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Cargo Movement Update #297[1]

Date: 30 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)	37,881	43,158	**81,039**	39,469	44,966	**84,435**	↓4%
Air Cargo (tons)	3,788	2,848	**6,636**	3,925	2,914	**6,839**	↓3%

Monthly Snapshot

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

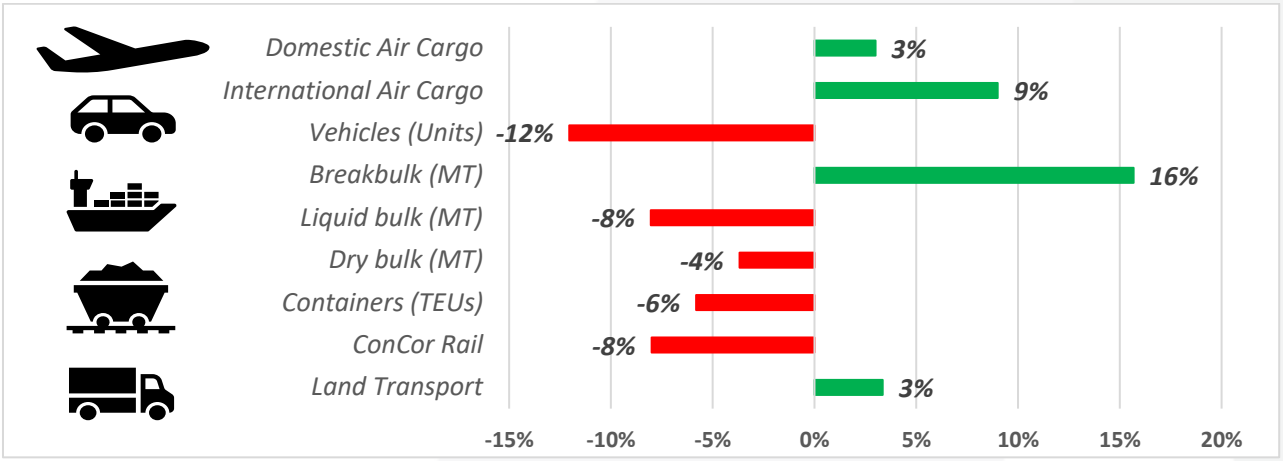
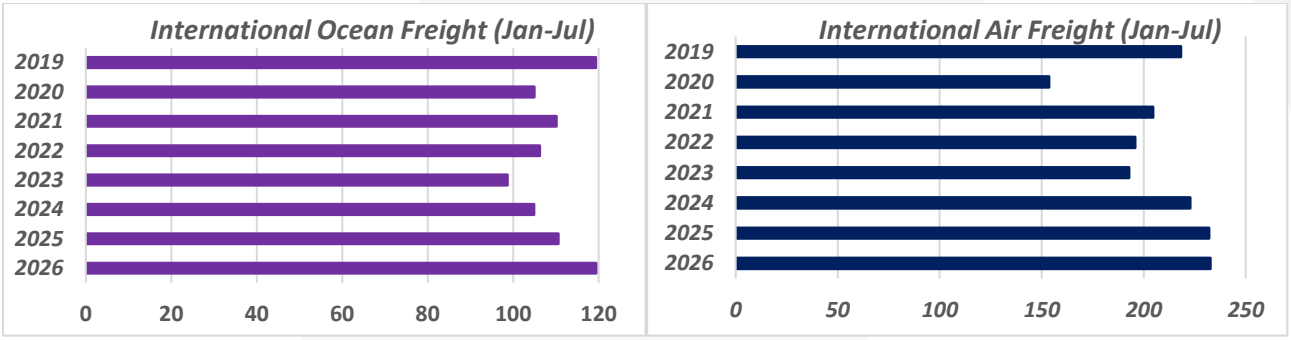


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **11,577 TEUs** was handled per day, with **12,513 TEUs** projected for next week.
- **DGT latest**: Stack occupancy: **69.1% to 63.8%** (d/d); Reefer stack occupancy: **85% to 62%**.
- Rail cargo handled out of Durban was reported at **1,514** containers, up by ↑94% from last week.
- Cross-border queue: **↑0.4 hrs**; transit: **↑0.3 hrs**; SA borders: **~7.5 hrs** (**↓21%**); SADC: **~7 hrs** (**↑9%**).
- Asian ports: significantly impacting **schedule reliability**; **↓6.1%** (m/m) – the steepest since January 2021.
- Global cargo strengthened modestly this week (**↑2%**, w/w & **↑5%**, y/y) – with rates unchanged at **$2.98/kg**.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *297th* 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 **11,577 TEUs** was handled daily, a decrease from **12,062 TEUs** the previous week.

Durban's congestion crisis deepened this week, with anchorage times reaching **up to 10 days**, with **9 vessels waiting in the queue**. Waterside volumes remained flat for DGT, while the other terminals showed a decline, as conditions worsened. Vessels were rerouted to the Eastern Cape, where both PECT and NCT showed improvements in waterside volumes, in spite of some weather delays. In the Western Cape, CTCT showed a slow down in operations, while MPT had a very quiet week. In contrast, the AGL terminal had a very strong week, working two vessels.

Global container shipping conditions deteriorated during the latest reporting period, with **renewed congestion across major Asian hubs materially affecting vessel schedules and effective capacity**. Approximately **3.92 million TEU, or 11.4% of the global fleet, remained tied up at anchorages**, while *Typhoon Saudel* caused severe disruption at Ningbo and Shanghai, with delays exceeding 10 days in the worst cases. Global schedule reliability consequently fell sharply to **56.4% in July**, down **↓6.1%** (m/m), while average delays for late vessels increased to **6.06 days**; Shanghai reliability dropped to only **21.0%**.

Geopolitical disruption also remains material. Carriers are cautiously increasing selective **Red Sea/Suez transits**, although Bab el-Mandeb traffic remains below normal levels, while **Strait of Hormuz flows remain heavily disrupted** amid restricted vessel movements and heightened uncertainty. Meanwhile, **spot container rates eased slightly**, with Drewry's *WCI* down **↓1%** to **$4,473/40-ft**, whereas the **HARPEX rose 1.4% to 2,413**, signalling continued tightness in charter tonnage despite some moderation in freight-rate pressure.

International inbound air cargo to ORTIA dropped slightly this week – but August volumes remain up by **↑15%** (m/m) and **↑13%** (y/y). The daily average amounted to **~541,000 kg** inbound (**↓3%**, w/w) and **~407,000 kg** outbound (**↓2%**).

The risk of a **jet fuel shortage has eased but remains material**, particularly at OR Tambo, after the Natref refinery disruption threatened Jet A-1 availability and increased reliance on coastal imports, pipeline and rail movements. Although the original disruption was expected to constrain supply from approximately **6 September to 4 October**, Sasol has since implemented measures to maintain refinery operations through end-September and now assesses the probability of an actual shortage as **low**, subject to continued effective replenishment and logistics coordination.

Global air cargo demand increased **↑2%** (w/w) and **↑5%** (y/y), while worldwide capacity remained broadly stable, rising approximately **↑1% during the week**. Average rates held at **$2.98/kg**, still **↑22% above last year**, with spot rates increasing slightly to **$3.36/kg** (**↑28%**, y/y), indicating that pricing remains firm despite relatively stable global capacity.

On the N4 corridor, movements increased considerably – by around **230 trucks a day**, as trains from KM4 to Maputo slightly increased (to an average of **2.25 trains per day**). Truck volumes through the border post increased to **1,490 HGVs per day** (**↑15%**, w/w). Overall, queue times **basically doubled** to an average of **~8 hours** (**↑90%**) at the border. The average processing times **decreased slightly** to an average of **~4 hours** (**↓7%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time increased by around **30 minutes** from last week, as transit times **increased by roughly the same magnitude**. The median

border crossing times at South African borders decreased by **two hours**, averaging **~7.5 hrs** (**↓21%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) increased – by about **half an hour** – averaging **~7 hrs** (**↑9%**). This week, on average, **four** SADC borders again took a day or more to cross, namely Chirundu OSBP, Kasumbalesa (the worst affected, taking around **four days** to cross from the **Zambian side**), Katima Mulilo and Namanga OSBP.

Other developments in the region included **(1)** materially deteriorating conditions along the Lebombo/N4 corridor, with longer queues and transit times, **(2)** severe congestion and multi-day truck delays at the Kazungula OSBP, **(3)** persistent delays at Kasumbalesa alongside progress on the planned Kasumbalesa Dry Port, and **(4)** continued progress towards modernising the Machipanda–Forbes border into a one-stop border facility.

In closing, DGT's recovery is increasingly becoming a question not simply of **how quickly the terminal normalises, but how effectively the wider logistics system manages disruption while it does so**. Any improvement in individual yard metrics should not be mistaken for recovery: the underlying trajectory remains severely impaired, with vessels at anchorage rising since mid-July, gate moves declining from late July, and the marine backlog continuing to build faster than DGT has demonstrated an ability to clear it sustainably. The practical response therefore lies in creating **system optionality**: **(1)** restoring equipment and reefer capacity at DGT; **(2)** using GIR and targeted evacuation mechanisms; **(3)** selectively diverting vessels to Pier 1, Point or the Eastern Cape; **(4)** strengthening rail links to back-of-port and inland terminals; and **(5)** ensuring that storage, demurrage and customs arrangements do not amplify an operational problem into a commercial one. The wider lesson is that resilience does not come from protecting individual nodes, but from **coordinating capacity, information and incentives across the entire port and hinterland system**.

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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 24 to 30 August (measured in TEUs)

7-day flow reported (24/08/2026 – 30/08/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Old Pier 2)	3,740	26,183	↑0.1%
New Pier (Pier 1)	1,926	13,482	↓19%
Cape Town Container Terminal	1,933	13,528	↓10%
Ngqura Container Terminal	2,786	19,502	↑22%
Port Elizabeth Container Terminal	779	5,453	↑7%
Other	413	2,891	↓48%
Total	**11,577**	**81,039**	↓4%

Source: Calculated from TPT, 2026. Updated 30/08/2026.

An average of **~11,577 TEUs** (↓4%) was handled per day for the last week (*24 to 30 August, Table 2*). Consequently, throughput was below the projected average of **~11,924 TEUs** (↓3% actual versus projected). For the coming week, an increased average of **~12,513 TEUs** (↑8%) is predicted to be handled (*31 August to 6 September*, *Table 3*).

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

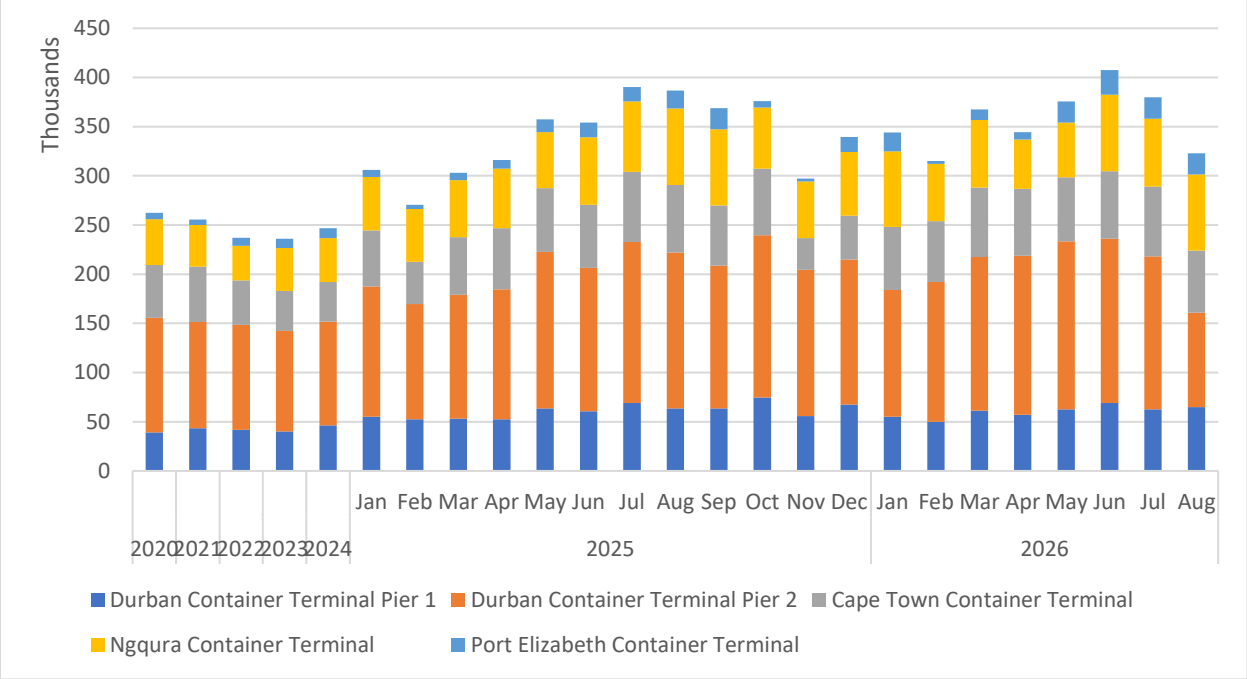
7-day flow projected (31/08/2026 – 06/09/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Old Pier 2)[6]	5,571	39,000	↑49%
New Pier (Pier 1)	1,973	13,808	↑2%
Cape Town Container Terminal	2,052	14,366	↑6%
Ngqura Container Terminal	1,741	12,186	↓38%
Port Elizabeth Container Terminal	355	2,485	↓54%
Other	821	5,744	↑99%
Total	**12,513**	**87,589**	↑8%

Source: Calculated from TPT, 2026. Updated 30/08/2026.

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 30/08/2026.

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:

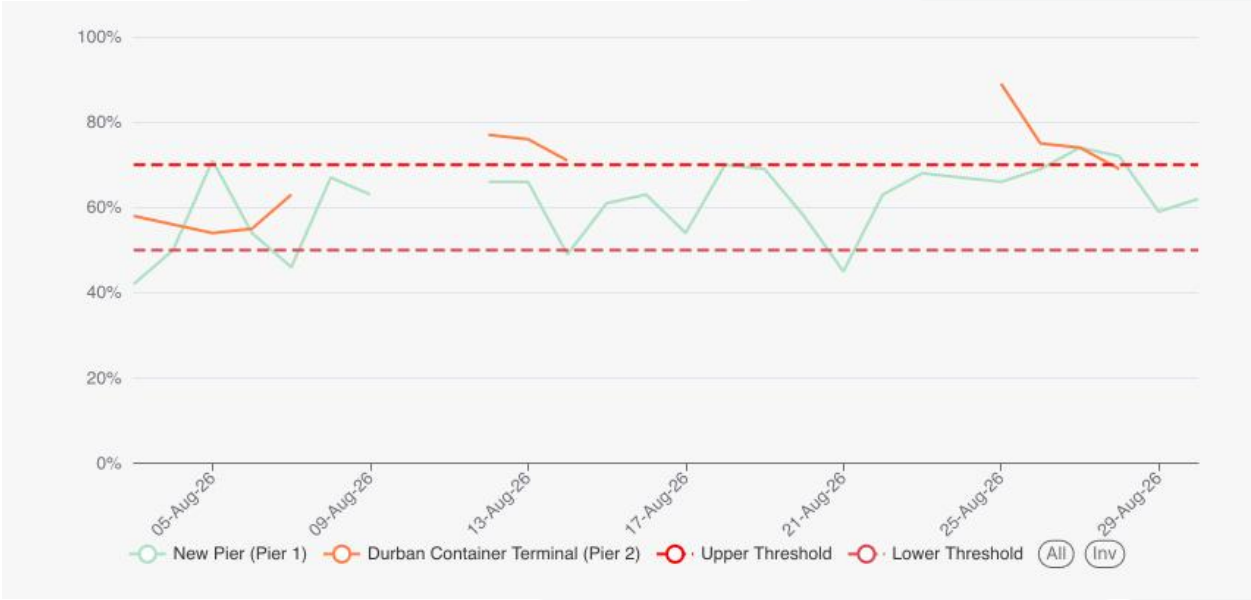
Table 4 – Vessel Dwell Time

Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.5	1.7
Cape Town	FPT	0.4	2.7
Cape Town	MPT	0.0	1.3
Durban	DGT	5.8	5.1
Durban	Pier 1	2.7	2.5
East London	MPT	0.3	1.9
Ngqura	NCT	0.9	2.0
Port Elizabeth	PECT	1.2	1.2

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:

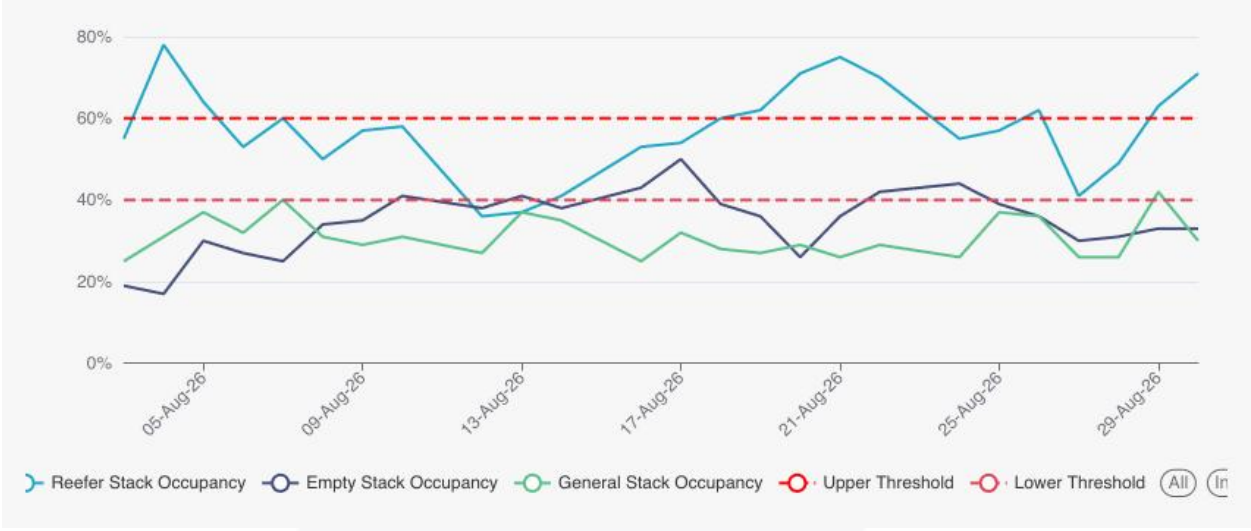
Figure 4 – Stack occupancy in Durban, general-purpose containers (2 August to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 30/08/2026.

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 (2 August to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 30/08/2026.

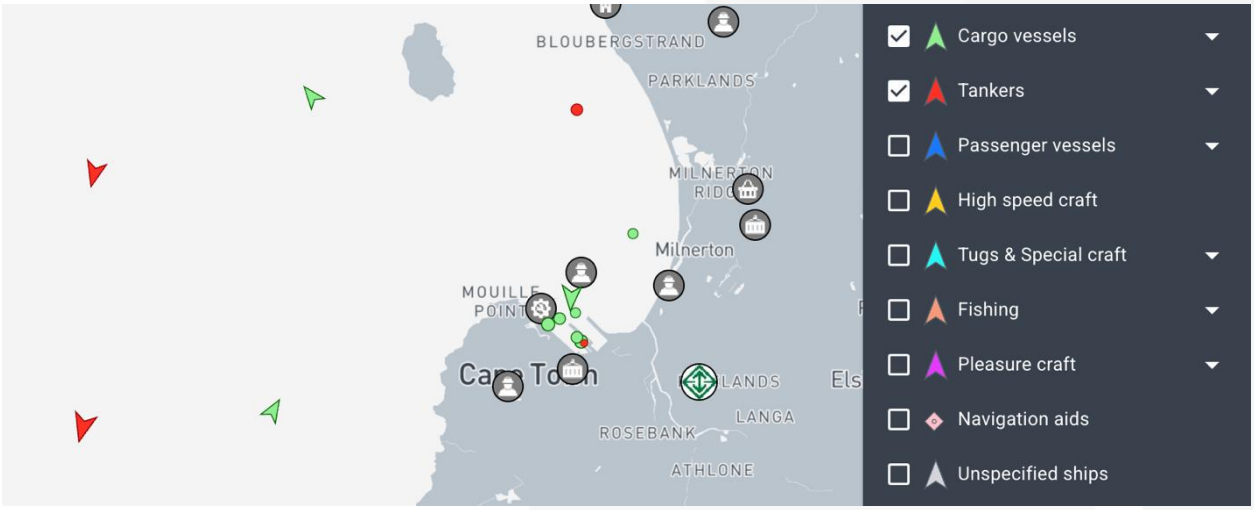
b. Summary of port operations

i. Cape Town

Cape Town Container Terminal reported a minor decline in waterside volumes, falling just below the target volume for the period, for the first time in a few weeks. The decline is likely due to poor weather conditions that plagued the port through the week. In spite of this, the time vessels spent at anchorage decreased from 29 hours to 8 hours, with vessels spending an average of 44 hours at berth. The terminal was supported by a strong complement of equipment, reporting an average of eight out of nine cranes, and 29 out of 32 RTGs available throughout the week.

AGL Terminals reported a strong week, with two vessels calling at the terminal and moving just under 4,000 TEUs for the week. Vessels spent only 8 hours at anchorage, and an average of 127 hours at berth. Both cranes were in operation, supporting the terminal.

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



Source: Marine Traffic. Updated 30/08/2026 at 14:00.

ii. Durban

Pier 1 recorded a 19% decline in waterside volumes, falling just short of the target volumes. In spite of the congestion experienced in the Port of Durban, vessel time at anchorage declined from 96 hours to 30 hours, with vessels spending an average of 68 hours at berth. Equipment availability was mixed, with four out of seven cranes available along with 27 out of the required 25 RTGs in operation throughout the week. By the end of the week, the terminal had two vessels waiting at anchorage, likely to increase by one or two as the week progresses. The **TTT** for the week averaged **~48 minutes** (**↑2%**, w/w), and the average **staging time** was **~34 minutes** (**↓11%**).

Over the reporting period, Durban Gateway Terminal continues to recover from congestion, with the vessels that berthed over the reporting period waiting an average of **215 hours at anchorage**. Waterside volumes showed no change from the previous reporting period. Yard stacks remained critically high, while a few vessels have opted to bypass Durban, moving over the Eastern Cape.

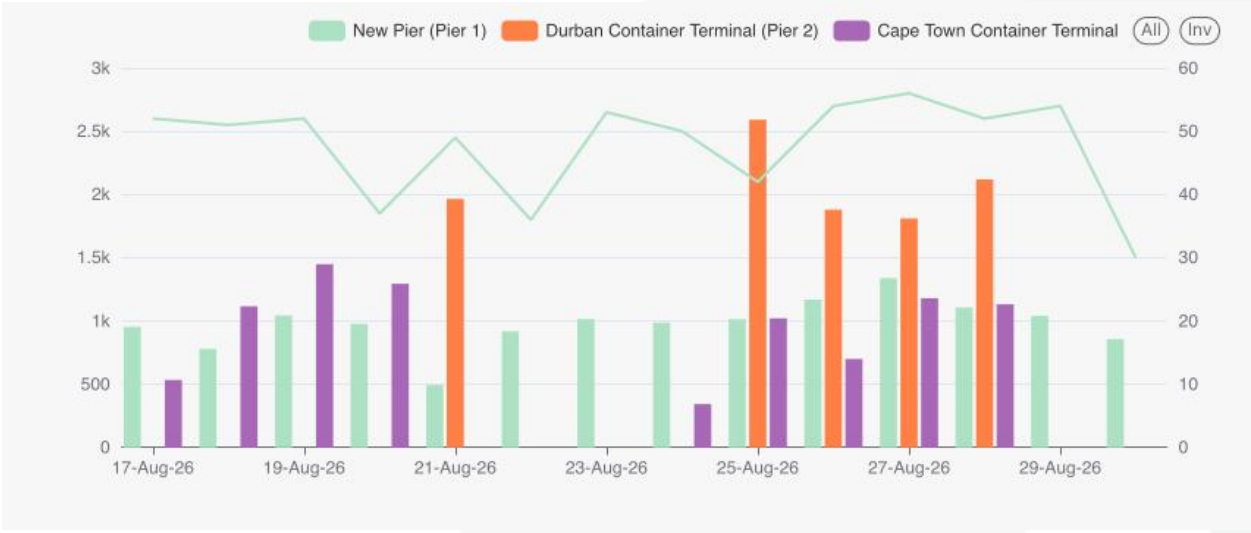
The latest daily data point, however, points to an **improvement in landside and yard conditions between 2 and 3 September**. Overall stack occupancy declined from **69.1% to 63.8%**, while road-import containers on hand fell by **564 units, from 5,497 to 4,933**. Reefer conditions also improved, with stack occupancy decreasing from **85% to 62%**, ground-slot utilisation from **96% to 86%**, and plug utilisation from **77% to 57%**. Rail containers on hand also declined from **298 to 206**, while rail evacuation increased from **76 to 154 containers** over the latest 24-hour period.

Landside throughput strengthened concurrently, with gate moves increasing from **1,320 to 1,683**, including **1,080 import and 503 export movements**, while the number of active export stacks increased from three to four. The principal remaining pressure is therefore increasingly on the **waterside**, where the anchorage queue increased marginally from **nine to ten vessels**, with one additional vessel due to arrive. Overall, the latest movement suggests that DGT is making some progress in restoring yard fluidity and evacuation capacity. However, clearing the accumulated vessel backlog will remain the next critical phase of recovery.

Durban Multi-Purpose Terminal experienced an unexpected decline in waterside volumes (falling by 62%), with vessels waiting around 100 hours at anchorage and spending over 50 hours at berth. As vessels continue to wait at the port, a stronger performance from MPT could support clearing the backlog.

Lastly, on 1 September, the 180-metre bulk carrier **HAWK S** collided with a quay in the Port of Durban during a harbour manoeuvre, sustaining substantial damage to its bow section. The cause remains under investigation, while TNPA/Transnet is assessing any damage to port infrastructure and potential implications for berth availability and wider port operations.

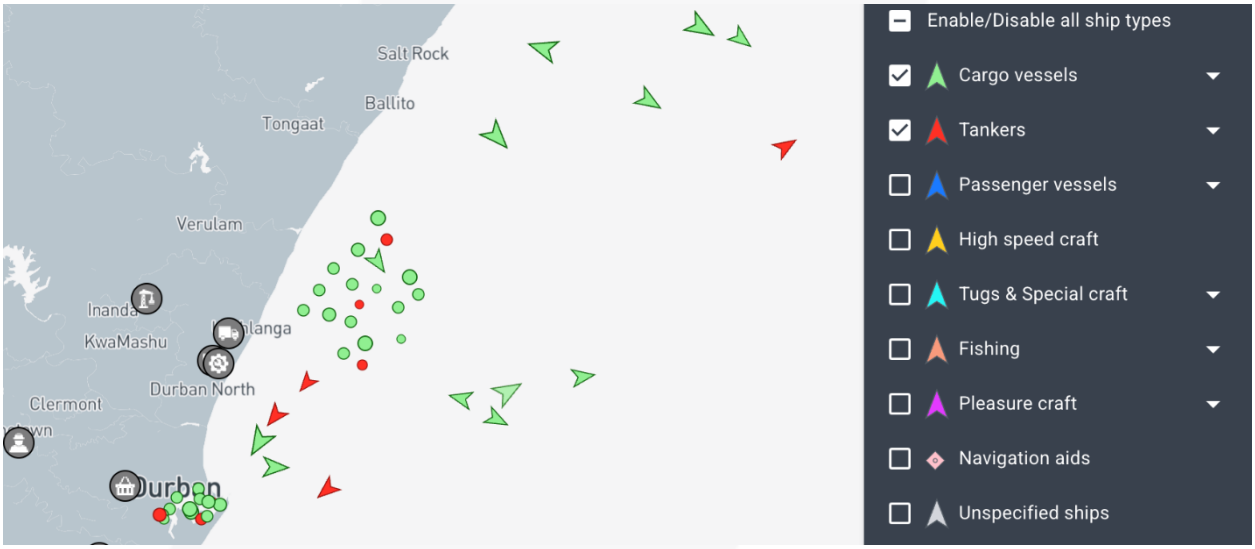
Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 30/08/2026.

The queue of container vessels waiting outside Durban increased this week to 30 vessels from last week's 26. On Wednesday morning (2 September), **twelve** container vessels were waiting outside at anchorage for Durban, **nine** for DGT and three for Pier 1. The queue of dry (**six**), liquid (**four**), and breakbulk (**four**) vessels **was relatively stable** from last week:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 30/08/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal reported an increase in waterside volumes, well outperforming their target for the period, in spite of some weather delays, as vessels are diverted to the terminal to support clearing the backlog at the Port of Durban, particularly at DGT. Vessels spent an average of 29 hours at anchorage and 55 hours at berth. The terminal operated with a strong complement of equipment, reporting an average of seven out of eight cranes and 24 out of 30 RTGs available throughout the week.

Port Elizabeth Container Terminal continued its strong run with a 7% increase in waterside volumes, reaching more than double the targeted volume. An impressive figure, as with NCT, likely boosted by the situation in DGT. Vessels spent an average of 35 hours at anchorage and 26 hours at berth, with some weather delays experienced throughout the week. The terminal reported an average of two out of three cranes and 15 out of the required 11 straddle carriers in operation to support the strong performance.

iv. Richards Bay

At RBCT, the daily average coal throughput for the week **remained relatively stable and** averaged close to **195,000 tons** (**no change**, w/w) per day. With an average of **13 trains per day** being serviced, below the target of 22.

v. Transnet Freight Rail (TFR)

In the last week (*24 to 30 August*), rail cargo on the ConCor line out of Durban was reported at **1,514** containers, up by **↑94%** from the previous week's **781** containers.

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

Source: Calculated using data from Transnet, 2025. Updated 30/08/2026.

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 (*24 to 30 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

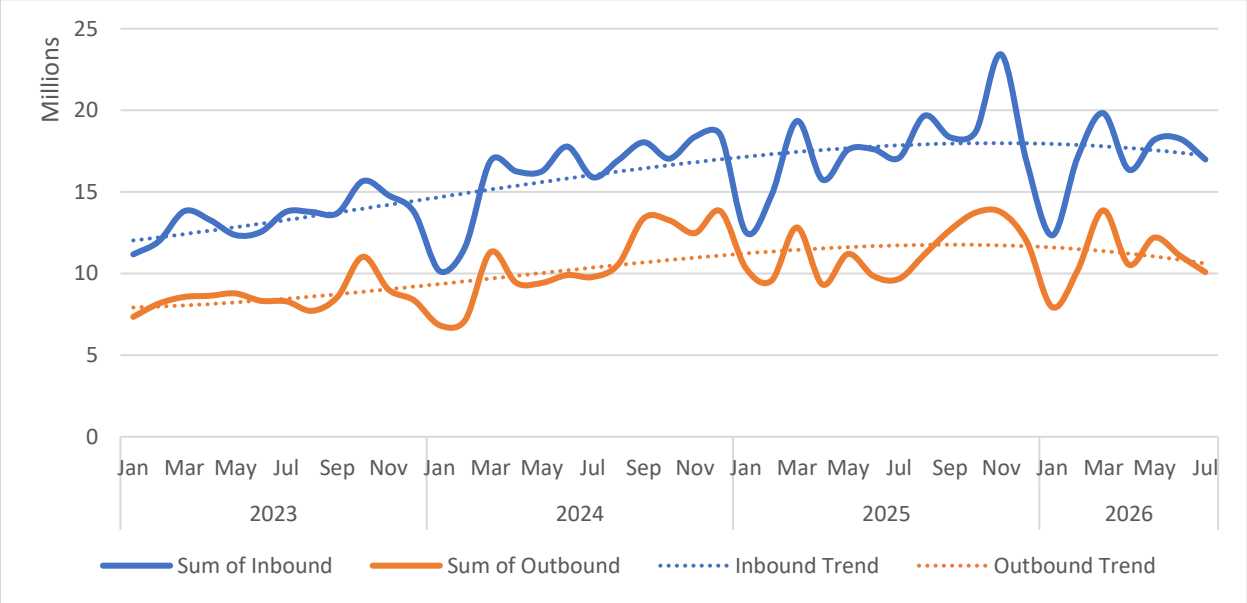
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**541,160**	**3,788,119**	**↓3%**
Volume outbound	**406,827**	**2,847,790**	**↓2%**
Total	**947,987**	**6,635,909**	**↓3%**

Courtesy of ACOC. Updated: 30/08/2026.

International inbound air cargo to ORTIA dropped slightly this week – but August volumes remain up by **↑15%** (m/m) and **↑13%** (y/y). The daily average amounted to **~541,000 kg** inbound (**↓3%**, w/w) and **~407,000 kg** outbound (**↓2%**).

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: 30/08/2026.

The latest reported fuel stock days (as of Wednesday afternoon, 2 September) per airport indicate:

- ORTIA: **5.5 days** (target: 5 days)
- CTIA: **5 days** (target: 4 days)
- Durban: **13.2 days** (target: 5 days)

The risk of a **jet fuel shortage has eased but remains material**, particularly at OR Tambo, after the Natref refinery disruption threatened Jet A-1 availability and increased reliance on coastal imports, pipeline and rail movements. Although the original disruption was expected to constrain supply from approximately **6 September to 4 October**, Sasol has since implemented measures to maintain refinery operations through end-September and now assesses the probability of an actual shortage as **low**, subject to continued effective replenishment and logistics coordination.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*24 to 30 August)*, movements increased considerably – by around **230 trucks a day**, as trains from KM4 to Maputo slightly increased (to an average of **2.25 trains per day**).

- Truck volumes through the border post increased to **1,490 HGVs per day** (**↑15%**, w/w).
- Overall, queue times **basically doubled** to an average of **~8 hours** (**↑90%**) at the border.
- The average processing times **decreased slightly** to an average of **~4 hours** (**↓7%**) per crossing.

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

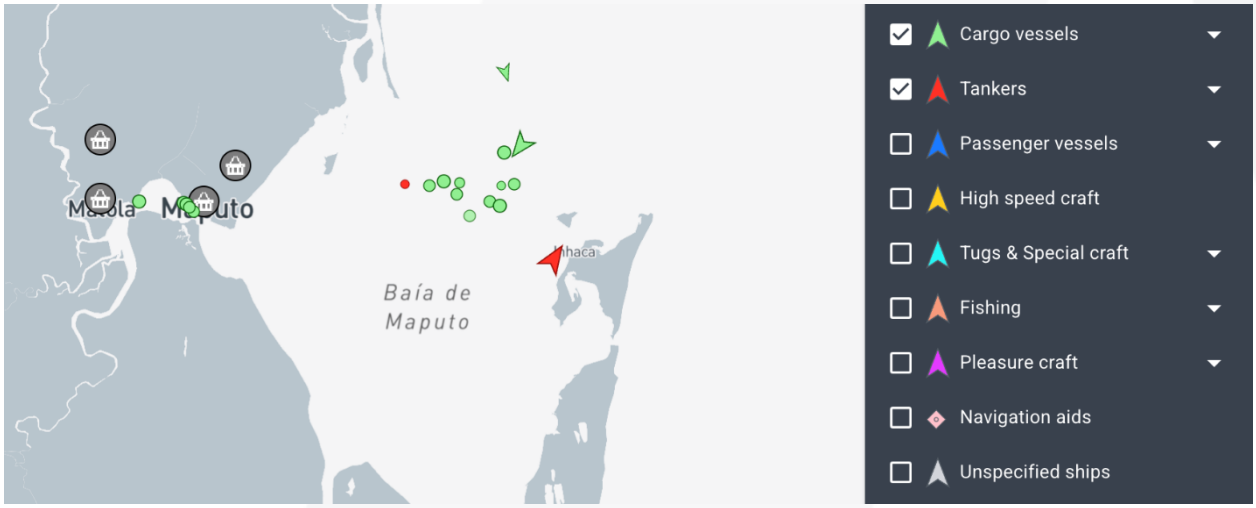
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,490	1,423	1,115	216	44	84	40	287
% (w/w)	**15%**	**12%**	**16%**	**13%**	**3%**	**27%**	**20%**	**20%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 30/08/2026.

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 30/08/2026 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 decreased by **two hours**, averaging **~7.5 hrs** (**↓21%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) increased – by about **half an hour** – averaging **~7 hrs** (**↑9%**).

1. **Lebombo/N4 corridor conditions deteriorated materially:**
    a. The average border queue increased by **↑180%** to **~12 km** for the week ending 23 August.
    b. Queueing time increased to four hours and Pretoria–Maputo transit time to **~23.3 hours**, while ongoing stop-and-go traffic management reportedly contributed to queues of **20 km**.
2. **Severe congestion emerged at the Kazungula OSBP:**
    a. Industry representatives reported multi-day truck queues extending into Botswana.
    b. Recent ZRA processing workflows and system-verification procedures have been identified as contributing factors, prompting calls for additional off-site truck holding capacity and operational intervention at the border.
3. **Kasumbalesa remains the region's most severe border bottleneck:**
    a. Crossing times from the Zambian side average approximately three days.
    b. Separately, the DRC progressed plans for the Kasumbalesa Dry Port during the week, completing project due diligence and targeting the start of construction in January 2027 as part of efforts to decongest the critical Zambia–DRC gateway.
4. **Machipanda–Forbes border modernisation:**
    a. Mozambique is advancing the modernisation of the Machipanda–Forbes border on the Beira Corridor, with the proposed one-stop border facility incorporating expanded road and border infrastructure to improve freight flows between Mozambique and Zimbabwe.
    b. Construction is currently targeted to commence in October.

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	626	19.6	5.2	19.4	18,780	4,382
Beitbridge	Zimbabwe-SA	582	4.7	1.4	4.4	17,460	4,074
Groblersbrug	SA-Botswana	229	8.3	1.3	8.2	6,870	1,603
Martin's Drift	Botswana-SA	164	1.3	0.2	1.2	4,920	1,148
Kopfontein	SA-Botswana	246	6.6	2.2	6.4	7,380	1,722
Tlokweng	Botswana-SA	39	0.6	0.2	0.4	1,170	273
Vioolsdrift	SA-Namibia	30	4.1	1.3	4.1	900	210
Noordoewer	Namibia-SA	20	2.3	0.5	2.2	600	140
Nakop	SA-Namibia	30	4.9	1.3	5.5	900	210
Ariamsvlei	Namibia-SA	20	1.2	0.4	1.1	600	140
Skilpadshek	SA-Botswana	307	11.0	2.4	10.6	9,210	2,149
Pioneer Gate	Botswana-SA	92	9.5	1.2	9.3	2,760	644
Ramatlabama	SA-Botswana	183	2.4	0.3	2.2	5,490	1,281
Ramatlabama	Botswana-SA	107	0.4	0.1	0.3	3,210	749
Lebombo	SA-Mozambique	1,227	16.0	1.3	4.0	36,810	8,589
Ressano Garcia	Mozambique-SA	1,212	3.5	0.3	3.3	36,360	8,484
Sum/Average		**5,114**	**7.6**	**1.2**	**5.2**	**153,420**	**35,798**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 23/08/2026.

[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.

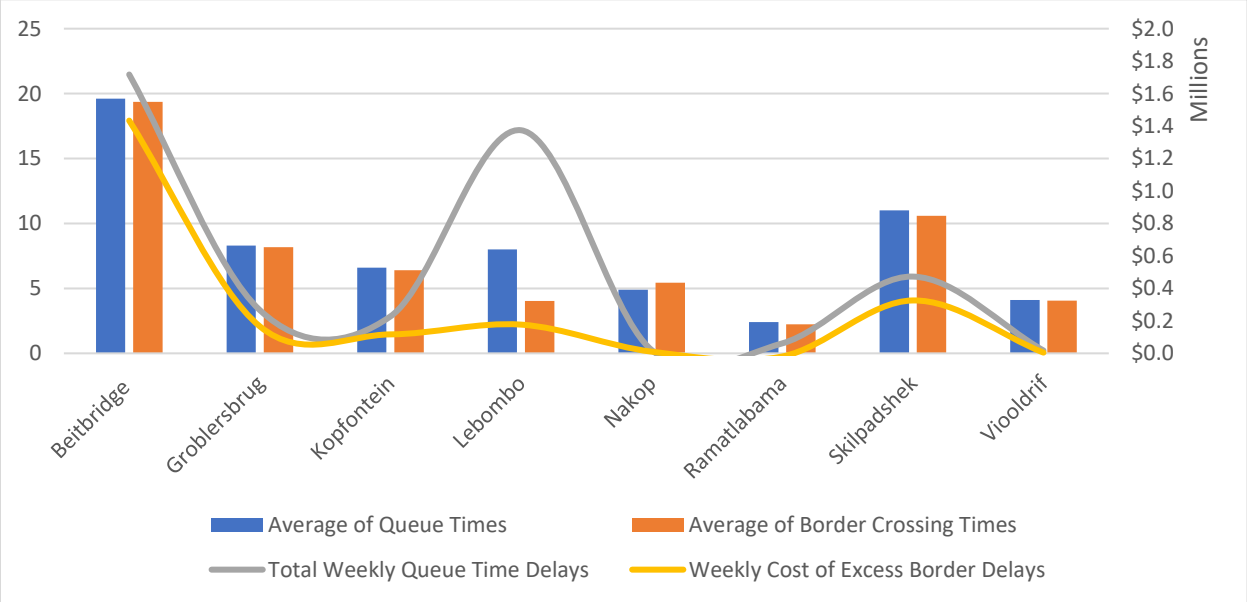
Table 8 – Delays summary – Corridor perspective

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	6.9	1.5	6.5	2,240	9,600
Central Corridor	798	5.7	0.8	5.6	5,586	23,940
Dar Es Salaam Corridor	1,819	17.8	4.5	17.6	12,733	54,570
Maputo Corridor	2,439	5.8	0.8	3.7	17,073	73,170
Nacala Corridor	127	0.0	0.0	0.0	889	3,810
North/South Corridor	3,726	13.4	3.1	13.3	26,082	111,780
Northern Corridor	2,817	0.4	0.1	0.4	21,588	92,520
WBNLD Corridor	1,004	4.4	0.9	4.1	7,028	30,120
Trans Cunene Corridor	100	3.1	0.9	3.2	700	3,000
Trans Kalahari Corridor	100	0.0	0.0	0.0	700	3,000
Trans Oranje Corridor	116	24.7	1.6	24.6	812	3,480
Sum/Average	**13,366**	**7.2**	**1.5**	**7.1**	**95,431**	**408,990**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 23/08/2026.

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

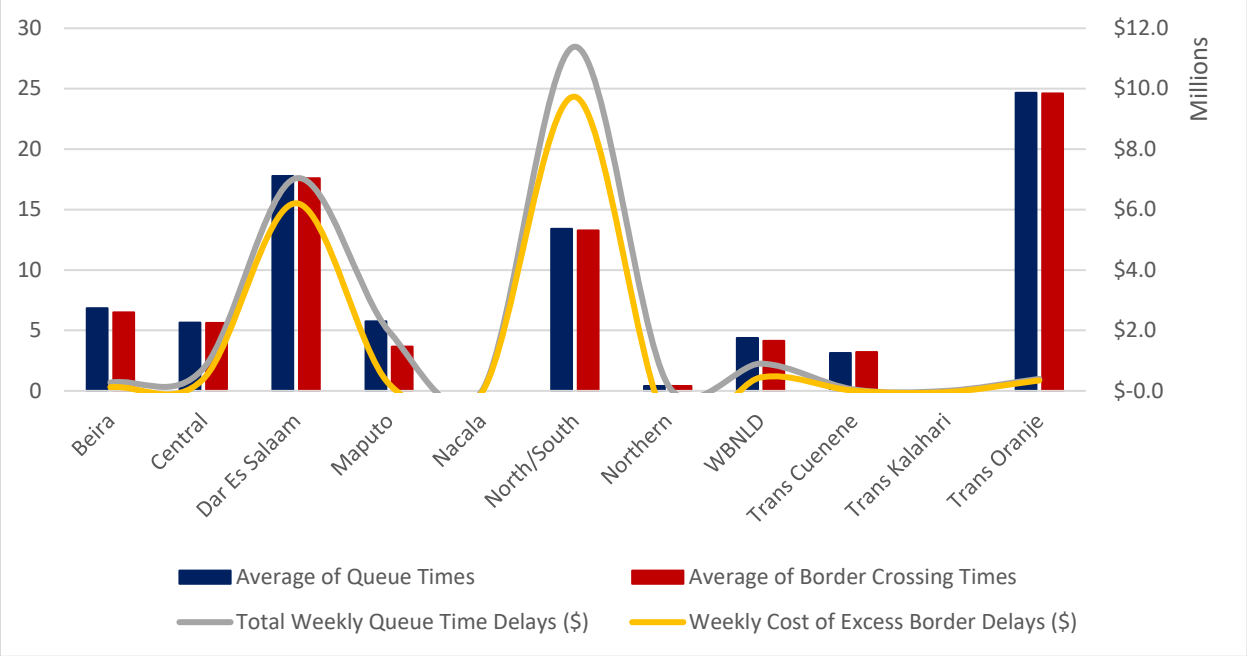
Figure 12 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 23/08/2026.

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 23/08/2026.

In summary, cross-border queue time averaged **~7.2 hours** (up by **~0.4 hours** from the previous week's **~6.8 hours**), indirectly costing the transport industry an estimated **$23 million** (**R371 million**). Furthermore, the week's average cross-border transit times hovered around **~7.1 hours** (up by **~0.3 hours** from the previous week's **~6.7 hours**), at an indirect cost to the transport industry of **$16.3 million** (**R263 million**). The total indirect cost for the week amounts to an estimated **~$39.3 million** (**R634 million**, up by **↑20%** from the **~R526 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.

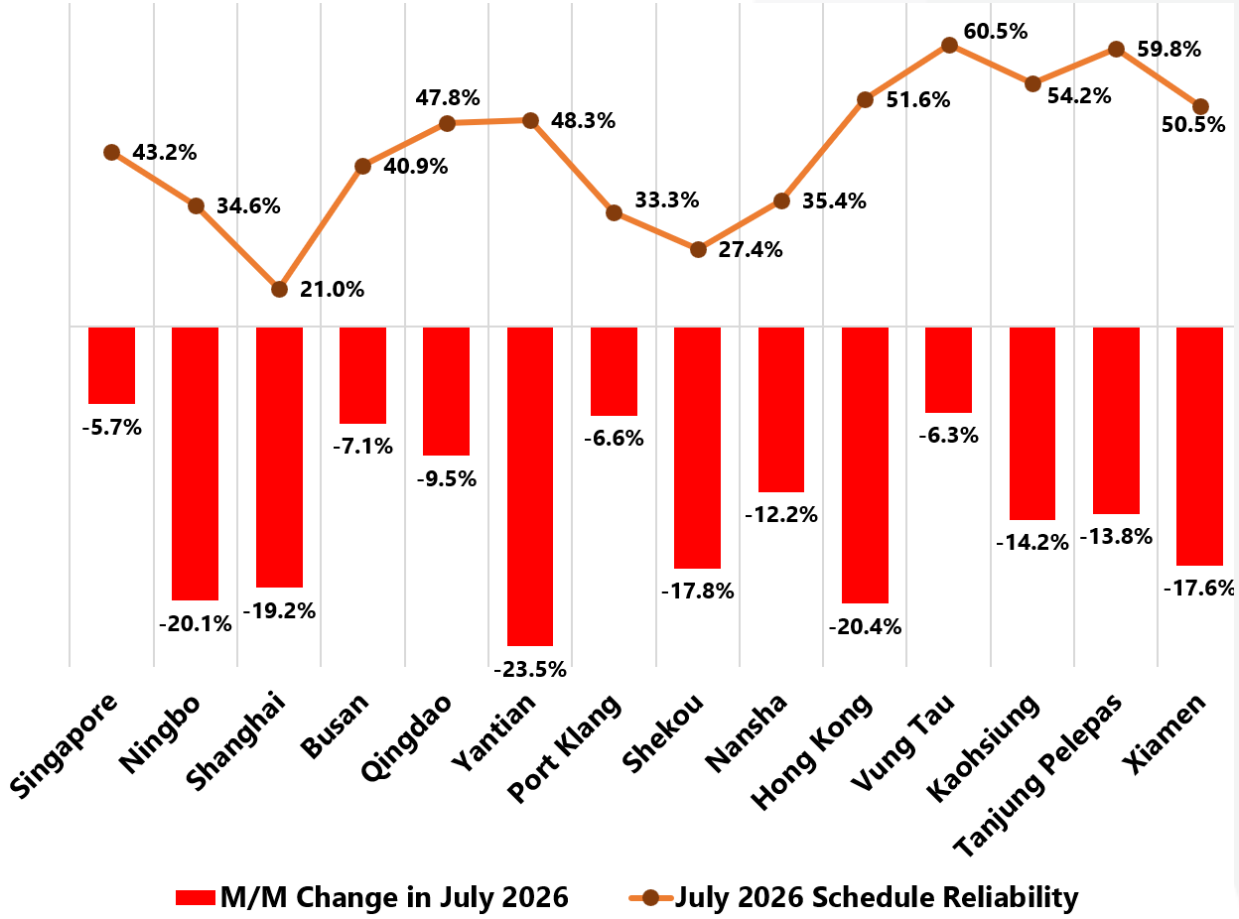
a. Global shipping industry

i. Global container port congestion and overview

Global container shipping conditions deteriorated further during the latest reporting period, with renewed congestion across major Asian hubs materially disrupting schedules and absorbing vessel capacity. Linerlytica estimates that **3.92 million TEU, equivalent to 11.4% of the global fleet, remained tied up at anchorages last week**, as *Typhoon Saudel* severely disrupted operations at Ningbo and Shanghai and produced **delays exceeding 10 days** in the worst cases. *Sea-Intelligence* consequently recorded a sharp fall in **global schedule reliability to 56.4% in July**, down **↓6.1%** (m/m) – the steepest monthly deterioration since January 2021 – while the average delay for late vessel arrivals increased to **6.06 days**.

Conditions were particularly weak at major Asian ports, including Shanghai, where only **21.0% of vessels arrived on time**, raising the risk of cascading delays across key head-haul trades in the coming months. Meanwhile, capacity conditions remain structurally tight in the near term despite a **record global orderbook of 14.84 million TEU**, as August newbuilding deliveries fell to a three-year low and congestion continues to remove effective capacity from circulation.

Figure 14 – Asia schedule reliability (July 2026)



Source: Sea Intelligence

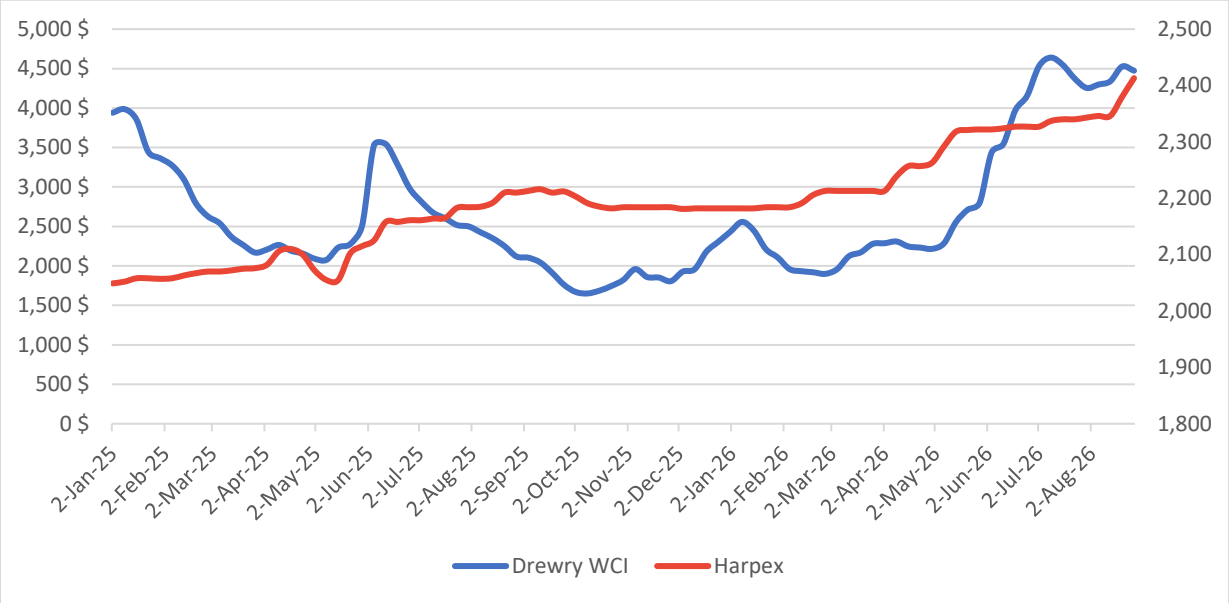
ii. Red Sea Transits

In the **Red Sea**, carriers continue a cautious return to the Suez route, with Maersk/Hapag-Lloyd shifting the AE19 service back through the corridor and other major lines increasing selective transits; however, security risks remain elevated, and **Bab el-Mandeb traffic remains below normal levels**. Meanwhile, conditions in the **Strait of Hormuz remain highly disrupted**, with only four commodity vessels recorded transiting on Tuesday versus a recent 10-day average of around 13. At the same time, Iran has expanded its blacklist of restricted vessels to **56 ships**, sustaining considerable uncertainty around Gulf shipping flows.

iii. Global container freight – and charter rates

Global container spot rates edged lower last week, with Drewry's *World Container Index* decreasing by **↓1% to $4,473 per 40-ft container**, as softer rates on the major east–west trades outweighed otherwise resilient demand. In contrast, the containership charter market continued to strengthen, with the **HARPEX rising by ↑1.4%** (w/w) **to 2,413**, extending its recent upward trend as charter rates increased across several vessel-size segments. With the respective directional shifts, spot and charter rates have again converged:

Figure 15 – World Container Index (Drewry) and Charter Rates (Harpex)



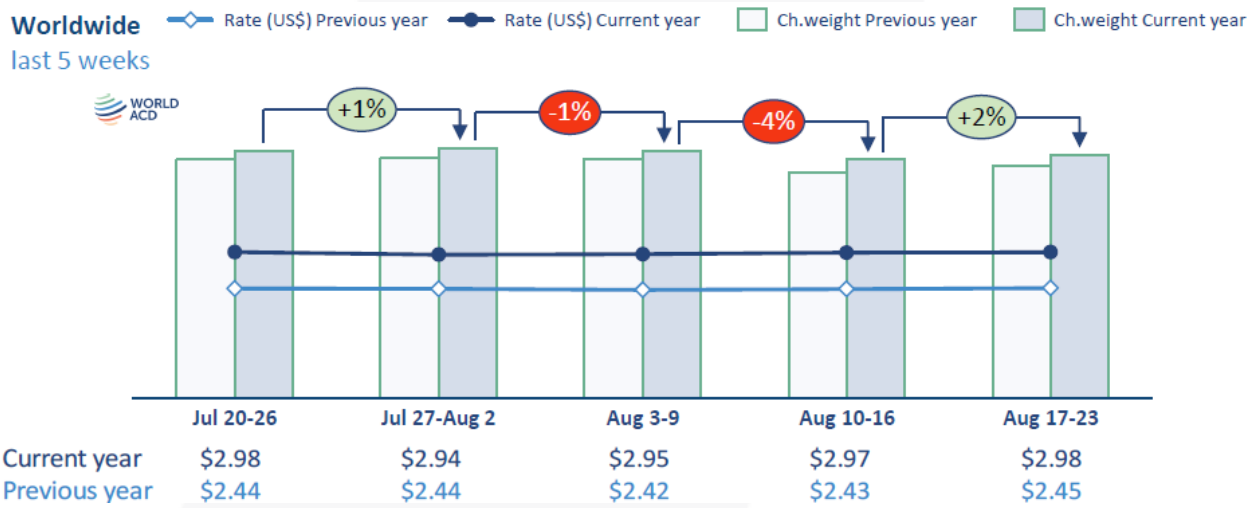
Source: Drewry & Harper Petersen

Overall, the market therefore remains bifurcated: **spot freight rates are showing some stabilisation after their recent surge, while vessel charter rates remain firm**, indicating continued tightness in available tonnage despite modest easing in cargo-rate pressure.

b. Global air cargo industry

The latest weekly data from WorldACD show that global air cargo demand strengthened modestly in **week 34 (17–23 August)**, with worldwide chargeable weight increasing by **↑2%** (w/w) and **↑5%** (y/y). The improvement was driven primarily by a **↑7% weekly rebound in Asia-Pacific origin volumes** and a **↑4% increase from Middle East and South Asia (MESA)**. In comparison, volumes from Europe and North America declined by **↓4%** and **↓2%**, respectively.

Figure 16 – Chargeable weight and rates (past five weeks)



Source: WorldACD

Global capacity remained comparatively stable, increasing by approximately **↑1%** (w/w) and standing almost **↑3% above pre-Iran-conflict levels**. Regional constraints nevertheless remain pronounced, with MESA capacity still around **↓11% below pre-conflict levels** and Gulf capacity around **↓17% lower**. Pricing remained firm: average worldwide rates were unchanged at **$2.98/kg**, but remained **↑22% above last year**, while global spot rates increased by **↑1% to $3.36/kg**, some **↑28% higher year on year**.

ENDS[10]

[10]***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.*