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Cargo Movement Update #295[1]

Date: 16 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)	39,018	44,453	**83,471**	45,358	58,320	**103,678**	**↓19%**
Air Cargo (tons)	4,209	2,508	**6,717**	4,237	2,530	**6,767**	**↓1%**

Monthly Snapshot

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

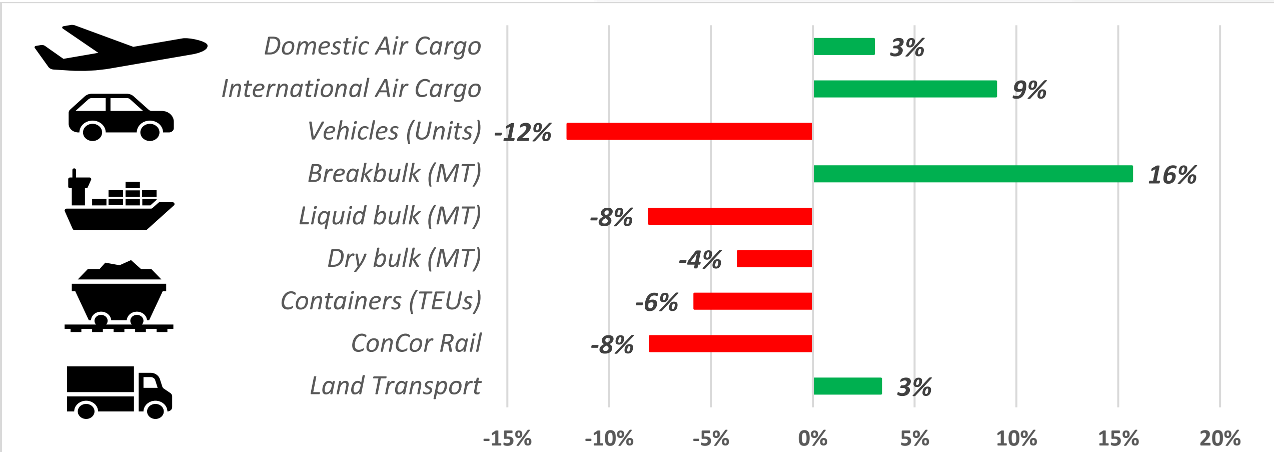
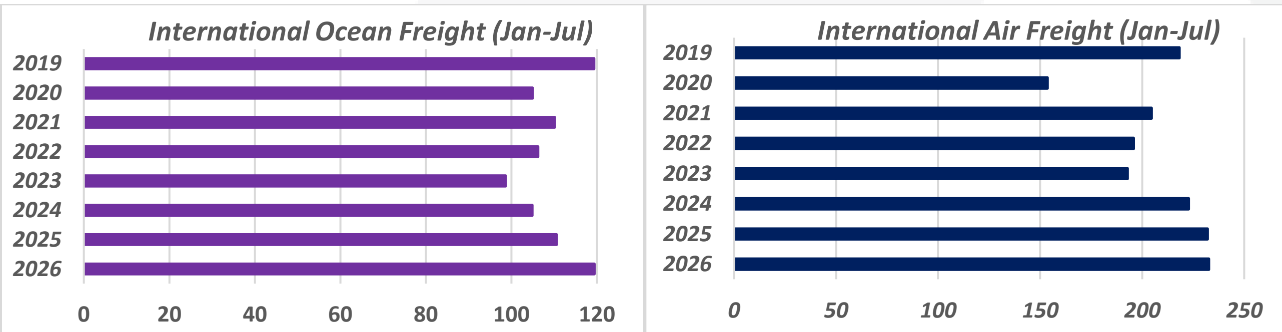


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **11,924 TEUs** was handled per day, with **13,163 TEUs** projected for next week.
- TNPA figures for July – TEUs: **↓10%** (m/m) & **↓6%** (y/y). Bulk: **↓1%** & **↑11%**. Vehicles: **↓3%** & **↑12%** (y/y).
- Rail cargo handled out of Durban was reported at **2,161** containers, down by **↓33%** from last week.
- Cross-border queue: **↑0.3 hrs**; transit: **↑0.3 hrs**; SA borders: **~9 hrs** (**↑17%**); SADC: **~6.4 hrs** (**↑2%**).
- Global port congestion, according to *Sea-Intelligence,* is removing **~1.7m TEUs of capacity** from the market.
- Global air cargo softened in early August, with worldwide tonnage falling **↓4%** (w/w); rates at **$2.95/kg**.

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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 *295th* 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: July vs. July.
[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 **11,924 TEUs** was handled daily, a decrease from **14,811 TEUs** the previous week.

Port operations showed a decline in waterside volumes across most terminals, with volumes remaining above target volumes for the week. Some weather delays were reported across ports in the Cape regions, while the Navis upgrade placed some pressure on port operations in Durban. Some congestion is anticipated in the coming week, particularly in Durban, as the terminals work towards recovering from the Navis upgrade and further systems-related challenges.

The **global shipping industry remains heavily constrained by congestion and geopolitical disruption**. Port delays are estimated to be absorbing around **1.7 million TEUs of effective capacity**, with severe congestion evident across Asia and Africa, compounded by extreme weather, high yard utilisation and vessel bunching. Meanwhile, carriers continue to expand aggressively, with the **containership orderbook reaching a record 41.7% of the existing fleet**, while Maersk signals renewed investment in new tonnage after years of restrained growth. Geopolitical risks remain equally significant: the **Strait of Hormuz remains effectively constrained**, with vessel traffic far below normal levels and diplomatic prospects deteriorating. The disruption is increasing **rerouting, insurance, bunker and schedule-reliability risks**, particularly for Gulf services and regional transhipment networks.

International air cargo to ORTIA was mostly stable this week – decreasing only ever so slightly. The daily average amounted to **~601,000 kg** inbound (**↓1%**, w/w) and **~358,000 kg** outbound (**↓1%**). 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%**).

Global air cargo demand softened in early August, with worldwide tonnage falling **↓4%** (w/w), reflecting declines across all major origin regions and additional disruption to Asian exports from Typhoon Dolphin. Despite weaker volumes, global airfreight rates remained resilient at **$2.95/kg, ↑22% above year-ago levels**, while capacity remained broadly stable.

On the N4 corridor, movements increased slightly – by around **45 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 **1,533 HGVs per day** (**↑3%**, w/w). Overall, queue times **decreased slightly** to an average of **~4.2 hours** (**↓2%**) at the border. The average processing times also **decreased slightly** to an average of **~4.2 hours** (**↓2%**) per crossing.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts increased by **↑8.8%** (m/m). Northbound traffic (Eastbound for Lebombo) increased substantially, notably at **Ramatlabama** (**↑28%**) and **Beitbridge**/**Lebombo**/**Skilpadshek** (all **↑8%**). Southbound traffic (Westbound for Lebombo) increased at **Beitbridge** (**↑10%**) and Groblersbrug/Skilpadshek (both **↑9%**), whilst decreasing at **Ramatlabama** (**↓13%**).

Weekly land border crossing figures in the SADC region show that the average queue time increased by around **a quarter of an hour** from last week, as transit time also increased – by approximately **the same magnitude**. The median border crossing times at South African borders increased by more than **an hour and a half**, averaging **~9 hrs** (**↑17%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) was broadly stable, averaging **~6.4 hrs** (**↑2%**). This week, on average, **four** SADC borders again took a day or more to cross, namely Beitbridge, Chirundu OSBP, Cuchamano, and Kasumbalesa (the worst affected, taking around **three days** to cross from the **Zambian side**).

Cross-border developments this week included: **(1)** commencement of construction on the **Ressano Garcia One-Stop Border Post**, a **$15.3 million upgrade** expected to improve processing capacity, integration and corridor efficiency materially; **(2)** continued **N4/Lebombo congestion** due to stop-and-go controls, roadworks, truck parking and temporary infrastructure breakdowns; **(3)** a **power and connectivity outage at Kopfontein**, with operations maintained on backup power; and **(4)** clarification of **Mozambique trailer permit requirements**, confirming that a separate trailer permit is only required where the trailer registration differs from that of the truck/horse.

In closing, this week's operational deterioration at Durban Gateway Terminal again demonstrates that logistics performance is a **system outcome, not the product of any single node**. Waterside volumes fell by **↓26%**, yet the principal constraint originated on the landside, where reduced yard fluidity and stack occupancy above **80%** ultimately impaired vessel productivity. *Maersk* reported vessel waiting times **of 8-12 days**, as the *queue-to-berth* ratio (as measured by *Linerlytica*) **exceeded 1.00** at the start of the week. Whether straddles move containers, reach stackers or proverbial wheelbarrows is secondary; what matters is whether cargo flows efficiently. The greater concern is therefore coordination: **transparent communication, shared accountability and timely intervention** across terminal, shipping line, transporter and other interfaces. In an interconnected logistics system, allowing one node to remain constrained transfers the problem elsewhere. Sometimes restoring overall flow may require temporarily slowing — or even pausing — one node to reset the system.

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 10 to 16 August (measured in TEUs)

7-day flow reported (10/08/2026 – 16/08/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Old Pier 2)	3,685	25,793	**↓26%**
New Pier (Pier 1)	2,036	14,250	**↓12%**
Cape Town Container Terminal	2,187	15,310	**↓4%**
Ngqura Container Terminal	2,391	16,737	**↓20%**
Port Elizabeth Container Terminal	656	4,594	**↓20%**
Other	970	6,787	**↓32%**
Total	**11,924**	**83,471**	**↓19%**

Source: Calculated from TPT, 2026. Updated 16/08/2026.

An average of **~11,924 TEUs** (**↓19%**) was handled per day for the last week (*10 to 16 August, Table 2*). Consequently, throughput was below the projected average of **~12,943 TEUs** (**↓8%** actual versus projected). For the coming week, an increased average of **~13,163 TEUs** (**↑10%**) is predicted to be handled (*17 to 23 August*, *Table 3*).

Table 3 – Container Ports – Weekly flow projected for 17 to 23 August (measured in TEUs)

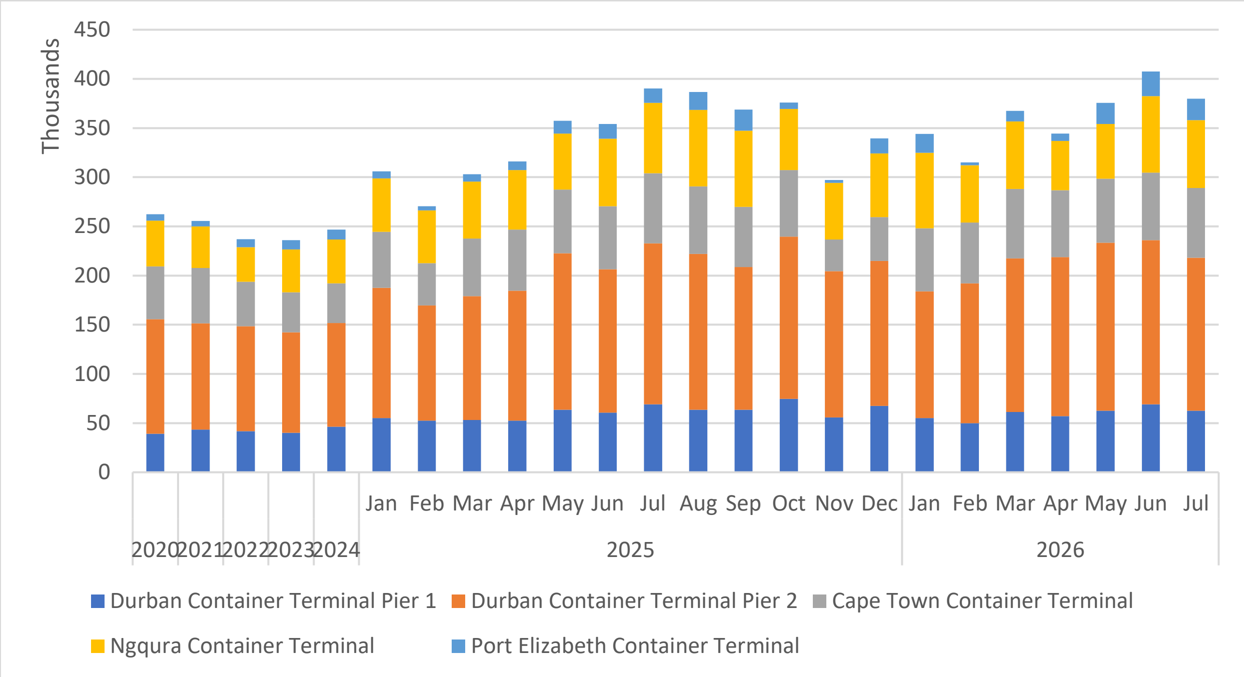
7-day flow projected (17/08/2026 – 23/08/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Old Pier 2)[6]	5,571	39,000	**↑51%**
New Pier (Pier 1)	2,105	14,737	**↑3%**
Cape Town Container Terminal	1,902	13,312	**↓13%**
Ngqura Container Terminal	2,264	15,848	**↓2%**
Port Elizabeth Container Terminal	425	2,976	**↓35%**
Other	896	6,270	**↓8%**
Total	**13,163**	**92,143**	**↑10%**

Source: Calculated from TPT, 2026. Updated 16/08/2026.

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 16/08/2026.

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 Thursday afternoon:

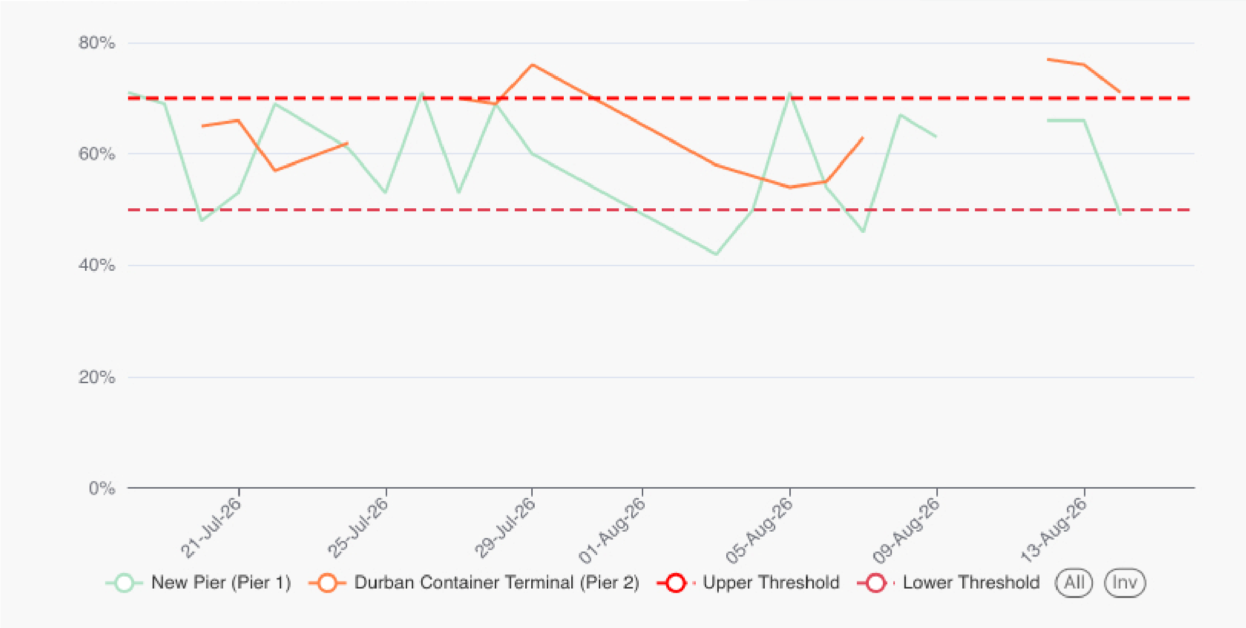
Table 4 – Vessel Dwell Time

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	DGT	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 19/08/2026.

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

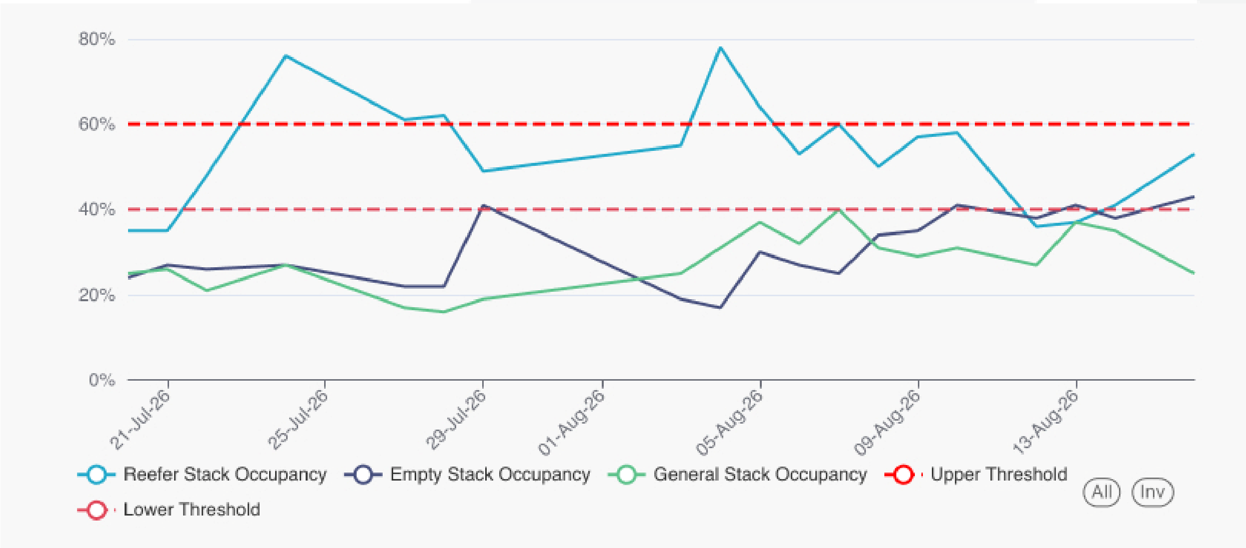
Figure 4 – Stack occupancy in Durban, general-purpose containers (17 July to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 16/08/2026.

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 (19 July to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 16/08/2026.

b. TNPA: July update

TNPA has released consolidated port statistics for July[7], with the figures showing that:

- Container throughput totalled **411,056 TEUs**, which is down by **↓10%** (m/m) and by **↓6%** (y/y).

[7] Transnet. 2026. Port statistics.

- Total bulk cargo totalled **18,929 million tonnes**, which is down by **↓1%** (m/m), but up by **↑11%** (y/y).
- Vehicle throughput totalled **84,646 units**, which is down by **↓3%** (m/m), but up by **↑12%** (y/y).

The following table shows the changes from June per sub-sector group:

Table 5 – TNPA – Monthly volume and growth: July 2026

	June	July	Movement	% change
Containers (TEUs)	**454,460**	**411,056**	**-43,404**	**-10%**
Landed	229,126	214,743	-14,383	-6%
Shipped	225,334	196,313	-29,021	-13%
Dry bulk (MT)	15,424,602	15,649,544	224,942	1%
Liquid bulk (MT)	3,153,986	2,718,142	-435,844	-14%
Breakbulk (MT)	578,216	561,027	-17,189	-3%
Vehicles (Units)	86,979	84,646	-2,333	-3%
Total cargo (excl. Vehicles)	**19,156,804**	**18,928,713**	**-228,091**	**-1%**

Source: Calculated from TNPA, updated 13/08/2026.

The main throughput levels are mixed versus last year, but have mostly increased in comparison to pre-pandemic numbers of 2019 (except for liquid bulk):

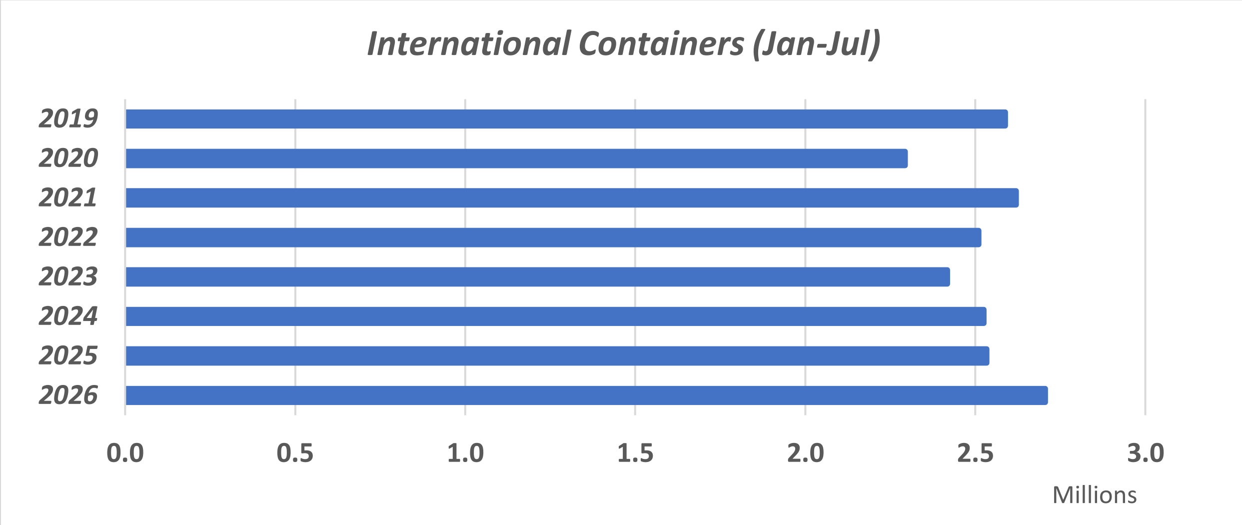
Table 6 – TNPA – Cyclical volume and growth: July 2019, 2025, and 2026

	2019	2025	2026	Growth: '19-'26	Growth: '25-'26
Containers (TEUs)	**386,813**	**436,428**	**411,056**	**6%**	**-6%**
Landed	197,148	222,948	214,743	9%	-4%
Shipped	189,665	213,480	196,313	4%	-8%
Dry bulk (MT)	13,428,462	13,528,456	15,649,544	17%	16%
Liquid bulk (MT)	3,438,448	3,090,421	2,718,142	-21%	-12%
Breakbulk (MT)	285,104	470,204	561,027	97%	19%
Vehicles (Units)	69,341	75,662	84,646	22%	12%
Total cargo (excl. Vehicles)	**17,152,014**	**17,089,081**	**18,928,713**	**10%**	**11%**

Source: Calculated from TNPA, updated 13/08/2026.

Similar to *Figure 2*, the following table illustrates the year-to-date container throughput, which, despite the reduction in July, is still up by **↑6.8%** (y/y):

Figure 6 – Year-to-date flows 2019-2026: ocean, (y/y) (TEUs, millions)



Source: Calculated from TNPA, updated 13/08/2026.

c. Summary of port operations

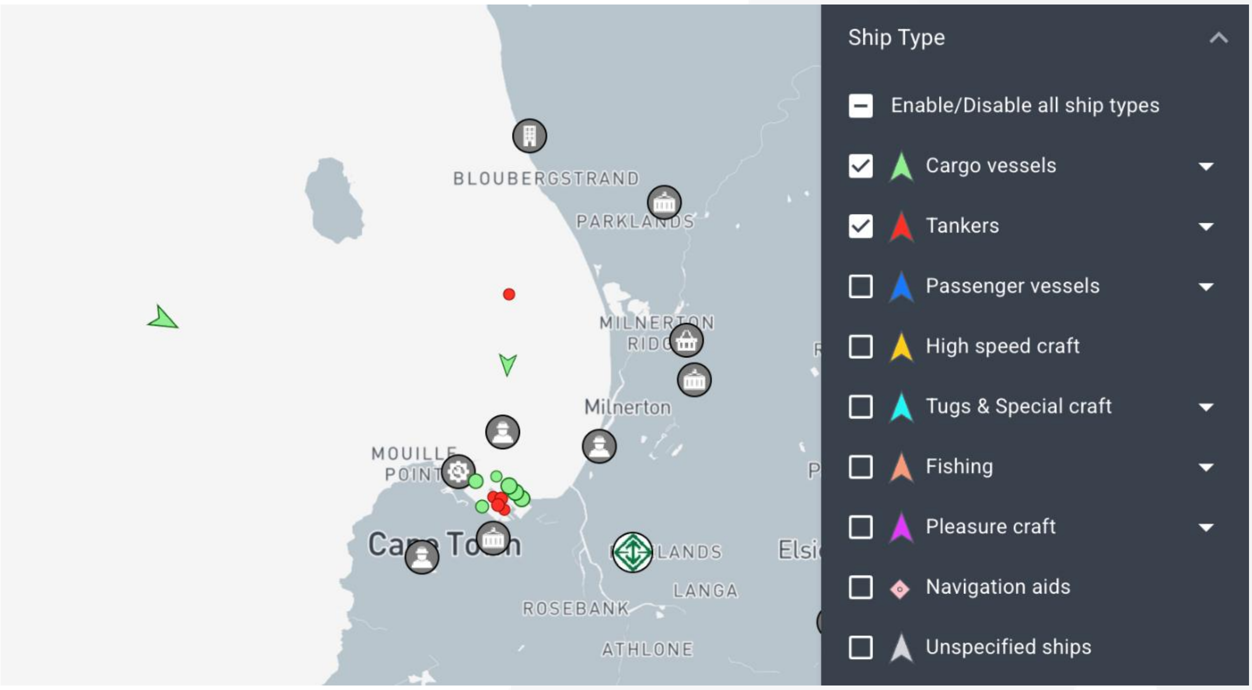
i. Cape Town

Cape Town Container Terminal reported a minor decline in waterside volumes, following a strong update the previous week. Performance remained strong, with the terminal moving 115% of the target volume for the week. Vessels spent around an hour at anchorage and 37 hours at berth, showing strong performance in spite of some weather delays early in the week and a slow start to the week, particularly on the landside.

Cape Town Multi-Purpose Terminal reported a significant decline in waterside volumes, falling 17% below the target for the week, against a very strong previous week. Vessels spent an average of 17 hours at anchorage and 89 hours at berth, significantly higher than the previous week. Some delays are expected for the coming week due to planned maintenance.

The AGL Terminal reported a 123% increase in waterside volumes from the previous week. The vessel berthed on arrival and worked for around 66 hours and is currently on layby. The terminal reported working one of two cranes, reporting one breakdown, with no weather delays reported.

Figure 7 – Cape Town vessel view (per vessel group)



Source: Marine Traffic. Updated 16/08/2026 at 14:00.

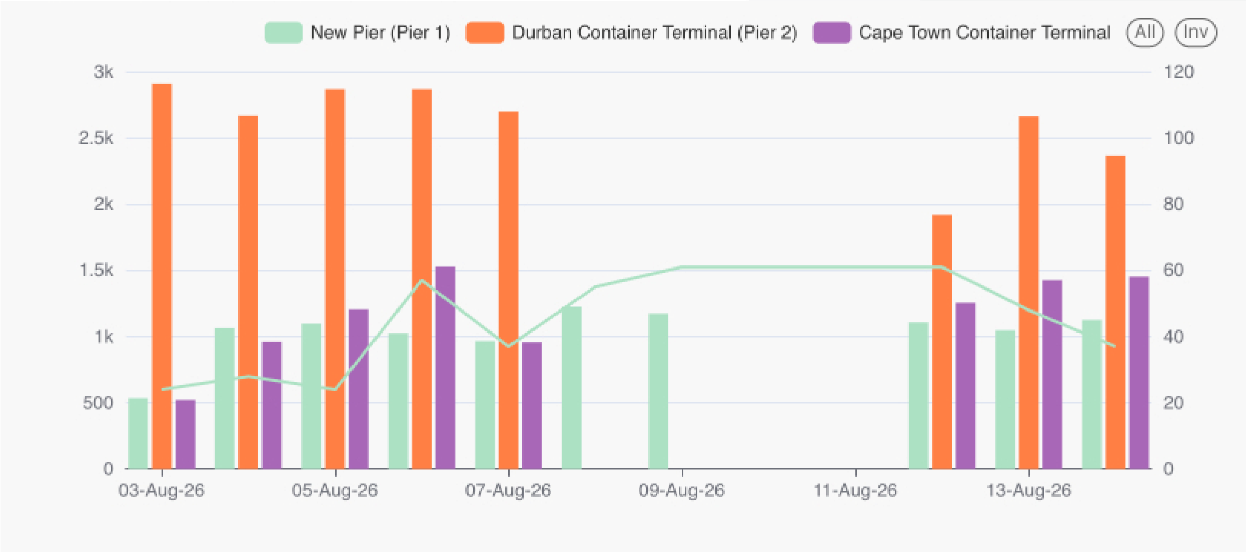
ii. Durban

Pier 1 reported a decline in waterside volumes, falling just below the target for the week. Vessels spent an average of 39 hours at anchorage and 84 hours at berth. The terminal operated with an average of four out of seven cranes and 25 out of 25 RTGs throughout the week. An increase in vessel turnaround time, particularly time at anchorage, as the average number of vessels waiting at anchorage increased to four towards the end of the week. The **TTT** for the week averaged **~48 minutes** (**↑20%**, w/w), and the average **staging time** was **~27 minutes** (**↓13%**).

Durban Gateway Terminal showed a significant decrease in waterside volumes (down by 26% from the previous week), meeting only 66% of targeted volumes. Vessel turnaround time went down, with vessel time at anchorage down from 131 hours to 66 hours, and an average time at berth of 70 hours. An average of four vessels were waiting at anchorage across the week. Roadside volumes started slow but picked up towards the end of the week. DGT shut down landside operations over the weekend for the upgrade of the Navis system, which was completed on Saturday, though operations were significantly impacted, and delays are spilling over into the current week, as the terminal and industry work to catch up on the backlog caused by the shutdown.

Durban Multi-Purpose Terminal reported a decline of 20% in waterside volumes, though the actual volumes were 3% above the target volumes. Time at anchorage fell to 112 hours, though still elevated, with an increased 83 hours at berth. The terminal reported an average of two out of four cranes operational across the week.

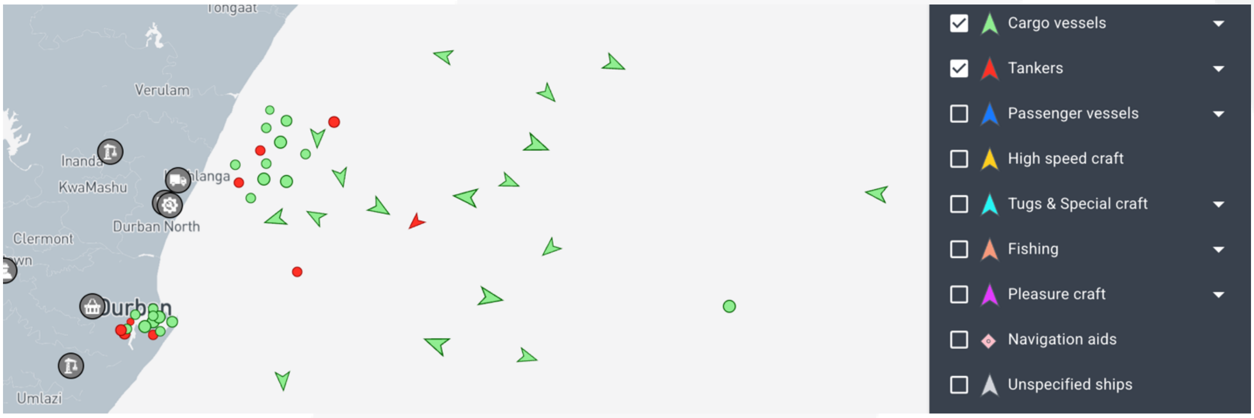
Figure 8 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 16/08/2026.

The queue of container vessels waiting outside Durban **increased** this week. On Wednesday afternoon (19 August), **ten** container vessels were waiting outside at anchorage for Durban, **seven** for DGT, **two** for Pier 1, and **one** for Point. The queue of dry (**four**), liquid (**four**), and breakbulk (**three**) vessels **was stable** from last week:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 16/08/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal's waterside volumes showed a decline, though volumes were 6% above target volumes, in spite of weather delays reported on Tuesday and Thursday. Vessels spent an average of 38 hours at anchorage and 58 hours at berth. The terminal reported an average of seven out of eight cranes and 25 out of 30 RTGs available throughout the week.

Port Elizabeth Container Terminal also reported a 20% decrease in waterside volumes, though remaining well above target volumes, in spite of weather delays reported towards the end of the week. Vessels spent an average of 21 hours at anchorage, and 55 hours at berth. The terminal reported two STS cranes in operation throughout the week, along with 15 straddle carriers against the target of 11.

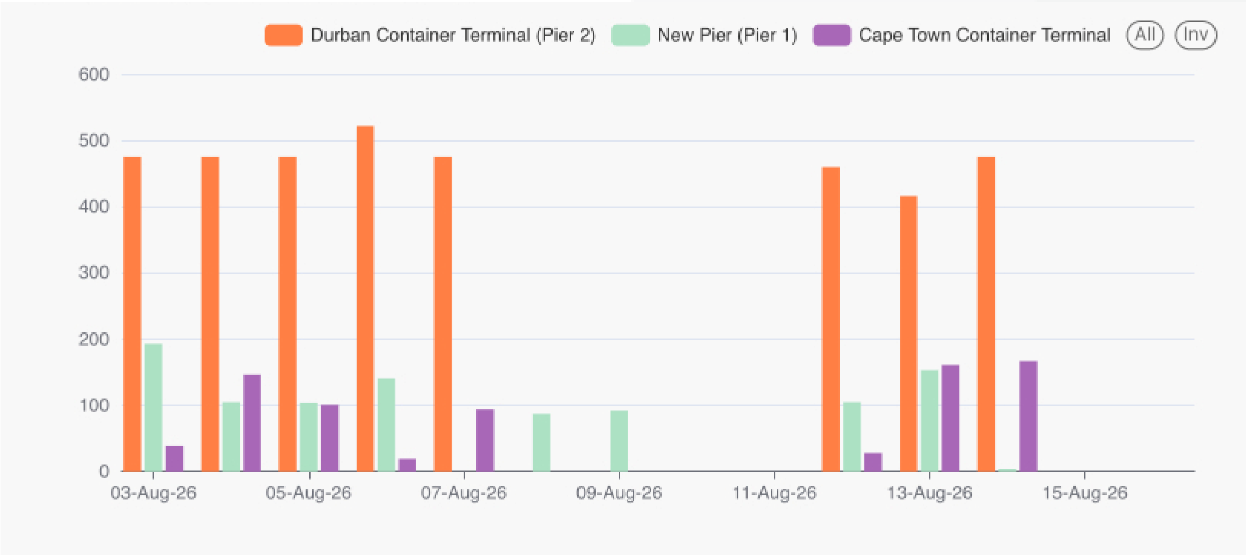
iv. Richards Bay

At RBCT, the daily average coal throughput for the week **decreased considerably** and averaged close to **100,000 tons** (**↓37%**, w/w) a day. With an average of **20 trains per day** being serviced, below the target of 22.

v. Transnet Freight Rail (TFR)

In the last week (*10 to 16 August*), rail cargo on the ConCor line out of Durban was reported at **2,161** containers, down by **↓33%** from the previous week's **3,232** containers.

Figure 10 – TFR: Rail handled (Pier 1, Pier 2, and CTCT)



Source: Calculated using data from Transnet, 2025. Updated 16/08/2026.

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 (*10 to 16 August*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *August 2025* was **~935,374 kg**.

Table 7 – International inbound and outbound cargo from OR Tambo

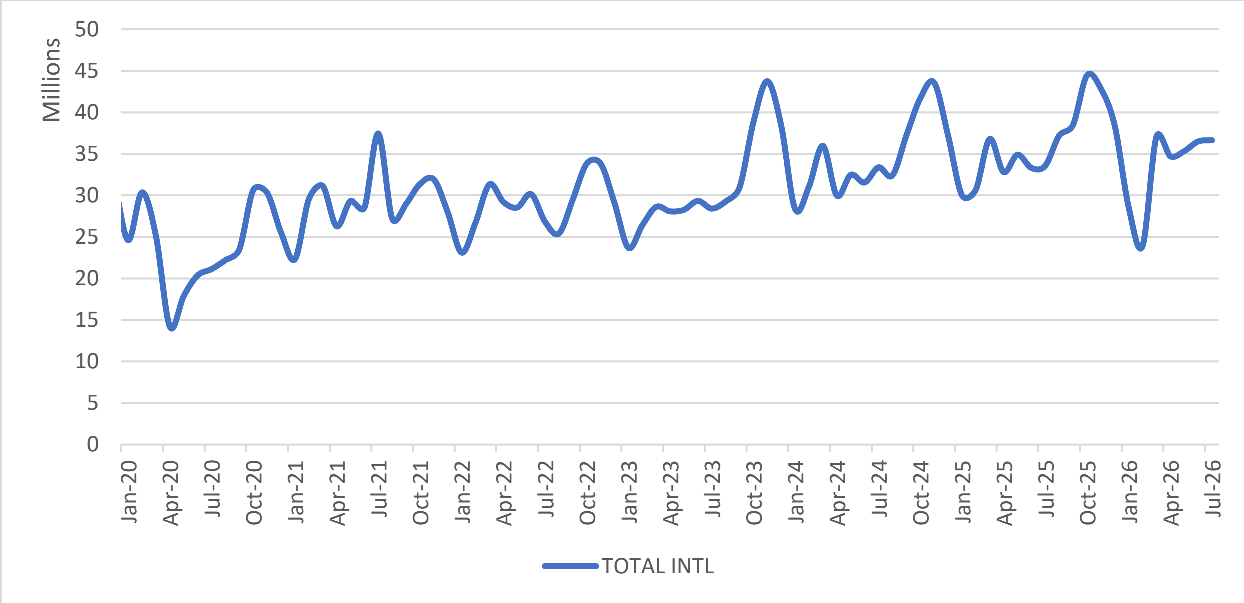
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**601,278**	**4,208,949**	**↓1%**
Volume outbound	**358,231**	**2,507,614**	**↓1%**
Total	**959,509**	**6,716,563**	**↓1%**

Courtesy of ACOC. Updated: 16/08/2026.

International air cargo to ORTIA was mostly stable this week – decreasing only ever so slightly. The daily average amounted to **~601,000 kg** inbound (**↓1%**, w/w) and **~358,000 kg** outbound (**↓1%**). 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%**).

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

Figure 11 – International cargo: All terminals (kg millions)



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

The latest reported fuel stock days (as of Tuesday afternoon, 18 August) per airport indicate:

- ORTIA: **6.6 days** (target: 5 days)
- CTIA: **3.9 days** (target: 4 days)
- Durban: **11.6 days** (target: 5 days)

3. Road and Regional Update

a. Lebombo border post update

In the last week (*10 to 16 August)*, movements increased slightly – by around **45 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 **1,533 HGVs per day** (**↑3%**, w/w).
- Overall, queue times **decreased slightly** to an average of **~4.2 hours** (**↓2%**) at the border.
- The average processing times also **decreased slightly** to an average of **~4.2 hours** (**↓2%**) per crossing.

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

Table 8 – 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	1,533	1,510	1,236	161	25	71	32	234
% (w/w)	**3%**	**2%**	**8%**	**-28%**	**-58%**	**8%**	**-91%**	**-17%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 16/08/2026.

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 16/08/2026 at 14:00.

b. SADC cross-border and road freight update

The following table shows the consolidated monthly flow of HGVs across some of the key borders for July:

Table 9 – HGVs – Main South African borders (both directions)

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	16,758	**8%**	9,722	**14%**	26,480	**10%**
Groblersbrug	6,830	**6%**	5,294	**13%**	12,542	**9%**
Kopfontein	6,102	**-3%**	1,667	**18%**	7,769	**1%**
Lebombo	48,112	**8%**	46,937	**7%**	95,049	**7%**
Ramatlabama	4,425	**28%**	3,012	**40%**	8,664	**-13%**
Skilpadshek	8,877	**8%**	2,708	**10%**	11,585	**9%**

Source: TransAfricaBorder, 10/08/2026.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts increased by **↑8.8%** (m/m). Northbound traffic (Eastbound for Lebombo) increased substantially, notably at **Ramatlabama** (**↑28%**) and **Beitbridge/Lebombo/Skilpadshek** (all **↑8%**). Southbound traffic (Westbound for Lebombo) increased at **Beitbridge** (**↑10%**) and Groblersbrug/Skilpadshek (both **↑9%**), whilst decreasing at **Ramatlabama** (**↓13%**).

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 **a quarter of an hour** from last week, as transit time also increased – by approximately **the same magnitude**.
- The median border crossing times at South African borders increased by more than **an hour and a half**, averaging **~9 hrs** (**↑17%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) was broadly stable, averaging **~6.4 hrs** (**↑2%**).

1. **Ressano Garcia One-Stop Border Post construction:**
    a. On Monday, 17 August, **construction commenced on the Ressano Garcia OOSBP**, representing a major upgrade to the Maputo Logistics Corridor.[8]
    b. The approximately **$15.3 million project** will expand passenger and freight facilities, widen access to the KM4 freight terminal, introduce new truck access routes and invest in the digitalisation, automation and integration of border-control systems.
    c. Once completed, the **one-stop model will collocate South African and Mozambican immigration and customs processes**, eliminate separate stops and improve border predictability.
    d. Dedicated express lanes for mineral trucks are expected to reduce processing times from **45–60 minutes to around five minutes**, while general cargo processing could fall to approximately **30 minutes**, materially improving corridor efficiency and competitiveness.
2. **Stop-and-go controls on N4:**
    a. On Tuesday, 18 August, **stop-and-go controls continued to constrain N4 traffic flow near the Lebombo Border Post**, compounded by a breakdown at the Mozambique asphalt plant that resulted in the 12-hour stop/go remaining continuously operational.
    b. A further short stop/go on the South African side, truck parking near the border, and a breakdown on the truck bypass—leaving only one export lane open—added to congestion.
    c. The disruptions are expected to ease once TRAC completes the ongoing roadworks, after which road conditions should improve materially.
3. **Kopfontein:**
    a. A power and connectivity outage occurred on Wednesday morning; however, **border operations continued on backup power**, avoiding a complete operational stoppage.
4. **Mozambique:**
    a. Clarification was obtained regarding trailer permit requirements following an enforcement query near the Masano/Dedza area.
    b. A **separate trailer permit is required only where the trailer registration differs from that of the truck/horse**; where registrations correspond, only the permit for the horse is required.

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

Table 10 – Delays[9] summary – South African borders[10] (both directions)

Border Post	Direction	HGV[11] 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	648	25.7	7.3	26.0	19,440	4,536
Beitbridge	Zimbabwe-SA	581	5.9	2.1	5.6	17,430	4,067
Groblersbrug	SA-Botswana	214	17.8	1.3	17.5	6,420	1,498
Martin's Drift	Botswana-SA	171	3.1	0.3	3.1	5,130	1,197
Kopfontein	SA-Botswana	218	8.9	1.3	8.5	6,540	1,526
Tlokweng	Botswana-SA	37	0.7	0.2	0.4	1,110	259
Vioolsdrift	SA-Namibia	30	4.7	1.3	4.4	900	210
Noordoewer	Namibia-SA	20	2.2	1.1	2.2	600	140

[8] Club of Mozambique. 14/08/2026. Mozambique: Works on Ressano One-Stop Border Post with South Africa to begin on Monday.
[9] 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.
[10] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[11] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Border Post	Direction	HGV[11] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Nakop	SA-Namibia	30	4.1	0.5	4.1	900	210
Ariamsvlei	Namibia-SA	20	1.2	0.3	1.1	600	140
Skilpadshek	SA-Botswana	273	5.3	2.1	5.2	8,190	1,911
Pioneer Gate	Botswana-SA	82	0.0	0.0	0.0	2,460	574
Ramatlabama	SA-Botswana	184	2.6	0.4	2.5	5,520	1,288
Ramatlabama	Botswana-SA	87	0.5	0.1	0.3	2,610	609
Lebombo	SA-Mozambique	1,475	4.4	1.6	4.2	44,250	10,325
Ressano Garcia	Mozambique-SA	1,485	1.3	0.2	1.2	44,550	10,395
Sum/Average		**5,555**	**5.5**	**1.2**	**5.4**	**166,650**	**38,885**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 09/08/2026.

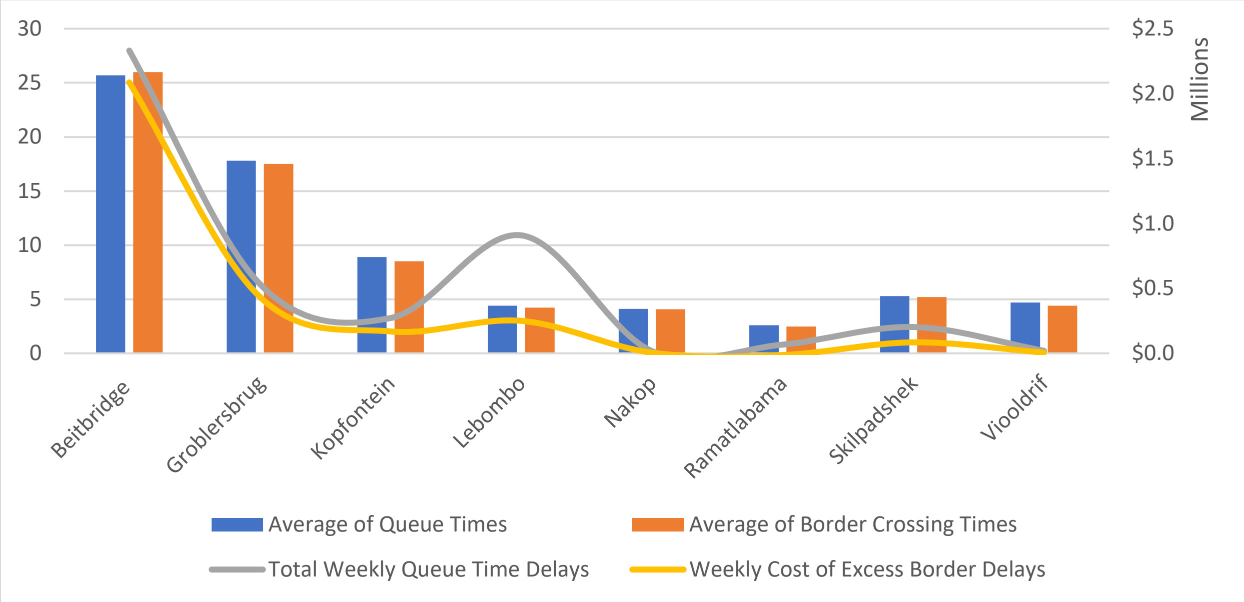
Table 11 – Delays summary – Corridor perspective

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	6.7	1.6	6.6	9,600	2,240
Central Corridor	798	3.5	0.3	2.7	23,940	5,586
Dar Es Salaam Corridor	1,819	15.2	4.0	15.1	54,570	12,733
Maputo Corridor	2,960	2.9	0.9	2.7	88,800	20,720
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,739	16.6	3.2	16.5	112,170	26,173
Northern Corridor	2,817	0.8	0.2	0.7	92,520	21,588
WBNLD Corridor	911	2.8	0.6	2.6	27,330	6,377
Trans Cunene Corridor	100	3.1	0.8	2.9	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	14.5	1.3	14.3	3,480	812
Sum/Average	**13,807**	**6.9**	**1.4**	**6.7**	**422,220**	**98,518**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 09/08/2026.

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

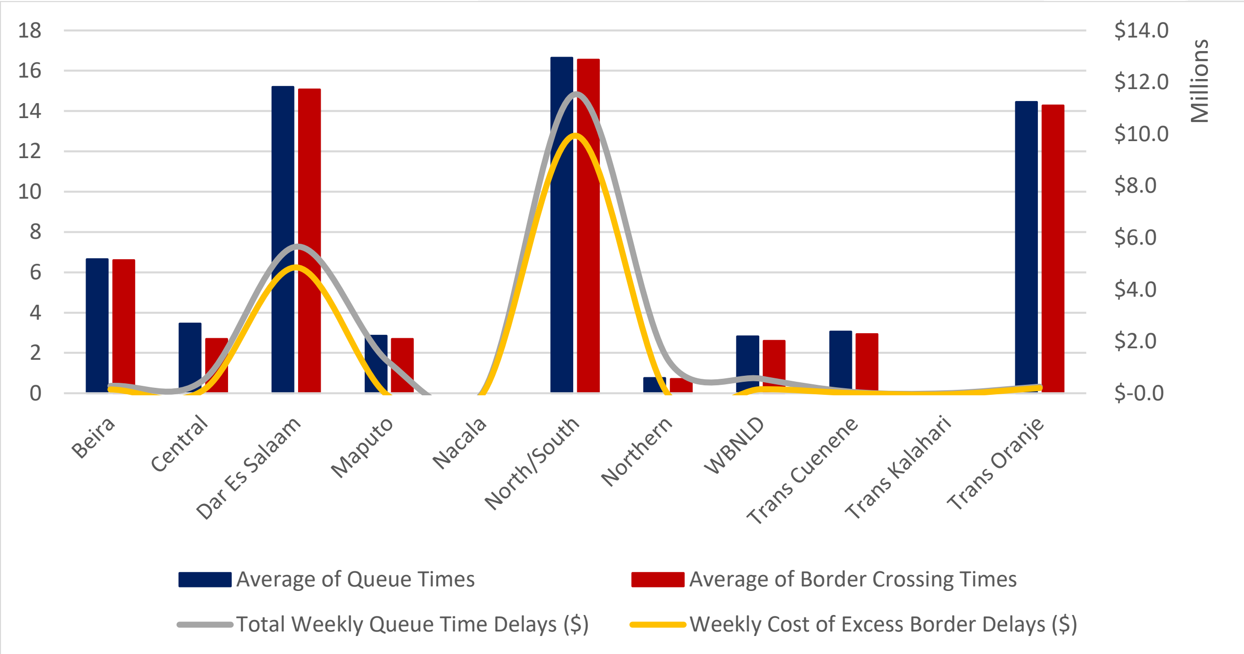
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from *TransAfricaBorder* & Crickmay *week ending 09/08/2026.*

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 09/08/2026.*

In summary, cross-border queue time averaged **~6.9 hours** (up by **~0.3 hours** from the previous week's **~6.6 hours**), indirectly costing the transport industry an estimated **$21.3 million** (**R344 million**). Furthermore, the week's average cross-border transit times hovered around **~6.7 hours** (up by **~0.3 hours** from the **~6.5 hours** recorded in the previous report), at an indirect cost to the transport industry of **$15.1 million** (**R245 million**). The total indirect cost for the week amounts to an estimated **~$36.4 million** (**R589 million**, up by **↑5%** from the **~R562 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

i. Global container port congestion and liner capacity

Global port congestion remains a material constraint on liner shipping, with *Sea-Intelligence* estimating that persistent delays are effectively removing around **1.7 million TEUs of capacity** from the market (which is still less than the market-wide figure of **4.18 million** quoted by *Linerlytica*); capacity absorption reached about **5% in June**, versus a pre-pandemic baseline of **2.2%**.[12] While Durban's **queue-to-berth ratio of 1.00** is elevated,[13] conditions are considerably worse elsewhere: *Linerlytica* placed **Shanghai/Ningbo at 3.25** on 15 August following *Typhoon Dolphin* and severe vessel bunching. Congestion is also acute across parts of Africa, with *Kuehne+Nagel* reporting seven-day average vessel waiting times of **19 days at Conakry, 16.1 days at Beira, 6.8 days at Tema and 4.25 days at Durban**.[14] Extreme weather, high yard utilisation, landside constraints and increasingly concentrated megamax vessel calls continue to undermine schedule reliability globally.

Against this backdrop, **Maersk appears poised to embark on a renewed vessel-ordering programme**, after eight years of relatively constrained fleet expansion under its self-imposed capacity discipline. Since 2018, the carrier's annualised fleet growth has averaged just **2.0%**, compared with **11.7% among its key competitors**. During its second-quarter earnings call, Maersk indicated that it intends to "ensure that we have the capacity to grow", acknowledging that its existing fleet is approaching the limit of what it can deliver. Further investment in new tonnage therefore appears increasingly likely. The move comes as the global containership orderbook has already climbed to a **record 41.7% of the existing fleet**, with further ordering expected over the next six months as carriers continue to pursue market share:

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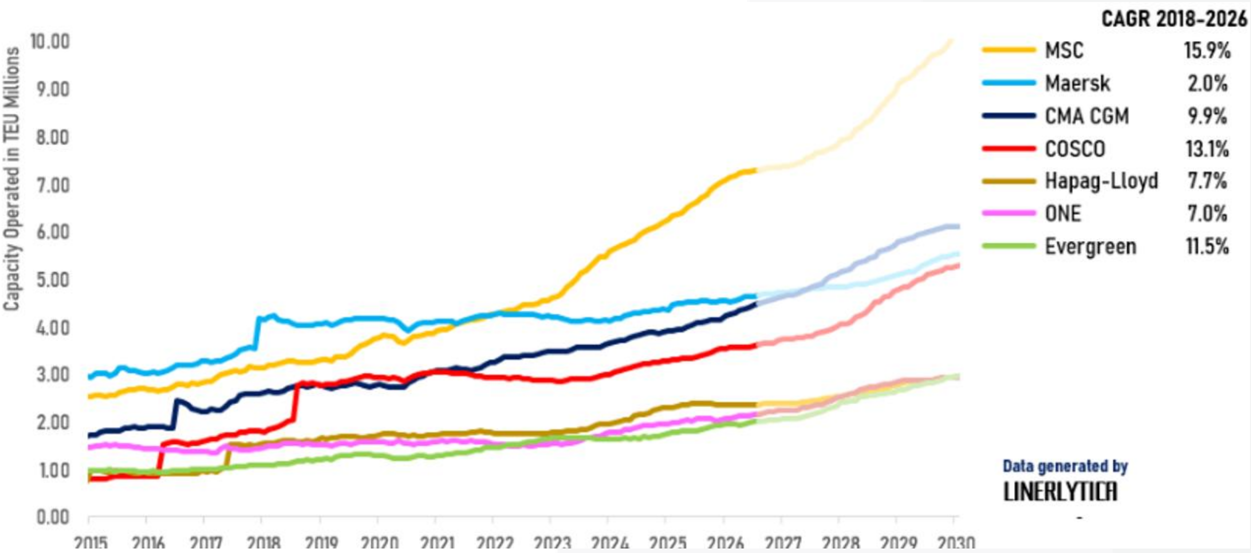
[12] Goldstone, C. 19/08/2026. Global port congestion keeping 1.7m teu of capacity out of the market.
[13] Linerlytica. 16/08/2026. Port Congestion.
[14] K+N. 18/08/2026. Port operational updates from around the world (12 - 18 August 2026).

Figure 15 – Top 7 carriers: Capacity operated 2015-2026 with projections to 2030

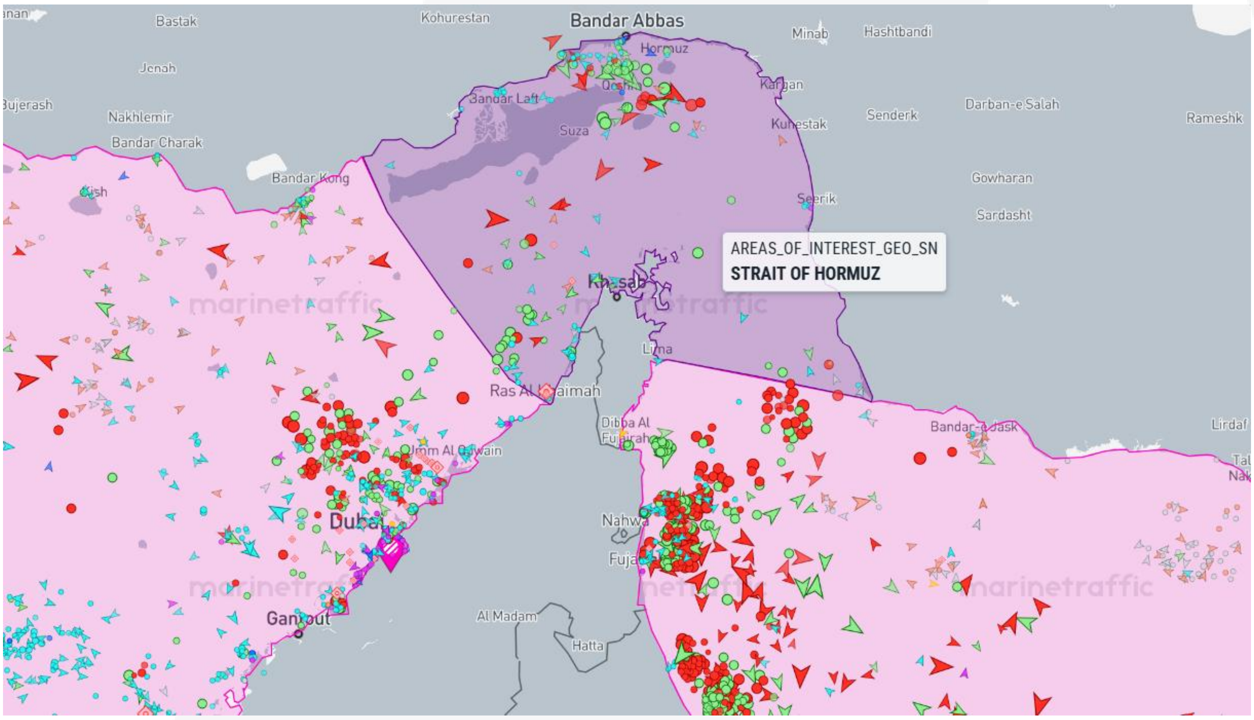


Source: Linerlytica

ii. Strait of Hormuz summary

Not much has changed over the last few weeks: The **Strait of Hormuz remains effectively constrained**, despite a modest recovery in vessel movements. *Kpler* data recorded only nine commodity-vessel transits on Wednesday, still dramatically below normal levels, as shipowners remain reluctant to return amid attacks and conflicting US-Iranian claims over whether the waterway is open. The number of vessels bunching below shows the current status (dots – the overwhelming majority – are anchored; arrows are moving):

Figure 16 – The Strait of Hormuz: Current view:



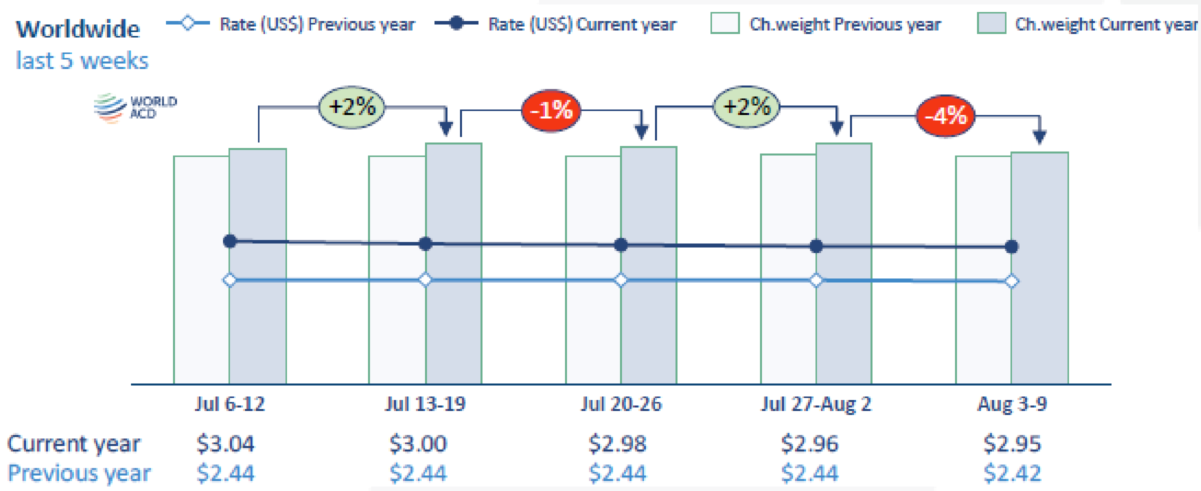
Source: Marine Traffic

Diplomatic prospects have also deteriorated, with President Trump stating that no talks with Iran are currently underway or scheduled. At the same time, Tehran maintains that Hormuz will remain closed until its conditions are met. Consequently, **Brent has risen towards $92/bbl**, while major Chinese tanker operators are increasingly restructuring supply chains around the disruption through alternative loading points and ship-to-ship transfers outside the Gulf. For container shipping, continued restrictions compound Middle Eastern network disruption, increasing **rerouting, insurance, bunker and schedule-reliability risks**, particularly for Gulf services and cargo transshipped through regional hubs.

b. Global air cargo industry

The latest weekly data from WorldACD shows that global air cargo markets softened in Week 32 (3–9 August), with worldwide chargeable weight falling **↓4%** (w/w) after the previous week's rebound. However, volumes remained **↑1%** above a year earlier. Declines were recorded across all origin regions, led by the Middle East and South Asia (**↓6%**), Europe and North America (**↓4%** each), and Asia Pacific (**↓3%**). Asian exports were additionally disrupted by *Typhoon Dolphin* and weaker China flows, while traffic from MESA to Europe fell sharply. Capacity remained broadly stable, slipping **↓1%** (w/w).

Figure 17 – Chargeable weight and rates (past five weeks)



Source: WorldACD

Global rates eased marginally from **$2.96/kg to $2.95/kg**, but remained **↑22% above last year**, indicating continued pricing resilience despite softer demand.

ENDS[15]

[15] ***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.*