CUSTOMER ADVISORY

FREIGHT MARKET UPDATE: OCTOBER TO DECEMBER 2026

Plan Around Buffer, Not the Schedule.

Sources: Sea-Intelligence; Portcast; Shanghai Shipping Exchange (CCFI); Drewry; IATA; ANL/CMA CGM; DAFF; ABS. Market data reviewed to 6 October 2026.

Dear Valued Customer,

Asia to Australia freight enters October with an unusual combination: port queues at major Asian gateways are easing, but global schedule reliability has fallen to its weakest level in four years.

The market is not short of ships. The problem is that weather, route changes, blank sailings and geopolitical risk mean capacity is not always where, or when, the schedule says it will be. From October to December, the businesses that stay in control will be the ones that build in buffer and decide early.



October at a Glance

49.9%
Schedule reliability, August
Weakest in four years

6.81 days
Average delay for late vessels
Highest since March 2022

0.94 days
Shanghai median vessel wait
Down sharply from September

1,875.86
CCFI China to Australia/New Zealand
30 September. Up 2.1% week on week

+4.4% vs -0.1%
Air cargo demand vs capacity
August, year on year. Demand is ahead of space

15 October
Rate restoration announced
By some carriers, Asia to Australia. A firming signal, not a guarantee

Ports are clearing. Reliability is not.

Sources: Sea-Intelligence; Portcast; Shanghai Shipping Exchange (CCFI); Drewry; IATA; ANL/CMA CGM; DAFF; ABS. Market data reviewed to 6 October 2026.

Why This Matters Now

October is the highest-risk month of this outlook. The post-Golden Week restart, vessels still displaced by September weather, mid-October rate-restoration programmes and poor schedule reliability are all landing in the same window.

None of this means the market is out of control. It means customers who plan around buffer, rather than the published ETD, keep more control over their delivery dates.

Key Risk Areas

1. China to Australia: queues easing, network risk remains

Shanghai and Ningbo vessel waits have fallen sharply since the September typhoon period, to 0.94 and 1.60 days respectively. Displaced vessels and missed connections will take longer to clear. Some carriers have also announced a rate-restoration programme from 15 October of USD 500 per 20ft and USD 1,000 per 40ft container. Treat this as a firming signal, not a guaranteed outcome.

Nexus recommendation: allow 3 to 4 weeks booking lead time through October and add 4 to 7 days contingency for Shanghai and Ningbo departures where stock is critical.

2. South East Asia to Australia: congestion low, connection risk higher

Singapore, Port Klang and Ho Chi Minh City are running with minimal vessel waits. The risk has shifted to transhipment: cargo can leave on time and still lose days on a missed connection. A rate-restoration programme of USD 300 per 20ft and USD 600 per 40ft has been announced by some carriers from 15 October.

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

3. Indian Subcontinent to Australia: origin ports clear, connections decide

Mundra, Nhava Sheva and Chennai remain operationally healthy, and Colombo has improved materially. End-to-end reliability now depends more on feeder and transhipment connections than on the origin berth.

Nexus recommendation: plan approximately 25 to 40 days from principal Indian and Sri Lankan gateways for FCL, with extra buffer for multiple feeder legs or inland origins.



4. Australian destination ports: the quieter part of the chain

Sydney, Melbourne, Brisbane and Fremantle are comparatively clear. The risk for importers is late arrival or altered rotation out of Asia, not queuing on arrival. A clear Australian berth cannot recover time already lost.

Nexus recommendation: keep contingency between vessel ETA and warehouse, production or retail delivery commitments.

5. BMSB season remains active

The 2026-27 season runs from 1 September 2026 to 30 April 2027. DAFF has added Ethyl Formate as an onshore treatment option and removed the Rolled Goods Policy and Safeguarding Arrangements Scheme for this season.

Nexus recommendation: review BMSB eligibility, treatment and documentation before cargo is loaded, particularly for machinery, automotive and metal goods.

Airfreight: Demand Is Ahead of Capacity

IATA reported August air cargo demand up 4.4% year on year while capacity fell 0.1%. As the October to November peak builds, late production and delayed vessels can push cargo from ocean to air and tighten space quickly.

Nexus recommendation: convert selectively, not wholesale. Move launch quantities, priority SKUs and stockout-risk lines by air and leave the balance on ocean.



Costs and Global Risk

Fuel is sending a split signal. ANL lowered its Australia/New Zealand BAF reference from USD 800 to USD 725 per tonne from 1 October, but Middle East security risk is keeping fuel, insurance and vessel deployment volatile. Shipping through the Strait of Hormuz continues; it is not closed. For Asia to Australia services the effect is indirect, but costs can still move quickly.

Nexus recommendation: budget on total landed logistics cost, not the base freight rate alone.

For Australian Exporters

Australia is in its seasonal export peak. Space is generally available, but port omissions, rotation changes and tighter outbound air capacity remain the bigger risks.

- **Sea:** protect cut-offs, equipment availability and transhipment connections.
- **Air:** secure priority uplift earlier than usual for perishables, urgent spares and high-value cargo.
- **Both:** the cheapest routing has little value if it misses the customer commitment.



October to December Outlook

OCTOBER

Highest-risk month.

Ocean:

firm and uneven in the first half.

Air:

strengthening as Q4 builds.

NOVEMBER

Ocean balances,
air tightens.

Ocean:

some scope for easing if reliability improves.

Air:

urgent Black Friday and stock-gap demand.

DECEMBER

Ocean softens,
air stays strong early.

Ocean:

blank sailings limit rate falls.

Air:

firm until Christmas cut-offs, then eases.

Key Dates

27 Nov

Black Friday. Stock should already be on water

December

Christmas delivery cut-offs

6 Feb 2027

Lunar New Year.
Positioning starts January

Wild Card

Middle East risk to fuel, insurance and vessel and aircraft deployment.

Nexus reading: rate indexes alone no longer tell the full story this quarter. Schedule reliability and effective capacity are driving actual delivery outcomes.



Key Actions to Take Now

1. Book China cargo 3 to 4 weeks ahead through October, with 4 to 7 days contingency where stock is critical.

2. Give Nexus a rolling 6 to 8 week shipment forecast.

3. Compare reliability and connection risk alongside freight rate, especially for promotional or fixed-date cargo.

4. Prioritise direct South East Asia services and build connection time into Indian Subcontinent routings.

5. Split high-value seasonal inventory across sailings or carriers.

6. Use selective air conversion before a stockout occurs, not after.

7. Check BMSB requirements before origin departure.

8. Exporters: confirm equipment, cut-offs and uplift early.

9. Budget on total landed cost, including BAF, rate restoration, local charges, detention and demurrage.



How Nexus Logix Can Help

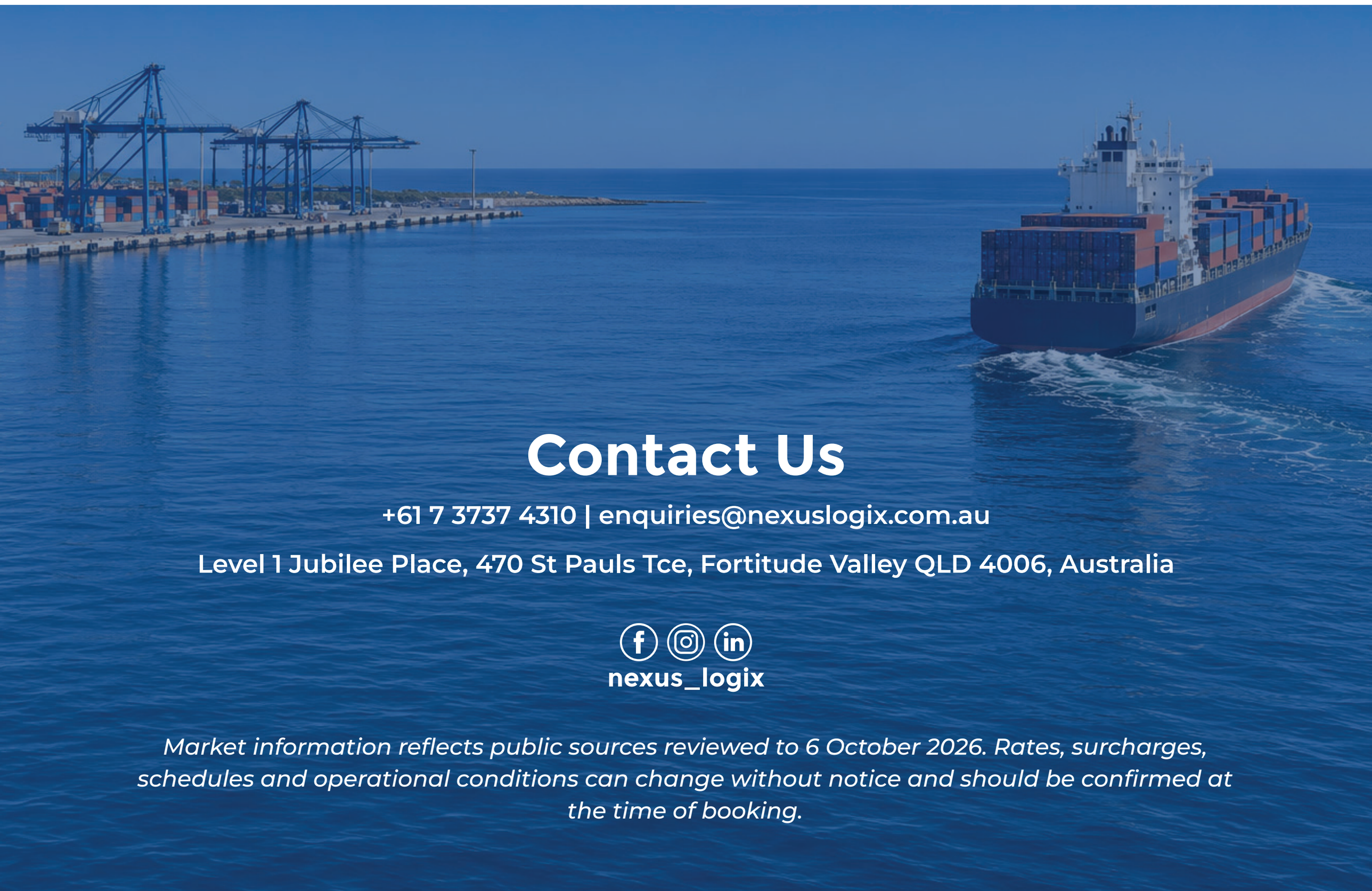
Nexus Logix is monitoring freight indexes, carrier capacity, schedule reliability, Asian port conditions, airfreight trends, fuel costs, BMSB requirements and geopolitical developments so customers can act before disruption reaches their supply chain.

The market is not out of control, but it continues to reward businesses that act early. Speak with the Nexus team about your October, November and December pipeline so we can help you plan early, protect critical dates and stay ahead of market pressure.

At Nexus Logix, we move in harmony with your supply chain.

STAY COMPLIANT. STAY INFORMED. STAY MOVING.

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Market information reflects public sources reviewed to 6 October 2026. Rates, surcharges, schedules and operational conditions can change without notice and should be confirmed at the time of booking.