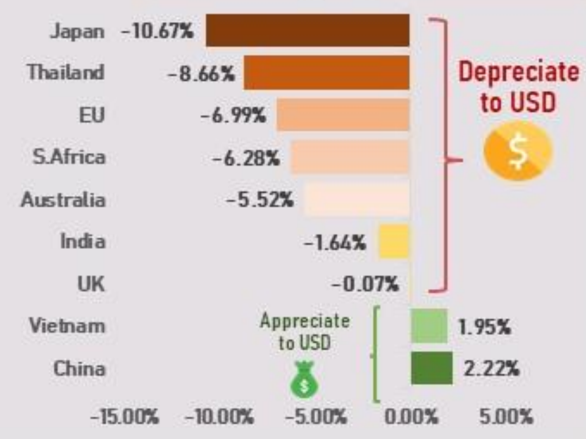
Weekly Briefing (22 NOV 2021)

01 THB rate / currencies

USD	EUR	GBP	AUD
32.60	37.02	43.96	23.70
CNY	**JPY**	**INR**	**VND**
5.10	0.29	0.44	0.0014

02 Exchange rate trend to USD (YTD)



03 Crude Oil price & Gold (15-19 Nov)

Oil	OPEC	Brent	WTI
USD/Barrel	81-82	80-82	77-80

Gold	1,852 – 1,869 USD/Ounces

04 Freight Index (SCFI Comprehensive Index)

Freight Index (SCFI Comprehensive Index)

12 November 2021	19 November 2021
4,554.04	4,555.21

+ 1.17

05 Weekly Top's Stories

รายละเอียดข่าว/บทความ

1. RCEP บังคับใช้ 1 ม.ค. 2565
   รายละเอียดเพิ่มเติม : https://bit.ly/3Ol9Wrm

2. Ports of Los Angeles & Long Beach Container Excess Dwell Fee - UPDATE
   รายละเอียดข่าว : https://bit.ly/3CFFr20

3. Biden endorses shipping reform, urges FMC to challenge alliances
   รายละเอียดข่าว : https://bit.ly/3CGtgST

Thai National Shippers' Council   สภาผู้ส่งสินค้าทางเรือแห่งประเทศไทย (สภาผู้ส่งออก)

การอัพเดทค่าระวางเรือประจำสัปดาห์
สัปดาห์ที่ 46 พ.ศ. 2564

สรุปค่าระวางเรือประจำสัปดาห์

"หมายเหตุ: อัตราค่าระวางที่ปรากฏเป็นอัตราฐานของสายเรือที่ประกาศเป็นทางการ ซึ่งอาจต่ำกว่าอัตราที่มีการเรียกเก็บจริงจากผู้ส่งออก"

CONTAINER ALL IN FREIGHT RATE (DRY)

<table>
<tr><th rowspan="2">ROUTE</th><th colspan="2">SIZE</th><th rowspan="2">Low Sulphur Surcharge (LSS)</th><th rowspan="2">Remark</th></tr>
<tr><th>USD/20’</th><th>USD/40’</th></tr>
<tr><td>Thailand - Shanghai</td><td>650</td><td>1,200</td><td rowspan="5">Subject to ISOCC
USD 46/TEU, USD 92/FEU</td><td rowspan="24">Effective till
30-Nov-2021</td></tr>
<tr><td>Thailand - Qingdao</td><td>700</td><td>1,300</td></tr>
<tr><td>Thailand - Hong Kong</td><td>400</td><td>700</td></tr>
<tr><td>Thailand - Japan (Main Port)</td><td>500</td><td>1,000</td></tr>
<tr><td>Thailand - Kaohsiung</td><td>550</td><td>1,100</td></tr>
<tr><td>Thailand - Klang</td><td>500</td><td>900</td><td rowspan="6">Subject to ISOCC
USD 27/TEU, USD 53/FEU</td></tr>
<tr><td>Thailand - Jakarta</td><td>500</td><td>900</td></tr>
<tr><td>Thailand - Ho Chi Minh (Cat Lai)</td><td>400</td><td>750</td></tr>
<tr><td>Thailand - Singapore</td><td>450</td><td>950</td></tr>
<tr><td rowspan="2">Thailand - Manila
(North & South)</td><td>700</td><td>1,600</td></tr>
<tr><td colspan="2">Subject to CIC at destination</td></tr>
<tr><td>Thailand - Jebel Ali</td><td>3,900</td><td>6,800</td><td>Subject to ISOCC
USD 45/TEU, USD 90/FEU
War Risk Surcharge: USD 35/TEU,
USD 75/FEU</td></tr>
<tr><td>Thailand - South Korea (Busan)</td><td>300</td><td>600</td><td rowspan="2">LSS: USD 80/TEU, USD 160/FEU</td></tr>
<tr><td>Thailand - South Korea (Incheon)</td><td>350</td><td>700</td></tr>
<tr><td>Thailand - Nhava Sheva</td><td>4,300</td><td>5,900</td><td>ISOCC: USD 36/TEU, USD 72/FEU</td></tr>
<tr><td>Thailand - Melbourne</td><td rowspan="2">3,050-3,150</td><td rowspan="2">6,100-6,250</td><td rowspan="2">FAF: USD 108/TEU, USD 216/FEU</td></tr>
<tr><td>Thailand - Sydney</td></tr>
<tr><td rowspan="2">Thailand – Durban / Cape Town</td><td>4,300</td><td>7,600</td><td rowspan="2">Subject to ISOCC
USD 75/TEU, USD 150/FEU</td></tr>
<tr><td colspan="2">Subject to SCMC USD 30/BL</td></tr>
<tr><td rowspan="2">Thailand – Europe (Main Port)</td><td>7,400</td><td>13,200</td><td rowspan="2">ISOCC: USD 88/TEU, USD 176/FEU
PSS: USD500/TEU, USD1,000/FEU</td></tr>
<tr><td colspan="2">Subject to ENS USD 30/BL</td></tr>
<tr><td>Thailand - US West Coast</td><td>Standard Rate:
10,000</td><td>Standard Rate:
12,700/13,300</td><td rowspan="3"></td></tr>
<tr><td rowspan="2">Thailand - US East Coast</td><td>Standard Rate:
13,000
Premium Rate:
15,000</td><td>Standard Rate:
15,700/16,500
Premium Rate:
18,500</td></tr>
<tr><td colspan="2">Subject to Panama Low Water
USD 30-60/Container</td></tr>
</table>

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

สถานการณ์ค่าระวางในช่วงเดือนพฤศจิกายน 2564 ค่าระวางในเส้นทางเอเชียปรับเพิ่มขึ้นในหลายเส้นทาง โดยเส้นทาง Shanghai ค่าระวางเพิ่มขึ้น 100 USD/FEU ทำให้ค่าระวางอยู่ที่ 650 USD/TEU และ 1,200 USD/FEU เส้นทาง Klang ค่าระวางเพิ่มขึ้น 100 USD/TEU และ 100 USD/FEU ทำให้ค่าระวางอยู่ที่ 500 USD/TEU และ 900 USD/FEU และเส้นทาง Japan ค่าระวางเพิ่มขึ้น 100 USD/FEU ทำให้ค่าระวางอยู่ที่ 500 USD/TEU และ 1,000 USD/FEU สำหรับเส้นทาง Durban ค่าระวางปรับเพิ่มขึ้น 100 USD/TEU และ 200 USD/FEU ทำให้ค่าระวางอยู่ที่ 4,300 USD/TEU และ 7,600 USD/FEU ส่วนเส้นทาง Hong Kong ค่าระวางคงที่อยู่ที่ 400 USD/TEU และ 700 USD/FEU โดยค่า Low Sulphur Surcharge ปรับลดลงเล็กน้อยตามราคาน้ำมันในตลาดโลก

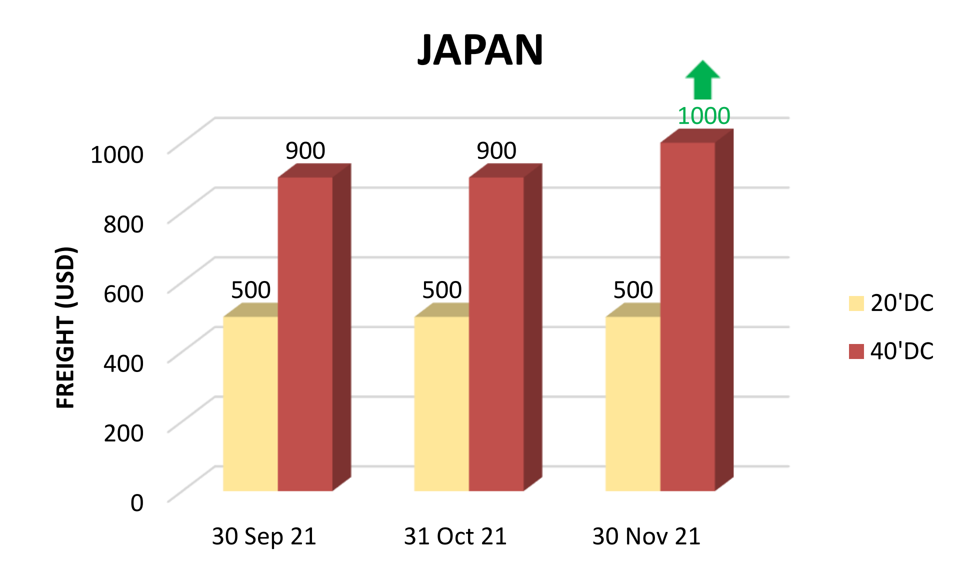
ส่วนเส้นทางออสเตรเลีย ค่าระวางในเดือนพฤศจิกายน อัตราค่าระวางคงที่อยู่ระหว่าง 3,050-3,150 USD/TEU และ 6,100-6,250 USD/FEU โดยมีการปรับเพิ่มของค่า FAF ในขณะที่ เส้นทาง Europe ค่าระวางช่วงครึ่งเดือนหลังของเดือนพฤศจิกายน ค่าระวางคงที่อยู่ที่ 7,400 USD/TEU และ 13,200 USD/FEU โดยมีบวกเพิ่มค่า LSS และ PSS ในอัตราเดิม

ส่วนเส้นทางสหรัฐอเมริกา ช่วงครึ่งเดือนหลังของเดือนพฤศจิกายน ค่าระวางฝั่ง West Coast ปรับลดลง 1,620 USD/TEU, 1,450 USD/40'DC และ 1,000 USD/40'HQ โดยค่าระวางอยู่ที่ 10,000 USD/TEU, 12,700 USD/40'DC และ 13,300 USD/40'HQ ในขณะที่ค่าระวางฝั่ง East Coast ปรับเพิ่มขึ้น 380 USD/TEU, 300 USD/40'DC และ 800 USD/40'HQ ทำให้ค่าระวางอยู่ที่ 13,000 USD/TEU, 15,700 USD/40'DC และ 16,500 USD/40'HQ ส่วนค่าระวางที่เป็น Premium Rate อาจสามารถ Apply ได้เฉพาะเรือบางลำ ทั้งนี้ สถานการณ์ปัจจุบันยังคงพบปัญหาระวางเรือเต็ม สายเรือมีการทำ Blank Sailing เนื่องจากพบปัญหาความหนาแน่นบริเวณท่าเรือปลายทาง ขอให้วางแผนการจองล่วงหน้า

CONTAINER FREIGHT RATE (REEFER)

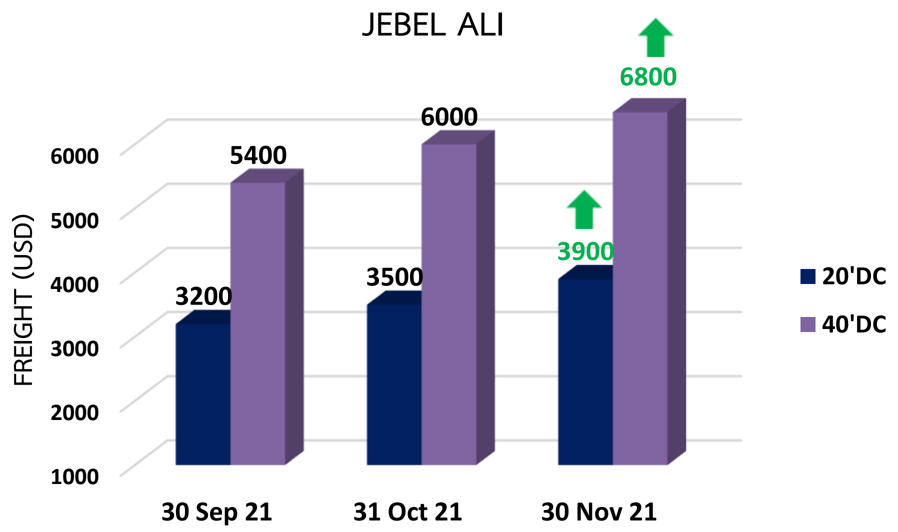
ROUTE	SIZE		Bunker Surcharge / Low Sulphur Surcharge	Remark
	USD/20'	USD/40'		
Thailand-Hong Kong Thailand-Shanghai	-	1,300	USD 138/FEU	Effective till 30-Nov-2021
Thailand-Japan (Tokyo, Yokohama)	1,400-1,500	1,700-1,900	USD 41/TEU, USD 82/FEU	Effective till 31-Dec-2021
Thailand-EU (Main Ports) (DEHAM, NLRTM, FRLEH)	9,000	13,000	OBS: USD 256/TEU, USD 512/FEU + PSS: USD 500/TEU, USD 1,000/FEU	Effective till 30-Nov-2021
London Gateway / Southampton	10,000	14,000		

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ญี่ปุ่น เดือน ก.ย. ถึง พ.ย. ปี 2564



Subject to Low Sulphur Surcharge (Sep.-Oct.21): USD 57/TEU และ USD 115/FEU
(Nov.21): USD 46/TEU และ USD 92/FEU

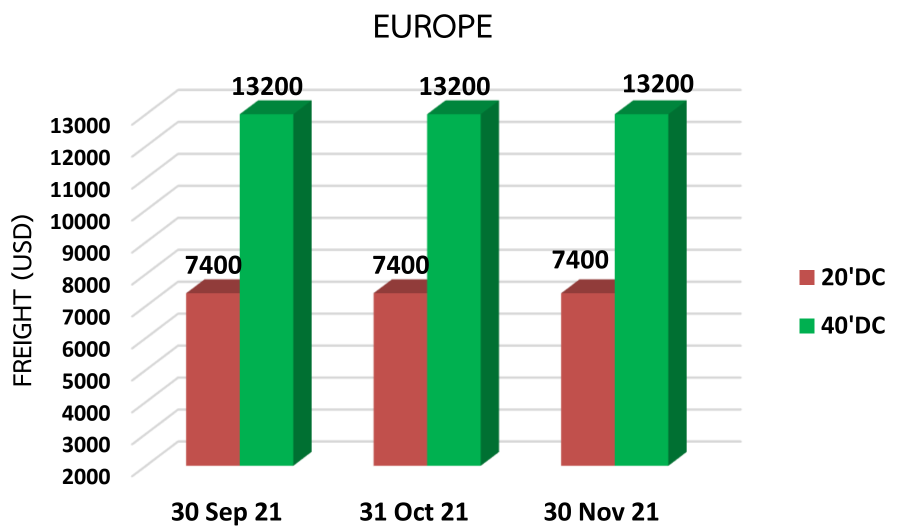
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-Jebel Ali เดือน ก.ย. ถึง พ.ย. ปี 2564



Subject to

- Low Sulphur Surcharge (Aug.-Oct 21): USD56/TEU และ USD112/FEU
  (Nov. 21): USD45/TEU และ USD90/FEU
- War Risk Surcharge: USD35/TEU และ USD70/FEU

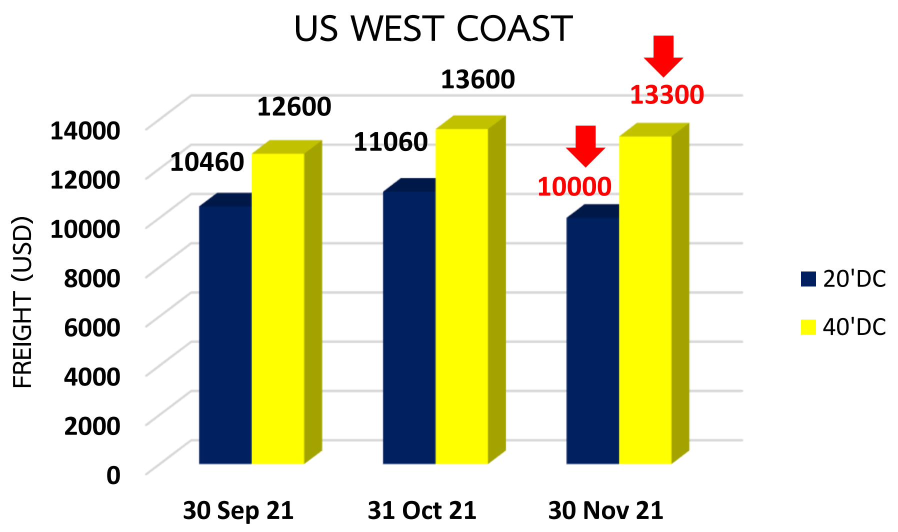
กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-ยุโรป เดือน ก.ย. ถึง พ.ย. ปี 2564



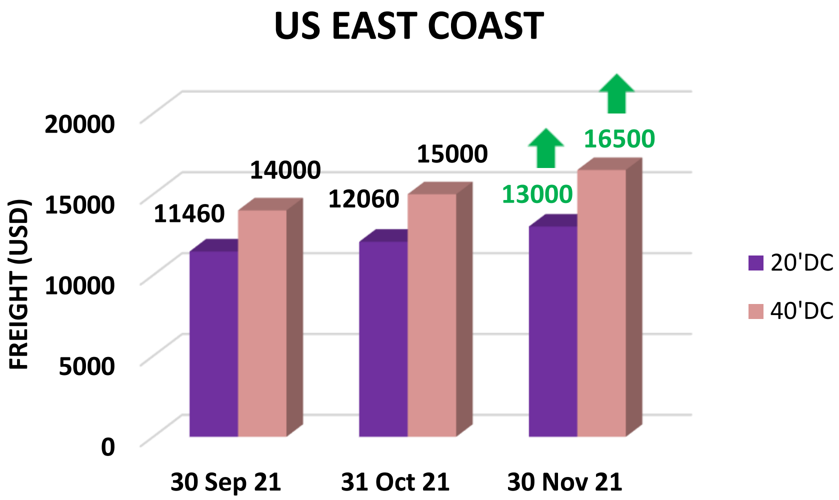
Subject to

- ISOCC (Sep.-Nov. 21): USD88/TEU, USD176/FEU
- ENS: USD30/BL
- PSS: USD500/TEU, USD1,000/FEU

กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต
ในเส้นทาง ไทย-สหรัฐอเมริกา West Coast เดือน ก.ย. ถึง พ.ย. ปี 2564



กราฟเปรียบเทียบอัตราค่าระวางเรือตู้ 20 และ 40 ฟุต ในเส้นทาง ไทย-สหรัฐอเมริกา East Coast เดือน ก.ย. ถึง พ.ย. ปี 2564



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

➢ **รวบรวมประกาศสำคัญของสายเรือ**

<u>สายเรือ Hapag Lloyd</u>

- ประกาศแจ้งเรื่องการนำเข้าสินค้าประเภท Reefer จำพวกเนื้อสัตว์แช่แข็ง และอาหารทะเลแช่งแข็งไปยังท่าเรือ Dalian ประเทศจีน เนื่องจากข้อกำหนดด้านศุลกากร ซึ่งหากมีสินค้าไปยังเส้นทางดังกล่าว สายเรือให้ข้อแนะนำดังนี้
  - ให้เปลี่ยนไปยังท่าเรือ Qingdao, Tianjin หรือท่าเรืออื่นๆ แทน (ซึ่งขึ้นอยู่กับใบอนุญาตนำเข้าของประเภทสินค้าที่ขนส่ง)
  - ส่งตู้กลับมายังท่าเรือต้นทาง
  - หากไม่ได้รับการแจ้งความประสงค์จากผู้ส่งออก สายเรือจะดำเนินการตามความเหมาะสม

  หากต้องการสอบถามข้อมูลเพิ่มเติม สามารถติดต่อโดยตรงไปยังสายเรือ
- ประกาศแจ้งเรียกเก็บค่า Winter Surcharge ในอัตรา USD 75/TEU สำหรับสินค้าที่นำเข้า หรือส่งออกไปยังท่าเรือ St. Petersburg and Ust-Luga ประเทศรัสเซีย โดยมีผลตั้งแต่วันที่ 1 ธันวาคม 2564

US ports making progress towards easing supply chains

But a White House briefing questioned the size and power of container shipping alliances, called for greater funding for and oversight from the FMC, and ‘reforms to our shipping laws’ that ‘would help further improve our ability to get goods in and out of this country more quickly and cost effectively’. US west coast container ports appear to be making significant progress towards easing congestion of loaded and empty containers, and retail shelves and warehouses are currently close to pre-pandemic stock levels, according to analysis by the White House. But the White House briefing questioned the size and power of container shipping alliances, called for greater funding for and oversight from the US maritime regulator the Federal Maritime Commission (FMC), and said that “reforms to our shipping laws would help further improve our ability to get goods in and out of this country more quickly and cost effectively”.

In an update this week on progress in dealing with recent supply chain blockages, the White House noted: “Earlier this month, we announced that we would, twice a month, track how well our nation’s transportation and logistics supply chain is handling the increase in demand for goods as we recover from the pandemic. With the data for the full month of October now in, we continue to see the goods movement supply chain moving more goods than ever before, goods reaching stores, and the velocity of goods leaving the Ports of Los Angeles and Long Beach increasing."

<u>Tracking progress at ports</u>

It highlighted that earlier this week, the Ports of Los Angeles and Long Beach offered preliminary estimates of 849,000 loaded containers imported in October. "This brings the total number of containers they have imported between January and October to 8.6 million, which is 16% more than their previous record over the same period in 2018. The ports also reduced the number of containers sitting on the docks for more than 9 days by about one-third (32%) over the first two weeks of November," the White House commented.

"We continue to monitor the ability of the goods movement supply chain to get goods from the ports to store shelves. Census data, specifically inflation-adjusted retail inventories without autos, show that the value of the goods on retailers' store shelves and in their warehouses grew between the end of September and the end of October and is now 1% above its pre-pandemic level. Higher frequency data from IRI show that the share of consumer-packaged goods that are in stock was 90% last week, just one percentage point below its pre-pandemic level."

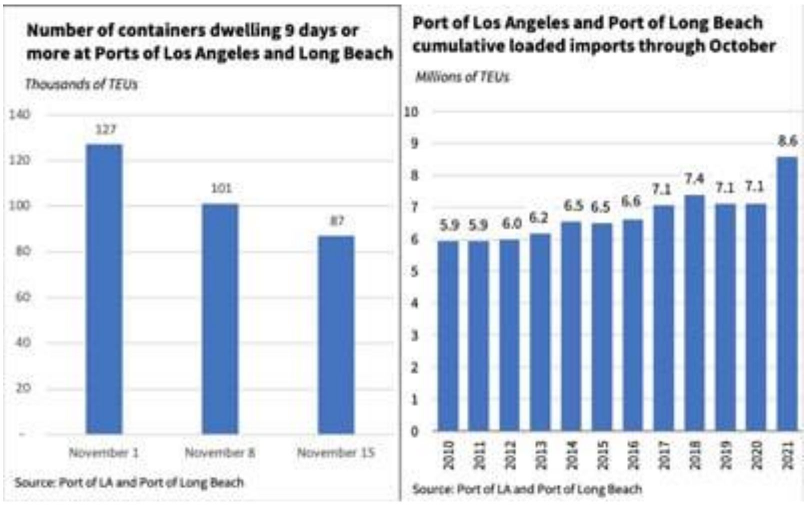
It noted that the goods movement chain "is controlled by the private sector, which is why we have continued to work closely with the private sector to drive improvements to the system", adding: "Corporate leaders have recently reaffirmed that the system is successfully moving products. In discussing the holiday season, FedEx CEO Fred Smith said: "I think we're ready for this. This year we're forecasting we will deliver 100 million more shipments in this holiday season than we did in 2019."

In a call with President Biden last week, Target CEO Brian Cornell "shared that we are ready to deliver a great shopping experience for guests this holiday season," that inventories are higher than last year, and that they are seeing containers move at night at the ports of Los Angeles and Long Beach. Walmart said it "had more products flowing through its supply chain than during the same period last year when pandemic demand for some products strained supply. Its US inventory rose 11.5% in the quarter," the White House reported.

<u>Reducing congestion to increase speed</u>

It said the reduction in long-dwelling containers was due, in part, to a new congestion fee the ports imposed on ocean carriers, adding: "The carriers have been so successful at clearing the docks that the ports announced this week they would postpone charging the fee. Reducing the number of containers sitting at the port improves overall efficiency by creating more space for containers to be unloaded more quickly and giving trucks more room to manoeuvre." But it stressed that the docks are not just full of loaded containers, with "thousands of empty containers remain on the docks as well, often sitting on chassis. Without these chassis, trucks are unable to remove containers from the docks, and a shortage of chassis has contributed to the increase in dwell times at the ports.

"The ocean carriers have now agreed to clear more of these empties from the docks faster, including bringing in vessels dedicated to empty removal. Based on these new commitments, they have already cleared out 60,000 containers (measured in TEUs), with commitments to remove another 28,000," the White House noted.



<u>Restoring balance at ports</u>

The White House also highlighted the recent problems with US exports, noting that although agricultural exports from ports are up 6% compared to the same period last year, when measured by weight, the roughly one quarter of agricultural exports by ship that move by container have seen those volumes fall by 2% this year.

"Our work to reduce congestion at the Port of Savannah – the top containerized agricultural export port in the country by number of containers – should help improve the flow of agricultural exports," the White House claimed. "With five pop-up container yards located throughout the Southeast, farmers will have more ways to get commodities via truck or rail to this critical port." But it continued: "More work is still needed, however, to improve exports out of the nation's ports. The rise in cost of shipping between Asia and the West Coast has meant that it is more profitable for the ocean carriers to quickly load empty containers or return without a full ship instead of waiting for loaded containers to get into the port. The share of exported containers at the two ports that are empty has risen from around 55% in the five years preceding the pandemic to over 70% so far this year."

It said this problem "is affecting more businesses than just farms and raises questions about the fair treatment of American exporters and importers in the shipping industry", questioning whether container shipping alliances have contributed to the problems and whether they now have too much power. "Today a system of global alliances dominates global shipping where nine carriers that have been organized into three alliances control about 80% of the global shipping market, and 95% on the critical East-West trade lanes. Alliances only controlled 29% of the market as recently as 2011," the White House noted.

"This lack of competition leaves American businesses at the mercy of just three alliances. Retailers are charged fees for their container remaining on the docks, even if there is no way to move their containers. If the alliances decide to not accept exports, agricultural exporters will not be able to fulfil their contracts, and farmers' perishable products may be left to rot. "In July, the President called attention to these problems in his Executive Order on Promoting Competition in the American Economy, which encouraged the Federal

Maritime Commission to vigorously enforce the prohibition against ocean carriers charging unfair fees to exporters and importers. The Federal Maritime Commission, which has jurisdiction to regulate the carriers, should use all of the tools at its disposal to ensure free and fair competition. It has already launched an inquiry into excessive shipping fees that are charged when the importer or exporter cannot plausibly move the container."

The White House continued: "The FMC should consider using its other tools, too. For example, while the alliances between the carriers receive statutory immunity from antitrust laws, the FMC can challenge those agreements if they 'produce an unreasonable reduction in transportation service or an unreasonable increase in transportation cost or … substantially lessen competition'. "The Justice Department stands ready to lend the FMC its expertise and support. In fact, the two agencies have already increased their collaboration, which is part of the 'whole of government' approach to promoting competition launched by the Executive Order on Competition." It continued: "Congress should take action here as well. The FMC needs more resources to oversee an industry with the size and scope of global shipping. Its annual budget is just around $30 million. Current laws also do not require even basic transparency in this sector.

"For example, there is no public reporting of the detention and demurrage fees carriers are charging their customers. Moreover, Congress should provide the FMC an updated toolbox to protect exporters, importers, and consumers from unfair practices. There is bipartisan support for doing this, including a bipartisan bill sponsored by California Democrat John Garamendi and South Dakota Republican Dusty Johnson. Their proposed legislation includes good first steps towards the type of longer-term reform to shipping laws that would strengthen America's global competitiveness."

The White House briefing concluded: "We look forward to working with members of both parties in Congress to ensure that we have a system of maritime regulation that boosts instead of reduces American competitiveness for both importers and exporters. That would complement the bipartisan infrastructure deal that the President signed into law this week, which is one step in the President's broader strategy to build a more durable industrial strategy that will bolster America's global economic competitiveness.

"Reforms to our shipping laws would help further improve our ability to get goods in and out of this country more quickly and cost effectively, and strengthen opportunities for US businesses to connect with global markets."

Source: https://www.lloydsloadinglist.com/

Freight rate normalisation will take 18-30 months

Shippers warned that easing of ocean freight rates will be a slow process, if history is any guide. Freight rates may have peaked for now and be coming down from their all-time highs. But any resetting to prior levels could take another two years, according to analysis by Sea-Intelligence. Although the Shanghai Containerised Freight Index added 0.4% in the past week, other indices show a downturn in the rates paid, including Freightos' Baltic Index, which recorded an 11% decline on its global index and a sharp 21% fall on the transpacific, and Xeneta, which also recorded a smaller decline on the Asia-US west coast routing.

While each index uses its own methodology, the direction of travel indicates that some of the froth is coming out of the overheated spot market. One likely reason for this is that those shippers desperate to ship goods in time to meet the US holiday shopping season, and willing to pay any amount to do so, have now missed their window of opportunity.

Nevertheless, inventory restocking and the rush to get goods out of Asia ahead of the Chinese New Year holiday in February are likely to mean that freight rates remain firm for some time yet. Moreover, the historical progress from peak rates to normalised rates is often a long and drawn-out process. An analysis of five periods of sustained rate declines since 1998, conducted by Sea-Intelligence, indicates that it could take between 18 and 30 months before rates stabilise anywhere near their prior levels.

Tug-of-war between shippers and carriers

“The current situation is highly unusual and among many pertinent questions is the one about how quickly freight rates will normalise,” said Sea-Intelligence chief executive Alan Murphy. “This depends on a myriad of operational issues linked to the bottlenecks, as well as the commercial outcome of the impending tug-of-war between shippers and carriers on the rate levels themselves.” Previous periods of declining rates had seen falls of as much as 40% from their high points. Each decline had taken different periods of time between the peak and trough, but it was still possible to assess the weekly rate of decline across the period.

“The rate of decline ranges between 0.4% and 0.9% per week, from top to bottom,” he said. “This therefore indicates the speed of rate collapse seen in the five previous cases of prolonged declines. If these five periods are to reflect the inherent pricing mechanisms in the industry — and if these mechanisms remain in force — then we can use this to calculate a reversal back to normality.”

A long-term view of freight rates showed that carriers had been able to maintain a level of control during the first decade of this century, despite periods of decline. But from 2015-2019, this power had weakened, and freight rates had reset at a lower level before bouncing back sharply following the pandemic.

A 69% fall is required

A stronger, more consolidated carrier sector was likely to be able to prevent rates falling to that level again, but even to get back to the rate levels seen between 1998-2014 would require a 69% fall from where they are now, said Mr Murphy. “With a rate decline ranging from -0.4% to -0.9% in percentage points per week, this implies the rate decline would take 18 months.” But this would require that rates fell as quickly as they had during the global financial crisis in 2008.

“If, however, the rate decline only matches the average seen over the past five periods, then a normalisation would take as much as 26 months,” he said. Should rates only decline at their slowest recorded rate, it could take as long as 30 months to return to the earlier base level. “Overall, the conclusion is very positive for carriers and less so for the shippers.”

Source: https://www.lloydsloadinglist.com/

LA-LB port fees starting to chip away at gridlock

The plan for a stiff fee on long-dwelling containers at Southern California ports is becoming a so-called “nuclear option” in that it is so unpleasing to all sides that it is starting to break through a gridlock of competing interests. Container lines don’t want the burden of trying to pass the port tariffs onto customers via surcharges, and shippers and consignees want to avoid surcharges levied by carriers as they attempt to recoup tariff costs. Terminal operators are under pressure from carriers to adjust operations to help get long-dwelling containers out of the truck gates.

Citing progress, the ports of Los Angeles and Long Beach on Monday postponed the implementation of the fee for the third time, pushing the date to Nov. 22. But there’s skepticism among carrier executives, marine terminals, and importers that the ports will actually follow through with the tariff on carriers. Container lines have said they would try to pass the fee onto shippers, some of which are asking maritime regulators to weigh in on whether they would fall under new Federal Maritime Commission (FMC) rules regarding when detention and demurrage is considered reasonable.

Nonetheless, the number of long-dwelling containers is falling, as the fee that starts at $100 per box and increases by that amount daily looms. The number of containers that have dwelled on terminals nine days or more fell at Long Beach by 32 percent, to 19,276, between Nov. 1 and Nov. 16. For containers moving via on-dock rail ramps, the number of containers dwelling six days or more plunged 67 percent, to 537. During the first half of November, the port of Los Angeles saw the number of import containers at the terminal for nine days or more drop 57 percent, to 26,893. The number of total import containers at LA terminals declined nearly 19 percent to 70,985 during the same period.

Should the tariff go into effect, container lines will try to pass it onto shippers, but there's no guarantee they'll be able to fully pass on the charges. The billing hassle and possible legal challenges to implementing surcharges would only add more to carriers' plates. As a result, carriers are putting pressure on marine terminals to make imports more available, accept more empty containers, and deploy sweeper ships to pick up empties. In a Tuesday press conference, Gene Seroka, executive director of the Port of Los Angeles, said carriers have sent six sweeper vessels to pick up 17,000 TEU of empty containers and three more are in route to pick up approximately 2,500 containers. There are still some 65,000 empty containers at LA terminals alone, he said.

<u>Prioritizing local delivery</u>

For their part, marine terminals have their own operating methodology guiding when to focus on the priorities of their carrier customers rather than facilitating local delivery of import containers for cargo owners and consignees, said Ron Widdows, president of FlexiVan Leasing and the former head of Neptune Orient Lines. The decisions of terminal operators on what to prioritize is beyond the control of shippers, he said. "There's a constituency of players there that has some opportunity if motivated to think differently about how they operate, adjust in these usual circumstances, and you begin to see some of that as pressure has been ratcheted up," said Widdows, who was chairman of the World Shipping Council, which represents to top container lines.

The port tariffs, if implemented, could be challenged by the Federal Maritime Commission's Bureau of Enforcement, the container lines, or the importers and consignees. The National Industrial Transportation League (NITL) has urged the FMC to clarify whether any surcharges from carriers passed onto shippers would be subject to the agency's interpretative rulemaking on detention and demurrage. Container lines have asked the FMC to hold off until the fees are assessed, noting that the ports may not ultimately implement them.

In a Wednesday interview, FMC Chairman Daniel Maffei said that while the details of the port tariffs may be problematic, they were working to clear long-dwelling containers out of marine terminals.

"Speaking for myself and not necessarily the FMC as a whole, it would be a mistake for the carriers to assume that a Los Angeles/Long Beach dwell fee can always be passed on to the shipper without violating the Shipping Act," Maffei told JOC.com. "I can think of many potentialities where a port authority could bill a carrier and it be considered reasonable, but the carrier then passing on the fee would not be reasonable. Examples might include when a container was tendered prior to a port announcing a fee and when the pass-through charge does nothing to incentivize the shipper moving the cargo."

<u>The reasonableness of demurrage</u>

Shippers argue that passing through the surcharges to recoup the tariffs could violate the agency's interpretive rulemaking that fees are only reasonable if they incentivize the timely retrieval of cargo and return of equipment. In a Nov. 3 letter to the FMC, NITL Executive Director E. Nancy O'Liddy said many shippers can't avoid these fees — if passed on to them by the carriers — because they are unable to pick up their containers due to lack of chassis and terminal appointments and aren't able to return empty containers.

Illustrating the complexity of the gridlock, consider marine terminals' so-called closed sections of the container yard, which operators use as a staging ground before containers are moved to the open areas where truckers can pick them up. Those closed areas have helped terminal operators manage 16 months of record or near-record volumes hitting the docks while preventing the overall terminal to become too packed. Yet, importers and consignees say they cannot access containers in such closed sections. They add marine terminals often refuse to receive empty containers unless truckers can match them with laden import containers on the same trip. Drayage truckers, consignees, and shippers argue that they should not have to pay demurrage fees on containers in closed sections, since they are not accessible.

FMC Commissioner Rebecca Dye on Wednesday announced that she and a team of port stakeholders will identify and implement ways to help more truckers return a container and pick-up another, commonly known as a “double move.” The six Supply Chain Innovation Teams will also look at how to increase certainty and predictability to exporters’ return of empty containers. Dye is acting under her Fact Finding 29 authority to investigate how detention and demurrage is billed in Southern California and the Port of New York-New Jersey.

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

ตารางสรุปอัตราค่าระวางจากเอเชียไปเส้นทางต่างๆ อ้างอิงจาก Shanghai Containerized Freight Index (SCFI)
Source: http://en.sse.net.cn/indices/scfinew.jsp

Shanghai Containerized Freight Index (SCFI)				
Description	Unit	Weighting	Previous Index 12 Nov 2021	Current Index 19 Nov 2021
Comprehensive Index			4554.04	4555.21
Service Routes				
Europe (Base port)	USD/TEU	20%	7560	7552
Mediterranean (Base port)	USD/TEU	10%	7207	7234
USWC (Base port)	USD/FEU	20%	6730	6730
USEC (Base port)	USD/FEU	7.50%	10589	10415
Persian Gulf and Red Sea (Dubai)	USD/TEU	7.50%	3361	3338
Australia/New Zealand (Melbourne)	USD/TEU	5.00%	4452	4445
East/West Africa (Lagos)	USD/TEU	2.50%	7608	7499
South Africa (Durban)	USD/TEU	2.50%	6564	6487
South America (Santos)	USD/TEU	5.00%	10131	10135
West Japan (Base port)	USD/TEU	5.00%	321	318
East Japan (Base port)	USD/TEU	5.00%	308	305
Southeast Asia (Singapore)	USD/TEU	7.50%	978	1010
Korea (Pusan)	USD/TEU	2.50%	340	339

สรุปรายงานประจำสัปดาห์ พบว่าปริมาณความต้องการส่งออกจากจีนอยู่ในระดับาสูง ในขณะที่ค่าระวางคงที่ สำหรับเส้นทางยุโรป พบว่ามีความต้องการนำเข้าสินค้าหลายประเภทอยู่ในระดับสูง ในขณะที่ Supply ตู้สินค้ายังคงที่ แต่ปัญหาเรื่องความหนาแน่นในท่าเรือยังคงมีอยู่อย่างต่อเนื่อง ส่วนเส้นทางสหรัฐอเมริกา พบว่าปริมาณการขนส่งยังคงมีความต้องการในระดับสูงสำหรับสินค้าหลากหลายประเภท รวมถึงอุปกรณ์ป้องกันไวรัส ในขณะที่ประสิทธิภาพการจัดการเรื่องการหมุนเวียนตู้ยังคงไม่ดีนัก รวมถึงปัญหาความหนาแน่นภายในท่าเรือ ซึ่งทำให้ระบบซัพพลายเชนในท่าเรือขาดประสิทธิภาพ ในขณะที่เส้นทางออสเตรเลีย พบปัญหาขาดแคลนแรงงาน ในขณะที่มีความต้องการในการขนส่งในปริมาณสูง ส่วนเส้นทางญี่ปุ่นพบว่า โดยทั่วไปปริมาณการขนส่ง และอัตราค่าระวางอยู่ในระดับคงที่ และสุดท้ายเส้นทางอเมริกาใต้ เนื่องจากตัวเลขการแพร่ระบาดยังคงมีปริมาณสูง ความต้องการนำเข้าสินค้าจำเป็น และอุปกรณ์ทางการแพทย์ยังคงมีจำนวนมากเช่นที่ผ่านมา ซึ่ง Demand และ Supply ยังคงอยู่ในระดับตึงตัว
