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Cargo Movement Update #294[1]

Date: 9 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)	48,464	55,214	**103,678**	37,098	47,700	**84,798**	↑22%
Air Cargo (tons)	4,237	2,530	**6,767**	4,070	2,416	**6,486**	↑14%

Monthly Snapshot

Figure 1 – Cyclical[4] monthly cargo volume, year on year (most metrics: June '25 vs June '26, % growth)

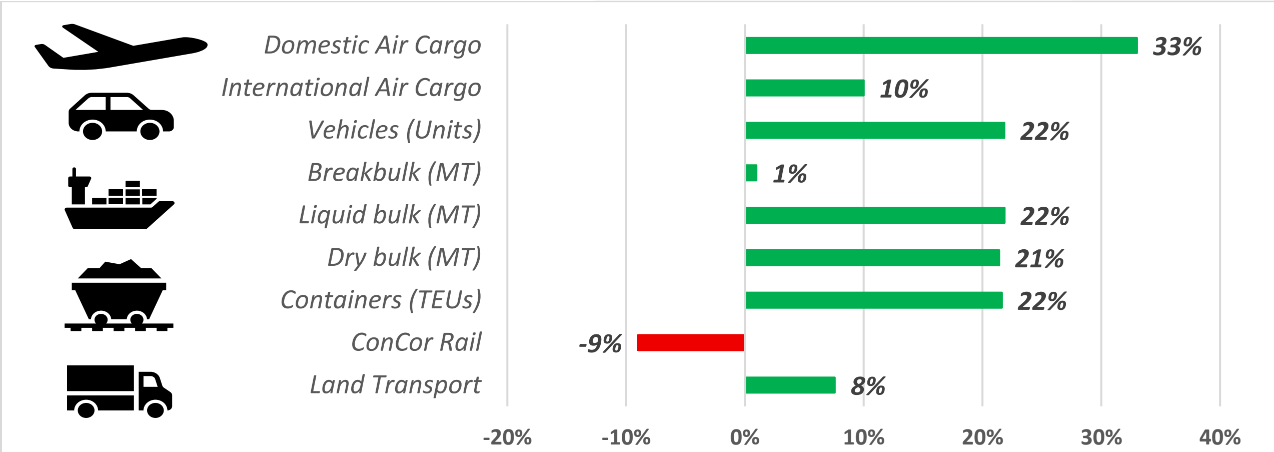
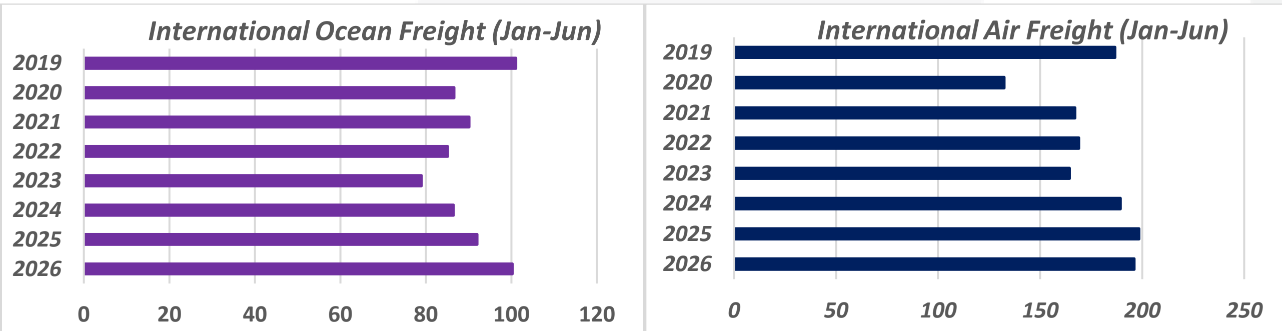


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **14,811 TEUs** was handled per day, with **12,943 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3,232** containers, down by ↑22% from last week.
- Cross-border queue: **↓1.4 hrs**; transit: **↓1.2 hrs**; SA borders: **~7.7 hrs** (**↓28%**); SADC: **~6.3 hrs** (**↓13%**).
- Global TEUs in June: down by **↓1.7%** (m/m), but up by **↑5.5%** (y/y). Prices (dry & reefer): **↑14%** (m/m).
- **North Asian port congestion surged**, stranding >**2.4 million TEU** after *Typhoon Dolphin*. Durban improves.
- Global air cargo rates are subsiding (**↓8%**, m/m) as tonnage remains up monthly (**↑2%**) and annually (**↑5%**).

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[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *294th* 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 **14,811 TEUs** was handled daily, an increase from **12,114 TEUs** the previous week.

Port operations showed an increase in waterside operations across most terminals. The Western Cape terminals (both CTCT and CTMPT) reported a significant increase in waterside volumes exceeding their targets for the week, in spite of weather delays. In the KwaZulu-Natal region, New Pier showed an increase in waterside volumes, while Durban MPT showed a slight decrease, though both terminals outperformed their target volumes. DGT reported a significant number of vessels waiting at anchorage throughout the week, though the number started declining as the week progressed. In the Eastern Cape, both NCT and PECT reported strong volumes.

Transnet Port Terminals advises that, following the 5 August 2026 coastal diesel price of R25,30 (which stays within the R23,50 - R27,00 threshold band), the Fuel Neutrality Charge remains unchanged at R52,00 per container, applying to all containers handled on vessels berthing from 1 September 2026. The charge is a short-term measure tied to South Africa's regulated fuel pricing framework, reassessed on the 7th of each month, with customers notified only when a threshold shift changes the fee.

Durban Gateway Terminal will cut over to the NAVIS N4 Terminal Operating System from 15 August 2026 at 18:00, with an approximately 12-hour migration during which no vessel or landside operations will run, and no trucks will be planned or appointed, followed by a phased ramp-up where customers should expect some initial delays. Critically, existing Transnet NAVIS users will not be migrated automatically, so all organisations must submit new registration forms to N4Accounts@dgt.ictsi.com before go-live, review the training material on www.dgt.ictsi.com, register for ICTSI RADAR, and use the 24/7 Hypercare support desk running until 31 August 2026.

Global container shipping remained resilient in June, with **17.1 million TEUs** handled globally, down **↓1.7% (m/m) but still ↑5.5%** (y/y), while the CTS global price index increased by **↑14%** (m/m). Regional performance was mixed: **SSA exports** rose **↑4.1%** (m/m) and **↑3.7%** (y/y), while imports fell **↓1.6%** (m/m) but remained **↑13.3%** (y/y). North Asian congestion intensified sharply, with more than **2.4 million TEU** of containership capacity stranded following *Typhoon Dolphin*, particularly around Ningbo and Shanghai. Middle Eastern disruption also persisted, with only **two outbound containership passages** through the Strait of Hormuz last week. Conversely, CMA CGM and Maersk returned **three additional services** to the Suez route via Bab el-Mandeb, partly to alleviate vessel and equipment shortages.

Last week's international air cargo to and from ORTIA amounted to **~536,500 kg** inbound and **~310,000 kg** outbound – slightly below (**↓9%**) predicted and reported on in last week's *Cargo Movement Update* (2 August). This week, international air cargo to ORTIA increased substantially. The daily average amounted to **~605,000 kg** inbound (**↑13%**, w/w) and **~361,500 kg** outbound (**↑17%**). Current volumes to and from ORTIA remain slightly above the commensurate volumes of August last year (**↑3%**) – but slightly below the pre-pandemic August of 2019 (**↓2%**).

Concerning consolidated monthly stats, international air cargo volumes remained resilient in July, increasing marginally by **↑0.4% (m/m)** and strongly by **↑9% (y/y)**. Durban recorded the sharpest monthly increase at **↑25%**, followed by Cape Town at **↑8%**, while Johannesburg declined by **↓2% (m/m)**; importantly, all three terminals remained well above July 2025 levels.

Domestic air cargo volumes strengthened in July, increasing by **↑2%** (m/m) and **↑3%** (y/y) across the three main terminals. Johannesburg and Durban recorded solid monthly gains of **↑10%** and **↑9%**, respectively, while Cape Town declined by **↓13%** (m/m); nevertheless, all three terminals remained above July 2025 levels, led by Cape Town at **↑8%** (y/y).

Global air cargo demand remained positive in July, with worldwide tonnages increasing by **↑2%** (m/m) and **↑5%** (y/y), despite a marked slowdown in China and Hong Kong traffic to Europe. Rates continued to ease from recent highs, but remained substantially elevated year-on-year, with global spot rates averaging **$3.41/kg** in July (**↓8%** m/m**;** **↑29%** y/y) and the latest two-week data showing worldwide rates still **↑22%** (y/y).

On the N4 corridor, movements decreased significantly – by around **126 trucks a day**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**). Truck volumes through the border post decreased to **1,488 HGVs per day** (**↓9%**, w/w). Overall, queue times **were mostly stable** at an average of **~4.5 hours** at the border. The average processing times **were also stable** at an average of **~4.3 hours** per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time decreased by around **an hour and a half** from last week, as transit time also decreased – by approximately **an hour and a quarter**. The median border crossing times at South African borders decreased by more **than three hours**, averaging **~7.7 hrs** (**↓28%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) also decreased – by about **three-quarters of an hour**, averaging **~6.3 hrs** (**↓13%**). This week, despite widespread decreases, on average, **four** SADC borders again took a day or more to cross, namely Beitbridge, Chirundu, Kasumbalesa (the worst affected, taking around **three days** to cross from the **Zambian side**), and Katima Mulilo.

Other regional road and cross-border developments included **(1)** intensified enforcement of Mozambique's revised vehicle safety-equipment requirements, alongside industry concerns over fines and unclear truck-access restrictions, **(2)** a temporary disruption to Zambia Revenue Authority's ASYCUDA customs system, which was restored later the same day, and **(3)** new Kasumbalesa protocols requiring northbound commercial vehicles to pass through the border weighbridge and obtain a measurement slip before proceeding to the Whisky customs clearance yard.

In closing, despite persistent geopolitical disruption, congestion and operational uncertainty, global container trade continues to outperform the prevailing narrative, with June throughput remaining **↑5.5%** (y/y) at **17.1 million TEUs**. Encouragingly, this resilience extends to Sub-Saharan Africa, where exports increased by **↑4.1%** (m/m) and **↑3.7%** (y/y), while imports remain **↑13.3%** (y/y). South Africa remains central to these flows, accounting for approximately **61% of SSA containerised exports and 24% of imports**. The underlying trade environment therefore remains comparatively supportive for South Africa. The challenge is increasingly one of execution: ensuring that ports, rail and associated logistics systems can reliably accommodate growing regional cargo demand and translate favourable trade conditions into sustained competitiveness.

Contents

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 3 to 9 August (measured in TEUs)

7-day flow reported (03/08/2026 – 09/08/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Old Pier 2)	4,975	34,824	↑8%
New Pier (Pier 1)	2,317	16,217	↑8%
Cape Town Container Terminal	2,289	16,025	↑40%
Ngqura Container Terminal	2,974	20,818	↑35%
Port Elizabeth Container Terminal	821	5,747	↑118%
Other	1,435	10,047	↑25%
Total	**14,811**	**103,678**	**↑22%**

Source: Calculated from TPT, 2026. Updated 09/08/2026.

An average of **~14,811 TEUs** (**↑22%**) was handled per day for the last week (*3 to 9 August, Table 2*). Consequently, throughput was above the projected average of **~12,943 TEUs** (**↑14%** actual versus projected). For the coming week, a decreased average of **~12,943 TEUs** (**↓13%**) is predicted to be handled (*10 to 16 August*, *Table 3*).

Table 3 – Container Ports – Weekly flow projected for 10 to 16 August (measured in TEUs)

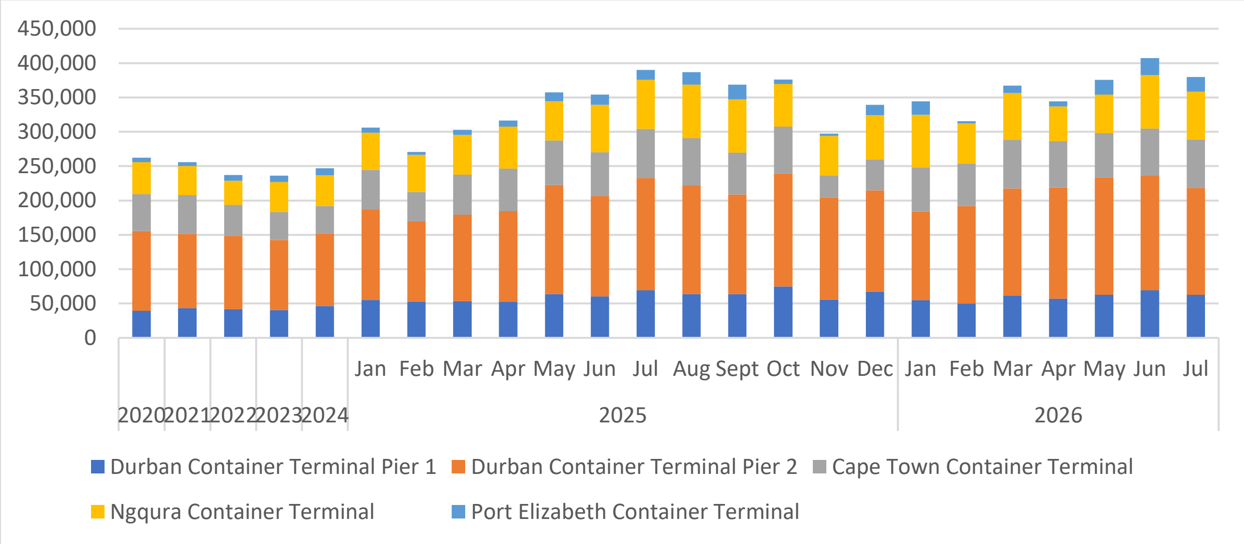
7-day flow projected (10/08/2026 – 16/08/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Old Pier 2)[6]	5,351	37,459	↑8%
New Pier (Pier 1)	2,105	14,737	↓9%
Cape Town Container Terminal	1,902	13,312	↓17%
Ngqura Container Terminal	2,264	15,848	↓24%
Port Elizabeth Container Terminal	425	2,976	↓48%
Other	896	6,270	↓38%
Total	**12,943**	**90,602**	**↓13%**

Source: Calculated from TPT, 2026. Updated 09/08/2026.

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 09/08/2026.

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:

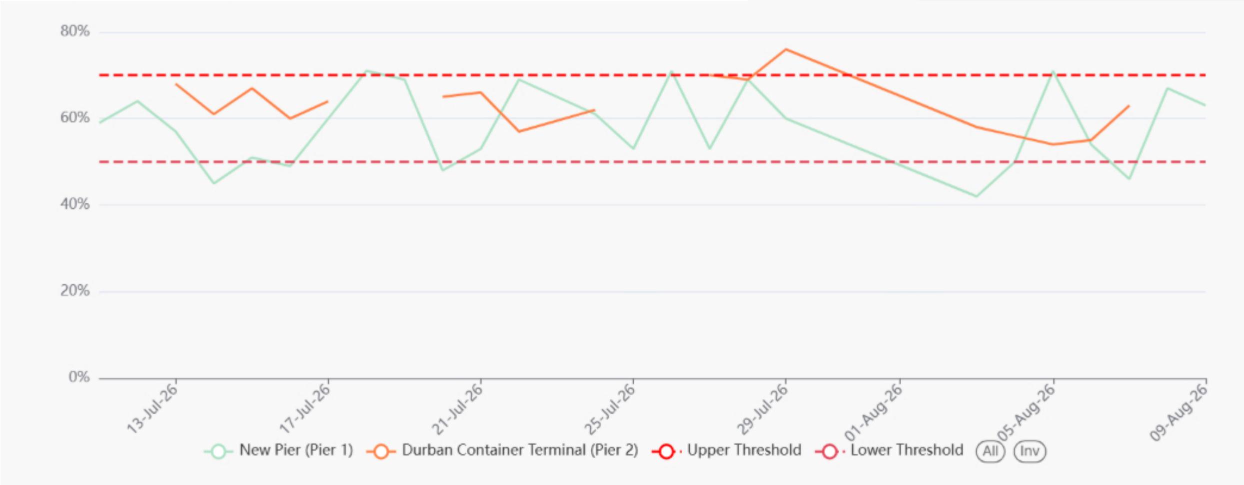
Table 4 – Vessel Dwell Time

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	2.4
Ngqura	NCT	2.4	2.6
Port Elizabeth	PECT	4.4	1.3

Source: Calculated from Marine Traffic AIS data, 2026. Updated 12/08/2026.

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

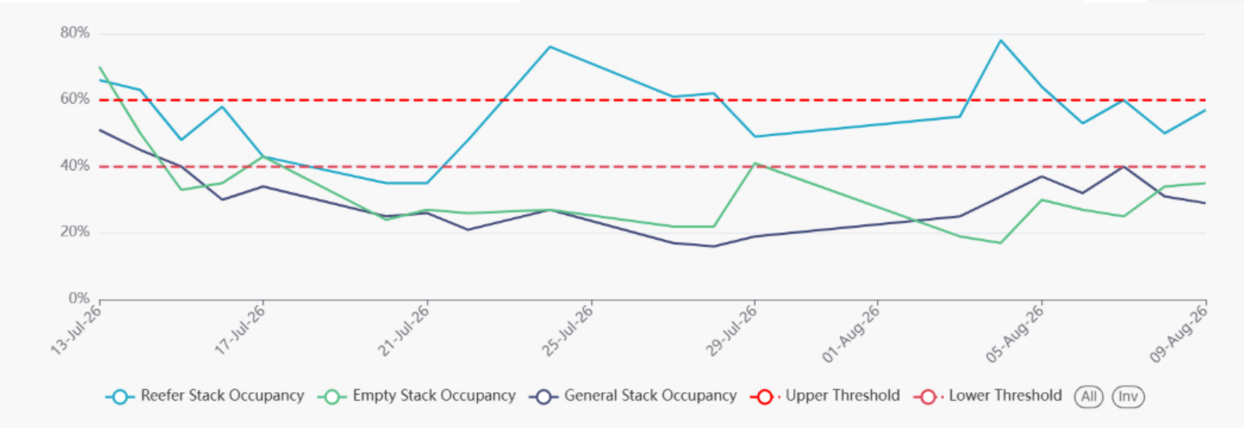
Figure 4 – Stack occupancy in Durban, general-purpose containers (10 July to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 09/08/2026.

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 (10 July to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 09/08/2026.

b. Summary of port operations

i. General updates

Transnet Port Terminals has advised that the Fuel Neutrality Charge remains in effect following the fuel price increase effective 5 August 2026. With the coastal diesel (0.05%/500ppm) price at R25.30 per litre, the applicable threshold band is unchanged, and the charge will remain at R52.00 per container for all containers handled on vessels berthing from 1 September 2026. TPT reassesses the index on the 7th of each month and will notify customers in the following week only where a threshold has been crossed and the per-container fee changes. The charge remains characterised as short-term and linked to periods of extreme fuel price variation.

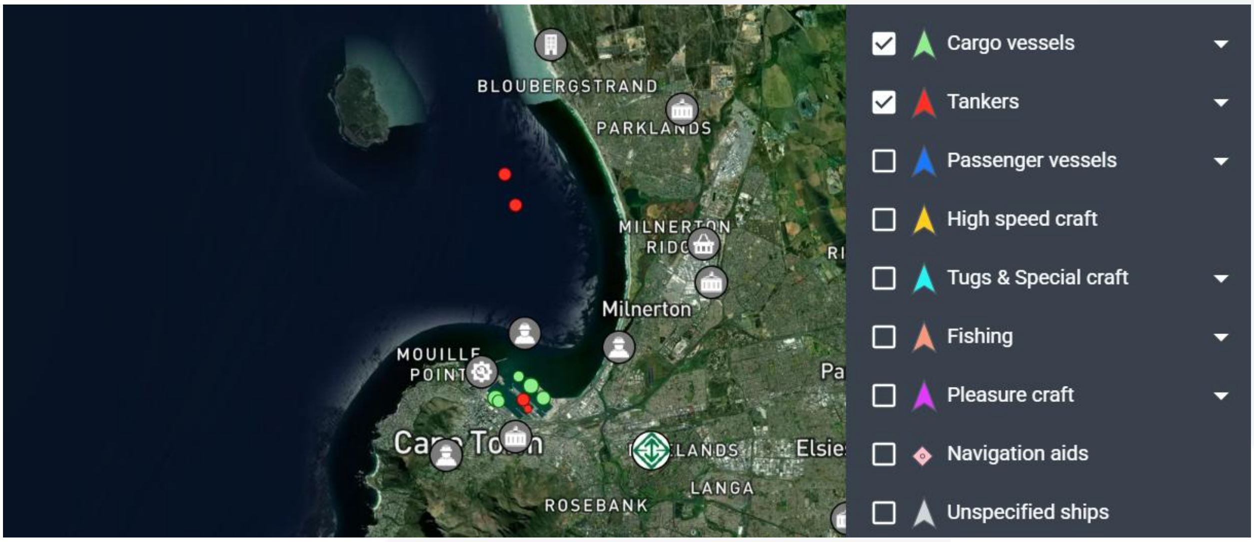
ii. Cape Town

Cape Town Container Terminal reported a notable improvement in waterside volumes, approximately 20% above the target volumes, recovering from the previous week’s decline. The increase in volumes was paired with a strong vessel turnaround time, with vessels mostly berthed within an hour of arrival and spending 38 hours at berth. The strong performance was supported by strong equipment availability with a weekly average of nine out of nine cranes and 29 out of 32 RTGs. The strong performance was despite some weather delays towards the end of the week, and a slower start to the week.

Cape Town Multi-Purpose Terminal reported a significant increase in waterside volumes, with vessels spending an average of 7 hours at anchorage and 32 hours at berth. Equipment availability remained consistent with previous weeks, reporting an average availability of two out of three cranes and three out of five straddle carriers.

The AGL Terminal reported one vessel call for the week, handling 384 containers. The vessel was transferred from the MPT, spent less than a day working, and is now on lay-by per the request of the shipping line (planned sailing for 11 August). The terminal reported a full complement of two out of two cranes in operation.

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



Source: Marine Traffic. Updated 09/08/2026 at 14:00.

iii. Durban

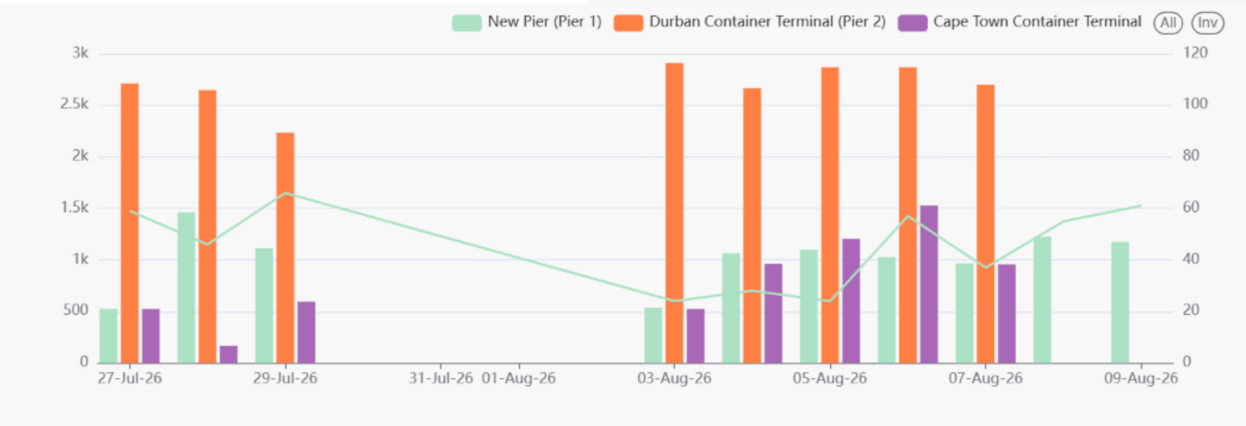
Pier 1 reported a stable week, with a minor increase in waterside volumes, 10% higher than the targeted volumes. Vessel turnaround times eased, with vessels spending an average of 50 hours at anchorage (down from 85 hours) and 57 hours at berth (down from 68 hours), with an average of one vessel waiting at anchorage throughout the week. Crane availability was reported as four out of seven cranes. In contrast, RTG availability was relatively strong at 28 units against an optimal complement of 25, indicating the terminal ran above optimal equipment capacity. The **TTT** for the week averaged **~40 minutes** (**↓32%**, w/w), and the average **staging time** was **~31 minutes** (**↓26%**).

Durban Gateway Terminal reported a modest increase of 8% in waterside volumes. Vessel turnaround times remained elevated, with vessels waiting an average of 131 hours at anchorage and 68 hours at berth (though both down from the previous week). Congestion appears to be easing, with the average number of vessels at anchorage reported per day declining towards the end of the week.

Durban Gateway Terminal has confirmed that cutover to the NAVIS N4 terminal operating system will commence on 15 August 2026 at 18:00, with the migration expected to take approximately 12 hours. Port users are reminded that existing users of the current Transnet NAVIS environment will not be migrated automatically. All organisations requiring access must submit the new registration forms to N4Accounts@dgt.ictsi.com ahead of go-live to avoid delays in system access. Training material, user guides and registration forms remain available on the DGT website under Terminal Updates > NAVIS Communications (https://dgt.ictsi.com/terminalupdates), and a Hypercare support team will be in place until 31 August 2026. Customers are also encouraged to register for the ICTSI RADAR visibility platform, which becomes available after go-live.

Durban Multi-Purpose Terminal saw a minor decrease in waterside volumes, though, following strong performance the previous week, with volumes exceeding the target by over 200%, indicating a very strong week. Vessel turnaround times were quite high, with an average of 131 hours at anchorage and 71 hours at berth. Equipment availability for the week was reported at two out of four cranes.

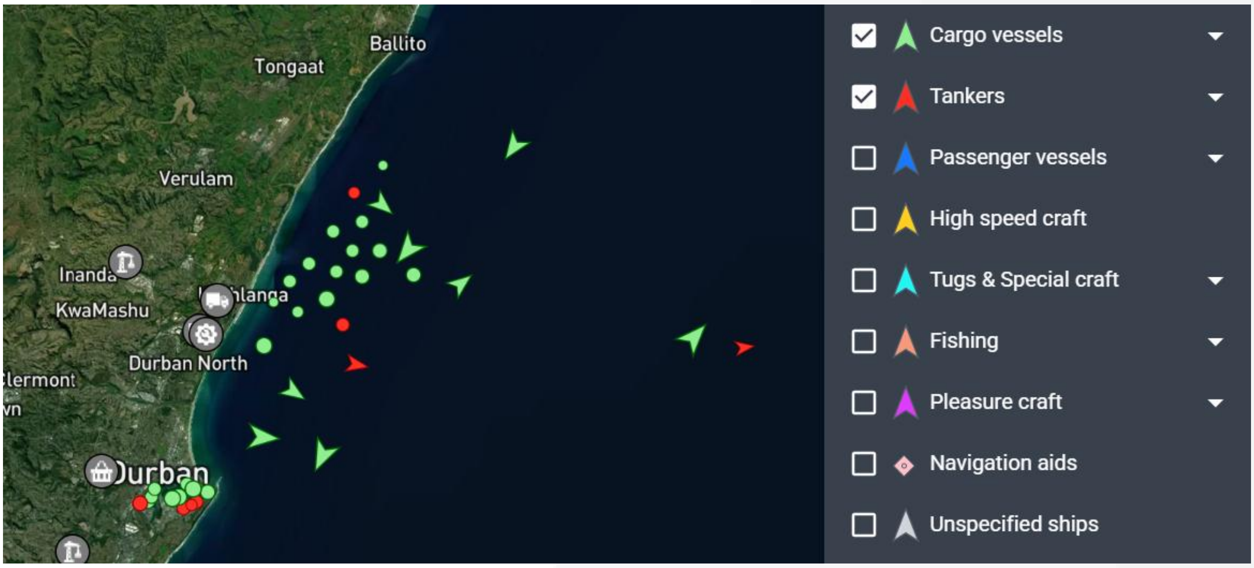
Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 09/08/2026.

The queue of container vessels waiting outside Durban **was again stable** this week. On Wednesday morning (12 August), **nine** container vessels were waiting outside at anchorage for Durban, **four** for DGT, **four** for Pier 1, and **one** for Point. The queue of dry (**six**), liquid (**four**), and breakbulk (**one**) vessels **was stable** from last week:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 09/08/2026 at 14:00.

iv. Eastern Cape

Ngqura Container Terminal reported a strong week, with waterside volumes increasing significantly, setting the actual volume above the target volume by 31%. This is paired with a decreased vessel turnaround time, with vessels spending an average of 18 hours at anchorage and 55 hours at berth (down from 33 and 61 hours respectively). Equipment availability remained consistent with an average of seven out of eight cranes and 23 out of 30 RTGs in operation.

Port Elizabeth Container Terminal reported an increase in waterside volumes, moving significantly more containers than anticipated. Vessels spent an average of 33 hours at anchorage and 24 hours at berth. Crane availability held at two out of three, with 14 straddle carriers available against an optimal complement of 11, placing the terminal above optimal equipment capacity.

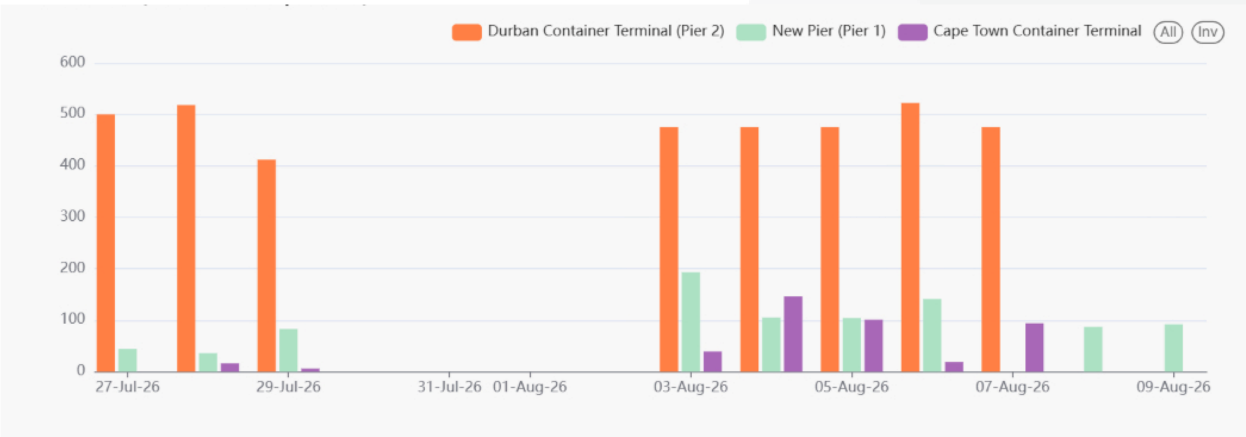
v. Richards Bay

At RBCT, the daily average coal throughput for the week **increased considerably** and averaged approximately **157,000 tons** (**↑80%**, w/w) a day. With an average of 24 trains per day being serviced, above the target of 22.

vi. Transnet Freight Rail (TFR)

In the last week (*3 to 9 August*), rail cargo on the ConCor line out of Durban was reported at **3,232** containers, down by ↑22% from the previous week's **2,648** containers.

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



Source: Calculated using data from Transnet, 2025. Updated 09/08/2026.

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 (*3 to 9 August*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *August 2025* was **~935,374 kg**.

Table 5 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**605,283**	**4,236,984**	**↑13%**
Volume outbound	**361,387**	**2,529,708**	**↑17%**
Total	**966,670**	**6,766,692**	**↑14%**

Courtesy of ACOC. Updated: 09/08/2026.

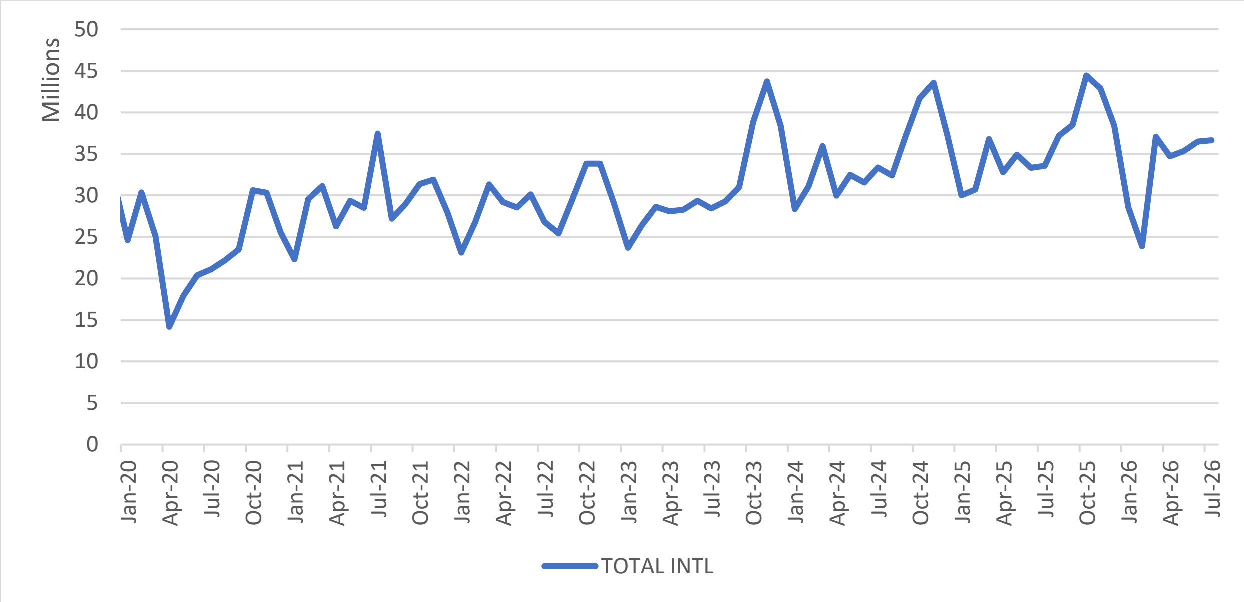
Last week's international air cargo to and from ORTIA amounted to **~536,500 kg** inbound and **~310,000 kg** outbound – slightly below (**↓9%**) predicted and reported on in last week's *Cargo Movement Update* (2 August). This week, international air cargo to ORTIA increased substantially. The daily average amounted to **~605,000 kg** inbound (**↑13%**, w/w) and **~361,500 kg** outbound (**↑17%**). Current volumes to and from ORTIA remain slightly above the commensurate volumes of August last year (**↑3%**) – but slightly below the pre-pandemic August of 2019 (**↓2%**).

For the full month of July, a slight increase was again witnessed across the board – except for ORTIA:

- Johannesburg decreased by **↓2%** (m/m) versus June – but is up by **↑10%** (y/y) versus 2025.
- Cape Town increased by **↑8%** (m/m) and by **↑6%** (y/y) versus 2025.
- Durban increased by **↑25%** (m/m) and by **↑17%** (y/y).
- Consequently, total international air cargo for July 2026 is up by **↑0.4%** (m/m) and up by **↑9%** versus 2025.

The following figure shows the international air cargo flows to and from all terminals since the start of 2020:

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



Calculated from ACOC. Updated: 10/08/2026.

The latest reported fuel stock days (as of Wednesday afternoon, 13 August) per airport indicate:

- ORTIA: **6.5 days** (target: 5 days)
- CTIA: **4.1 days** (target: 4 days)
- Durban: **7.3 days** (target: 5 days)

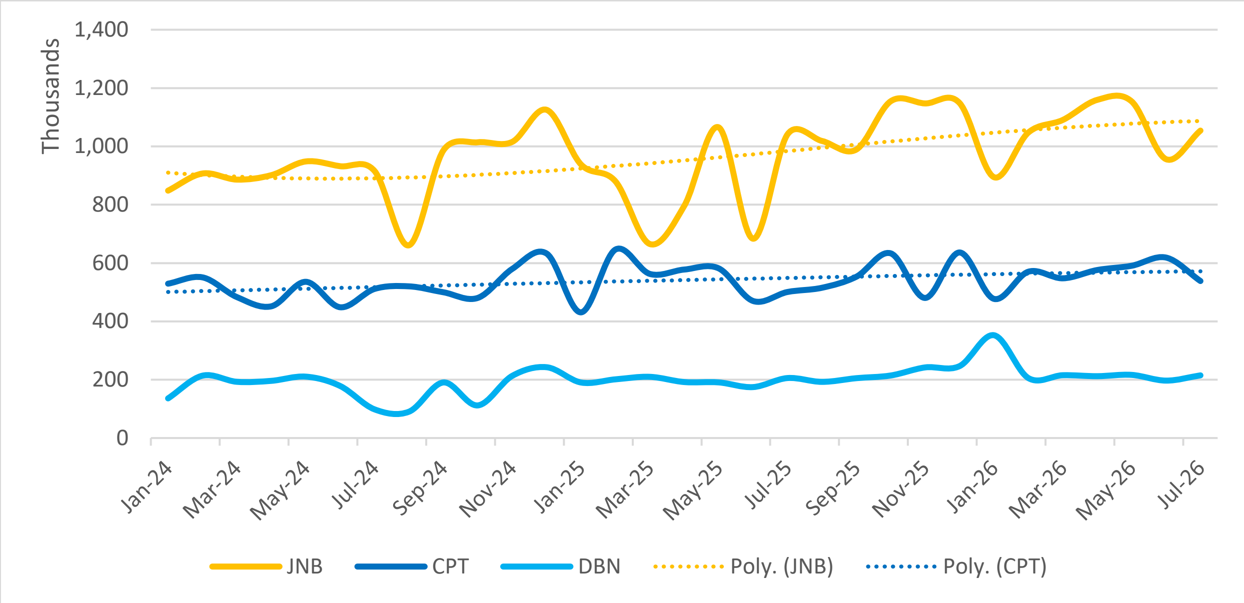
b. Domestic air cargo

For July, domestic volumes handled at our three main terminals mostly increased month-on-month – and remain up versus the same time last year:

- Johannesburg increased by **↑10%** (m/m) versus June – and is up by **↑1%** (y/y) versus 2025.
- Cape Town decreased by **↓13%** (m/m) but is up by **↑8%** (y/y) versus 2025.
- Durban increased by **↑9%** (m/m) and is up by **↑4%** (y/y) versus 2025.
- Consequently, total monthly domestic air cargo for July is up by **↑2%** (m/m) and by **↑3%** (y/y) versus 2025.

The following figure shows the movement since the start of 2024:

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 10/08/2026.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*3 to 9 August)*, movements decreased significantly – by around **126 trucks a day**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**).

- Truck volumes through the border post decreased to **1,488 HGVs per day** (**↓9%**, w/w).
- Overall, queue times **were mostly stable** at an average of **~4.5 hours** at the border.
- The average processing times **were also stable** at an average of **~4.3 hours** 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	1,488	1,477	1,135	205	39	65	60	274
% (w/w)	**-9%**	**-5%**	**-10%**	**-1%**	**18%**	**-15%**	**50%**	**-5%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 09/08/2026.

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

Figure 12 – Maputo vessel view (per vessel group)

Source: Marine Traffic. Updated 09/08/2026 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 decreased by around **an hour and a half** from last week, as transit time also decreased – by approximately **an hour and a quarter**.
- The median border crossing times at South African borders decreased by more **than three hours**, averaging **~7.7 hrs** (**↓28%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) also decreased – by about **three-quarters of an hour**, averaging **~6.3 hrs** (**↓13%**).

1. **Mozambique – enforcement of revised road-safety equipment requirements:**
    a. Enforcement of Mozambique's amended vehicle safety-equipment requirements has reportedly intensified sharply over the last 10 days.
    b. Although the relevant legislation was amended in December 2025, industry reports indicate that the changes were only made public shortly before becoming enforceable on 10 May 2026, contributing to uncertainty among transport operators.
    c. Mozambican transporters operating both within and outside the main North–South Corridor report widespread fines, affecting mineral, general cargo and tanker operators.
    d. One reported example involved an MZN 8,000 fine for a truck not carrying two traffic cones, despite the vehicle carrying hazard triangles.
    e. Operators have also raised concerns over increasingly restrictive policing of truck movements, particularly regarding access to certain roads and operating times.
    f. Industry has consequently requested formal clarification on which roads are restricted to heavy vehicles and the applicable time-based restrictions, to reduce uncertainty and inconsistent enforcement.
2. **Zambia – ASYCUDA connectivity disruption:**
    a. The Zambia Revenue Authority (ZRA) issued a notice on Wednesday advising stakeholders of connectivity problems affecting its ASYCUDA customs system.
    b. The disruption was temporary, with system connectivity reportedly restored later the same day, limiting the duration of the operational impact on customs processing and cross-border movements.

3. **Kasumbalesa – new northbound commercial traffic protocols**
    a. New protocols for commercial traffic passing through the "Whisky" customs clearance yard, approximately 15 km north of Kasumbalesa, came into effect on 10 August 2026.
    b. All northbound commercial vehicles are now required to pass through the Kasumbalesa border weighbridge before proceeding to Whisky.
    c. Vehicles receive a slip recording the load dimensions and associated measurements, which are subsequently checked against the declared information once the vehicle reaches the Whisky clearance yard.
    d. The additional control step introduces a further compliance requirement for northbound operators and will require close monitoring for any effects on traffic flow and clearance times at Kasumbalesa.

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

Table 7 – Delays[7] summary – South African borders[8] (both directions)

Border Post	Direction	HGV[9] 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	23.4	7.6	23.2	17,370	4,053
Beitbridge	Zimbabwe-SA	561	5.5	2.0	5.3	16,830	3,927
Groblersbrug	SA-Botswana	247	11.6	1.2	11.4	7,410	1,729
Martin's Drift	Botswana-SA	183	1.8	0.2	1.5	5,490	1,281
Kopfontein	SA-Botswana	146	6.6	2.0	6.4	4,380	1,022
Tlokweng	Botswana-SA	39	0.7	0.2	0.4	1,170	273
Vioolsdrift	SA-Namibia	30	2.0	1.2	4.1	900	210
Noordoewer	Namibia-SA	20	2.0	0.5	2.0	600	140
Nakop	SA-Namibia	30	4.0	1.0	3.6	900	210
Ariamsvlei	Namibia-SA	20	1.3	0.4	1.2	600	140
Skilpadshek	SA-Botswana	287	6.4	2.2	6.3	8,610	2,009
Pioneer Gate	Botswana-SA	88	0.0	0.0	0.0	2,640	616
Ramatlabama	SA-Botswana	182	2.8	1.1	2.5	5,460	1,274
Ramatlabama	Botswana-SA	95	0.6	0.1	0.4	2,850	665
Lebombo	SA-Mozambique	1,582	4.5	1.5	4.3	47,460	11,074
Ressano Garcia	Mozambique-SA	1,519	1.5	0.2	1.3	45,570	10,633
Sum/Average		**5,608**	**4.7**	**1.3**	**4.6**	**168,240**	**39,256**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 02/08/2026.

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	7.0	1.4	6.8	9,600	2,240
Central Corridor	798	1.9	0.5	1.9	23,940	5,586
Dar Es Salaam Corridor	1,819	16.5	1.7	16.4	54,570	12,733
Maputo Corridor	3,101	3.0	0.9	2.8	93,030	21,707

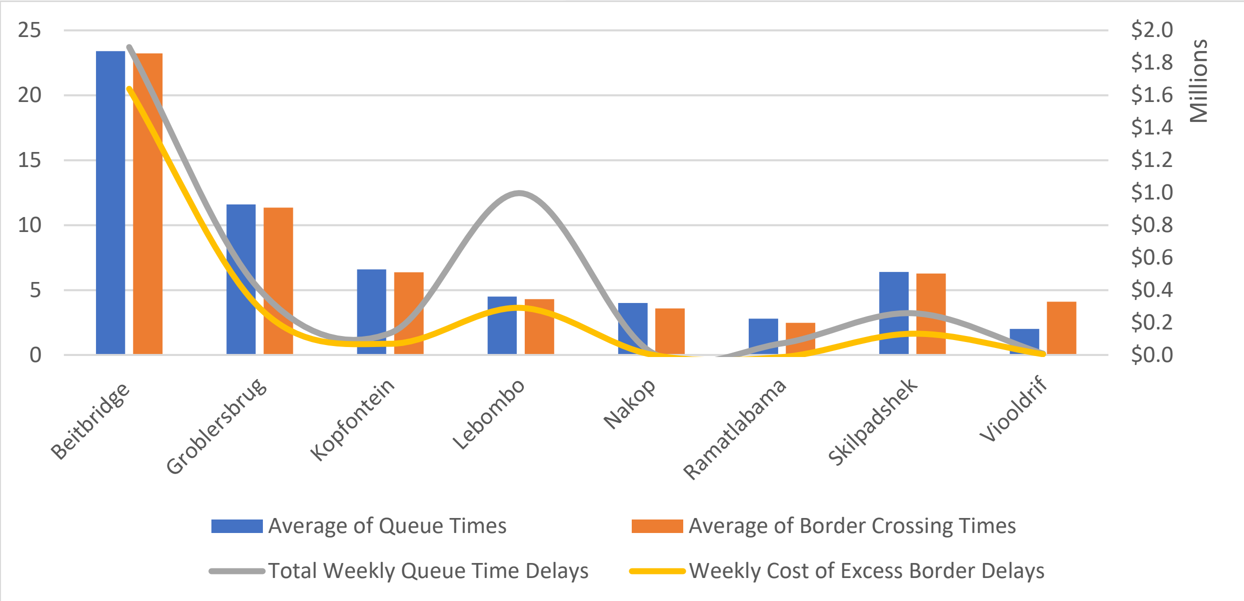
[7] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[8] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[9] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,695	14.4	2.3	14.2	110,850	25,865
Northern Corridor	2,817	1.7	0.2	1.3	99,840	23,296
WBNLD Corridor	867	2.6	0.8	2.4	26,010	6,069
Trans Cunene Corridor	100	2.3	0.8	2.7	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	20.1	3.8	19.7	3,480	812
Sum/Average	**13,860**	**6.6**	**1.1**	**6.5**	**431,130**	**100,597**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 02/08/2026.

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

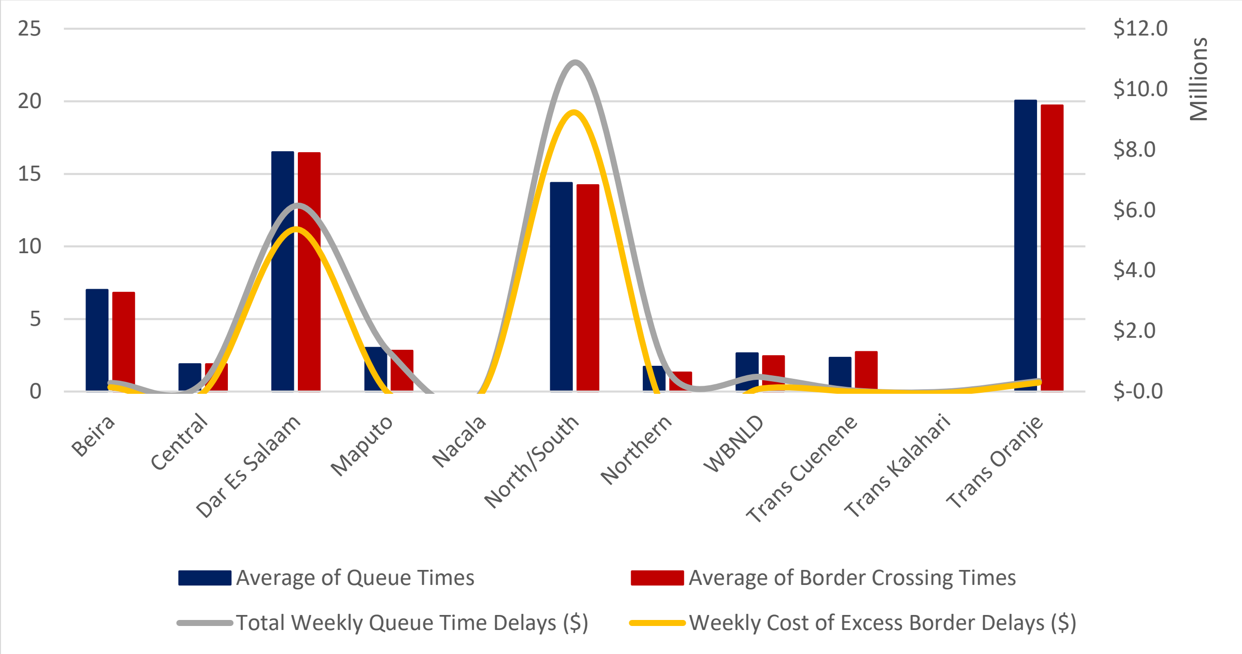
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 02/08/2026.

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

Figure 14 – Weekly cross-border delays & estimated cost from a corridor perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay, week ending 02/08/2026.

In summary, cross-border queue time averaged **~6.6 hours** (down by **~1.4 hours** from the previous week's **~8.1 hours**), indirectly costing the transport industry an estimated **$20.5 million** (**R333 million**). Furthermore, the week's average cross-border transit times hovered around **~6.5 hours** (down by **~1.2 hours** from the **~7.6 hours** recorded in the previous report), at an indirect cost to the transport industry of **$14.1 million** (**R229 million**). The total indirect cost for the week amounts to an estimated **~$34.6 million** (**R562 million**, down by **↓24%** from the **~R740 million** in the previous report).

4. International Update

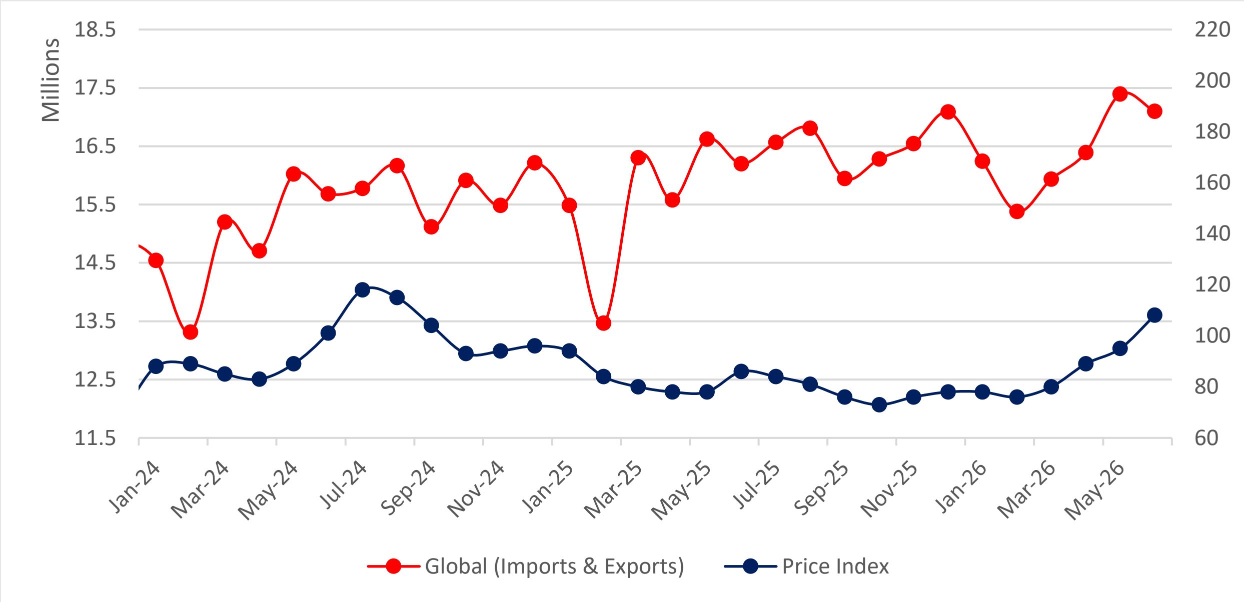
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

vii. Global container trade statistics for December

After record throughput levels last month, the latest container throughput figures from *Container Trade Statistics* (CTS) show that container volume remained elevated in June. Despite the widespread challenges facing the global shipping industry, the total throughput is down by **↓1.7%** monthly – but up by a substantial **↑5.5%** (y/y) annually, as global container volume continues to defy the prevailing logic. Regionally, throughput returns were mixed, with the most substantial increase occurring with SSA exports, which is up by **↑4.1%** (m/m); and the most substantial decrease occurring with North American exports, which is down by **↓9%** (m/m). Other notable changes include European imports and exports (down by **↓3.4%** and **↓3.8%**, respectively) and Far East exports (down by **↓0.5%**). For prices, the CTS global price index (dry and reefer combined) increased by a significant **↑14%** (m/m) and is up by more than a quarter (**↓25.6%**) yearly. Collectively, the following figure illustrates the global container throughput and price index since the start of 2024:

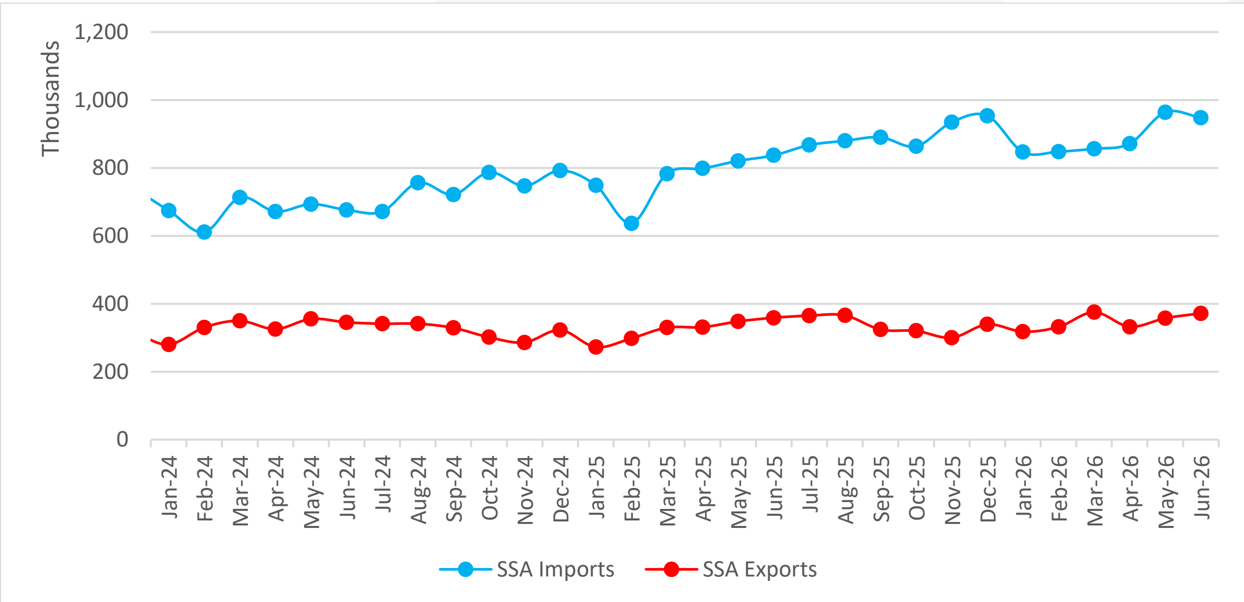
Figure 15 – Global Containerised Throughput (TEUs) and price index



Source: Calculated from CTS

Throughput in June reached **17.1 million TEUs** – some **300 thousand containers** below the record level achieved in May. Port congestion, schedule reliability, and the interrupted flows around the Red Sea remain material – albeit evidently less than perceived. The following figure shows Sub-Saharan African trade over the same period:

Figure 16 – Sub-Saharan Africa Containerised Throughput (TEUs)



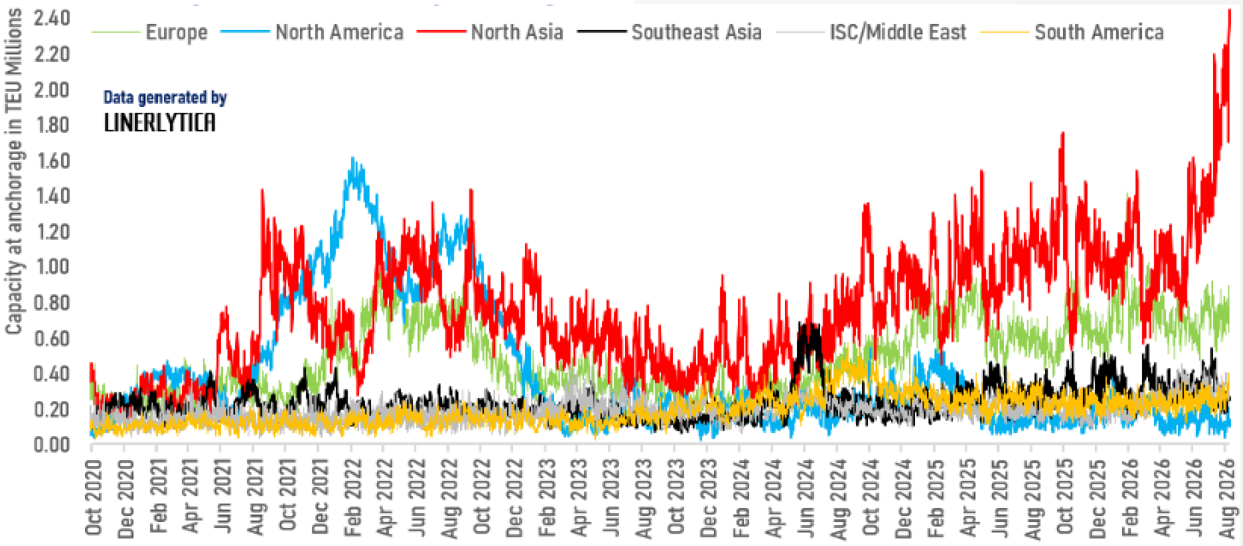
Source: Calculated from CTS

As mentioned above, SSA exports increased significantly in June and are up by **↑4.1%** (m/m) and approximately the same annually (**↑3.7%**). Imports, on the other hand, decreased by **↓1.6%** monthly, but remain up by a substantial **↑13.3%** (y/y). South Africa's improved throughput of late has also meant that the country's share in SSA containerised trade stands at **61%** for exports and **24%** for imports.

viii. Global container port congestion

Port congestion across North Asia has surged with more than **2.4 million TEU of containership capacity currently stranded** as *Typhoon Dolphin* hit China's eastern coasts on 9 August 2026. The tropical storm is the third and strongest to hit China in the last 5 weeks alone, forcing ships to take shelter away from the path of the typhoon. Vessel delays are expected to be protracted, with Ningbo and Shanghai the worst affected ports, with terminal operations halted from 7th and 8th August. The congestion has also spread to ports in Southern China and would take a few weeks to clear the vessel backlog.

Figure 17 – Port congestion breakdown by main region



Source: Linerlytica

Fortunately, Durban's congestion has again subsided this week, as the port's *queue-to-berth* ratio, as reported over the last three weeks, further dropped to **0.58** this week, which is encouraging.[10]

ix. Strait of Hormuz summary

Shipping conditions across the Middle East remain highly constrained as diplomatic efforts between the US and Iran remain deadlocked. The June interim agreement has effectively unravelled, with Tehran reporting no progress towards reviving the deal and maintaining that the Strait of Hormuz will remain closed until its conditions are met. Consequently, commercial traffic remains exceptionally limited, with Linerlytica recording only two outbound containership passages last week. Conversely, traffic through Bab el-Mandeb is increasing, as CMA CGM and Maersk return three additional services to the Suez route despite continuing Houthi threats. This gradual return is partly aimed at relieving vessel and equipment shortages aggravated by persistent congestion across North Asia and Europe, with COSCO potentially set to follow.

b. Global air cargo industry

The latest weekly data from WorldACD show that global air cargo growth moderated towards the end of July, with worldwide tonnage nevertheless increasing by ↑**2%** (m/m) and ↑**5%** (y/y) for the month. The

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[10] Linerlytica. 09/08/2026. Port Congestion.

slowdown was driven largely by weaker Asia–Europe traffic, as combined China and Hong Kong volumes to Europe fell by **↓9%** (m/m) and **↓12%** (y/y) amid higher costs and new EU import requirements.

Figure 18 – Capacity, chargeable weight and rates (past two to five weeks)

Origin Regions last 2 to 5 weeks	Capacity[1]			Chargeable weight[1]			Rate[1]		
WORLD ACD	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-1%	+4%		-6%	+1%		+2%	+23%
Asia Pacific		+0%	+3%		-1%	+5%		-2%	+20%
C. & S. America		+2%	+5%		-1%	+4%		-2%	+7%
Europe		+0%	+0%		-0%	-0%		-2%	+20%
M. East & S. Asia		-3%	+2%		-1%	+4%		-1%	+46%
North America		+0%	+1%		-1%	+2%		-0%	+20%
Worldwide		-0%	+1%		-1%	+3%		-1%	+22%

Source: WorldACD

Global spot rates averaged **$3.41/kg** in July, down **↓8%** (m/m) but still **↑29%** (y/y). More recent WorldACD data show worldwide capacity broadly unchanged over the latest two-week period, while chargeable weight and rates declined by **↓1%**. However, they remained **↑3%** and **↑22%** higher year-on-year, respectively.

ENDS[11]

[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.*