CUSTOMER ADVISORY

FREIGHT MARKET UPDATE – SEPTEMBER TO NOVEMBER 2026

Plan Early. Protect Stock. Stay Ahead.

Dear Valued Customer,

The Asia to Australia freight market is entering September with one clear message for importers: the market is manageable, but only if planning starts early.

Freight indexes are no longer moving in one direction across every lane. Some ocean market indicators are levelling off, while others remain elevated or are being pushed higher by weather, congestion, transhipment pressure and geopolitical uncertainty. Airfreight is more stable than ocean in some markets, but peak-season urgency can still tighten space quickly.
For Nexus customers, the opportunity is to stay ahead of the market rather than react to it.
The businesses best placed for September, October and November will be those that forecast early, book before cargo becomes urgent, build realistic buffers and choose routing based on delivery certainty, not freight rate alone.
This is especially important for cargo linked to Black Friday, Christmas inventory,
retail promotions, seasonal stock, production schedules, customer orders and project deadlines.



Why This Matters Now

September and early October are important control months.
China's Golden Week holiday runs from 1–7 October 2026. In the lead-up, factories, suppliers, warehouses, trucking providers and carriers normally face increased booking activity as exporters try to move cargo before the holiday closure. After Golden Week, cargo can rebound quickly as factories restart and backlogs move into the system.
For Australian retailers and importers preparing for Black Friday on 27 November 2026, timing is now critical. Stock that needs to be available for November promotions should not be planned around the most optimistic transit time. Allow for origin handover, container release, vessel departure, possible transhipment, Australian arrival, clearance, unpack, delivery and distribution-centre processing.
The message is not "panic". The message is "plan earlier than usual".
If your shipment is linked to a promotional or customer commitment date, September planning decisions will determine how much control you have in November.

Key Risk Areas

1. China to Australia: stabilising, but schedule risk remains

China to Australia ocean freight has moved from a pure rate-pressure story to a reliability and timing story.
The strongest operational watch points remain Shanghai, Ningbo and Zhoushan, where typhoon disruption and port recovery pressure have affected vessel flows, terminal windows and sailing schedules. South China ports such as Yantian, Shekou and Nansha are less directly affected by East China weather, but schedule knock-on effects can still occur across carrier networks.
Customers shipping from Shanghai, Ningbo, Qingdao, Tianjin, Yantian, Shekou and Nansha should continue to book early and avoid relying only on advertised ETDs.

Nexus recommendation: allow 3 to 4 weeks booking lead time for China ocean freight, particularly for East China cargo and promotional inventory.



2. South East Asia to Australia: direct services remain valuable

South East Asia remains more stable than East China, but customers should separate direct services from transhipment routings.
Cargo moving through Singapore, Port Klang and Tanjung Pelepas remains exposed to hub connectivity risk. The issue is not necessarily a full port shutdown. The bigger risk is missed onward connections caused by vessel bunching, relay network changes, port congestion or delayed feeder arrivals.
Where the cargo is time-sensitive, the cheapest transhipment routing may not be the best landed-cost decision.

Nexus recommendation: prioritise direct or more reliable services where delivery certainty matters more than a small freight saving.

3. Indian Subcontinent to Australia: plan on door-to-door lead time

The Indian Subcontinent remains operationally complex.

India, Bangladesh, Sri Lanka and Pakistan continue to face a combination of monsoon effects, inland transport disruption, equipment repositioning pressure, Colombo transhipment dwell risk and Middle East network changes.

Customers should avoid planning on ocean transit time alone. For this region, the door-to-door lead time is the real planning number.

Nexus recommendation: allow at least 4 weeks booking lead time for Indian Subcontinent cargo, with additional buffer for Bangladesh, inland India and cargo moving via Colombo.

4. Australian destination ports: operational, but buffers are still needed

Sydney, Melbourne, Brisbane, Adelaide and Fremantle remain operational. The issue is not a uniform shutdown across Australian terminals.
The main watch points are vessel bunching, yard utilisation, transport slot availability, biosecurity inspection, quarantine processing and empty-container dehire timing. A vessel ETA should not be treated as the same thing as a delivery-ready date.

Nexus recommendation: avoid committing to distribution-centre or customer delivery dates immediately after advertised vessel arrival.

5. BMSB season has commenced

Australia's 2026-27 Brown Marmorated Stink Bug season commenced on 1 September 2026. Importers of targeted goods from targeted risk countries should confirm treatment, documentation, vessel and shipping requirements before cargo is loaded. BMSB should be treated as an origin planning requirement, not an arrival problem.

Nexus recommendation: confirm BMSB exposure before booking and before loading to reduce the risk of delay on arrival.

6. Airfreight: a controlled option, not a last-minute rescue plan

Airfreight into Australia remains more flexible than ocean on some lanes, but it is not immune to peak-season pressure.

China and South East Asia airfreight remain generally manageable outside peak departure windows. However, typhoon disruption, e-commerce activity, high-value technology cargo, pharmaceutical movements and urgent replenishment demand can tighten uplift quickly.

The Indian Subcontinent airfreight market is firmer, with tighter space from key gateways and more exposure to connection risk.

Nexus recommendation: use airfreight selectively for launch quantities, urgent replenishment, priority SKUs or stockout-risk cargo rather than shifting entire purchase orders at the last minute.

Market Index Signal

The market indexes are sending a balanced message: the peak spike may be easing in some areas, but the market remains elevated and sensitive to disruption.

Sources: Shanghai Shipping Exchange, Drewry World Container Index, Drewry Intra-Asia Container Index, Drewry Airfreight Price Index, Baltic Air Freight Index / TAC Index.

SCFI / CCFI
China export container market

Remains elevated after the sharp June-July rise. Read as direction, not a shipment quote.

ELEVATED

Drewry WCI
Global container benchmark

Eased slightly in late August, but still well above last year's level - not back to normal conditions.

EASED SLIGHTLY

Drewry IACI
Intra-Asia container index

Pressure inside Asian feeder and transhipment networks - matters for SE Asia & Indian Subcontinent.

MOVED HIGHER

Drewry / Baltic Air Freight
Global airfreight price index

Softened from recent highs, but still above last year's levels - supports selective use only.

SOFTENED

1. Shanghai Containerized Freight Index / China Containerized Freight Index
China export container market pressure remains elevated after the sharp June and July rise. The index should be read as a market direction signal, not a shipment quote.

2. Drewry World Container Index
The WCI eased slightly in late August, but remains significantly above last year's level. This suggests the market is not falling back to normal conditions.

3. Drewry Intra-Asia Container Index
The IACI has moved higher, reflecting pressure inside Asian feeder and transhipment networks. This matters for South East Asia and Indian Subcontinent cargo that depends on Asian hub connections.

4. Drewry Airfreight Price Index / Baltic Air Freight Index
Airfreight indexes have softened from recent highs, but remain above last year's levels. This supports selective use of airfreight where stock availability or delivery certainty justifies the premium.

Nexus reading: indexes are no longer pointing to a simple "rates rising" story. They are pointing to a market where timing, routing, reliability and contingency planning matter as much as the rate itself.



What's been announced by carriers

Carriers continue to manage capacity, schedule reliability and cost recovery closely across Asia to Australia and related trade lanes.

Across the market, customers should expect continued use of:

- Rate restoration programmes
- BAF and fuel adjustment mechanisms
- Emergency fuel or security-related surcharges where applicable
- Blank sailings around seasonal demand changes
- Schedule changes and routing adjustments
- Tighter space and equipment management
- Shorter quotation validity periods

This does not mean every shipment will face the same outcome.
It means customers should avoid treating September and October as a normal booking cycle.
The best control point is early visibility.

What this means for your cargo

For September, October and November shipments, customers should plan around the delivery requirement, not only the sailing date.
Customers should expect:

- less predictable carrier schedules;
- continued rollover risk on high-demand sailings;
- tighter space on preferred routes;
- possible equipment pressure at selected origins;
- transhipment delay risk through Singapore, Port Klang, Tanjung Pelepas and Colombo;
- BMSB compliance requirements from 1 September;
- stronger airfreight demand closer to Black Friday and Christmas;
- the need for earlier documentation, supplier readiness and booking confirmation.

For Black Friday cargo, Nexus recommends confirming shipment plans now. If the cargo is not already in motion or booked for a reliable September/early October departure, customers should review whether ocean, direct service, split shipment, sea-air or selective airfreight is the right option.

September to November Outlook



September: control month

The key month to secure space, manage East China disruption, check BMSB requirements and protect Black Friday and Christmas inventory.

Nexus recommendation: finalise September and early October bookings now, especially for East China and Indian Subcontinent cargo.

October: Golden Week and restart risk

Golden Week from 1 to 7 October will creates a temporary factory and logistics slowdown in China, followed by a restart period where cargo backlogs can move quickly into the system.

Nexus recommendation: do not wait until after Golden Week to make booking decisions for November delivery needs.



November: risk shifts toward urgent cargo and airfreight

By November, the main ocean window for Black Friday and Christmas inventory will be closing. Customers who identify stock gaps late may need selective airfreight, but uplift may tighten as urgency increases.

Nexus recommendation: use partial airfreight strategically for critical SKUs, launch quantities or stockout-risk items, not as a default recovery option.

Key Actions to Take Now

1. Book China ocean freight 3 to 4 weeks ahead, especially Shanghai and Ningbo cargo.
2. Book Indian Subcontinent cargo at least 4 weeks ahead, with extra time for Bangladesh and inland India.
3. Provide Nexus with rolling 6 to 8 week shipment forecasts.
4. Confirm Black Friday and Christmas inventory shipment plans now.
5. Build buffer around Golden Week: 1 to 7 October 2026.
6. Prioritise direct services where delivery certainty outweighs a small freight saving.
7. Split major promotional shipments across more than one sailing or carrier.
8. Check BMSB requirements before cargo is loaded.
9. Keep supplier readiness, container release and documentation aligned.
10. Use airfreight selectively for time-critical or stockout-risk cargo.
11. Review total landed cost, including delay risk, not only freight rate.
12. Do not commit final delivery dates based only on advertised carrier ETA.



How Nexus Logix Can Help

Nexus Logix is actively monitoring market conditions across China, North Asia, South East Asia, the Indian Subcontinent, Middle East-related trade impacts and Australian destination port performance.
We are working with carrier and network partners to help customers:

- secure space earlier;
- review direct and transhipment routing options;
- manage container availability;
- reduce rollover exposure;
- assess port and transhipment risk;
- monitor carrier schedule changes;
- support BMSB compliance planning;
- protect promotional and seasonal inventory;
- assess selective airfreight options;
- provide proactive visibility through CargoWise Neo and our logistics platform.

The market is not out of control. But it does reward customers who act early.
Speak with the Nexus team now about your September, October and November shipment pipeline so we can help you plan early, secure the right options and stay ahead of market pressure.
At Nexus Logix, we move in harmony with your supply chain, helping you protect stock availability, customer commitments and delivery confidence.

STAY COMPLIANT. STAY INFORMED. STAY MOVING.

Follow us on LinkedIn for frequent market updates.



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