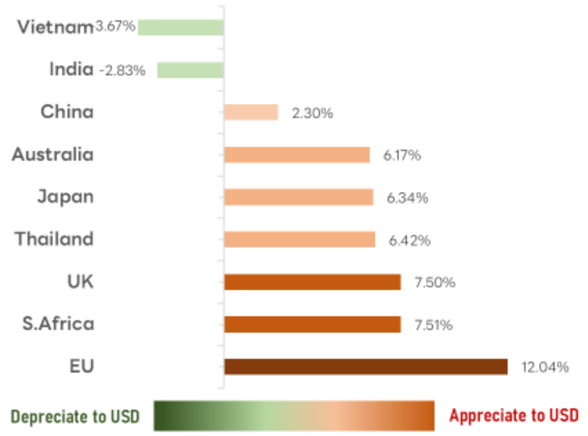
Weekly Briefing (11 September 2025)

Thai Bath Rate
To Foreign Currencies

USD	EUR	GBP	AUD
32.21	37.85	43.68	21.41
CNY	**JPY**	**INR**	**VND**
4.54	0.22	0.39	0.0012

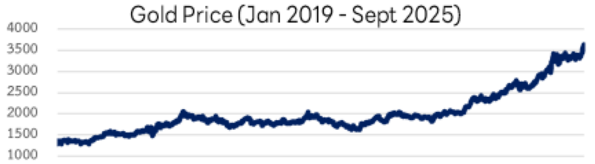
Exchange Rate Trend
To USD (YTD)



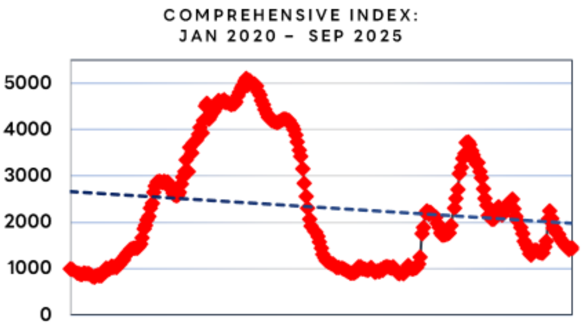
Crude Oil & Gold Price
(31 Aug - 6 Sept 2025)

Oil	OPEC	Brent	WTI
USD/Barrel	65-70	69-72	63-66

Gold : 3447-3596 USD/Ounces



Freight Index
(SCFI Comprehensive Index)



29-Aug-25	5-Sep-25
1,445.06	1,444.44
-0.62	

Weekly Top's Stories

Chinese exports grow at slowest rate in 6 months

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

New tariff exemptions announced as US imports continue to decline

รายละเอียดเพิ่มเติม : https://bit.ly/46fEK0u

Early peak, new vessels could tip Asia-Europe into overcapacity

รายละเอียดเพิ่มเติม : https://bit.ly/3Vc8WEv

Thai National Shippers' Council | สภาผู้ส่งสินค้าทางเรือแห่งประเทศไทย (สภาผู้ส่งออก)

1.https://bit.ly/4mUDcjm 2.https://bit.ly/46fEK0u 3.https://bit.ly/3Vc8WEv

อัพเดทค่าระวางเรือ

และสถานการณ์การขนส่งสินค้าทางทะเล

สัปดาห์ที่ 36 พ.ศ. 2568

สรุปค่าระวางเรือประจำสัปดาห์

"หมายเหตุ: อัตราค่าระวางที่ปรากฏเป็นอัตราฐานของสายเรือที่ประกาศเป็นทางการ ซึ่งอาจสูงกว่าหรือต่ำกว่าอัตราที่มีการเรียกเก็บจริงจากผู้ส่งออก"

CONTAINER ALL IN FREIGHT RATE (DRY)

<table>
<tr><th rowspan="2">ROUTE</th><th colspan="2">Freight</th><th colspan="3">Surcharge / Fee</th><th rowspan="2">Remark</th></tr>
<tr><th>USD/20’</th><th>USD/40’</th><th>Item</th><th>USD/20’</th><th>USD/40’</th></tr>
<tr><td>Thailand - Shanghai</td><td>50</td><td>60</td><td rowspan="5">ISOCC</td><td rowspan="5">46</td><td rowspan="5">92</td><td rowspan="20">Effective till
30-SEP-2025</td></tr>
<tr><td>Thailand - Qingdao</td><td>130</td><td>200</td></tr>
<tr><td>Thailand - Hong Kong</td><td>150</td><td>250</td></tr>
<tr><td>Thailand - Japan (Main Port)</td><td>300</td><td>500</td></tr>
<tr><td>Thailand – Kaohsiung</td><td>150</td><td>250</td></tr>
<tr><td>Thailand - Klang</td><td>150</td><td>300</td><td rowspan="6">ISOCC</td><td rowspan="6">27</td><td rowspan="6">53</td></tr>
<tr><td>Thailand - Jakarta</td><td>200</td><td>400</td></tr>
<tr><td>Thailand - Ho Chi Minh (Cat Lai)</td><td>100</td><td>200</td></tr>
<tr><td>Thailand - Singapore</td><td>180</td><td>300</td></tr>
<tr><td rowspan="2">Thailand - Manila
(North & South)</td><td>550</td><td>900</td></tr>
<tr><td colspan="2">Subject to CIC at destination</td></tr>
<tr><td rowspan="2">Thailand - Jebel Ali</td><td rowspan="2">1,150</td><td rowspan="2">1,500</td><td>ISOCC</td><td>56</td><td>112</td></tr>
<tr><td>War Risk</td><td>35</td><td>70</td></tr>
<tr><td>Thailand - South Korea (Busan)</td><td>250</td><td>500</td><td colspan="3" rowspan="2">All - In</td></tr>
<tr><td>Thailand - South Korea (Incheon)</td><td>300</td><td>600</td></tr>
<tr><td>Thailand - Nhava Sheva</td><td>900</td><td>1,200</td><td>ISOCC</td><td>64</td><td>128</td></tr>
<tr><td rowspan="2">Thailand – Durban / Cape Town</td><td rowspan="2">2,600</td><td rowspan="2">3,700</td><td>ISOCC</td><td>98</td><td>196</td></tr>
<tr><td colspan="3">Subject to SCMC USD 30/BL</td></tr>
<tr><td>Thailand - Melbourne</td><td rowspan="2">850-950</td><td rowspan="2">1,700-1,900</td><td colspan="3" rowspan="2">All - In</td></tr>
<tr><td>Thailand - Sydney</td></tr>
<tr><td rowspan="4">Thailand – Europe (Main Port)
(Rotterdam/Antwerp/Hamburg/
Le Havre)</td><td rowspan="4">1,400</td><td rowspan="4">2,300</td><td>ISOCC</td><td colspan="2">Included</td><td rowspan="6">Effective till
14-SEP-2025</td></tr>
<tr><td>LSS</td><td colspan="2">Included</td></tr>
<tr><td>EUIS</td><td>51 €</td><td>102 €</td></tr>
<tr><td colspan="3">Subject to ENS USD 30/BL
20 ft. Weight Surcharge 100-200 USD</td></tr>
<tr><td>Thailand - US West Coast</td><td>3,800</td><td>4,800</td><td colspan="3">All - In</td></tr>
<tr><td>Thailand - US East Coast
(NY/Savannah/Baltimore/Norfolk)</td><td>2,800</td><td>3,900</td><td colspan="3">New Panama Transit Tariff Surcharge
(Up to routes) USD 40-120/TEU</td></tr>
</table>

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

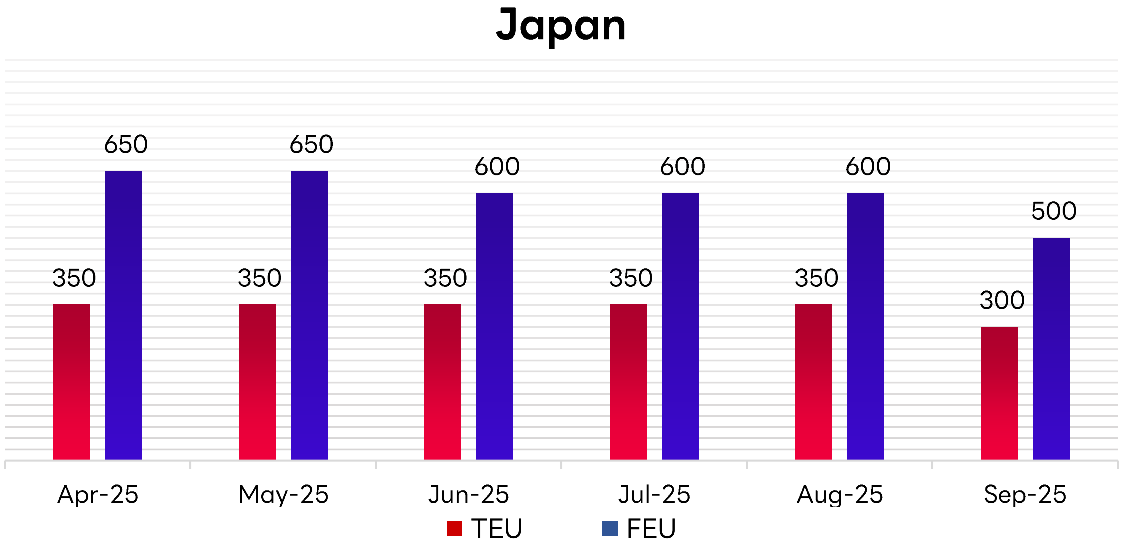
ส่วนเส้นทางออสเตรเลีย ค่าระวางคงที่ โดยอยู่ที่ 850-950 USD/TEU และ 1,700-1,900 USD/FEU ในขณะที่ เส้นทาง Europe ค่าระวางในครึ่งเดือนแรก ค่าระวางลดลง โดยอยู่ที่ 1,400 USD/TEU และ 2,300 USD/FEU

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)

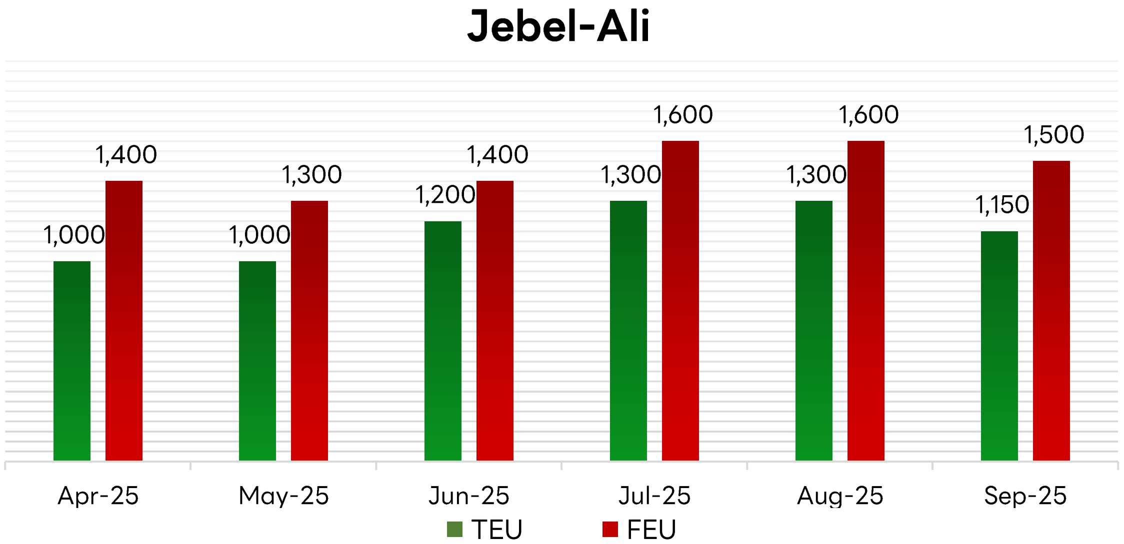
<table>
<tr><th rowspan="2">ROUTE</th><th colspan="2">SIZE</th><th rowspan="2">Bunker Surcharge / Low Sulphur Surcharge</th><th rowspan="2">Remark</th></tr>
<tr><th>USD/20’</th><th>USD/40’</th></tr>
<tr><td>Thailand-Hong Kong</td><td rowspan="2">500</td><td rowspan="2">700</td><td rowspan="2">All-in</td><td rowspan="4">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

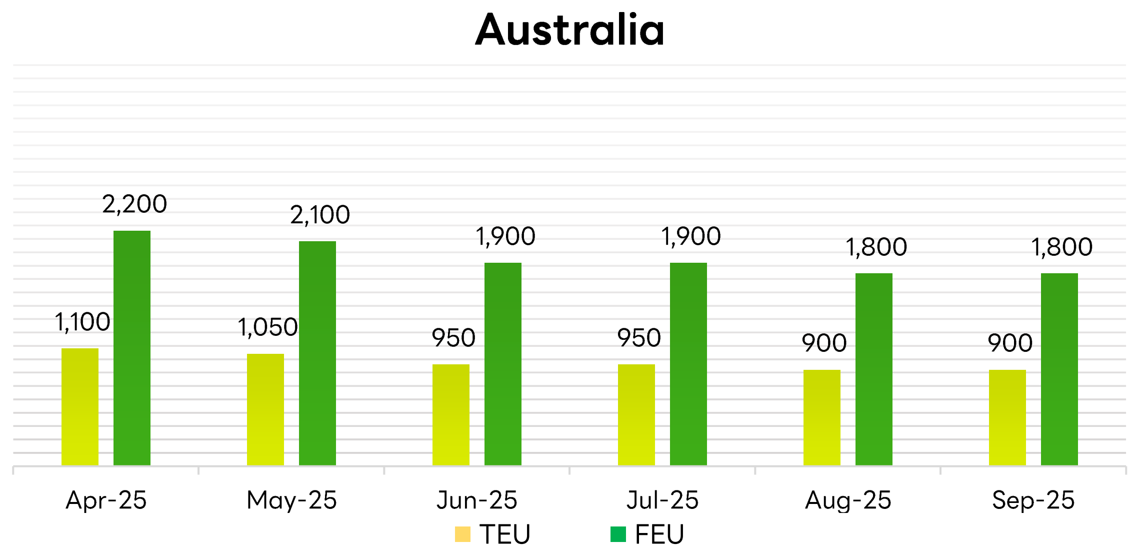
กราฟเปรียบเทียบอัตราค่าระวางเรือ ตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-Jebel Ali 6 เดือนล่าสุด



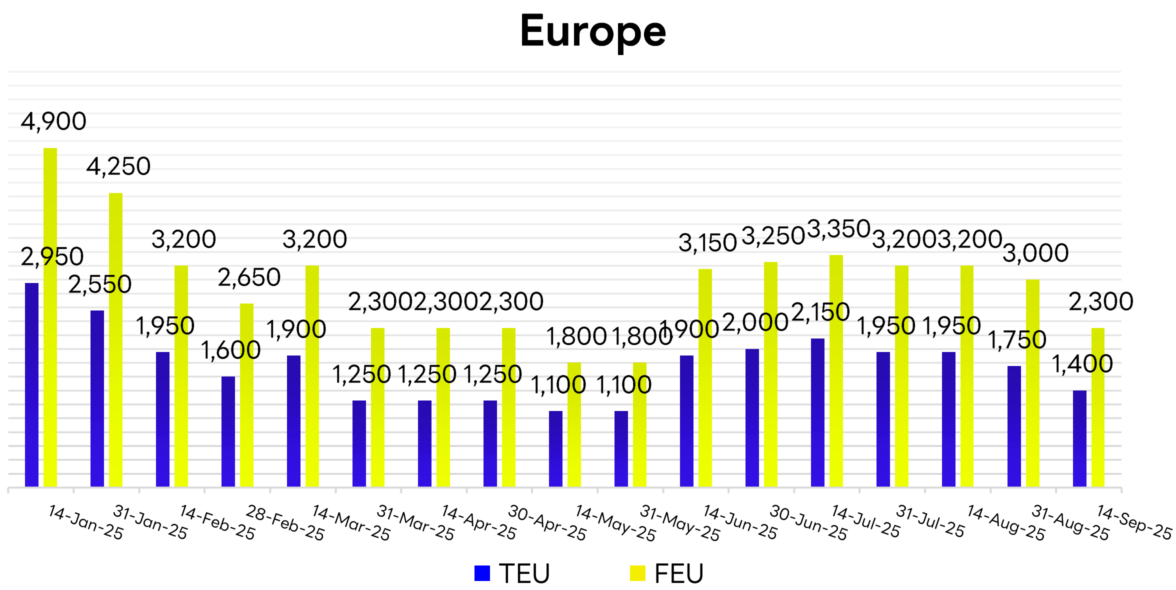
	APR-25	MAY-25	JUN-25	JUL-25	AUG-25	SEP-25
Low Sulphur Surcharge / TEU	45	22	34	45	34	56
Low Sulphur Surcharge / FEU	90	44	68	90	68	112

War Risk Surcharge: USD35/TEU และ USD70/FEU

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



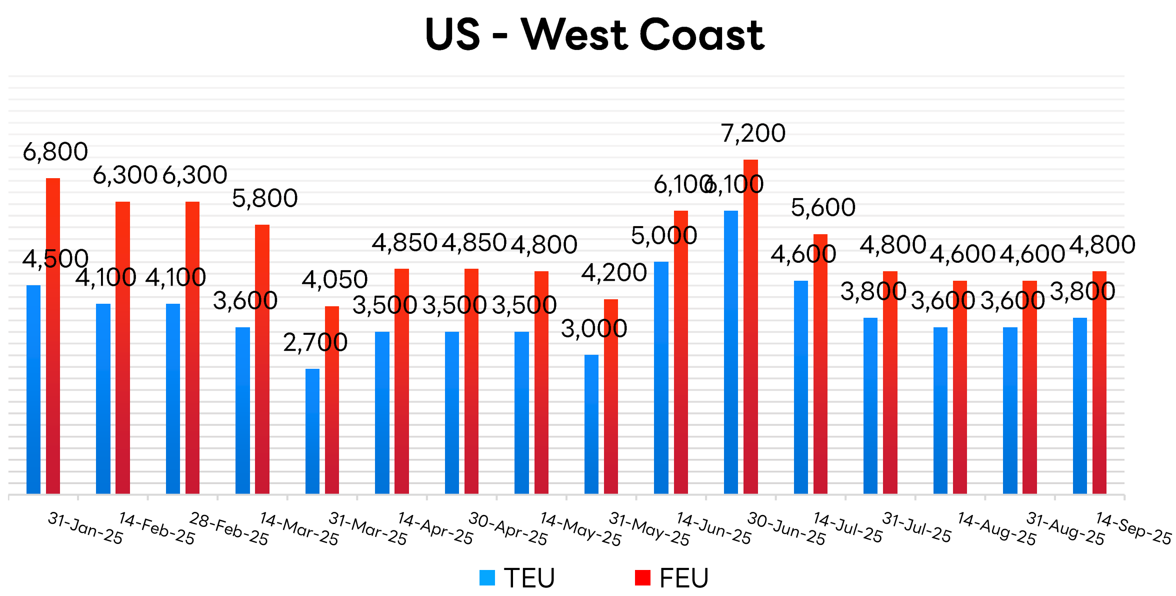
กราฟเปรียบเทียบอัตราค่าระวางเรือ ตู้ 20 และ 40 ฟุต ในเส้นทาง ไทย-ยุโรป 8 เดือนล่าสุด



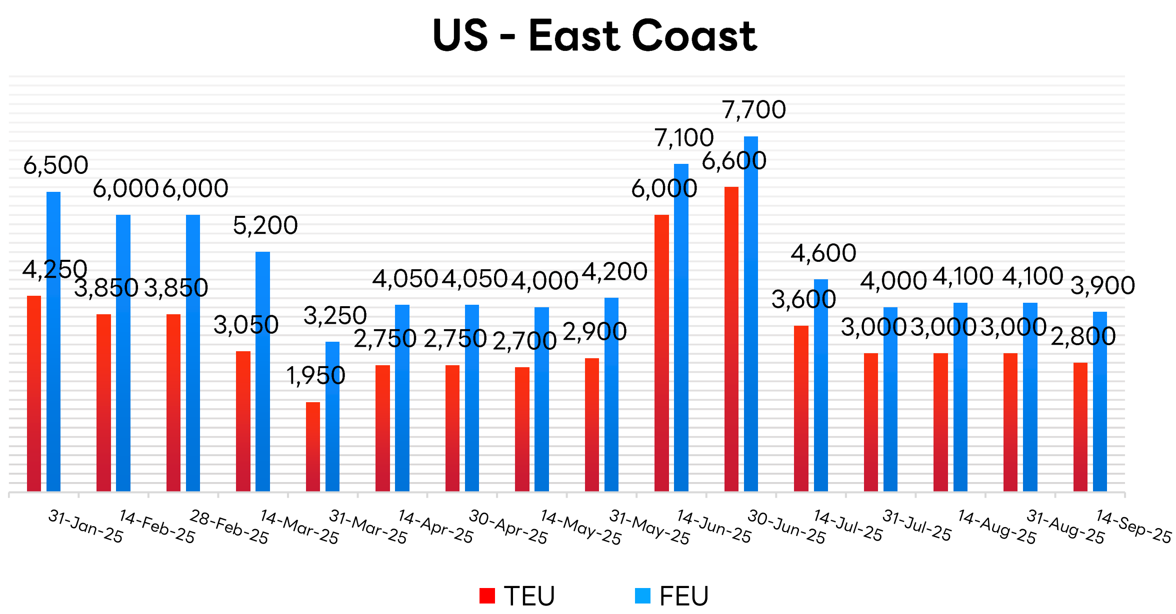
	APR-25	MAY-25	JUN-25	JUL-25	AUG-25	SEP-25
Low Sulphur Surcharge / TEU	71	53	53	Inc	Inc	Inc
Low Sulphur Surcharge / FEU	142	106	106	Inc	Inc	Inc
EU Innovation Surcharge / TEU	51 €	51 €	51 €	51 €	51 €	51 €
EU Innovation Surcharge / FEU	102 €	102 €	102 €	102 €	102 €	102 €

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

Trans-Atlantic pricing weakens without year-end volume bump

The absence of another bump of volume on the horizon for the rest of the year will further weaken the westbound trans-Atlantic trade despite fully utilized ships and low levels of blank sailings, shipping executives warn.

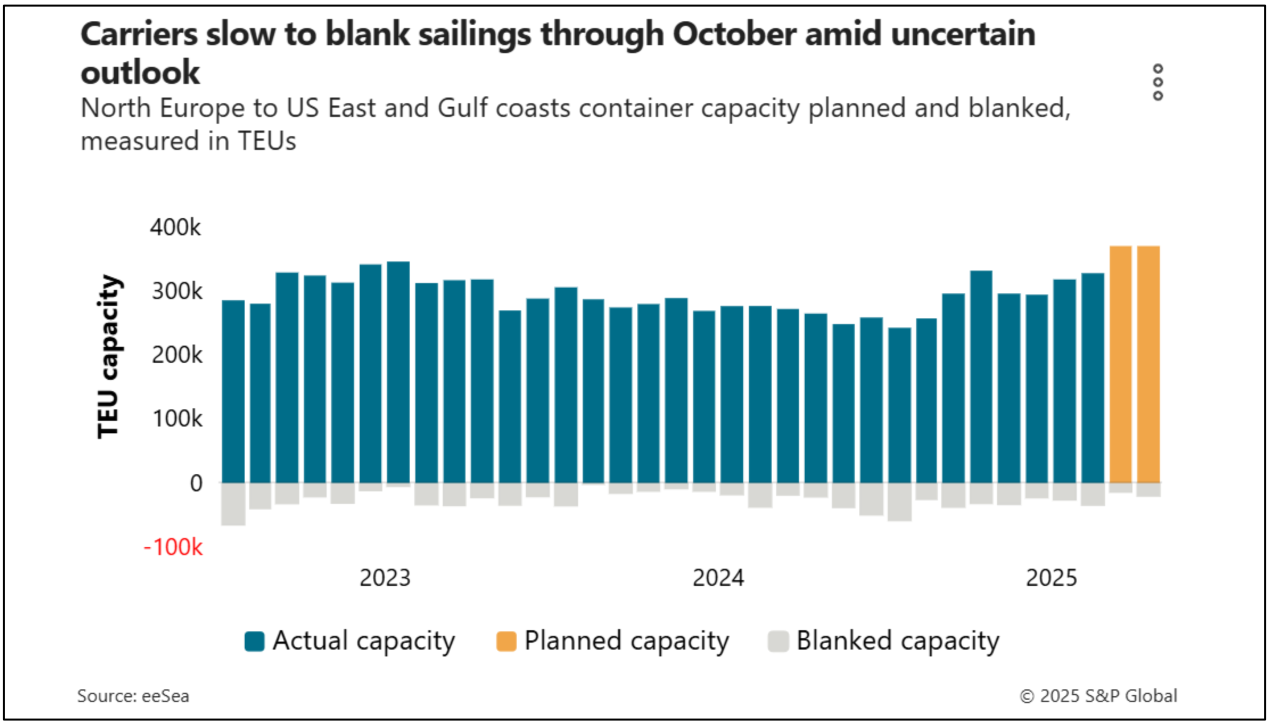
Spot and contract rates are under pressure and US retailers' subdued expectations for the winter shopping season, as reflected by low single-digit volume growth, are adding to the uncertainty gripping the trans-Atlantic.

"With long-term rates at an all-time low and moving sideways, short-term rates could slide in the near future," Destine Ozuygur, product marketing manager at rate benchmarking platform Xeneta, told the Journal of Commerce's European Shipping and Trade Outlook: The Trans-Atlantic webinar.

Data from Xeneta shows long-term rates from North Europe to the US East Coast signed in the last three months falling to $627 per FEU by Sept. 8, down 42% since Jan. 1. The long-term rate has fallen 32% since June 30.

Spot rates are following the same pattern and at $1,060 per FEU on Sept. 8, are down 43% since the beginning of the year and down 20% since June 30.

"We are not seeing blanks introduced in order to actually tighten capacity or bump up the rates, and I do believe that signals healthy demand," Ozuygur said.



Michael Britton, head of ocean products for North America at Maersk, noted that the underlying health of the US economy and imports through September appeared to be strong.

”We’re seeing pretty positive reports coming out of some of the sectors here in the US, including the retail sector,” he told the webinar. “We maintain cautious optimism that the market will continue to grow, and demand will remain positive.”

Volumes from January through July are up 2% year over year, according to the latest available data from PIERS, a sister company of the Journal of Commerce within S&P Global.

Upward trend of schedule reliability

Shippers on the trade are also benefitting from significant improvement in schedule reliability on routes from both North Europe and the Mediterranean to the US East Coast, according to Ozuygur.

”We’ve seen an increase in on-time performance from 24% to 58% from North Europe since January, and the Mediterranean monthly reliability has nudged its way up from 24% to 36%,” Ozuygur said.

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

Premier Alliance service halt latest sign of trans-Pacific demand downturn

The Premier Alliance said Friday it is suspending its express Pacific South 5 service between eastern China and the US West Coast after only four months amid a drop in demand on the eastbound trans-Pacific. The move is the latest sign that bookings before an annual holiday slowdown in Chinese production are weaker than usual, presenting a challenge to carriers trying to stem a container spot rate bleed.

Alliance members Ocean Network Express (ONE), HMM and Yang Ming gave no reason for the change in separate customer advisories, but it is possible the fall in trans-Pacific volumes amid US tariff uncertainty did not justify an express loop. The service provided a transit time of 14 days from Ningbo to Long Beach and 17 days from Qingdao to Long Beach.

Instead, the Premier Alliance carriers announced additional port calls on four other trans-Pacific services. These comprise Ningbo on its PS4 service, Qingdao on the PS6 service, Pusan on the Far East Pacific North 2 and Norfolk on the US East Coast 2 services.

The PS5 service was launched in June, but the carriers said the last sailing was by the 4,888 TEU NYK Constellation that left Qingdao Sept. 1 and was due to arrive at Ningbo Friday.

The suspension comes as container lines are announcing more blanked sailings from Asia to the US as they attempt to boost spot rates ahead of China’s Golden Week, which begins Oct. 1.

Carriers are blanking at least five sailings this week compared to two last week and two in the week before, sources confirmed.

“Blank sailing activity to the East Coast is moderate now,” James Caradonna, executive vice president of the forwarder Spedag America, told the Journal of Commerce. Several sources said they expect blanking to pick up further as Golden Week approaches.

Carriers try to recoup losses

The next four weeks offer container lines what is likely their last shot this year to claw back at least some of the recent decline in rates. Starting Oct. 1, Chinese factories will close for eight days for Golden Week.

The industry is split on whether there is any boost in cargo on the way, with forwarders seeing little signs of late-year traffic gains and a few carriers saying they are hopeful. One carrier executive said retailers should be incentivized to ship what they can this month before the Golden Week holiday.

During the second half of August, bookings for Chinese shipments into the US were down nearly 33% from the same time last year, according to data from maritime visibility provider Vizion and data and analytics company Dun & Bradstreet.

Even as carriers take more functional capacity out of the market through blank sailings, there is still plenty of slot availability, according to multiple forwarder notices seen by the Journal of Commerce. In September, carriers are blanking almost 15% of capacity into the East and Gulf coasts, according to maritime intelligence provider eeSea.

Container spot rates to both coasts have been climbing since Aug. 22, according to various indices, with the Shanghai Shipping Exchange measuring a 33.1% increase on US West Coast routing, to $2,189 per FEU over the past two weeks. Bullet rates quoted for single voyages tend to be $200-$300 less than index rates, and some forwarder quotes for US West Coast routings have been as low as $1,600 per FEU.

Several forwarders said they are already seeing some reductions to the latest general rate increase (GRI) implemented Sept. 1.

”We’ve got notifications from carriers already starting to pull the rate down — only like $100 to $200,” said a freight forwarder. “It’s not a huge drop, but we’re only four days in, [and] already seeing some rate reductions.”

“Given the lack of volume surge prior to Golden Week, these rate increases are unlikely to stick in full and, at best, will allow the carriers to maintain rate levels,” Sanjay Tejwani, CEO of consulting firm 365 Logistics, told the Journal of Commerce. “This behavior will continue as we get into [the fourth quarter] when the volume decline will be more pronounced [than the third quarter.]”

September bookings so far are lower than last year, said Robert Khachatryan, CEO of the forwarder FreightRight Global Logistics.

“It doesn’t look good to me. If there is any tightness, it is probably going to be because of the blank sailings,” he said.

Overall, another forwarder said, most shippers are not in a hurry to book their shipments, especially with the rate increases.

”The shipper has the power in that sense,” the source said. “At some point they’re [going to realize they] don’t have any inventory. But in the meantime, nobody’s in a hurry.”

The US head at a major carrier confirmed blank announcements are encouraging some bookings but noted “bookings are much slower than usual” during the lead-up to Golden Week.

Plentiful capacity

Some container lines are optimistic that demand will rise ahead of Golden Week and that demand for the rest of the year may be stronger than expected. With US inventories low, there is room for restocking even with tariffs, while US durable goods consumption continues to expand, carriers note.

"I think what we're hearing from customers is yes, they frontloaded their volumes, but US consumer demand has probably also exceeded expectations," Michael Britton, head of North American markets for ocean products at Maersk, told the Journal of Commerce.

But Britton acknowledged it was likely that Maersk would have to blank some sailings ahead of Golden Week and could trim services such as the TP9 launched in June if demand weakens more than anticipated.

"[Rates are elevated] because of pre-Golden Week push," said another carrier source. "We also have had some blanks, so some cargo is being rolled, and our [utilization] is closer to 90%, so it will keep the spot rate at the higher level."

The source said their elevated utilization had helped support rates, which is why they have not lowered their rates like some other carriers.

"If [utilization] gets to 50% or 60%, then we will start seeing drops," the source said. "Maybe by the end of the month."

Carriers are already announcing blank sailings for October, which will further constrict capacity. "There will be heavy blanks through mid-October," the first carrier executive said. "In the final week of October, they'll be reinstated."

Forwarders say that although most of the alliance carriers this week are attempting to stand firm on the Sept. 1 GRIs, space is plentiful and importers have access to special rates that could begin to erode the posted rates by mid-month.

"There is no problem getting space — across the board. Carriers are in a bit of a pickle," said Jon Monroe, who serves as an advisor to non-vessel-operating common carriers.

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

US steps up attempts to derail IMO's 'net-zero' ambitions

Liberia, Panama and other small nations that control much of the world's shipping tonnage will likely be in the crosshairs of the Trump administration as the US steps up efforts to derail the International Maritime Organization's (IMO) "net-zero" emissions framework that is up for adoption next month.

That is according to a global shipping source who did not want to be identified, citing serious consequences facing those speaking out against the US position. Those consequences were spelled out by the US State Department this week, which threatened to impose tariffs, port duties and even visa refusals on IMO member states supporting the net-zero framework, according to a report from Reuters.

The flag states of Liberia, Panama and the Marshall Islands are home to almost half of the world's gross tonnage, and that could play a crucial role during the meeting in October of the IMO's Marine Environment Protection Committee (MEPC), the shipping source said.

The proposed net-zero framework, agreed in principle by a majority of IMO member states at MEPC's meeting in April, will be up for formal adoption at the IMO session scheduled Oct. 14-17 in London. While much has been made about the need for a two-thirds majority vote in favor of the framework for it to pass, the source said the outcome will be decided by member states controlling the bulk of global tonnage.

”It is a yes or no vote and two-thirds must vote yes for adoption, and if the states voting yes constitute 50% or more of the world’s tonnage, then it’s a done deal,” the source told the Journal of Commerce.

“Marshall Islands, Liberia and Panama constitute more than 45% of the global tonnage and with China it is more than 50%, but it’s probably more possible that smaller states will bow to the US pressure than a big state,” the source added. “It’s not about the big economies. It’s about some very small states that have most of the fleet, and this new US bully policy is certainly a huge vulnerability within the whole system at the IMO.”

US escalates opposition

The greenhouse gas emissions-cutting proposal is regarded as crucial in enabling global shipping to reach climate neutrality around 2050 by introducing fuel standards and levies on ships that fail to meet strict targets.

But the IMO measure has faced escalating pushback from Washington, with the US delegation walking out of the MEPC meeting in April in protest over the decarbonization talks.

And in August, US Secretary of State Marco Rubio, Commerce Secretary Howard Lutnick, Energy Secretary Chris Wright and Transportation Secretary Sean Duffy said in a joint statement that President Donald Trump would not accept “any international environmental agreement that unduly or unfairly burdens the United States or harms the interests of the American people.”

Asked to respond to the latest US attempt to stop the net-zero proposal, the IMO said the October meeting was the appropriate platform to address any concerns from member states.

“The IMO Net-Zero Framework was approved in April 2025 and represents a collective commitment by member states to deliver on shared goals outlined in the revised IMO strategy on the reduction of GHG emissions that was adopted in 2023,” a spokesperson told the Journal of Commerce.

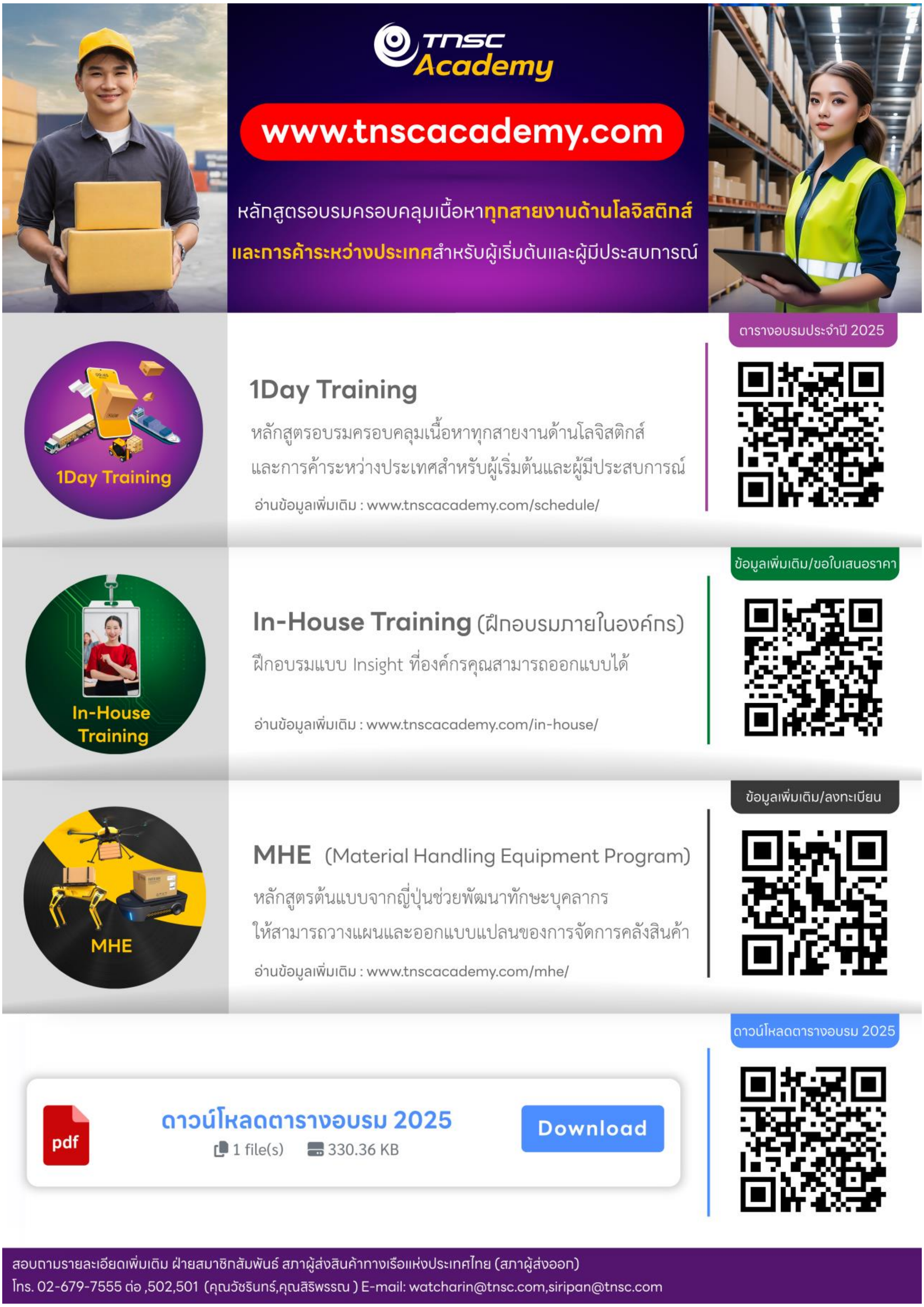
Source: https://www.joc.com/

ตารางสรุปอัตราค่าระวางจากเอเชียไปเส้นทางต่างๆ อ้างอิงจาก Shanghai Containerized Freight Index (SCFI)

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

Description	Unit	Weighting	Previous Index 29 August 2025	Current Index 5 September 2025
Comprehensive Index			1445.06	1444.44
Service Routes				
Europe (Base port)	USD/TEU	20%	1481	1315
Mediterranean (Base port)	USD/TEU	10%	2145	1971
USWC (Base port)	USD/FEU	20%	1923	2189
USEC (Base port)	USD/FEU	7.50%	2866	3073
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	1579	1519
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	1325	1313
East/West Africa (Lagos)	USD/TEU	2.50%	3977	3994
South Africa (Durban)	USD/TEU	2.50%	2984	2990
South America (Santos)	USD/TEU	5.00%	3027	3199
West Japan (Base port)	USD/TEU	5.00%	314	313
East Japan (Base port)	USD/TEU	5.00%	323	322
Southeast Asia (Singapore)	USD/TEU	7.50%	419	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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