Portcast

Transit Time Trends Report

(Q1 2026)

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Inside the Report

**This report is based on Portcast's historical transit time data across 108 global trade lanes and containers tracked on the platform.*

1 Q1 2026: The Quarter That Changed Transit Expectations

Freight rates were falling for seven consecutive weeks[1] through mid-February, and the market remained relatively stable with carriers actively managing capacity. Then, on 28 February, the Gulf conflict escalated, and the geopolitical crisis disrupted passage through the Strait of Hormuz. Within 72 hours, the quarter changed entirely.

What makes Q1 2026 unusual is not just the scale of disruption, but its speed and concentration. Unlike the gradual Red Sea re-routing that began in late 2023, this was an immediate hard stop on specific corridors.

Portcast tracked planned and actual transit times across 108 tradelanes throughout Q1. The data based on the containers tracked on our platform tells two distinct stories: structural delays on major global lanes that have quietly persisted for quarters, and event-driven disruption that hit Middle East corridors with sudden severity from early March. Both matter for planning.

Network-Wide Transit: What Was Observed

- The Middle East crisis created a two-tier market. This means the network split into two distinct groups. Lanes connected to or passing through the Middle East saw an increase in transit times compared with other lanes. In early March, this gap widened. Lanes touching the Middle East began to diverge from the rest of the network, with performance metrics such as transit time and reliability moving in a very different direction than on unaffected routes.

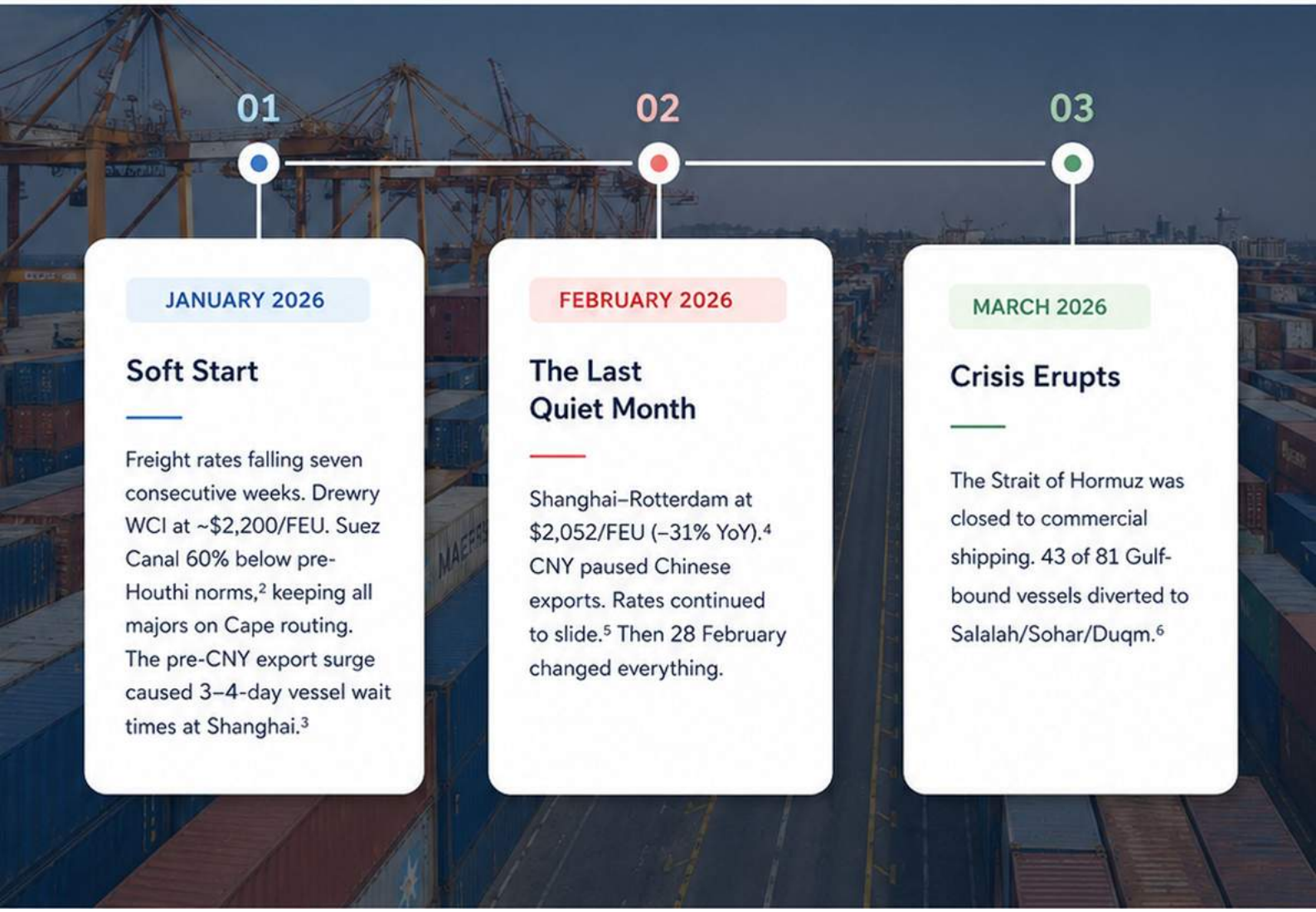
- Asia–Europe remains structurally elevated. All major carriers maintained Cape of Good Hope routing throughout Q1. There is no evidence of a sustained Suez Canal return in voyage count data.

2 The Middle East Crisis: Q1's Defining Disruption

When the Gulf crisis began on 28 February 2026, the Strait of Hormuz effectively closed to commercial shipping. Unlike the Houthi-driven disruption in the Red Sea, which unfolded over weeks, this was an immediate, near-total halt in specific corridors.

For supply chain teams managing cargo into or out of the Middle East, the practical consequences were stark: longer transits, collapsed schedule reliability, and booking commitments that became unreliable overnight.

How The Quarter Unfolded



3 Standard Trade Lane Performance: Q1 2026

Beyond the Middle East crisis, Q1 data shows a consistent underlying pattern across major global lanes: carrier-quoted schedules are persistently optimistic. The five lanes below account for the largest share of tracked shipments in the Portcast dataset. Each tells a version of the same story: the plan-versus-actual gap did not close in Q1 and, in several cases, widened over the quarter.

Before we dive into lane-wise insights, here are some definitions to understand the report better:

Actual Transit Time: The number of days between a container's actual departure from the Port of Loading and its actual arrival at the Port of Discharge. This reflects the actual duration of the container's maritime journey.

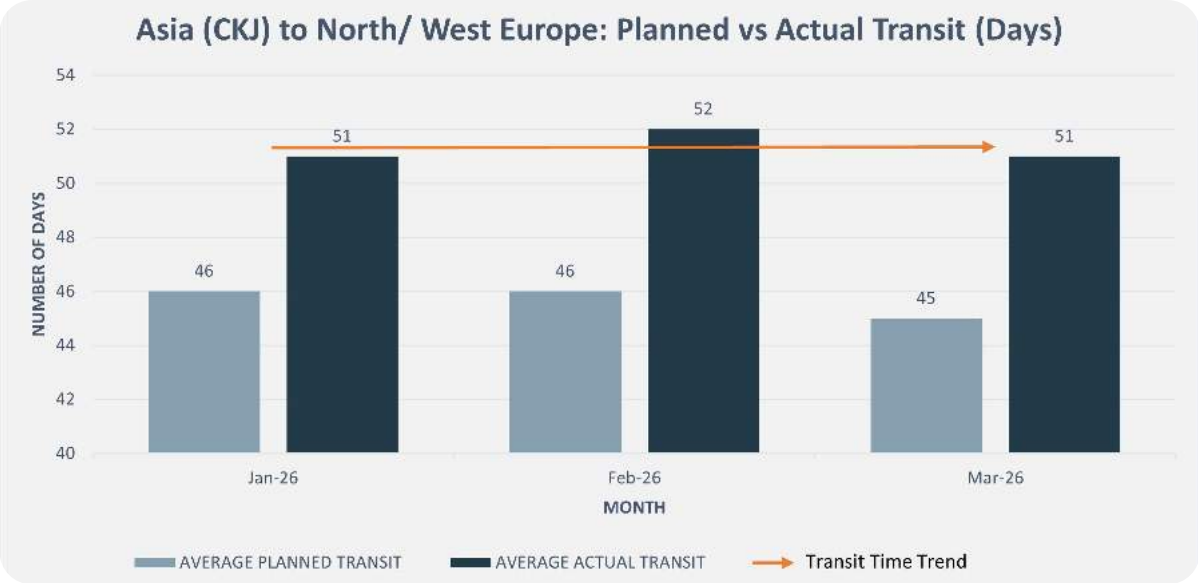
Carrier Planned Transit Time: The number of days between a container's scheduled departure from the Port of Loading and its scheduled arrival at the Port of Discharge, as planned by the carrier prior to the journey. This represents the carrier's committed service timeline.

Data Coverage Note: For this report, our data covers containers that arrived at the Port of Discharge between January 2026 and March 2026 (inclusive). Impacts from any ongoing disruptions or crises may not be fully reflected, as affected containers could still have been mid-journey at the time of the data cutoff.

A Asia (China-Korea-Japan) → North/West Europe

Q1 average: 51 days actual vs. 46 days planned | Deviation: +5 days

Carrier schedules on the Asia (CKJ)–North/West Europe lane remained at 46 planned days throughout Q1 2026, but actual transits stayed at 51–52 days with no sign of improvement.



Source: Portcast data. The shaded band shows the consistent plan-vs-actual gap. Planned transit held flat at 46 days across the quarter; actual ranged 51–52 days.

Industry Perspective:

Carriers that briefly considered returning to Suez shifted back to full Cape routing after 28 February as conditions remained unstable. Slow steaming at 16–17 knots, compared to the earlier 19–20 knots, weather around the Cape, and operational bottlenecks in European ports further extended transit times on the lane.

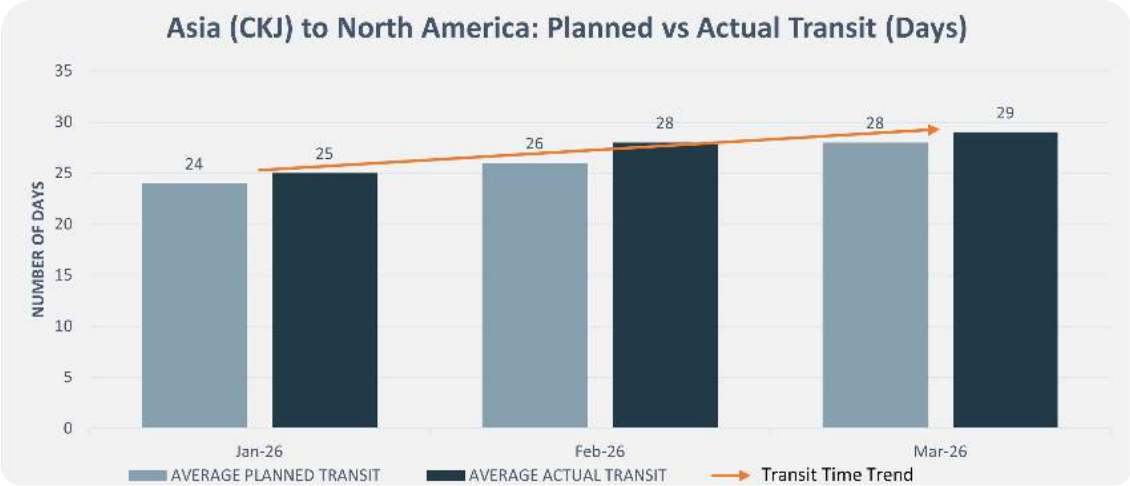
Operational takeaway: ***Longer transit is the baseline for this lane, not an exception. Planning against a 46-day schedule on this lane consistently builds in a 5-day error.***

Q2 2026 planning implication: ***Apply a minimum 6-day buffer above carrier-quoted schedules. Monitor whether any carriers formally revise their published benchmarks in Q2 following sustained deviation.***

B Asia (China-Korea-Japan) → North America

Q1 average: 28 days actual vs. 26 days planned | Deviation: +2 days

Carrier schedules on the Asia (CKJ)–North America lane remained relatively stable through Q1 2026, with planned transits increasing slightly from 24 to 28 days. Actual transits tracked closely but stayed consistently 1–2 days above plan, ending the quarter at 29 days.



Source: Portcast data. Note the progressive widening of the gap through the quarter, with March showing both higher planned and higher actual transit.

Industry Perspective:

The January gap was driven by residual pre-Chinese New Year congestion at origin ports such as Shanghai and Ningbo, where elevated export volumes in late December and early January led to rolled cargo and longer berth waiting times.

February conditions remained tight despite the seasonal slowdown in China during the Lunar New Year period. While origin pressure eased, transpacific capacity was constrained by blank sailings and network adjustments, which limited schedule recovery.[7] By March, volumes rebounded quickly as factories resumed, and the combined effect of returning demand and already elevated inventory cycles at USWC ports kept actual transits above plan. The steady increase in both planned and actual transit times through the quarter reflects carriers adjusting schedules upward in response to persistent network pressure rather than a normalization of conditions.

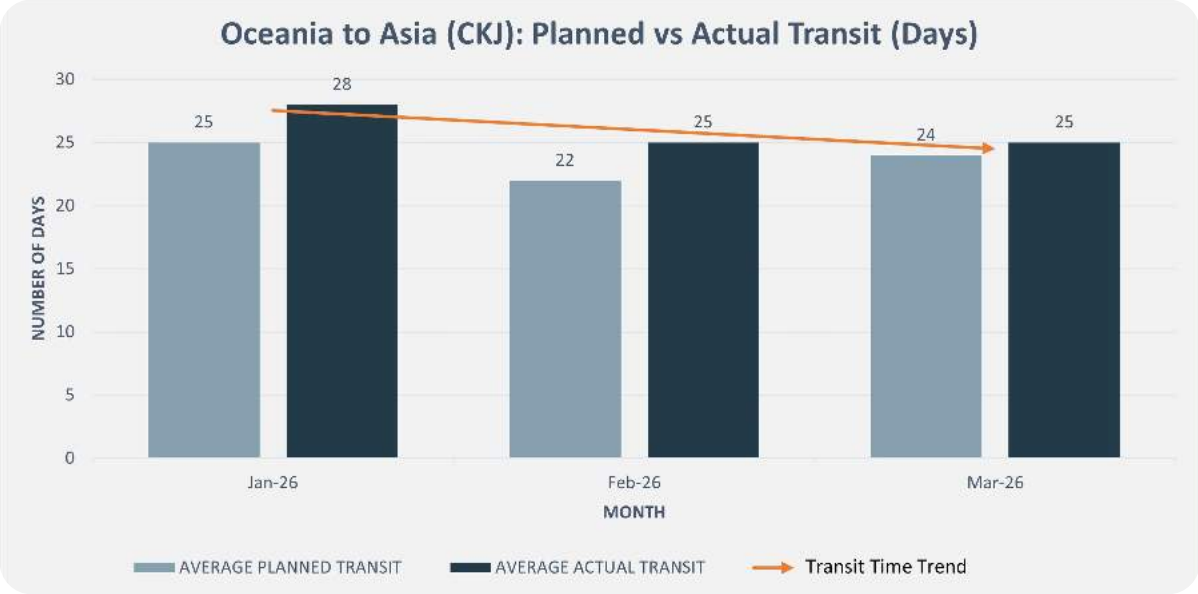
Operational takeaway: ***This lane remains relatively predictable compared to others, with deviations contained within a 1–2 day range. However, the consistency of the gap indicates a structural buffer built into operations rather than true schedule reliability.***

Q2 2026 planning implication: ***Plan with a minimum 2-day buffer above carrier schedules for this lane. Closely monitor US West Coast port dwell times, chassis availability, and yard utilization. Watch for shifts in import volumes linked to tariff developments and inventory cycles.***

C Oceania → Asia (China-Korea-Japan)

Q1 average: 26 days actual vs. 24 days planned | Deviation: +2 days

Carrier schedules on the Oceania–CKJ lane held steady at 22–25 planned transit days through Q1 2026, but actual transits ran roughly two days longer on average.



Source: Portcast data. The shaded band shows the consistent plan-vs-actual gap. Planned transit ranged 22–25 days; actual ranged 25–28 days across Q1.

Industry Perspective:

The widest gap came in January, when the pre-Chinese New Year cargo rush at major Chinese export gateways including Shanghai, Ningbo, and Shenzhen, overwhelmed vessel allocations, pushing cargo onto later sailings[8], while Australian load ports, including Sydney, Brisbane, and Melbourne, contended with container shortages.[9]

February brought some relief as Chinese factory activity slowed, reducing inbound pressure at CKJ ports, but blank sailings kept actual transits above plan. March saw improvement as backlogs cleared and schedules stabilized.

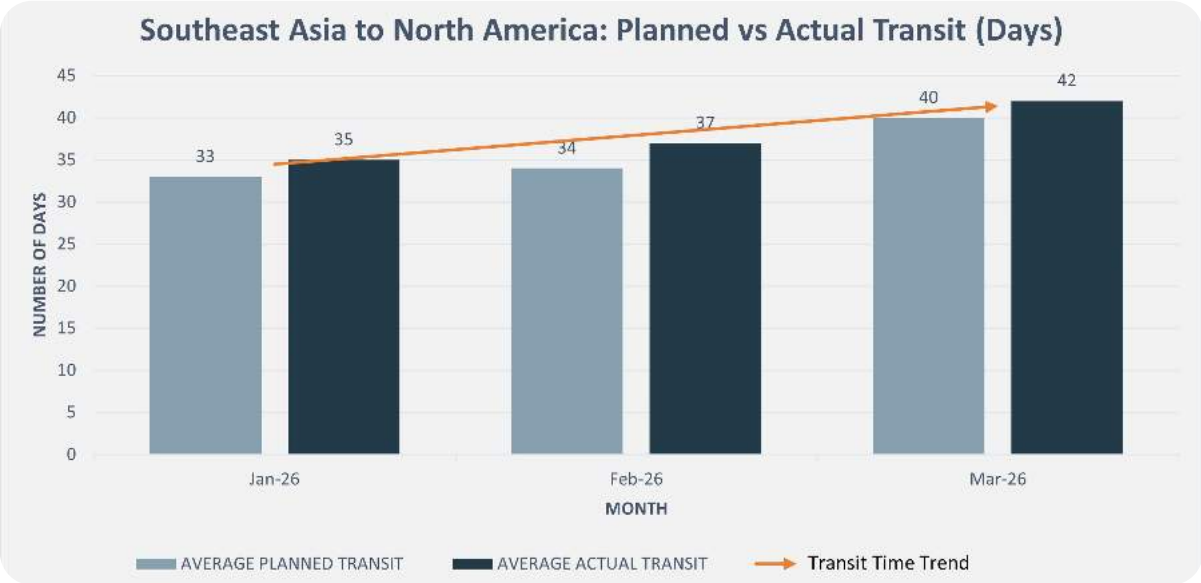
Operational takeaway: ***A 2-day overrun is the consistent baseline on this lane, not a one-off. Planning against carrier-quoted schedules without buffer builds a structural error into inbound lead times, particularly in CNY-adjacent months***

Q2 2026 planning implication: ***Apply a minimum 3-day buffer above carrier-quoted schedules. As CKJ port congestion eases in Q2 and blank sailings normalize, monitor whether reliability improves before reducing buffers.***

D Southeast Asia → North America

Q1 average: 38 days actual vs. 36 days planned | Deviation: +2 days

Carrier schedules on the SEA–North America lane held steady at 33–40 planned transit days across Q1, depending on the port pair and service. Actual transits were 2–3 days longer each month, with the gap widening in March.



Source: Portcast data. The shaded band shows the consistent plan-vs-actual gap. Planned transit ranged 33–40 days; actual ranged 35–42 days across Q1.

Industry Perspective:

January overruns were driven by pre-Chinese New Year cargo surges at Singapore, Port Klang, and Ho Chi Minh City. Yard utilization rose sharply as exporters rushed shipments ahead of the February 17 shutdown.[10]

February saw a brief easing as volumes dropped, but blank sailings on transpacific routes limited departures and kept transit times elevated. By March, actual transits reached 42 days against 40 planned, as factories resumed and a backlog of pent-up cargo hit ports across China and Southeast Asia simultaneously[11], compressing available vessel space on transpacific services and extending dwell times at Los Angeles and Long Beach into the post-holiday recovery window.[12]

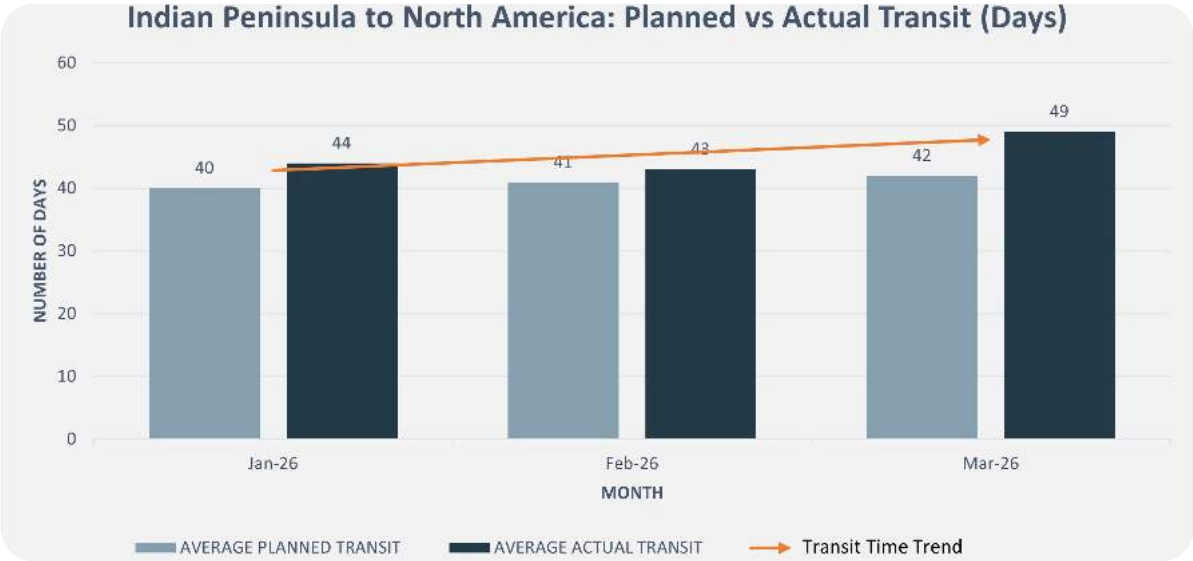
Operational takeaway: ***Actual transit times increased by 7 days from January to March, while planned times rose at the same pace. The gap stayed the same, but the overall delay became larger.***

Q2 2026 planning implication: ***Apply a minimum 3-day buffer above quoted schedules. Watch Singapore yard utilization as a leading indicator. Congestion there typically translates into 4–6 days of downstream delays at USWC ports within 2–3 weeks.***

E Indian Peninsula → North America

Q1 average: 45 days actual vs. 41 days planned | Deviation: +4 days

Planned transits on the Indian Peninsula–North America lane ranged from 40 to 42 days across Q1 2026, but actual transits were higher in January and March, with a brief improvement in February. February improved, with actual transits at 43 days versus 41 planned, as lower volumes during CNY eased pressure at hubs. March then worsened to a 7-day overrun, with actual transits at 49 days versus 42 planned.



Source: Portcast data. The shaded band shows the plan-vs-actual gap. Planned transit ranged 40–42 days; actual ranged 43–49 days. March deviation widened materially on the post-CNY surge and the US West Coast congestion.

Industry Perspective:

The lane's complexity, which requires a transshipment relay through hubs like Colombo, Singapore, or Jebel Ali before the transpacific leg, means delays can build at multiple points.

Operational takeaway: ***This lane has two legs, from origin to a transshipment hub and then to the US West Coast, which creates two points where delays can build. February's near-on-plan performance shows it can run close to schedule under stable conditions, but the Q1 average overrun of about 4 days highlights how quickly delays increase when both legs face pressure at the same time.***

Q2 2026 planning implication: ***Apply a minimum 5-day buffer above carrier-quoted schedules, increasing to 7 days for March-equivalent demand peaks. Monitor Colombo and Jebel Ali yard utilization. If either hub exceeds 85% utilisation, treat scheduled relay connections as at-risk and build contingency into downstream delivery commitments.***

4 Cross-Lane Summary

Q1 2026 showed three distinct delay patterns across major trade lanes, each with different planning implications.

Structural delays remained firmly in place on long-haul lanes such as Asia (CKJ) to North/West Europe and Asia (CKJ) to North America. These lanes continue to operate with consistent gaps between planned and actual transit times. On Asia–Europe, the deviation is now a reset baseline driven by Cape routing and slow steaming. On transpacific routes, smaller but persistent gaps reflect ongoing congestion and inland bottlenecks rather than temporary disruption. These are predictable, repeatable, and should be treated as planning constants rather than exceptions.

Seasonal delays were most visible on shorter regional lanes like Oceania to Asia (CKJ). Here, the Q1 deviation was closely tied to Chinese New Year demand cycles, including pre-holiday export surges and post-holiday normalization. These delays are not permanent but recur annually, making them cyclical and easier to anticipate with the right buffers.

A third pattern emerged on more complex, relay-dependent lanes such as Southeast Asia to North America and the Indian Peninsula to North America. These lanes combine structural inefficiencies with seasonal amplification. Their reliance on transshipment hubs introduces a baseline level of delay risk, which then escalates sharply during volume surges. This was evident in Q1, where relatively stable averages masked underlying volatility, especially during post-CNY demand rebounds.

The key takeaway is that not all delays behave the same way. Structural lanes require baseline adjustments to planning assumptions. Seasonal lanes require calendar-driven buffers. Hybrid lanes demand closer monitoring, as they are most sensitive to shifts in volume and network pressure.

Trade Lane	Q1 Avg Deviation	Delay Type	Q2 Risk
Asia (CKJ) → North/West Europe	+5 d	Structural	High
Asia (CKJ) → North America	+2 d	Structural	Medium
Oceania → Asia (China-Korea-Japan)	+2 d	Seasonal	Medium
Southeast Asia → North America	+2 d	Structural + Seasonal	Medium
Indian Peninsula → North America	+4 d	Structural	High

Structural: *Persistent, multi-quarter gap between plan and actual that has not closed despite stable operating conditions.*

Seasonal: *Recurring, calendar-driven delay patterns (e.g., agricultural export peaks, festive surges) that repeat predictably year on year.*

Things The Data Makes Clear

The Q1 data is specific enough to draw conclusions that are directly actionable, not just observational:

- **Carrier schedules are not the only planning tools.** Across every major lane in Q1, carrier-published planned transit consistently understated actual transit. The gap is a systematic bias that compounds when teams use it as the basis for customer commitments, inventory buffers, and downstream handoffs.

- **The Middle East is a different planning category.** Until the Strait of Hormuz reopens or alternative routing norms stabilize, Middle East lanes cannot be planned on the same horizon as other corridors. Shorter commitment windows, wider buffers, and active monitoring of rerouting are necessary, not optional.

- **Cape of Good Hope routing is the new structural baseline.** Two years of voyage count data show no meaningful recovery in Suez Canal traffic. The post-crisis routing reality is now baked into transit time benchmarks.

5 What Q1 Tells Us About The Quarter Ahead

The consistent finding across every lane in this report is that the gap between planned and actual transit is not primarily a disruption problem. It is a data problem. Carrier schedules are built on optimistic assumptions that are updated infrequently. Actual vessel behavior tells a different story, and it tells it in real time.

Q2 2026 inherits the full weight of what Q1 left unresolved. The Strait of Hormuz remains effectively closed to Western mainline services, and it is hard to predict how the situation will evolve.

The supply chain teams that navigated Q1 best were those working from dynamic, lane-level ETA data rather than static carrier benchmarks. They built buffers calibrated to actual deviation, not hoped-for recovery.

Portcast publishes this report every quarter to help supply chain and logistics teams plan with data, not assumptions. Beyond predictive ETAs, Portcast enables global BCOs and forwarders to have both operational and financial visibility through an exception-first command center and automated freight audits that surface delays, risks, and billing discrepancies in real time.

If you manage lanes covered in this report, as well as others, and want to benchmark your current planning against predictive insights and improve cost control, we would be happy to walk through it with your team.

Get in touch

References

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[9] Freight Market Update December 2025 | TFG Global

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[11] San Pedro Bay Dwell Times Spike as Vessel Calls Collapse Ahead of Lunar New Year | Container Management

[12] San Pedro Bay Dwell Times Spike as Vessel Calls Collapse Ahead of Lunar New Year | Container Management

Disclaimer: The transit time data for the five lanes highlighted in the report is based on containers tracked on Portcast's platform. All figures represent quarterly averages unless otherwise noted. The broader industry perspective is based on publicly available sources and does not represent Portcast's sole opinion. All sources are cited where applicable.

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