

Weekly Briefing (7 August 2023)



01

THB rate / currencies



USD

34.64



EUR

38.19



GBP

44.16



AUD

22.81



CNY

4.831



JPY

0.2444



INR

0.419



VND

0.0014

02

Exchange rate trend to USD (YTD)



03

Crude Oil price & Gold (1 Aug - 5 Aug 2023)



Oil	OPEC	Brent	WTI
USD/Barrel	83-87	86-87	79-83



Gold 1933-1949 USD/Ounces



04

Freight Index (SCFI Comprehensive Index)



Freight Index (SCFI Comprehensive Index)

28-Jul-23	4-Aug-23
1,029.23	1,039.32

10.09

05

Weekly Top's Stories

รายละเอียดข่าว/บทความ



1. Arctic Becomes New Pathway For Russian Oil Shipments To Asia
รายละเอียดเพิ่มเติม : <https://bit.ly/3Ynqezg>



2. ILWU Canada contract ratification ensures BC port peace
รายละเอียดเพิ่มเติม : <https://bit.ly/3DM3Cz2>

การอัปเดตค่าระวางเรือประจำสัปดาห์ สัปดาห์ที่ 31 พ.ศ. 2566



สรุปค่าระวางเรือประจำสัปดาห์

"หมายเหตุ: อัตราค่าระวางที่ปรากฏเป็นอัตราฐานของสายเรือที่ประกาศเป็นทางการ ซึ่งอาจสูงกว่าหรือต่ำกว่าอัตราที่มีการเรียกเก็บจริงจากผู้ส่งออก"

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	SIZE		Low Sulphur Surcharge (LSS)	Remark
	USD/20'	USD/40'		
Thailand - Shanghai	130	180	Subject to ISOCC USD 69/TEU, USD 138/FEU	Effective till 31-AUG-2023
Thailand - Qingdao	150	200		
Thailand - Hong Kong	100	150		
Thailand - Japan (Main Port)	400	600		
Thailand - Kaohsiung	200	500		
Thailand - Klang	150	250	Subject to ISOCC USD 40/TEU, USD 80/FEU	
Thailand - Jakarta	200	350		
Thailand - Ho Chi Minh (Cat Lai)	80	150		
Thailand - Singapore	200	300		
Thailand - Manila (North & South)	500	800		
	Subject to CIC at destination			
Thailand - Jebel Ali	850	1,300	Subject to ISOCC USD 67/TEU, USD 134/FEU War Risk Surcharge: USD 35/TEU, USD 70/FEU	
Thailand - South Korea (Busan)	200	400		
Thailand - South Korea (Incheon)	200	400		
Thailand - Nhava Sheva	700	900	ISOCC: USD 71/TEU, USD 142/FEU	
Thailand - Durban / Cape Town	1,263	1,676	Subject to ISOCC USD 113/TEU, USD 226/FEU	
	Subject to SCMC USD 30/BL			
Thailand - Melbourne	450-550	900-1,100		
Thailand - Sydney				
Thailand - Europe (Main Port) (Rotterdam/Antwerp/Hamburg/ Le Havre)	942	1,684	ISOCC: USD 88/TEU, USD 176/FEU LSS: USD 20/TEU, USD 40/FEU	
	Subject to ENS USD 30/BL			
Thailand - US West Coast	1,700	2,200		
Thailand - US East Coast	2,500	3,200		
(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

สถานการณ์ค่าระวางในช่วงเดือน สิงหาคม 2566 ค่าระวางในเส้นทางเอเชียปรับปรุงในหลายเส้นทาง โดยเส้นทาง Shanghai ค่าระวางอยู่ที่ 130 USD/TEU และ 180 USD/FEU เส้นทาง Klang ค่าระวางอยู่ที่ 150 USD/TEU และ 250 USD/FEU เส้นทาง Hong Kong ค่าระวางอยู่ที่ 100 USD/TEU และ 150 USD/FEU และเส้นทาง Japan ค่าระวางอยู่ที่ 400 USD/TEU และ 600 USD/FEU

สำหรับเส้นทาง Durban ค่าระวางเพิ่มขึ้น โดยอยู่ที่ 1,263 USD/TEU และ 1,676 USD/FEU ส่วนเส้นทางเกาหลี ค่าระวางคงที่ โดยอยู่ที่ 200 USD/TEU และ 400 USD/FEU

ส่วนเส้นทางออสเตรเลีย ค่าระวางในครึ่งเดือนแรกของเดือนสิงหาคม ปรับเพิ่มขึ้น โดยอยู่ที่ 450-550 USD/TEU และ 900-1,100 USD/FEU ในขณะที่ เส้นทาง Europe ค่าระวางในครึ่งเดือนแรกของเดือนสิงหาคม ค่าระวางเพิ่มขึ้น โดยอยู่ที่ 942 USD/TEU และ 1,648 USD/FEU ในขณะที่ค่า IMO Sox Compliance Charge คงที่

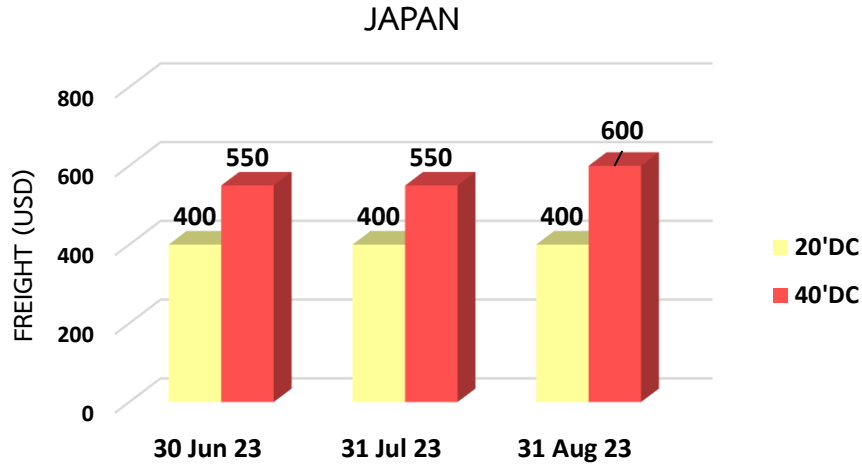
ส่วนเส้นทางสหรัฐอเมริกา ค่าระวางในครึ่งเดือนแรกของเดือนสิงหาคม ค่าระวางฝั่ง West Coast เพิ่มขึ้น โดยอยู่ที่ 1,700 USD/TEU และ 2,200 USD/FEU ในขณะที่ค่าระวางฝั่ง East Coast เพิ่มขึ้นเช่นเดียวกัน โดยอยู่ที่ 2,500 USD/TEU และ 3,200 USD/FEU

CONTAINER FREIGHT RATE (REEFER)

ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong	900 *	1,000 *	All-in	Effective till 31-AUG-2023
Thailand-Shanghai				
Thailand-Japan (Tokyo, Yokohama)	1,100	1,300	OBS: USD 85/TEU, USD 170/FEU	
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	1,700	1,900	OBS: USD 327/TEU, USD 654/FEU	
London Gateway / Southampton	1,700	1,900		

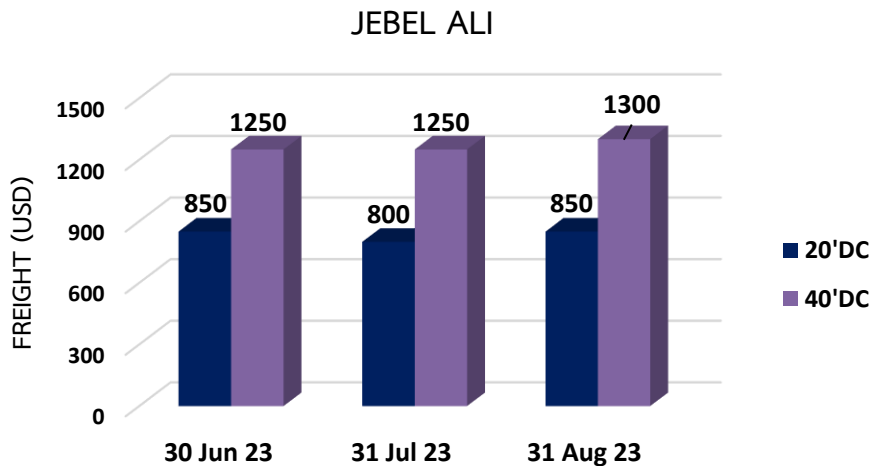
(*) ค่าระวางอาจมีความแตกต่างในการใช้บริการจริงเนื่องจากอยู่ในช่วง High Season

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-ญี่ปุ่น** เดือน มิ.ย. ถึง ส.ค. ปี 2566



Subject to Low Sulphur Surcharge (Jun. 23): USD 69/TEU และ USD 138/FEU
(Jul. 23): USD 57/TEU และ USD 115/FEU
(Aug. 23): USD 69/TEU และ USD 138/FEU

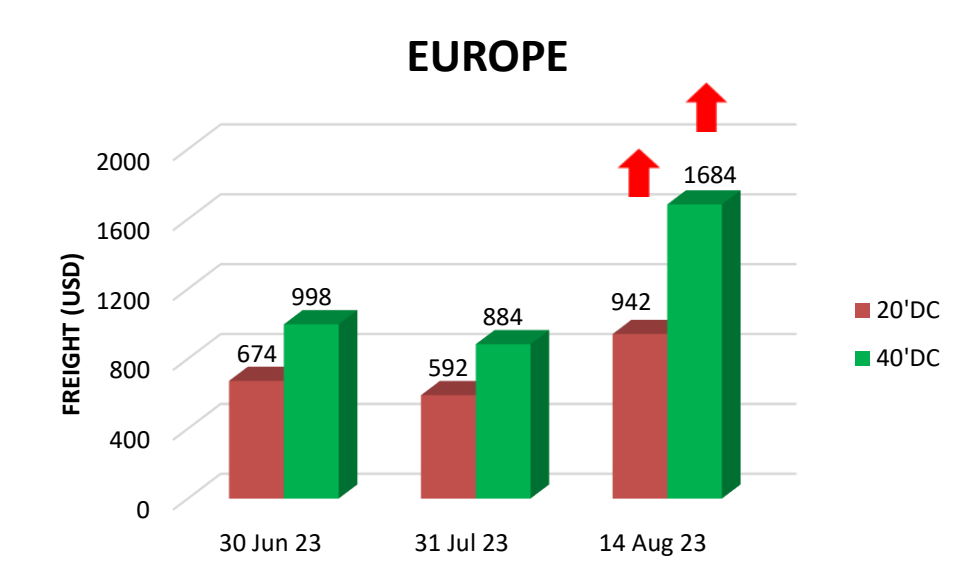
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง **ไทย-Jebel Ali** เดือน มิ.ย. ถึง ส.ค. ปี 2566



Subject to

- Low Sulphur Surcharge (Jun. 23): USD 56/TEU และ USD 112/FEU
(Jul. 23): USD 56/TEU และ USD 112/FEU
(Aug. 23): USD 67/TEU และ USD 134/FEU
- War Risk Surcharge: USD35/TEU และ USD70/FEU

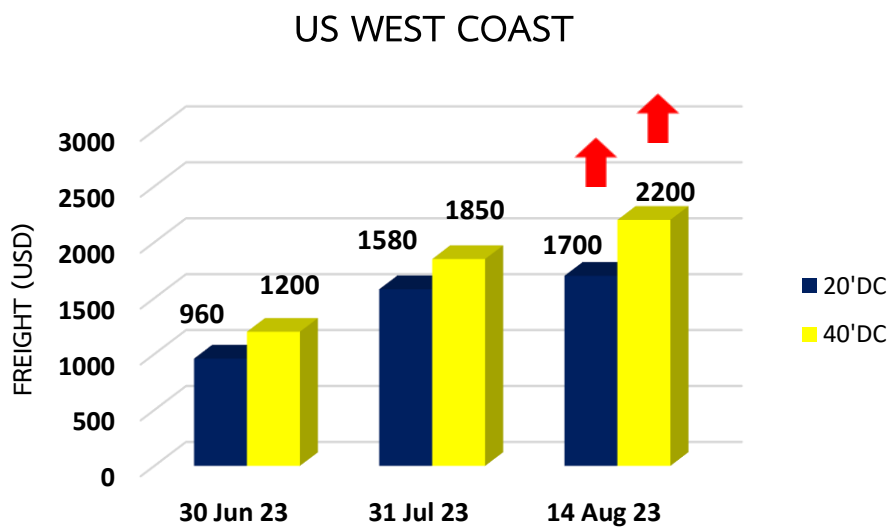
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน มิ.ย. ถึง ส.ค. ปี 2566



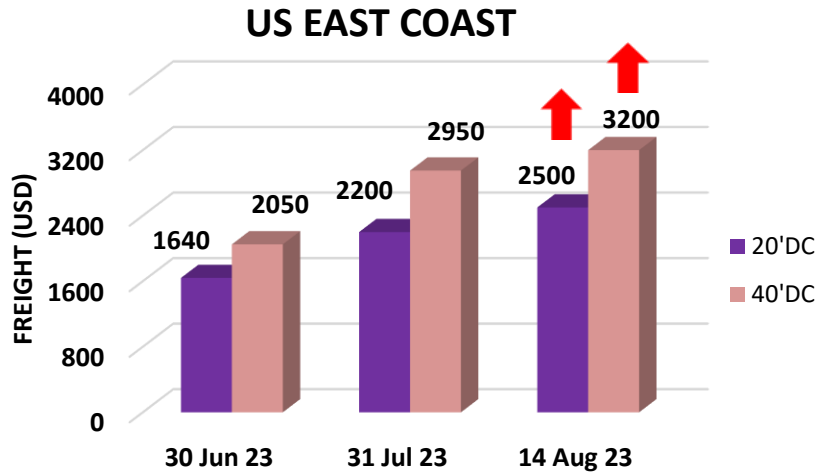
Subject to

- ISOCC (Jun. 23): USD106/TEU, USD212/FEU + LSS: USD20/TEU, USD40/FEU
(Jul. 23): USD88/TEU, USD176/FEU + LSS: USD20/TEU, USD40/FEU
(Aug. 23): USD88/TEU, USD176/FEU + LSS: USD20/TEU, USD40/FEU
- ENS: USD30/BL

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-สหรัฐอเมริกา West Coast เดือน มิ.ย. ถึง ส.ค. ปี 2566



กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-สหรัฐอเมริกา East Coast เดือน มิ.ย. ถึง ส.ค. ปี 2566



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

Ocean carriers, retailers failing in drive to decarbonize: Ship It Zero

Ocean carriers and retailers earned poor grades in a decarbonization report card published Thursday, with environmental coalition Ship It Zero claiming container shipping is relying on the “false solutions” of liquefied natural gas (LNG) and scrubbers while retailers are failing to track their Scope 3 emissions.

The Shipping Decarbonization Report Card was designed to evaluate major retailers and shipping carriers on their commitment to rapid decarbonization and development of zero-emission fuels for maritime shipping. Its findings claim there’s been a distinct lack of progress from the world’s largest retailers and ocean carriers.

“While the globe is burning, retailers and cargo carriers are doing little to address emissions from shipping their goods,” Eric Leveridge, Pacific environment lead for Ship It Zero, said in a statement. “Home Depot, Lowe’s, Walmart, Amazon and CMA CGM in particular are failing to clean up their shipping pollution while Mediterranean Shipping Company, Ocean Network Express and HMM are barely passing.”

Ship It Zero is a coalition of environmental and public health advocates, scientists, shipping experts and shippers working to get some of the largest companies in the world to commit to zero-emission shipping by 2030.

In compiling the report card, the coalition’s researchers reviewed retailers’ and carriers’ corporate social governance reports, climate disclosure project reports and press releases to track decarbonization commitments and emissions disclosures. Carriers were given extra credit for absolute emissions reductions and green fuel contracts, but points were deducted for emissions increases and reliance on “false solutions” such as LNG and scrubbers.

“Our report card clearly shows that, while some retailers and cargo carriers have made progress, there’s still a long way to go,” said Kendra Ulrich, shipping campaigns director for Stand.earth, a member of the Ship It Zero coalition.

“Decarbonizing the shipping industry is urgent and we are putting retailers and their cargo carriers on notice,” she added.

No ‘meaningful action’

Ship it Zero noted that many major retailers were not quantifying their complete Scope 3 emissions, defined as emissions the company was indirectly responsible for through its supply chain.

Scope 3 emissions cover all indirect emissions generated in the upstream and downstream activities of a company, including all purchased goods and services, business travel, waste disposal and transportation and distribution.

“Among those that are reporting Scope 3 emissions, most exclude maritime shipping from their reporting,” the report card found, with companies such as Amazon and Target “yet to take enough meaningful action to operationalize their shipping decarbonization commitments.”

IKEA scored the highest marks among the retailers with a B+ that the report card attributed to the Swedish retailer’s strong “general decarbonization commitment” and its target of zero-emission ocean shipping by 2040. Most of the retailers — which included Nike, adidas, Walmart, Home Depot and Dell — scored between D and F.

Maersk was head of the class among carriers, earning a B grade with its commitment to carbon neutrality by 2040 with strong interim targets. Ship It Zero noted that Maersk was the only carrier with a 2040 net-zero target. Carriers scoring an F on the decarbonization report card were Evergreen, Hapag-Lloyd, Yang Ming and Pacific International Lines that provided “no clear pathway to decarbonization.”

“Most carriers have only committed to carbon neutrality by 2050, too long a timeframe to avoid catastrophe, and carriers are reliant on false solutions like LNG and scrubbers,” the report said. “While development of alternative low-emissions fuels is increasing, far more is needed to replace new dirty ships on the global order book.”

The container shipping order book is approaching 30% of the active fleet, with 59% of the orders for conventional fossil fuel vessels. However, LNG-powered ships now comprise 30% of the order book, with around 12% of orders for methanol-capable vessels, according to Sea-web, a sister company of the Journal of Commerce within S&P Global.

Container lines invest in alternative fuel ships, but traditional bunkers dominate

Global TEU capacity of container ships on order capable of running on methanol, liquefied natural gas (LNG), and traditional marine fuel



Source: S&P Global

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The World Shipping Council (WSC) agreed there remained much work to be done to decarbonize the industry, but a spokesperson told the Journal of Commerce that carriers have already invested in ships capable of running on renewable fuel. There are more vessels capable of operating on near-zero e-fuels on order than the combined orderbooks for all other vessel types, she added.

“Partnerships between carriers and their customers are important to creating demand for near-zero fuels, but in addition to that we need clear technical and economic regulations from the International Maritime Organization [IMO] to send a signal to the energy sector to invest in the production and distribution of near-zero fuels,” the spokesperson said.

“The WSC is actively engaged at IMO to make that happen,” she added. “There is still much to be done, and we look forward to continuing our work with customers and all parties in the maritime supply chain to decarbonize quickly and efficiently.”

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

Further contraction expected in global freight forwarding

After falling 3.7% in real terms (holding prices and exchange rates constant) last year, the global forwarding market is expected to contract a further 3.9% by the end of the year, reducing its market value to just over €334.3bn (\$424.6bn).

Research analyst Transport Intelligence (Ti) notes, in its recent report, Global Freight Forwarding Market Size & Forecasting 2022-2027, that the “cautious optimism in early 2023 that the world economy could achieve a soft landing has receded amid continued high inflation”

It adds: “According to the IMF, risks to the outlook are heavily skewed to the downside, with the chances of a hard landing having risen sharply.

Air, specifically, is forecast to decline by 4.7% in real terms this year, after falling 7.3% in 2022, with a market value of almost €125.6bn. Several factors continue to impact performance, says the report, including war in Ukraine, high inflation and fuel prices. In addition, air freight’s competitive advantage over sea has ended as prices there have rapidly declined and congestion has eased.

According to IATA figures this year, measures by governments to combat inflation by cooling economies are expected to result in a further decline in cargo volumes this year of 5.6% on 2019 and 4% below last year.

The sea freight forwarding market is forecast to contract by 3.5% (-1.5% last year) to a market value of almost €208.8bn.

Ti said: “The market will continue to be affected by depressed consumer behaviour. The very strong supply of vessels combined with mediocre, or even falling, demand, as well as resolved port congestion, point to a downward trajectory for freight rates.”

It added that a major factor weighing on demand for both air and sea freight forwarding services was that the inventory to sales ratio was currently at historically high levels.

“In periods of low inventory, air freight benefits disproportionately as shippers seek to rapidly move stock into the right locations and replenish stores to match supply with demand,” the report says.

Looking further ahead, Ti notes that taking into account that the global economy is forecast to experience a prolonged period of subpar growth, the global freight forwarding market is expected to reach a market value of just over €377.2bn in 2027, based on a CAGR (compound annual growth rate) of 1.6%. The air and sea freight forwarding markets are projected to expand at a CAGR of 1.7% and 1.6% respectively.

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

Rising demand and slow steaming a win-win for container lessors

Container leasing companies reported a slowdown in the return of boxes by ocean carrier customers in the second quarter, and say they are optimistic of a recovery in demand for equipment in the second half of the year.

Furthermore, the lessors stand to benefit from the 1.2m teu of newbuild tonnage stemmed for delivery before the end of the year, necessitating super-slow steaming, longer turnarounds for containers and a consequential requirement for upgrades in carrier equipment fleets.

Collectively, ocean carriers lease around 50% of the 54m containers they use on tradelanes around the world, so lessors are at the sharp end of supply and demand variations.

In fact, the top two lessors, Triton and Textainer, who between them have a market share of 41%, are both bullish on the outlook for H2.

“While market conditions in the second quarter remained slow overall, drop-off volumes decreased from the first quarter level and we experienced some pockets of demand,” said the CEO of Triton, Brian Sondey.

And a positive outlook for the liner industry – and thus for container leasing – was also the theme of Textainer’s Q2 earnings call on Tuesday.

Olivier Ghesquiere, its president and CEO, went further on what the company saw in terms of “higher ship loading”, as well as a “firming up of ocean rates on major shipping routes”.

He said: “There is growing optimism that August will see further ocean freight rate hikes, especially on the transpacific routes where ship utilisation has recently been much stronger.

“Our customers also expect inventory destocking in the US to come to an end, paving the way for the need to replenish inventory ahead of the winter holiday season. As such, our shipping line customers anticipate cargo volume to pick up in the second half of the year,” he added.

Then there is the armada of newbuild tonnage being delivered, with a record 300,000 teu of capacity hitting the water during June alone. Mr Ghesquiere views the huge orderbook as a significant positive for the container leasing industry.

“Essentially, they [carriers] are adding ships to their existing routes and, typically, where they were operating 10 or 11 ships on one route, they are adding one or two ships. They are then adding one or two stops along the round trip and slowing down the ships so they consume less fuel.

“The big benefit for us is that, essentially, if there are more ships in service and they’re sailing slower, it means it takes longer for the containers to move around, which means more containers are actually needed, and that is highly supportive to demand,” explained Mr Ghesquiere.

“I believe that as we recover from the current down cycle, we are going to see the effect of the increased cargo and additional ship capacity, and that is going to translate into demand for more containers over time,” he added.

According to the latest Container Census & Leasing Equipment Forecaster report from Drewry, the substantial fall in liner profitability this year is also likely to increase the demand for leasing equipment as opposed to purchasing containers.

Based on Drewry predictions, the leasing sector is expected to increase its control of the container fleet to over 52% by 2027.

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

ตารางสรุปอัตราค่าระวางจากเอเชียไปเส้นทางต่างๆ อ้างอิงจาก Shanghai Containerized Freight Index (SCFI)

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

Description	Unit	Weighting	Previous Index 28 July 2023	Current Index 4 August 2023
Comprehensive Index			1029.23	1039.32
Service Routes				
Europe (Base port)	USD/TEU	20%	975	947
Mediterranean (Base port)	USD/TEU	10%	1503	1529
USWC (Base port)	USD/FEU	20%	1943	2002
USEC (Base port)	USD/FEU	7.50%	2853	3013
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	839	809
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	318	340
East/West Africa (Lagos)	USD/TEU	2.50%	2637	2572
South Africa (Durban)	USD/TEU	2.50%	1334	1323
South America (Santos)	USD/TEU	5.00%	2513	2451
West Japan (Base port)	USD/TEU	5.00%	326	326
East Japan (Base port)	USD/TEU	5.00%	334	334
Southeast Asia (Singapore)	USD/TEU	7.50%	143	143
Korea (Pusan)	USD/TEU	2.50%	131	165

สรุปรายงานประจำสัปดาห์ พบว่าภาพรวมสถานการณ์ตลาดการขนส่งพื้นตัวต่อเนื่อง ในขณะที่ค่าระวางปรับปรุงในหลายเส้นทาง สำหรับเส้นทางยุโรป ภาพรวมตลาดการขนส่งคงที่ แต่ค่าระวางปรับลดลงจากสัปดาห์ที่แล้ว สำหรับเส้นทางสหรัฐอเมริกา ตลาดการขนส่งขยายตัวต่อเนื่อง ในขณะที่ค่าระวางปรับขึ้นต่อเนื่องเช่นเดียวกัน สำหรับเส้นทางออสเตรเลีย ตลาดการขนส่งทรงตัว ในขณะที่ค่าระวางปรับเพิ่มขึ้นต่อเนื่อง สำหรับเส้นทางอเมริกาใต้ ภาพรวมตลาดการขนส่งซบเซาลง ในขณะที่ค่าระวางปรับลดลงต่อเนื่อง สำหรับเส้นทางญี่ปุ่น ตลาดการขนส่งทรงตัว ในขณะที่ค่าระวางคงที่