

Cargo Movement Update #296¹

Date: 23 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)	39,469	44,966	84,435	36,518	46,953	83,471	↑1%
Air Cargo (tons)	3,925	2,914	6,839	4,209	2,508	6,717	↑2%

Monthly Snapshot

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

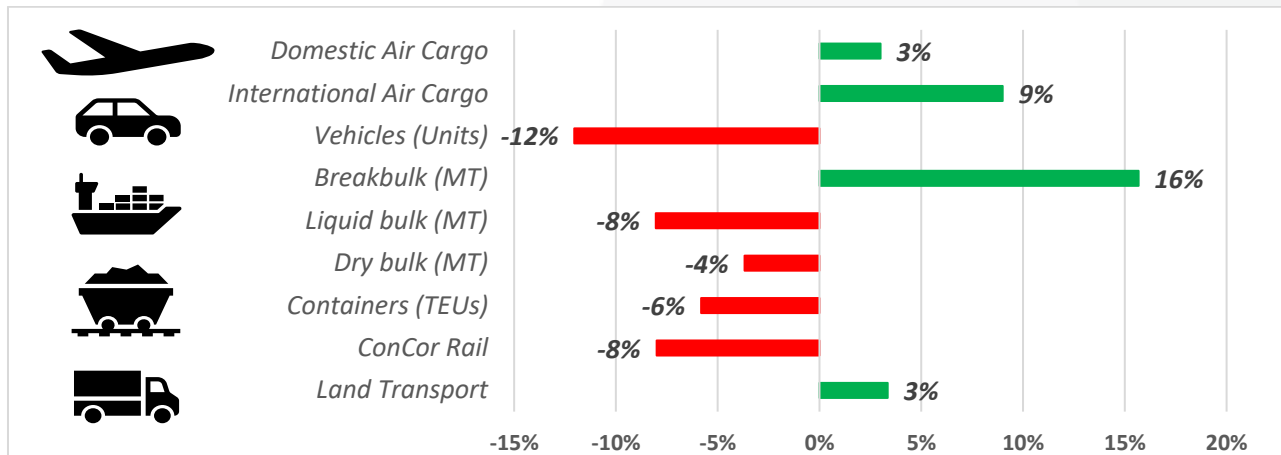
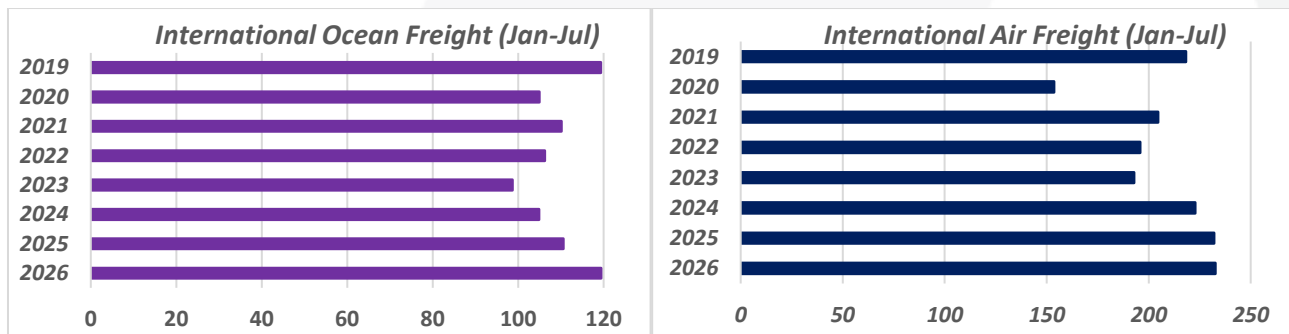


Figure 2 – Year-to-date flows 2019-2026⁵: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **12,062 TEUs** was handled per day, with **11,924 TEUs** projected for next week.
- **DGT latest:** Stack occupancy: **89.2% → 73.8%** (d/d); Road imports on hand: **6,171 → 5,750**.
- Rail cargo handled out of Durban was reported at **781** containers, down by **↓64%** from last week.
- Cross-border queue: **↓0.1 hrs**; transit: **no change**; SA borders: **~9.6 hrs (↑6%)**; SADC: **~6.4 hrs (no change)**.
- Global **port congestion has reached a new high**, with more than **4.3 million TEUs** waiting to berth.
- Global air cargo fell another **↓5%** (w/w), following the **↓2%** decline last week; but remains up **↑3%**(y/y).

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 296th 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 **12,062 TEUs** was handled daily, an increase from **11,924 TEUs** the previous week.

Port operations in Durban remained under considerable pressure, particularly at DGT, where vessel delays remained elevated, and some vessels spent more than 10 days at anchorage. The terminal has deliberately prioritised landside evacuation and yard fluidity during the recovery process, which has constrained waterside productivity in the short term. Encouragingly, more recent indicators suggest that conditions are beginning to improve, with overall stack occupancy declining from **89.2% to 73.8%** between 25 and 27 August, although reefer capacity remains heavily constrained. The wider disruption continues to affect vessel schedules, with Maersk confirming three vessels being rerouted, while the ConCor rail shutdown from 25 August to 3 September will add further landside pressure. Pier 1 performed strongly despite limited crane availability and continues to assist the wider Durban recovery effort. Elsewhere, container operations were generally positive: CTCT remained comfortably above target despite weather and systems delays, while both Ngqura and Port Elizabeth exceeded target, with Port Elizabeth continuing its recent strong performance.

Global container shipping remained under significant pressure this week, with **port congestion reaching a new high of more than 4.3 million TEUs waiting to berth**, exceeding the previous absolute peak recorded in 2022, although the affected share of the global fleet remains lower at **12.6%**. Weather-related disruption across East Asia remains the principal driver, while congestion is also building at the Panama Canal ahead of planned capacity reductions in September. At the same time, selected carriers continued a cautious return to the **Suez–Red Sea corridor**, with Maersk recording 11 transits and CMA CGM 15 last week, although most major Asian carriers continue to avoid the route. Global port rankings also shifted materially in H1 2026, with Jebel Ali falling from 10th to 32nd after volumes more than halved, while several major Asian ports continued to record strong growth.

International inbound air cargo to ORTIA dropped significantly this week – but was offset by a substantial increase in outbound cargo. The daily average amounted to **~561,000 kg** inbound (**↓7%**, w/w) and **~416,000 kg** outbound (**↑16%**). Current volumes to and from ORTIA remain slightly above the commensurate volumes of August last year (**↑4%**) – and approximately similar to the pre-pandemic August of 2019 (**↓0.5%**).

Despite sufficient stocks for now, **South Africa faces a potential jet-fuel shortage following Natref refinery disruptions and constrained international supply, prompting airlines and authorities to implement contingency measures.**

Global air cargo demand weakened further in week 33, with chargeable weight falling **↓5%** (w/w), although volumes remained **3% above last year**. Rates nevertheless held broadly steady at **\$2.97**, supported by reduced capacity and higher fuel costs, while Asia-Pacific traffic continued to show a pronounced divergence between resilient US-bound demand and weakening European flows.

On the N4 corridor, movements decreased considerably – by around **270 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 **1,260 HGVs per day** (**↓20%**, w/w). Overall, queue times **decreased slightly** to an average of **~4.2 hours** (**↓5%**) at the border. The average processing times **increased slightly** to an average of **~4.3 hours** (**↑2%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time decreased by around **10 Minutes** from last week, as transit times **were mostly stable**. The median border crossing times

at South African borders increased by **half an hour**, averaging **~9.6 hrs (↑6%)** for the week. In contrast, the greater SADC region (excluding South African-controlled borders) was broadly stable, averaging **~6.4 hrs (no change)**. This week, on average, **four** SADC borders again took a day or more to cross, namely Beitbridge, Chirundu OSBP, Kasumbalesa (the worst affected, taking around **two and a half days** to cross from the **Zambian side**), and Namanga OSBP.

Other developments of note include **(1)** the commencement of operations at Zambia's new Kabwe toll gate, introducing an additional K820 single-trip charge for trucks, **(2)** a temporary road disruption near Louis Trichardt after a truck lost part of its steel-coil load, and **(3)** a short-lived customs/documentation dispute at Kazungula, which was resolved following intervention.

In closing, the current DGT disruption should increasingly be viewed not only as an operational recovery exercise, but as an early test of the **long-term credibility and sustainability of the terminal's new operating model**. Encouragingly, recent indicators suggest that yard conditions are beginning to improve, supported by intervention across DGT, Transnet, shipping lines and the wider logistics community. The more important question, however, is whether this recovery translates into a structurally more resilient terminal. That will require sustained investment in equipment and maintenance, transparent operational data, clearer escalation protocols and stronger coordination across waterside, yard, road and rail interfaces. For the entire port system, the objective is therefore to move beyond episodic crisis management towards a **shared early-warning and system-fluidity framework** capable of identifying emerging constraints before they become economy-wide disruptions.

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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 17 to 23 August (measured in TEUs)

7-day flow reported (17/08/2026 – 23/08/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Gateway Terminal (Old Pier 2)	3,737	26,162	↑1%
New Pier (Pier 1)	2,367	16,570	↑16%
Cape Town Container Terminal	2,156	15,095	↓1%
Ngqura Container Terminal	2,277	15,940	↓5%
Port Elizabeth Container Terminal	726	5,080	↑11%
Other	798	5,588	↓18%
Total	12,062	84,435	↑1%

Source: Calculated from TPT, 2026. Updated 23/08/2026.

An average of ~12,062 TEUs (↑1%) was handled per day for the last week (17 to 23 August, Table 2). Consequently, throughput was below the projected average of ~12,943 TEUs (↓7% actual versus projected). For the coming week, an increased average of ~12,698 TEUs (↑5%) is predicted to be handled (17 to 23 August, Table 3).

Table 3 – Container Ports – Weekly flow projected for 24 to 30 August (measured in TEUs)

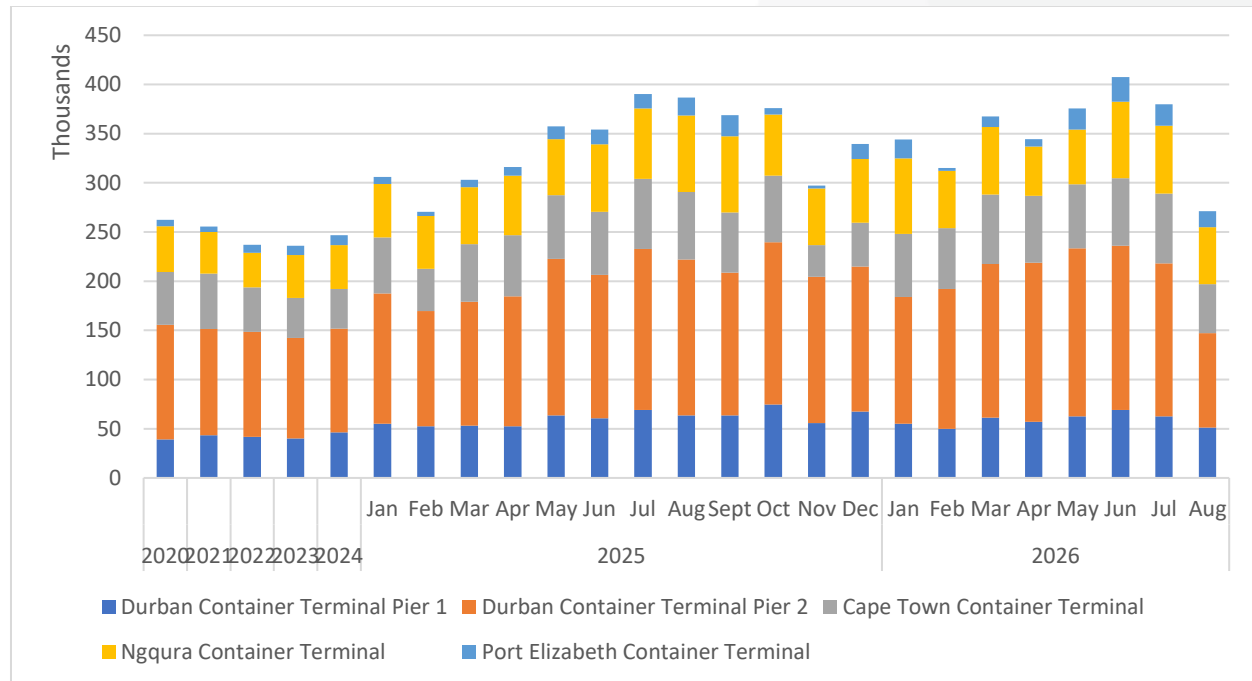
7-day flow projected (24/08/2026 – 30/08/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Gateway Terminal (Old Pier 2) ⁶	5,571	39,000	↑49%
New Pier (Pier 1)	2,011	14,074	↓15%
Cape Town Container Terminal	2,009	14,065	↓7%
Ngqura Container Terminal	1,890	13,232	↓17%
Port Elizabeth Container Terminal	375	2,625	↓48%
Other	842	5,893	↑5%
Total	12,698	88,889	↑5%

Source: Calculated from TPT, 2026. Updated 23/08/2026.

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 23/08/2026.

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:

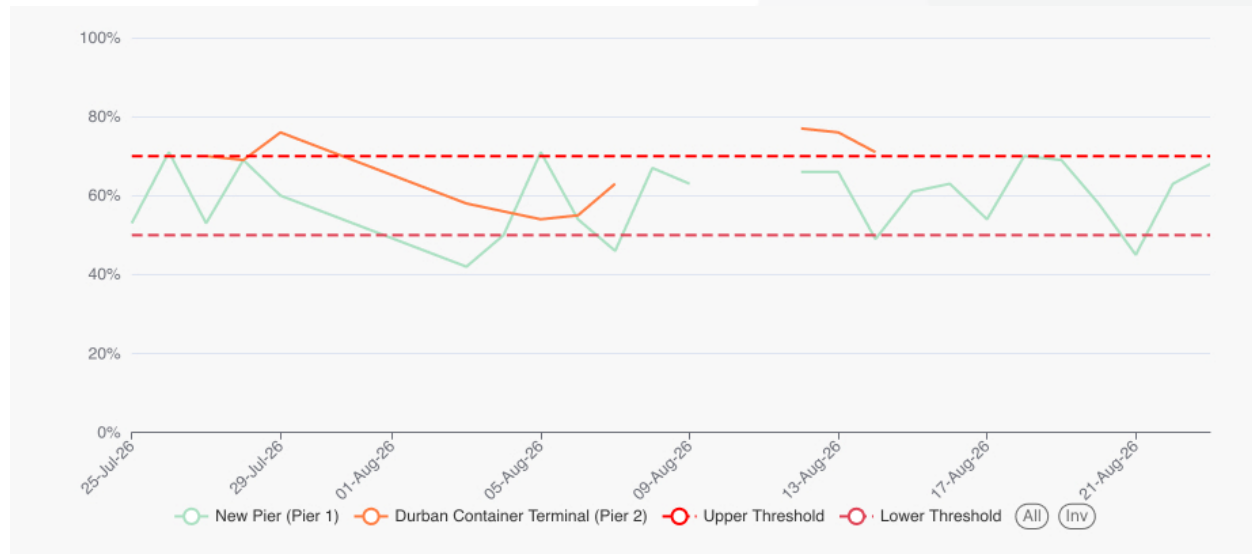
Table 4 – Vessel Dwell Time

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 26/08/2026.

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

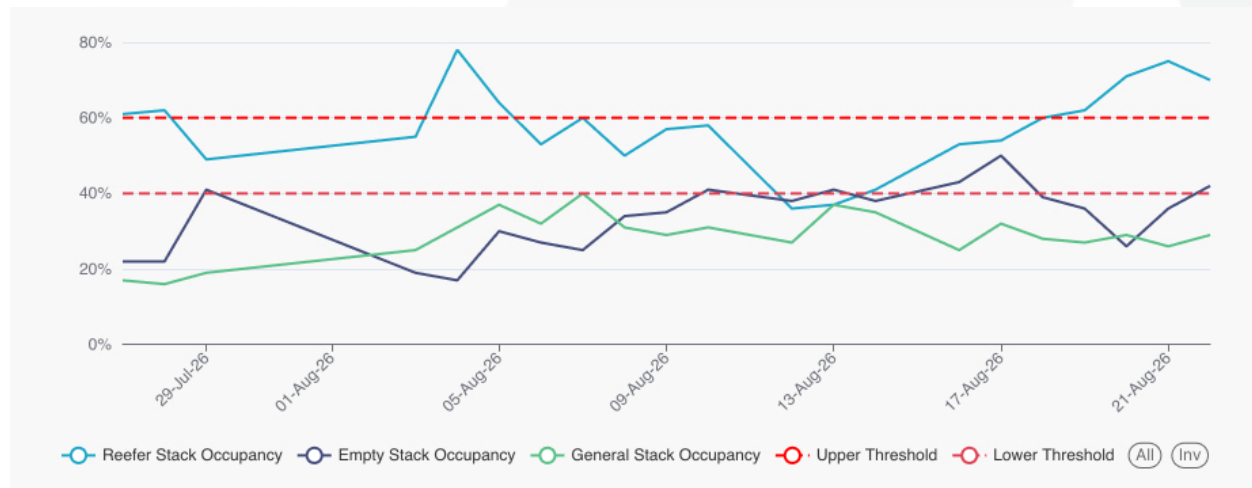
Figure 4 – Stack occupancy in Durban, general-purpose containers (25 July to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 23/08/2026.

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 (25 July to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 23/08/2026.

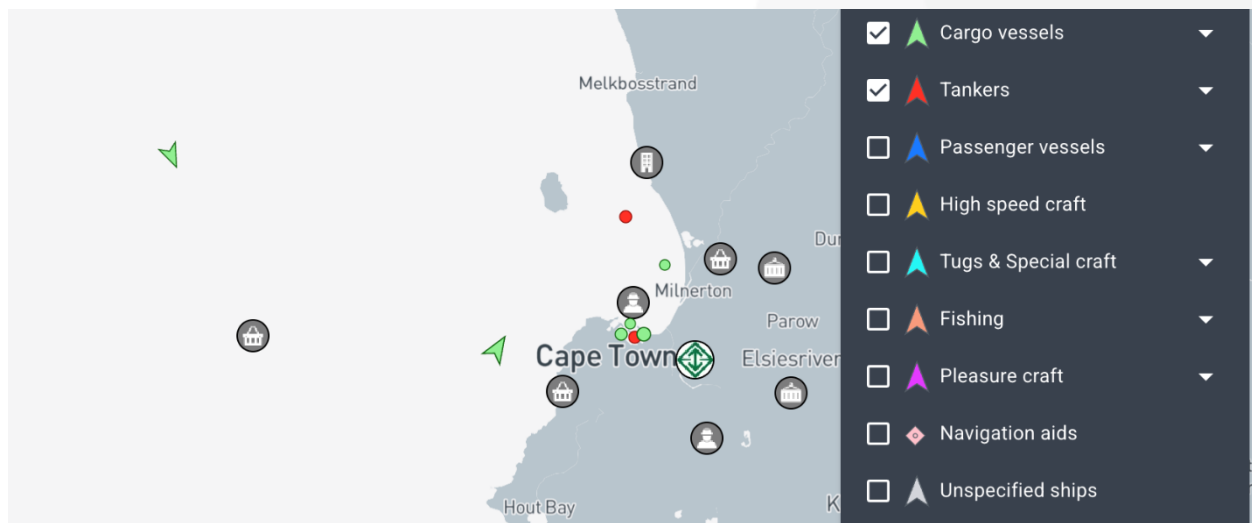
b. Summary of port operations

i. Cape Town

Cape Town Container Terminal reported a stable week, with a minor (1%) decrease in waterside volumes, though volumes achieved were 13% above the target volumes. Vessel turnaround times increased (from near zero) to 29 hours at anchorage, while time at berth remained steady at 39 hours. The strong performance was supported by consistent equipment availability, with an average of eight out of nine cranes and 30 out of 32 RTGs available across the week. This strong week came in spite of poor weather conditions early in the week.

Both Cape Town Multi-Purpose and AGL Terminals had no vessel calls or waterside volumes reported for the week.

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



Source: Marine Traffic. Updated 23/08/2026 at 14:00.

ii. Durban

Pier 1 reported an increase in waterside volumes, reaching volumes 12% above the planned volume, a notable recovery from the previous week, with the potential for a further increase in the coming week, as Pier 1 can alleviate some of the congestion at DGT. As congestion continues at the port of Durban, the terminal reported a significant increase in time spent at anchorage from 39 hours the previous week, though time at berth has gone down to 49 hours, as Pier 1 continues to work towards clearing congestion. The **TTT** for the week averaged **~47 minutes (↓2%, w/w)**, and the average **staging time was ~38 minutes (↑41%)**.

Durban Gateway Terminal experienced significant challenges throughout the week. Vessel delays remained elevated during the week, with average anchorage and berth times of approximately 115 and 116 hours respectively. By Wednesday morning, 10 vessels were waiting at anchorage for an average of approximately 160 hours.

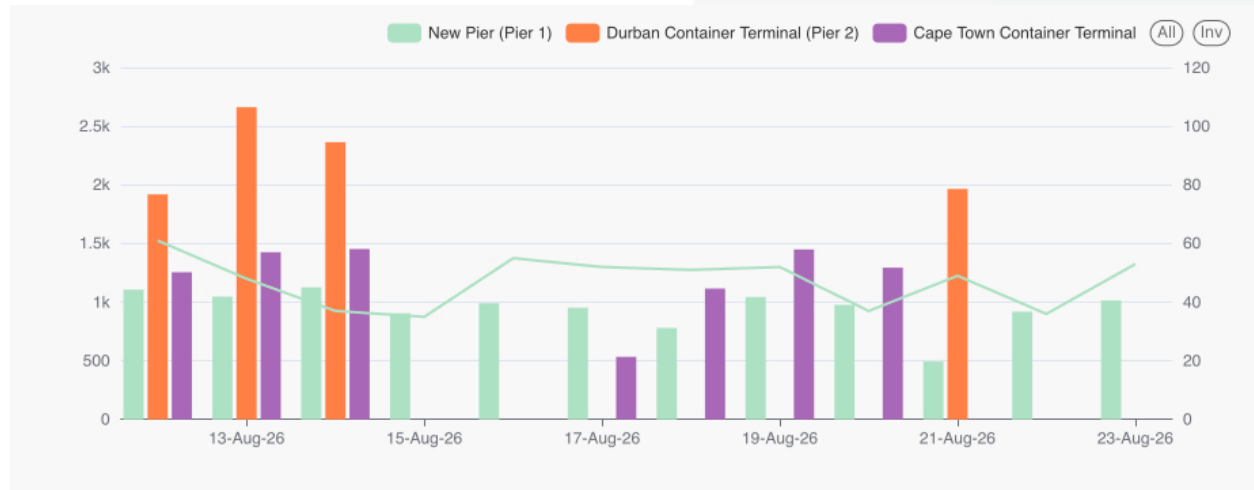
Encouragingly, **DGT is showing tangible signs of recovery**, following the severe operational disruption experienced over recent weeks. DGT reports that the NAVIS N4 system is stable, while the immediate focus has shifted to clearing the accumulated backlog, improving equipment availability and restoring fluidity between waterside operations, the yard and landside evacuation. Importantly, **all relevant parties are now actively engaged in the recovery effort**: DGT is working through its internal operational structures, Transnet is assisting across the wider Durban port system and rail interface, while shipping lines are adjusting vessel schedules, rotations and cargo flows to create additional operating space. SAAFF continues to work closely with members and stakeholders to provide empirical operational information and support coordinated intervention.

The latest data provide some grounds for cautious optimism. **Overall stack occupancy declined from 89.2% on 25 August to 73.8% on 27 August**, a substantial improvement in yard density, while road-import containers on hand fell from **6,171 to 5,750** over the same period. In the latest 24-hour reporting period, DGT completed **1,811 gate moves**, including **1,405 import movements**, reflecting the deliberate emphasis on evacuating imports and creating capacity within the terminal. Four vessels were working alongside on Thursday morning, although **nine vessels remained at anchorage**. The principal pressure point remains the

reefer operation, where stack occupancy was still elevated at **110%**, highlighting that recovery remains uneven, and that continued discipline will be required before the terminal returns to sustainable fluidity.

Similar to Pier 1, Durban Multi-Purpose Terminal reported an increase in waterside volumes, achieving 14% more than their target volumes. Vessels spent an average of 51 hours at anchorage and 150 hours at berth.

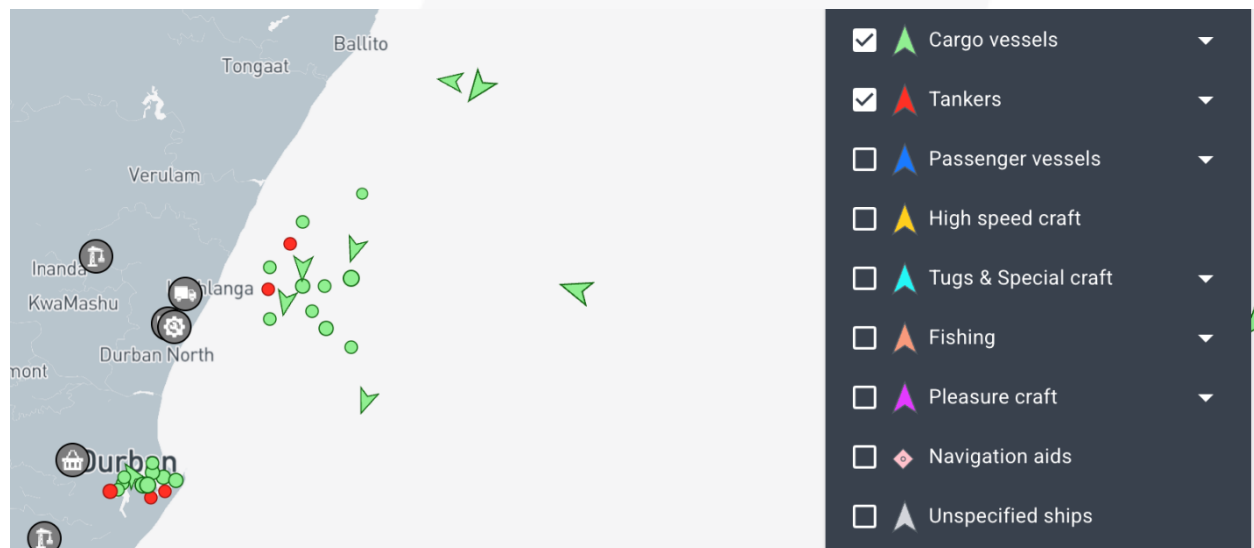
Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 23/08/2026.

The queue of container vessels waiting outside Durban **was consistent** this week. On Wednesday morning (26 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 (**seven**), liquid (**four**), and breakbulk (**one**) vessels **was stable** from last week:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 23/08/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal had a minor decline in volumes, meeting its target. Vessels spent an average of 21 hours at anchorage and 31 hours at berth. The terminal reported equipment availability at seven out of eight cranes and 23 out of 30 cranes throughout the week.

Similarly, Port Elizabeth Container Terminal reported an increase in volumes, well overreaching their targets (71% over). Further supporting the strong performance, vessel turnaround times reduced, with an average time at anchorage of 14 hours, and 26 hours at berth. The terminal operated with a strong complement of equipment on both the water and landside.

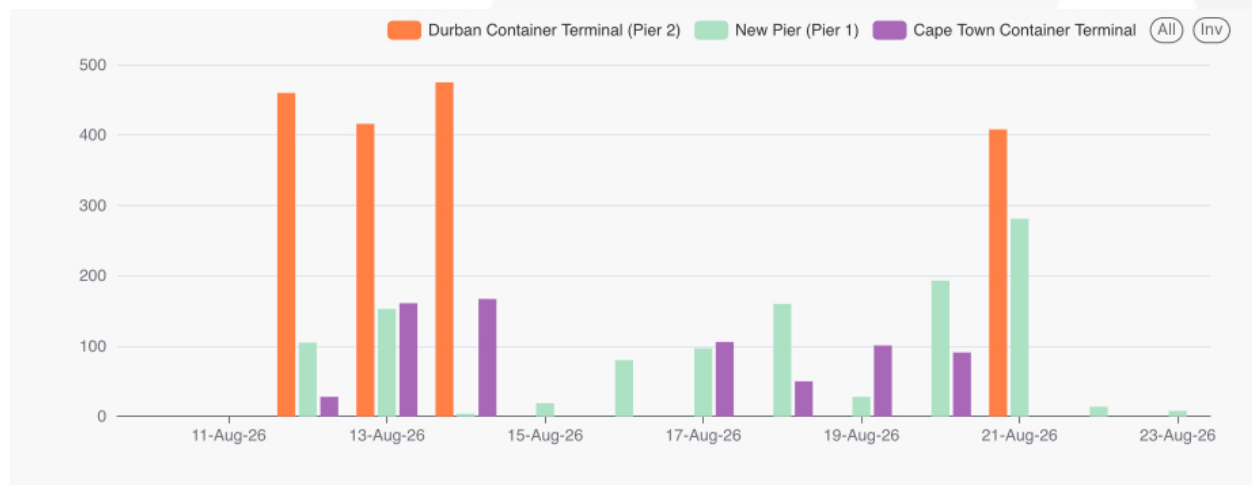
iv. Richards Bay

At RBCT, the daily average coal throughput for the week **increased considerably, nearly double from last week** and averaged close to **195,000 tons (↑95%, w/w)** a day. With an average of **17 trains per day** being serviced, below the target of 22.

v. Transnet Freight Rail (TFR)

In the last week (17 to 23 August), rail cargo on the ConCor line out of Durban was reported at **781** containers, down by **↑64%** from the previous week's **2,161** containers. This significant increase is mostly attributed to DGT not sharing volume data for the reporting period. Pier 1's week-on-week performance showed an 11% increase. A decline in volumes for the coming weeks is anticipated as the ConCor line shuts

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



Source: Calculated using data from Transnet, 2025. Updated 23/08/2026.

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 (17 to 23 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

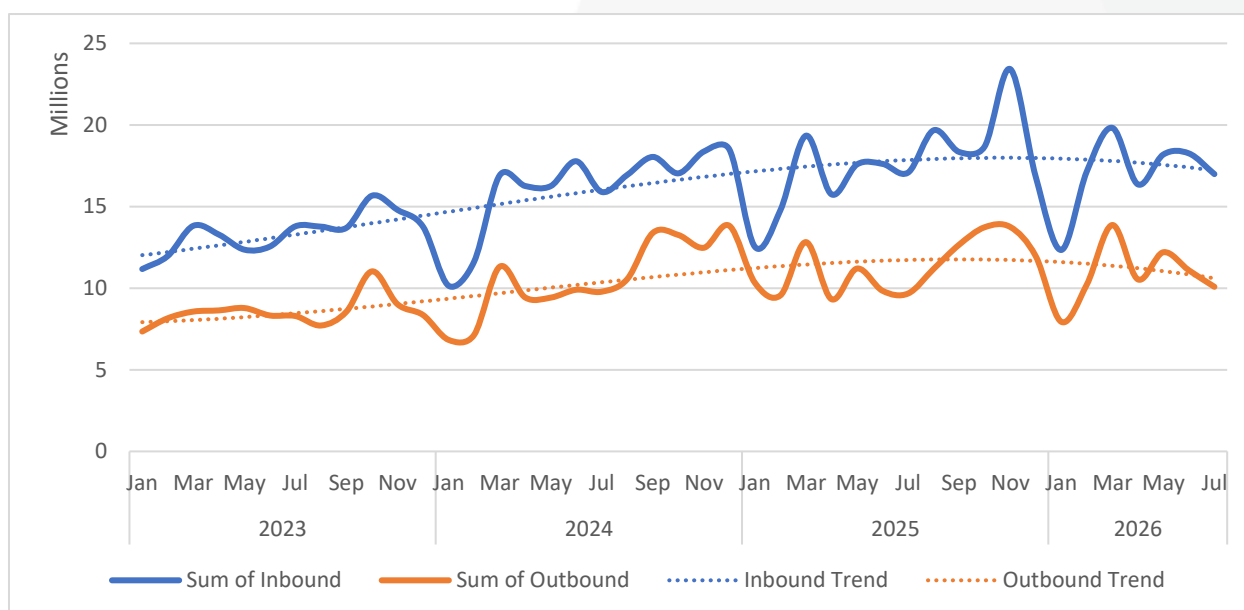
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	560,778	3,925,444	↓7%
Volume outbound	416,246	2,913,719	↑16%
Total	977,023	6,839,163	↑2%

Courtesy of ACOC. Updated: 23/08/2026.

International inbound air cargo to ORTIA dropped significantly this week – but was offset by a substantial increase in outbound cargo. The daily average amounted to ~**561,000 kg** inbound (↓7%, w/w) and ~**416,000 kg** outbound (↑16%). Current volumes to and from ORTIA remain slightly above the commensurate volumes of August last year (↑4%) – and approximately similar to the pre-pandemic August of 2019 (↓0.5%).

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: 23/08/2026.

The latest reported fuel stock days (as of Thursday morning, 27 August) per airport indicate:

- ORTIA: **6.3 days** (target: 5 days)
- CTIA: **4.3 days** (target: 4 days)
- Durban: **12.4 days** (target: 5 days)

Despite the current stock being sufficient for now, **there is a jet fuel shortage risk emerging across South African airports**, following planned maintenance and a subsequent technical problem at Sasol's Natref refinery.⁷ Airlines are implementing contingency measures, with FlySafair securing additional fuel from alternative suppliers and using *tankering* to reduce refuelling requirements at destination airports. The Department of Energy has convened an emergency meeting with ACSA and the Fuels Industry Association

⁷ Bloomberg. 26/08/2026. [Jet fuel shortage on the cards for SA airports.](#)

of Southern Africa. At the same time, broader jet-fuel supply has already been constrained by disruptions to flows through the Strait of Hormuz.

3. Road and Regional Update

a. Lebombo border post update

In the last week (17 to 23 August), movements decreased considerably – by around **270 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 **1,260 HGVs per day (↓20%, w/w)**.
- Overall, queue times **decreased slightly** to an average of **~4.2 hours (↓5%)** at the border.
- The average processing times **increased slightly** to an average of **~4.3 hours (↑2%)** per crossing.

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

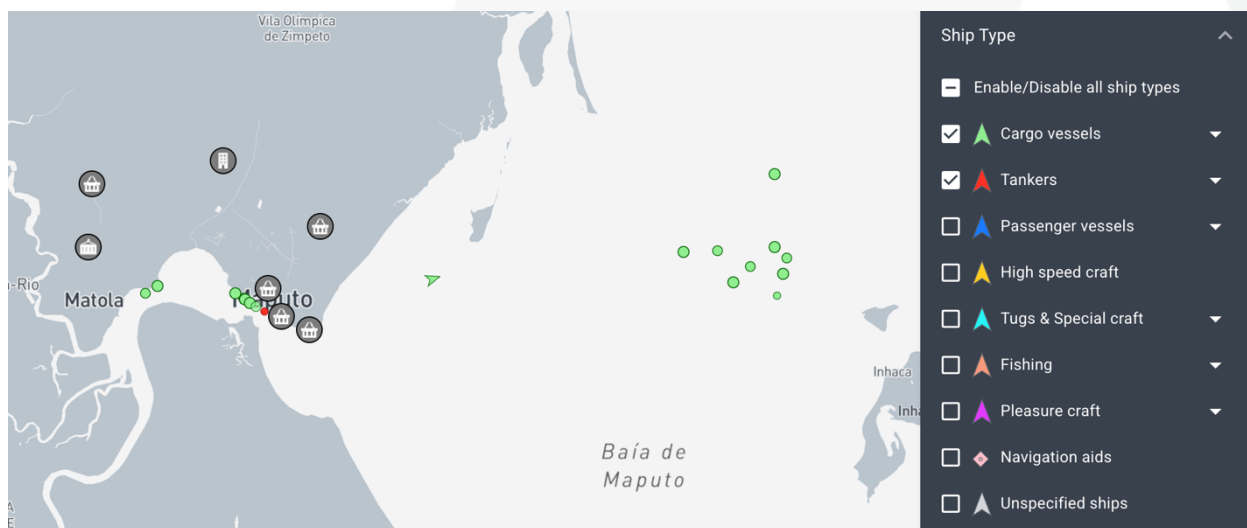
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,260	1,257	932	188	43	61	32	230
% (w/w)	-22%	-20%	-33%	15%	43%	-15%	3%	-1%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 23/08/2026.

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 23/08/2026 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 **10 Minutes** from last week, as transit times **were mostly stable**.

- The median border crossing times at South African borders increased by **half an hour**, averaging **~9.6 hrs (↑6%)** for the week.
 - In contrast, the greater SADC region (excluding South African-controlled borders) was broadly stable, averaging **~6.4 hrs (no change)**.
1. **Zambia – new Kabwe toll gate:**
 - a. A new toll gate at Kabwe became operational on 22 August, with heavy vehicles reportedly charged K820 per single trip.
 - b. The toll is payable each time the route is used, adding a further cost consideration for operators using the corridor.
 2. **N1 corridor – truck incident near Louis Trichardt:**
 - a. On 16 August, a truck transporting steel coils lost part of its load near Louis Trichardt en route to Musina, temporarily affecting the corridor.
 - b. The obstruction was cleared later the same day.
 3. **Kazungula – customs/documentation intervention:**
 - a. On Sunday, three drivers were temporarily stopped at Kazungula after officials questioned their documentation and duties already paid and sought to impose an additional penalty.
 - b. The matter was resolved following intervention, with the drivers released approximately one hour later.

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	543	24.6	5.3	25.0	16,290	3,801
Beitbridge	Zimbabwe-SA	553	4.8	1.3	4.5	16,590	3,871
Groblersbrug	SA-Botswana	233	15.4	1.2	15.2	6,990	1,631
Martin's Drift	Botswana-SA	172	3.4	0.4	3.2	5,160	1,204
Kopfontein	SA-Botswana	186	10.3	1.5	10.2	5,580	1,302
Tlokweng	Botswana-SA	50	0.8	0.2	0.5	1,500	350
Vioolsdrift	SA-Namibia	30	4.5	2.2	4.3	900	210
Noordoewer	Namibia-SA	20	1.8	0.4	1.5	600	140
Nakop	SA-Namibia	30	5.7	1.2	5.4	900	210
Ariamsvlei	Namibia-SA	20	1.1	0.3	1.1	600	140
Skilpadshek	SA-Botswana	288	9.0	2.5	9.0	8,640	2,016
Pioneer Gate	Botswana-SA	102	0.0	0.0	0.0	3,060	714
Ramatlabama	SA-Botswana	181	3.1	0.4	3.1	5,430	1,267
Ramatlabama	Botswana-SA	116	0.5	0.2	0.3	3,480	812
Lebombo	SA-Mozambique	1,560	4.5	2.0	4.3	46,800	10,920
Ressano Garcia	Mozambique-SA	1,543	1.5	0.2	1.3	46,290	10,801
Sum/Average		5,627	5.7	1.2	5.6	168,810	39,389

Source: Calculated from [TransAfricaBorder](#) & Crickmay, week ending 16/08/2026.

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.

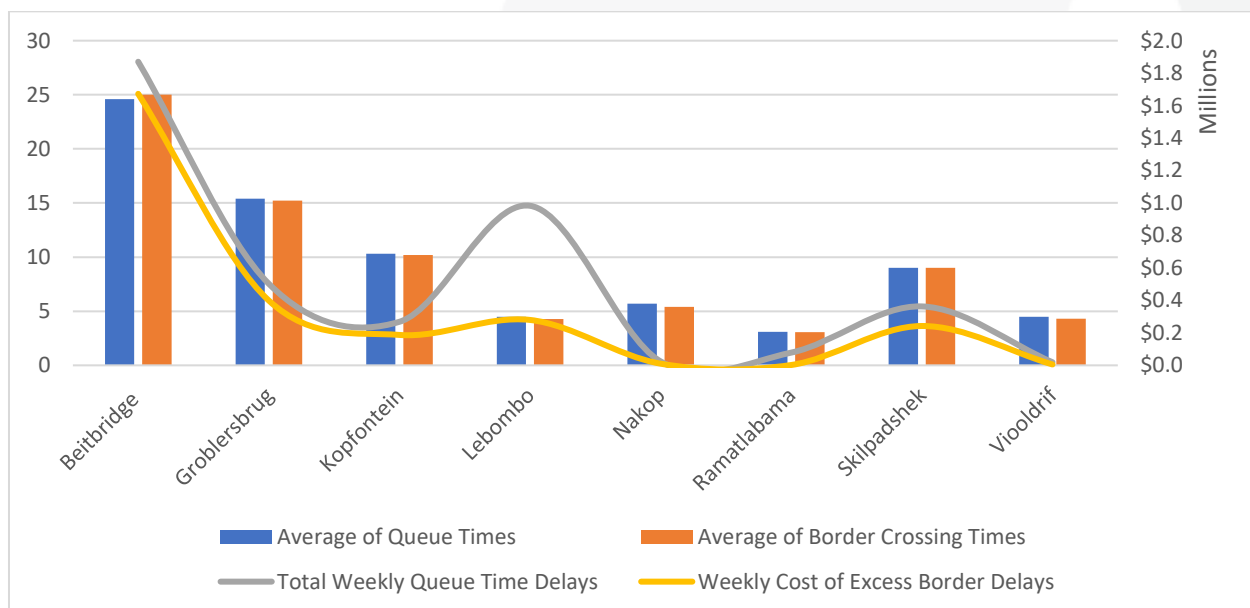
Table 8 – Delays summary – Corridor perspective

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	5.2	1.5	5.1	9,600	2,240
Central Corridor	798	6.6	1.0	6.6	23,940	5,586
Dar Es Salaam Corridor	1,819	14.6	4.3	14.3	54,570	12,733
Maputo Corridor	3,103	3.0	1.1	2.8	93,090	21,721
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,626	14.5	3.1	14.4	108,780	25,382
Northern Corridor	2,817	0.3	0.1	0.3	92,520	21,588
WBNLD Corridor	953	3.5	0.7	3.3	28,590	6,671
Trans Cunene Corridor	100	3.3	1.0	3.1	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	15.6	1.3	15.4	3,480	812
Sum/Average	13,879	6.8	1.5	6.7	424,380	99,022

Source: Calculated from TransAfricaBorder & Crickmay, week ending 16/08/2026.

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

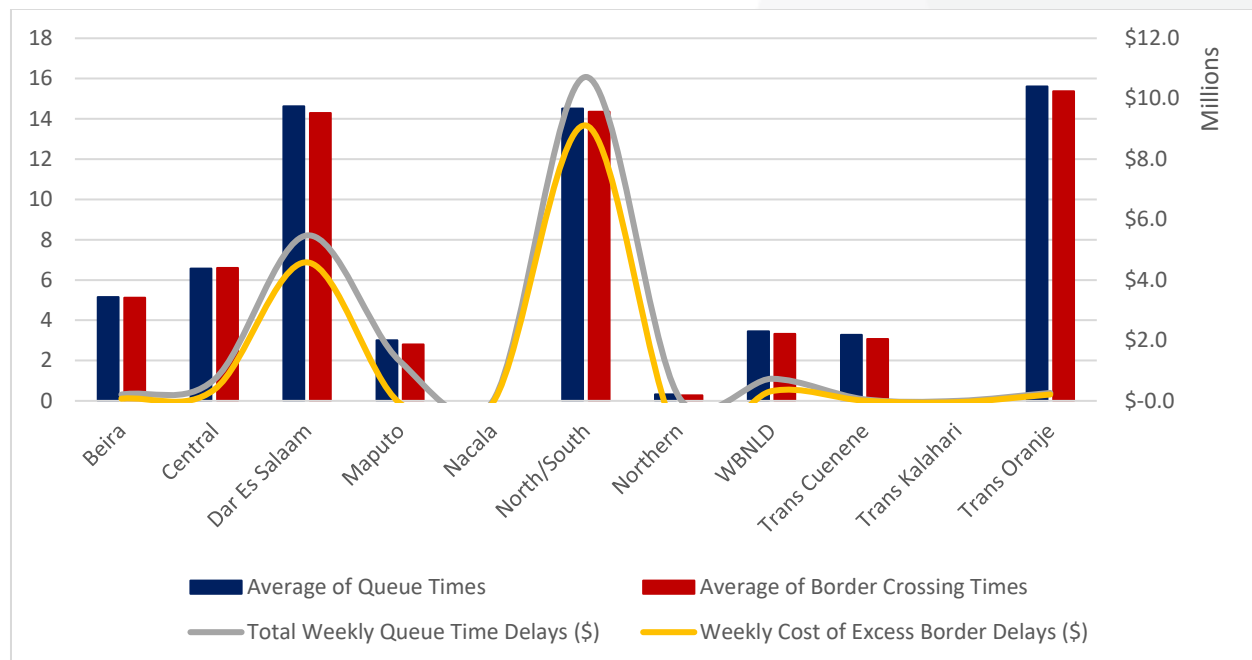
Figure 12 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 16/08/2026.

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 16/08/2026.

In summary, cross-border queue time averaged **~6.8 hours** (down by **~0.1 hours** from the previous week's **~6.9 hours**), indirectly costing the transport industry an estimated **\$19.6 million (R314 million)**. Furthermore, the week's average cross-border transit times hovered around **~6.7 hours** (no change from the **~6.7 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$13.3 million (R214 million)**. The total indirect cost for the week amounts to an estimated **~\$32.9 million (R526 million)**, down by **↓10%** from the **~R589 million** in the previous report).

4. International Update

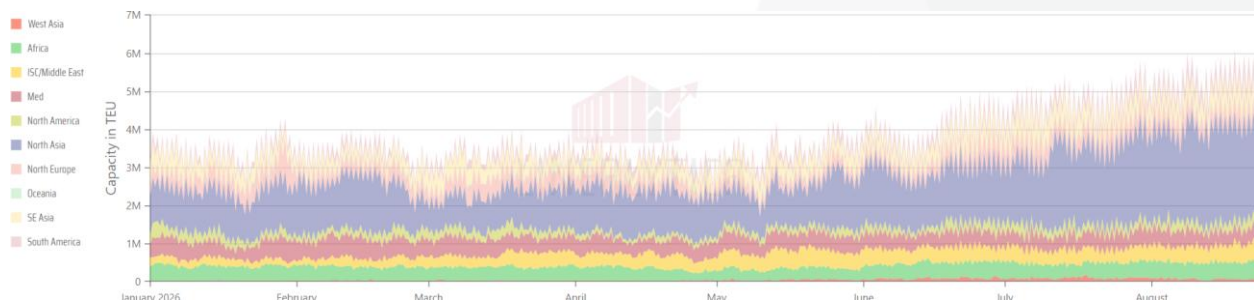
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Global container port congestion

Linerlytica this week reported that global **port congestion has reached a new high**, with more than **4.3 million TEUs** waiting to berth, driven largely by weather-related disruption across East Asia. This exceeds the previous absolute peak of **4.0 million TEUs during 2022**. However, the share of the global fleet affected is lower at **12.6%**, compared with **15.7%** during the pandemic peak, reflecting substantial fleet growth since then. Congestion is also beginning to build at the **Panama Canal**, where transit capacity is expected to be reduced further in September. However, delays for containerships with pre-booked slots remain limited. Port congestion remains a global phenomenon currently, as the:

Figure 14 – Port congestion per region

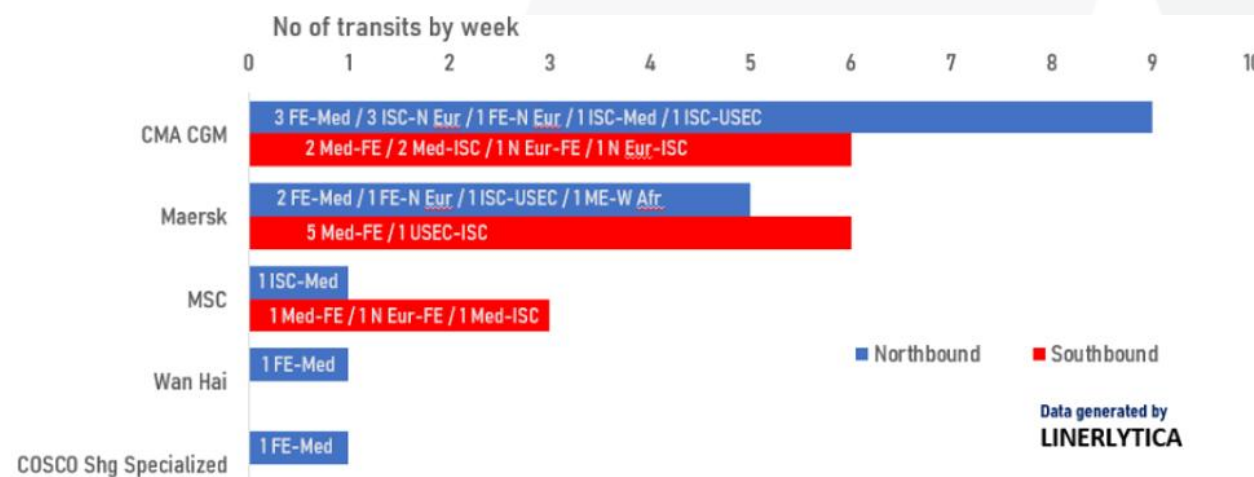


Source: Linerlytica

ii. Red Sea Transits

Maersk has further increased its use of the **Suez–Red Sea corridor**, joining CMA CGM in cautiously accelerating the return of containership traffic through the **Bab el-Mandeb**. Maersk recorded **11 north- and southbound transits last week**, compared with **15 by CMA CGM**. However, the return remains uneven across the major carriers. **Hapag-Lloyd**, Maersk’s Gemini Cooperation partner, has not routed any vessels through the Red Sea for the past three weeks, while most major Asian carriers continue to avoid the route.

Figure 15 – Suez-Bab el Mandeb vessel transit monitor (Top 12 carriers only) – 17-23 Aug:



Source: Linerlytica

MSC remains a notable exception, having resumed Suez transits at the end of July. The carrier continued using the corridor last week and completed its **first northbound Red Sea transit since 2024** on the revised *Himalaya Express* service linking India with the Mediterranean.

iii. Global port throughput: Top 30 ports

Global container port rankings shifted materially during the first half of 2026, reflecting the impact of Middle East disruption and changing trade patterns associated with US tariff policy. Renewed disruption in the Strait of Hormuz was particularly severe for Gulf hubs: **Jebel Ali’s Q2 throughput fell by more than 90% to just 374,000 TEUs**, leaving first-half volumes at **3.14 million TEUs**, less than half the **7.77 million** recorded a year earlier. Consequently, Jebel Ali fell from **10th to 32nd globally**, while Abu Dhabi’s Khalifa Port also dropped sharply following an estimated contraction of at least 50%.

Figure 16 – Top 30 global container port throughput: H1 2026

Rank mid 2026	Rank end 2025	Port	Country	1H 2026	1H 2025	Growth 1H 26/25	FY 2025	Growth FY 25/24
1	(1)	Shanghai	China	28,737,000	27,065,000	6.2%	55,062,000	6.9%
2	(3)	Ningbo-Zhoushan	China	22,900,000	21,050,000	8.8%	43,870,000	11.6%
3	(2)	Singapore	Singapore	22,741,690	21,715,439	4.7%	44,663,699	8.6%
4	(4)	Shenzhen	China	18,560,000	17,230,000	7.7%	35,410,000	6.0%
5	(5)	Qingdao	China	17,560,000	16,380,000	7.2%	32,890,000	6.5%
6	(6)	Guangzhou	China	14,030,000	13,640,000	2.9%	27,680,000	6.2%
7	(8)	Tianjin	China	13,000,000	12,247,800	6.1%	24,032,800	3.2%
8	(7)	Busan	Korea	12,601,217	12,690,125	-0.7%	24,882,356	2.0%
9	(9)	LA/LB	US	9,974,596	9,702,444	2.8%	20,120,917	0.9%
10	(11)	Port Kelang	Malaysia	7,700,000*	7,327,909	est.	15,138,772	3.4%
11	(13)	Tanjung Pelepas	Malaysia	7,000,000*	6,872,112	est.	14,028,376	14.5%
12	(12)	Rotterdam	Netherlands	7,021,000	7,026,000	-0.1%	14,244,954	3.1%
13	(14)	Antwerp-Bruges	Belgium	6,804,000	6,910,000	-1.5%	13,633,855	0.8%
14	(15)	Hong Kong	China	6,349,000	6,577,000	-3.5%	12,994,000	-5.1%
15	(16)	Xiamen	China	6,035,300	5,938,600	1.6%	12,507,700	2.1%
16	(17)	Tanger Med	Morocco	n.a.	n.a.	n.a.	11,106,164	8.4%
17	(18)	Laem Chabang	Thailand	5,368,800	5,109,838	5.1%	10,452,400	9.4%
18	(19)	Beibu Gulf	China	4,570,000	4,760,000	-4.0%	10,060,000	11.5%
19	(20)	Ho Chi Minh City	Vietnam	n.a.	n.a.	n.a.	8,922,800	5.3%
20	(26)	Colombo	Sri Lanka	4,444,034	3,972,053	11.9%	8,301,210	6.5%
21	(28)	Nhava Sheva	India	4,402,907	3,874,394	13.6%	7,944,257	12.6%
22	(21)	NY/NJ	US	4,427,159	4,417,282	0.2%	8,897,531	0
23	(27)	Jakarta	Indonesia	4,300,000	3,900,000	10.3%	8,300,000	6.4%
24	(22)	Kaohsiung	Taiwan	4,275,118	4,516,808	-5.4%	8,885,854	-3.7%
25	(25)	Haiphong	Vietnam	n.a.	n.a.	n.a.	8,323,000	16.4%
26	(24)	Mundra	India	4,100,000*	4,004,000	est.	8,358,300	1.6%
27	(23)	Hamburg	Germany	4,043,000	4,203,588	-3.8%	8,364,000	7.3%
28	(30)	Rizhao	China	3,955,000	3,660,000	8.1%	7,370,000	9.8%
29	(29)	Cai Mep	Vietnam	3,900,000	3,550,000	9.2%	7,605,200	7.4%
30	(31)	Lianyungang	China	3,400,000	3,390,000	0.3%	7,160,000	7.0%

*estimates, final result may change

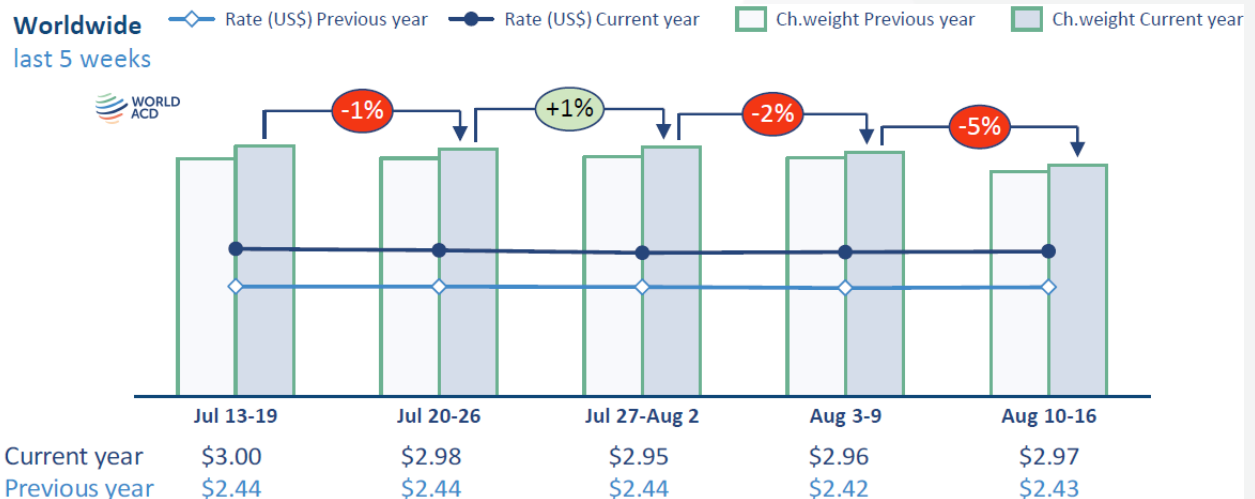
Source: [Alphaliner](https://www.alphaliner.com)

The H1 rankings on page 2 nevertheless show continued strength across much of Asia. **Shanghai retained first place with 28.7 million TEUs (↑6.2%, y/y)**, followed by Ningbo-Zhoushan (↑8.8%) and Singapore (↑4.7%). Strong gains were also recorded at **Nhava Sheva (↑13.6%)**, Colombo (↑11.9%), Jakarta (↑10.3%) and Cai Mep (↑9.2%), while several European and mature Asian gateways contracted, including Rotterdam (↓0.1%), Antwerp-Bruges (↓1.5%), Hong Kong (↓3.5%), Hamburg (↓3.8%) and Kaohsiung (↓5.4%).

b. Global air cargo industry

The latest weekly data from WorldACD shows that global air cargo demand softened further in week 33, with worldwide chargeable weight falling ↓5% week on week, following a ↓2% decline the previous week.

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



Source: WorldACD

Most origin regions contracted, led by **Europe** and **Asia Pacific** (↓6% each), while Central and South America was the only region to grow (↑2%). Despite the short-term slowdown, global tonnage remained **↑3% above the corresponding 2025 period**. Asia-Pacific flows continued to diverge sharply: volumes to the USA fell 4% week on week but remained **14% higher** year on year, whereas flows to Europe declined ↓5% week on week and **14% year on year**, reflecting weaker e-commerce traffic after the EU de minimis change. Average global rates nevertheless held broadly flat at **\$2.97**, supported by higher fuel costs and a further 1% weekly reduction in capacity.

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.