CUSTOMER ADVISORY

FREIGHT MARKET UPDATE: NOVEMBER 2026

Protect Your Cargo. Protect Your Business.

Dear Valued Customer,

The Asia to Australia freight market enters November with mixed signals. Ocean indexes are stabilising, but preferred vessel space remains sensitive to carrier capacity adjustments, while airfreight demand strengthens ahead of year-end.

For Christmas stock you still need to move, a confirmed sailing matters more than a booking quotation. And as recent incidents show, protecting the cargo itself matters as much as protecting the delivery date.



November at a Glance

CHINA TO AUSTRALIA CAPACITY:

4.2% of nominal capacity blanked across 5 October to 2 November, according to Navia's October assessment.

SCHEDULE RELIABILITY:

global on-time performance was 51.6% in September against 51.7% in August. October results are not yet available.

AIRFREIGHT:

September global average rates were 25% higher year-on-year. October week 42 rates rose 4% week-on-week, signalling firmer Q4 conditions.

CARRIER CHANGES:

ANL/CMA CGM rate restorations, MSC bunker adjustments and Maersk's new export documentation requirements take effect during November.

CUSTOMER PRIORITY:

secure Christmas-critical shipments, review marine insurance and plan January cargo ahead of Chinese New Year.

Important Customer Alert: Is Your Cargo Insured?

Your cargo can be undamaged and still cost you dearly.

Two recent maritime incidents highlight why marine cargo insurance deserves serious consideration.

April 2026, EVER LENIENT: a container fire at Singapore's Pasir Panjang Terminal resulted in a General Average declaration.

August 2026, CMA CGM PETRA: a cargo-hold fire in the Strait of Malacca resulted in salvage operations and a General Average declaration in September.

What is General Average?

Under maritime law, extraordinary sacrifices or expenses reasonably incurred to save a vessel and its cargo from common danger may be shared among the parties with financial interests in the voyage, including owners of cargo that was not damaged.

This may surprise many importers: even when your goods arrive undamaged, you could still be required to provide financial security and contribute towards salvage expenses before your cargo is released.

For uninsured cargo owners, the consequences can include substantial unexpected financial liabilities, cash-flow pressure and prolonged cargo-release delays.

Nexus recommendation: review marine cargo insurance before shipping, including General Average and salvage protection. Nexus can help identify your insurance requirements and connect you with qualified marine insurance specialists to arrange suitable coverage.

Insurance is subject to policy conditions and exclusions. Standard marine cargo insurance generally does not cover delay alone.

Key Trade Lanes

1. China to Australia: secure the sailing, not just the booking

Navia reported 13,251 TEU of capacity blanked across China to Australia services between 5 October and 2 November. Shanghai and Ningbo have resumed normal port operations after October weather disruption, although adjusted vessel rotations can still affect later schedules.

Indicative sea freight planning, major origins to Australia's east coast

Shanghai / Ningbo:	approximately 3 to 5 weeks
Qingdao / Tianjin:	approximately 4 to 5 weeks
Yantian / Shekou / Nansha:	approximately 3 to 4 weeks

Nexus recommendation: for Christmas-critical inventory, secure confirmed space on the earliest suitable November sailing. Do not commit customer delivery dates until the vessel schedule and delivery buffer have been assessed.

2. South East Asia to Australia: connection reliability matters

Singapore, Port Klang and Tanjung Pelepas show improving port conditions, but missed transhipment connections remain the risk.

A recent example: ONE advised that feeder vessel CAPE HELLAS V.019E was unable to obtain its Singapore berth allocation before the required 5 October deadline. Cargo was consequently redirected for discharge at Port Klang Northport, requiring alternative arrangements for onward movement.

A single missed connection can alter the entire journey, even after cargo has departed origin.

Nexus recommendation: allow approximately 4 to 6 weeks from departure to arrival when planning transhipment cargo, depending on origin and routing. Prioritise direct services where delivery certainty is critical.

3. Indian Subcontinent to Australia: plan the complete journey

India, Bangladesh, Sri Lanka and Pakistan shipments frequently depend on feeder and transhipment connections through Colombo, Singapore or Port Klang. A missed connection can add substantial time to the published schedule.

Nexus recommendation: allow approximately 5 to 6 weeks from departure to arrival as an initial planning guide. Confirm actual routing and connection arrangements before booking.

Cyclone Arnab, late October update: the storm made landfall on India's Andhra Pradesh coast on 28 October, prompting temporary vessel-handling restrictions. As terminals recover, delayed vessel rotations, feeder connections and equipment repositioning may affect some November cargo movements.



4. Australian ports: conditions remain manageable

Portcast reported low median vessel waiting times for 18 to 24 October:

Median vessel waiting times, 18 to 24 October

Sydney:	0.08 days
Melbourne:	0.32 days
Brisbane:	0.92 days
Fremantle:	0.04 days

These are anchorage waiting times only, not customs, terminal processing or inland delivery. The planning point remains allowing realistic time between vessel arrival and final delivery.



Real-World Incident, EVER SMART: unexpected delays beyond immediate control

The Evergreen Line vessel EVER SMART developed a serious mechanical problem after reaching waters off Queensland in late September. Unable to complete its Australia-bound voyage, the vessel returned to Kaohsiung, Taiwan, for repairs.

Cargo originally scheduled for Sydney on 26 September and Melbourne on 28 September was affected. As at 27 October, affected importers are still awaiting arrival confirmation.

Although not every disruption can be prevented, timely communication, shipment visibility and coordination of alternatives remain essential responsibilities of the Freight Forwarder.

Air Freight: Q4 demand is strengthening

WorldACD reported global air cargo volumes up 9% year-on-year in September, with average rates 25% above September 2025. In the week of 12 to 18 October, rates rose 4% week-on-week and sat almost 30% higher year-on-year. These are global indicators rather than Australia-specific rates, but they point to firmer conditions as year-end demand builds.

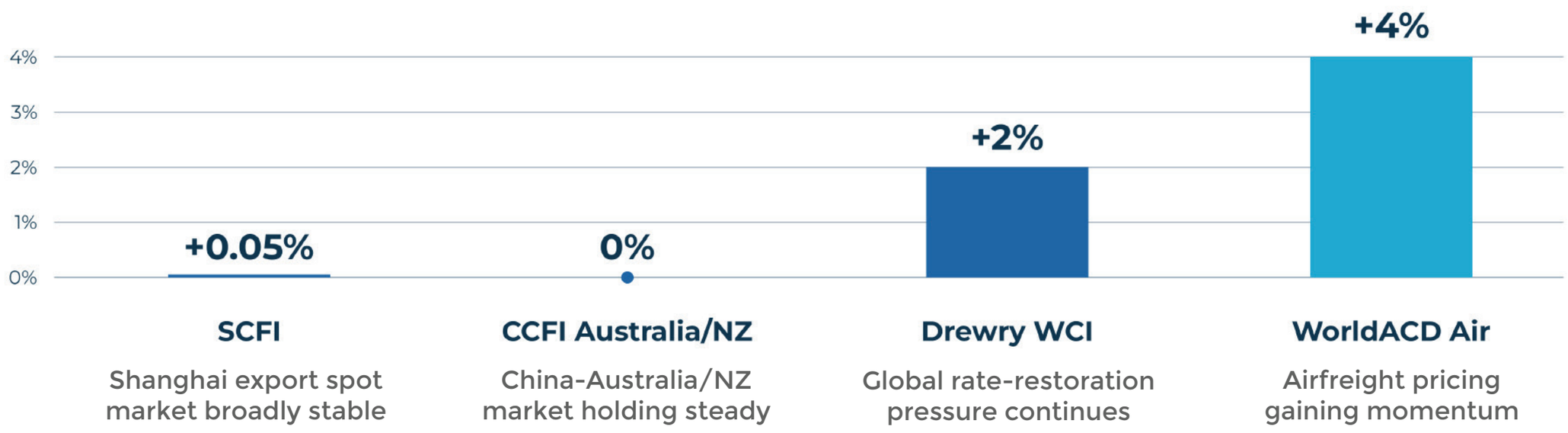
China and South East Asia capacity remains available on many services, while Indian Subcontinent shipments face greater connection and aircraft-capacity constraints on selected routes.

Nexus recommendation: for Black Friday, Christmas and urgent replenishment, consider selective airfreight for critical products. Secure uplift as early as possible rather than wait for a stockout.



Market Index Signals

Latest weekly movement (%)



Ocean readings: 22 to 23 October. WorldACD: 12 to 18 October.

Nexus market reading: ocean prices are not rising uniformly, but stable indexes do not guarantee space on preferred sailings. Airfreight pricing shows stronger upward momentum. WCI and WorldACD represent broader international markets, not Australia-specific quotations.

What Carriers Have Announced

ANL / CMA CGM:
rate restorations effective 1 November of USD 500 per 20ft and USD 1,000 per 40ft from North East Asia, and USD 300 per 20ft and USD 600 per 40ft from South East Asia, Indian Subcontinent and Middle East origins. A separate Asia to Australia notice was then issued for 15 November. Applicability and interaction between the notices must be confirmed; they should not be assumed cumulative.

MSC:
November Bunker Recovery Charge adjustments of USD 571 per TEU from North East Asia and USD 791 per TEU from South East Asia to Oceania for dry cargo. Australian destination charge revisions also commence on 1 November.

PIL:
customers should confirm applicable November bunker recovery, destination and other tariff adjustments against their specific shipment and carrier notice.

These announcements reflect carrier intentions and tariff changes, not necessarily uniform market-wide increases.

Australian Exports: sea and air

Sea freight: important Maersk policy change

Maersk's No Shipping Instruction, No Load policy for eligible Australian exports soft launches on 2 November and is fully enforced from 30 November 2026.

Shipping Instructions and the Bill of Lading Verify Copy process must be completed by the applicable deadline, currently 38 hours before vessel ETA at the first load port. Non-compliance could result in cargo being rolled and additional charges.

Nexus recommendation: confirm export documentation, equipment and carrier cut-offs well before cargo reaches the terminal.

Global Geopolitics: Q4 outlook

Continued Middle East tensions and uncertainty around the Strait of Hormuz and Red Sea are likely to keep fuel costs, marine insurance premiums and carrier surcharges volatile through Q4. Asia to Australia services generally do not transit Hormuz, but higher bunker costs, vessel redeployment and airline network adjustments can still influence conditions indirectly.

Nexus outlook: further fuel-related adjustments and selective capacity disruption remain possible through November and December.



November to January Outlook

NOVEMBER

protect delivery commitments:

ocean capacity remains sensitive on preferred sailings, and airfreight demand and pricing are expected to stay firm.

DECEMBER

secure final delivery windows:

ocean demand should moderate, although blank sailings may affect departures. Airfreight is expected to stay firm through the first half of December.

JANUARY

prepare for Chinese New Year:

with Lunar New Year on 6 February 2027, confirm production schedules and January vessel bookings before year-end.

Nexus Recommends

1. **Protect your cargo:** review marine insurance, including General Average and salvage cover.
2. **Secure vessel space:** prioritise confirmed sailing allocation for Christmas-critical shipments.
3. **Forecast ahead:** provide Nexus with rolling 6 to 8 week shipment forecasts.
4. **Protect delivery commitments:** assess routing, transhipment and schedule reliability before booking.
5. **Manage urgent inventory:** consider selective airfreight where delayed stock could affect sales or production.
6. **Stay compliant:** confirm export documentation and carrier cut-offs before loading.



How Nexus Logix Can Help

Nexus Logix combines experienced supply chain professionals, international carrier relationships and digital shipment visibility to help customers decide and respond as conditions change. From securing services and managing shipment risk to customs compliance, delivery planning and guidance on marine cargo insurance, our focus is protecting your commercial interests.

Speak with your Nexus Portfolio Manager about your November to January shipment pipeline and marine insurance requirements.

Market information reviewed to 29 October 2026. Index movements, carrier charges and operating conditions may change without notice. Transit times are indicative and are not guaranteed.

Sources

Market data: *Shanghai Shipping Exchange (SCFI, CCFI), Drewry (World Container Index), WorldACD (air cargo), Navia (capacity and blank sailings), Kuehne+Nagel (schedule reliability), Portcast (port waiting times).*

Carrier and regulatory notices: *ANL/CMA CGM, MSC, PIL, Maersk, ONE, Qantas Freight, DAFF.*

Incidents: *W.K. Webster (EVER LENIENT), Kuehne+Nagel (CMA CGM PETRA), published importer update (EVER SMART), The Loadstar and ChemAnalyst (Cyclone Arnab).*

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