

.Navia

Freight Market Update

October 2026



China to AU: October Snapshot

Weeks 41–45 · w/c 5 Oct – 2 Nov 2026

BLANK SAILINGS

4.2%

of TEU on offer
blanked

Kangaroo (MSC) suspended all
October

TEU REMOVED

13,251

TEU blanked

Capacity pulled across weeks
41–45

TEU OFFERED

318,786

TEU, China to
Australia

Weekly: 42,146 · 46,341 · 82,304
· 74,534 · 73,461

MARKET RATE · 20DC

\$2,907

+142% year on year

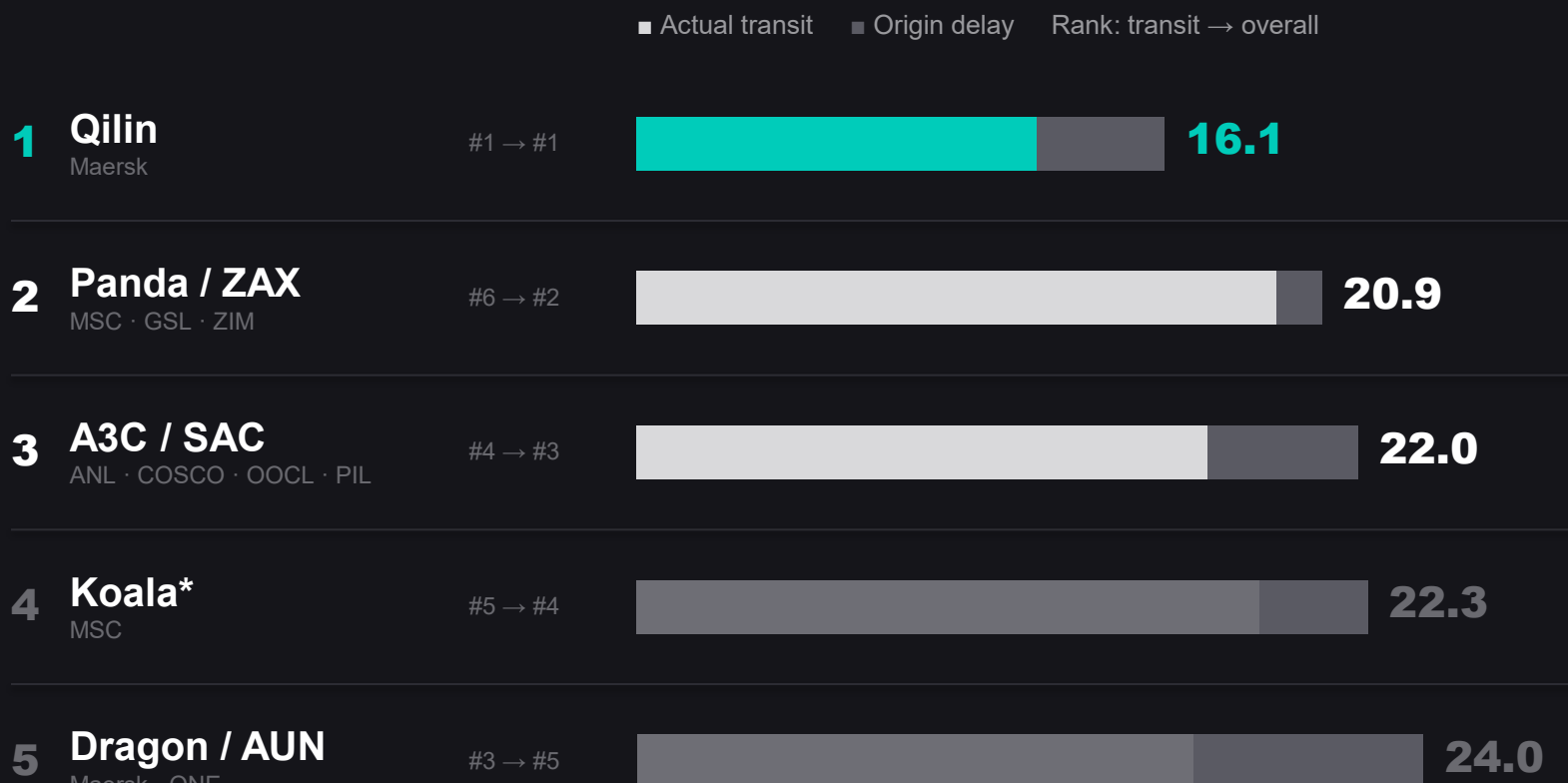


Oct 25 Oct 26

Up 9% over the last 4 weeks, but
flat (-1%) over the last 2

Fastest on the water isn't fastest overall

Top 5 of 11 services, Shanghai to Australia · actual transit plus origin departure delay, in days

**BEST OVERALL****Qilin****16.1 days**

12.2 days transit + 3.9 days origin delay

BIGGEST CLIMBER**Panda / ZAX****#6 → #2**

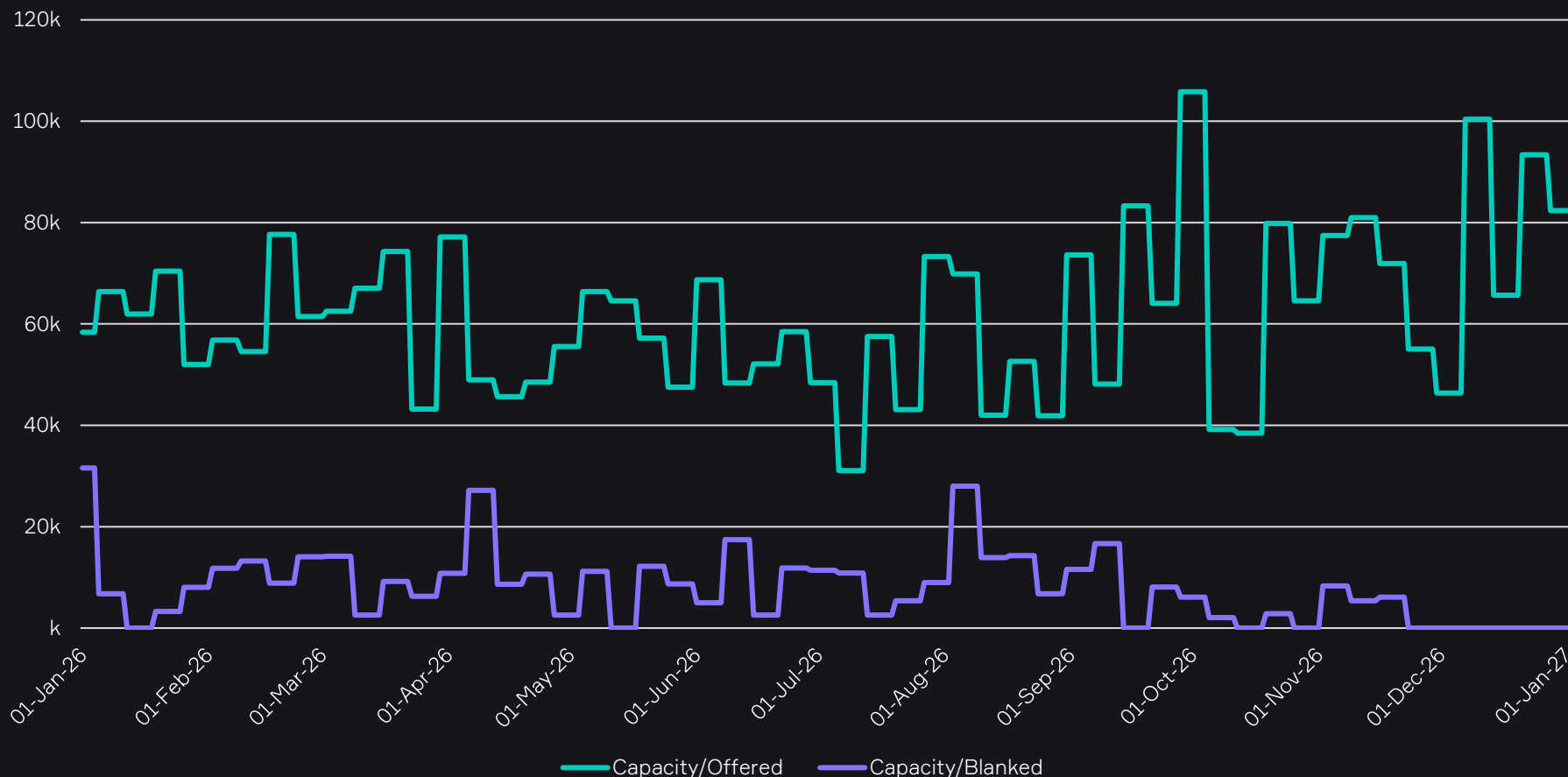
Only 1.4 days origin delay, so it overtakes faster ships

BIGGEST FALLER**Wallaby****#2 → #6**

2nd fastest on the water, but 8.3 days origin delay drops it out of the top 5

CAPACITY & DEMAND

Capacity – China to Australia (in TEU)



Our Notes:

- Capacity continued to be healthy out of Asia into Australia for the month of September.
- Consecutive typhoons, though, have created a knock-on effect with significant delays on major Chinese but also Southeast Asian hubs.
- October capacity also looks robust and hopefully the Golden Week lull, Will allow the carriers to bring some of their services back to the original proforma schedule.

CAPACITY & DEMAND

Blank Sailings China to AU

Week Blanked (Beginning)	Carrier	Service
40 (28 th Sep)	ANL, OOCL, COSCO	A3S
40 (28 th Sep)	CMA CGM, HL, Maersk	AAX-E/EAC/S2A/AU2
40 (28 th Sep)	Maersk	Qilin
41 (5 th Oct)	ONE, Maersk	AUN/Dragon
42 (12 th Oct)	PIL, OOCL	AAA1

ACCESS TO SPACE

Capacity v Demand Chart

- Good Supply: Book 2 weeks ahead
- Balanced: Book 3 weeks ahead
- Tight Supply: - Book 4 weeks ahead

Mode	Lane	Space	Equipment
Sea	China to ANZ	●	●
Sea	SE Asia to ANZ	●	●
Sea	USA to ANZ	●	●
Sea	EU to ANZ	●	●
Air	China to ANZ	●	
Air	USA to ANZ	●	
Air	EU to ANZ	●	

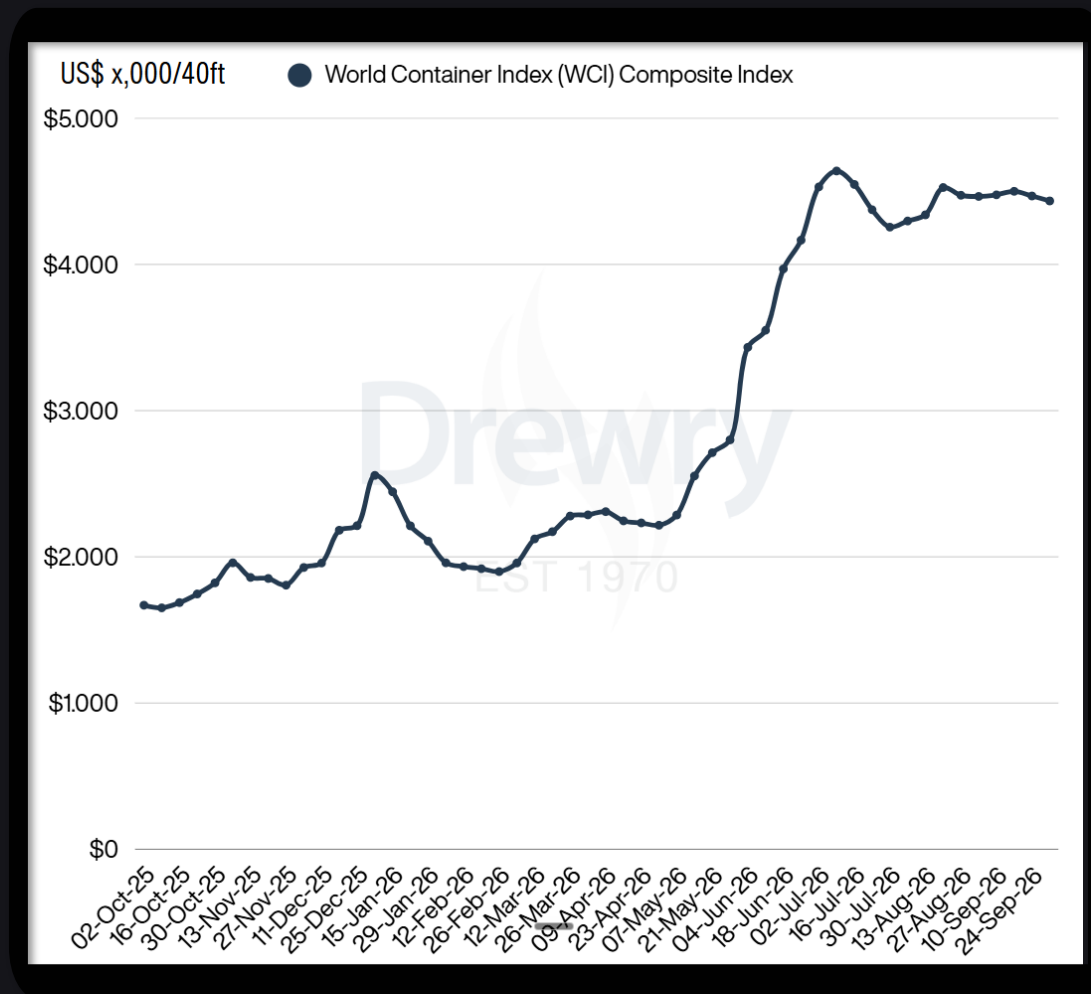
RATES

Drewry World Container Index

Our Notes:

The WCI has increased, then dipped over the past four weeks, and is currently at 4,434 USD/40ft.

Source: Drewry



RATES

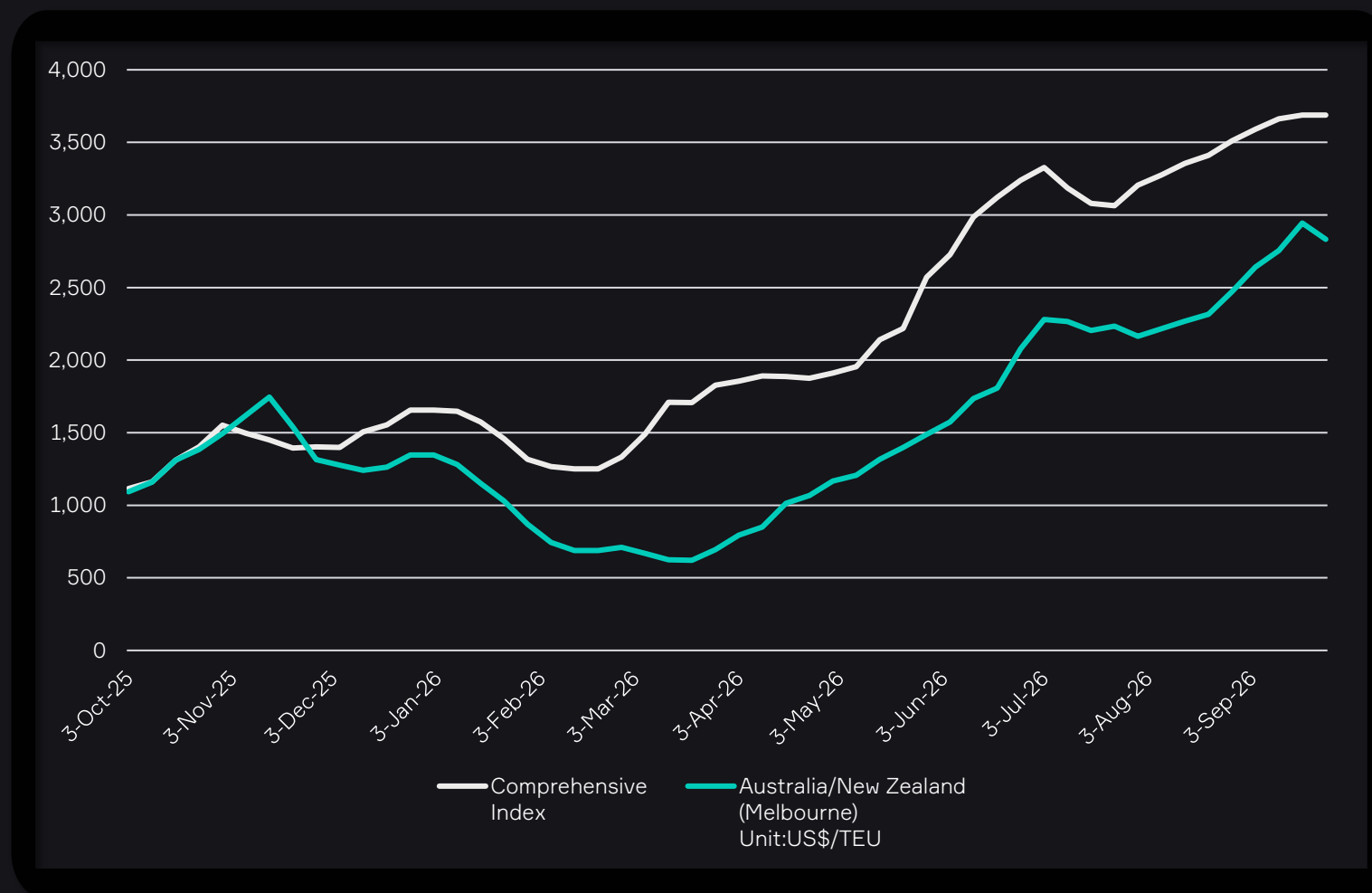
Shanghai Container Freight Index

Our Notes:

The SCFI index shows market rates from CNSHA sitting at:

Global Index – 3,687

AUNZ Index – 2,833 USD/TEU



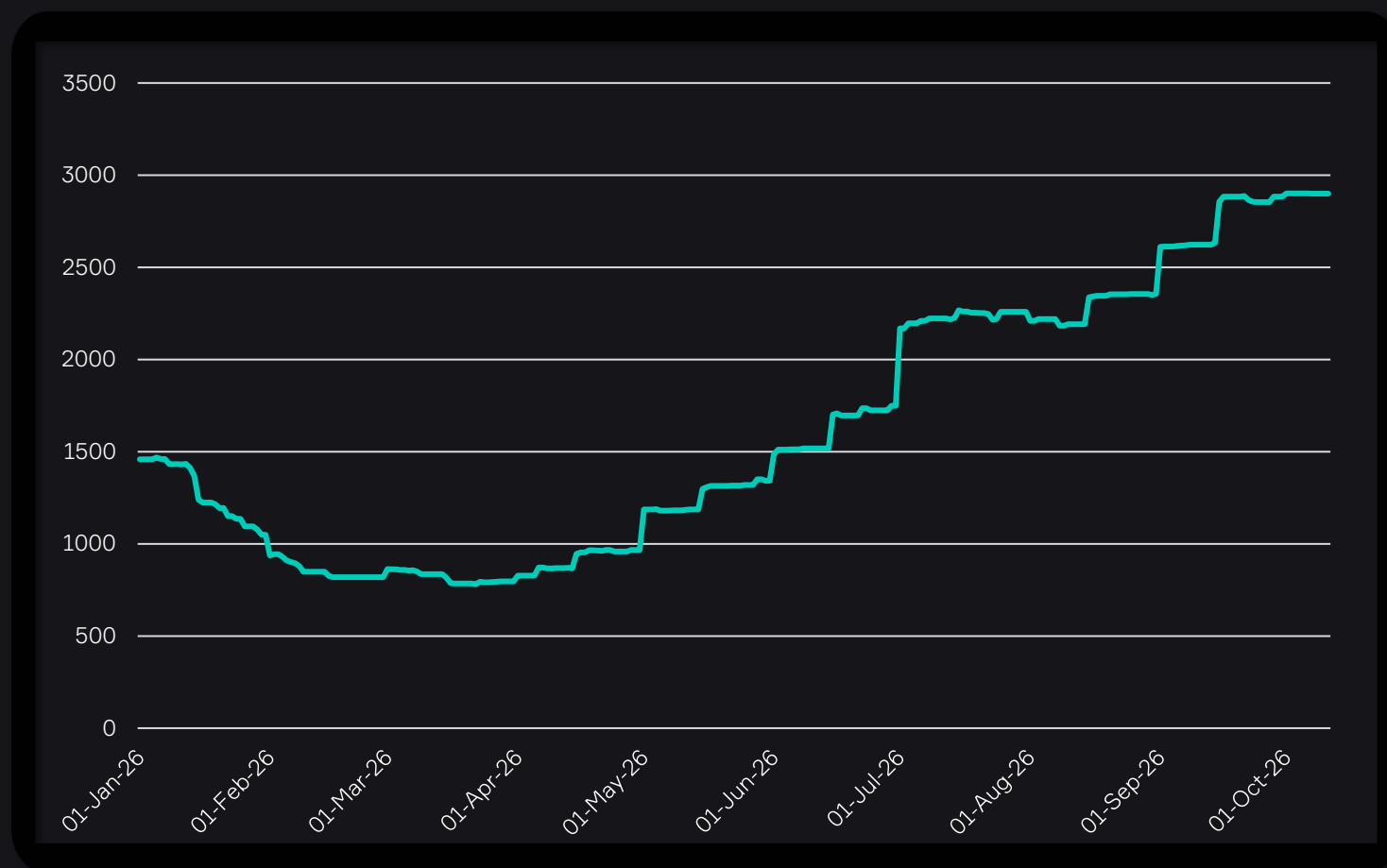
RATES

Xeneta Index Shanghai to AU

Our Notes:

Intelligence from Xeneta shows market rates from CNSHA to Australia sitting at approx. 2,901 USD/TEU

Note this is a raw freight rate without surcharges or local charges.



CARRIER PERFORMANCE

Average Transit Times Last 3 Months to SYD and FRE (in Days)

Service	From	To	Scheduled TT	Actual TT	Diff	Origin Delay	Dest Delay	Cancel
ANL - A3C COSCO - A3C OOCL - A3C PIL - SAC	Shanghai	Sydney	13.4	17.4	-4	-4.6	-7.8	38%
ANL - A3N CMA - A3NANL COSCO - A3N OOCL - A3N	Shanghai	Sydney	23.4	22.7	0.7	-4.9	-2.2	83%
ANL - ACX COSCO - ACX OOCL - ACX	Shanghai	Sydney	16.4	21.3	-4.9	-9.7	-10.8	57%
EMC - CAT HL - CAT PIL - STA SINO - CAT TSL - CAT YML - CAT	Shanghai	Sydney	21.8	26.8	-4.9	-5.9	-10.8	20%
EMC - NEAX HL - NAX HMM - A1X ONE - AUE	Shanghai	Sydney	19.5	20.4	-0.9	-8.8	-9.7	25%
GSL - ZAX MSC - Panda ZIM - ZAX	Shanghai	Sydney	24.8	19.5	5.2	-1.4	-0.5	67%
ML - Dragon ONE - AUN	Shanghai	Sydney	18.4	17	1.4	-7	-4.9	55%
ML - QILIN	Shanghai	Sydney	13.4	12.2	1.3	-3.9	-5.9	60%
MSC - Koala	Shanghai	Fremantle	13.5	19	-5.5	-3.3	-9.1	38%
MSC - Wallaby	Shanghai	Sydney	12.5	16.2	-3.7	-8.3	-12.2	23%
PIL - SAE TSL - CA2 YML - CA2	Shanghai	Sydney	17.3	24	-6.7	-8.2	-11.9	33%

Our advice to Supply Chain Managers

Sea Freight

- More services are now starting to go through the Suez Canal consistently, especially on the Asia to Europe trade lane
- No resolution yet in regards to the Hormuz Strait with tankers rather than container vessels being targeted by the Iranian regime
- Potential strike at the port of Hamburg could add additional delays in an already congested global environment

Air Freight

- Rates are still slightly elevated but not as high as previous years.
- Anticipate some upward rate pressure as those seeing sea freight constraints start to use make use of airfreight to alleviate these pressures.
- eCommerce has largely moved to charter flights which means commercial space not as constrained as previous years, with AI hardware now the main pressure on capacity.

What to Do?

- Continue to book well in advance especially out of China
- Check for any competitive FAK rates for the first half of the month, however if cargo is urgent, opt for the premium services
- Expectation is that the FAK rates from Asia, for the second half of the month, will increase, as they typically do after the Golden Week

Thank you

Want to discuss any of
these updates?

Contact

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