

# THE HONG KONG SHIPPERS' COUNCIL

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Circular No. M-744

Date: 1 June 2021

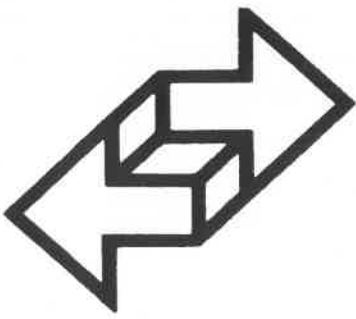
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**To : Executive Committee Members, Hong Kong Shippers' Council**

**Subject : The 4<sup>th</sup> Shipping Alert to Shippers**

The Hong Kong Shippers' Council has issued the 4<sup>th</sup> Shipping Alert. You might consider asking the secretariat of your organisation to distribute to members.

Sunny Ho  
Executive Director



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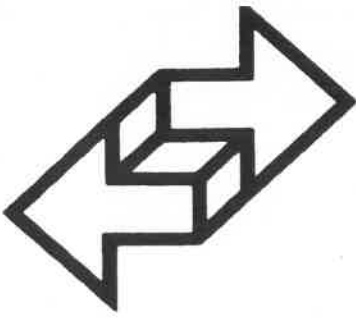
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## The 4<sup>th</sup> Shipping Alert

### **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.

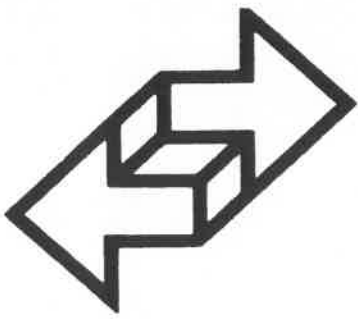
Note 1: “By Paul Kelly in News, Sea, Supply Chain Posted May 25, 2021 at 11:23am”

For inquiry:

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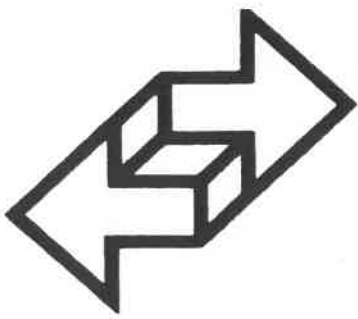
M-744(中文版)

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。

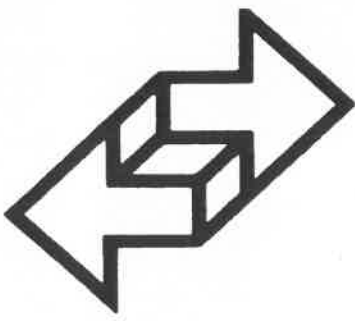
### B. 付貨人須注意的事項：

#### 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，付貨人應儘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”

查詢請聯絡：

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