Authored by:
www.saaff.org.za

Distributed by:
www.busa.org.za

Cargo Movement Update #298[1]

Date: 6 September 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)	36,698	41,809	**78,507**	37,881	43,158	**81,039**	↓3%
Air Cargo (tons)	4,022	2,515	**6,536**	3,788	2,848	**6,636**	↓1%

Monthly Snapshot

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

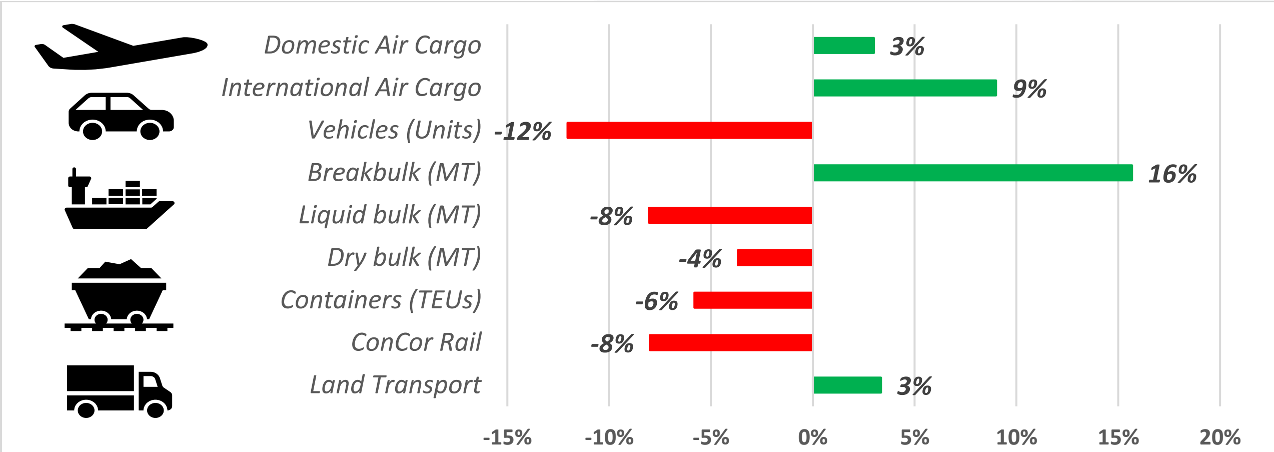
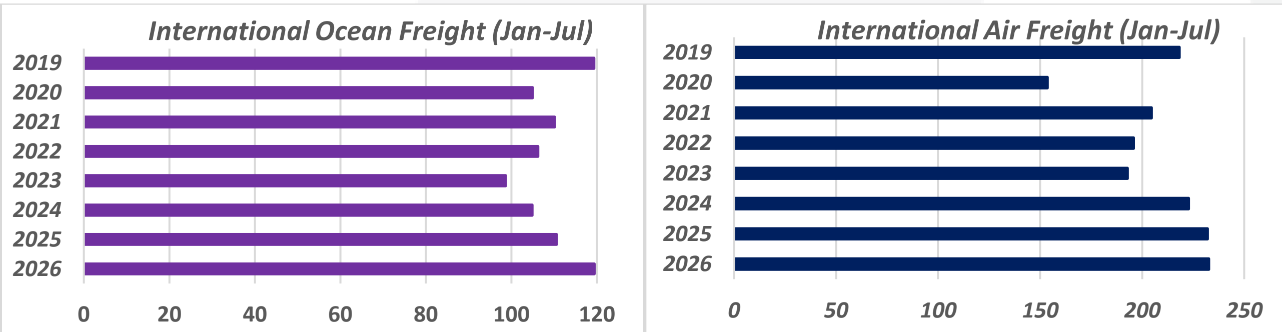


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **11,215 TEUs** was handled per day, with **12,513 TEUs** projected for next week.
- **DGT latest**: Throughput **~3,672 TEUs/day** (~4 weeks), **↓31%** vs average. General stack stable; Reefers not.
- Rail cargo handled out of Durban was reported at **1,064** containers, down by **↓30%** versus last week.
- Cross-border queue: **↑2.7 hrs**; transit: **↑3.1 hrs**; SA borders: **~9.5 hrs** (**↑26%**); SADC: **~7 hrs** (**no change**).
- Worsening **Asian port congestion** is impacting **1,137 vessels** and moving **4.97 million TEUs** out of circulation.
- Global air tonnage up **↑5%** (y/y), rates up **↑22%**, and capacity up **↑2%**. *IATA*: CTKs for July: **↑3.9%** (y/y).

---

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *298th* 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 **11,215 TEUs** was handled daily, a decrease from **11,577 TEUs** the previous week.

DGT remains severely constrained, with **average throughput** over the last four weeks approximately **↓30.5% below** the preceding four-month **average**, while yard, reefer and landside **indicators continue to show volatility rather than sustained recovery.** Although the anchorage queue has reduced and approximately **11,550 containers have been rerouted**, the terminal remains materially below normal operating performance, and industry continues to rely on diversion and mitigation strategies to contain the wider supply-chain impact.

Though Pier 1 did not show much change in waterside volume, some slack is being picked up by Durban MPT, and multiple vessels are being rerouted to the Eastern Cape. As a result, NCT and PECT reported strong volumes for the week, far exceeding their target. In contrast, Terminals at the Western Cape (particularly AGL and CTCT) reported some delays.

Transnet Port Terminals (TPT) issued a notice dated 9 September 2026 confirming that force majeure at Durban Container Terminal Pier 1 has been lifted, effective 04h01 on 7 September 2026. The force majeure had been declared after a four-hour power outage disrupted terminal operations, with refrigerated containers the worst affected. Power was restored at 04h00 on 7 September, and customers were advised of this via the Customer Interaction Centre at 07h25 that morning. TPT reaffirms its commitment to improving terminal efficiency.

Global shipping conditions remained dominated by escalating **Middle East geopolitical risk**, with disruption across the **Red Sea/Bab el-Mandeb and Strait of Hormuz** continuing to affect vessel routing, insurance, bunker costs and energy markets. Brent crude breached **$100/barrel**, while Singapore VLSFO prices stood more than **60% above pre-war levels**, materially increasing voyage economics. At the same time, worsening **Asian port congestion** affected **1,137 vessels** and removed approximately **4.97 million TEUs of capacity from circulation**, contributing to global schedule reliability falling to **56.4%** and average delays exceeding six days. Container spot markets nevertheless remained broadly stable, with Drewry's WCI at **$4,476/40ft**, while carrier capacity management and blank sailings continued to constrain effective supply. Carrier profitability also strengthened sharply, with average Q2 EBIT margins rising to **10.4%**, and further gains expected in Q3.

International inbound air cargo to ORTIA was projected to be stable this week; however, will be reconciled next week. The daily average amounted to **~574,500 kg** inbound (**↑6%**, w/w) and **~359,000 kg** outbound (**↓12%**).

The ongoing *ORTIA Freight Warehouse Refurbishment Project* will involve phased external roadway, parking-area and loading-dock repairs from **9 September through late October**, affecting multiple cargo operators across Warehouses 1–37. Temporary access restrictions will apply throughout the works, with roadway repairs causing interruptions ranging from approximately two hours to full-day closures, while affected loading docks will be subject to full access restrictions during repair and curing periods; operators have been advised to adjust loading, collection and vehicle-movement arrangements accordingly.

IATA reports that global air cargo demand remained resilient in July, with **CTKs increasing ↑3.9%** (y/y), outpacing **ACTK growth of ↑1.7%** and lifting the global cargo load factor to **46%**. African carriers underperformed the global market, with **CTKs up only ↑1.1% against ↑4.1% capacity growth**, while the Africa–Asia corridor contracted sharply.

According to the high-velocity numbers from World ACD, global air cargo remained resilient in August, with **tonnage up 5% year-on-year, rates up 22%, and capacity up 2%**, although pricing continued to ease from the elevated levels seen earlier in 2026. The main weakness remains Hong Kong–Europe traffic, down **30% year-on-year** following changes to EU *de minimis* rules, although recent weekly data suggest volumes may be beginning to stabilise.

On the N4 corridor, movements decreased considerably – by around **121 trucks a day**, as trains from KM4 to Maputo were stable (at an average of **2.25 trains per day**). Truck volumes through the border post decreased to **1,369 HGVs per day** (**↓9%**, w/w). Overall, queue times **reduced after some congestion last week** to an average of **~4.7 hours** (**↓41%**) at the border. The average processing times **increased slightly** to an average of **~4.4 hours** (**↑10%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time **increased considerably this week** – by around **two and a half hours** from last week, as transit times **increased by roughly the same magnitude**. The median border crossing times at South African borders increased by **two hours**, averaging **~9.5 hrs** (**↑26%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) remained mostly stable – averaging **~7 hrs** (**no change**). This week, on average, **five** SADC borders again took a day or more to cross, namely Chirundu OSBP, Horo Horo, Kasumbalesa (the worst affected, taking around **five days** to cross from the **Zambian side**), Katima Mulilo and Namanga OSBP.

Other developments in the region included **(1)** clarification in Mozambique that new spare-tyre requirements apply to the main vehicle only, **(2)** a Zimbabwean police warning over criminal activity targeting trucks along the Lion's Den–Karoi section of the Harare–Chirundu corridor, and **(3)** the expansion of the TransAfrica Border Hub/FESARTA Trip Costing System across Southern and Eastern African corridors.

In closing, this week's GDP figures provide an important context for the current DGT crisis. South Africa's economy contracted by **↓0.2% in Q2 2026**, with particularly weak performances from manufacturing and trade — precisely the sectors whose competitiveness depends on reliable access to domestic and international supply chains.[6] Logistics should therefore not be viewed simply as another sector within GDP, but as an **enabling infrastructure for economic activity across sectors**. With container-dependent activity estimated to underpin roughly **24% of national economic output**, sustained disruption at the country's principal container gateway inevitably raises the cost, uncertainty and working-capital requirements of doing business. The present DGT difficulties did not cause the Q2 contraction, but they illustrate a wider structural problem: **an economy struggling to generate growth can least afford logistics infrastructure that constrains, rather than enables, trade and production**. Restoring reliable container logistics is therefore not merely an operational imperative; it is an economic competitiveness imperative.

[6] STATS SA. 09/09/2026. Gross Domestic Product (GDP), 2nd Quarter 2026.

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 31 August to 6 September (measured in TEUs)

7-day flow reported (31/08/2026 – 06/09/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Previously Pier 2)	3,525	24,673	**↓6%**
New Pier (Pier 1)	1,923	13,461	**0%**
Cape Town Container Terminal	1,346	9,422	**↓30%**
Ngqura Container Terminal	2,764	19,345	**↓1%**
Port Elizabeth Container Terminal	809	5,660	**↑4%**
Other	849	5,946	**↑106%**
Total	**11,215**	**78,507**	**↓3%**

Source: Calculated from TPT, 2026. Updated 06/09/2026.

An average of **~11,215 TEUs** (**↓3%**) was handled per day for the last week (*31 August to 6 September, Table 2*). Consequently, throughput was below the projected average of **~12,513 TEUs** (**↓10%** actual versus projected). For the coming week, an increased average of **~12,513 TEUs** (**↑12%**) is predicted to be handled (*7 to 13 September*, *Table 3*).

Table 3 – Container Ports – Weekly flow projected for 7 to 13 September (measured in TEUs)

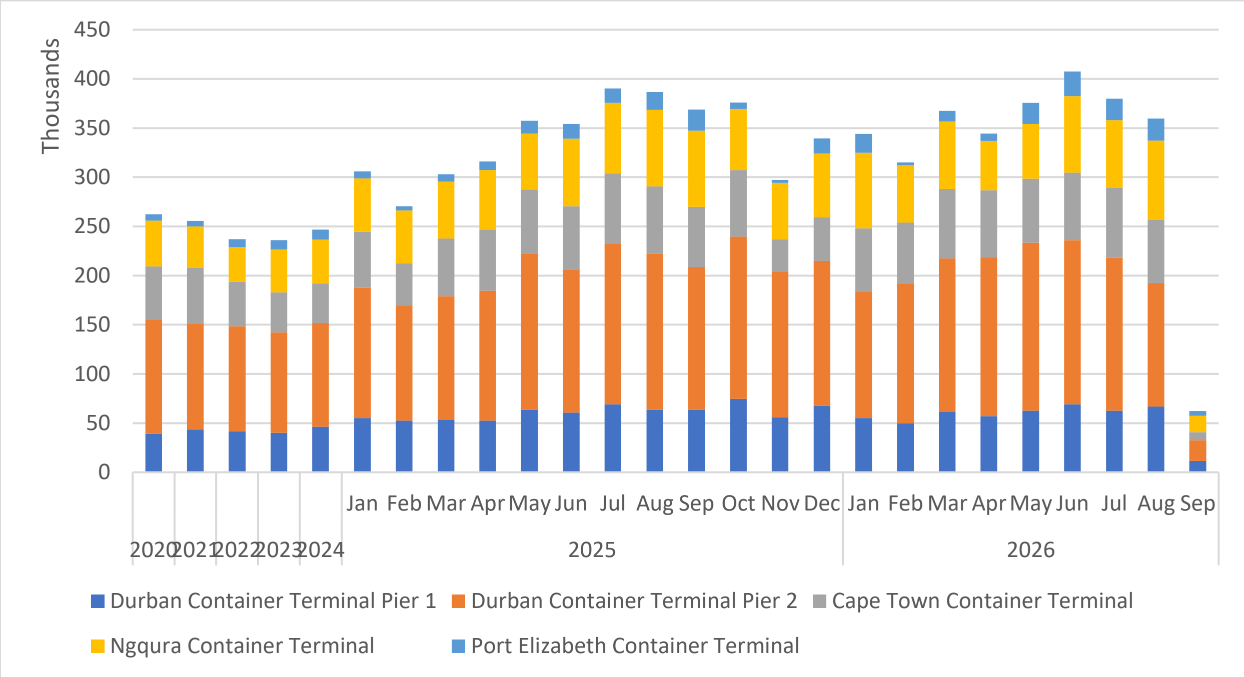
7-day flow projected (07/09/2026 – 13/09/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Previously Pier 2)[7]	-	-	-
New Pier (Pier 1)	1,973	13,808	**↑3%**
Cape Town Container Terminal	2,052	14,366	**↑52%**
Ngqura Container Terminal	1,741	12,186	**↓37%**
Port Elizabeth Container Terminal	355	2,485	**↓56%**
Other	821	5,744	**↓3%**
Total	**12,513**	**87,589**	**↑12%**

Source: Calculated from TPT, 2026. Updated 06/09/2026.

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.

[7] 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 06/09/2026.

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

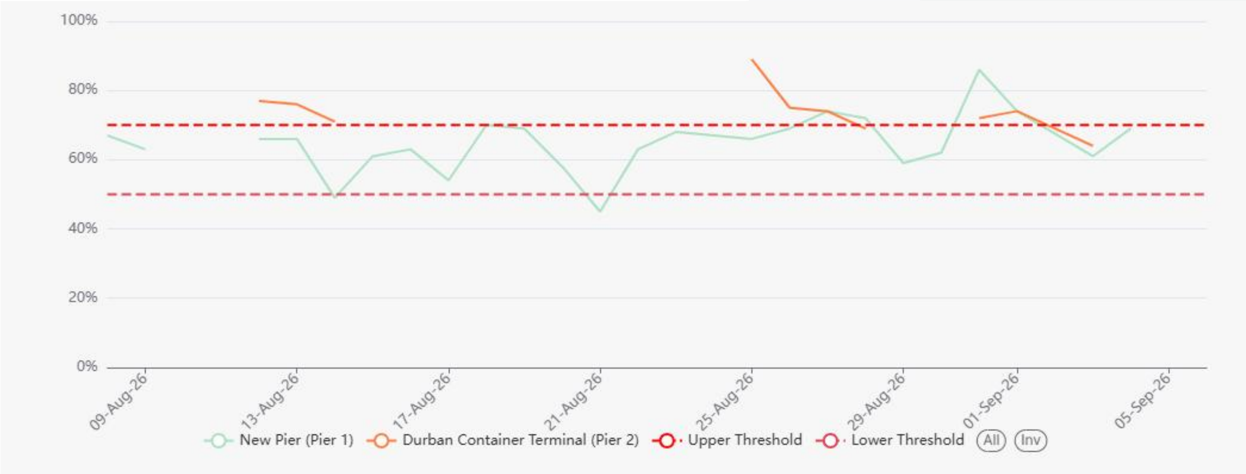
Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.5	1.7
Cape Town	FPT	0.4	2.7
Cape Town	MPT	0.0[8]	1.3[9]
Durban	DGT	5.8	5.1
Durban	Pier 1	2.7	2.5
East London	MPT	0.3	1.9
Ngqura	NCT	0.9	2.0
Port Elizabeth	PECT	1.2	1.2

Source: Calculated from Marine Traffic AIS data, 2026. Updated 08/09/2026.

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

[8] According to July 2026 data.
[9] ibid

Figure 4 – Stack occupancy in Durban, general-purpose containers (8 August to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 06/09/2026.

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 (8 August to present, day on day)

Source: Calculated using data from Transnet, 2026, and updated 06/09/2026.

b. Summary of port operations

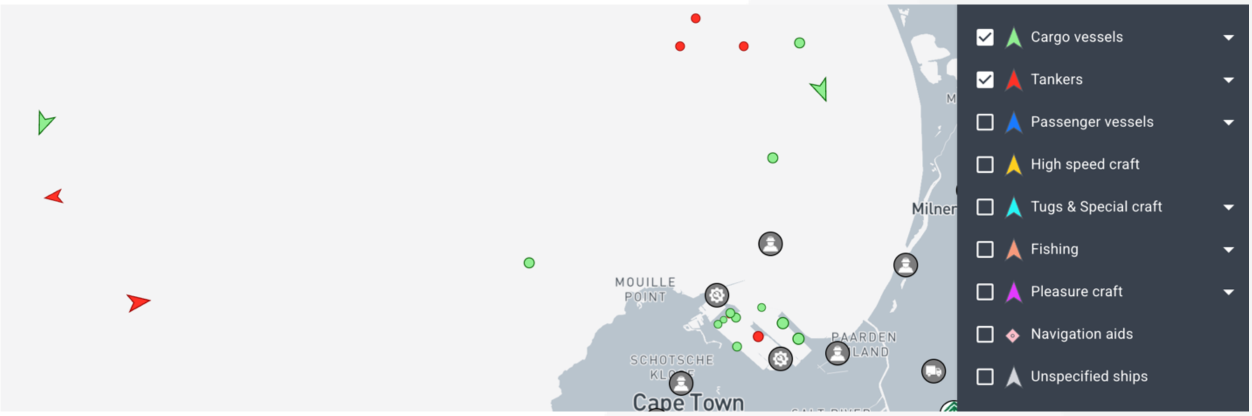
i. Cape Town

Cape Town Container Terminal reported a significant decline in waterside volumes, falling well below the target volume for the period. However, vessel turnaround times remained low, with vessels spending an average of one hour waiting at anchorage and 54 hours at berth. The terminal had strong equipment availability, with an average of eight out of nine cranes and 29 out of 32 RTGs available throughout the week. Vessel arrivals may be affected by the congestion experienced at the port of Durban.

Cape Town Multi-Purpose Terminal recorded a significant increase in waterside volumes, though this was off a low base, as the terminal reached only 15% of the target volumes. Vessels spent an average of one hour waiting at anchorage, and 85 hours at berth. The terminal had some equipment challenges with only one of three cranes in operation, along with three out of five straddle carriers, though repairs are underway.

AGL Terminal had one vessel call, experiencing significant weather delays (2.5 days). Furthermore, there were reports of significant landside congestion.

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



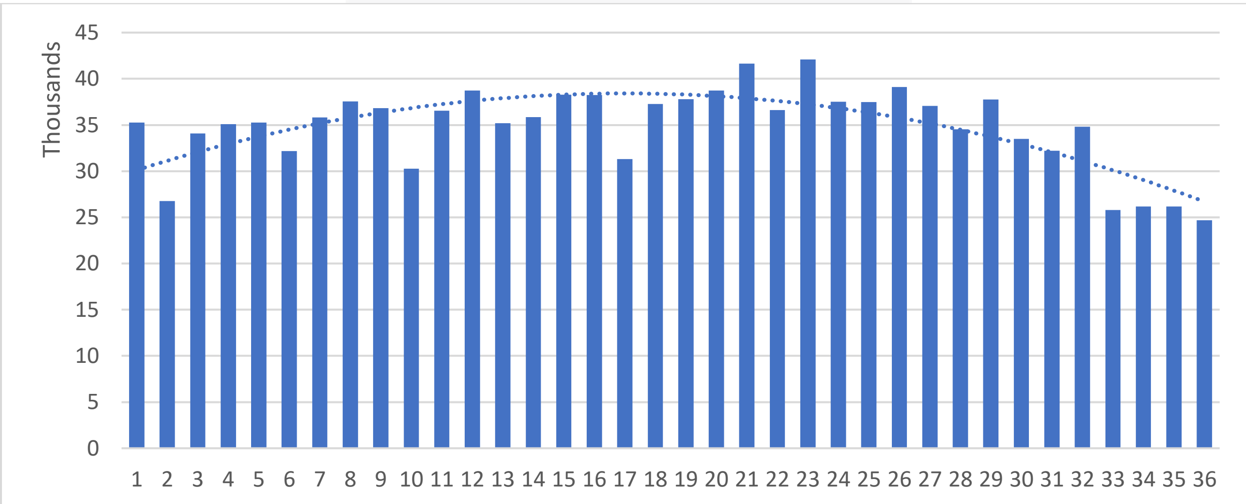
Source: Marine Traffic. Updated 06/09/2026 at 14:00.

ii. Durban

Pier 1 had a steady week, with volumes staying consistent, reaching 97% of the target volumes. Vessel turnaround times increased, with vessels spending an average of 51 hours at anchorage and 77 hours at berth. The terminal operated with an average of four out of seven cranes and 26 out of the required 25 RTGs. Operations for the next reporting period are anticipated to be impacted by additional delays from various sources, including the recently declared Force Majeure (due to power outages) and the continued congestion at DGT. The **TTT** for the week averaged **~38 minutes** (**↓ 21%**, w/w), and the average **staging time** was **~26 minutes** (**↓ 24%**).

DGT remains under severe operational pressure, notwithstanding the recovery and diversion measures currently being implemented. Waterside volumes were approximately **63% compared to this time last year**, while vessels that berthed had spent an average of around **212 hours at anchorage** and completed vessels averaged approximately **125 hours alongside**. Although the anchorage queue reduced from **10 vessels on 7 September to five by 10 September**, the underlying throughput position remains weak: DGT has handled an average of only **3,672 TEUs per day over the last four weeks**, approximately **↓30.5% below** the average of **5,286 TEUs per day** achieved during the preceding four months.

Figure 7 – Durban Gateway Terminal Weekly Throughput (Calendar week, TEUs)



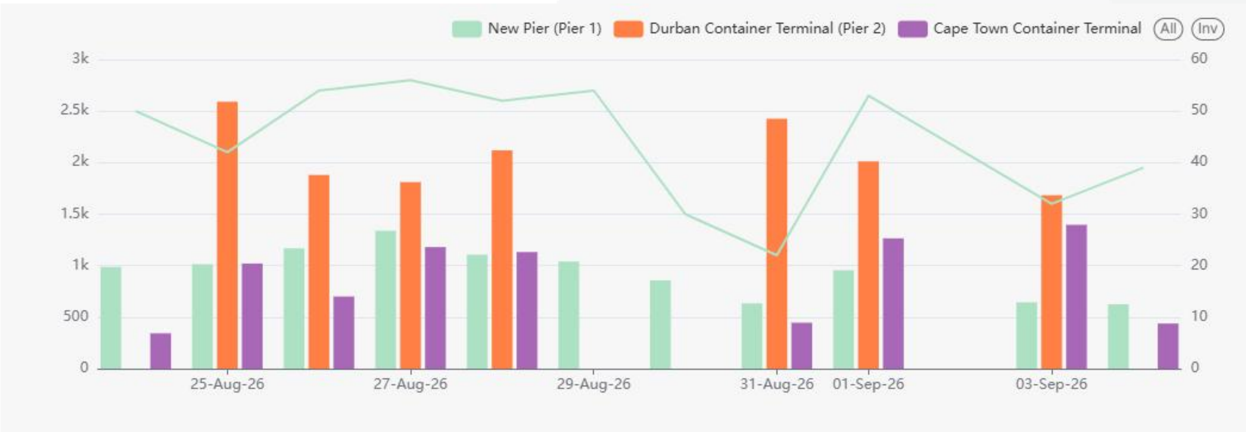
Source: Calculated from DGT.

To relieve pressure, around **11,550 containers have already been rerouted**, with further diversion and network-management strategies continuing.

Landside indicators similarly remain volatile rather than demonstrating a sustained recovery. Overall stack occupancy moved from **60.8% on 7 September to 64.4% on 9 September before easing to 63.2% on 10 September**, while road imports on hand increased steadily from **3,968 to 4,421 containers** over the same period — an increase of approximately **↑11%**. Reefer pressure also remains material, reaching **106% occupancy on 9 September and 102% on 10 September**. Gate activity has averaged around **2,147 moves per day since the start of the week**, but daily performance has fluctuated materially between **1,867 and 2,552 moves**, while rail evacuation has remained similarly uneven.

Durban Multi-Purpose Terminal recorded a strong recovery from the previous week, reporting a 158% increase in waterside volumes, exceeding the target volume by 118% (up from 45% the previous week). Vessel turnaround time remained elevated, with vessels waiting 89 hours at anchorage and 39 hours at berth. The terminal operated with three out of four cranes.

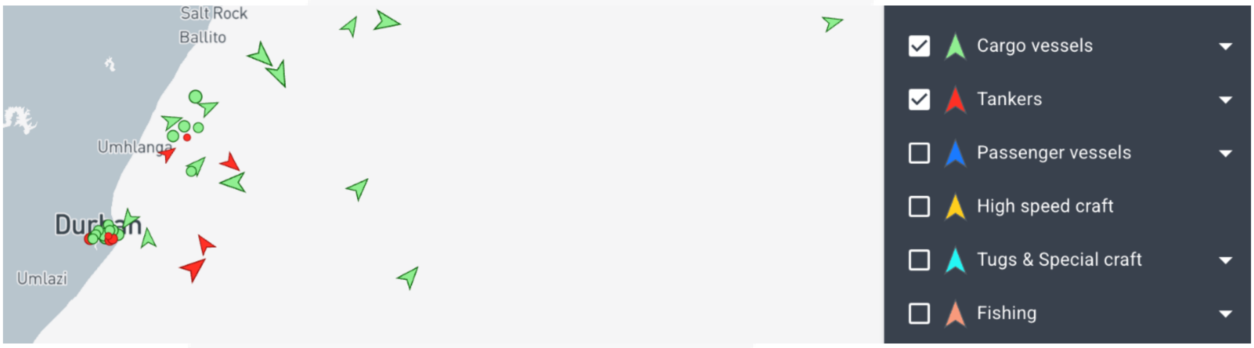
Figure 8 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 06/09/2026.

The queue of container vessels waiting outside Durban decreased this week to 23 vessels from last week's 30. On Wednesday morning (9 September), **ten** (down from last week) container vessels were waiting outside at anchorage for Durban, **six** for DGT, one for Point and **three** for Pier 1. The queue of dry (**four**) decreased, liquid (**six**) increased, and breakbulk (**two**) decreased vessels:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 06/09/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal had a stable but strong week, with no significant change in waterside volumes, moving 160% of the target volume, as NCT continues to operate as a pressure valve for the congestion experienced at the port of Durban. Vessels spent an average of 38 hours at anchorage and 87 hours at berth. The terminal appears to be handling the increased volumes. However, if an increased number of vessels are redirected, some congestion might be transferred, as the terminal reported an average of 2 vessels waiting at anchorage. In terms of equipment, the terminal's performance remained stable, with six out of eight cranes and 23 out of 30 RTGs available throughout the week.

Port Elizabeth Container Terminal continued its extraordinary run, with another increase in waterside volumes, reaching 228% of the terminal's target volumes, with a significant boost in vessel calls due to the congestion at Durban Port. Vessels spent an average of 16 hours at anchorage and 50 hours at berth. The strong performance was supported by two out of three cranes and 15 out of the required 11 straddle carriers available throughout the period.

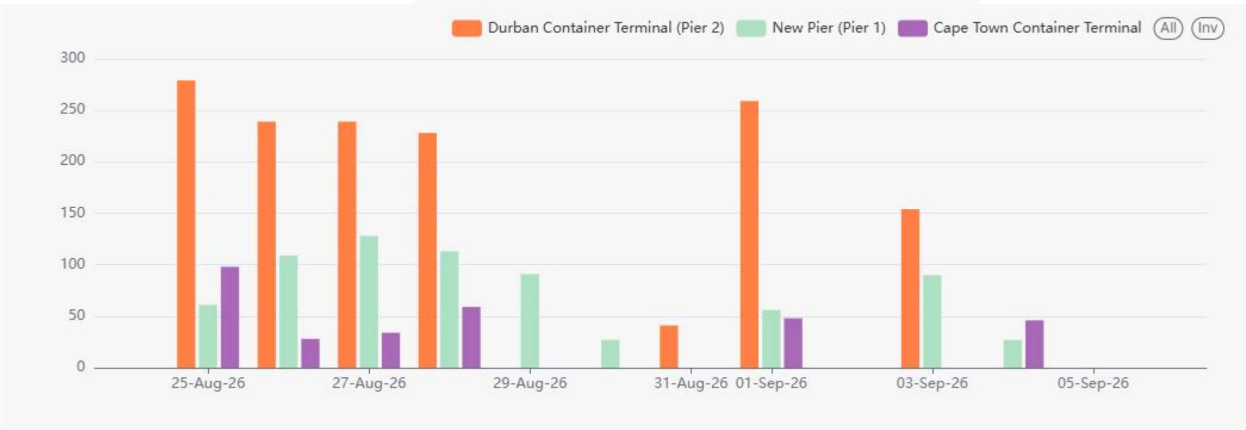
iv. Richards Bay

At RBCT, the daily average coal throughput for the week **decreased noticeably and** averaged close to **149,000 tons** (↓ **24%**, w/w) per day. With an average of **25 trains per day** being serviced, above the target of 22.

v. Transnet Freight Rail (TFR)

In the last week (*31 August to 6 September*), rail cargo on the ConCor line out of Durban was reported at **1,064** containers, down by **↓30%** from the previous week's **1,514** containers. The decline is in part due to a lack of sufficient data, and partly due to the closure of the line for maintenance, along with some overspill of congestion due to the challenges being experienced at DGT.

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



Source: Calculated using data from Transnet, 2025. Updated 06/09/2026.

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 (*31 August to 6 September*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *September 2025* was **~979,249 kg**.

Table 5 – International inbound and outbound cargo from OR Tambo

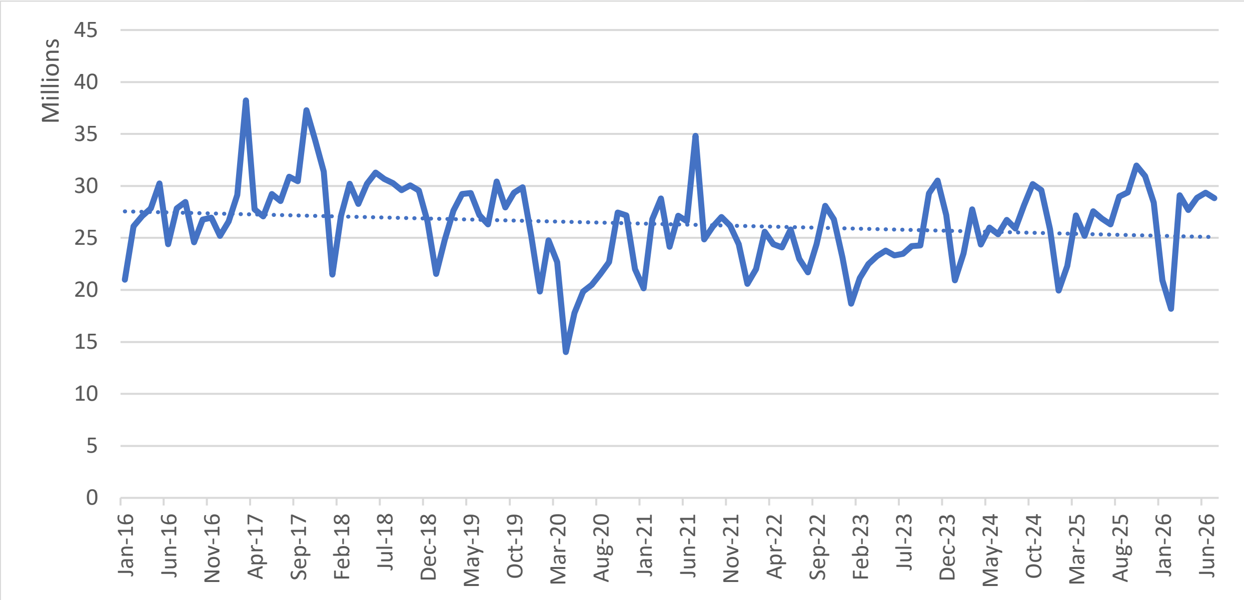
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**574,522**	**4,021,651**	**↑6%**
Volume outbound	**359,256**	**2,514,793**	**↓12%**
Total	**933,778**	**6,536,444**	**↓1%**

Courtesy of ACOC. Updated: 06/09/2026.

International inbound air cargo to ORTIA was projected to be stable this week; however, will be reconciled next week. The daily average amounted to **~574,500 kg** inbound (**↑6%**, w/w) and **~359,000 kg** outbound (**↓12%**).

The following figure shows the international air cargo flows to and from ORTIA since the start of 2016:

Figure 11 – International cargo: ORTIA (monthly, kg millions)



Calculated from ACOC. Updated: 06/09/2026.

The latest reported fuel stock days (as of Thursday afternoon, 10 September) per airport indicate:

- ORTIA: **5.3 days** (target: 5 days)
- CTIA: **6.1 days** (target: 4 days)
- Durban: **9.5 days** (target: 5 days)

The ongoing *ORTIA Freight Warehouse Refurbishment Project* will involve phased external roadway, parking-area and loading-dock repairs from **9 September through late October**, affecting multiple cargo operators across Warehouses 1–37. Temporary access restrictions will apply throughout the works, with roadway repairs causing interruptions ranging from approximately two hours to full-day closures, while affected loading docks will be subject to full access restrictions during repair and curing periods; operators have been advised to adjust loading, collection and vehicle-movement arrangements accordingly.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*31 August to 6 September)*, movements decreased considerably – by around **121 trucks a day**, as trains from KM4 to Maputo were stable (at an average of **2.25 trains per day**).

- Truck volumes through the border post decreased to **1,369 HGVs per day** (**↓9%**, w/w).
- Overall, queue times **reduced after some congestion last week** to an average of **~4.7 hours** (**↓41%**) at the border.
- The average processing times **increased slightly** to an average of **~4.4 hours** (**↑10%**) per crossing.

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

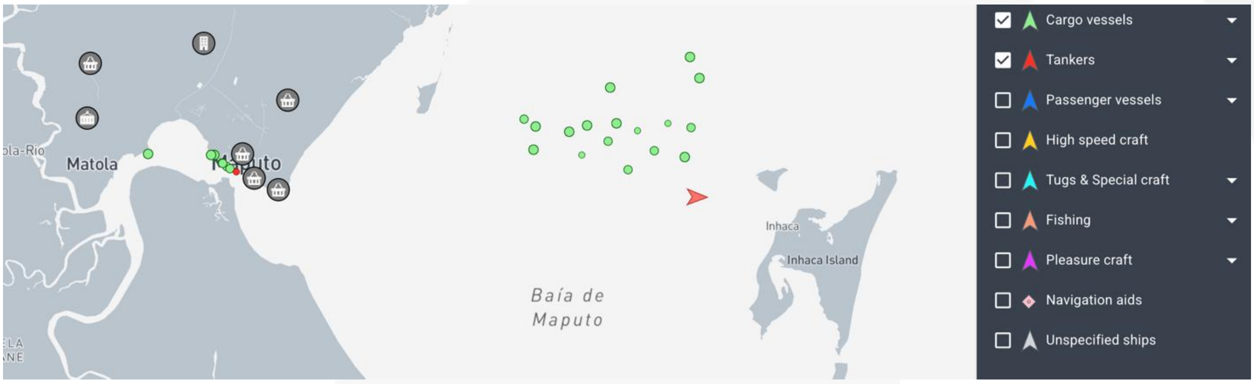
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,369	1,312	1,007	206	40	71	46	291
% (w/w)	**-9%**	**-8%**	**-11%**	**-5%**	**-11%**	**-17%**	**13%**	**1%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 06/09/2026.

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 06/09/2026 at 14:00.

b. SADC cross-border and road freight update

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

- Overall, the average queue time **increased considerably this week** – by around **two and a half hours** from last week, as transit times **increased by roughly the same magnitude**.
- The median border crossing times at South African borders increased by **two hours**, averaging **~9.5 hrs** (**↑26%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) remained mostly stable – averaging **~7 hrs** (**no change**).

1. **Mozambique – clarification sought on spare-tyre requirements:**
    a. Mozambique's Ministry of Transport has indicated that it will engage the police to clarify the application of recently introduced vehicle-safety requirements, following reports of fines relating to spare tyres.
    b. The Ministry's position is that the spare-tyre requirement applies to the main vehicle only, rather than requiring additional spare tyres for associated equipment/trailers; enforcement practice should therefore be monitored until the clarification is consistent.
2. **Zimbabwe – security warning on the Harare–Chirundu corridor:**
    a. Zimbabwean police issued a security notification on 3 September regarding criminal activity along the Lion's Den–Karoi section of the Harare–Chirundu corridor.
    b. Drivers have been advised to avoid travelling through the affected area between 18:00 and 06:00 where possible and to use recognised truck stops, following reports of criminals tampering with truck braking systems to force vehicles to stop before robbing drivers or stealing company property.
3. **Regional corridor costing – new TransAfrica Border Hub/FESARTA tool:**
    a. The TransAfrica Border Hub and FESARTA have developed a Trip Costing System allowing transporters to calculate route-specific operating costs across Southern and Eastern Africa, including distance, fuel, tyres, tolls and DRC péages, together with fixed operating costs.
    b. Originally developed for the North–South Corridor, the system has been expanded to calculate routes between towns and cities across multiple regional corridors; operators must customise their own fixed-cost assumptions and manually incorporate border-delay costs. The functionality is available to TransAfrica Border Hub members.
    c. The Hub's public platform already provides corridor information covering border charges, crossing times, toll-related costs and other operational data.

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

Table 7 – Delays[10] summary – South African borders[11] (both directions)

Border Post	Direction	HGV[12] 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	557	21.2	5.3	21.1	16,710	3,899
Beitbridge	Zimbabwe-SA	341	5.4	1.4	5.3	10,230	2,387
Groblersbrug	SA-Botswana	237	16.1	1.3	16.1	7,110	1,659
Martin's Drift	Botswana-SA	196	4.9	1.3	4.5	5,880	1,372
Kopfontein	SA-Botswana	207	8.6	1.5	8.4	6,210	1,449
Tlokweng	Botswana-SA	37	0.7	0.2	0.4	1,110	259
Vioolsdrift	SA-Namibia	30	4.7	1.5	4.4	900	210
Noordoewer	Namibia-SA	20	2.8	0.4	2.5	600	140
Nakop	SA-Namibia	30	3.9	1.1	3.5	900	210
Ariamsvlei	Namibia-SA	20	1.1	0.4	1.1	600	140
Skilpadshek	SA-Botswana	292	15.3	2.6	15.2	8,760	2,044
Pioneer Gate	Botswana-SA	88	1.9	1.3	1.5	2,640	616
Ramatlabama	SA-Botswana	168	3.0	0.4	3.0	5,040	1,176

[10] 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.
[11] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[12] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Border Post	Direction	HGV[12] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Ramatlabama	Botswana-SA	113	0.5	0.2	0.3	3,390	791
Lebombo	SA-Mozambique	1,532	4.7	1.5	4.4	45,960	10,724
Ressano Garcia	Mozambique-SA	1,431	1.2	0.2	1.2	42,930	10,017
Sum/Average		**5,299**	**6.0**	**1.3**	**5.8**	**158,970**	**37,093**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 30/08/2026.

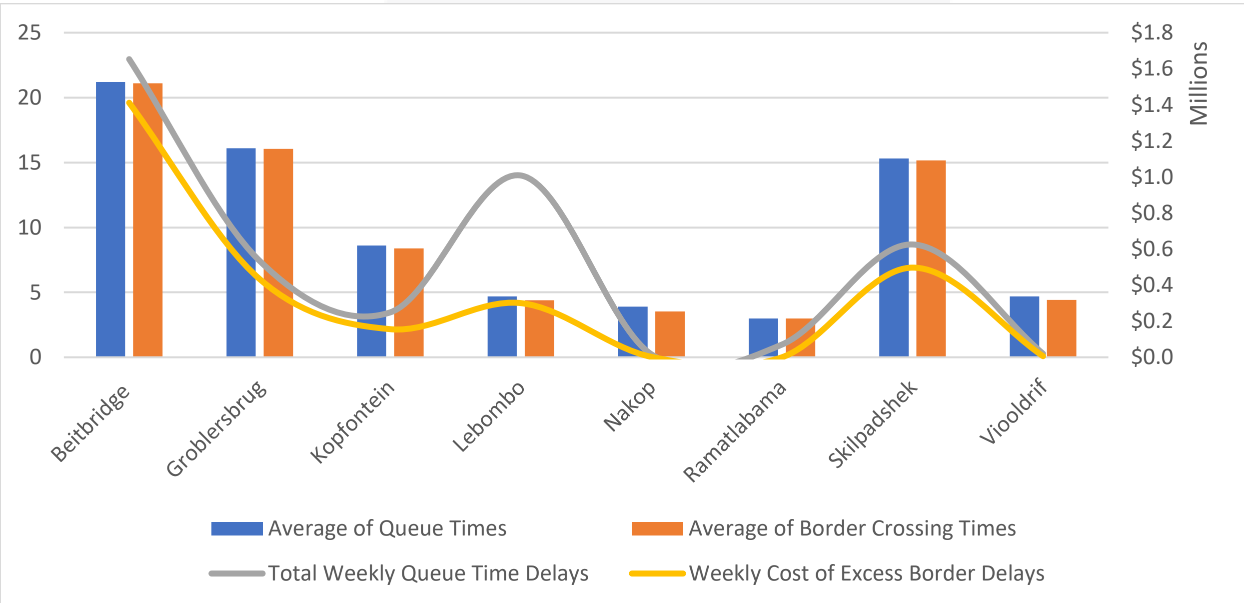
Table 8 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	7.1	1.3	6.8	9,600	2,240
Central Corridor	798	14.2	0.7	14.2	23,940	5,586
Dar Es Salaam Corridor	1,819	22.6	4.4	24.1	54,570	12,733
Maputo Corridor	2,963	3.0	0.9	2.8	88,890	20,741
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,456	17.7	3.4	18.2	103,680	24,192
Northern Corridor	2,817	1.8	0.5	1.8	92,520	21,588
WBNLD Corridor	935	4.4	0.9	4.2	28,050	6,545
Trans Cunene Corridor	100	3.1	0.9	2.9	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	21.1	1.8	21.2	3,480	812
Sum/Average	**13,551**	**9.9**	**1.6**	**10.1**	**414,540**	**96,726**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 30/08/2026.

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

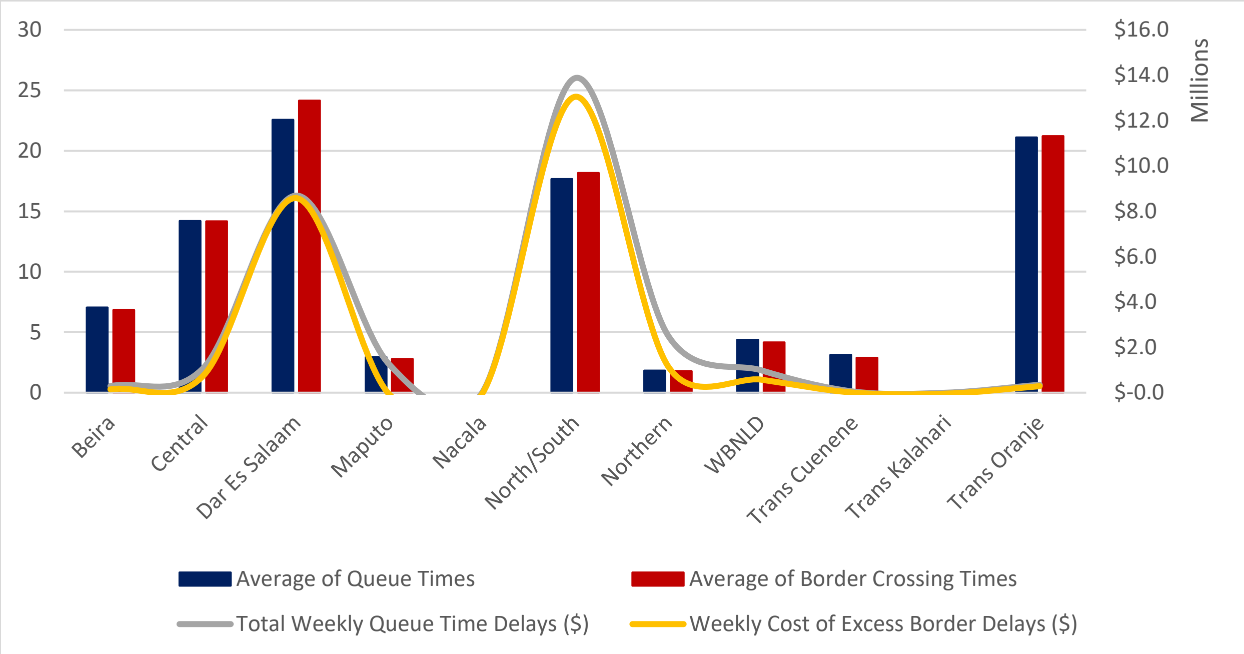
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 30/08/2026.

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 30/08/2026.

In summary, cross-border queue time averaged **~9.9 hours** (up by **~2.7 hours** from the previous week's **~7.2 hours**), indirectly costing the transport industry an estimated **$29 million** (**R465 million**). Furthermore, the week's average cross-border transit times hovered around **~10.1 hours** (up by **~3.1 hours** from the previous week's **~7.1 hours**), at an indirect cost to the transport industry of **$24.4 million** (**R389 million**). The total indirect cost for the week amounts to an estimated **~$53.5 million** (**R854 million**, up by **↑35%** from the **~R634 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.

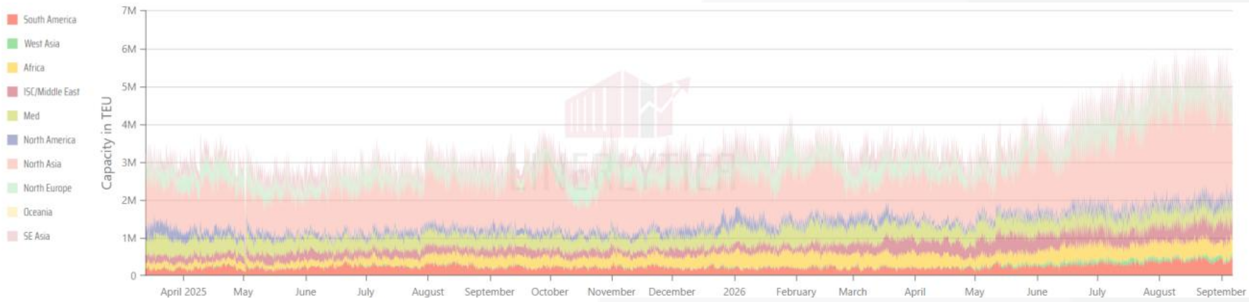
a. Global shipping industry

i. Red Sea & global industry summary

Global shipping conditions remain dominated by escalating geopolitical risk in the Middle East, with disruption across both the **Red Sea/Bab el-Mandeb and Strait of Hormuz** placing renewed pressure on energy markets, vessel routing and operating costs. The security outlook deteriorated further this week amid renewed attacks on shipping and reports that Houthi forces had seized the strategic Yemeni port of Mocha, increasing uncertainty around the southern entrance to the Red Sea. **Brent crude breached the $100/barrel mark**, settling above **$101 on Wednesday**, while higher war-risk insurance and bunker costs are materially increasing voyage economics. Singapore VLSFO prices are now more than **60% above pre-war levels**, although physical bunker availability has stabilised.

Meanwhile, worsening **Asian port congestion** is impacting **1,137 vessels** and moving approximately **4.97 million TEUs of capacity out of circulation**, contributing to a deterioration in global schedule reliability to **56.4%** and pushing average vessel delays above six days.

Figure 15 – Port Congestion by region

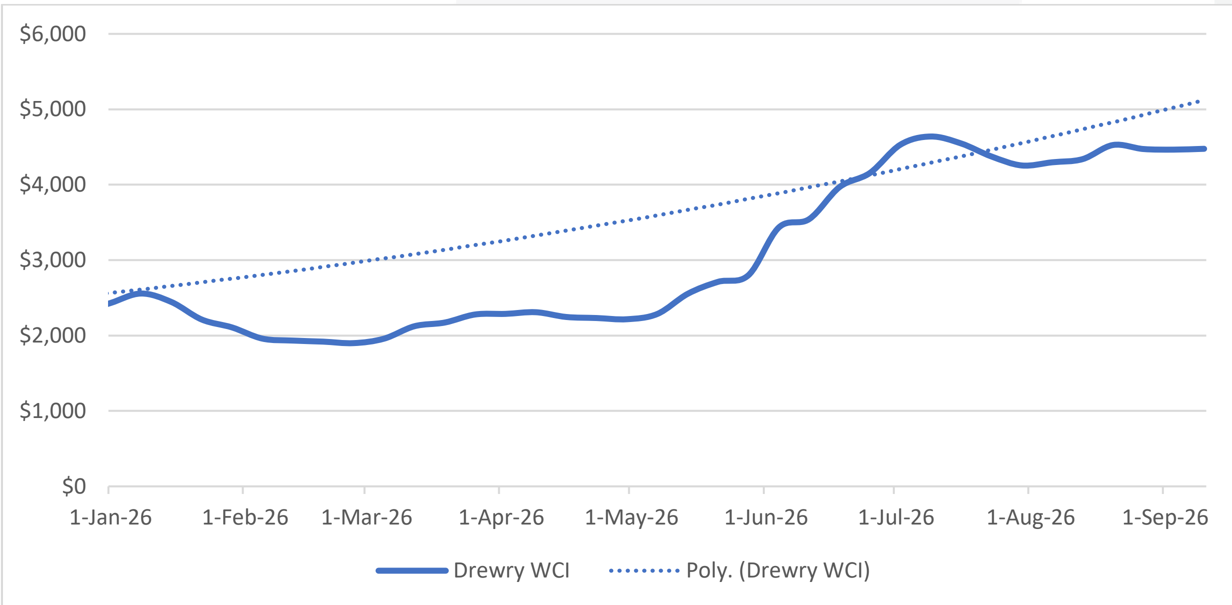


Source: [Linerlytica]

ii. **Global container freight – and charter rates, and carrier earnings**

Drewry's **World Container Index (WCI) remained broadly stable for a second consecutive week at $4,476/40ft**, although underlying trade lanes continued to diverge: Transpacific rates edged higher, while Asia–Europe rates declined, including a **3% fall on Shanghai–Genoa and 2% on Shanghai–Rotterdam**. With demand subdued but Asian port congestion and carrier capacity management—including additional blank sailings—continuing to constrain effective supply, **Drewry expects overall spot rates to remain broadly stable in the coming week**.

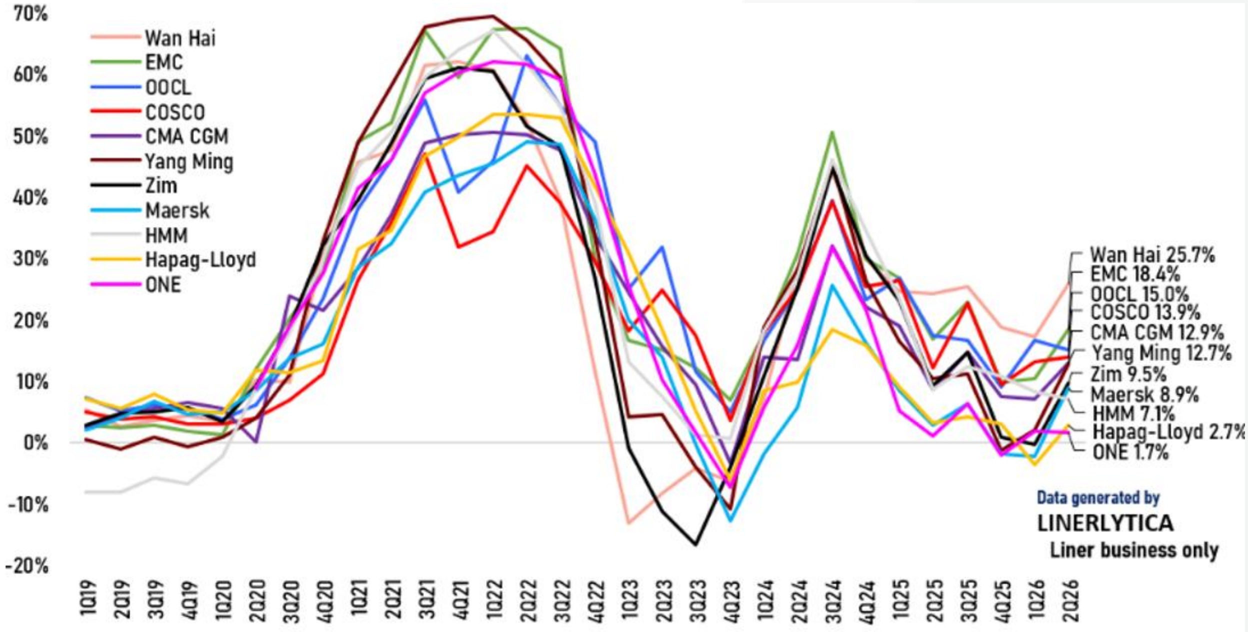
Figure 16 – World Container Index (Drewry)



Source: [Drewry]

Carrier profitability strengthened materially in **Q2 2026**, with the average EBIT margin across the 11 major carriers surveyed rising to **↑10.4%**, from **↑4.8% in Q1**. A further sharp improvement is expected in **Q3**, supported by a **↑37% quarter-to-date increase in the CCFI**, with average EBIT margins projected to exceed **↑25%**, potentially marking the strongest quarterly performance since 2024.

Figure 17 – EBIT margin comparison (ranked by Q2 performance)

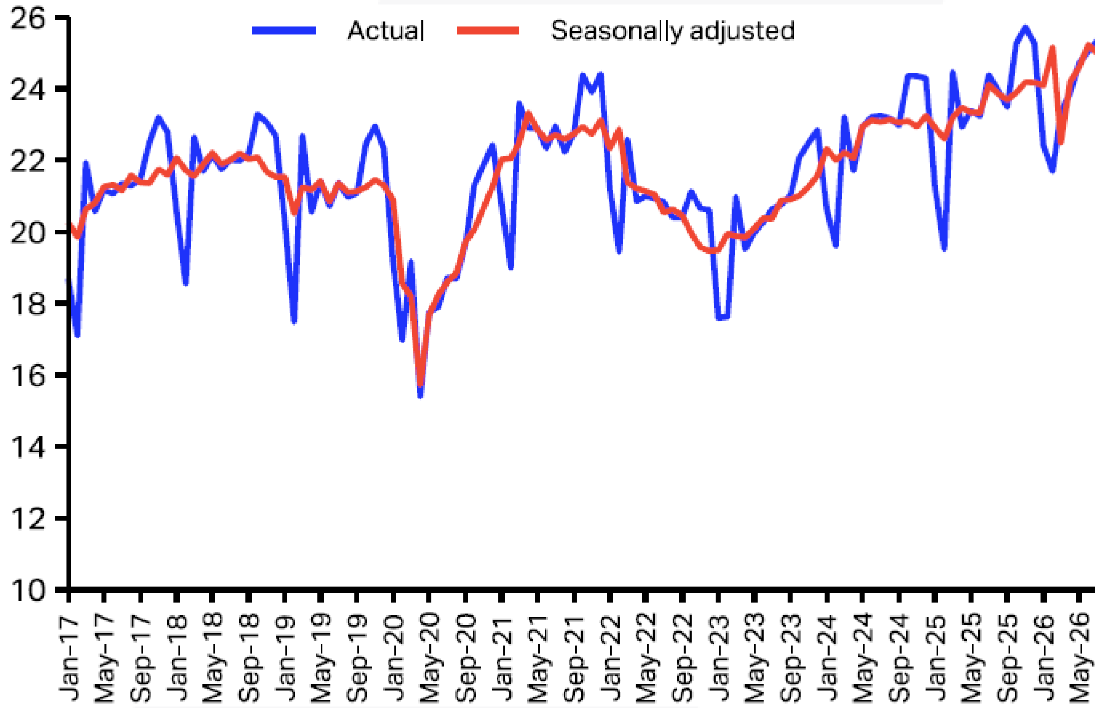


Source: Linerlytica

b. Global air cargo industry

For July, IATA's latest *"Air Cargo Market Analysis"* indicates that global air cargo demand remained positive in July, with **industry-wide cargo tonne-kilometres** (CTKs) **increasing** by **↑3.9%** (y/y), while international CTKs rose by a stronger **↑4.7%**. Capacity growth lagged demand, with global **available cargo tonne-kilometres** (ACTKs) **increasing by ↑1.7%**, lifting the industry cargo load factor by **↑1%** to **46%** and indicating a modest tightening in the demand-supply balance.

Figure 18 – Industry CTK (billions)



Source: IATA

Dedicated freighter traffic remained the principal growth driver, increasing **↑13.9%** (y/y), while belly-hold CTKs declined by **↓7%**, partly reflecting disruptions to passenger operations. African carriers recorded comparatively modest CTK growth of **↑1.1%**, against a **↑4.1% increase in ACTKs**, causing their load factor to fall **↓1.4%** to **45.8%**. International African traffic showed the same **↑1.1%** CTK growth, while the **Africa–Asia corridor contracted sharply**, contributing to weaker regional performance.

The latest weekly data from WorldACD show that global air cargo demand remained firm in August, with worldwide chargeable weight increasing by approximately **5%** (y/y), broadly maintaining July's growth rate. Pricing also remained elevated, with average worldwide rates **↑22% higher** (y/y), although this represents a continued moderation from the increases recorded earlier in the year; average spot rates reached **$3.36/kg**, up **↑28%** (y/y) but around **↓9% below** their April–June average.

Figure 19 – Capacity, chargeable weight and rates (last two to five weeks)

Origin Regions last 2 to 5 weeks	Capacity[1]			Chargeable weight[1]			Rate[1]		
WORLD ACD	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-1%	+5%		+6%	+6%		-3%	+17%
Asia Pacific		+2%	+3%		+4%	+4%		-0%	+20%
C. & S. America		-0%	+6%		+3%	+5%		+2%	+10%
Europe		+0%	+1%		-5%	+6%		+2%	+23%
M. East & S. Asia		+1%	+2%		+0%	+5%		-0%	+47%
North America		+0%	+4%		-0%	+6%		-0%	+21%
Worldwide		**+1%**	**+2%**		**+1%**	**+5%**		**+1%**	**+22%**

Source: WorldACD

A notable divergence remains on the Hong Kong–Europe corridor, where August tonnage was **30% lower year-on-year** following changes to EU *de minimis* import rules. However, volumes recovered 3% week-on-week in week 35, suggesting the decline may be stabilising.

ENDS[13]

[13] ***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.*