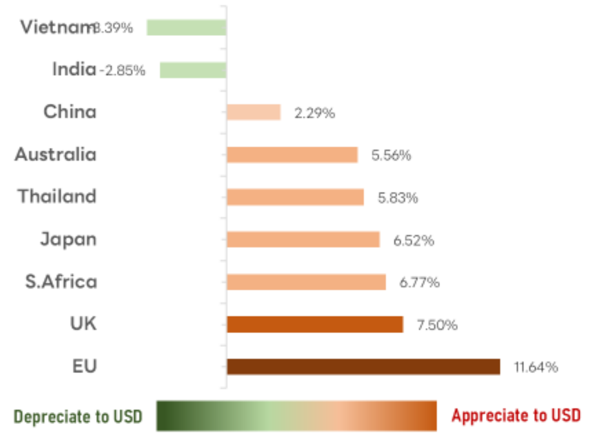
Weekly Briefing (2 September 2025)

Thai Bath Rate
To Foreign Currencies

USD	EUR	GBP	AUD
32.52	37.88	43.84	21.01

CNY	JPY	INR	VND
4.52	0.22	0.37	0.0012

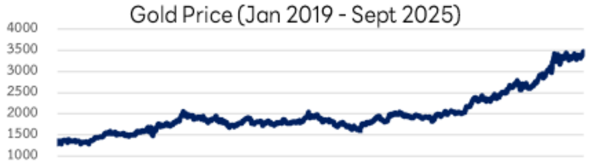
Exchange Rate Trend
To USD (YTD)



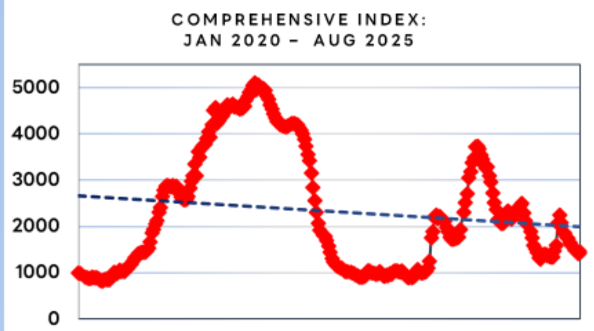
Crude Oil & Gold Price
(24 Aug - 30 Aug 2025)

Oil	OPEC	Brent	WTI
USD/Barrel	67-69	69-71	63-65

Gold : 3368-3448 USD/Ounces



Freight Index
(SCFI Comprehensive Index)



22-Aug-25	29-Aug-25
1,415.36	1,445.06
29.70	

Weekly Top's Stories

Euro zone manufacturing expanded for first time since early 2022 in August

รายละเอียดเพิ่มเติม : https://bit.ly/465fDNT

Zim signals changes to Med network amid apparent Turkish port ban

รายละเอียดเพิ่มเติม : https://bit.ly/428d8c8

Shippers should expect last-minute blanked sailings as Golden Week looms

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

Thai National Shippers' Council สภาผู้ส่งสินค้าทางเรือแห่งประเทศไทย (สภาผู้ส่งออก)

1.https://bit.ly/465fDNT 2.https://bit.ly/428d8c8 3.https://bit.ly/4mQTtpO

อัพเดทค่าระวางเรือ
และสถานการณ์การขนส่งสินค้าทางทะเล
สัปดาห์ที่ 35 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	50	60	ISOCC	46	92	Effective till 30-SEP-2025
Thailand - Qingdao	130	200				
Thailand - Hong Kong	150	250				
Thailand - Japan (Main Port)	300	500				
Thailand – Kaohsiung	150	250				
Thailand - Klang	150	300	ISOCC	27	53	
Thailand - Jakarta	200	400				
Thailand - Ho Chi Minh (Cat Lai)	100	200				
Thailand - Singapore	180	300				
Thailand - Manila (North & South)	550	900				
	Subject to CIC at destination					
Thailand - Jebel Ali	1,150	1,500	ISOCC	56	112	
			War Risk	35	70	
Thailand - South Korea (Busan)	250	500	All - In			
Thailand - South Korea (Incheon)	300	600				
Thailand - Nhava Sheva	900	1,200	ISOCC	64	128	
Thailand – Durban / Cape Town	2,600	3,700	ISOCC	98	196	
			Subject to SCMC USD 30/BL			
Thailand - Melbourne	850-950	1,700-1,900	All - In			
Thailand - Sydney						
Thailand – Europe (Main Port) (Rotterdam/Antwerp/Hamburg/ Le Havre)	1,400	2,300	ISOCC	Included		Effective till 14-SEP-2025
			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)	2,800	3,900	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

สถานการณ์ค่าระวางในช่วงเดือนกันยายน 2568 ค่าระวางในเส้นทางเอเชียลดลงในหลายเส้นทาง โดยเส้นทาง Shanghai ค่าระวางลดลง อยู่ที่ 50 USD/TEU และ 60 USD/FEU เส้นทาง Klang ค่าระวางลดลง อยู่ที่ 150 USD/TEU และ 300 USD/FEU เส้นทาง Hong Kong ค่าระวางคงที่ อยู่ที่ 150 USD/TEU และ 250 USD/FEU และเส้นทาง Japan ค่าระวางลดลง อยู่ที่ 300 USD/TEU และ 500 USD/FEU

สำหรับเส้นทาง Durban ค่าระวางเพิ่มขึ้น โดยอยู่ที่ 2,600 USD/TEU และ 3,700 USD/FEU ส่วนเส้นทางเกาหลี ค่าระวางลดลง โดยอยู่ที่ 250-300 USD/TEU และ 500-600 USD/FEU

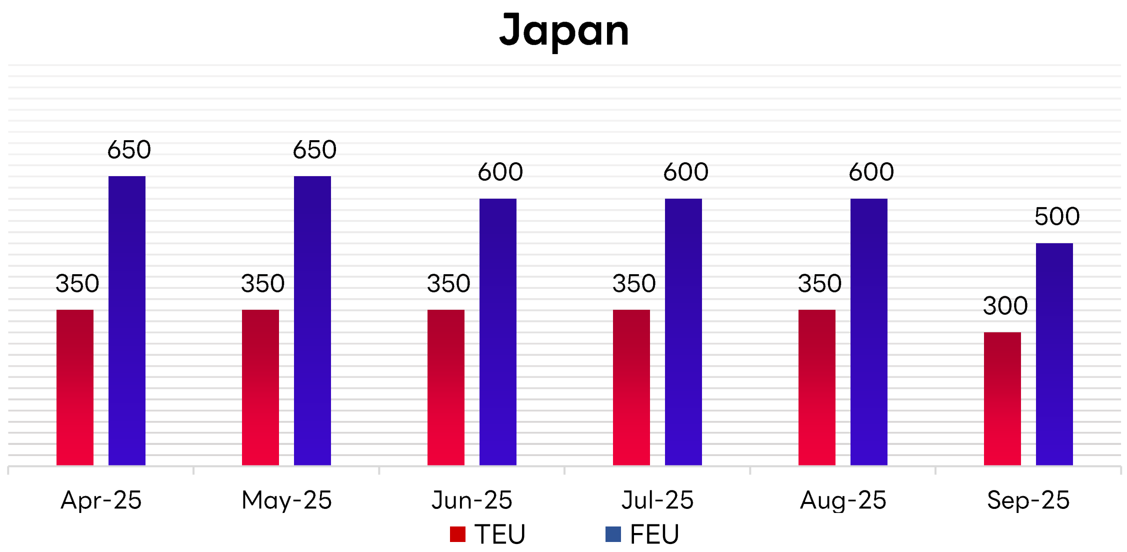
ส่วนเส้นทางออสเตรเลีย ค่าระวางคงที่ โดยอยู่ที่ 850-950 USD/TEU และ 1,700-1,900 USD/FEU ในขณะที่ เส้นทาง Europe ค่าระวางในครึ่งเดือนแรก ค่าระวางลดลง โดยอยู่ที่ 1,400 USD/TEU และ 2,300 USD/FEU

ส่วนเส้นทางสหรัฐอเมริกา ค่าระวางในครึ่งเดือนแรก ค่าระวางฝั่ง West Coast เพิ่มขึ้น โดยอยู่ที่ 3,800 USD/TEU และ 4,800 USD/FEU ในขณะที่ค่าระวางฝั่ง East Coast ลดลง โดยอยู่ที่ 2,800 USD/TEU และ 3,900 USD/FEU

CONTAINER FREIGHT RATE (REEFER)

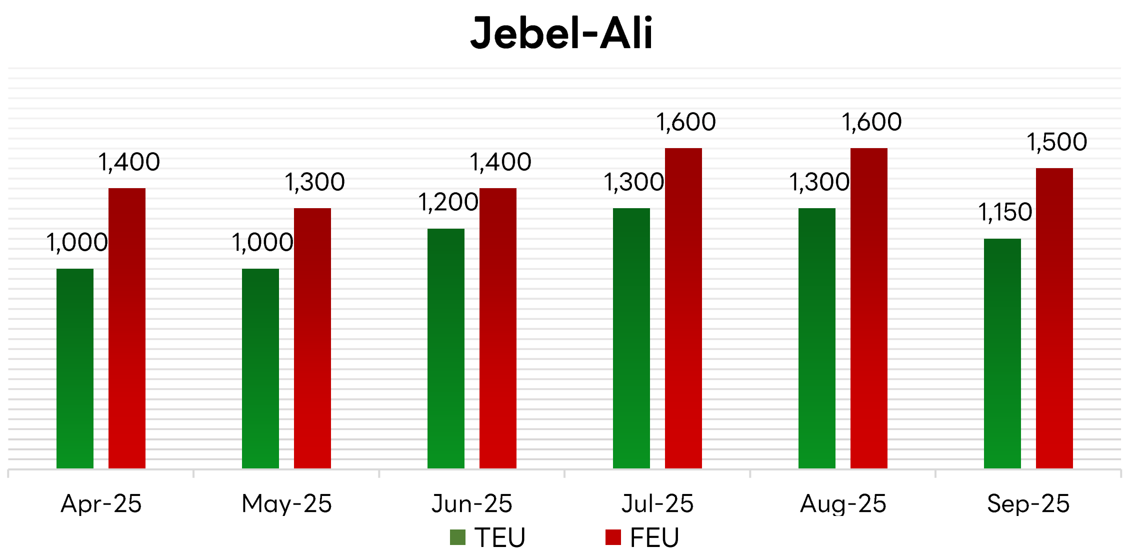
<table>
<tr><th rowspan="2">ROUTE</th><th colspan="2">SIZE</th><th rowspan="2">Bunker Surcharge / Low Sulphur Surcharge</th><th rowspan="2">Remark</th></tr>
<tr><th>USD/20’</th><th>USD/40’</th></tr>
<tr><td>Thailand-Hong Kong</td><td rowspan="2">500</td><td rowspan="2">700</td><td rowspan="2">All-in</td><td rowspan="5">Effective till 30-SEP-2025</td></tr>
<tr><td>Thailand-Shanghai</td></tr>
<tr><td>Thailand-Japan (Tokyo, Yokohama)</td><td>900</td><td>1,150</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



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

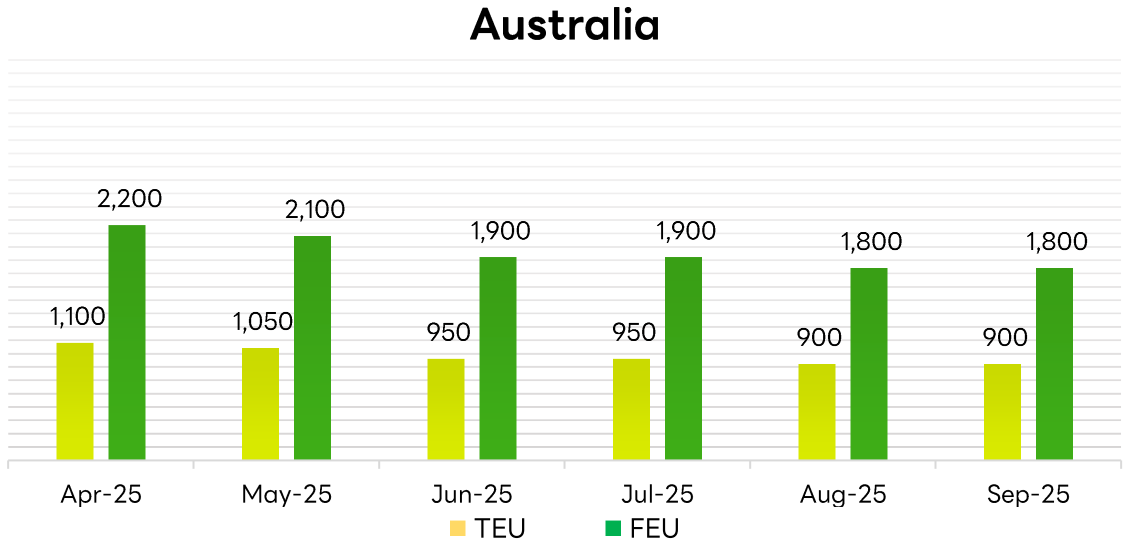
กราฟเปรียบเทียบอัตราค่าระวางเรือ ตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-Jebel Ali 6 เดือนล่าสุด



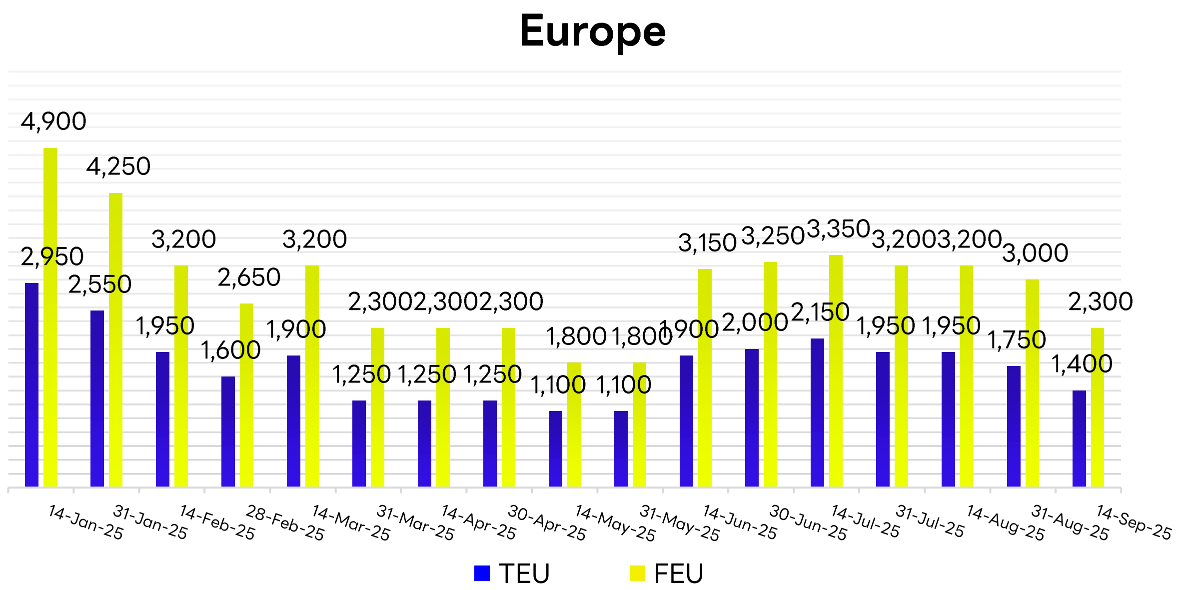
	APR-25	MAY-25	JUN-25	JUL-25	AUG-25	SEP-25
Low Sulphur Surcharge / TEU	45	22	34	45	34	56
Low Sulphur Surcharge / FEU	90	44	68	90	68	112

War Risk Surcharge: USD35/TEU และ USD70/FEU

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



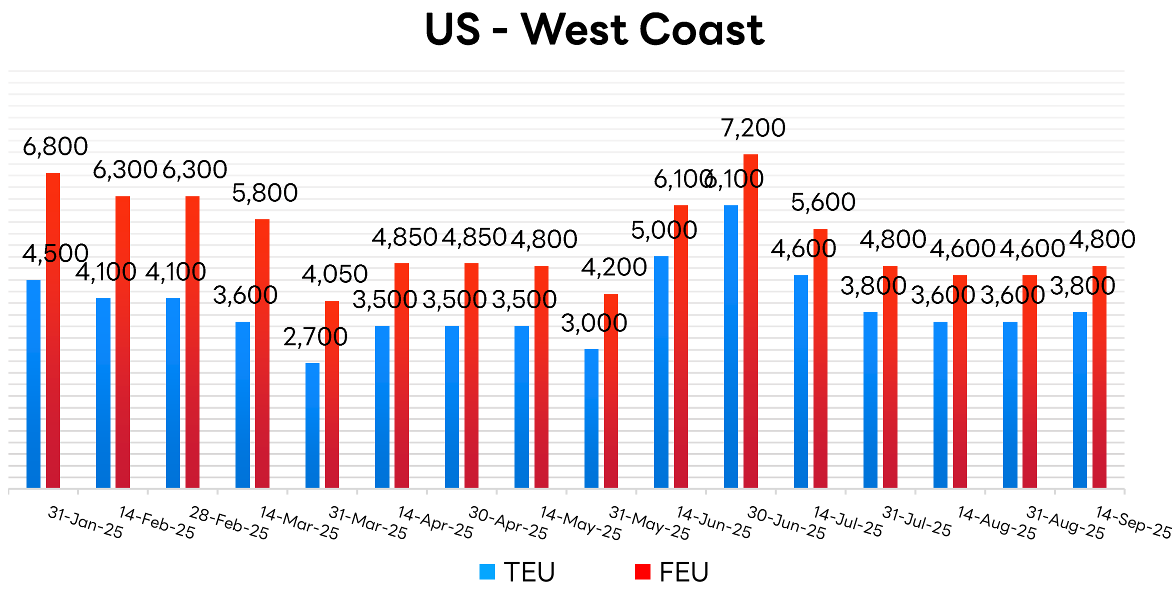
กราฟเปรียบเทียบอัตราค่าระวางเรือ ตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป 8 เดือนล่าสุด



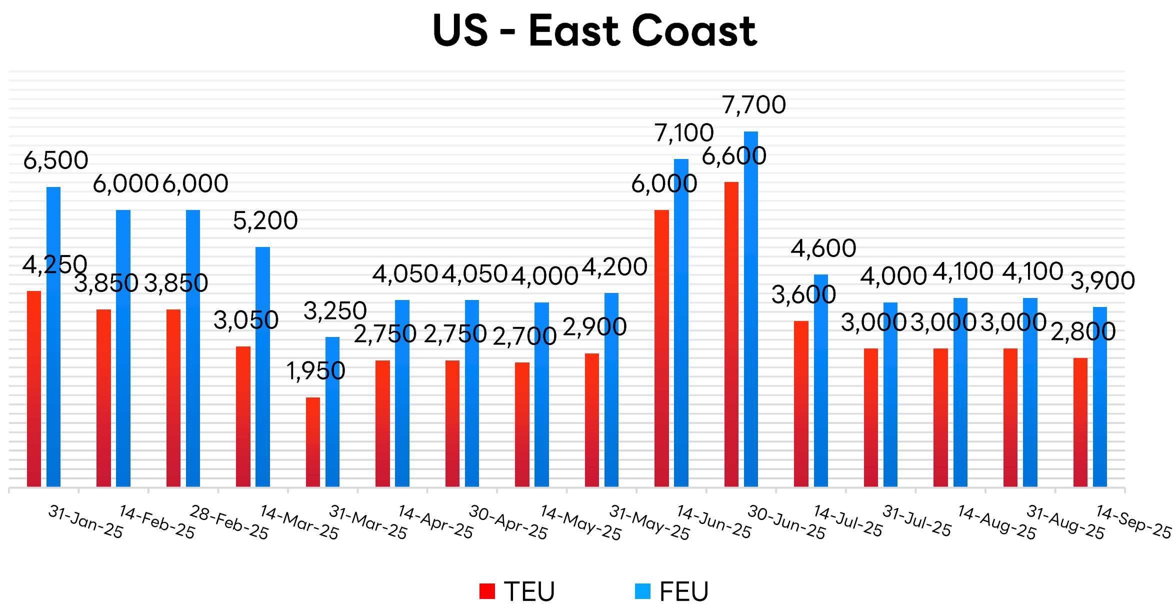
	APR-25	MAY-25	JUN-25	JUL-25	AUG-25	SEP-25
Low Sulphur Surcharge / TEU	71	53	53	Inc	Inc	Inc
Low Sulphur Surcharge / FEU	142	106	106	Inc	Inc	Inc
EU Innovation Surcharge / TEU	51 €	51 €	51 €	51 €	51 €	51 €
EU Innovation Surcharge / FEU	102 €	102 €	102 €	102 €	102 €	102 €

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

Ocean carriers intensify cost-cutting efforts as rates slide on major trades

Container lines, facing rate pressure on all major trades, are doubling down on cutting costs that have materially increased above pre-pandemic levels.

Executives from Hapag-Lloyd, Maersk and Zim Integrated Shipping Services told investors during second-quarter earnings calls that they are facing higher prices from shipbuilding to port labor. And that has prompted cost-cutting measures ranging from improving fuel efficiency through better scheduling, cutting port time, returning chartered ships at the end of contracts and slow steaming.

"Pre-COVID we were bunkering the ships on HFO [heavy fuel oil], and since then we have transitioned to VLSFO [very low-sulfur fuel oil]. This is a cost increase," Zim CFO Xavier Destriau told analysts. "If we look at the newbuilding price, that went up. The chartering rate went up. So the cost of securing tonnage has also gone up compared to the prior period."

Destriau also pointed to increases in cargo handling charges, higher wages for dockworkers that are passed on to carriers, and a lack of terminal investment that has made port congestion an ongoing challenge requiring more ships per string.

"To give you an example, our main Asia to the US East Coast service used to operate on a weekly basis with 10 ships pre-COVID, but now we need 12 in order to maintain the weekly schedule," he said.

"All these elements of additional cost have found their way into our cost structure, and that contributes to increasing the overall cost that we carry," Destriau added.

While carriers believe higher rates at the end of the second quarter and strong bookings through July will ensure third-quarter earnings are close to those recorded in the second quarter, the shipping companies are expecting a fourth-quarter decline and thus are intensifying cost-reduction efforts across their networks to mitigate any supply-demand shortfall.

Steady rise in capacity

Global demand has been resilient year to date, but J.P. Morgan in a market update Tuesday pointed to softening trends in the second half. The bank highlighted overall first-half ocean volume growth of 4.5% year over year, while real global GDP grew 3% in the same period.

"We expect market growth to slow in the second half and forecast 1.8% in Q3 and flat in Q4 [-0.3%]," the bank noted. "For 2026 onwards, we estimate volume growth of 2% per annum, broadly in line with J.P. Morgan economists' real GDP growth forecasts, as we expect the trade multiplier to hold at 1x."

J.P. Morgan is expecting the rate erosion to accelerate over the next two years as demand slows and capacity grows, pushing the industry into deep losses.

"We expect a widening demand-supply imbalance into H2 25, driven by slower demand growth into the end of the year and estimated effective supply growth of 6.5% year over year," the bank noted.

A return of sailings to the Red Sea in 2026 will drive supply growth up 9%, but even if the route remains closed, effective supply will still grow 3% to 5%, the market update predicted.

Source: https://www.JOC.com/

Rocky stretch ahead for shippers, carriers in 2026 and beyond

It is becoming hard to shake the impression that container shipping is headed into a rocky stretch — for shippers and carriers alike.

Sentiment heard with greater frequency from within the industry and from financial analysts holds that overcapacity will overwhelm constraints on capacity in a possible multi-year swoon, sending rates back to pre-COVID-19 levels and leading carriers to experience “deep losses,” according to J.P. Morgan.

“We continue to see an industry that is suffering from material oversupply,” J.P. Morgan wrote in a market update Tuesday. “We see this as a clear issue that the industry will be forced to negotiate, even if diversions away from Suez last longer than we expect.”

Thus, breaks on capacity driven by factors external to the industry, such as Red Sea diversions, as well as growing port congestion, both of which carriers have benefited enormously from since the pandemic, will be no match for the growing impact of 30% more capacity hitting the water in the coming years as the largest order book since 2009 is processed and delivered.

For US shippers facing margin pressure due to tariffs, lower rates will be a welcome relief from the toxic dynamic since COVID, when rates soared while reliability collapsed.

But there is a flip side to that: The rocky stretch for shippers will materialize as carriers react to unfavorable market dynamics, as they inevitably will. Carriers may be unable to neutralize the impact of overcapacity, but they can mitigate it, or at the very least will try.

As fundamentals deteriorate, carriers will react in ways that will be less visible to shippers, such as by increasing the scrapping of older ships. But they will also react in ways that will directly affect shippers, who will likely experience a prolonged spate of blank sailings, network adjustments and slow steaming that result in longer transit times, causing a broader supply chain impact on inventories and lead times.

That scenario will occur because, outside of the Gemini Cooperation alliance, which launched earlier this year on the premise of delivering 90%-plus schedule reliability to the market, the broader carrier industry is focused primarily on managing its network in support of its own financial well-being, even if doing so comes at the expense of customers’ desire for schedule reliability.

Liners ‘no longer intolerant’ of long-term port congestion

Carriers, especially at the higher end of the market, learned long ago that over-investment in things such as fuel to speed up and maintain schedule integrity was not typically rewarded by the market in the form of higher rates.

That made carriers skeptical of the value of reliability, a theory that proved itself during and after COVID, when reliability crashed due to the idling of ships and containers, and yet carriers earned record profits during the period. They saw it again in 2024 and 2025 when profits were propped up by the 10% or so of capacity being taken out of the market due to another factor beyond their control — the attacks on shipping in the Red Sea.

Similarly, carriers are no longer as intolerant as they once were of growing long-term port congestion in Asia and Europe, seeing the upside in taking capacity out of the market. The amount of global container ship capacity removed due to port congestion is now 4% versus 2% pre-COVID, according to J.P. Morgan — hardly a negative issue for carriers staring at a costly, multi-year gap between supply and demand.

But that gap is becoming hard to ignore. Carriers are preparing for a potentially prolonged downturn, cutting costs and modeling out scenarios where rates sink well below current levels.

In its update Tuesday, J.P. Morgan said volumes grew 4.5% in the first half of 2025 due to accelerated shipments caused by US tariffs, but the market is quickly cooling off. The bank expects market growth to slow to 1.8% in the third quarter and be flat in the fourth quarter, then grow 2% annually in 2026 and beyond based on its GDP growth forecasts.

In 2025, it sees effective supply growth of 6.5% versus 2024.

“Furthermore, we continue to expect capacity to return to the Suez Canal in 2026, which we believe will drive supply growth up to 9% [year over year],” the bank said. “If the trans-Suez route remains constrained, effective supply would likely still grow by 3%-5%, still putting pressure on rates.”

It said the 4% of capacity removed due to port congestion has “normalized” and will not grow more pronounced, meaning less impact for carriers in mitigating overcapacity.

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

DCSA turns to industry partners to drive shipping standards adoption

The Digital Container Shipping Association (DCSA) is turning to a growing network of partners to help it drive adoption of the process standards it has developed over the last six years for the shipping industry.

DCSA this summer added WNS, a technology services company that works with multiple shipping lines, to its roster of partners, which already include Lufthansa Industry Solutions, Valenciaport and multimodal logistics provider Samskip.

The addition of WNS is potentially impactful given the company’s reach into global logistics, with 30 customers that include forwarders and non-vessel-operating companies. DCSA is a nonprofit consortium founded in 2019 to develop standards among shipping lines to make it easier for shippers and logistics companies to do business across carriers.

The idea behind the partnership program, called DCSA+, is to take standards DCSA has developed around track-and-trace, electronic bills of lading, container booking and just-in-time port calls and embed them within systems used by shipping lines, their partners and customers.

Three of DCSA’s 11 carrier members are current WNS customers. Jaison Augustine, WNS’ business unit head for shipping and logistics, told the Journal of Commerce WNS sees itself as the “execution arm” of the DCSA partnership.

“We are accountable for delivering outcomes for our customers, and the standards DCSA is developing are moving toward those goals,” he said. “Standards are necessary but not sufficient in and of itself. That’s where we come in.”

Augustine said having a growing group of partners that can help implement the standards DCSA has developed might set the association up for its “IATA moment,” a reference to the long-standing International Air Transport Association that supports the airline industry.

"Standards by themselves don't dictate success," he said. "Adoption is critical."

Standards implementation grew in 2024

DCSA had somewhat of a watershed year in 2024. Use of individual standards by DCSA members grew, while nearly three-quarters of the data conveyed by electronic data interchanges (EDI) has now been converted to application programming interfaces (APIs), DCSA Chief Growth Officer Mariana Bock-Losada told the Journal of Commerce.

And yet there is still a need for DCSA's members to go faster to actually implement the standards that have been developed in the systems they use and the ones their customers and partners use.

"This is the right moment to actively start accelerating the standards," Bock-Losada said. "Collaboration has to extend beyond the members developing standards based on carriers and their priorities and implementing them in their own systems. That's why we have selected these priority partners in areas like short sea, terminals and forwarders."

Augustine said WNS is in a position to help reach those adjacent groups because the work it does is about understanding what processes work and don't work.

"We see how the sausage is made," he said. "From the quality of shipping instructions to incomplete information to the way companies submit requests, ratings, bills of lading. It's an ocean of excel sheets and workarounds."

The reason adoption is slow, Augustine said, is because if there is any friction or burden in doing something new, shippers will turn away.

"The shippers themselves say, 'if I'm dealing with six carriers, and everyone is not on the same standards, I'm not going to deal with all these different processes," he said. "There are some unique aspects of this industry where efforts to unify it have not gotten the buy in. It's endemic in the industry, primarily because it's inward-focused."

Technology spend

Augustine said it has to go back to how carriers spend their technology budget.

"Here's the paradox: every carrier spends hundreds of millions of dollars modernizing their systems, and it's a continuous cycle," he said, referencing investment in customer-facing tools like booking, rating and bill of lading.

"But my strong contention is the best of these systems doesn't give them a dollar in freight, and it doesn't give them a competitive advantage," he added. "Their service deployment and reliability is the competitive advantage."

Bock-Losada said the DCSA is pushing for investment that tackles common problems that all customers face so they can be solved in a unified way.

There will be different metrics to measuring success of the partnership program.

Bock-Losada pointed to the "volume of data being exchanged through APIs," based on DCSA standards, between carrier members and external parties.

Augustine said efficacy should be judged by the percentage of cargo moving by member lines that adheres to DCSA standards.

"But that's only from the carrier perspective," he said. "What is in it for the shippers to adopt the standards? The volume of transactions that are adhering to standards the carriers are propagating will soon be the [key performance indicator] by which we'll be measured."

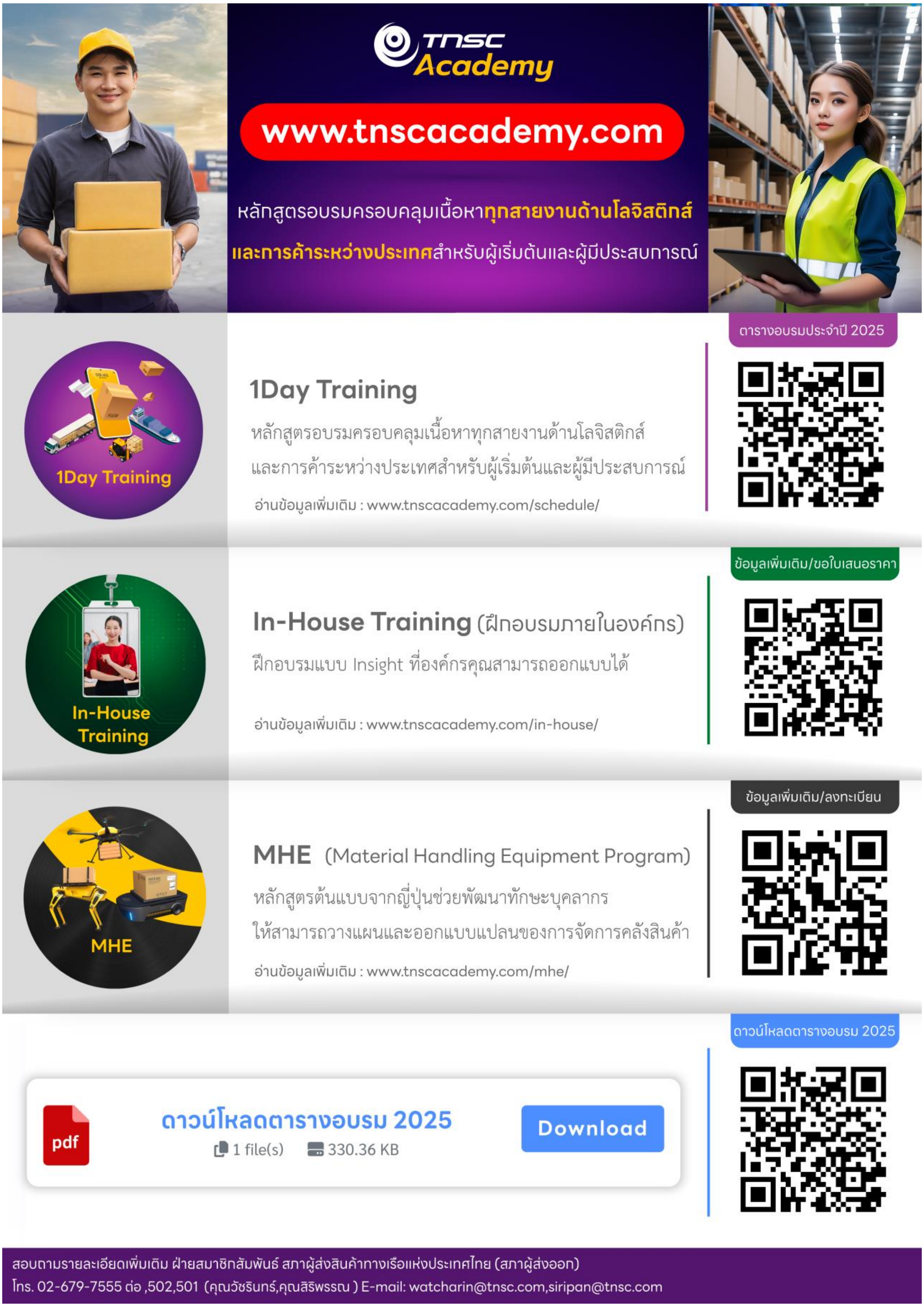
Source: https://www.joc.com/

ตารางสรุปอัตราค่าระวางจากเอเชียไปเส้นทางต่างๆ อ้างอิงจาก Shanghai Containerized Freight Index (SCFI)

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

Description	Unit	Weighting	Previous Index 22 August 2025	Current Index 29 August 2025
Comprehensive Index			1415.36	1445.06
Service Routes				
Europe (Base port)	USD/TEU	20%	1668	1481
Mediterranean (Base port)	USD/TEU	10%	2225	2145
USWC (Base port)	USD/FEU	20%	1644	1923
USEC (Base port)	USD/FEU	7.50%	2613	2866
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	1479	1579
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	1267	1325
East/West Africa (Lagos)	USD/TEU	2.50%	4015	3977
South Africa (Durban)	USD/TEU	2.50%	2996	2984
South America (Santos)	USD/TEU	5.00%	3107	3027
West Japan (Base port)	USD/TEU	5.00%	314	314
East Japan (Base port)	USD/TEU	5.00%	323	323
Southeast Asia (Singapore)	USD/TEU	7.50%	398	419
Korea (Pusan)	USD/TEU	2.50%	139	139


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
1Day Training
ตารางอบรมประจำปี 2025
1Day Training
หลักสูตรอบรมครอบคลุมเนื้อหาทุกสายงานด้านโลจิสติกส์
และการค้าระหว่างประเทศสำหรับผู้เริ่มต้นและผู้มีประสบการณ์
อ่านข้อมูลเพิ่มเติม : www.tnscacademy.com/schedule/
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ข้อมูลเพิ่มเติม/ขอใบเสนอราคา
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ฝึกอบรมแบบ Insight ที่องค์กรคุณสามารถออกแบบได้
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MHE (Material Handling Equipment Program)
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