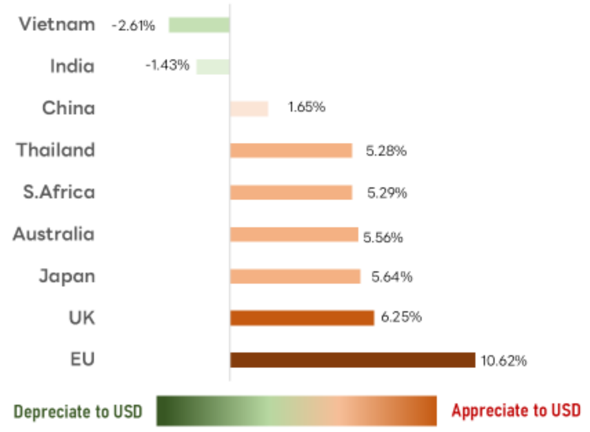
Weekly Briefing (30 July 2025)

Thai Bath Rate
To Foreign Currencies

USD	EUR	GBP	AUD
32.46	37.61	43.32	21.18
CNY	**JPY**	**INR**	**VND**
4.52	0.22	0.38	0.0012

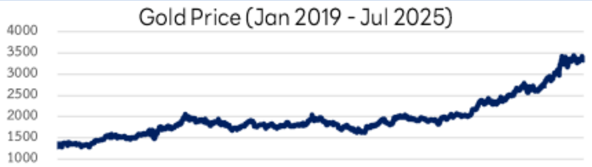
Exchange Rate Trend
To USD (YTD)



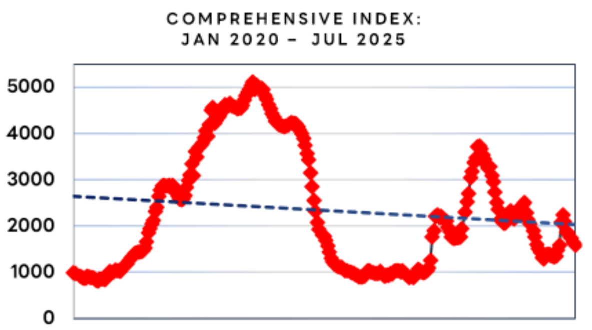
Crude Oil & Gold Price
(20 Jul - 26 Jul 2025)

Oil	OPEC	Brent	WTI
USD/Barrel	68-70	69-72	65-68

Gold : 3336-3432 USD/Ounces



Freight Index
(SCFI Comprehensive Index)



18-Jul-25	25-Jul-25
1,646.90	1,592.59
-54.31	

Weekly Top's Stories

EU and US agree trade deal, with 15% tariffs for European exports to America

รายละเอียดเพิ่มเติม : https://bit.ly/3U2hz44

Tough talk as new trade and tariff deals are agreed round the world

รายละเอียดเพิ่มเติม : https://bit.ly/45gkMSM

Forwarders expect surcharges as ocean spot rates continue to slide

รายละเอียดเพิ่มเติม : https://bit.ly/4lncXAR

Thai National Shippers' Council | สภาผู้ส่งสินค้าทางเรือแห่งประเทศไทย (สภาผู้ส่งออก)

1.https://bit.ly/3U2hz44 2.https://bit.ly/45gkMSM 3.https://bit.ly/4lncXAR

อัพเดทค่าระวางเรือ

และสถานการณ์การขนส่งสินค้าทางทะเล

สัปดาห์ที่ 30 พ.ศ. 2568

สรุปค่าระวางเรือประจำสัปดาห์

"หมายเหตุ: อัตราค่าระวางที่ปรากฏเป็นอัตราฐานของสายเรือที่ประกาศเป็นทางการ ซึ่งอาจสูงกว่าหรือต่ำกว่าอัตราที่มีการเรียกเก็บจริงจากผู้ส่งออก"

CONTAINER ALL IN FREIGHT RATE (DRY)

ROUTE	Freight		Surcharge / Fee			Remark
	USD/20’	USD/40’	Item	USD/20’	USD/40’	
Thailand - Shanghai	70	130	ISOCC	34	69	Effective till 31-JUL-2025
Thailand - Qingdao	180	250				
Thailand - Hong Kong	150	250				
Thailand - Japan (Main Port)	350	600				
Thailand – Kaohsiung	200	300				
Thailand - Klang	250	450	ISOCC	20	40	
Thailand - Jakarta	250	450				
Thailand - Ho Chi Minh (Cat Lai)	100	200				
Thailand - Singapore	200	350				
Thailand - Manila (North & South)	650	950				
	Subject to CIC at destination					
Thailand - Jebel Ali	1,300	1,600	ISOCC	45	90	
			War Risk	35	70	
Thailand - South Korea (Busan)	300	600	All - In			
Thailand - South Korea (Incheon)	350	700				
Thailand - Nhava Sheva	1,000	1,300	ISOCC	51	102	
Thailand – Durban / Cape Town	2,200	3,000	ISOCC	78	156	
			Subject to SCMC USD 30/BL			
Thailand - Melbourne	900-1,000	1,800-2,000	All - In			
Thailand - Sydney						
Thailand – Europe (Main Port) (Rotterdam/Antwerp/Hamburg/ Le Havre)	1,950	3,200	ISOCC	Included		
			LSS	Included		
			EUIS	51 €	102 €	
			Subject to ENS USD 30/BL *20 ft. Weight Surcharge 100-200 USD*			
Thailand - US West Coast	3,800	4,800	All - In			
Thailand - US East Coast (NY/Savannah/Baltimore/Norfolk)	3,000	4,000	New Panama Transit Tariff Surcharge (Up to routes) USD 40-120/TEU			

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

สถานการณ์ค่าระวางในช่วงเดือนกรกฎาคม 2568 ค่าระวางในเส้นทางเอเชียคงที่ในหลายเส้นทาง โดยเส้นทาง Shanghai ค่าระวางคงที่ อยู่ที่ 70 USD/TEU และ 130 USD/FEU เส้นทาง Klang ค่าระวางคงที่ อยู่ที่ 250 USD/TEU และ 450 USD/FEU เส้นทาง Hong Kong ค่าระวางคงที่ อยู่ที่ 150 USD/TEU และ 250 USD/FEU และเส้นทาง Japan ค่าระวางคงที่ อยู่ที่ 350 USD/TEU และ 600 USD/FEU

สำหรับเส้นทาง Durban ค่าระวางเพิ่มขึ้น โดยอยู่ที่ 2,200 USD/TEU และ 3,000 USD/FEU ส่วนเส้นทางเกาหลี ค่าระวางคงที่ โดยอยู่ที่ 300-350 USD/TEU และ 600-700 USD/FEU

ส่วนเส้นทางออสเตรเลีย ค่าระวางคงที่ โดยอยู่ที่ 900-1,000 USD/TEU และ 1,800-2,000 USD/FEU ในขณะที่เส้นทาง Europe ค่าระวางในครึ่งเดือนหลัง ค่าระวางลดลง โดยอยู่ที่ 1,950 USD/TEU และ 3,200 USD/FEU

ส่วนเส้นทางสหรัฐอเมริกา ค่าระวางในครึ่งเดือนหลัง ค่าระวางฝั่ง West Coast ลดลง โดยอยู่ที่ 3,800 USD/TEU และ 4,800 USD/FEU ในขณะที่ค่าระวางฝั่ง East Coast ลดลง โดยอยู่ที่ 3,000 USD/TEU และ 4,000 USD/FEU

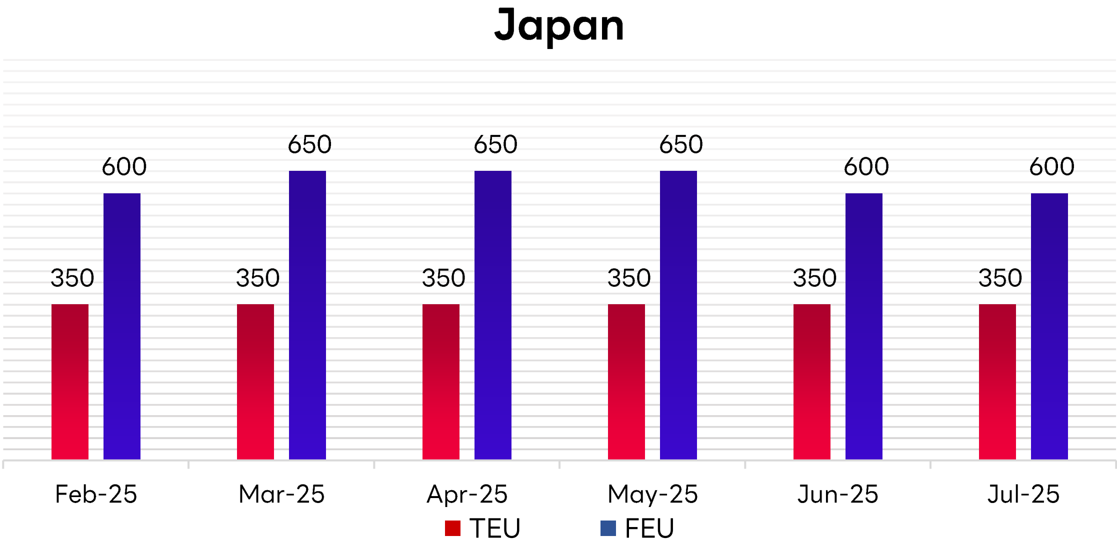
อัตราค่าระวางสัปดาห์ที่ 30/2568

วันที่ 20 กรกฎาคม 2568 – 26 กรกฎาคม 2568

CONTAINER FREIGHT RATE (REEFER)

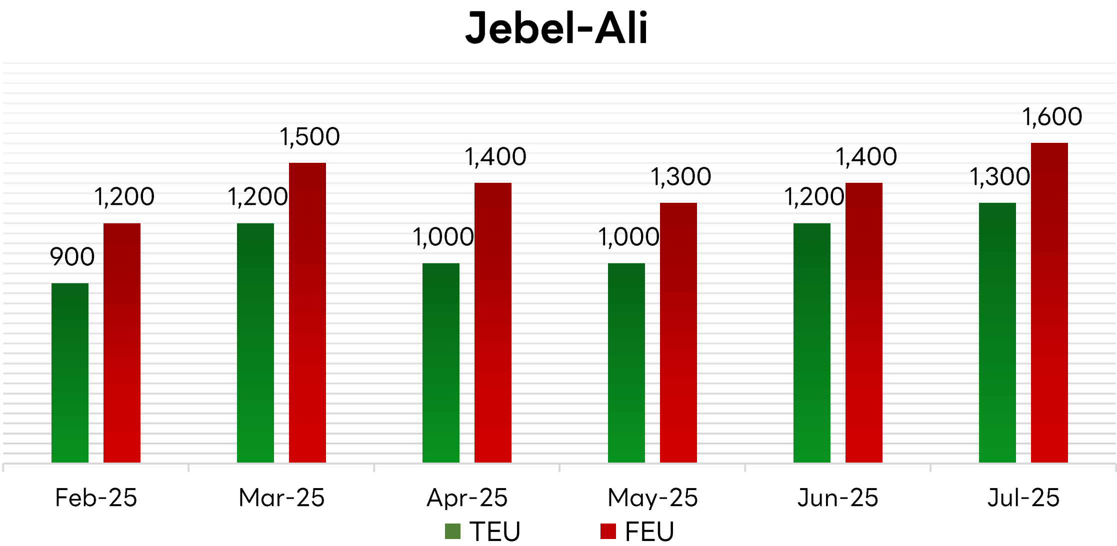
<table>
<tr><th rowspan="2">ROUTE</th><th colspan="2">SIZE</th><th rowspan="2">Bunker Surcharge / Low Sulphur Surcharge</th><th rowspan="2">Remark</th></tr>
<tr><th>USD/20’</th><th>USD/40’</th></tr>
<tr><td>Thailand-Hong Kong</td><td rowspan="2">600</td><td rowspan="2">800</td><td rowspan="2">All-in</td><td rowspan="4">Effective till 31-JUL-2025</td></tr>
<tr><td>Thailand-Shanghai</td></tr>
<tr><td>Thailand-Japan (Tokyo, Yokohama)</td><td>1,000</td><td>1,200</td><td>All-in</td></tr>
<tr><td>Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)</td><td>4,000</td><td>4,500</td><td>All-in</td></tr>
</table>

กราฟเปรียบเทียบอัตราค่าระวางเรือ ตู้ 20 และ 40 ฟุต ในเส้นทาง ไทย-ญี่ปุ่น 6 เดือนล่าสุด



	FEB-25	MAR-25	APR-25	MAY-25	JUN-25	JUL-25
Low Sulphur Surcharge / TEU	46	46	34	23	23	34
Low Sulphur Surcharge / FEU	92	92	69	46	46	69

กราฟเปรียบเทียบอัตราค่าระวางเรือ ตู้ 20 และ 40 ฟุต ในเส้นทาง ไทย-Jebel Ali 6 เดือนล่าสุด

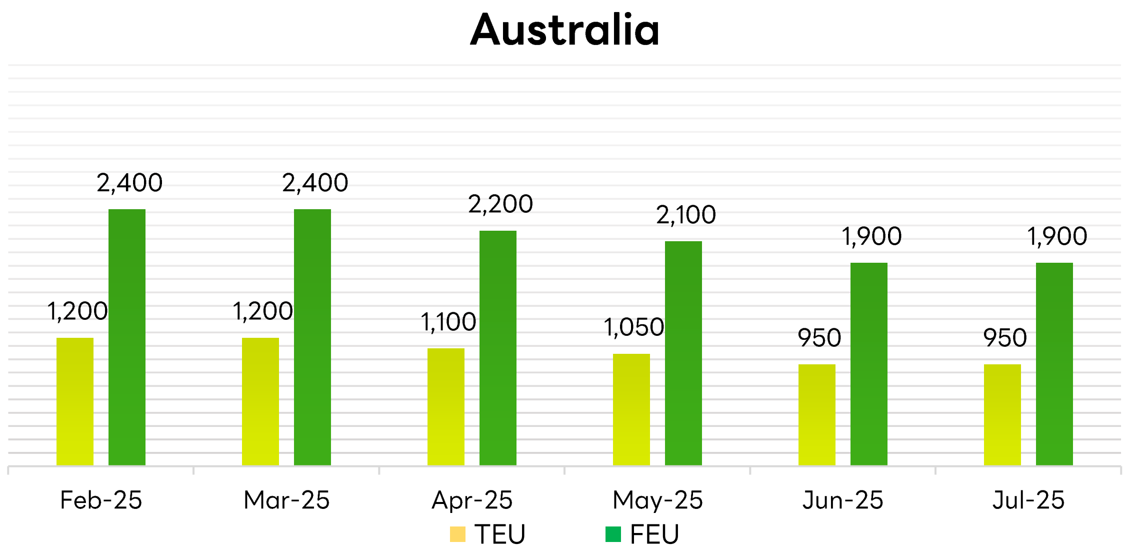


	FEB-25	MAR-25	APR-25	MAY-25	JUN-25	JUL-25
Low Sulphur Surcharge / TEU	45	45	45	22	34	45
Low Sulphur Surcharge / FEU	90	90	90	44	68	90

War Risk Surcharge: USD35/TEU และ USD70/FEU

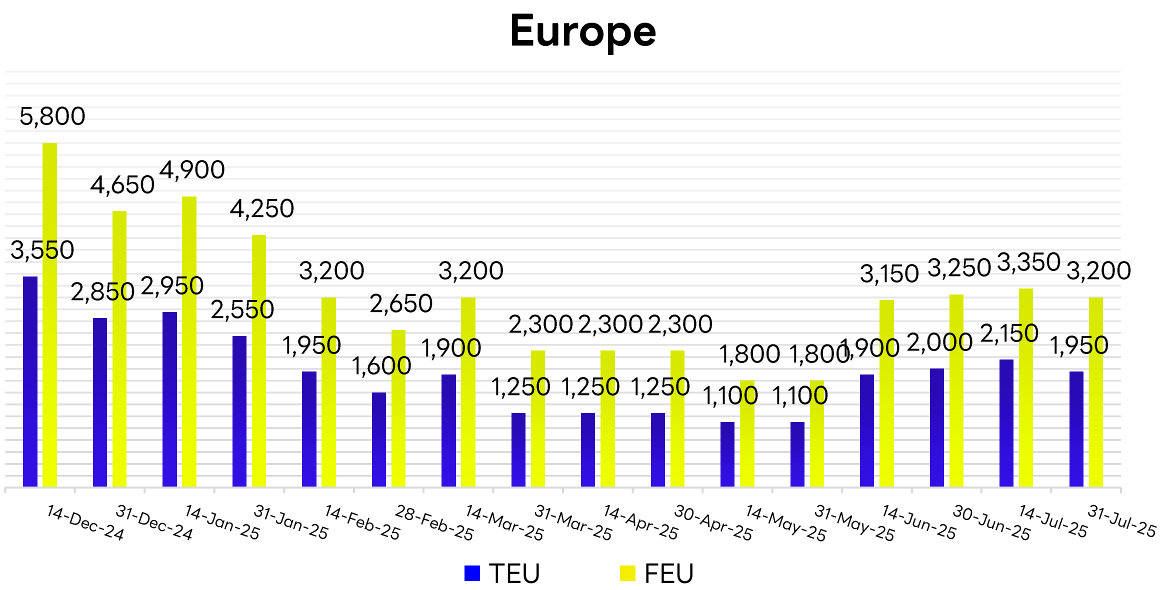
กราฟเปรียบเทียบอัตราค่าระวางเรือ ตู้ 20 และ 40 ฟุต

ในเส้นทาง ไทย-Australia 6 เดือนล่าสุด



กราฟเปรียบเทียบอัตราค่าระวางเรือ ตู้ 20 และ 40 ฟุต

ในเส้นทาง ไทย-ยุโรป 8 เดือนล่าสุด

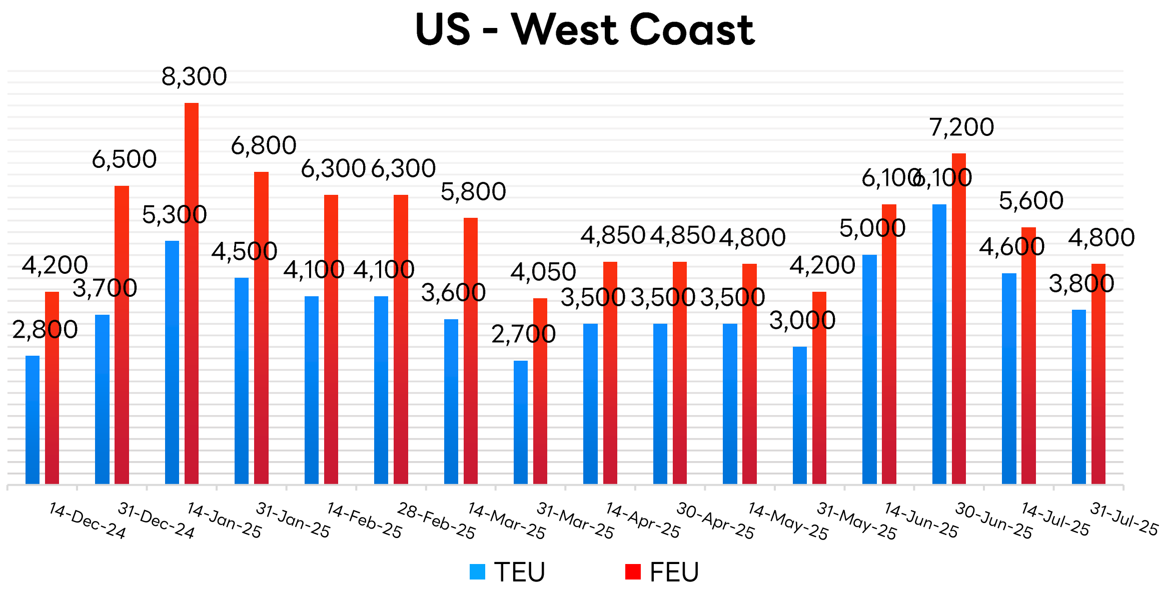


	FEB-25	MAR-25	APR-25	MAY-25	JUN-25	JUL-25
Low Sulphur Surcharge / TEU	71	71	71	53	53	Inc
Low Sulphur Surcharge / FEU	142	142	142	106	106	Inc
EU Innovation Surcharge / TEU	51 €	51 €	51 €	51 €	51 €	51 €
EU Innovation Surcharge / FEU	102 €	102 €	102 €	102 €	102 €	102 €

Subject to ENS USD 30/BL, 20 ft. Weight Surcharge 100-200 USD

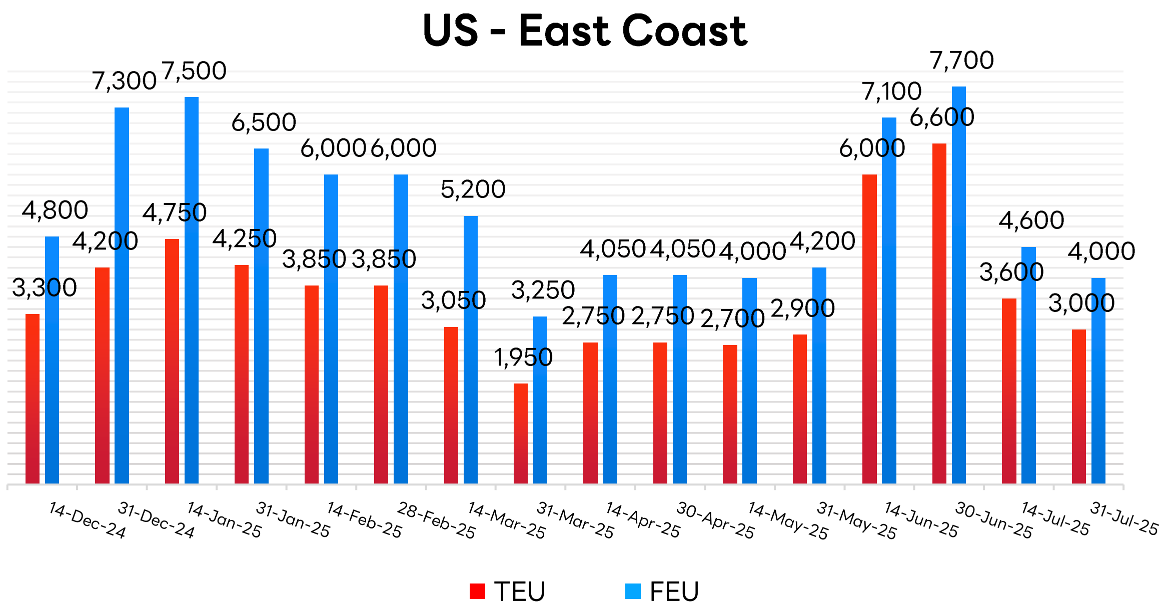
กราฟเปรียบเทียบอัตราค่าระวางเรือ ตู้ 20 และ 40 ฟุต

ในเส้นทาง ไทย-สหรัฐอเมริกา West Coast 8 เดือนล่าสุด



กราฟเปรียบเทียบอัตราค่าระวางเรือ ตู้ 20 และ 40 ฟุต

ในเส้นทาง ไทย-สหรัฐอเมริกา East Coast 8 เดือนล่าสุด



New Panama Transit Tariff Surcharge (Up to routes) USD 40-120/TEU

US shippers without full supply chain visibility are 'just asking for problems'

Question marks linger over long-term implications on global trade stemming from the Trump administration's tariff policy, but there is mounting consensus that it has proved supply chain visibility is no longer a "nice to have", but is now a necessity.

Testifying to this, consider the decision of the US Federal Court of International Trade, which earlier this month slapped a $3.4m fine on an importer after purported efforts to evade duties by misclassifying Chinese goods as having Thai origin.

Granting a motion for default judgement against Rayson Global – which did not answer the complaint – the court concurred with government claims that "false statements of country of origin occurred as a result of defendants' negligence when causing the importations".

Responding to the news on LinkedIn, the director of customs and trade services at DSV warned importers that if they were not "absolutely certain something coming from South-east Asia isn't actually made in China, you're just asking for problems".

Adding that this incident showed a need to "get your house in order", Mr Mentos's post prompted a wave of response, including from Airbus-affiliated export control expert Olu-Kayodé Karim Amadou, who claimed full supply chain full visibility was now "not negotiable".

While this case relates to incidents preceding the return of Donald Trump to the White House, the response builds on concerns increasingly expressed to The Loadstar that his tariff policy has thrust the complexity of global supply chains into the spotlight.

Product information management platform Pimberly's CEO and co-founder, Martin Balaam, told The Loadstar a business's position within a supply chain determined the level of risk the tariffs exposed it to, with those importing finished products largely safe.

Mr Balaam said the same could not be said for US manufacturing and its dependence on parts from "further down the supply chain"; its level of granularity meaning that many manufacturers "are having to look at theirs and ask, 'where's the impact?'".

He added: "It has shone a light on manufacturers and left them to work out if they actually know where all their products are coming from, because it could be that the impact is hitting them two or three suppliers down the supply chain."

Part of the problem, Mr Balaam continued, was that because of global supply chains' granular nature, many manufacturers simply cannot say where every element of their product originated – in large part because it was a level of detail they had never needed.

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

Wave of Asian boxes to hit congested North Europe ports in August–September

Shippers in North Europe are being warned to expect further delays and disrupted services during August and September when a wave of inbound containers from Asia arrive at already-congested gateway ports.

Strong import demand in Europe over the past few months has kept ships full and volume growing in double digits; that demand is expected to continue through the third quarter, piling more pressure on the overstretched terminals.

"The peak will be August and September, and we also expect a peak in congestion until it gets better in the fourth quarter," said Michael Amri, global sea freight business development manager at Hellmann Worldwide Logistics.

Hutchison Port Holdings Trust, the Singapore-listed port operator that controls Hutchison's Hong Kong and mainland China port interests, said China's exports to Europe in the second half of the year are set to continue the double-digit growth seen in the first half.

"Growth in China's exports to the European Union is expected to follow the same trajectory as seen in the first half of 2025, with exports to the EU in Q2 growing by 13% year on year," the port operator said.

Should the double-digit growth in volume materialize, the combined volume arriving in North Europe in August and September will top 2 million TEUs.

"In terms of seasonality, July is typically the month wherein the most cargo is loaded from Far East to Europe, which means arrival into European ports in August and September," Lars Jensen, CEO of Vespucci Maritime and a Journal of Commerce analyst, wrote in a LinkedIn post this week.

"The lack of progress in removing port congestion in Europe is worrying seen in the light of this coming peak load of cargo," Jensen added.

North Europe's gateway terminals have been struggling to get on top of often severe congestion for much of the year, with ships arriving outside scheduled windows causing berthing delays and full container yards delaying the offloading of cargo.

Terminals heading for 'code red' summer

Stefan Verberckmoes, senior shipping analyst at Alphaliner, said he was not optimistic that congestion would improve over the summer months, which was shaping up to be a "hot summer with code red for European container terminals."

Verberckmoes said most of the ports in North Europe that had reserve capacity were now fully operational, with the main problem at terminals being the long dwell times caused by late vessel arrivals.

"The fact that some carriers compete by granting longer free time [for containers] of course only makes the problem of the terminal operators worse," he said.

A spokesperson for Hapag-Lloyd said none of its hub terminals in Europe were congested at the moment but acknowledged there could be knock-on effects in the coming months.

Still, Destine Ozuygur, chief analyst at ocean visibility provider eeSea, said she did not see an imminent congestion crisis across North Europe and emphasized that not all terminals were affected.

"London Gateway has been the most extreme, followed by Antwerp, then Hamburg and then Rotterdam," Ozuygur told the Journal of Commerce.

"While vessels and services are being impacted, it hasn't put turnover across Europe in a chokehold," she added. "Even a port like Rotterdam that has seen stubborn congestion is reporting healthy throughput in Q2 and has seen steady reliability improvement since January."

Ozuygur outlined the factors contributing to the persistent congestion in North Europe for much of the year. Ongoing vessel diversions around southern Africa have necessitated the deployment of larger-capacity vessels, she noted, which leads to longer berth stays and higher yard utilization. The longer transit times have also left room for more volatility and unpredictable delays.

Schedule reliability data from eeSea, in which ships are considered late if they arrive one calendar day or more after the scheduled time, shows Asia-North Europe on-time performance falling from 42% in May to 29% in July.

Asia-North Europe/Mediterranean schedule reliability falls steeply through July

Monthly on-time performance percentages of container ships on Asia-North Europe and Mediterranean, with ships considered late if they arrive one calendar day or more after the scheduled time.

On the land side, Ozuygur said some ports, such as Antwerp and Hamburg, are impacted by both high yard density and major barge delays. One of the major causes of the barge delays has been low water levels in European waterways that cause capacity restrictions.

Cutting transshipment moves

Ozuygur said carriers had the most flexibility in dealing with port congestion as they could use port swaps and port omissions or adjust their rotations to avoid bottlenecks.

The Gemini Cooperation of Maersk and Hapag-Lloyd recently extended an Asia-Europe service to Denmark and Sweden, removing transshipment volume from Rotterdam and lowering overall container moves. Instead of unloading boxes in Rotterdam and transferring to a feeder ship to Aarhus in Denmark and Gothenburg in Sweden, a direct call at the ports turned three container moves into one.

Mediterranean Shipping Co. is also sailing direct from Ecuador to St. Petersburg to avoid transshipment in the Benelux ports.

Eirik Hooper, senior associate in Drewry Ports and Terminals research team, said in the Hamburg to Le Havre range there would likely be moves away from the most congested terminals to less busy terminals in the same ports, or to less heavily utilised ports such as Le Havre, Zeebrugge, Bremerhaven and Wilhelmshaven.

“While this is especially an option for the hybrid operators who control multiple terminals in that range, the carriers do prefer to use those terminals with the quay cranes, yard equipment and berths designed for the bigger vessels on the Asia-Europe loops,” he told the Journal of Commerce.

Another option to ease congestion is carriers transferring containers from the overloaded deep-sea terminals into inland depots to reduce dwell times and free up space in yards that are full.

But Hooper noted that the available inland terminal capacity was limited and with the current low water levels on the Rhine constraining the ability of barges to move fully laden, “this is not likely to solve the immediate problem.”

“As such, we view an increase in the current congestion issues as the most likely outcome for the remainder of the summer,” he added.

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

Trans-Atlantic trade dispute averted as US, EU reach weekend deal

The 15% tariff deal agreed Sunday between President Donald Trump and European Commission President Ursula von der Leyen brings an end to months of increasingly fractious negotiations between Washington and Brussels.

While still a significant jump from current US tariffs of about 4.8%, the agreement averts a destructive trans-Atlantic trade war that had the EU facing 30% tariffs from Aug. 1 and preparing to launch its own wide-ranging retaliatory tariffs against the US.

“We have stabilized on a single 15% tariff rate for the vast majority of EU exports,” von der Leyen said in a statement following a meeting with Trump at his Turnberry golf resort in western Scotland.

“This rate applies across most sectors, including cars, semiconductors and pharmaceuticals,” she added. “This 15% is a clear ceiling. No stacking. All-inclusive.”

The deal also set “zero-for-zero” tariffs on several strategic products, including all aircraft and component parts, certain chemicals, certain generics, semiconductor equipment, certain agricultural products, natural resources and critical raw materials.

Many details in the framework agreement still need to be thrashed out between the two parties over the coming weeks, doing little to address the uncertainty that has hung over the trade lane for months.

“All in all, this means the 15% tariff will be on most products, but importers would need to keep a close eye out for information on their specific commodities once details become known,” Lars Jensen, CEO of Vespucci Maritime and a Journal of Commerce analyst, wrote in a LinkedIn post Monday.

‘Immediate tariff relief’

No agreement was reached on the US tariffs on steel and aluminium and related products that are currently at 50%, although von der Leyen said “to reduce barriers between us, tariffs will be cut, and a quota system will be put in place.”

“This deal provides a framework from which we will further reduce tariffs on more products, address non-tariff barriers, and cooperate on economic security,” she said.

“In these turbulent times, this is necessary for our companies to be able to plan and invest,” she added. “We are ensuring immediate tariff relief. This will have a clear impact on the bottom lines of our companies … we are securing access to our largest export market. At the same time, we will give better access for American products in our market.”

The US was the recipient of 20.6% of total European exports in 2024 and is the EU’s second-largest partner for the import of goods with a share of 13.7%. China is the EU’s largest import trading partner.

Spot rates on the North Europe to US East Coast trade lane have remained relatively flat since Trump’s 90-day pause on the tariffs was announced on April 9 and extended to Aug. 1, with shippers on the trans-Atlantic showing little appetite for frontloading exports to the US.

Rates from North Europe to the US East Coast were assessed at $1,600 per FEU at the end of last week, down $300 since May 2, according to Platts, a sister company of the Journal of Commerce within S&P Global.

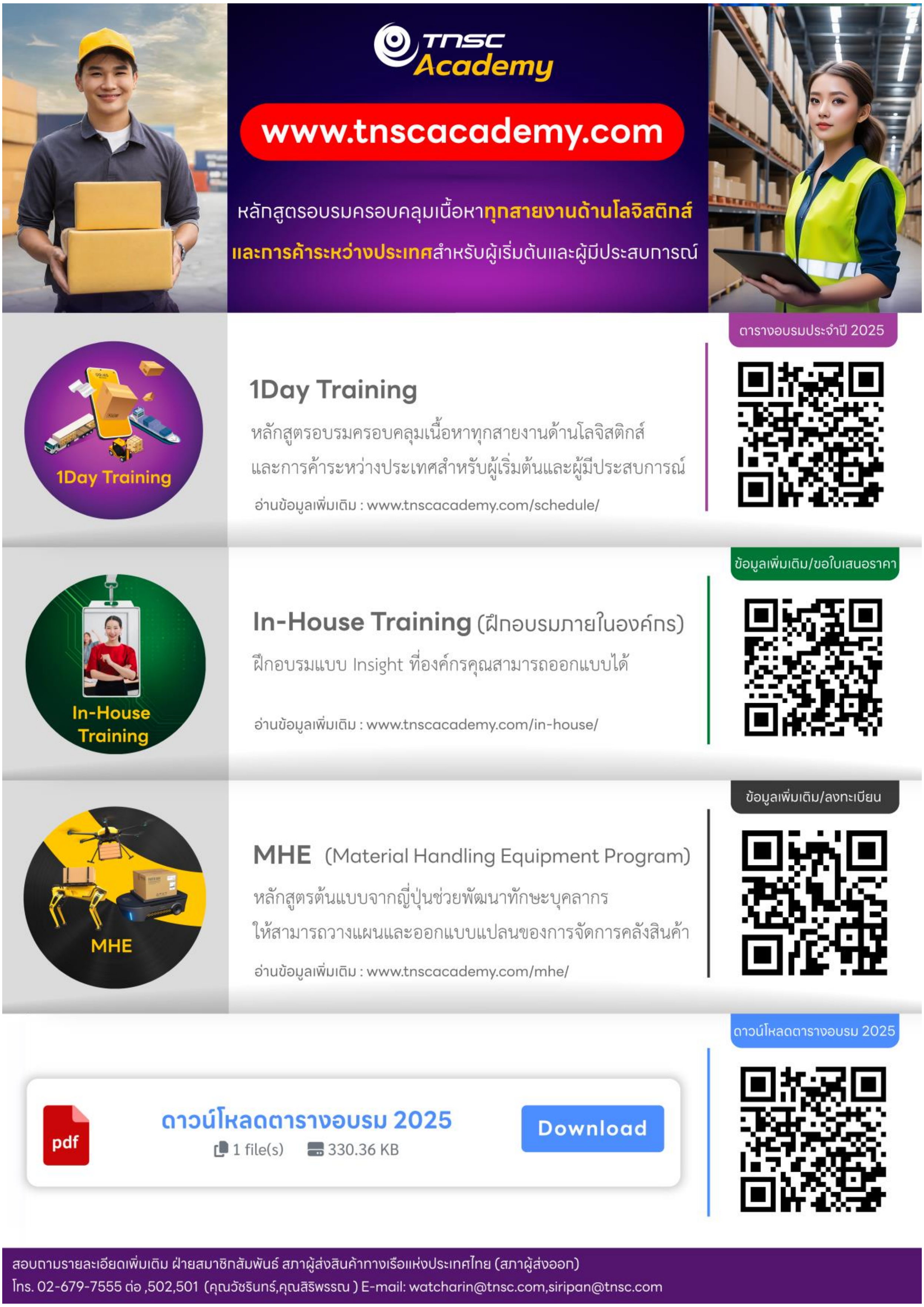
Source: https://www.joc.com/

ตารางสรุปอัตราค่าระวางจากเอเชียไปเส้นทางต่างๆ อ้างอิงจาก Shanghai Containerized Freight Index (SCFI)

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

Description	Unit	Weighting	Previous Index 18 July 2025	Current Index 25 July 2025
Comprehensive Index			1646.9	1592.59
Service Routes				
Europe (Base port)	USD/TEU	20%	2079	2090
Mediterranean (Base port)	USD/TEU	10%	2528	2418
USWC (Base port)	USD/FEU	20%	2142	2067
USEC (Base port)	USD/FEU	7.50%	3612	3378
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	1321	1152
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	1042	1071
East/West Africa (Lagos)	USD/TEU	2.50%	4312	4273
South Africa (Durban)	USD/TEU	2.50%	2851	2961
South America (Santos)	USD/TEU	5.00%	5628	5188
West Japan (Base port)	USD/TEU	5.00%	313	315
East Japan (Base port)	USD/TEU	5.00%	322	324
Southeast Asia (Singapore)	USD/TEU	7.50%	442	429
Korea (Pusan)	USD/TEU	2.50%	136	135


TNSC 30th Anniversary
ZUPPORTS
สมัครใช้งานได้ฟรีวันนี้
เพียงสแกน QR code (จำนวนจำกัด)
เปรียบเทียบ
และจอง Freight
ครบจบในที่เดียว
เปรียบเทียบราคาแบบเรียลไทม์
ครอบคลุมกว่า 60 ท่าเรือทั่วโลก
ใช้ได้ทั้งแบบ FCL และ LCL
ใช้งานฟรี! เพียงจอง Freight อย่างน้อย 1 ครั้งในทุกๆ 3 เดือน
Freight Rate Management
สแกนใช้งาน ฟรี
bitly
สมาชิก TNSC รับสิทธิประโยชน์สุดคุ้ม เพียงสแกน QR Code แล้วมาพบกับ Demo
ระบบ ZUPPORTS ที่ช่วยให้การจัดการง่ายขึ้น พร้อมกรณีศึกษา พบกัน 9 มกราคมนี้


TNSC Academy
www.tnscacademy.com
หลักสูตรอบรมครอบคลุมเนื้อหาทุกสายงานด้านโลจิสติกส์
และการค้าระหว่างประเทศสำหรับผู้เริ่มต้นและผู้มีประสบการณ์
ตารางอบรมประจำปี 2025
1Day Training
1Day Training
หลักสูตรอบรมครอบคลุมเนื้อหาทุกสายงานด้านโลจิสติกส์
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