

THE HONG KONG SHIPPERS' COUNCIL

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Circular No. HKSC - 3980

Date: 30 November 2022

Shipping Alert 12

(航運提示 12)

Sea freight rates have been “cliff-falling” in the last few months

Hong Kong shippers should note that sea freight rates have been “cliff-falling” in the last few months. Intelligence from market indicates that freight rates in some markets (such as to U.K. ports) have dropped through the pre-pandemic levels to “hard-to-believe” levels.

Various freight indices confirmed the rapid falling trends. Shippers should monitor the market closely and cross-check quotations to ensure the quotations they receive are updated and up to market levels.

While demand for shipping space is shaky and that a large number of new ships are due for delivery in 2023 and 2024, there would be ample surplus capacity in the market. Shippers should stay alert and maintain sufficient flexibility in the choice of contract rates and spot rates in the market.

海運費用在過去數個月出現“斷崖式”下跌

付貨人須注意海運費用在過去數個月出現“斷崖式”下跌。消息指部分貨運市場(如出口往英國港口)，海運費用已跌穿疫情前水平，到達“難以置信”的水平。

下列各項運費指數反映了運價快速下跌的趨勢。付貨人應密切留意市場運費走勢，並比較更多報價，以確保他們收到的報價與市場相符。

貨運船位需求預期下跌，而大量新貨櫃船將於 2023 年和 2024 年交付，市場將有充裕的剩餘運力。付貨人應保持警惕，並在市場上選擇合約運費和即時運費時保持足夠的靈活性。

運價跌回起漲點！集運市場春節前小旺季泡湯

https://www.sofreight.com/news_62814.html

歐洲線傳貨櫃船運價止跌 上周五續探底、每大箱最低 1500 美元

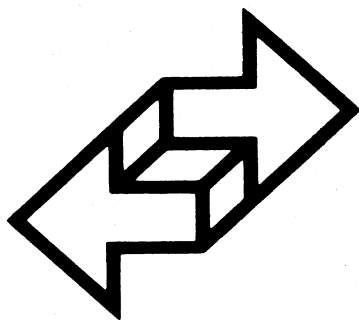
<https://finance.ettoday.net/news/2389576>

貨櫃海運價格暴跌 7-8 成

<https://zh.cn.nikkei.com/politicaeconomy/commodity/50426-2022-11-08-09-48-25.html>

Freight rates and port congestion to continue decline into 2023

<https://www.freshfruitportal.com/news/2022/11/08/freight-rates-and-port-congestion-to-continue-decline-into-2023/#:~:text=Prices%20of%20shipping%20containers%20have,to%20drop%2C%20the%20outlet%20reports.>



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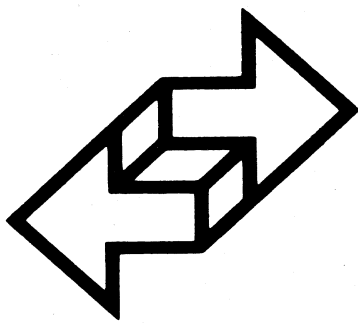
Shanghai (Export) Containerized Freight Index based on Settled Rates (EUR service)



Shanghai (Export) Containerized Freight Index based on Settled Rates (USWC service)



Source: Shanghai Shipping Exchange



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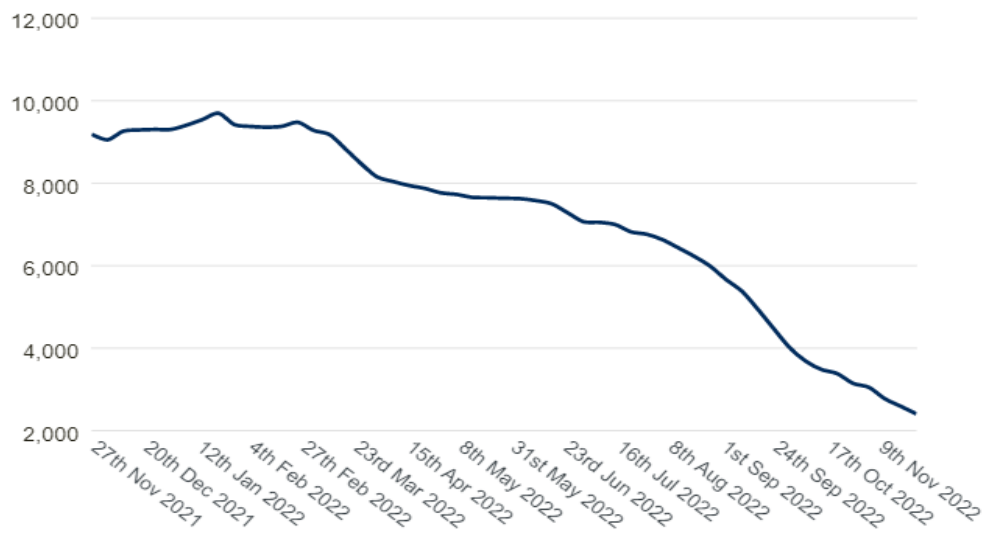
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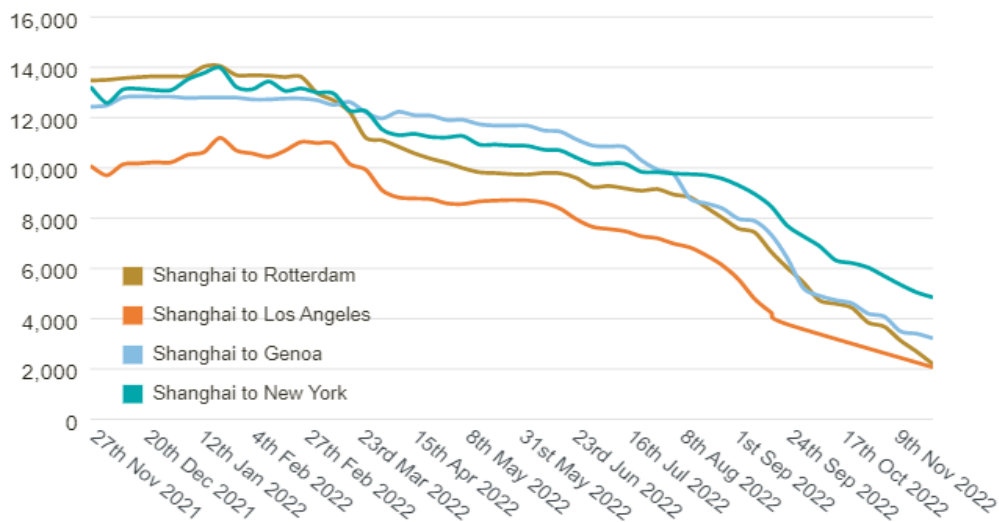
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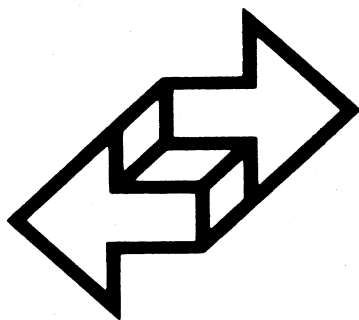
Drewry World Container Index - 24 November 22 (US\$/40ft)



Trade Routes from Shanghai (US\$/40ft)



Source: World Container Index, Drewry Supply Chain Advisors



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Spot freight rates by major route

Our assessment across eight major East-West trades:

Route	10-Nov-22	17-Nov-22	24-Nov-22	Weekly change (%)	Annual change (%)
Composite Index	\$2,773	\$2,591	\$2,404	-7% ▼	-74% ▼
Shanghai - Rotterdam	\$3,126	\$2,687	\$2,192	-18% ▼	-84% ▼
Rotterdam - Shanghai	\$867	\$840	\$819	-3% ▼	-48% ▼
Shanghai - Genoa	\$3,494	\$3,404	\$3,221	-5% ▼	-74% ▼
Shanghai - Los Angeles	\$2,262	\$2,130	\$2,069	-3% ▼	-79% ▼
Los Angeles - Shanghai	\$1,186	\$1,184	\$1,184	0%	-8% ▼
Shanghai - New York	\$5,351	\$5,045	\$4,846	-4% ▼	-63% ▼
New York - Rotterdam	\$1,318	\$1,322	\$1,321	0%	11% ▲
Rotterdam - New York	\$7,336	\$7,363	\$7,224	-2% ▼	16% ▲

Source: Drewry Supply Chain Advisors

For inquiry:

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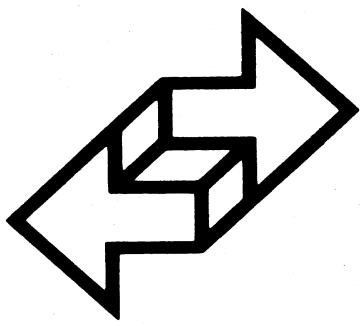
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Circular No. HKSC - 3973

Date: 27 September 2022

Shipping Alert 11

(航運提示 11)

(1) Ocean freight rates are “cliff-diving”

Ocean freight rates are reported to be “cliff-diving” in the past two weeks. The current rates in the spot market are reported to be close to the pre-pandemic levels. Shippers please pay attention to the latest development.

海運費用“斷崖式”下跌

消息指過去兩週海運費用出現“斷崖式”下跌，現貨市場運費甚至跌近疫情前水平。付貨人須留意最新發展。

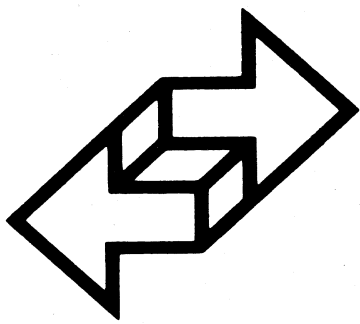
Shanghai (Export) Containerized Freight Index based on Settled Rates (EUR service)



Shanghai (Export) Containerized Freight Index based on Settled Rates (USWC service)



Source: Shanghai Shipping Exchange



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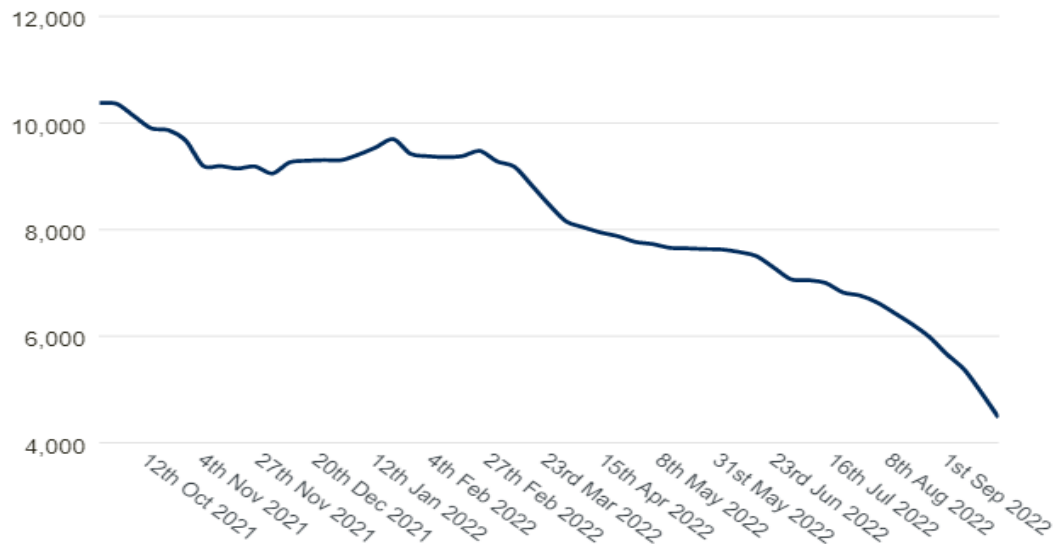
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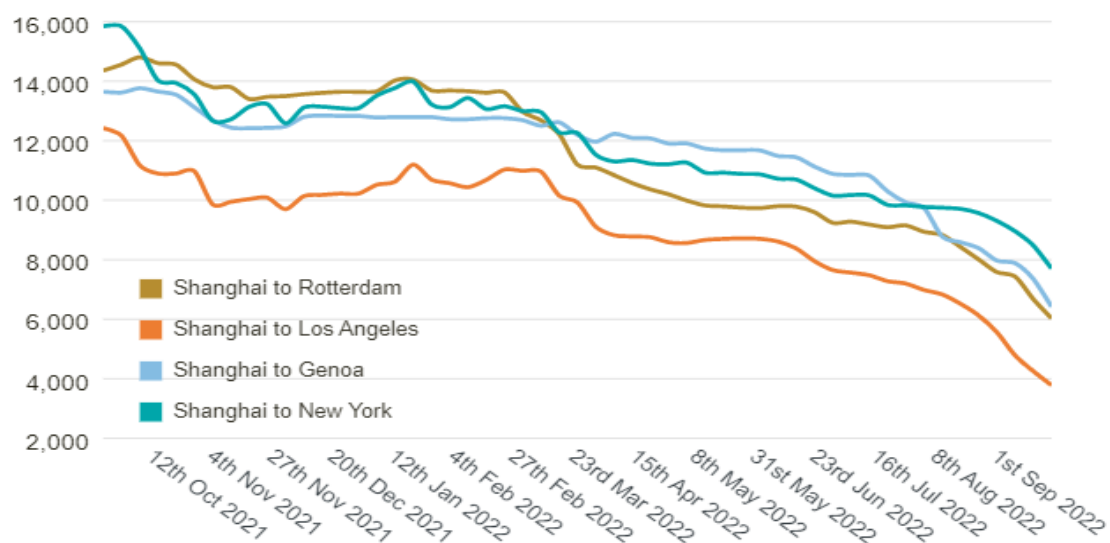
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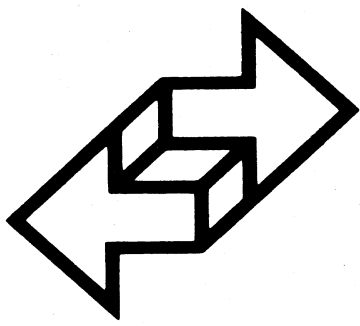
Drewry World Container Index - 22 September 22 (US\$/40ft)



Trade Routes from Shanghai (US\$/40ft)



Source: World Container Index, Drewry Supply Chain Advisors



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Spot freight rates by major route

Our assessment across eight major East-West trades:

Route	8-Sep-22	15-Sep-22	22-Sep-22	Weekly change (%)	Annual change (%)
Composite Index	\$5,379	\$4,942	\$4,472	-10% ▼	-57% ▼
Shanghai - Rotterdam	\$7,435	\$6,671	\$6,027	-10% ▼	-58% ▼
Rotterdam - Shanghai	\$1,082	\$1,059	\$1,006	-5% ▼	-38% ▼
Shanghai - Genoa	\$7,884	\$7,353	\$6,419	-13% ▼	-53% ▼
Shanghai - Los Angeles	\$4,782	\$4,252	\$3,779	-11% ▼	-70% ▼
Los Angeles - Shanghai	\$1,260	\$1,260	\$1,282	2% ▲	-9% ▼
Shanghai - New York	\$8,957	\$8,477	\$7,701	-9% ▼	-51% ▼
New York - Rotterdam	\$1,279	\$1,282	\$1,255	-2% ▼	13% ▲
Rotterdam - New York	\$6,688	\$6,607	\$6,737	2% ▲	9% ▲

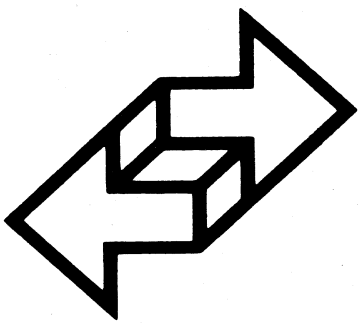
Source: Drewry Supply Chain Advisors

Global Ocean Freight Rates Fall Off A Cliff

<https://www.tkingauto.com/news/global-ocean-freight-rates-fall-off-a-cliff-61301192.html>

Fall in container spot rates 'much steeper,' 'less orderly' than expected

<https://www.freightwaves.com/news/container-spot-rate-fall-much-steeper-and-less-orderly-than-expected>



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(2) More “blank sailings” are reported

Prompted by port congestions and attempts to save cost, more blank sailings are reported. Shippers please keep close track of ship schedules.

取消航班趨增

因受港口擠塞和節省成本，船公司取消航班趨增。付貨人須密切留意貨運船期。

Sea-Intelligence: Carriers are Increasing Blank Sailings in October

<https://maritime-executive.com/article/carriers-increasing-blank-sailings-in-october-reports-sea-intelligence>

Peak season fails to materialise, blank sailings leap

<https://hkshippers-prod-1257612064.file.myqcloud.com/media/files/room/20220927/4a87036943b086ae56fb08e962efd1a8.pdf>

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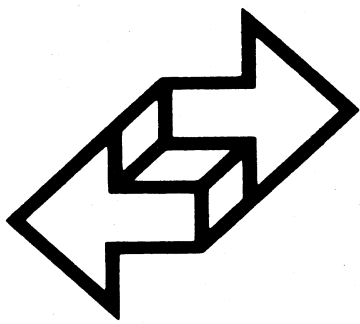
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Date: 1 September 2022

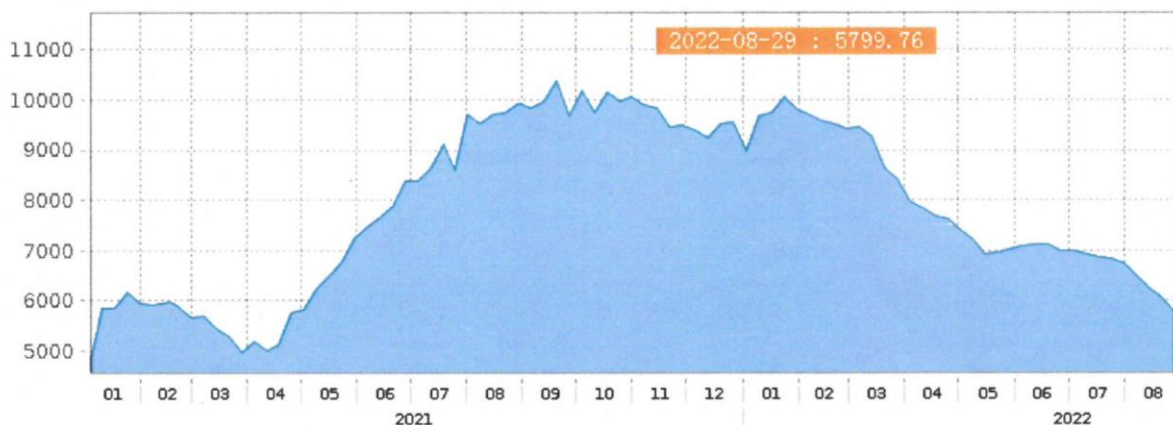
Shipping Alert 10

Shippers should note the following two market developments

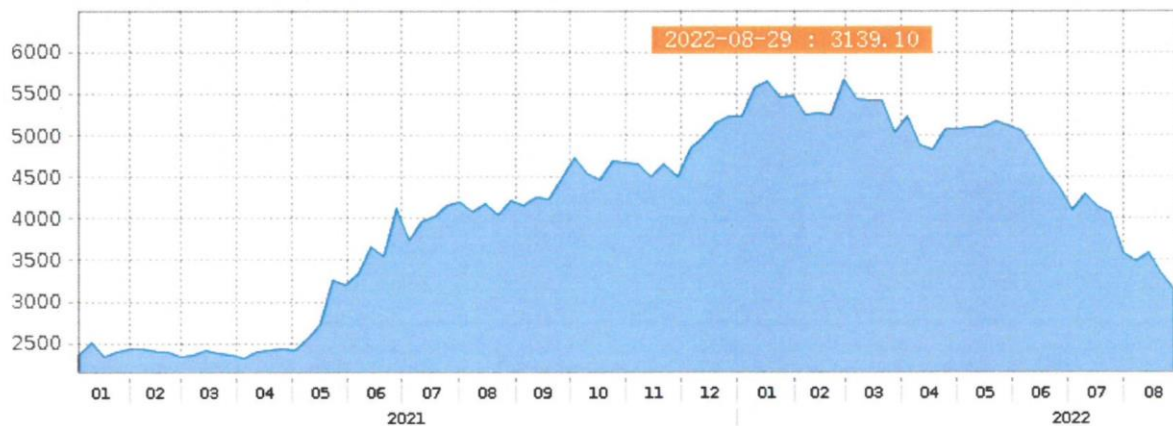
(1) Freight Rates Are Dropping Quickly

Freight index are showing rapid downward trends. Shippers should ensure that they would not be overcharged.

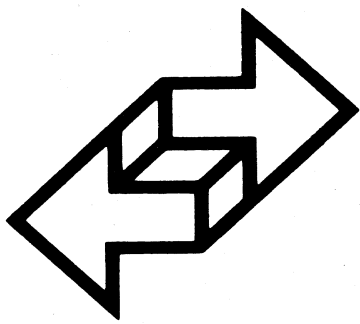
Shanghai (Export) Containerized Freight Index based on Settled Rates (EUR service)



Shanghai (Export) Containerized Freight Index based on Settled Rates (USWC service)



Source: Shanghai Shipping Exchange



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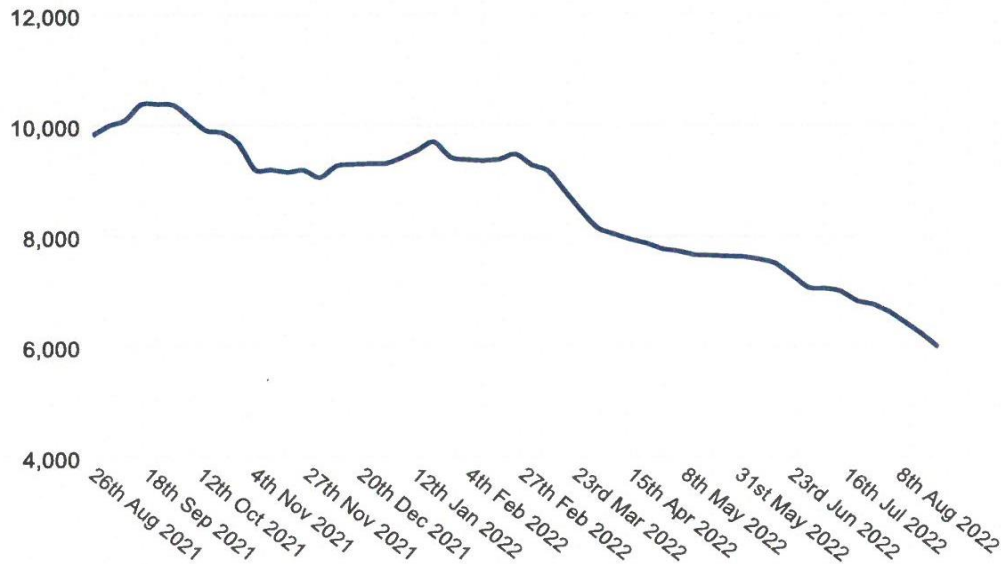
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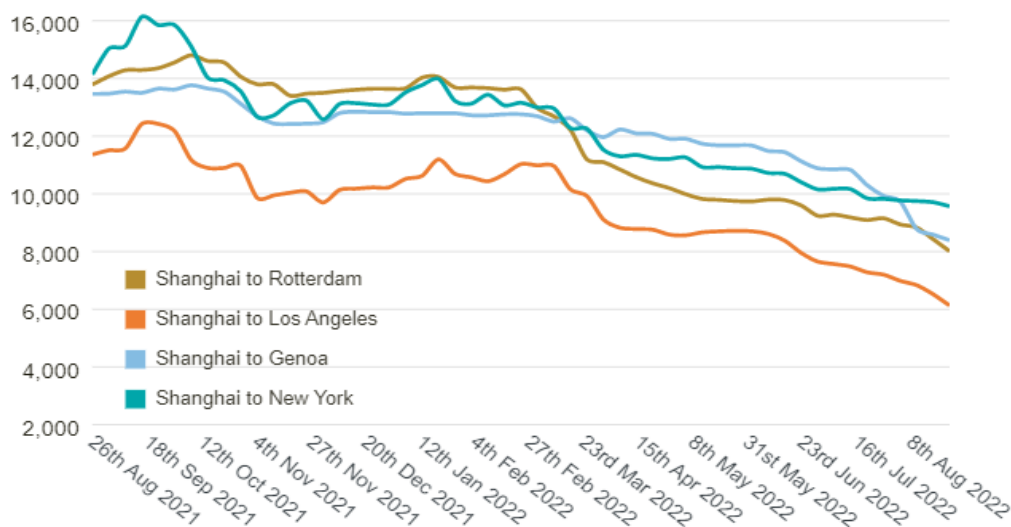
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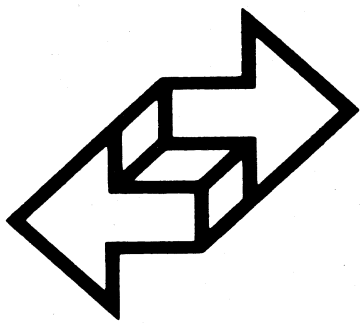
Drewry World Container Index - 25 August 22 (US\$/40ft)



Trade Routes from Shanghai (US\$/40ft)



Source: World Container Index, [Drewry Supply Chain Advisors](#)



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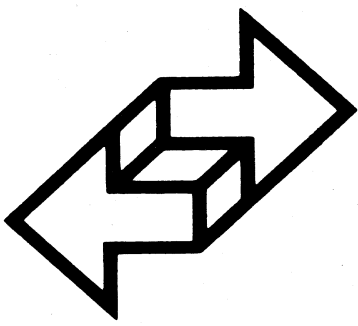
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Spot freight rates by major route

Our assessment across eight major East-West trades:

Route	11-Aug-22	18-Aug-22	25-Aug-22	Weekly change (%)	Annual change (%)
Composite Index	\$6,430	\$6,224	\$5,986	-4% ▼	-39% ▼
Shanghai - Rotterdam	\$8,833	\$8,430	\$8,010	-5% ▼	-42% ▼
Rotterdam - Shanghai	\$1,195	\$1,187	\$1,190	0%	-28% ▼
Shanghai - Genoa	\$8,779	\$8,587	\$8,391	-2% ▼	-38% ▼
Shanghai - Los Angeles	\$6,834	\$6,521	\$6,127	-6% ▼	-46% ▼
Los Angeles - Shanghai	\$1,258	\$1,253	\$1,254	0%	-10% ▼
Shanghai - New York	\$9,749	\$9,710	\$9,569	-1% ▼	-32% ▼
New York - Rotterdam	\$1,290	\$1,298	\$1,278	-2% ▼	12% ▲
Rotterdam - New York	\$6,945	\$6,936	\$6,922	0%	7% ▲

Source: Drewry Supply Chain Advisors



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(2) Supply Chains Disrupted Further

Several major factors account for the worsening situations:

a. Sales slow down and inventory is building up, clogging the supply chains

U.S. business inventories rise strongly; sales slow

<https://www.reuters.com/business/us-business-inventories-rise-strongly-sales-slow-2022-06-15/>

b. Industrial actions (worker strikes) in ports and other sector of the transport industry

Felixstowe Port Strike Already Threatens Christmas

<https://gcaptain.com/felixstowe-port-strike-already-threatens-christmas/>

Felixstowe port strike: Union warns of further action

<https://www.bbc.com/news/uk-england-suffolk-62713971>

US port congestion set to worsen as rail and truck strikes loom

[US port congestion set to worsen as rail and truck strikes loom - Tandem Global Logistics](#)

Maersk shifting Vancouver calls due to congestion

<https://www.insidelogistics.ca/transportation/ocean/maersk-shifting-vancouver-calls-due-to-congestion-182403/>

c. Fuel price surge sharply

Oil Rises to Highest in a Month Amidst Global Energy Crunch

<https://www.bloomberg.com/news/articles/2022-08-28/oil-eases-at-week-s-open-after-top-central-banks-warn-on-rates>

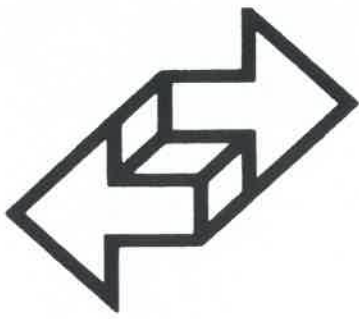
Shippers should keep alert of changes and have alternative logistics plans.

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Circular No. HKSC - 3967

Date: 6 July 2022

The 9th Shipping Alert

Shippers should note that Freight Rates are dropping fast

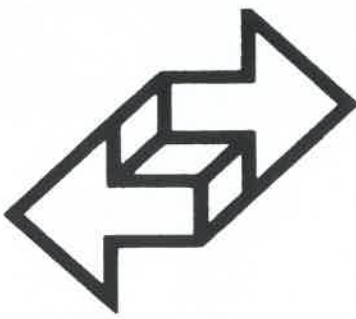
- (1) Shippers should note that sea freight rates are dropping fast lately, reflecting a rapidly weakening market.
- (2) Most container freight index show freight rates have dropped over 30% from early 2022 to June 2022, and outlook is not positive (charts attached).
- (3) Hong Kong shippers are advised to monitor the market closely, cross check the rates with different service providers to ensure competitive rates are offered.
- (4) Performance of global economy and COVID-19 developments are key factors for future market changes.

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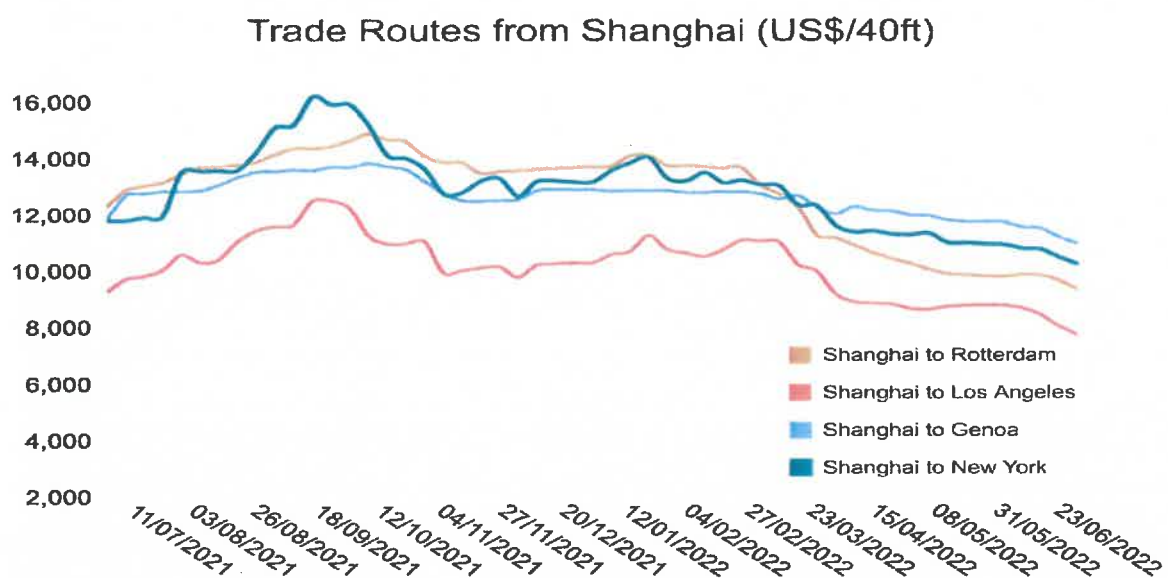
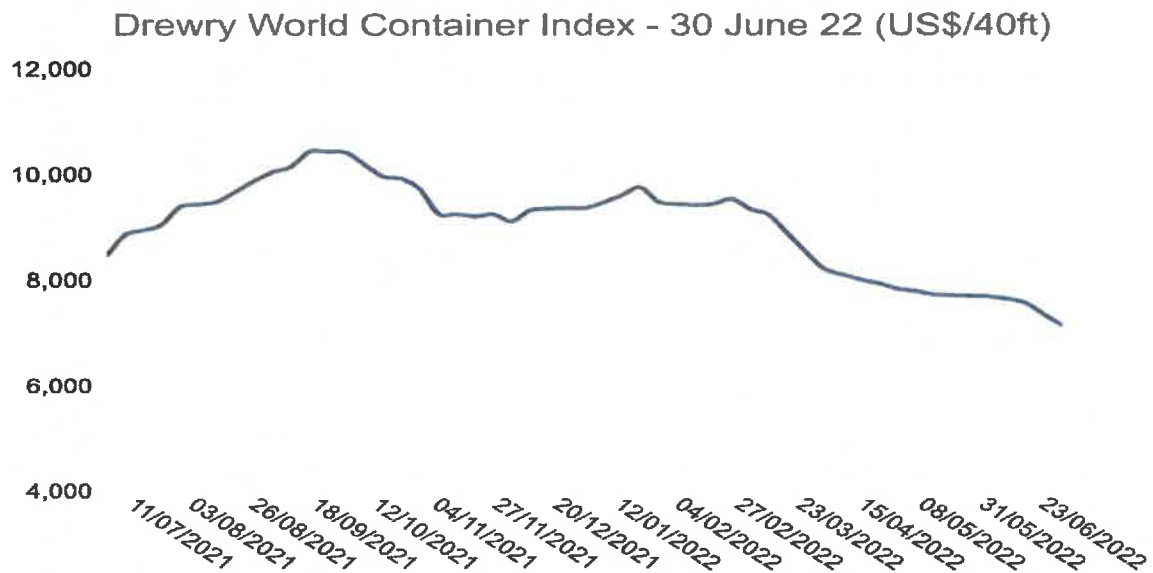
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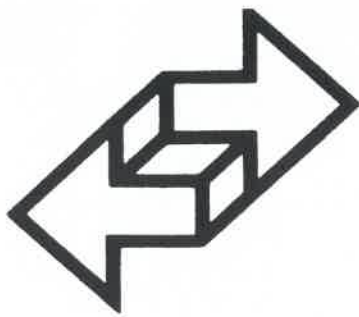
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World Container Index - 30 Jun

Drewry's composite World Container Index decreased by 3% to \$7,066.03 per 40ft container this week.



Source: World Container Index, Drewry Supply Chain Advisors



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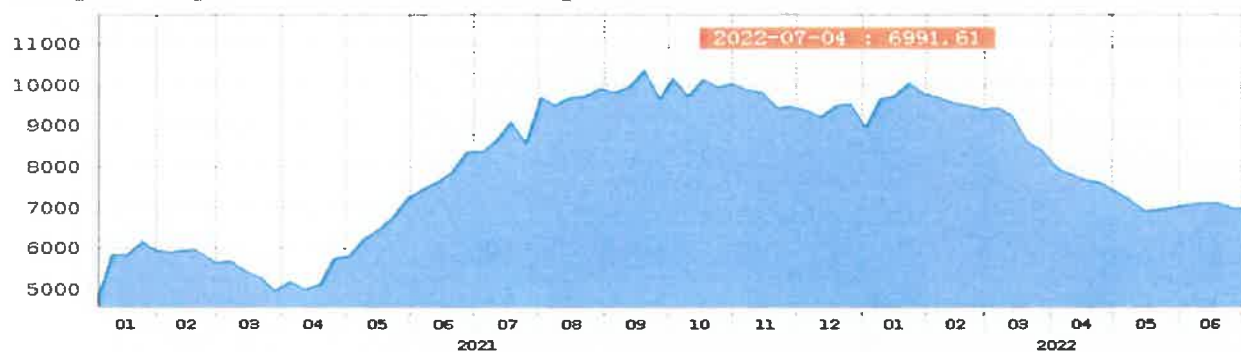
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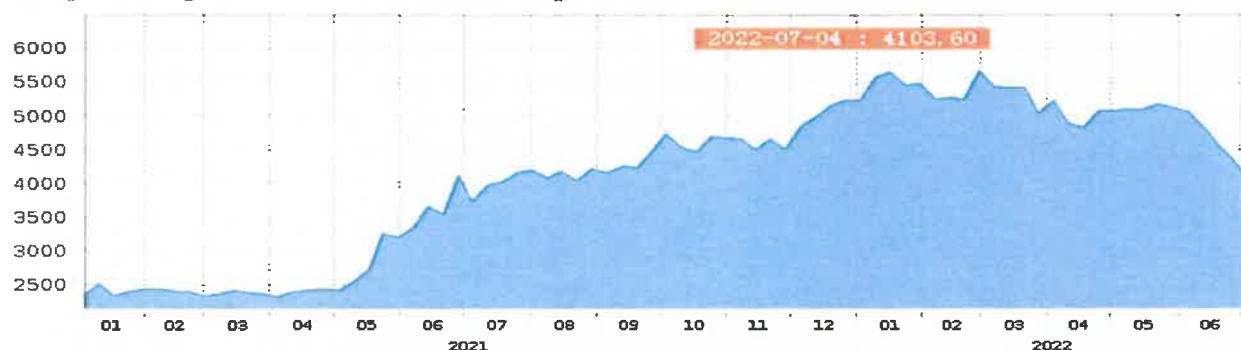
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Shanghai (Export) Containerized Freight Index based on Settled Rates (EUR service)

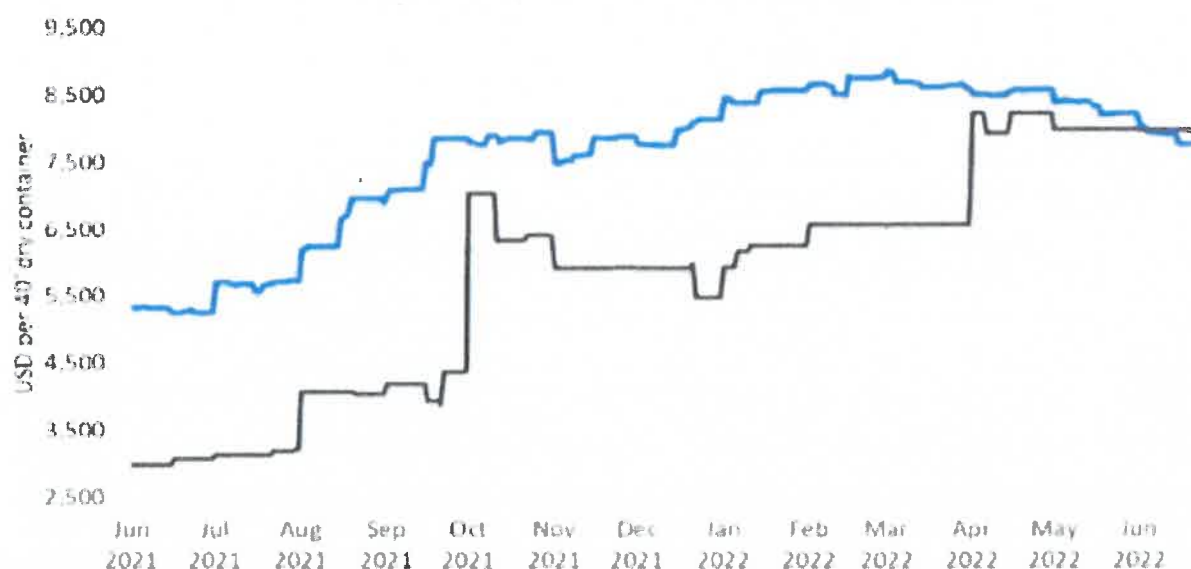


Shanghai (Export) Containerized Freight Index based on Settled Rates (USVC service)



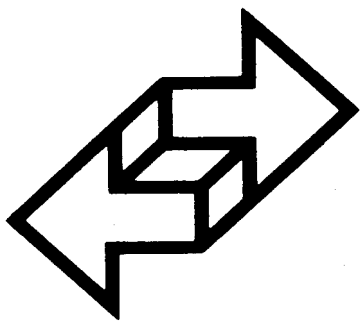
Source: Shanghai Shipping Exchange

Container freight rates, China to US West Coast, 2021-2022



Source: www.Xeneta.com

— Short term rates — Long term rates



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Circular No. HKSC - 3959

日期: 2022 年 3 月 14 日

致：付貨人

航運提示 8

付貨人請注意深圳及珠江三角洲因防疫最近安排引致的物流影響

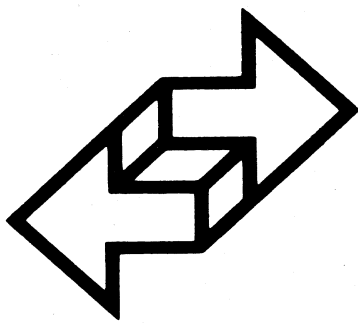
因疫情關係，深圳市政府決定封城進行全民檢測。有關貨運安排，據了解，深圳各貨櫃碼頭仍然正常運作，但物流公司主要倉庫及集運點均停止交收貨物。同時，雖然部分公司仍維持市外衛星倉運作，但陸路運輸交通亦大受阻礙，操作將有延誤。跨境陸路運輸亦影響嚴重，來港轉運貨物，包括空運貨都會受到影響。付貨人應與運輸公司及物流公司緊密聯絡，了解最新情況，及早作出貨運延誤的準備和安排。

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Circular No. HKSC - 3952

Date: 17 February 2022

航運提示 7

付貨人需留意跨境陸路貨運最新情況

需要跨境陸路運輸服務的付貨人請注意，內地就抗疫情況，對跨境陸路運輸實行新措施，付貨人應及早作出應對安排。

1. 內地很多貨物操作點，包括工廠、貨場、倉庫等的編碼會被取消，香港陸路跨境汽車將無法直接前往原操作點收貨或送貨。出口貨物將由內地貨車送往中轉倉或中轉場，轉交香港跨境貨車運送到香港。入口貨物則由香港跨境貨車在中轉倉或中轉場轉交內地貨車送至目的地。出口及入口貨櫃亦會在中轉倉或中轉場進行轉運。這安排是杜絕香港司機與內地人員有任何實體接觸的機會。
2. 因操作點數目大減，如假期後貨量增加，預約及進出中轉倉或中轉場可能並不十分暢順，付貨人須注意及作出適當安排。
3. 此外，付貨人須留意中轉倉或中轉場的所在位置，以及是否可用等。中轉倉或中轉場亦可能因發現疫情而突然封閉，付貨人須密切留意。
4. 付貨人亦需留意跨境及內地陸路運輸服務供應緊張問題。因春節假期及疫情關係，跨境及內地司機供應仍然短缺，付貨人應及早與貨運公司作出安排。
5. 跨境陸路運輸困難情況可能會持續。付貨人應考慮更多運輸模式，包括海運等，保持靈活性。

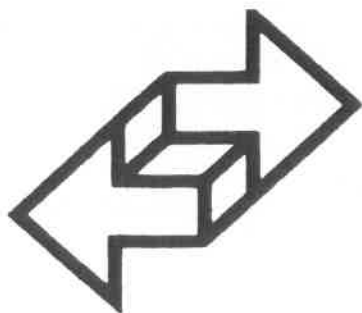
香港付貨人委員會 謹祝付貨人 虎年萬事暢達，安全順意！

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29 November 2021

Circular No: M-749

The 6th Shipping Alert

Hong Kong importers and exporters should prepare for a sharp reduction in Pearl River Delta feeder services from end December 2021 to February 2022. Since crew members would be subject to 28-days quarantine after the feeder call at Hong Kong, it is known that many feeder services would be cancelled, or substantially reduced.

Importers and exporters should plan alternative shipping arrangements. Importers and exporters should note as well that cross-boundary trucking services before Chinese New Year would usually be very tight and with price increases.

Importers and exporters are advised to effect their shipments early instead of waiting to the last minute.

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M-749 (中文版)

2021 年 11 月 29 日

航運提示 6

香港出入口商須注意由今年 12 月底至明年 2 月，珠江三角洲駁船班次會大幅下降，這是由於船員在駁船抵達香港後回內地須接受 28 天強制檢疫，因此來往香港至珠江三角洲的駁船服務將會取消，或大幅減少。

因此出入口商須考慮其他貨運安排，並須注意在農曆新年前跨境陸運服務一般都很緊張，及費用會上調。

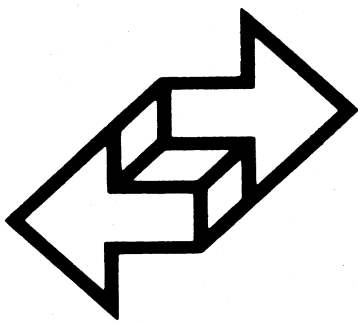
我們建議出入口商安排儘早發貨，以免貨運延誤。

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13 August 2021

Shipping Alert 5

Shippers should take precautionary actions for shipping through Ningbo-Zhoushan ports

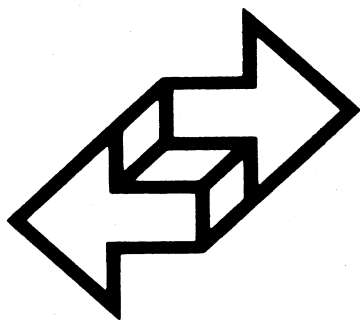
1. A worker at Ningbo Meidong Container Terminal, tested positive for COVID-19 on 10th August 2021. There were other 10 suspected cases.
2. The Ningbo Meidong terminal suspended operations, including gate and shoreside from 03:30, 11th August 2021.
3. Shipping lines have announced schedule changes and cancellation of sailings.
4. Some sailings have been diverted to other terminals in Ningbo, but many have been cancelled.
5. While the full impact depends on development of the case, because quick actions to contain the development have been taken, the full impact is expected to be less severe than the closure of Yantian Port in late May/June.
6. Shippers shipping through Ningbo-Zhoushan should take full alert of the incident. Many sailings would be cancelled, container exports might encounter difficulties, inbound containers might be diverted, and delays could be expected, and empty containers supply would be further restricted.
7. Shippers please liaise closely with their shipping lines and freight forwarders to avoid difficulties.

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2021 年 8 月 13 日

航運提示 5

經寧波-舟山港付運貨物的付貨人須採取預防措施

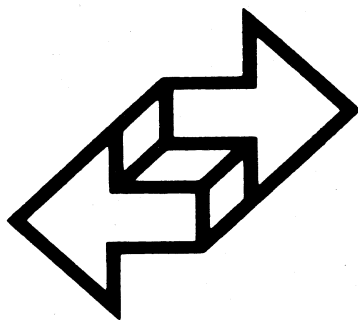
1. 寧波梅東貨櫃碼頭一名工人於 2021 年 8 月 10 日確診感染新冠病毒，另外還有 10 宗疑似病例。
2. 寧波梅東貨櫃碼頭自 2021 年 8 月 11 日 03:30 起關閉，包括閘口和岸邊操作。
3. 船公司已宣布船期變動及取消航班。
4. 部分航班已轉至寧波其他碼頭，但更多航班已被取消。
5. 雖然該貨櫃碼頭關閉的全面影響仍是未知之數，但由於當局已迅速採取行動，預計其影響不會像 5 月和 6 月下旬鹽田港關閉般嚴重。
6. 經寧波舟山港付運貨物的付貨人須高度警惕，因為多個航班取消或會導致貨櫃出口困難、進口貨櫃會分流或延誤，吉櫃供應會更形緊絀。
7. 付貨人請與船公司和貨運代理保持密切聯繫，以減低貨運困難。

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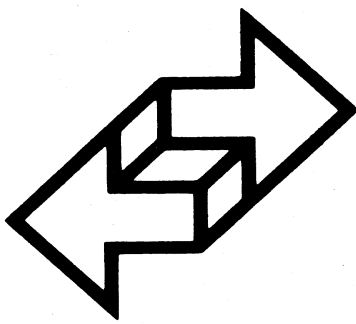
1 June 2021

Circular No. M-744

The 4th Shipping Alert

A. Shippers should be alerted of the following developments:

1. Shipping reliability and predictability are deteriorating rapidly and are expected to linger on
 - a. Shippers should note that congestions at world's major ports deteriorate rapidly. Many origin, destination, and transshipment ports, including ports in North America, Europe and Asia, are suffering from serious congestions and operations disruptions. This is caused by lock-down/partial lock-down of major cities; ports, trucking and distribution center operations disruptions; bad weather; shipping lines' schedule disruptions and decisions to roll over containers; industrial (labor) issues at some ports; amongst others factors.
 - b. Shippers should also note that blank sailings and cargo roll-overs have substantially increased. Blank sailings refer to skipping of ports or the whole services, and cargo roll-over means laden containers are being left over at origin and transshipment ports without being loaded onto the booked/intended vessels. It is reported as many as 60% of the containers are being short shipped in April and the percentages are trending upwards. (Note 1)
 - c. Shipping lines' performances vary with regards to the above. Shipping lines like Maersk and MSC/CMA that are able to provide more sailings and wider networks are said to be able to perform better as far as alternative/remedial measures are concerned.
 - d. Container shortage will continue to trouble shippers because turn-around of containers are worsen by the port congestions and schedule disruptions. It is known that shipping lines are also having very tough negotiations with container leasing companies and container manufacturers, and hence there are no prompt and easy solutions. It is known the latter two are demanding tough terms. In this regards, minor cargo origin ports are going to suffer more than the major ports because shipping lines are giving priorities to the latter. Shippers shipping in and out of ASEAN and South Asian ports would have to spend more efforts in shipping arrangements.
 - e. Shippers will have to live with poor shipping reliability and predictability for some times.



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2. Freight rate volatility is worsening

- a. Shipping lines will continue to exploit the market situation to maximize profit. Shipping lines are reported to be providing less space allocation to contracted cargoes, and more to spot cargo and those cargoes that shipping lines can collect high surcharges (such as space guarantee surcharge). Decisions to load, or roll-over cargoes are often made at last minutes, contributing to further uncertainties.
- b. Shipping lines are jacking up both spot rates and contract rates. Spot rates are pushed up further by rejection of bookings, increase of blank sailings, cargo roll-over, and through imposing surcharges. At the same time, shipping lines have announced substantial General Rate Increases (GRIs), and high intended contract rates.
- c. As shipping lines are adjusting their allocations of space for contracted cargo and spot cargo, shippers are indeed making similar arrangements. These actions contribute to further volatility in the market.
- d. Some critics refer the phenomenon to demise of the shipping contract system. While we may not see the whole system collapses, further freight volatility is unavoidable.

B. What shippers should do:

1. Avoid shipping responsibilities when making deals

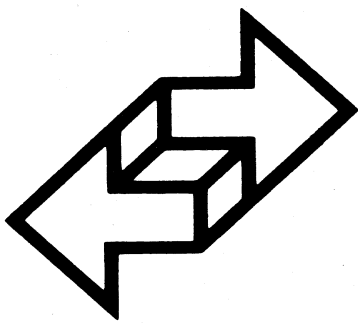
As there are high uncertainties over freight rates and shipping time schedules, shippers should avoid acceptance of shipping responsibilities as far as possible. For exporters, this can be achieved through use of Incoterms including Ex-works; Free Carrier (FCA), Free-on-board (FOB), etc. and avoid Cost and Freight (CFR), Cost, Insurance and Freight (CIF), Delivered at Place (DAP), Delivered Duty Paid (DDP), etc.

2. Review the list of carriers/service providers

It might be necessary for shippers to review or expand its list of carriers and service providers. Shippers should develop a strategy over risk diversifications and mitigations.

3. Develop a strategy over contract and spot cargo

As service contracts may not be able to provide the shipping certainty as in the past, shippers might need to develop a new strategy over contract and spot cargo. It has been reported that shipper lately have been switching more towards spot market in order to effect shipments.



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4. Agree with carriers/service providers a performance evaluation system

It might be beneficial for shippers to come to agreements with their carriers/service providers on performance evaluation systems. The agreed system might help to gauge the performance of the carriers and service providers, as well as servicing as a constant reminder of their commitments to their clients. It is a good tool for business negotiations in case of changes of market situations.

5. Keep close contact with carriers/service providers, make early bookings and avoid making late changes

It is necessary for shippers to stay on top of the market. Therefore, please keep close contact with your carriers and service providers, make bookings early such as 14 to 21 days in advance, and avoid late changes – in bookings, operations and documents.

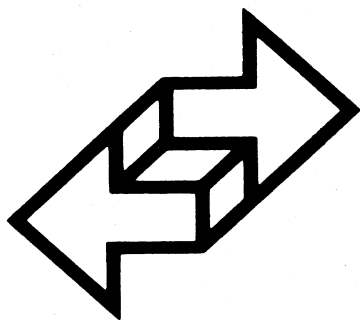
Note 1: “By Paul Kelly in News, Sea, Supply Chain Posted May 25, 2021 at 11:23am”

For inquiry:

The Hong Kong Shippers' Council – Mr. Sunny Ho

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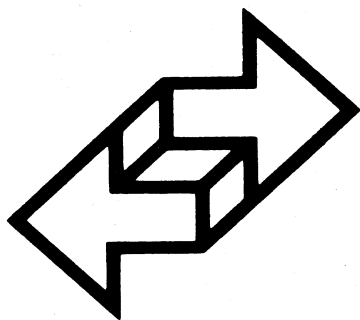
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2021 年 6 月 1 日

航運提示 4

A. 付貨人須注意以下最新發展：

1. 航運可靠性和可預測性正迅速惡化，並將會持續
 - a. 付貨人須注意，全球主要港口的堵塞情況正迅速惡化。許多發貨港、目的地港和轉運港，包括北美、歐洲和亞洲的港口都面臨嚴重的堵塞和運作受擾亂。這是由於很多主要城市實施封鎖/部分封鎖、港口、貨車運輸和配送中心運作受擾亂、惡劣天氣、船公司航班取消和貨櫃滯港的決定；與及部份港口的勞工問題等。
 - b. 付貨人還須注意航班取消和貨櫃滯港量大幅增加。航班取消指貨櫃船航班脫班或取消整個服務，貨櫃滯港是指載貨貨櫃被滯留在發貨港和轉運港，沒有裝上已訂/計劃的貨櫃航班。消息指，今年 4 月份多達 60% 的貨櫃延誤付運，這百分比呈上升趨勢。(註 1)
 - c. 船公司的表現出現差異。如馬士基和 MSC/CMA 等能夠提供更多航班和更廣闊網絡服務的船公司，被認為在作出應對補救措施方面表現更佳。
 - d. 由於港口堵塞和航班混亂加劇貨櫃周轉惡化的情況，貨櫃短缺將繼續困擾付貨人。眾所周知，船公司與貨櫃租賃公司和貨櫃製造商的談判也十分艱鉅，因此這問題沒有快捷和簡單的解決方案。後兩者要求非常苛刻的條款。在這方面，較次要的發貨港將較主要港口遭受更大的損失，因為船公司會優先考慮後者。付運貨物進出東盟和南亞港口的付貨人將在航運安排上花費更多的精力。
 - e. 因此，付貨人須適應與較差劣航運可靠性和預測性並存的常態。



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2. 運費波動加劇

- a. 船公司將繼續藉著市場形勢賺取最大的利潤。消息指，近期船公司分配給已簽訂合約貨物的艙位較少，而分配給即時價和那些船公司可以收取高額附加費（如艙位保證附加費）的貨物則較多。裝載或滯港貨物的安排通常是在裝船前一刻決定的，因而加劇貨運的不確定性。
- b. 船公司正調高即時價和合約運費。拒絕訂艙和取消航班增加、以及貨物滯港和徵收附加費等因素，即時價格進一步上漲。與此同時，船公司已宣佈大幅整體加價 (GRI) 和合約運費。
- c. 船公司正調整合約和即時價貨物的艙位分配，付貨人也作出類似的安排。這進一步加劇了市場的波動。
- d. 有評論員指出在現時形勢下，航運合約制度形同虛設。雖然沒有出現整個制度崩潰，但運費進一步出現波動是無可避免的。

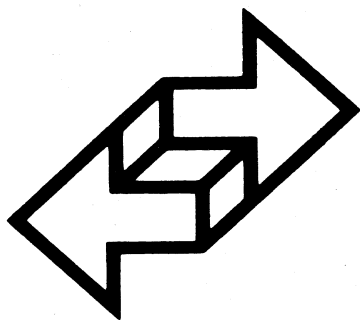
B. 付貨人須注意的事項：

1. 在進行交易時盡量不承擔貨運責任

由於運費和船期不確定性較高，付貨人應盡量避免承擔運輸責任。建議出口商使用國際貿易條款，包括“工廠出貨” (Ex-Work)、 “免費承運人” (FCA)、 “離岸價” (FOB) 等；此外，應拒絕包括“貨物和貨運” (CFR)、 “貨物、 “保險和貨運” (CIF)、 “當場交貨” (DAP)、 “已完稅交貨” (DDP) 等條款。

2. 檢視承運人/服務供應商資料

付貨人可能有需要檢視或增加其承運人和服務供應商的資料，以制定風險分散和緩解策略。



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3. 制定合約和現貨貨物策略

由於服務合約可能未能如過往提供運輸確定性，付貨人可能需要制定新合約和即時價貨物的策略。消息指近期付貨人傾向選擇即時價市場以便利付運。

4. 與承運人/服務供應商制定績效評估系統

付貨人與承運人及服務供應商就績效評估機制達成協議，對各方都有利。機制有助評核承運人和服務供應商的績效，以及能提示他們對客戶的承諾，是市場形勢變化時進行商務談判的有效工具。

5. 與承運人/服務供應商保持密切聯繫，儘早預訂並避免作出任何改動，特別是在臨近貨物付運前

付貨人應小心留意貨運市場形勢，請與你的承運人和服務供應商保持密切聯繫，提前 14 至 21 天進行預訂，並應避免作出任何改動，包括預訂艙位、貨物操作和文件各方面；特別是在臨近貨物付運前。

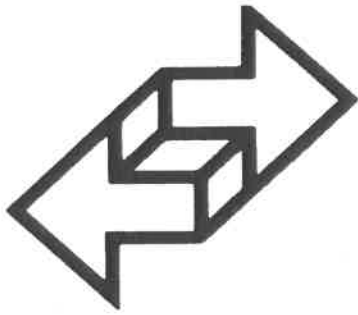
註 1：“By Paul Kelly in News, Sea, Supply Chain Posted May 25, 2021 at 11:23am”

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21 January 2021

The 3rd Shipping Alert

Exporters and importers in the Greater Bay Areas using cross-boundary trucking services should pay attention to the following developments:

1. From 20 Jan 2021, Guangdong authorities will strictly require truck drivers to insert Operation Point Code (作業點編碼) into their Yuekang Code (粵康碼) when they cross the boundary.
2. The Operation Point Code are assigned to the operation points where operations such as loading and unloading of goods could be performed. These operation points could be factory sites, warehouses, or logistics facilities.
3. There reported that in the past few days, in order to reduce the cross boundary traffic, many Operation Point Codes have been cancelled by the local authorities. As a result, the affected exporters and importers would be unable to use cross boundary trucking services.
4. Exporters and importers may consider using the feeder services between Pearl River Delta and Hong Kong as an alternative. However, feeder space is also reported to be very tight. First, there is the usual pre-Chinese New Year cargo rush; second, reduced services due to quarantine requirements of the crew, and third, the usual stoppage of service during the Chinese New Year period.

Advices to exporters, importers and shippers:

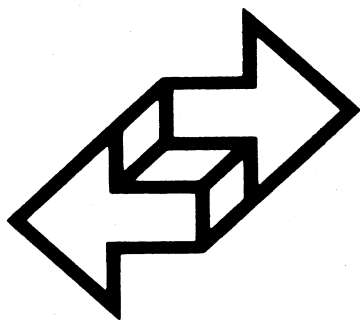
1. Confirm that your Operation Point Code is still valid.
2. Negatively, if cargoes are from or for overseas, shipping via Shenzhen/Guangdong ports could be more practical.
3. If cargoes are for Hong Kong exporters, importers and shippers could explore using feeder services as an alternative. And if the feeders from your location are fully booked, or unavailable, explore whether it is an option to truck and load at nearby ports.
4. It is also worthwhile to explore two-sector trucking (factories to Shenzhen by local trucks, then transfer to cross boundary trucks). Of course, there involves Customs clearance issues, etc.
5. It is necessary to keep close contact with your truckers, feeders, or logistics service providers to minimize unexpected developments.

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2021 年 1 月 21 日

航運提示 3

使用大灣區跨境貨櫃運輸服務的出入口商須注意以下最新發展：

1. 從 2021 年 1 月 20 日起，廣東省當局將嚴格要求貨櫃車司機在進出跨境口岸時，在其粵康碼中插入作業點編碼。
2. 進行貨物裝卸等操作的作業點會獲分發作業點編碼，作業點包括工廠、倉庫或物流設施等。
3. 報導指過去幾天，為了減少跨境交通，當地有關當局取消了多個作業點編碼，以致受影響的進出口商無法使用跨境貨櫃運輸服務。
4. 有鑑於此，進出口商可考慮使用珠三角和香港之間的支線駁船服務。但據報導駁船船位亦十分緊絀，這是由於：一. 一般春節前是貨運高峰；二. 貨櫃船船員隔離檢疫要求導致駁船不來港；三. 一般農曆新年期間駁船停止服務。

給出入口商和付貨人的建議：

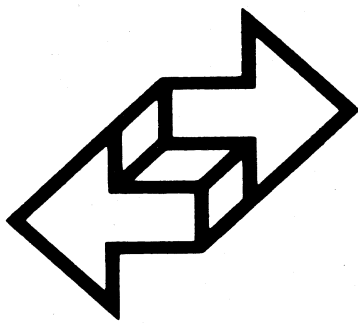
1. 確認你們的作業點編碼是否仍然有效。
2. 如果貨物是來自或運往海外，則經深圳或廣東港口付運可能會更適合。
3. 如果貨物是付運到香港，則應考慮使用支線駁船服務作替代方法。此外，如果貨物所在位置的支線駁船服務已滿，或無法使用，則須考慮是否可以在附近港口進行裝車和使用貨櫃車付運。
4. 可考慮採用兩程貨櫃車運輸（即由工廠至深圳一段由當地貨櫃車付運，然後轉由跨境貨櫃車付運到目的地）。當然，須注意其中涉及的海關清關等事宜。
5. 必須與貨櫃車司機、駁船公司，或物流服務商保持密切聯繫，以避免出現不可預計的意外。

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23 December 2020

Shipping Alert 2

The Hong Kong Shippers' Council wishes to alert shippers that the **sea freight market is rapidly deteriorating, and the current totally undesirable situation is expected to extend into the first quarter 2021.**

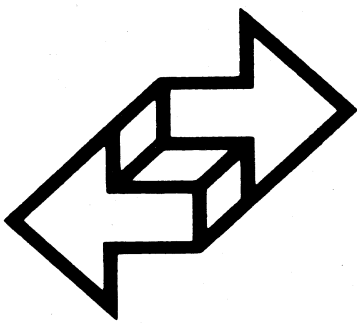
The following are highlights of some of the reported developments:

1. Many main ports are very congested

- UK ports, particularly Felixstowe, are so congested that some shipping lines have been forced to stop calling these ports, and diverted cargo to northern European, French, and Belgium ports. Those containers affected would have to be transshipped back to the U.K. by feeders with substantial delay. Some shipping lines have announced to change routing of their ships to avoid UK ports because of the unacceptable congestion.
- Major European ports including Rotterdam, Antwerp, etc. are reported to be very congested too, and volume is still building up. As holidays are getting close and further city-lockdown is expected, the congestions will be aggravated.
- Some carriers have reported to have stopped accepting export cargo from Europe (especially U.K. and Northern Europe) to Asia in order to avoid the congestion and expedite return of empty containers to Asia.
- Freight rate from Europe to Asia also surged to over US\$5000 a container as a result.
- Similarly, many U.S. ports are reported to be very congested. There reports it is frequent to have over 20 ships queuing in order to get a berth at the main port of Long Beach/Los Angeles.
- Terminals inside are also very congested. Pick-up of import containers and inland movements are seriously disrupted too. Domestic distributions are not smooth.

2. The current disrupted operations is expected to continue into 1st quarter 2021

- Containers are stuck at overseas, and there is no way that shipping lines could increase empty container supply quickly enough to cater for the year end and pre Chinese New Year cargo rush. It is also unlikely that shipping lines or container leasing companies would make very substantial investments in new containers and that there will be time lag even if they wish to.
- The congestions at overseas ports, terminals, and distribution centres, couple with closure of retail outlets, etc. will not be resolved easily. The impact is expected to continue into the 1st quarter 2021.



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- The traditional shipment trough after the Chinese New Year will help, but whether there would be a relief depends on the trade situation and carriers' maneuver in the meantime.

3. Space will be tight and freight rate will stay at ridiculously high levels

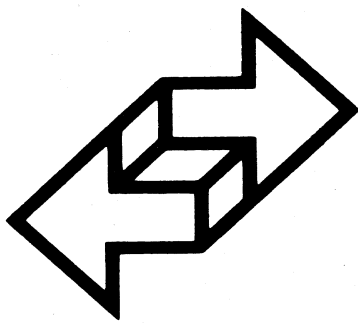
- There are reports that carriers have asked for over US\$10,000 for a 20' container to Europe and US\$1,000 for a 20' container to S. E Asia. These are over 10 folds more than what carriers have been charging. These are record high rates in the past few decades.
- Transpacific rates are more stable as the majority of cargoes are covered by service contract rates. However, the prevailing rates are more than tripled compared with a year ago, and spot rates in the market have also gone rocket high too.
- Freight rates may stay high since there is unlikely to have quick improvements in trade situation.
- The high rates have serious impacts to intra-Asia trade as traders are used to a low-cost environment.

4. Service levels and supply chain reliability are deteriorating

- The port congestion, city lockdown, inland movement disruption, etc. are out of shipping lines (and hence freight forwarders as well)'s control, quick improvements are unlikely. Shippers have to take into account the supply chain would become very unreliable. Shippers cannot count on import, or export in time and as planned. Indeed the situation is expect to deteriorate.
- Besides, some shipping lines have cut short their free storage period for inbound containers, unable to provide containers for confirmed bookings, off load laden export containers even though the containers have been delivered to terminals, or diverted to other ports for discharged for on-carriage to destinations.
- Some Hong Kong importers also reported that some carriers had reduced the free storage period for their inbound cargoes, said to quicken container turnaround time.

5. Beware of surcharges

- Carriers (shipping lines and freight forwarders alike) have put up new charges like Booking Guarantee Fee, Booking Cancellation Penalty Fee, Container Retention Fee, increase in Demurrage Charge, Container Detention Fee, etc. The charges and fees are quite substantial.



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6. What are shipper' organisations doing at the moment?

- Global Shippers' Association, of which The Hong Kong shippers' Council is a member, together with the European Shippers' Council and the European freight forwarder association CLECAT have been lobbying the European Commission to intervene.
- Shippers' organisations in U.S. also requested the Federal Maritime Commission to investigate. Obviously, there is insufficient supply of capacity in the market, and that's hurting the interests of the U.S importers and exporters.
- It is known that some government administrations have started talks with the World Shipping Council, the organization that represents shipping lines' interest on how to resolve the current crisis.

7. What shippers should do at the moment?

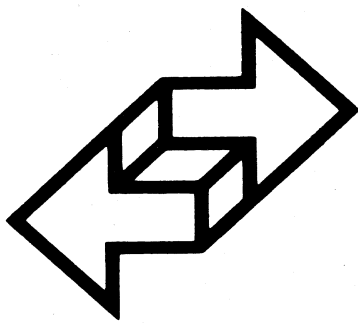
- When making deals, shippers should isolate freight charges and related charges and surcharges from obligations i.e. either pass onto the other party, or single out the cost to make it like on actual cost basis. In other words, it is advisable for Hong Kong exporters/sellers to use Free Carrier (FCA)/Free-on-board (FOB) terms, or making freight and other related charges to be separated from the cost of goods with the former be charged on, for example, actual cost basis.
- Not to accept firm (particularly on tight schedule) shipment date, delivery date, etc. Because these are likely to be out of control.
- Communicate well with the carriers and freight forwarders. Keep update on the market situation, check news and reports, etc.
- Prepare for emergency and have alternatives ready.

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14 December 2020

Shipping Alert 1

The Council wishes to alert Hong Kong shippers of the current shipping market:

(1) Empty container shortage may aggravate

This is due to:

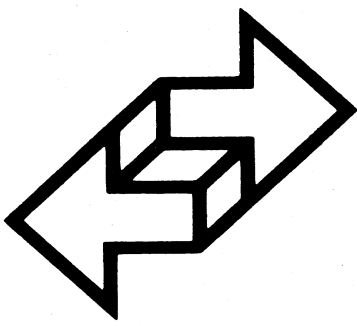
- Shipping lines and container leasing companies have made little investment in new container in the past year;
- Unlikely shipping lines and container leasing companies would make substantial investments in new containers shortly;
- Container movements and availability are disrupted because shipping schedules are heavily disrupted at present. This is due to serious congestions at destination ports; and disruptions of inland movement and distribution.
- Congestions at destination ports unlikely could be resolved quickly;
- National knock-downs may linger.
- Winter holidays will aggravate the problem.
- Return of empty containers from overseas take time and operations are disrupted.

(2) Shipping schedules are very unreliable

- Because many global ports including main ports in Europe, Americas and even Asia are very congested, ships are queuing up, and containers are unable to be picked up, or move inland. Shipping lines frequently resort to port-skips, and even stoppage of certain trade lanes.
- As a result, shipping schedule are very unreliable.

(3) Delay in delivery is common and serious

- Because of disruptions in logistics supply chains which include ocean shipping, landside operations and inland movements, delivery and distribution become uncertain and predictability is compromised.



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(4) Freight rates surged and surcharges are emerging

- Freight rates has doubled or tripled in some major trade lanes.
- In general, freight rates have surged very substantially.
- Shipping lines have little intention to put back the idle ship into services, therefore, capacity shortage is likely to continue.
- Shipping lines and their service providers have taken advantage of the situation and new surcharges have emerged.

(5) Shipping lines would be very profitable

- Because of restricted supply in the market, coupled with low fuel cost, shipping lines are expected to have very good profit in 2020 and probably the year beyond.

What Should Shippers do?

- Shippers' organisations have complained to regulatory authorities including the Federal Maritime Commission (FMC) and DG-Competition, the European Union. FMC is known to start investigation into the capacity shortage and market manipulation issues.
- Individual shippers should place their bookings early and closely liaise with carriers, and follow through with the bookings, loading and movement of their goods. Shippers should demand precise and update track and trace information of their cargo, as well as delivery.
- Shippers who have little control over operations of their cargoes may consider to isolate the freight cost and movement from their usual commitments, or pass on to other parties, until situation improved.
- Shippers should keep abreast of latest market developments and plan well. In many cases, extra buffer would be needed.

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