

Cargo Movement Update #293¹

Date: 2 August 2026

Weekly Snapshot

Table 1 – Port volumes and air cargo flows, week on week

Flows	Current ²			Previous ³			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	39,639	45,159	84,798	36,780	47,290	84,070	↑1%
Air Cargo (tons)	4,070	2,416	6,486	4,248	2,505	6,752	↓1%

Monthly Snapshot

Figure 1 – Cyclical⁴ monthly cargo volume, year on year (most metrics: June '25 vs June '26, % growth)

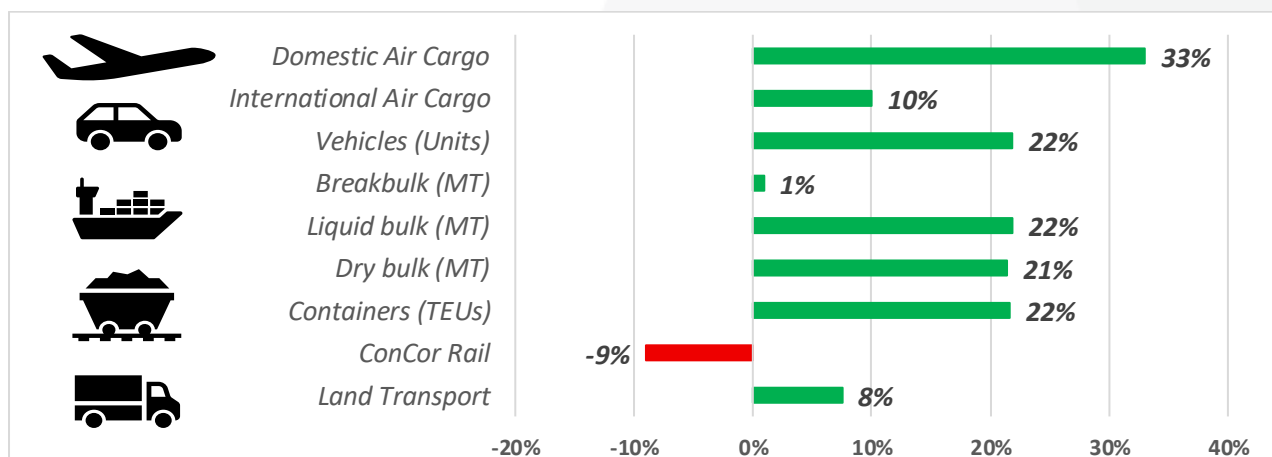
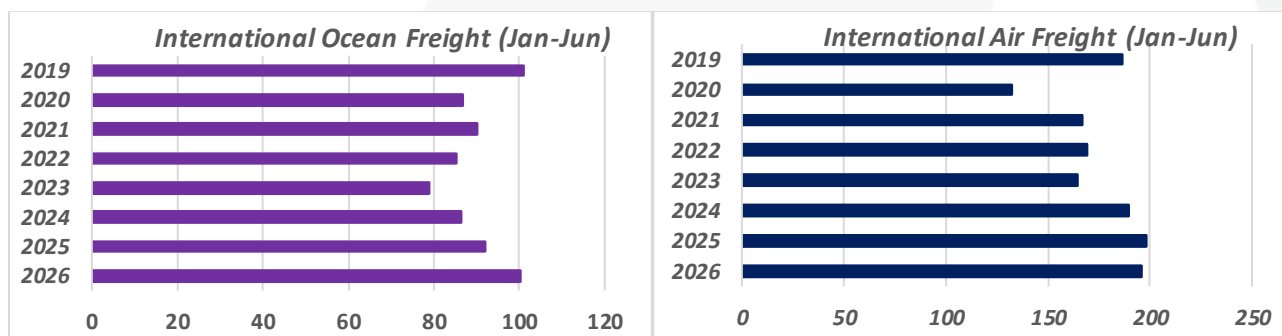


Figure 2 – Year-to-date flows 2019-2026⁵: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **12,114 TEUs** was handled per day, with **12,943 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2,648** containers, down by **↓17%** from last week.
- Cross-border queue: **↑1.1 hrs**; transit: **↑0.9 hrs**; SA borders: **~10.8 hrs (↑16%)**; SADC: **~7.2 hrs (↑11%)**.
- World merchandise trade remained resilient in Q12026, with volumes rising by **↑1.9% (q/q)** & **↑3.2% (y/y)**.
- Suez diversions are easing (**↓23%** vs peak ~Q1'26) – now to fewer than **300 containerhips around the Cape**.
- Global air cargo is down by **↑3% (w/w)**, as average rates stabilised at **\$3.02/kg** driven by rising jet fuel.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 293rd update.

² 'Current' means the last seven days (a week's) of available data.

³ 'Previous' means the preceding 8-14 days (a week) of available data.

⁴ 'Monthly' means the last months' worth of available data compared to the same month in the previous year. Most: June vs. June.

⁵ Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **12,114 TEUs** was handled daily, an increase from **12,010 TEUs** the previous week.

Port operations showed an improvement in volumes in the Western Cape, with both CTMPT and the AGL terminal servicing vessels following a few quiet weeks. In contrast, the container terminal showed a decline in waterside volumes, due to poor weather conditions. In the Eastern Cape, operations stabilised with both terminals reporting actual waterside volumes close to the targeted volumes. In Durban, waterside volumes showed an increase across all container handling terminals, though congestion continues to plague the Durban Gateway Terminal. Throughout the week, DGT experienced some challenges relating to an upgrade to the Navis System, along with worsening congestion on the waterside, despite volumes still being relatively healthy.

World merchandise trade remained resilient in Q1 2026, with volumes rising by **↑1.9%** quarter-on-quarter and **↑3.2%** year-on-year, while trade values increased by **↑11%** annually. Growth was driven disproportionately by AI-enabling goods, whose value expanded by more than **↑40%** year-on-year. Regional performance was uneven: Middle Eastern exports and imports contracted sharply, while Africa recorded weaker export volumes but double-digit growth in trade values. The WTO expects the effect of Strait of Hormuz disruptions to become more evident in second-quarter data.

Global shipping conditions remained volatile. The SCFI rebounded by **↑4.7%**, supported by Asian demand, congestion and equipment shortages, while **fewer than 300 containerships** remained diverted around the Cape. Reliability volatility remained particularly elevated on several South American, African and Middle Eastern trades. *Drewry's WCI* edged up by **↑1%** to **\$4,297/40 ft**, although charter rates remained elevated, with the *Harpex* at **2,343 points**.

Global air cargo demand softened in late July, with worldwide chargeable weight declining by **↑3%** week on week, led by contractions from Africa and Asia Pacific. Despite lower volumes and a modest reduction in capacity, the global average rate stabilised at **\$3.02/kg** as rising jet-fuel costs supported pricing.

On the N4 corridor, movements increased significantly – by around **118 trucks a day**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**). Truck volumes through the border post increased to **1,614 HGVs per day** (**↑7%**, w/w). Overall, queue times **were mostly stable** at an average of **~4.5 hours** (**↓2%**) at the border. The average processing times **were also stable** at an average of **~4.3 hours** (**↓2%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time increased by around **an hour** from last week, as transit time increased by approximately the **same magnitude**. The median border crossing times at South African borders increased by **an hour and a half**, averaging **~10.8 hrs** (**↑16%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) also increased – by about **three-quarters of an hour**, averaging **~7.2 hrs** (**↑11%**). This week, on average, **three** SADC borders again took more than a day to cross, namely Beitbridge, Chirundu, and Kasumbalesa (the worst affected, taking around **four days** to cross from the **Zambian side**).

Other regional road and cross-border developments included **(1)** the introduction of enhanced queue-management measures at Beitbridge to separate document-ready trucks from vehicles unable to proceed, **(2)** the temporary closure of Qacha's Nek following heavy snowfall and the introduction of stricter vehicle-

equipment requirements in Mozambique, and **(3)** renewed enforcement by Namibia's Roads Authority of axle-load, dimensional, weighbridge and abnormal-load permit requirements.

In closing, encouragingly, Durban Gateway Terminal has shared volume data for the first time since its formation in early 2026, with throughput currently trending **↑9%** (y/y). This provides a more constructive medium-term picture than the operational difficulties reported over the past fortnight, including equipment constraints, extended truck-staging times and port congestion. The next priority is to combine DGT data with confidential transporter information across the container journey—from vessel berthing and stacking to booking, port dwell, upliftment and empty return. This empirical, collaborative approach should identify the principal pressure points, support targeted simulation and guide practical interventions across terminals, transporters, shipping lines, back-of-port operations and rail. Sustainable improvement will ultimately require shared data, accountability and coordinated action across the logistics network.

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1. Ports Update

This section provides an overview of the flow of containerised cargo through our commercial ports.

a. Container flow overview

The following tables indicate the container flows reported for the last seven days. The reporting period runs from Monday to Sunday:

Table 2 – Container Ports – Weekly flow reported for 27 July to 2 August (measured in TEUs)

7-day flow reported (27/07/2026 – 02/08/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Gateway Terminal (Pier 2)	4,603	32,222	↓4%
New Pier (Pier 1)	2,141	14,984	↑2%
Cape Town Container Terminal	1,636	11,451	↓14%
Ngqura Container Terminal	2,210	15,472	↑20%
Port Elizabeth Container Terminal	377	2,638	↓44%
Other	1,147	8,031	↑67%
Total	12,114	84,798	↑1%

Source: Calculated from TPT, 2026. Updated 02/08/2026.

An average of ~12,511 TEUs (↑1%) was handled per day for the last week (27 July to 2 August, Table 2). Consequently, throughput was below the projected average of ~13,258 TEUs (↓9% actual versus projected). For the coming week, an increased average of ~12,943 TEUs (↑7%) is predicted to be handled (3 to 9 August, Table 3).

Table 3 – Container Ports – Weekly flow projected for 3 July to 9 August (measured in TEUs)

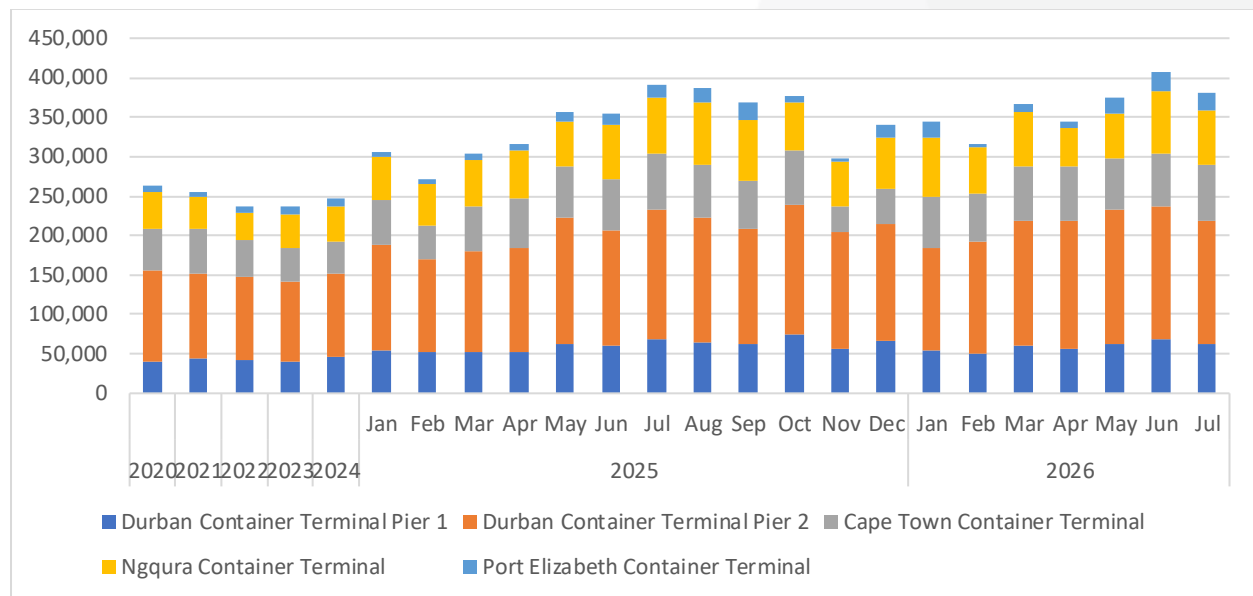
7-day flow projected (03/08/2026 – 09/08/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Gateway Terminal (Pier 2) ⁶	5,351	37,459	↑16%
New Pier (Pier 1)	2,105	14,737	↓2%
Cape Town Container Terminal	1,902	13,312	↑16%
Ngqura Container Terminal	2,264	15,848	↑2%
Port Elizabeth Container Terminal	425	2,976	↑13%
Other	896	6,270	↓22%
Total	12,943	90,602	↑7%

Source: Calculated from TPT, 2026. Updated 02/08/2026.

The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

⁶ Projected volumes are for the same time period in 2025, as projected data for 2026 is not available.

Figure 3 – Monthly flow reported for total container movement (thousands, 2020 to present, m/m)



Source: Calculated from TPT, 2026, and updated 02/08/2026.

The following table shows the average vessel time (in days) at anchorage and the average time at berth (in days) at our respective ports and terminals as of Wednesday afternoon:

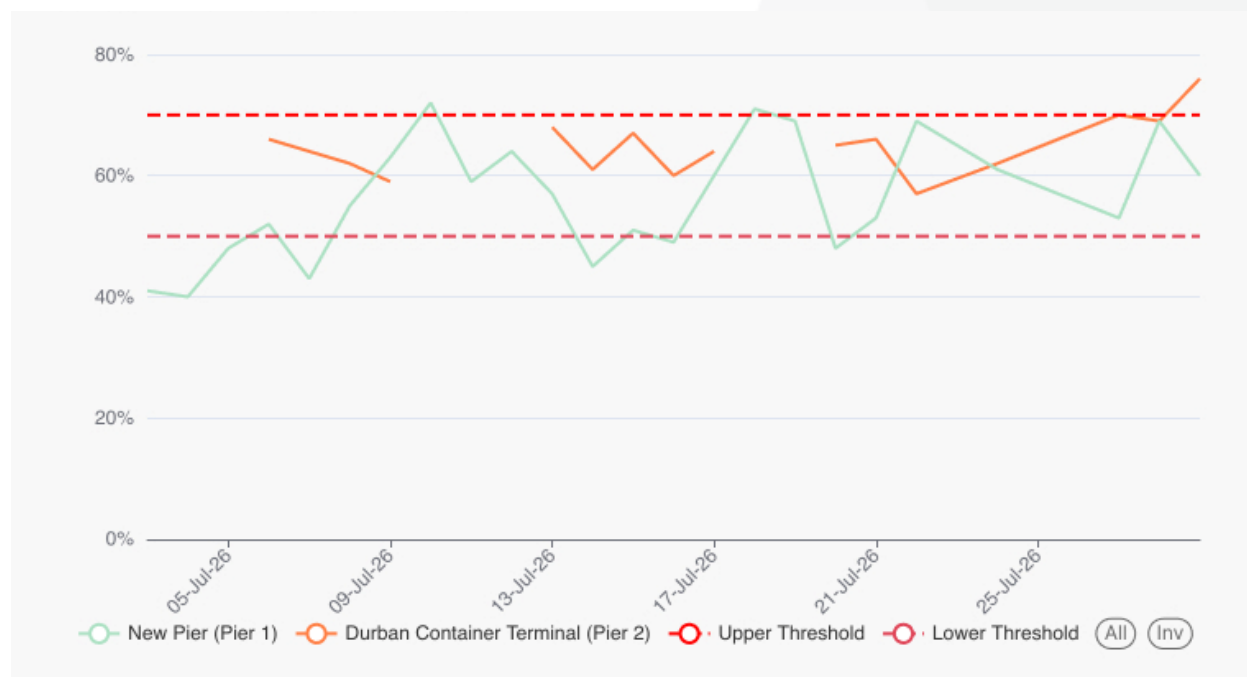
Table 4 – Vessel Dwell Time

Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.5	2.3
Cape Town	FPT	0.8	3.0
Cape Town	MPT	1.6	1.3
Durban	Pier 2	1.3	3.5
Durban	Pier 1	0.9	1.9
East London	MPT	0.2	3.1
Ngqura	NCT	2.4	2.6
Port Elizabeth	PECT	4.4	1.3

Source: Calculated from Marine Traffic AIS data, 2026. Updated 03/08/2026.

The following figure shows daily stack occupancy in Durban across the last two weeks or so:

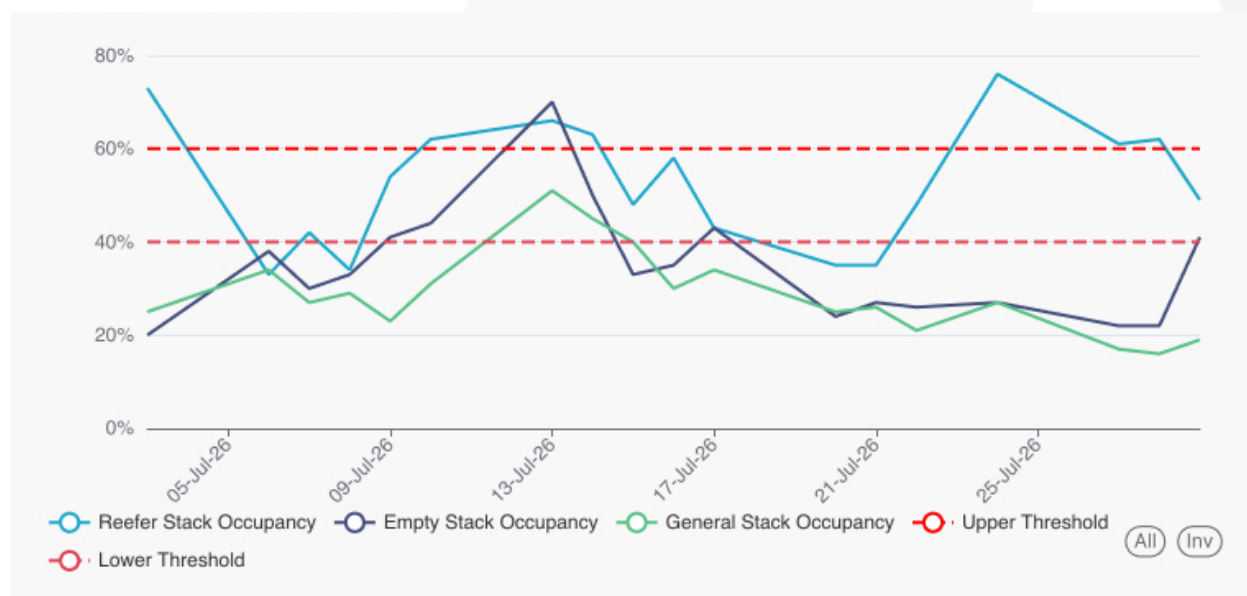
Figure 4 – Stack occupancy in Durban, general-purpose containers (3 July to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 02/08/2026.

The following figure shows daily stack occupancy in Cape Town over a similar period.

Figure 5 – Stack occupancy in CTCT, GP, reefer, and empty stack (3 July to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 02/08/2026.

b. Summary of port operations

i. Cape Town

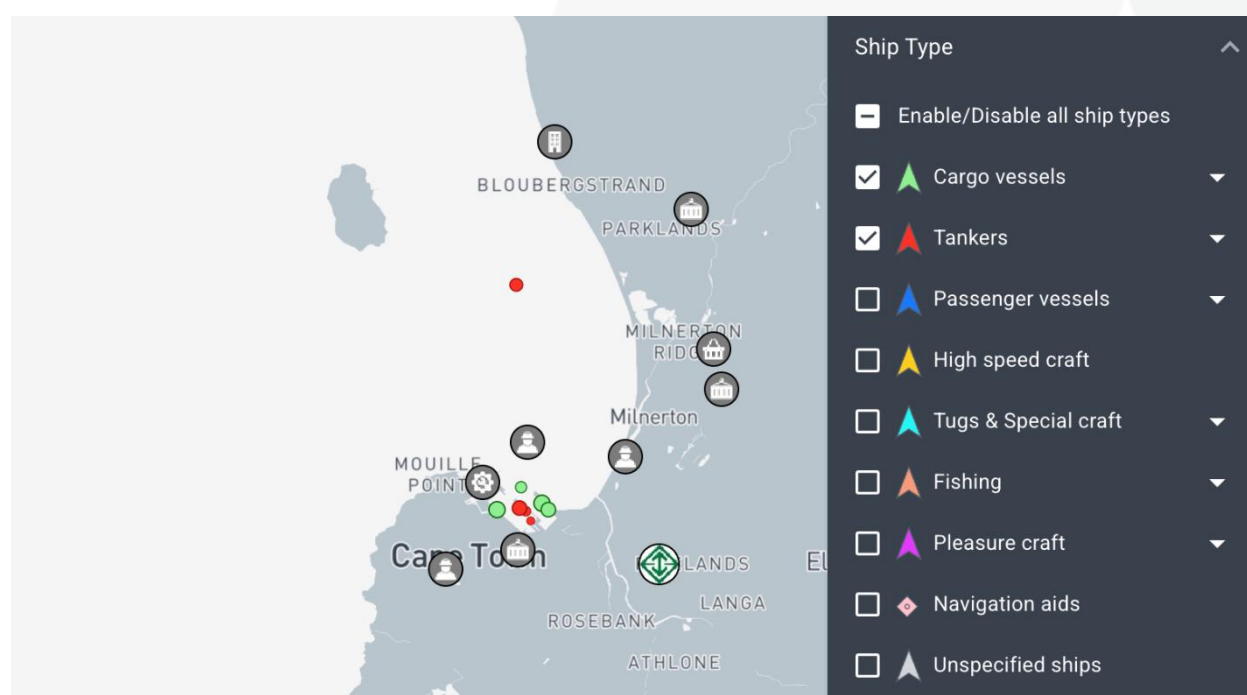
Cape Town Container Terminal showed a slight decline in waterside volumes, along with an increase in vessel turnaround time, with an average time at anchorage of 35 hours and 44 hours at berth. The terminal

reported weather delays early in the week, which likely contributed to the reduction in port performance. Equipment availability remained consistent, with an average of seven out of nine cranes and 28 out of 32 RTGs available throughout the week. The terminal reported an average of one vessel waiting at anchorage throughout the week, paired with the strong equipment availability, limited congestion is anticipated for the coming week.

After no vessel calling for the previous week, the Cape Town Multi-Purpose Terminal had an upturn in operations, with two vessels calling during the reporting week. The terminal reported 1,380 container moves, not far below the target volumes. Vessels berthed near to arrival, with an average time at anchorage of 1 hour and an average time at berth of 19 hours. The terminal reported equipment availability similar to the previous week, with an average of two out of three cranes and three out of five straddle carriers available throughout the week.

The AGL Terminal reported one vessel call for the week; the vessel berthed near arrival, spending only one hour at anchorage, with a time at berth of 36 hours (moving a total of just under 600 TEUs. Operations were supported by a full complement of crane availability throughout the week (two out of two cranes).

Figure 6 – Cape Town vessel view (per vessel group)



Source: Marine Traffic. Updated 02/08/2026 at 14:00.

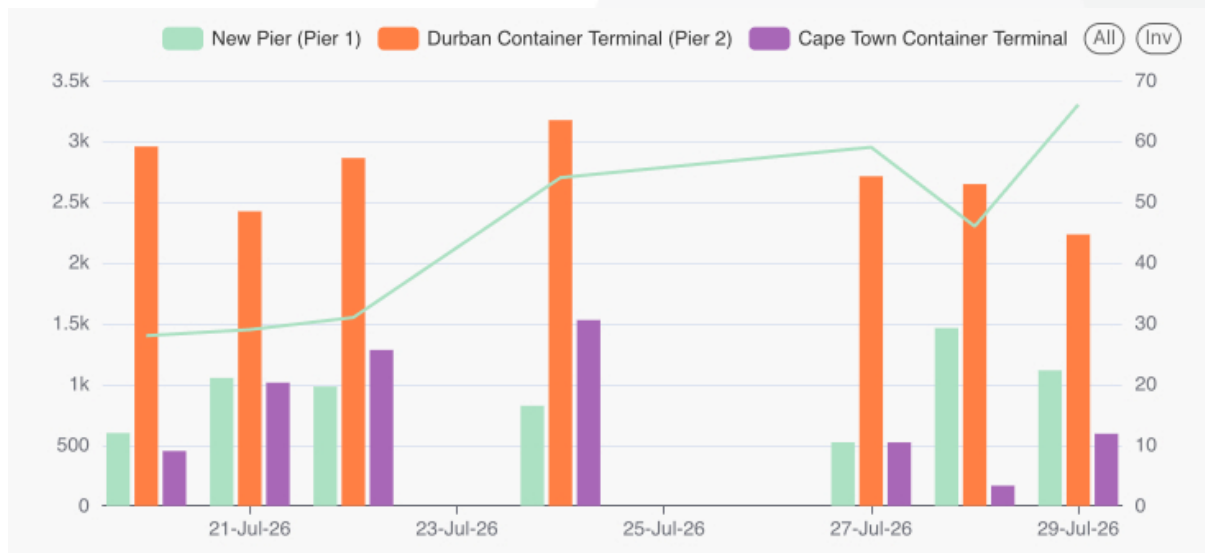
ii. Durban

Pier 1 reported a minor decrease in waterside volumes, though the total remained above the target for the week. Vessel turnaround time, in contrast, increased with a 20-hour increase in time at anchorage to 85 hours from the previous week's 65 hours, along with a minor increase in time at berth to 68 hours (up from 64 hours). The terminal reported an average of four out of seven cranes and 24 out of 25 RTGs available throughout the week. The increased RTG availability is a likely contributor to the continued strong performance on the waterside. The **TTT** for the week averaged **~59 minutes (↑37%, w/w)**, and the average **staging time** was **~42 minutes (↑56%)**.

Durban Gateway Terminal's estimated waterside volumes increased **↑16%** (**14%** below the target volume for the same period the previous year). In contrast to the increased waterside volumes, vessel turnaround times deteriorated significantly, showing further congestion. Vessels spent an estimated average of 166 hours at anchorage (up from 80 hours the previous week) and time at berth increased to 116 hours (up from 109 hours the previous week). The congestion was not isolated to waterside operations, with an upgrade to the Navis system causing significant delays to an already congested landside operation. Fortunately, Durban's *queue-to-berth* ratio, as reported the last two weeks, further dropped to **0.78** this week, which is, at least, encouraging.⁷

Durban Multi-Purpose Terminal reported a strong week in waterside operations, increasing by 44%, overreaching the target for the week. Vessels spent an average of 12 hours at anchorage, and 103 hours at berth. The terminal reported an average of two out of four cranes in operation throughout the week.

Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)

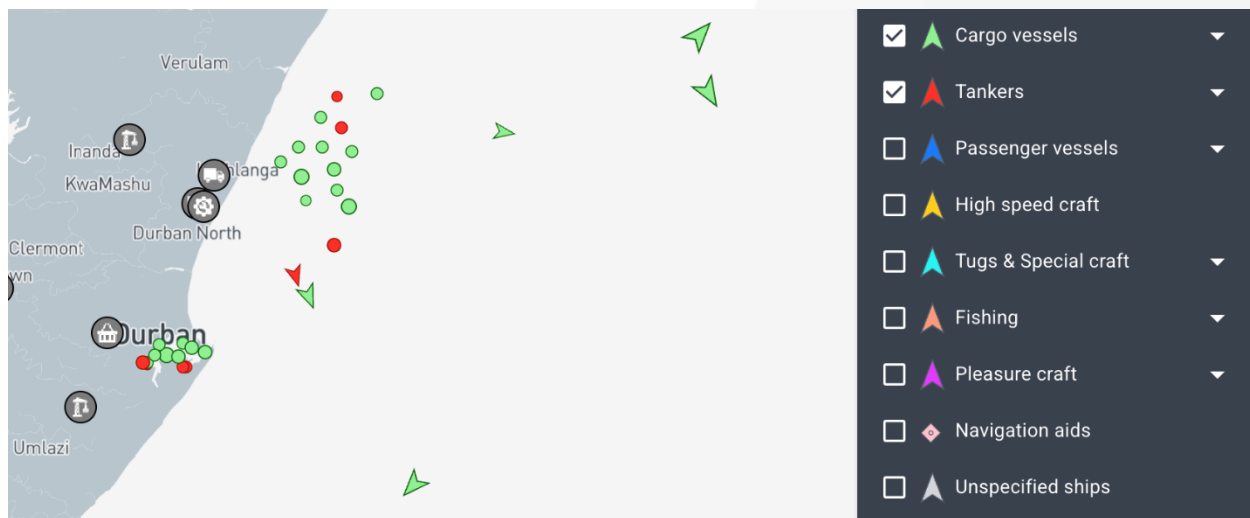


Source: Calculated using data from Transnet, 2026, and updated 02/08/2026.

The queue of container vessels waiting outside Durban **was again stable** this week. On Wednesday morning (5 August), **eight** container vessels were waiting outside at anchorage for Durban, **six** for DGT and two for Pier 1. The queue of dry (**six**), liquid (**four**), and breakbulk (**four**) vessels **was stable** from last week:

⁷ Linerlytica. 02/08/2026. [Port Congestion](#).

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 02/08/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal had a significant increase in waterside volumes, nearly reaching the terminal's target volumes, a positive turnaround from the previous week's decline. Vessel turnaround times increased slightly, with vessels spending an average of 33 hours at anchorage and 61 hours at berth. Equipment availability remained similar to the previous week, with an average of six out of eight cranes and 23 out of 30 RTGs in operation throughout the week.

Port Elizabeth Container Terminal reported a significant decline in volumes. However, actual volumes remained close to the target volume, as the terminal begins to stabilise after a particularly strong previous week. Vessels spent an average of 18 hours at anchorage, and 29 hours at berth. Equipment availability was above optimal capacity with an average of 13 straddle carriers operational against the required 11 machines.

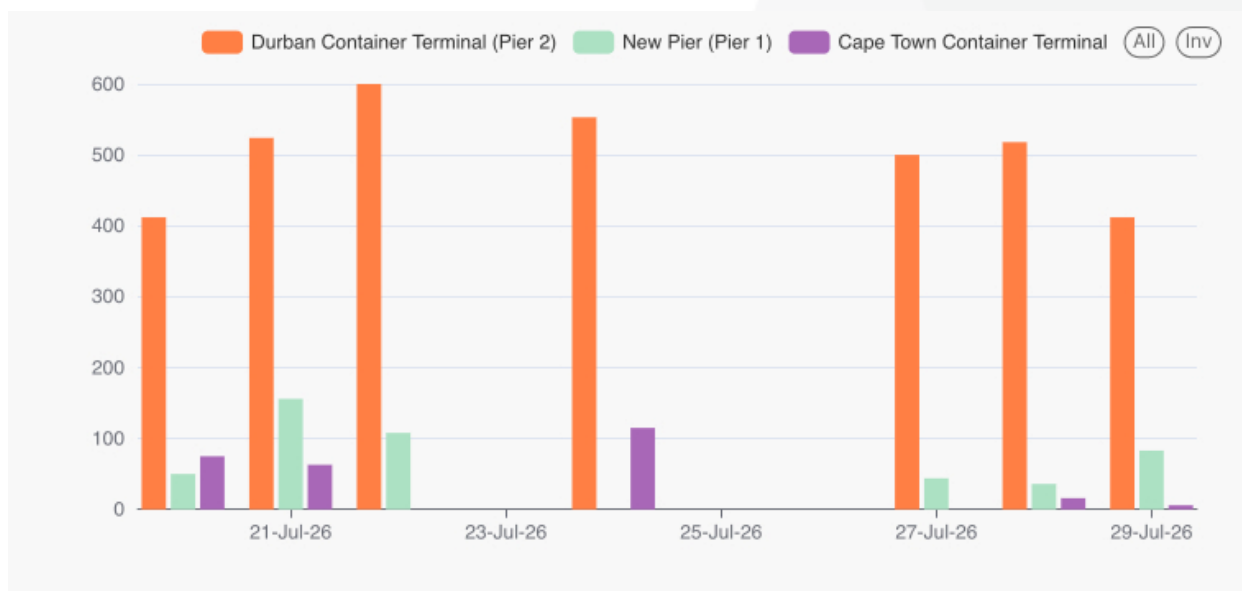
iv. Richards Bay

At RBCT, the daily average coal throughput for the week **decreased considerably** and averaged roughly **87,000 tons** (↓42%, w/w) a day.

v. Transnet Freight Rail (TFR)

In the last week (27 July to 2 August), rail cargo on the ConCor line out of Durban was reported at **2,648** containers, down by **↓17%** from the previous week's **3,182** containers.

Figure 9 – TFR: Rail handled (Pier 1, Pier 2, and CTCT)



Source: Calculated using data from Transnet, 2025. Updated 02/08/2026.

2. Air Cargo Update

a. International air cargo

As mentioned last week, the following table shows the inbound and outbound air cargo flows to and from ORTIA for last week (27 July to 2 August). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in July 2025 was ~848,687 kg.

Table 5 – International inbound and outbound cargo from OR Tambo

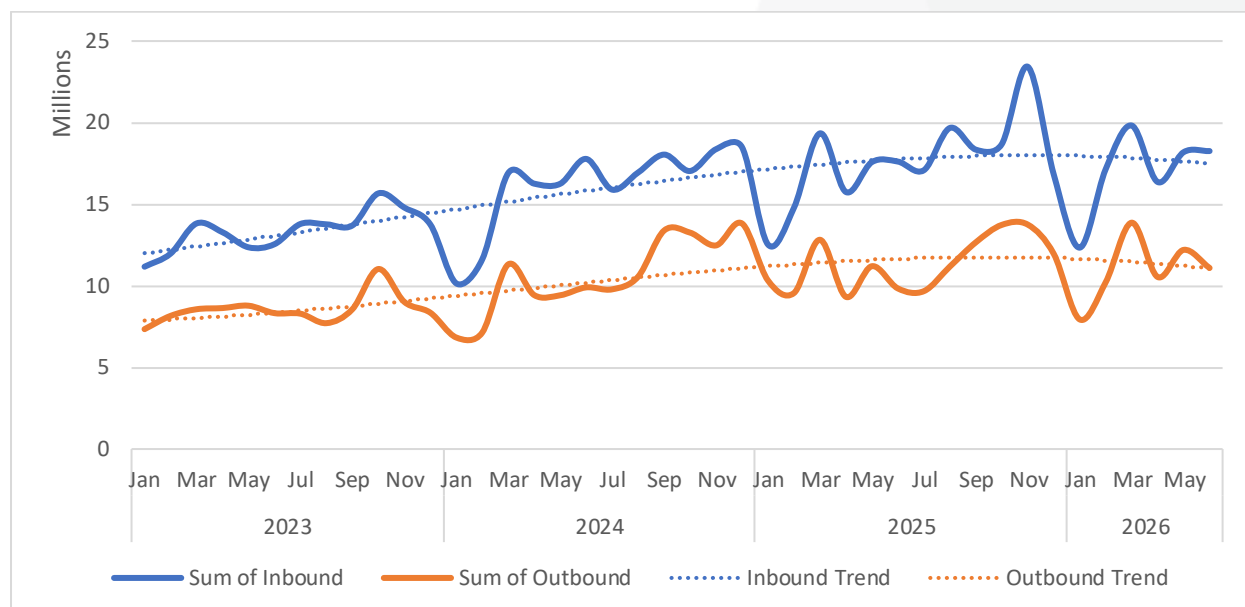
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	581,397	4,069,776	↓1%
Volume outbound	345,202	2,416,417	↓1%
Total	926,599	6,486,193	↓1%

Courtesy of ACOC. Updated: 02/08/2026.

International air cargo to ORTIA was relatively stable last week. The predicted daily average amounted to ~581,500 kg inbound (↓1%, w/w) and ~345,000 kg outbound (↓1%). Current predicted volumes to and from ORTIA remain significantly above the commensurate volumes of July last year (↑9%) and also above the pre-pandemic July of 2019 (↑9%). An update on the exact numbers for this week will be provided in next week's report.

The following figure shows the international air cargo flows to and from ORTIA since the start of 2023:

Figure 10 – International cargo: All terminals (kg millions)



Calculated from ACOC. Updated: 02/08/2026.

The latest reported fuel stock days (as of Thursday, 6 August) per airport indicate:

- ORTIA: **5 days** (target: 5 days)
- CTIA: **4.7 days** (target: 4 days)
- Durban: **10 days** (target: 5 days)

3. Road and Regional Update

a. Lebombo border post update

In the last week (27 July to 2 August), movements increased significantly – by around **118 trucks a day**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**).

- Truck volumes through the border post increased to **1,614 HGVs per day** (↑7%, w/w).
- Overall, queue times **were mostly stable** at an average of **~4.5 hours** (↓2%) at the border.
- The average processing times **were also stable** at an average of **~4.3 hours** (↓2%) per crossing.

The following table summarises the flows in the last seven days:

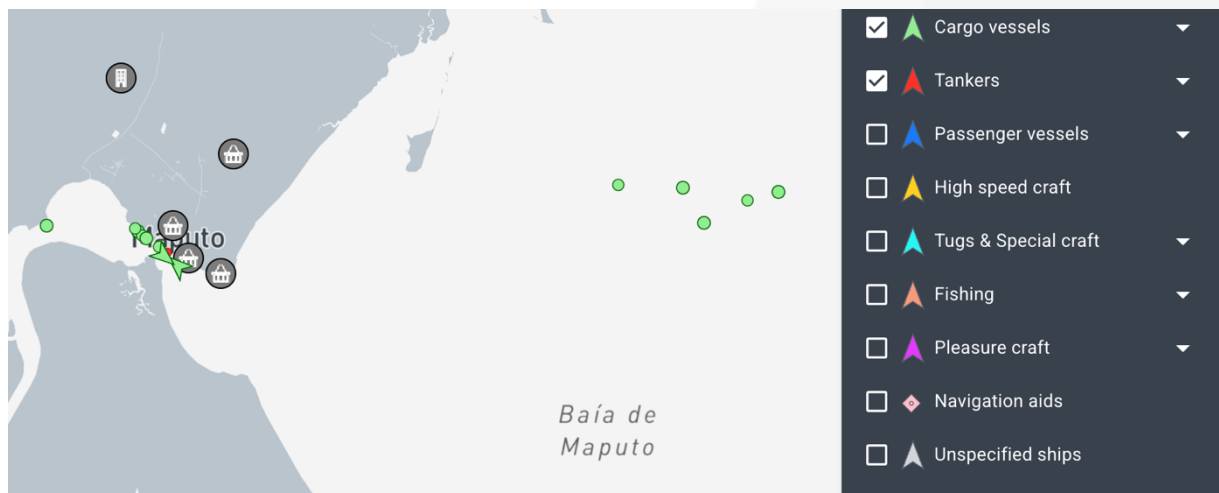
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,614	1,546	1,253	208	32	75	30	287
% (w/w)	7%	3%	9%	1%	-7%	-7%	-34%	3%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 02/08/2026.

The following shows a snapshot of the vessels waiting for the Port of Maputo:

Figure 11 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 02/08/2026 at 14:00.

b. SADC cross-border and road freight update

Notable trends this week in cross-border road freight within South Africa and the broader SADC region:

- Overall, the average queue time increased by around **an hour** from last week, as transit time increased by approximately the **same magnitude**.
- The median border crossing times at South African borders increased by **an hour and a half**, averaging **~10.8 hrs (↑16%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) also increased – by about **three-quarters of an hour**, averaging **~7.2 hrs (↑11%)**.

1. Beitbridge Border Post

- Persistent northbound congestion prompted SARS to introduce a queue-management system similar to the arrangement developed during the severe 2021 disruptions.
- Clearing agents are assisting authorities in identifying trucks that lack the required documentation or are not yet ready to proceed to the border.
- Traffic officials are redirecting non-compliant or unready vehicles to designated truck parks to prevent queues from extending into Musina.
- Industry requested temporary waivers for scanning and low-risk consignments, although no formal response had been received.

2. Qacha's Nek Border Post:

- The BMA temporarily suspended operations at Qacha's Nek between South Africa and Lesotho following heavy snowfall.
- Authorities agreed to the closure on both sides of the border.
- Travellers were advised to postpone their journeys or use Telle Bridge, approximately 190 km away, as an alternative crossing.

3. Mozambique vehicle-equipment requirements:

- Mozambique issued a compliance bulletin requiring commercial vehicles to carry prescribed safety and recovery equipment.
- Requirements include an accessible fire extinguisher, vehicle-specific spare tyres, two pre-warning cones, two warning triangles and suitable vehicle-lifting equipment.

- c. One transporter was reportedly fined MZN 9,000 for failing to carry all the required equipment.
- d. Transporters raised concerns that the additional equipment and spare tyres increase tare weight and consequently reduce available payload capacity.

4. Namibia axle-load and abnormal-load compliance:

- a. Namibia's Roads Authority reminded transporters, operators and logistics companies to comply with axle-load, gross vehicle mass and dimensional restrictions.
- b. The notice followed cases in which overloaded vehicles applied for abnormal-load permits only after arriving at their destinations.
- c. Permit applications must be submitted before departure and may require up to three working days for processing.
- d. Applications must be complete and accurate, as incomplete submissions will not be accepted.
- e. Operators must use all weighbridges located along the prescribed route, with bypassing weighbridges or breaching permit conditions subject to enforcement action.

The following table shows the changes in bidirectional flows through South African and SADC borders:

Table 7 – Delays⁸ summary – South African borders⁹ (both directions)

Border Post	Direction	HGV ¹⁰ Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	579	36.8	9.1	37.0	17,370	4,053
Beitbridge	Zimbabwe-SA	561	6.4	2.4	6.2	16,830	3,927
Groblersbrug	SA-Botswana	247	15.4	1.5	15.2	7,410	1,729
Martin's Drift	Botswana-SA	183	3.8	0.3	3.5	5,490	1,281
Kopfontein	SA-Botswana	202	10.4	2.4	10.2	6,060	1,414
Tlokweng	Botswana-SA	52	0.7	0.2	0.4	1,560	364
Vioolsdrift	SA-Namibia	30	4.0	1.3	4.0	900	210
Noordoewer	Namibia-SA	20	2.6	0.4	2.4	600	140
Nakop	SA-Namibia	30	3.8	0.4	3.5	900	210
Ariamsvlei	Namibia-SA	20	1.2	0.4	1.1	600	140
Skilpadshek	SA-Botswana	297	9.6	2.2	9.3	8,910	2,079
Pioneer Gate	Botswana-SA	79	1.8	1.3	1.5	2,370	553
Ramatlabama	SA-Botswana	167	3.0	1.0	2.6	5,010	1,169
Ramatlabama	Botswana-SA	111	0.7	0.1	0.4	3,330	777
Lebombo	SA-Mozambique	1,473	4.5	1.4	4.3	44,190	10,311
Ressano Garcia	Mozambique-SA	1,395	2.1	0.3	2.1	41,850	9,765
Sum/Average		5,446	6.7	1.5	6.5	163,380	38,122

Source: Calculated from [TransAfricaBorder](#) & Crickmay, week ending 26/07/2026.

⁸ Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.

⁹ Note: From this week onwards, bi-directional flows through the Ramatlabama border post between South Africa and Botswana has been added.

¹⁰ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

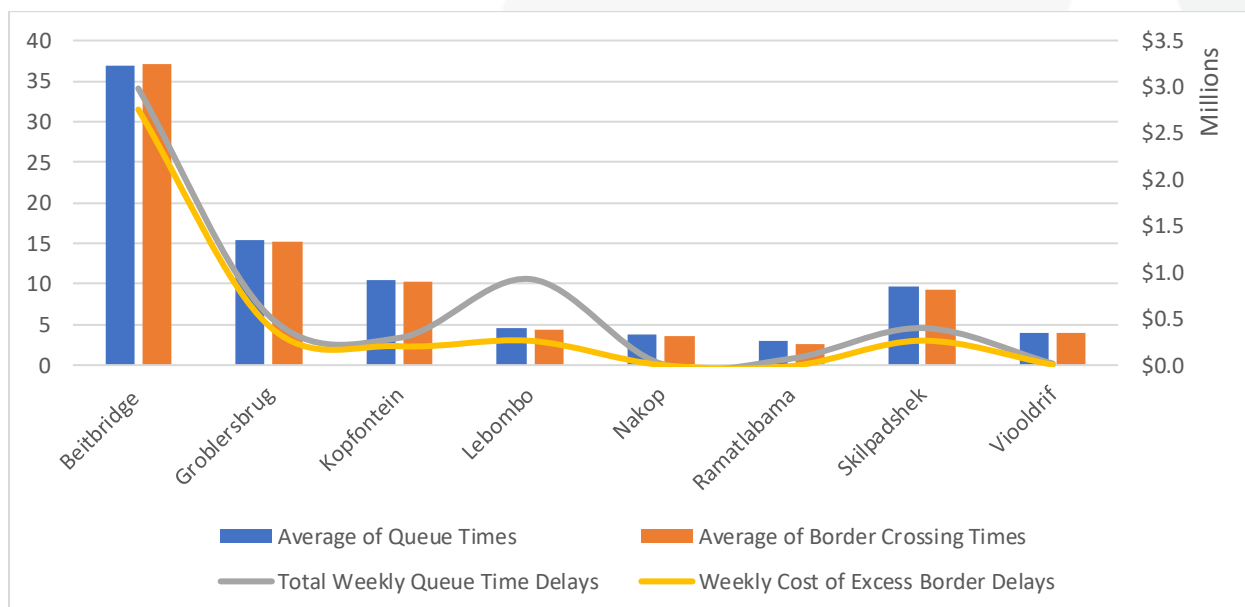
Table 8 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	7.4	1.8	7.0	9,600	2,240
Central Corridor	798	4.7	0.3	3.1	23,940	5,586
Dar Es Salaam Corridor	1,819	19.5	5.6	19.2	54,570	12,733
Maputo Corridor	2,868	3.3	0.8	3.2	86,040	20,076
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,695	17.0	4.0	17.3	110,850	25,865
Northern Corridor	2,817	1.8	0.2	1.3	92,520	21,588
WBNDL Corridor	938	3.9	1.0	3.6	28,140	6,566
Trans Cunene Corridor	100	2.9	0.6	2.7	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	16.8	1.7	16.7	3,480	812
Sum/Average	13,698	8.0	1.8	7.6	418,950	97,755

Source: Calculated from TransAfricaBorder & Crickmay, week ending 26/07/2026.

The following graph shows the weekly change in cross-border times and associated estimated costs:

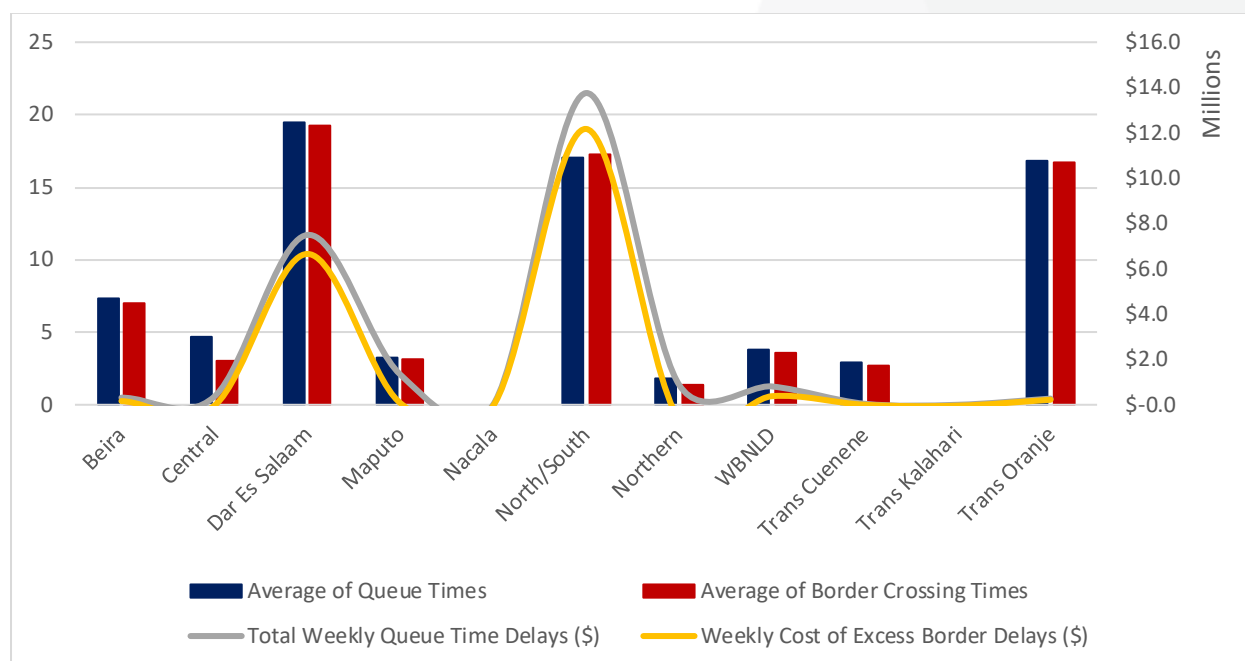
Figure 12 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 26/07/2026.

The following figure echoes those above, this time from a corridor perspective.

Figure 13 – Weekly cross-border delays & estimated cost from a corridor perspective (hours & \$ millions)



Source: Calculated from TransAfricaBorder & Crickmay, week ending 26/07/2026.

In summary, cross-border queue time averaged **~8 hours** (up by **~1.1 hours** from the previous week's **~6.9 hours**), indirectly costing the transport industry an estimated **\$25.3 million (R423 million)**. Furthermore, the week's average cross-border transit times hovered around **~7.6 hours** (up by **~0.9 hours** from the **~6.8 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$18.9 million (R316 million)**. The total indirect cost for the week amounts to an estimated **~\$44.2 million (R740 million)**, up by **↑16%** from the **~R635 million** in the previous report).

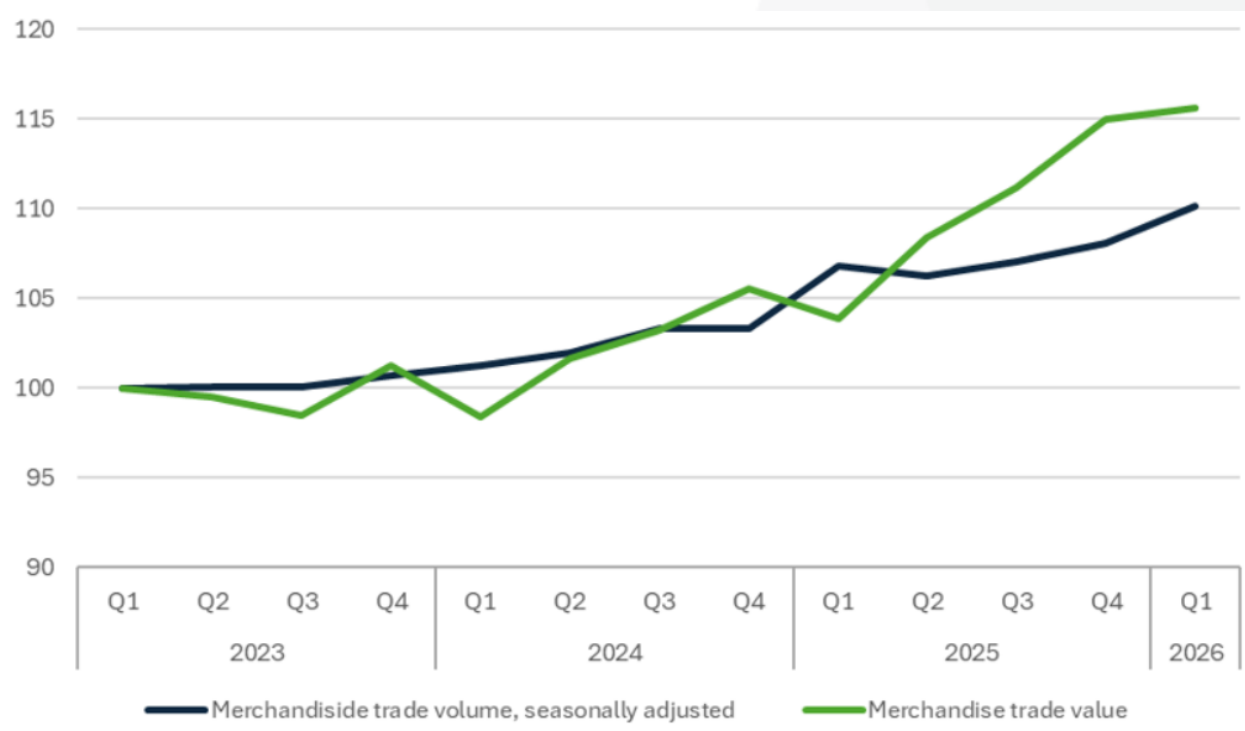
4. International Update

The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** global merchandise trade, **(b)** the global shipping industry, and **(c)** the global aviation industry.

a. Global merchandise trade

World merchandise trade remained resilient in the first quarter of 2026, with seasonally adjusted volumes rising by **↑1.9%** quarter-on-quarter and **↑3.2%** year-on-year. In value terms, trade increased by **↑2%** from the previous quarter and **↑11%** annually. Growth was driven largely by demand for AI-enabling goods, whose dollar value rose by more than **↑40%** (y/y), supporting particularly strong expansion in Asia.

Figure 14 – World merchandise trade volume and value, 2023Q1-2026Q1



Source: [WTO](http://www.wto.org)

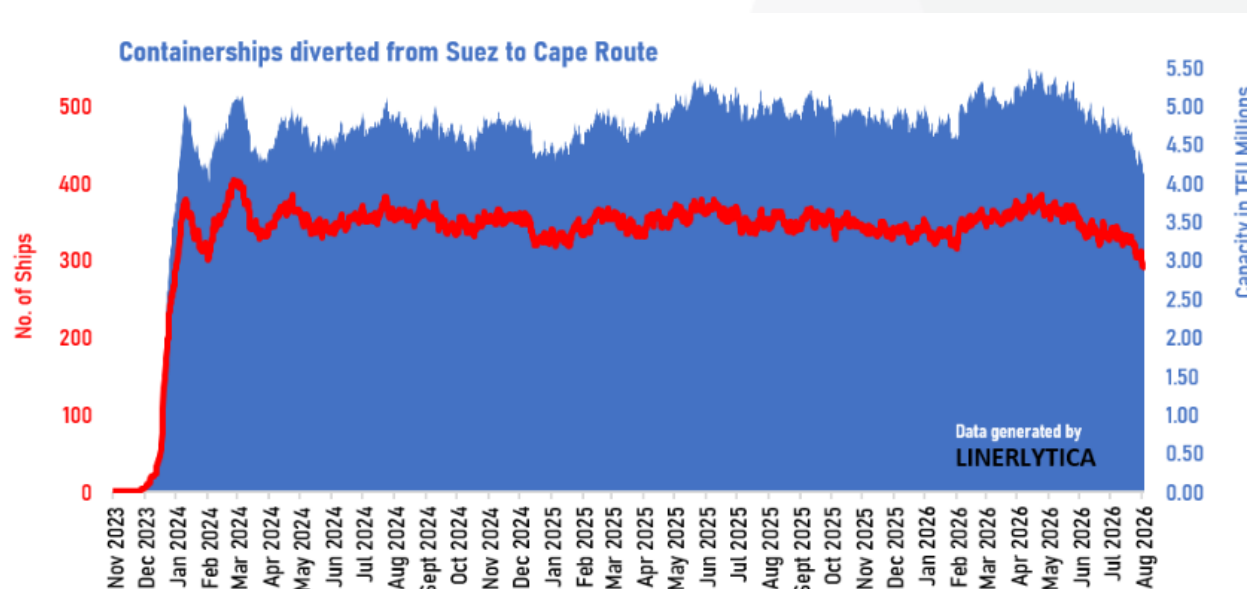
However, the Middle East conflict weakened regional trade, with export and import volumes falling by **↓9.7%** and **↓11.9%**, respectively. Africa's performance was mixed: export volumes declined by **↓2.5%** quarter-on-quarter, while merchandise export and import values rose by **↑14%** and **↑15%** (y/y). The WTO expects the full impact of Strait of Hormuz disruptions to become more visible in second-quarter data.

b. Global shipping industry

i. Global summary

Global liner shipping conditions remained marked by firmer spot rates, persistent Asian port congestion and sharply uneven operational reliability. *Linerlytica* reported that the SCFI rebounded by **↑4.7%** heading into August, as carriers implemented increases on the Transpacific, Latin American, Indian-subcontinent and Middle Eastern trades, despite continued weakness on Asia–Europe. Strong Asian export demand, congestion and equipment shortages have tightened effective capacity. Its accompanying figure shows that Suez diversions have continued to unwind **fewer than 300 containerships**, representing approximately **4.1 million TEUs** or **5.2% of the global fleet**, remaining routed via the Cape, down from a peak of **5.3 million TEUs** earlier in 2026, as CMA CGM and Maersk increased selected Red Sea–Suez transits.

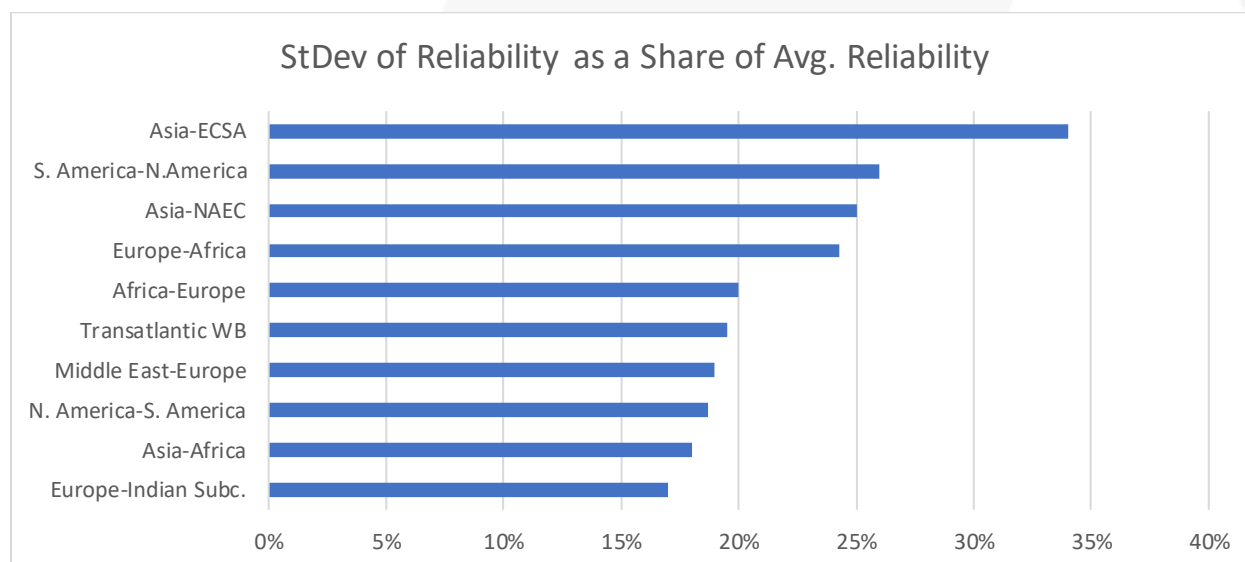
Figure 15 – Containership diverted from Suez to Cape Route



Source: [Linerlytica](https://www.linerlytica.com)

However, *Sea-Intelligence's* figure demonstrates that network predictability remains deeply uneven. The Asia–East Coast South America trade recorded volatility exceeding 33% of average reliability, while South America–North America and Asia–North America East Coast exceeded 25%. Europe–Africa, Africa–Europe and Middle East–Europe also ranked among the ten most volatile trades; nine of these ten corridors were newcomers relative to 2018–2019, indicating a structural redistribution of operational risk.

Figure 16 – Standard Deviation of reliability as a share of average reliability



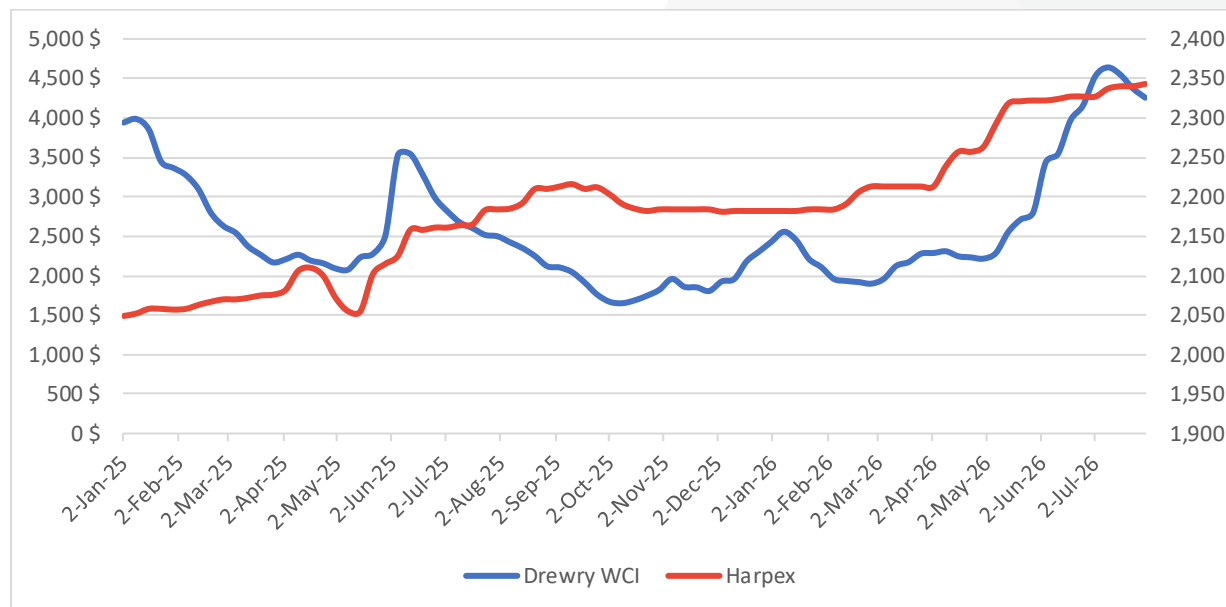
Source: Adjusted from [Sea Intelligence](https://www.sea-intelligence.com)

Geopolitical exposure remains acute. *Kpler* recorded only two Strait of Hormuz transits and one Bab el-Mandeb transit on 5 August, sharply below the previous day, while *Linerlytica* also reported the first containership casualty of the Russia–Ukraine conflict.

ii. Container freight rates

Drewry's *World Container Index* (WCI) are up by **↑1%** to **\$4,297 per 40-foot container**. The small increase comes after some weeks of rates decline; however, the general expectations are for rates to subside around **\$3,500** by the end of the year. Drewry notes some caution, and states: *"Ongoing uncertainty surrounding global trade policies, geopolitical developments, and port congestion is expected to influence market conditions and freight rate trends in the coming weeks."*

Figure 17 – Drewry WCI (\$/40ft) & Harper Petersen Index



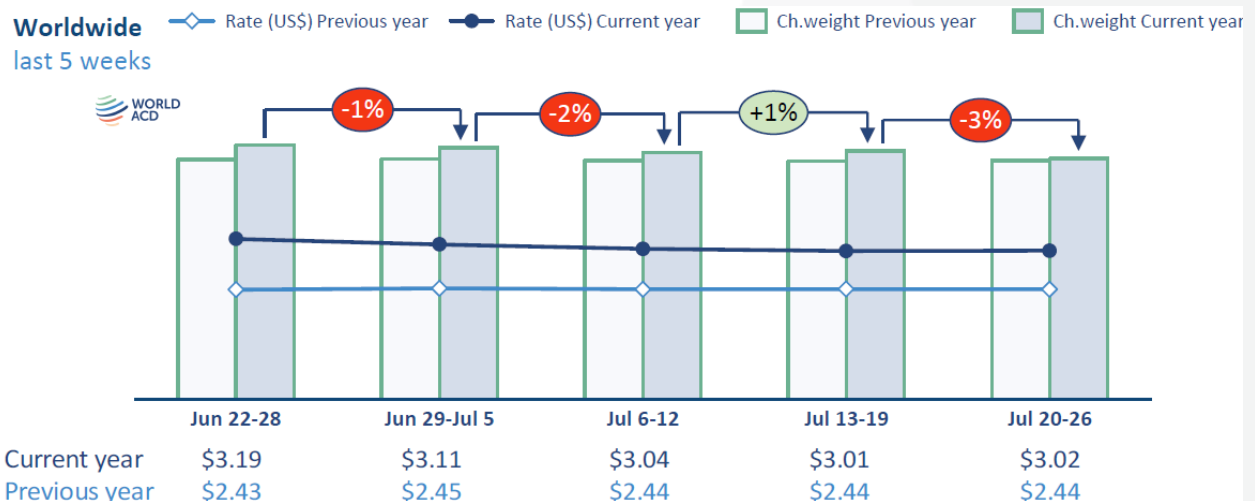
Source: Calculated from [Drewry](#) & [Harper](#)

Charter rates remain stable but elevated, with the Harper Petersen index currently at **2,343 points**.

c. Global air cargo industry

The latest weekly data from WorldACD indicates that global air cargo demand softened in week 30 (20–26 July), with worldwide chargeable weight declining by **↓3%** week on week and by **↓2%** when comparing the latest fortnight with the preceding two weeks. The contraction was broad-based, led by Africa (**↓7%**, w/w) and Asia Pacific (**↓5%**), while Europe and the Middle East and South Asia each declined by **↓2%**. Africa's weakness was concentrated on Europe-bound traffic, whereas Asia Pacific volumes were affected by lower intra-regional demand, typhoon-related disruption in Hong Kong and weaker mainland China exports.

Figure 18 – Chargeable weight and rates (past five weeks)



Source: WorldACD

Worldwide capacity decreased by a more moderate ↓1%, including a ↓7% reduction to and from the Gulf, widening the capacity deficit relative to pre-conflict levels. After four consecutive weekly declines, the global average rate stabilised at **\$3.02 per kilogram**, supported largely by rising jet-fuel costs and associated fuel surcharges.

ENDS¹¹

¹¹**ACKNOWLEDGEMENT:** This initiative – **The Cargo Movement Update** – was developed collectively by the Private Sector at large to provide visibility of the movement of goods during the COVID-19 pandemic. The report is authored by the Southern African Association of Freight Forwarders (SAAFF) and distributed by Business Unity South Africa (BUSA). SAAFF acknowledges the input of several key business partners and associations in compiling these reports, which have become a weekly industry staple.