวางเรือประจำสัปดาห์

"หมายเหตุ: อัตราค่าระวางที่ปรากฏเป็นอัตราฐานของสายเรือที่ประกาศเป็นทางการ ซึ่งอาจต่ำกว่าอัตราที่มีการเรียกเก็บจริงจากผู้ส่งออก"

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	SIZE		Low Sulphur Surcharge (LSS)	Remark
	USD/20'	USD/40'		
Thailand - Shanghai	900	1,600	Subject to ISOCC USD 69/TEU, USD 138/FEU	Effective till 31-Jul-2022
Thailand - Qingdao				
Thailand - Hong Kong	700	1,300		
Thailand - Japan (Main Port)	650	1,300		
Thailand - Kaohsiung	900	1,700		
Thailand - Klang	650	1,200	Subject to ISOCC USD 40/TEU, USD 80/FEU	
Thailand - Jakarta	650	1,200		
Thailand - Ho Chi Minh (Cat Lai)	550	1,050		
Thailand - Singapore	600	1,250		
Thailand - Manila	800	1,500		
(North & South)	Subject to CIC at destination			
Thailand - Jebel Ali	3,900	6,800	Subject to ISOCC USD 101/TEU, USD 202/FEU War Risk Surcharge: USD 35/TEU, USD 70/FEU	
Thailand - South Korea (Busan)	500	1,000	LSS: USD 220/TEU, USD 440/FEU	
Thailand - South Korea (Incheon)	600	1,200		
Thailand - Nhava Sheva	4,100	6,100	ISOCC: USD 80/TEU, USD 160/FEU	
Thailand - Melbourne	3,600-3,750	7,200-7,435	FAF: USD 325/TEU, USD 650/FEU	
Thailand - Sydney				
Thailand – Durban / Cape Town	4,300	7,600	Subject to ISOCC USD 169/TEU, USD 338/FEU	
	Subject to SCMC USD 30/BL			
Thailand – Europe (Main Port) (Rotterdam/Antwerp/Hamburg/ Le Havre)	6,250	10,400	ISOCC: USD 124/TEU, USD 248/FEU LSS: USD 20/TEU, USD 40/FEU	
	Subject to ENS USD 30/BL			
Thailand - US West Coast	5,520	6,900		
Thailand - US East Coast	7,840	9,800		
(NY/Savannah/Baltimore/Norfolk)	Subject to Panama Low Water USD 30-60/Container			

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

สถานการณ์ค่าระวางในช่วงเดือนกรกฎาคม 2565 ค่าระวางในเส้นทางเอเชียคองที โดยเส้นทาง Shanghai ค่าระวางคองที อยู่ที่ 900 USD/TEU และ 1,600 USD/FEU เส้นทาง Klang ค่าระวางคองทีอยู่ที่ 650 USD/TEU และ 1,200 USD/FEU เส้นทาง Hong Kong ค่าระวางคองทีอยู่ที่ 700 USD/TEU และ 1,300 USD/FEU และเส้นทาง Japan ค่าระวางคองทีอยู่ที่ 650 USD/TEU และ 1,300 USD/FEU แต่ค่า Low Sulphur Surcharge มีการปรับลดลง ส่วนสถานการณ์ตู้ พบว่าตู้ 20' บางส่วนพบปัญหาขาดแคลน ในขณะที่สถานการณ์ระวางยังไม่พบปัญหา สำหรับเส้นทาง Durban ค่าระวางคองทีเช่นเดียวกัน อยู่ที่ 4,300 USD/TEU และ 7,600 USD/FEU ในขณะที่ค่า Low Sulphur Surcharge ปรับเพิ่มขึ้น

ส่วนเส้นทางออสเตรเลีย ค่าระวางปรับเพิ่มขึ้น 50 USD/TEU และ 85 USD/FEU ทำให้ค่าระวางอยู่ที่ 3,600-3,750 USD/TEU และ 7,200-7,435 USD/FEU โดยค่า FAF ปรับเพิ่มขึ้น ในขณะที่ เส้นทาง Europe ค่าระวางช่วงครึ่งเดือนหลังของเดือนกรกฎาคม ค่าระวางคองที ทำให้ค่าระวางอยู่ที่ 6,250 USD/TEU และ 10,400 USD/FEU

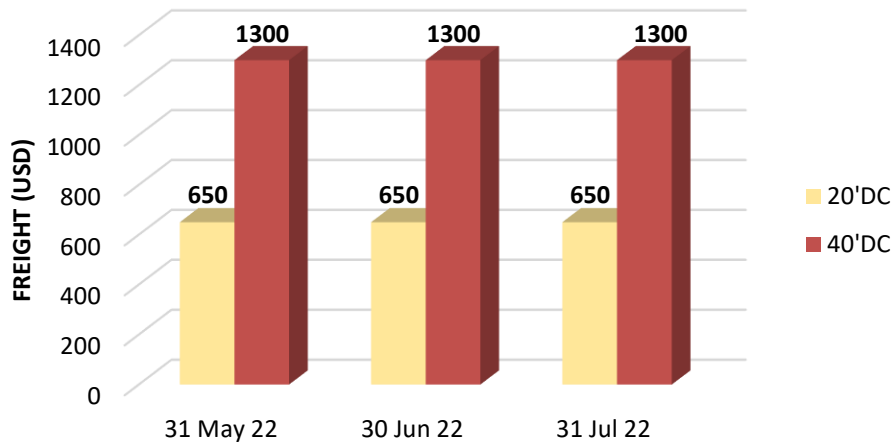
ส่วนเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนหลังของเดือนกรกฎาคม ค่าระวางฝั่ง West Coast ปรับลดลง 400 USD/TEU และ 500 USD/FEU ทำให้ค่าระวางอยู่ที่ 5,520 USD/TEU และ 6,900 USD/FEU ในขณะที่ค่าระวางฝั่ง East Coast ปรับลดลง 160 USD/TEU และ 200 USD/FEU ทำให้ค่าระวางอยู่ที่ 7,840 USD/TEU และ 9,800 USD/FEU โดยสถานการณ์ตู้ดีขึ้น รวมถึงสถานการณ์ระวางคลี่คลายลงอย่างต่อเนื่อง

CONTAINER FREIGHT RATE (REEFER)

ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20’	USD/40’		
Thailand-Hong Kong	-	3,000	USD 207/FEU	Effective till 31-Jul-2022
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	1,800	2,300-2,500	OBS: USD 188/TEU, USD 376/FEU	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	9,000	13,000	OBS: USD 591/TEU, USD 1182/FEU	
London Gateway / Southampton	10,000	14,000		

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-ญี่ปุ่น** เดือน พ.ค. ถึง ก.ค. ปี 2565

JAPAN



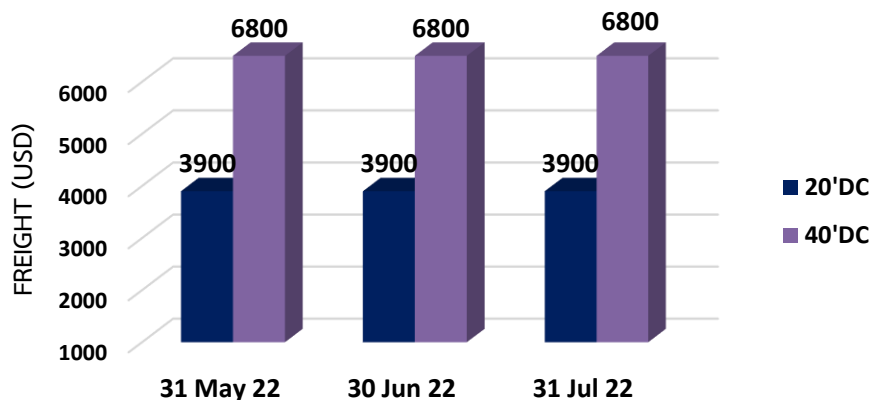
Subject to Low Sulphur Surcharge (May 22): USD 115/TEU และ USD 230/FEU

(Jun. 22): USD 92/TEU และ USD 184/FEU

(Jul. 22): USD 69/TEU และ USD 138/FEU

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-Jebel Ali** เดือน พ.ค. ถึง ก.ค. ปี 2565

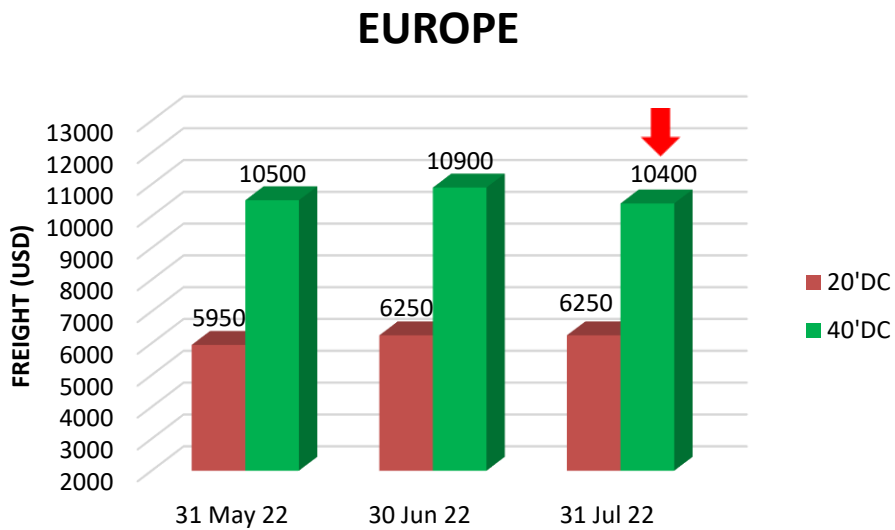
JEBEL ALI



Subject to

- Low Sulphur Surcharge (May 22): USD 124/TEU และ USD 248/FEU
(Jun. 22): USD 79/TEU และ USD 158/FEU
(Jul. 22): USD 101/TEU และ USD 202/FEU
- War Risk Surcharge: USD35/TEU และ USD70/FEU

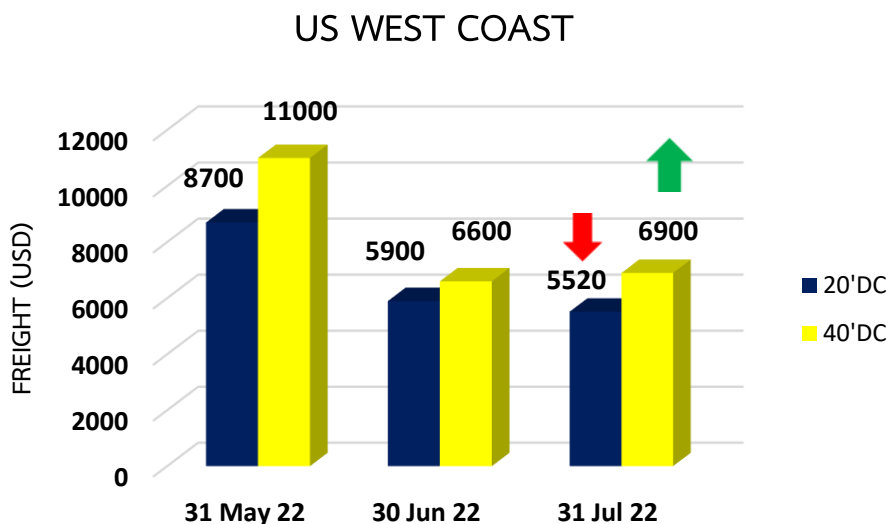
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน พ.ค. ถึง ก.ค. ปี 2565



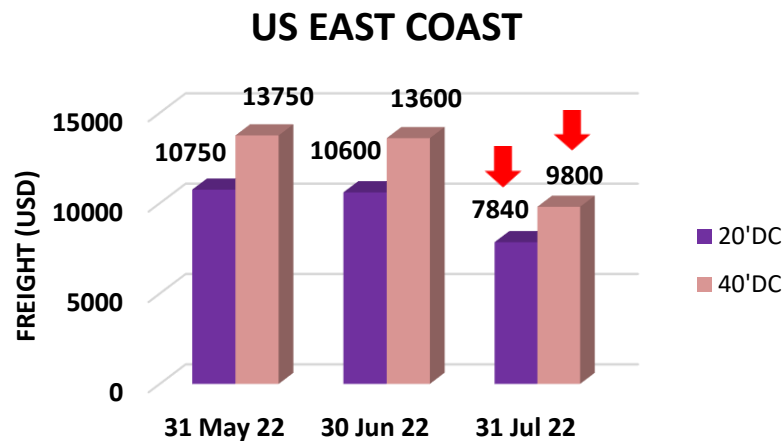
Subject to

- ISOCC (May 22): USD177/TEU, USD354/FEU + LSS: USD20/TEU, USD40/FEU (Effective from 15-May-22)
(Jun. 22): USD141/TEU, USD282/FEU + LSS: USD20/TEU, USD40/FEU
(Jul. 22): USD124/TEU, USD248/FEU + LSS: USD20/TEU, USD40/FEU
- ENS: USD30/BL

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-สหรัฐอเมริกา West Coast เดือน พ.ค. ถึง ก.ค. ปี 2565



กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-สหรัฐอเมริกา East Coast เดือน พ.ค. ถึง ก.ค. ปี 2565



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

Lines banging on our door' as spot rates tumble and peak season disappoints

Container spot rates from Asia to Europe and the US are coming under increased pressure, as the peak season appears “muted” at best. Freight rates from China fell this week on 19 of the 21 routes covered by the Ningbo Containerized Freight Index (NCFI), with its China-Europe and China-US components in particular dragged down by “insufficient volume”.

The NCFI commentary said “most carriers” had been obliged to discount as spot rates “continue to decline”. Spot rates for North Europe fell to \$9,092 per 40ft this week, according to Drewry’s WCI index, although a CEO of a UK forwarder told *The Loadstar* recently it had been offered a rate of \$7,000 per 40ft through August. “They were not interested a month ago, but now the carriers are banging our door down for business again,” he said.

For Mediterranean ports, the WCI recorded a 5% fall for the week, to \$10,300 per 40ft as that market also came under pressure. On the transpacific, the spot rate decline is accelerating, with all the indices in the red again this week; with, for example, Xeneta’s XSI reading for Asia to the US west coast losing 7%, to \$6,856 per 40ft.

Rates on the tradelane have tumbled by over 50% since the start of the year; 12 months ago, as the peak season kicked in, BCOs were struggling to secure space on the transpacific US west coast route at rates three times higher than the current level, after premium fees were factored in. “A decrease in consumer demand, together with the high starting point and the fact that many importers shipped peak season orders earlier in the year, could account for falling rates and volumes that, nonetheless, remain high by pre-pandemic standards,” said Judah Levine, Freightos Group’s head of research.

However, rates for the US east coast are more robust, due to the impact of port congestion, with the Freightos Baltic Index (FBX) component down just 1% this week, to \$9,922 per 40ft. During the Seko Logistics media day presentation this week, Akhil Nair, VP global carrier management and ocean strategy, said retailers had been cancelling orders against a background of “climbing inventory levels”. He said: “We expect a marginal peak, a muted peak, but nowhere close to what we have seen in either the second half of 2020 or all of 2021.”

Nevertheless, he added, although there had been a decline in freight rates recently, he did not believe they would fall back to pre-pandemic levels, as shipping lines would cut capacity if demand fell. Mr Nair said he expected carriers would resort to “more structured” blank sailings if, and when, the current port congestion-related ‘operational’ blank sailings unwind, to mitigate any short-term demand reduction. The bright spot for carriers this week was on the transatlantic, where the FBX component ticked up another 2%, to \$8,423 per 40ft. “Port congestion, with strong demand for the different mix of goods shipped from Europe, has kept transatlantic rates climbing,” said Mr Levine, noting that rates on the route had increased by a third since the start of the year.

Source: <https://theloadstar.com/>

Shipping lines handling Ukrainian cargo are beginning to loosen the terms on which freight can be transported into the country.

They are reducing some of the complications of importing non-military supplies into the country, which has been at war with Russia since 24 February. Freight costs to and from Ukraine have increased as a result of the war, mainly because shipping lines that can no longer insure cargo or equipment moving into a war zone are demanding hefty deposits for equipment as protection.

Restrictions on the use of containers has meant that Black Sea ports such as Constanta in Romania and Varna, further south in Bulgaria, and dry ports on Ukraine’s western border have been forced to destuff containers before delivering freight by truck, raising costs and slowing goods transit. Some freight forwarders are now reporting lines are looking for ways to relax the terms on which freight into Ukraine is delivered with trusted partners. One source told *The Loadstar*: “Some regional and international lines have relaxed their requirements for individual forwarders; this is not a policy, but a shift that could make things easier for importers as well as exporters.”

Depending on the type of freight and the relationship the forwarder has with a line, the carrier will demand a deposit of between \$3,000 and \$6,000 for a container, or up to \$8,000 for a reefer box. In addition, carriers may also ask for a letter relieving them of any obligations for freight delivery once the cargo enters Ukraine. Daniil Melnychenko, of Odessa-based freight consultancy Informall BG, said: “Some shipping lines allow the movement of import containers to Ukraine via rail only, such as ONE and Zim. Others, including MSC, Maersk, OOCL, CMA CGM and Cosco, allow containers to be transported via trucks and rail, however, a deposit is necessary. Empty drop off is allowed only in certain places in Ukraine or, alternatively, empty containers must be returned to the non-Ukrainian port of pick up.”

None of the containers is allowed to head for the front line, only to dry ports and depots mainly in western Ukraine and Odessa, where there is limited or no fighting. Meanwhile, Informall BG reports, Baltic and Black Sea regional ports are developing new transit corridors. “Ukrainian cargo needs to be moving under minimum checks and accelerated customs procedures, minimising infrastructure and bureaucratic obstacles on the routes, where possible,” said Informall.

Allowing the free flow of containers would expedite deliveries of essential import goods and humanitarian aid to Ukraine from foreign seaports and decrease freight costs. Additionally, with more freight entering Ukraine, there would be more empty containers for export cargo, which would support the country's economy. Even with some lines relaxing their criteria for imports, Informall reports that most carriers remain conservative and continue to follow internal risk-mitigation procedures for inbound equipment.

Vassiliy Vesselovski, CEO of Informall BG, said some lines were looking for alternative solutions to shipping. "I believe more carriers will offer an intermodal service to Ukraine through the western border in time, primarily via railway connections, along with barge and truck services." As the war has unfolded, Ukrainian shippers have paved the way to international markets via container terminals in Poland, at Gdynia and Gdansk, and Lithuania's port of Klaipeda on Baltic Sea. Black Sea ports at Varna in Bulgaria, Constanta in Romania and, more recently, Italy's port of Trieste on the Adriatic are offering intermittent services.

All these routes are supplemental to the major Ukrainian import services through the currently overloaded terminal in Constanta, Romania. "Today, while Ukrainian sea ports remain blocked, cargo is being delivered via complex railway connections and freight trucks in both directions. Freight transport is being delayed at most cross-border points of Ukraine, in both directions, mainly due to multiple bottlenecks on the route," explained Informall.

According to the consultancy, average waiting times for trucks waiting to cross the border into Ukraine is four to five days, while exports to Constanta can take up to nine days. On Ukraine's north-western border with Poland, there are more crossing points, which provide a higher throughput, allowing containerised cargo to and from Gdynia and Gdansk within a more reasonable time.

Daniil Melnychenko, data analyst at Informall, explained: "it took around three-four weeks for Ukrainian shippers and regional transport stakeholders to adapt to the new martial law reality, and start developing alternative routes for containerised cargo. Obviously, those alternatives are much more expensive and less efficient, but when one is committed to continue business during the war, they have no other choice but to take risks and pay the price." Meanwhile, the Kyiv government has also trusted the country's logistics experts and has allocated \$7.4m to the ministry of infrastructure from the reserve fund of the state budget to ensure safe navigation in Ukrainian waters and rail transport in the Danube region.

Source: <https://theloadstar.com/>

PhilaPort readies ocean terminal for more boxes as Asia service launches

Amid the start of its first all-water vessel service from Asia, the Port of Philadelphia is completing existing capital projects and weighing some \$3.5 billion in future upgrades it needs to become more competitive with other US East Coast ports that offer multiple services from Asia and to prevent the types of backlogs that forced the port to temporarily halt ship unloading last year. Wan Hai Lines' new AA9 service from Asia, which will make its first call to Philadelphia next month, uses sub-Panamax ships. But PhilaPort Marketing Director Sean Mahoney said he expects Wan Hai, which has contracts for building 18 post-Panamax ships to be delivered through 2024, will eventually rotate those new ships into its US East Coast services. As such, Philadelphia is looking at how it can ready itself to handle the volumes coming off those larger vessels.

“Once those ships are delivered, that will have a cascading effect,” Mahoney told JOC.com. “We’re getting inquiries from all the carriers about bringing in larger ships and are building the capacity to do so,” US shippers are bringing in more Asian goods to the US East Coast that would have once gone through West Coast ports. For the first six months of 2022, the US East Coast handled 3.445 million TEU in Asian imports, an 11 percent gain from the year-earlier period, data from PIERs, a sister product of JOC.com within S&P Global, shows.

Philadelphia’s total imports grew at about the same rate over the first half of 2022 to 216,947 TEU, according to PIERs. The port only handles a small amount of Asia freight currently. But as a major gateway for food and other agricultural products, Philadelphia saw 29 percent growth in East Coast South America imports and 14 percent growth in imports from the South Pacific, PIERs data shows. Through 2022, over \$1 billion will have been spent on major upgrades of Philadelphia’s port over the previous decade, including dredging the Delaware River to a 45-foot depth and transforming its general cargo terminal to a container terminal with heavier berths and cranes.

Now the port is looking at another \$3.5 billion in upgrades over the coming years, Mahoney said, in order to keep up with additional volumes. Some of those future projects, which have not been funded or fully authorized yet, include revamping the port’s road network, dredging the Delaware down to a 50-foot depth, and adding an additional container berth. But in the near term, PhilaPort is targeting more on- and off-dock space. The Packer Avenue Marine Terminal had to close vessel operations for three days last September due to a backlog of dwelling containers that prevented ships from being unloaded. To that end, Mahoney said that PhilaPort is prioritizing projects that will eventually bring Packer’s capacity from 740,000 TEU to 1.2 million TEU. “We’re making Packer the priority,” Mahoney said.

Much of the remaining work there involves resurfacing of the terminal’s asphalt to ready it for electric gantry cranes. Those cranes, the first of which are due to be delivered in February 2023, will be needed for the denser container stacks at Packer. Mahoney said PhilaPort expects to have somewhere between one-third and half of Packer densified over the next two years. The work at Packer, which also included removing old buildings and beefing up its electrical system, has already been funded through previous capital budgets. But PhilaPort is also seeking another \$20 million from Pennsylvania for the construction of an additional roadway that connects to a northern portion of Packer, making it easier to stage containers away from ship operations.

PhilaPort looks to add transloading

Along with improvements at Packer, PhilaPort is looking at how it can allow for dual use of certain port facilities between containers and its roll-on, roll-off services. PhilaPort expects to complete the construction of a new deepwater berth at its SouthPort Auto Terminal in the next 12 to 18 months, Mahoney said, after receiving \$120 million in federal and state funds for the project. Even though the berth is specifically for roll-on/roll-off (ro/ro) ships, he said it will be built strong enough to support ship-to-shore cranes. “It can start with ro/ro, and then maybe breakbulk or general cargo, and may end up with containers,” Mahoney said.

Mahoney said PhilaPort is also looking at how it can utilize its Pier 98 Annex, which sits between Packer and Southport, for container storage. Although primarily used for storage of cars and other ro/ro cargo, Pier 98

Annex also has a Norfolk Southern rail ramp which PhilaPort hopes could serve as an off-dock intermodal facility, Mahoney said. In addition, PhilaPort is looking for the Pier 98 Annex to also serve as a satellite container yard in the event of another cargo surge hitting the port. He said PhilaPort is in talks with ro/ro operator Glovis on how Pier 98 Annex could be shared with Packer.

In addition, PhilaPort is weighing how it can develop land near CSX Transportation's rail ramp right outside of Packer. The land, which the port calls the Whiskey Yard Container Support Lands, would be used for container storage and warehousing. Mahoney said the port is in talks with the land's current tenants about repurposing it. Demand for transloading services drove PhilaPort to build a 200,000 square-foot warehouse about a half-mile from the port, which Mahoney said is about to receive its first freight. In the coming year, Mahoney said PhilaPort plans to build a similar size refrigerated warehouse in the same area.

"One thing that became very apparent during the surge is that a lot of container shippers want these warehouses very close to port," Mahoney said, adding that PhilaPort is targeting the buildout of 3 million square feet of warehousing near the port, some of which will be done through filling in land between the port's remaining finger piers.

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

ตารางสรุปอัตราค่าระวางจากเอเชียไปเส้นทางต่างๆ อ้างอิงจาก Shanghai Containerized Freight Index (SCFI)

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

Description	Unit	Weighting	Previous Index 15 Jul 2022	Current Index 22 Jul 2022
Comprehensive Index			4074.7	3996.77
Service Routes				
Europe (Base port)	USD/TEU	20%	5612	5570
Mediterranean (Base port)	USD/TEU	10%	6268	6201
USWC (Base port)	USD/FEU	20%	6883	6722
USEC (Base port)	USD/FEU	7.50%	9534	9441
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	3201	2971
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	3186	3143
East/West Africa (Lagos)	USD/TEU	2.50%	6181	6131
South Africa (Durban)	USD/TEU	2.50%	5487	5475
South America (Santos)	USD/TEU	5.00%	9312	9483
West Japan (Base port)	USD/TEU	5.00%	342	342
East Japan (Base port)	USD/TEU	5.00%	347	347
Southeast Asia (Singapore)	USD/TEU	7.50%	1054	1016
Korea (Pusan)	USD/TEU	2.50%	358	353

สรุปรายงานประจำสัปดาห์ พบว่าภาพรวมสถานการณ์ขนส่งค่อนข้างคงที่ ในขณะที่ค่าระวางปรับลดลง สำหรับเส้นทางยุโรป พบว่าความต้องการในการขนส่งสินค้าทุกชนิดยังคงที่ต่อเนื่อง ในขณะที่ค่าระวางปรับลดลงเล็กน้อยจากสัปดาห์ที่ผ่านมา ส่วนในเส้นทางสหรัฐอเมริกา ในภาพรวมพบว่าความต้องการในการขนส่งคงที่ ในขณะที่ supply และ demand มีความสมดุล ส่วนค่าระวางมีการปรับตัวลดลงต่อเนื่อง สำหรับเส้นทางออสเตรเลีย ภาพรวมตลาดขนส่ง และความต้องการสินค้าจำเป็นทุกประเภท อยู่ในระดับสูงต่อเนื่อง ส่วน demand และ supply คงที่ ส่วนค่าระวางปรับลดลงเช่นเดียวกัน สำหรับเส้นทางญี่ปุ่น พบว่า ตลาดการขนส่งและค่าระวาง โดยรวมคงที่ ส่วนเส้นทางอเมริกาใต้ ภาพรวมปริมาณความต้องการในการนำเข้าสินค้าจำเป็นทุกประเภท รวมถึงอุปกรณ์ทางการแพทย์อยู่ในทิศทางที่ดี โดยที่ค่าระวางมีการปรับเพิ่มสูงขึ้น