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TL;DR – Key market highlights

- Rates & Capacity: East Coast rates have eased following Golden Week, while Western Australian capacity remains constrained.
- November Outlook: Despite announced GRIs, several carriers are maintaining October pricing as Christmas shipping demand begins to shift.
- Congestion: Around 8.5% of global containership capacity is currently absorbed by delays, affecting schedule reliability.
- Christmas Shipping: Early bookings are strongly encouraged to minimise delays ahead of seasonal closures.
- Industry Developments: Qatar Airways will commence services to Western Sydney International Airport in December 2027.

October has brought some welcome relief to parts of the Asia-Australia freight market following China's Golden Week holiday. While additional capacity and improving port operations have eased some pressure on rates, ongoing congestion, schedule disruptions and cautious carrier pricing strategies continue to create uncertainty.
With the Christmas shipping window narrowing, early planning is becoming increasingly important to ensure cargo arrives ahead of seasonal closures.

RATES AND CAPACITY

Freight rates from China to Australia's East Coast have softened throughout October, supported by improved port operations, additional sailings and reduced demand following Golden Week. However, conditions remain considerably tighter for Western Australia, where limited capacity and ongoing transhipment delays continue to support higher rates.
Despite carriers announcing General Rate Increases (GRIs) of up to USD500 per TEU from 1 November, several major shipping lines have opted to maintain their late October pricing into early November. Strong booking volumes and limited additional capacity are supporting market stability, although demand is expected to moderate as the Christmas shipping window narrows.
With carriers continuing to manage capacity through blank sailings and selective vessel deployment, pricing conditions are likely to remain variable heading into the final months of the year.

CONGESTION & SCHEDULE RELIABILITY

Port conditions across Shanghai and Ningbo have improved following months of weather-related disruption, helping to restore vessel movements and release capacity. However, congestion remains widespread across the broader Asian shipping network, with vessel bunching, port omissions and delayed rotations continuing to affect schedule reliability.
Recent industry analysis indicates that approximately 8.5% of the global containership fleet, equivalent to around 3 million TEU, is currently absorbed by delays. With just 0.9% of the global container fleet sitting idle, there is limited spare capacity available to absorb further disruption.
Ongoing geopolitical tensions, alternative shipping routes and congestion through Southeast Asian transhipment hubs continue to place pressure on global shipping networks, particularly for Australian-bound cargo moving through Fremantle and Adelaide.

CHRISTMAS SHIPPING & NOVEMBER OUTLOOK

With Christmas approaching, the remaining shipping window is narrowing for Australian importers. While early November departures may still arrive in time for December deliveries, shipments departing later in the month face a greater risk of arriving during seasonal closures, particularly where congestion or transhipment delays affect transit times.
We strongly encourage clients to provide upcoming shipment forecasts and booking requirements as early as possible to help secure space and minimise the risk of delays ahead of Christmas closures.

Christmas Closure Reminder: Please keep the S.A.L. team informed of your business's Christmas closure dates, final delivery requirements and key contacts who will remain available over the holiday period. This will help us coordinate shipments and deliveries around your operating schedule.

INDUSTRY UPDATE: WESTERN SYDNEY INTERNATIONAL

Qatar Airways has announced plans to introduce services between Western Sydney International Airport and its Doha hub from 15 December 2027, initially operating three flights per week before increasing to daily services by the end of 2028.
The announcement marks another step in the development of Western Sydney's international aviation network, with the airport's 24-hour operating capability expected to support greater connectivity and future opportunities for international trade.

SAL INSIGHT

The post-Golden Week easing has provided some welcome breathing room, but market conditions remain subject to changing demand and carrier capacity management as the Christmas shipping window narrows. With shipping schedules still unpredictable, securing bookings early and communicating delivery deadlines will be essential to minimising disruption during the final months of the year.

Planning your Christmas shipments? Contact the S.A.L. team to discuss upcoming bookings, delivery deadlines and holiday arrangements.
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