

RÖHLIG EXPERTS

RÖHLIG ASIA NEWSLETTER

November 2021

Dear Röhlig Customers,

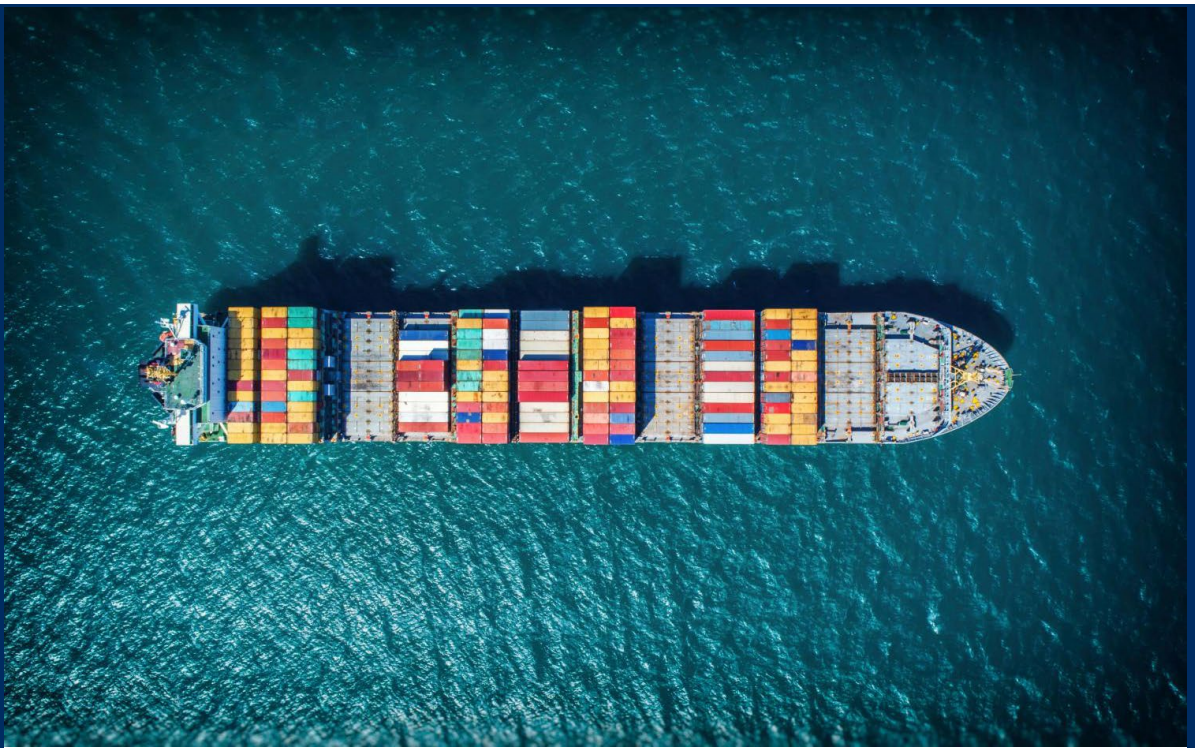
Welcome to November's edition of the Röhlig Asia Logistics Newsletter.

Covered in this edition:

- Countries in South East Asia are slowly returning to a 'new normal', but congestion at major transshipment hubs continues to hamper freight movement.
- India cautiously resumes passenger flights, albeit fewer than pre-pandemic levels.
- Increased rates from October are expected to last throughout this month and into December.

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NORTH ASIA

Greater China

- Recent energy cutbacks have yet to alleviate tight Sea Freight capacity, at least to Oceania. This is likely to continue as we head into the Christmas season.
- All carriers have implemented a withdrawal port congestion fee in Australia and New Zealand.
- **Carriers have extended October rates until the end of November** coinciding with the end of the Christmas rush. Customers may then wish to consider shipping their goods early to avoid disruption at Lunar New Year in February 2022.
- **The Air Freight market has risen sharply since late October by an estimated 30-40%.** This is expected to continue into late November.
- Air Freight continues to operate at low capacity across China.
- **Air Freight space is available from FRA to PVG starting this month.** Interested customers are encouraged to contact our team.
- Some passenger-freighter flights to Shanghai were cancelled due to the International Import Expo running from 5th-12th
- **Rail freight continues to suffer from border congestion,** particularly after Covid-19 cases were identified in border cities. As a precautionary measure, China Railway limited departures in late October into early November, which may lead to departure delays.

South Korea

- Please be advised that recent shortages of AdBlue diesel exhaust fluid may lead to a rise in inland trucking rates as well as truck shortages.

SOUTH EAST ASIA

- **Sea freight FCL capacity remains tight ex all South East Asia origins.**
- Major transshipment ports of Singapore, Port Klang and Tanjung Pelepas report an increased rolling pool of containers. Delays in transshipment average 2-4 weeks at these key hubs.
- **Vessel schedules remain extremely volatile with continued delays on ETA's & ETD's.** And no short term improvement expected. Sea Freight LCL continues to move unabated.
- CFS depots remain full with LCL cargo sailings impacted by vessel schedule delays. We have reports of some LCL CFS restricting cargo movement for cargo drop of or collection at specific times. Some CFS depots continue to suspend bookings of new cargo as they fight the ongoing backlog and attempt to relieve congestion.
- **Airline capacity is in hot demand** with booking lead times extending considerably, especially for USA and Europe markets.
- **Short term rates have seen a significant increase heading into October and November,** as we predicted in last month's update. No immediate relief expected until mid or late December - than then respite will be short term over the Christmas holiday break - with demand coming back again early January.
- **Advance booking and planning for Sea and Air shipments is required by all consignors and consignees** to avoid delay and disappointment.

Singapore

- Still no sign of improvement on port congestion which continues to affect the SE Asia region.
- **Vessel schedules remain unstable with ongoing delays and port omissions.**

Malaysia

- **20' Sea Freight containers continue to be in short supply at TPP and PKG .**
- The Oceania Sea Freight market remains a challenge due to port omissions and port congestion at Singapore .
- Customers are advised to book 1-2 weeks in advance the secure Air

Freight space due to congestion at major gateways. In particular, space to USA and Europe remains critical.

Vietnam

- **Sea Freight is still battling against port congestion, blank sailings, port omissions, etc.** We advise all booking requests to be submitted at the earliest opportunity.
- Vietnam has returned to a 'new normal', but with industries suddenly resuming operations, **we see Air Freight challenges regarding space and price.** Almost all airlines are fully booked until November.

Thailand

- **Sea Freight import is encountering delays** as the Government implements lockdown in some Covid 'red-zones' in Bangkok from November 1st.
- Flights destined for the US are suffering from backlog, causing rates to climb. However, **space may open up a little in the latter half of November.**

INDIA

- All ports, CFS and ICDs remain fully operational.
- **Equipment shortages are expected to persist** as liners struggle to reposition.
- CONCOR has levied an imbalance surcharge to overcome equipment challenges in the Indian hinterland.
- Private rail operators started services on the Kolkata – Nepal route. **Röhlig offers routing via both Kolkata and Visakhapatnam into Nepal** and has started accepting at Biratnagar ICP.
- Due to industry challenges in Air, we see an upsurge in the demand for LCL and are able to secure all shipments via our LCL product for both import and export.
- The Government of India has resumed passenger flights, although due to low demand airlines are keeping flight numbers low for now, thus restricting capacity.
- **Air Freight is stable, but space remains tight,** with space still allocated to the highest bidder.

RÖHLIG NEWS



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