

Starfuels Report

MOC Summary 2025-08-01



ARA Barge Freight Market - Gasoil Routes

Location	Rate [EUR/ton]
ARA CROSS HARBOR	EUR 2.20 - 3.70
ROTTERDAM AMSTERDAM	EUR 3.20 - 4.70
ROTTERDAM ANTWERP	EUR 3.20 - 4.70
ANTWERP AMSTERDAM	EUR 4.15 - 5.65
FLUSHING ANTWERP	EUR 3.39 - 4.89
FLUSHING ROTTERDAM	EUR 4.22 - 5.72
FLUSHING AMSTERDAM	EUR 4.59 - 6.09
GHENT FLUSHING	EUR 3.73 - 5.23
GHENT ANTWERP	EUR 3.87 - 5.37
GHENT ROTTERDAM	EUR 4.50 - 6.00
GHENT AMSTERDAM	EUR 4.85 - 6.35

Summary:

The ARA CPP barge freight rate report for August 1, 2025, indicates stable rates for middle distillates with minor adjustments in light ends on two routes, amidst a backdrop of limited market activity and underutilized vessels. Delays were reported at Vesta's terminal in Antwerp for gasoil loading, and freight deals were largely closed at consistent or slightly adjusted rates compared to the previous day, reflecting low demand with sufficient volume to keep some freight activities standard. Market commentary highlights the need for upcoming weeks to reveal whether the current downturn will continue.

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Rhine Barge Freight Market - Gasoil Destinations

Location	Rate [EUR/ton]
Duisburg	EUR 8.90 - 9.20
Dortmund	EUR 10.90 - 11.20
Cologne	EUR 10.40 - 10.70
Frankfurt	EUR 16.40 - 16.70
Karlsruhe	EUR 17.90 - 18.20
Strasbourg	EUR 19.40 - 19.70
Basle	EUR 23.44 - 23.74

Summary:

Rhine barge freight rates for gasoil and gasoline across various routes remained stable with slight variations due to ongoing "backwardation" affecting stockpiling and logistics. The market is influenced by detailed observations of the Rhine's water levels, which are expected to change, yet current barge supply exceeds demand, supporting prompt logistical solutions. The focus on early October loading is impacted by the upcoming "Day of German Unity," slowing discussions on fresh demand, while charterers and barge owners consider alternative business opportunities within the ARA.