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# Cargo Movement Update #299[1]

## *Date: 13 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)** | 42,851 | 48,819 | **91,670** | 36,698 | 41,809 | **78,507** | ↑17% |
| **Air Cargo (tons)** | 3,599 | 2,861 | **6,459** | 3,788 | 2,848 | **6,636** | ↓3% |

## Monthly Snapshot

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

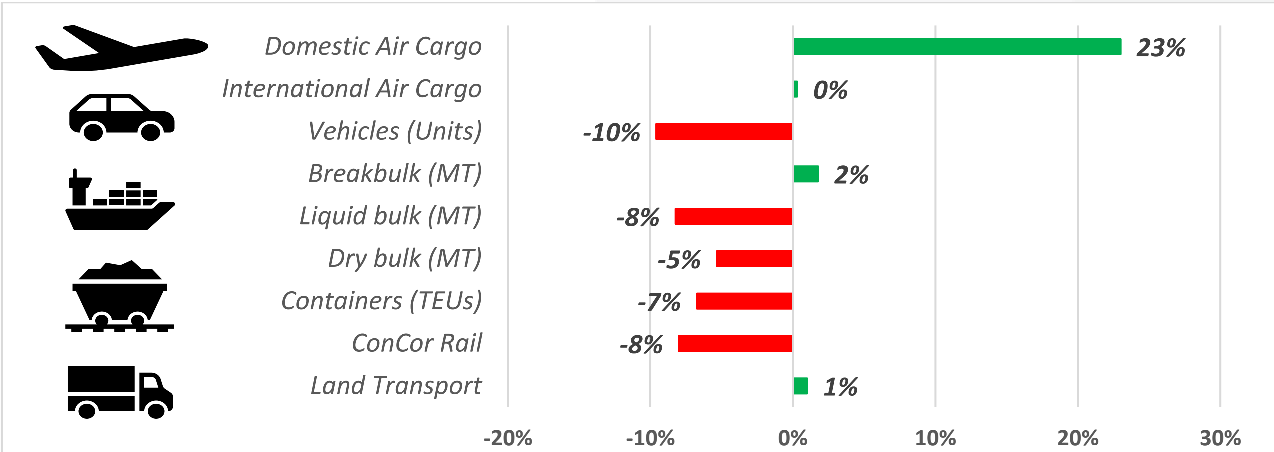
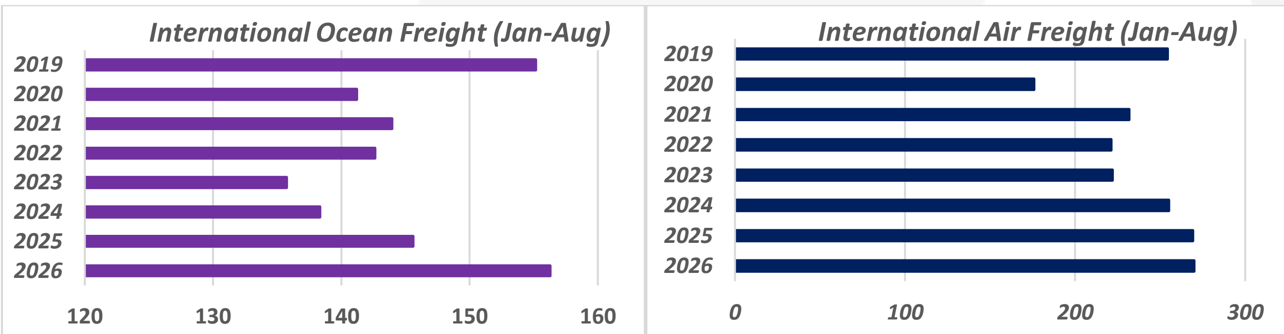



*Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)*




## Key Notes

- An average of **13,096 TEUs** was handled per day, with **12,513 TEUs** projected for next week.
- **TNPA August**: **Containers**: **↓7%** (m/m); **↑4.9%** (YTD). **Bulk**: **↓5%** (m/m); **↑7.6%** (YTD). **Vehicles**: **↑15%**.
- **DGT latest**: **~4,742 TEUs/day** (**↑35%**, w/w). Gate & Rail evacuation improved but remains below averages.
- Rail cargo handled out of Durban was reported at **1,080** containers, up by ↑1% versus last week.
- Cross-border queue: **↓3.1 hrs**; transit: **↓3.7 hrs**; SA borders: **~7.5 hrs** (**↑21%**); SADC: **~6.3 hrs** (**↓10%**).
- Global port congestion remains a concern (esp. around SE-Asia); Shanghai/Ningbo: **2.14** *queue-to-berth* ratio.

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[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *299th* 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: August vs. August.
[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 **13,096 TEUs** was handled daily, an increase from **11,577 TEUs** the previous week.

**DGT update:** The terminal recorded its strongest weekly waterside performance since early August, with volumes increasing by **↑35%** to an average of **4,742 TEUs per day**, equivalent to around **85% of estimated target volumes**. However, the backlog remains material and operating conditions continue to fluctuate: the anchorage queue ranged between **six and nine vessels**, while improved yard inventories have not yet been matched by normal landside throughput, with average gate moves still around **17% below** the pre-crisis average and rail evacuation approximately **51% below** its earlier benchmark.

Port operations were overall positive, with most terminals showing an increase in operations, and for those reporting a decline in operations, they still outperformed their target volumes. In addition to the increase in volumes at DGT, Pier 1 also showed a strong performance, as the terminal worked to support clearing the backlog at the terminal, as was the case in Durban MPT. In the Western Cape, both CTCT and MPT recorded an increase in waterside volumes, in spite of some weather delays towards the end of the week. In the Eastern Cape, both terminals recorded a decline in volumes, though both terminals moved volumes well above the target volumes. It is encouraging to see the terminals working above planned capacity to support clearing the backlog.

Container shipping is showing a **measured but increasingly significant return to the Red Sea/Suez route**, despite continued security risks around Yemen and the Bab al-Mandeb. *Linerlytica* reports that COSCO and OOCL are joining CMA CGM in restoring Suez transits, while Maersk and Hapag-Lloyd are also expanding their use of the corridor. Consequently, the share of global container capacity still diverted around the Cape of Good Hope has fallen to a **two-year low of 4.6%**. *Sea-Intelligence* estimates that Red Sea routing is now approximately **27% normalised** for September, although the recovery remains uneven. Overall, the trend points towards a **gradual rather than wholesale restoration** of Bab al-Mandeb/Suez transits. Elsewhere, global port congestion remains a concern, as nearly **4 million TEU** (or **11.5% of global fleet capacity**) is currently stuck. The main areas remain around Southeast Asia, with Shanghai/Ningbo currently sitting with a **2.14** *queue-to-berth* ratio.

The reconciled figures for last week's international inbound air cargo to ORTIA amounted to the following daily averages: inbound **~514,000 kg** (**↓5%**, w/w) and outbound **~409,000 kg** (**↑0.5%**). Latest figures were not yet available and will be communicated next week.

Concerning consolidated monthly stats, international air cargo volumes remained broadly stable in August, increasing by **↑2%** (m/m) but only marginally by **↑0.3%** (y/y). Johannesburg and Durban both recorded monthly increases of **↑4%**, with Durban remaining particularly strong at **↑14%** (y/y), while Cape Town weakened materially, declining by **↓8%** (m/m) and **↓14%** (y/y).

Concerning domestic air cargo, volumes increased strongly in August, rising by **↑18%** (m/m) and **↑23%** (y/y). Cape Town recorded the sharpest growth at **↑47%** (m/m) and **↑54%** (y/y), followed by Johannesburg at **↑11%** (m/m) and **↑15%** (y/y), while Durban weakened, declining by **↓25%** (m/m) and **↓16%** (y/y).

International air cargo activity softened marginally in the latest week, with **global volumes and capacity both declining by 1%** (w/w), although demand remained **↑7% above last year**. Rates remained firm at around **$3.00/kg**, while oil prices above $100/barrel create additional upside risk for aviation fuel surcharges and freight pricing.

On the N4 corridor, movements decreased for a second consecutive week – by around **124 trucks a day**, as trains from KM4 to Maputo were stable (at an average of **2.5 trains per day**). Truck volumes through the border post decreased to **1,245 HGVs per day** (**↓10%**, w/w). Overall, queue times **increased slightly** to an average of **~5.6 hours** (**↑19%**) at the border. The average processing times **also increased** – to an average of **~5.4 hours** (**↑23%**) per crossing.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts decreased by **↓2.9%** (m/m) during August. Northbound traffic (Eastbound for Lebombo) increased most notably at **Kopfontein** (**↑8%**), with considerably decreased volumes at **Lebombo** and **Ramatlabama** (**↓6%** and **↓5%**). Southbound traffic (Westbound for Lebombo) increased at **Ramatlabama** (**↑7%**) and Beitbridge (**↑6%**) – with the most notable Southbound movement to take note of being a **↓25%** reduction at Kopfontein.

Weekly land border crossing figures in the SADC region show that the average queue time **decreased considerably this week** – by around **three hours** from last week, as transit times **decreased 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) also decreased (by about **three-quarters of an hour**) – averaging **~6.3 hrs** (**↓10%**). This week, on average, **only one** SADC border post took a day or more to cross, namely Kasumbalesa (taking around **five days** to cross from the **Zambian side**).

Cross-border developments this week include **(1)** the DRC introducing restrictions on commercial vehicle pre-clearance, requiring imported goods to be physically present at customs facilities before manifest registration, **(2)** a temporary scanner failure at Chirundu that resulted in northbound truck queues exceeding 6 km before operations returned to normal, and **(3)** a short-lived ZIMRA online portal disruption that affected transporter access before being resolved later in the day.

Finally, the latest TNPA statistics reinforce a now familiar picture: South Africa's port system has recovered materially from the lows of recent years, but the recovery remains uneven and fragile. Through August, total bulk cargoes are up **↑7.6%** (y/y) **YTD**, while container throughput remains **↑4.9% higher YTD**. However, the container recovery has lost considerable momentum over the past two months: August volumes fell **↓7% (m/m)** and **↓7% (y/y)** to **382,755 TEUs**, reflecting in particular the recent operational difficulties at DGT. Transnet's 2025/26 results similarly point to improvement, with revenue rising **7.1% to R88.6 billion** and the Group returning to a **R4.6 billion profit**, although the reporting period ended in March and the DGT transaction materially supported the profit. [6]The central challenge therefore remains unchanged: consolidate the operational recovery while accelerating the structural investment, reform and capacity improvements needed to reach sustainable performance targets.

[6] Moneyweb. 10/09/2026. TRANSNET RELEASES AUDITED ANNUAL FINANCIAL STATEMENTS FOR THE FINANCIAL YEAR ENDED 31 MARCH 2026 WITH AN UNMODIFIED AUDIT OPINION.

# 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 7 to 13 September (measured in TEUs)*

| 7-day flow reported (07/09/2026 – 13/09/2026) | | | |
|---|---|---|---|
| **Terminal** | **Daily average** | **Weekly total** | **% (w/w)** |
| **Durban Gateway Terminal (Previously Pier 2)** | 4,742 | 33,195 | ↑35% |
| **New Pier (Pier 1)** | 1,994 | 13,959 | ↑4% |
| **Cape Town Container Terminal** | 2,083 | 14,582 | ↑55% |
| **Ngqura Container Terminal** | 2,625 | 18,375 | ↓5% |
| **Port Elizabeth Container Terminal** | 561 | 3,927 | ↓31% |
| **Other** | 1,090 | 7,632 | ↑28% |
| **Total** | **13,096** | **91,670** | ↑17% |

*Source: Calculated from TPT, 2026. Updated 13/09/2026.*

An average of **~13,096 TEUs** (↑17%) was handled per day for the last week (*7 to 13 September, Table 2*). Consequently, throughput was above the projected average of **~12,513 TEUs** (↑5% actual versus projected). For the coming week, a decreased average of **~12,513 TEUs** (↓25%) is predicted to be handled (*14 to 20 September*, *Table 3*).

*Table 3 – Container Ports – Weekly flow projected for 14 to 20 September (measured in TEUs)*

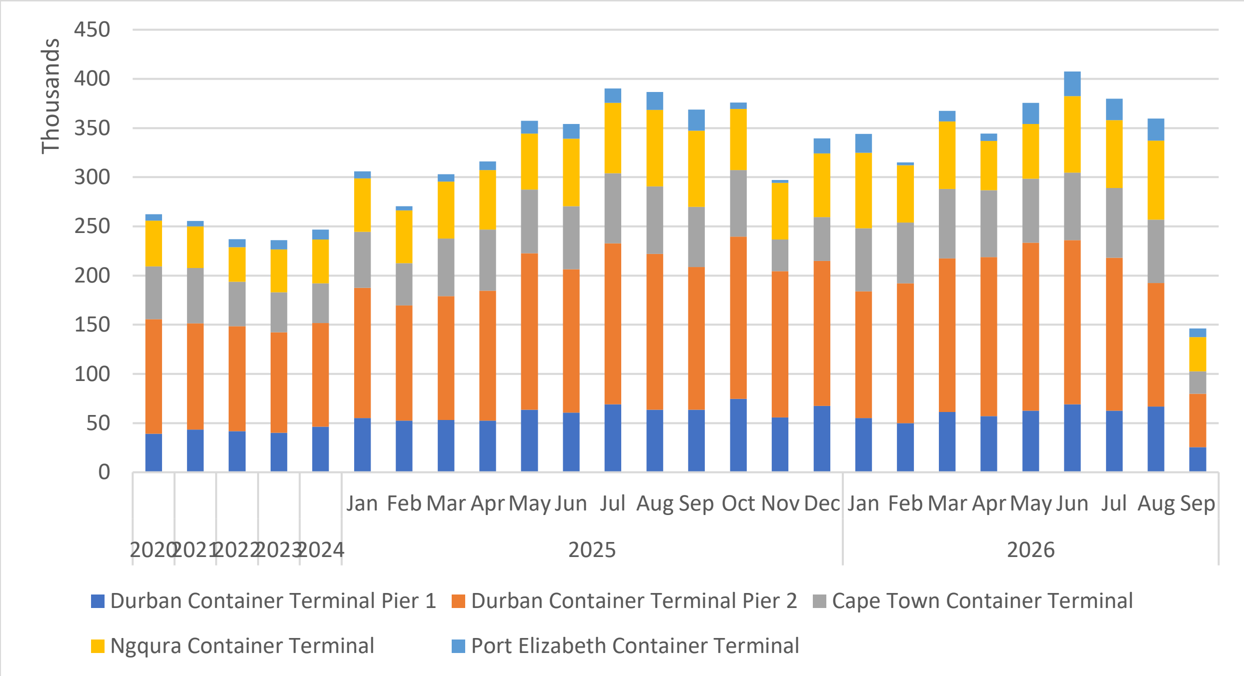
| 7-day flow projected (14/09/2026 – 20/09/2026) | | | |
|---|---|---|---|
| **Terminal** | **Daily average** | **Weekly total** | **% (w/w)** |
| **Durban Gateway Terminal (Previously Pier 2)**[7] | 5,571 | 39,000 | ↑17% |
| **New Pier (Pier 1)** | 1,973 | 13,808 | ↓1% |
| **Cape Town Container Terminal** | 2,052 | 14,366 | ↓1% |
| **Ngqura Container Terminal** | 1,741 | 12,186 | ↓34% |
| **Port Elizabeth Container Terminal** | 355 | 2,485 | ↓37% |
| **Other** | 821 | 5,744 | ↓25% |
| **Total** | **12,513** | **87,589** | ↓4% |

*Source: Calculated from TPT, 2026. Updated 13/09/2026.*

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 13/09/2026.*

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*

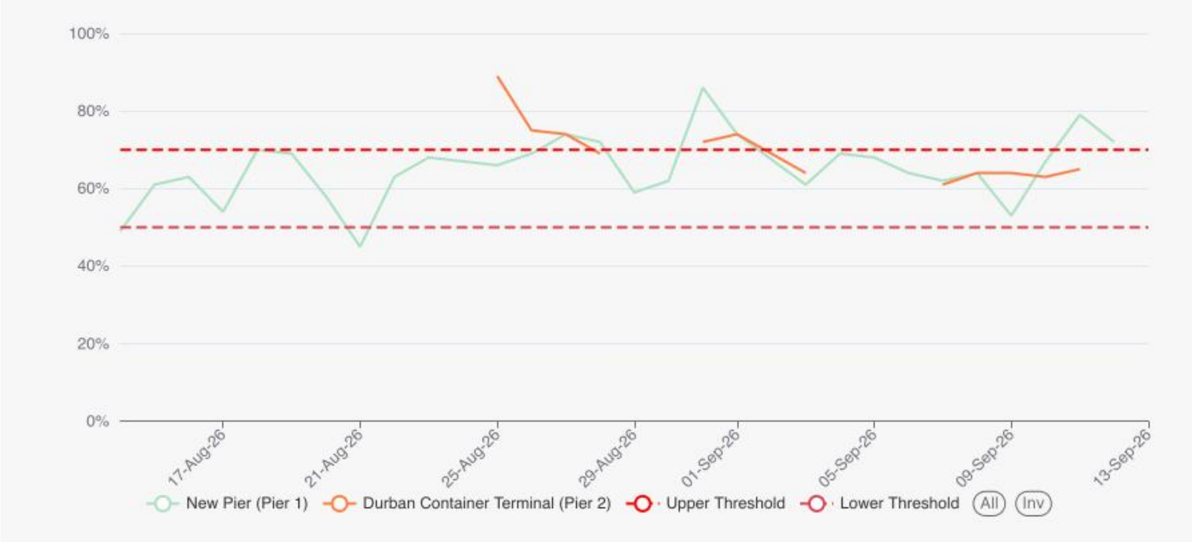
| Port | Terminal | Average Time at Anchorage (days) | Average Time at Berth (days) |
|---|---|---|---|
| Cape Town | CTCT | 0.5 | 1.7 |
| Cape Town | FPT | 0.4 | 2.7 |
| Cape Town | MPT | 0.0[8] | 1.3[9] |
| Durban | DGT | 5.8 | 2.7 |
| Durban | Pier 1 | 2.7 | 2.5 |
| East London | MPT | 0.3 | 1.9 |
| 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 data in July 2026.
[9] ibid

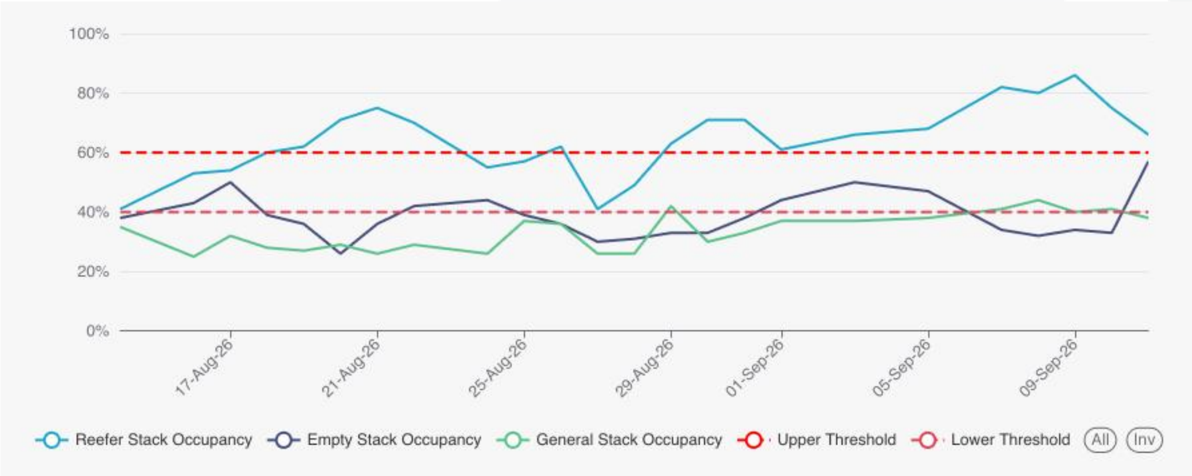
*Figure 4 – Stack occupancy in Durban, general-purpose containers (15 August to present; day on day)*




*Source: Calculated using data from Transnet, 2026, and updated 13/09/2026.*

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 (15 August to present, day on day)*




*Source: Calculated using data from Transnet, 2026, and updated 13/09/2026.*

### b. TNPA: August update

TNPA has released consolidated port statistics for August[10], with the figures showing that:

- Container throughput totalled **382,755 TEUs**, which is down by **↓7%** (m/m) and by the same level (**↓7%**, y/y).
- Total bulk cargo totalled **17,945 million tonnes**, which is down by **↓5%** (m/m), but approximately similar (**↑0.2%**) to last year in August. For the year-to-date, and illustrated by *Figure 2*, bulk cargoes are up by **↑7.6%** (y/y), which is encouraging.

[10] Transnet. 2026. Port statistics.

- Vehicle throughput totalled **96,945 units**, which is up by ↑**15%** (m/m) and by ↑**19%** (y/y).

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

*Table 5 – TNPA – Monthly volume and growth: August 2026*

| | July | August | Movement | % change |
|---|---|---|---|---|
| **Containers (TEUs)** | **411,056** | **382,755** | **-28,301** | **-7%** |
| Landed | 214,743 | 201,008 | -13,735 | -6% |
| Shipped | 196,313 | 181,747 | -14,566 | -7% |
| **Dry bulk (MT)** | 15,649,544 | 14,730,753 | -918,791 | -6% |
| **Liquid bulk (MT)** | 2,718,142 | 2,583,193 | -134,949 | -5% |
| **Breakbulk (MT)** | 561,027 | 630,744 | 69,717 | 12% |
| **Vehicles (Units)** | 84,646 | 96,945 | 12,299 | 15% |
| **Total cargo (excl. Vehicles)** | **18,928,713** | **17,944,690** | **-984,023** | **-5%** |

*Source: Calculated from TNPA, updated 10/09/2026.*

The main categories – containers and bulk – throughput levels are down versus last year, and have not increased in comparison to pre-pandemic numbers of 2019:

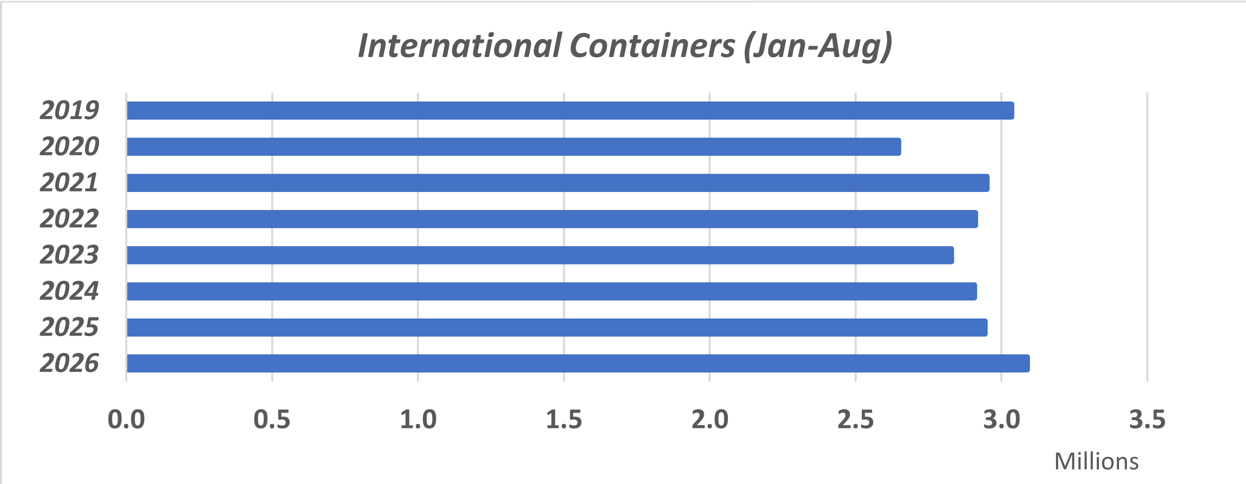
*Table 6 – TNPA – Cyclical volume and growth: August 2019, 2025, and 2026*

| | 2019 | 2025 | 2026 | Growth: '19-'26 | Growth: '25-'26 |
|---|---|---|---|---|---|
| **Containers (TEUs)** | **447,072** | **410,384** | **382,755** | **-14%** | **-7%** |
| Landed | 228,134 | 212,336 | 201,008 | -12% | -5% |
| Shipped | 218,938 | 198,048 | 181,747 | -17% | -8% |
| **Dry bulk (MT)** | 14,766,987 | 14,474,082 | 14,730,753 | 0% | 2% |
| **Liquid bulk (MT)** | 3,431,284 | 2,857,081 | 2,583,193 | -25% | -10% |
| **Breakbulk (MT)** | 439,036 | 575,405 | 630,744 | 44% | 10% |
| **Vehicles (Units)** | 78,742 | 81,690 | 96,945 | 23% | 19% |
| **Total cargo (excl. Vehicles)** | **18,637,307** | **17,906,568** | **17,944,690** | **-4%** | **0%** |

*Source: Calculated from TNPA, updated 10/09/2026.*

Similar to *Figure 2*, the following table illustrates the year-to-date container throughput, which, despite the reduction in August, is still up by ↑**4.9%** (y/y):

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




*Source: Calculated from TNPA, updated 10/09/2026.*

### c. Summary of port operations

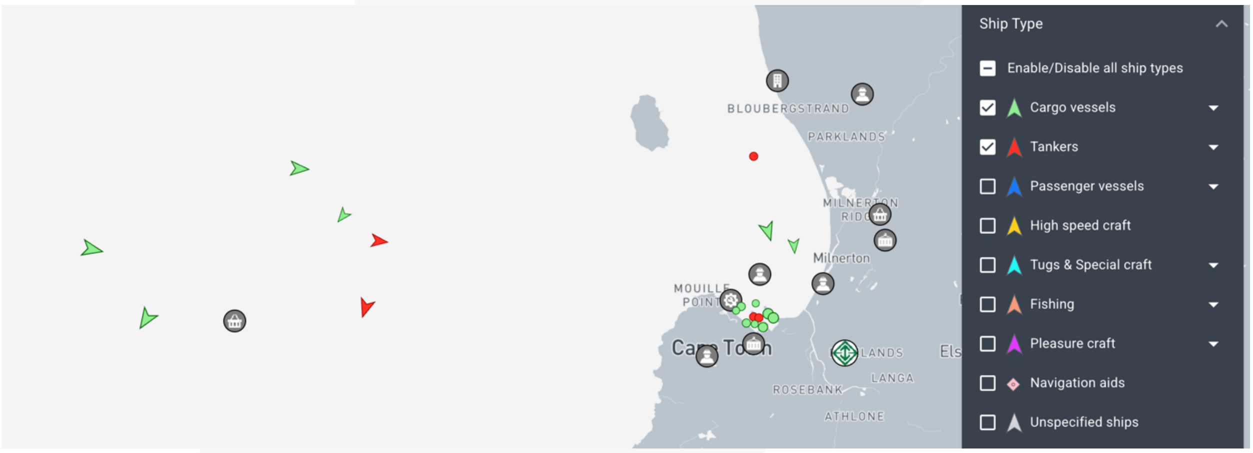
#### i. Cape Town

Cape Town Container Terminal reported a strong recovery, with a 55% increase in waterside volumes, reaching 102% of the target volume. Vessel turnaround time increased, with 17 hours at anchorage and 52 hours at berth, with an average of just one vessel waiting at anchorage. This strong performance was in spite of weather delays being reported mid-week. Terminal operations were supported by seven out of nine cranes and 29 out of 32 RTGs.

Cape Town Multi-Purpose Terminal reported a significant increase in waterside volumes, with the terminal reaching only 67% of its target volumes. The terminal had two vessel calls through the week, with one still in operation towards the end of the week, with the vessels spending an average of 29 hours waiting at anchorage.

AGL Terminal received two vessels through the week, spending 45 hours at anchorage and 18 hours at berth.

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



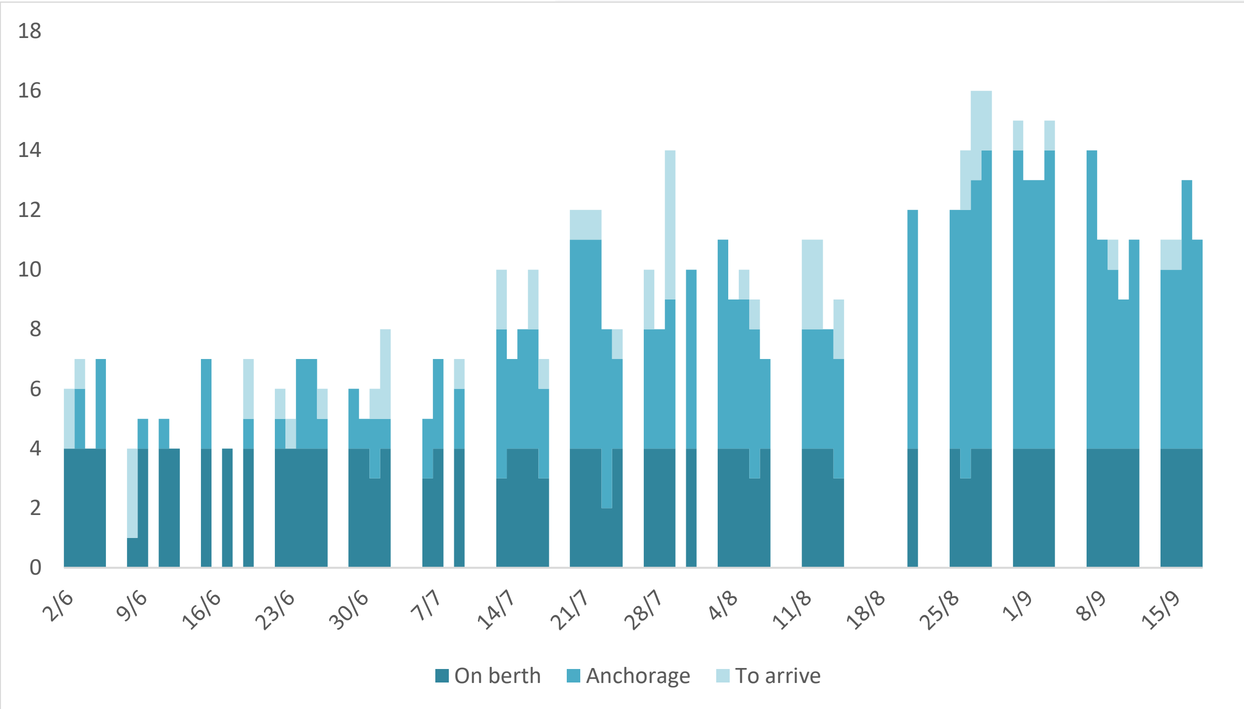

*Source: Marine Traffic. Updated 13/09/2026 at 14:00.*

### ii. Durban

Pier 1 had a stable week, with a minor increase in performance, with the terminal reaching their target volume, in spite of low crane availability, reporting an average of three out of seven cranes in operation, though the terminal operated with a full complement of RTGs. Vessel turnaround times increased from the previous reporting period, with vessels spending an average of 86 hours at anchorage and 92 hours at berth. Transnet Port Terminals formally lifted the Force Majeure declaration at Pier 1 on 9 September. The **TTT** for the week averaged **~42 minutes** (**↑11%**, w/w), and the average **staging time** was **~23 minutes** (**↓12%**).

**DGT** showed a meaningful increase in waterside volumes, with a **↑35% increase**, reaching around **85% of the terminal's estimated target volumes** (compared with the same period last year), representing the strongest weekly performance since early August. Waterside moves averaged **4,742 TEUs per day**. Despite the improved performance, the congestion backlog remains substantial, with vessels still experiencing extended anchorage and berth times, while the daily anchorage queue remained volatile at **six vessels on 14–15 September, nine on 16 September and seven on 17 September**:

*Figure 8 – Durban Gateway Terminal: Vessel counts on berth, at anchorage, to arrive (as of 17 September)*




*Source: Calculated from DGT*

On the landside, **road imports on hand declined materially from 4,339 to 2,851 containers** between 14 and 17 September (**↓34%**), while rail containers on hand fell from **302 to 133** (**↓56%**). Overall stack occupancy consequently declined from **63.3% to 58.0%**, although it reached a low of **54.5% on 16 September** before increasing the following day again. Reefer stack occupancy moved from **63.3% to 84%, then 66% and 71%** across the four reporting days. Gate activity averaged approximately **2,351 moves per day**, ranging from **1,894 to 2,783 moves**, while rail evacuation remained uneven at **310, 159, 118 and 343 containers per day**, respectively. These still remain significantly lower than the average across the 2 months before the crisis hit, namely gate moves of **2,847 moves per day** and rail evacuation of **477 containers per day**.

Durban Multi-Purpose Terminal continued its strong run, with volumes up by 38% and reaching 164% of their target. Time at anchorage fell to 57 hours, while berth time increased to 129 hours, with an average of one vessel waiting at anchorage. The terminal operated with an average of three out of four cranes throughout the week.

*Figure 9 – 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 13/09/2026.*

The queue of container vessels waiting outside Durban increased this week to 25 vessels from last week's 23. On Wednesday morning (16 September), **eleven** (up from last week) container vessels were waiting outside at anchorage for Durban, **nine** for DGT, **one** for Point and **one** for Pier 1. The queue of dry (**six**) increased, liquid (**five**) decreased, and breakbulk (**zero**) decreased vessels:

*Figure 10 – Durban vessel view (per vessel group)*


*Source: Marine Traffic. Updated 13/09/2026 at 14:00.*

### iii. Eastern Cape

Ngqura Container Terminal recorded a minor decline in waterside volumes, remaining well above target at 151%. Vessels spent an average of 35 hours at anchorage and time at berth increased to 98 hours from 87 hours the previous week, with an average of two vessels waiting at anchorage. The terminal operated with an average of seven out of eight cranes and 24 of 30 RTGs throughout the week. High tides caused operational delays on Thursday.

Port Elizabeth Container Terminal recorded a larger decline of 31%, still moving 158% of target volumes, though down from last week's extraordinary 228%. Vessels spent an average of 20 hours waiting at anchorage and 35 hours at berth. The terminal operated with an average of two out of three cranes and 13 out of the 11 required straddle carriers.

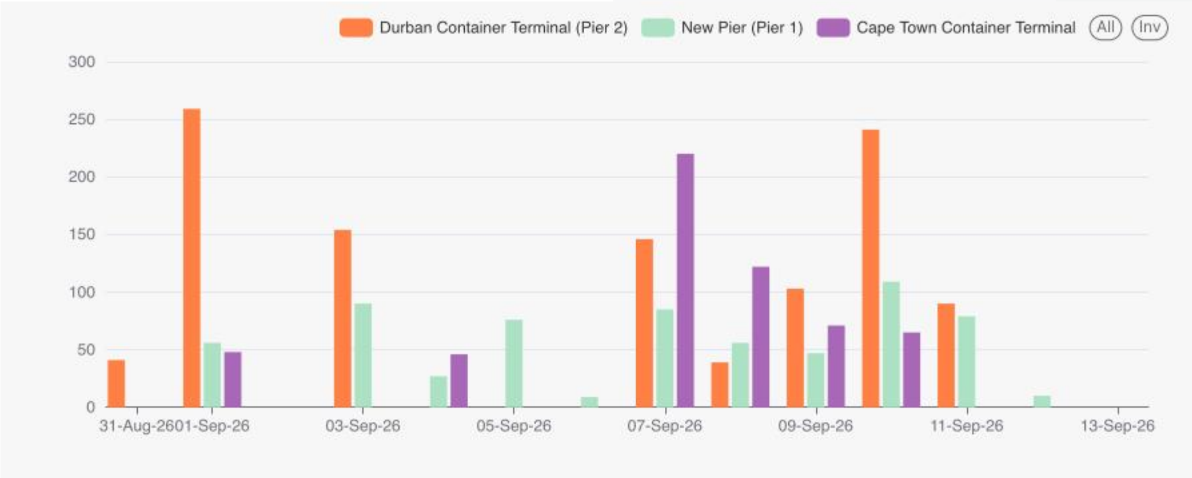
### iv. Richards Bay

At RBCT, the daily average coal throughput for the week **increased and** averaged close to **180,000 tons** (**↑21%**, w/w) per day. With an average of **27 trains per day** being serviced, above the target of 22.

### v. Transnet Freight Rail (TFR)

In the last week (*7 to 13 September*), rail cargo on the ConCor line out of Durban was reported at **1,080** containers, up by **↑1%** from the previous week's **1,064** containers.

*Figure 11 – TFR: Rail handled (Pier 1, Pier 2, and CTCT)*




*Source: Calculated using data from Transnet, 2025. Updated 13/09/2026.*

## 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 (*7 to 13 September*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *September 2025* was **~979,249 kg**.

*Table 7 – International inbound and outbound cargo from OR Tambo*

| **Flows** | **Daily Ave.** | **Weekly Vol.** | **Change** (w/w) |
|---|---|---|---|
| **Volume inbound** | **514,112** | **3,598,782** | **↓5%** |
| **Volume outbound** | **408,659** | **2,860,611** | **↑0.5%** |
| **Total** | **922,770** | **6,459,393** | **↓3%** |

*Courtesy of ACOC. Updated: 13/09/2026.*

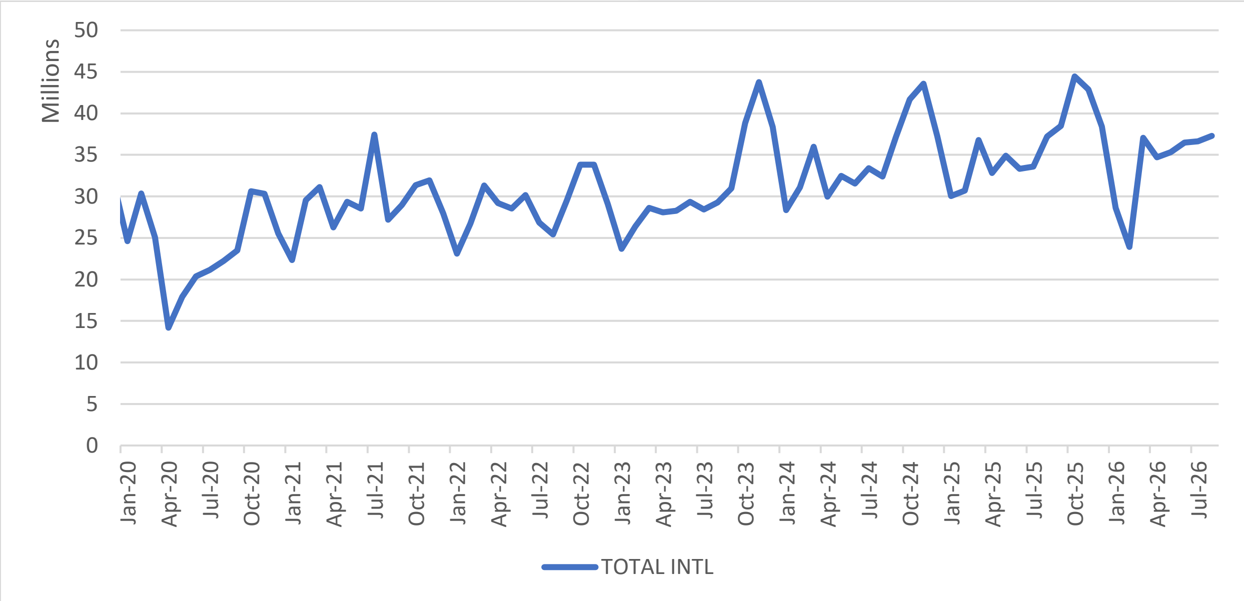
The reconciled figures for last week's international inbound air cargo to ORTIA amounted to the following daily averages: inbound **~514,000 kg** (**↓5%**, w/w) and outbound **~409,000 kg** (**↑0.5%**). Latest figures were not yet available and will be communicated next week.

For the full month of August, a slight increase was again witnessed across the board – except for Cape Town:

- Johannesburg increased by ↑**4%** (m/m) versus July – and is up by the same level (↑**4%**, y/y) versus 2025.
- Cape Town decreased by ↓**8%** (m/m) and by ↓**14%** (y/y) versus 2025.
- Durban increased by ↑**4%** (m/m) and by ↑**14%** (y/y).
- Consequently, total international air cargo for July 2026 is up by ↑**2%** (m/m) – but only up by ↑**0.3%** versus 2025.

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

*Figure 12 – International cargo: All terminals (monthly, kg millions)*




*Calculated from ACOC. Updated: 13/09/2026.*

The latest reported fuel stock days (as of Thursday morning, 17 September) per airport indicate:

- ORTIA: **9.4 days** (target: 5 days)
- CTIA: **5.6 days** (target: 4 days)
- Durban: **10.7 days** (target: 5 days)

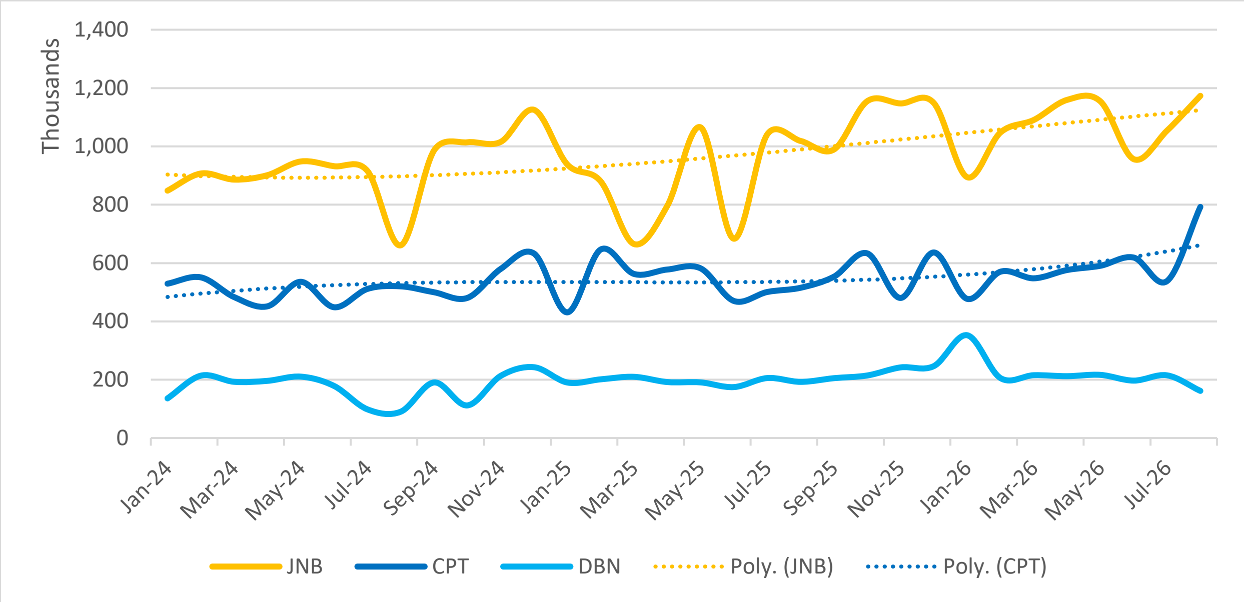
### b. Domestic air cargo

For August, domestic volumes handled at our three main terminals differed significantly, but were up across the board month-on-month – and remain up versus the same time last year:

- Johannesburg increased by ↑**11%** (m/m) versus July – and is up by ↑**15%** (y/y) versus 2025.
- Cape Town increased by a substantial ↑**47%** (m/m) but is up by ↑**54%** (y/y) versus 2025.
- Durban decreased by ↓**25%** (m/m) and is down by ↓**16%** (y/y) versus 2025.
- Consequently, total monthly domestic air cargo for August is up by ↑**18%** (m/m) and by ↑**23%** (y/y) versus 2025.

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

*Figure 13 – Domestic inbound and outbound cargo (thousands)*




*Courtesy of ACOC. Updated: 13/09/2026.*

## 3. Road and Regional Update

### a. Lebombo border post update

In the last week (*7 to 13 September)*, movements decreased for a second consecutive week – by around **124 trucks a day**, as trains from KM4 to Maputo were stable (at an average of **2.5 trains per day**).

- Truck volumes through the border post decreased to **1,245 HGVs per day** (**↓10%**, w/w).
- Overall, queue times **increased slightly** to an average of **~5.6 hours** (**↑19%**) at the border.
- The average processing times **also increased** – to an average of **~5.4 hours** (**↑23%**) per crossing.

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

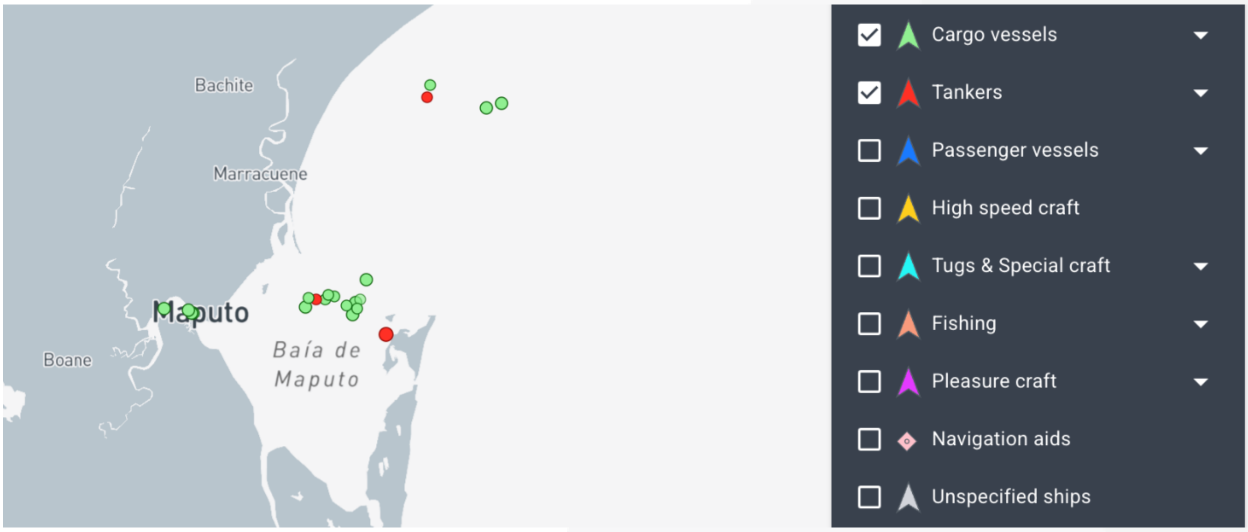
*Table 8* – Lebombo border post update

| | Trucks Entering KM4 | Trucks Exit KM4 | Mineral Trucks | General Cargo | Micro Importers | Export (full) | Fuel Tankers | Trucks staging in KM4 |
|---|---|---|---|---|---|---|---|---|
| Average | 1,245 | 1,226 | 916 | 169 | 34 | 59 | 47 | 287 |
| % (w/w) | **-10%** | **-7%** | **-10%** | **-22%** | **-16%** | **-22%** | **2%** | **-1%** |

*Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 13/09/2026.*

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

*Figure 14 – Maputo vessel view (per vessel group)*




*Source: Marine Traffic. Updated 13/09/2026 at 14:00.*

## b. SADC cross-border and road freight update

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

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

| Border Post | Northbound | (%, m/m) | Southbound | (%, m/m) | Total | (%, m/m) |
|---|---|---|---|---|---|---|
| Beitbridge | 17,350 | **4%** | 10,307 | **6%** | 27,657 | **4%** |
| Groblersbrug | 7,154 | **-1%** | 5,397 | **2%** | 12,551 | **0%** |
| Kopfontein | 6,548 | **7%** | 1,256 | **-25%** | 7,804 | **0%** |
| Lebombo | 45,095 | **-6%** | 44,014 | **-6%** | 89,109 | **-6%** |
| Ramatlabama | 5,380 | **-5%** | 3,219 | **7%** | 8,599 | **-1%** |
| Skilpadshek | 8,819 | **-1%** | 2,790 | **3%** | 11,609 | **0%** |

*Source: TransAfricaBorder, 14/09/2026.*

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts decreased by **↓2.9%** (m/m) during August. Northbound traffic (Eastbound for Lebombo) increased most notably at **Kopfontein** (**↑8%**), with considerably decreased volumes at **Lebombo** and **Ramatlabama** (**↓6%** and **↓5%**). Southbound traffic (Westbound for Lebombo) increased at **Ramatlabama** (**↑7%**) and Beitbridge (**↑6%**) – with the most notable Southbound movement to take note of being a **↓25%** reduction at Kopfontein.

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

- Overall, the average queue time **decreased considerably this week** – by around **three hours** from last week, as transit times **decreased 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) also decreased (by about **three-quarters of an hour**) – averaging **~6.3 hrs** (**↓10%**).

1. **DRC – pre-clearance documentation restrictions introduced:**
   a. DRC authorities have instructed border officials not to accept pre-clearance documentation for commercial vehicles, on the basis that registration of a customs

manifest is conditional upon the physical presence of the imported goods at customs facilities.
   b. Although the underlying memorandum dates from July 2025, the measure was implemented from 10 September 2026, potentially increasing border processing requirements and limiting the ability of transporters to complete customs formalities in advance.

2. **Chirundu – temporary northbound scanner disruption:**
   a. The northbound scanner on the Zambian side of Chirundu experienced technical difficulties on Sunday, resulting in two northbound truck queues extending for more than 6 km.
   b. The technical issue has subsequently been resolved, and traffic flow has returned to normal.
3. **Zimbabwe – temporary ZIMRA online portal disruption:**
   a. ZIMRA experienced problems with its online portal on Monday, with a number of transporters reporting that they were unable to log into the system.
   b. The disruption was resolved later the same day, limiting the duration of the operational impact.
4. **Regional customs digitalisation progressed:**
   a. **South Africa, Malawi, Mozambique, Zambia and Zimbabwe** adopted a roadmap to connect their customs systems and enable **pre-arrival cargo-data exchange** through a customs-to-customs (C2C) model.[11]
   b. The initiative is intended to allow customs information to move ahead of trucks, supporting earlier risk profiling and potentially reducing duplicate inspections and administrative delays at regional borders.

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

*Table 10 – Delays[12] summary – South African borders[13] (both directions)*

| Border Post | Direction | HGV[14] 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 | 600 | 13.5 | 3.6 | 13.3 | 18,000 | 4,200 |
| Beitbridge | Zimbabwe-SA | 525 | 4.8 | 1.3 | 4.5 | 15,750 | 3,675 |
| Groblersbrug | SA-Botswana | 253 | 12.8 | 1.4 | 12.5 | 7,590 | 1,771 |
| Martin's Drift | Botswana-SA | 168 | 1.8 | 0.3 | 1.5 | 5,040 | 1,176 |
| Kopfontein | SA-Botswana | 195 | 8.2 | 1.1 | 8.1 | 5,850 | 1,365 |
| Tlokweng | Botswana-SA | 40 | 0.6 | 0.2 | 0.4 | 1,200 | 280 |
| Vioolsdrift | SA-Namibia | 30 | 3.5 | 1.2 | 3.3 | 900 | 210 |
| Noordoewer | Namibia-SA | 20 | 1.4 | 0.3 | 1.3 | 600 | 140 |
| Nakop | SA-Namibia | 30 | 3.2 | 1.0 | 3.1 | 900 | 210 |
| Ariamsvlei | Namibia-SA | 20 | 1.2 | 0.4 | 1.2 | 600 | 140 |
| Skilpadshek | SA-Botswana | 273 | 10.3 | 2.2 | 10.2 | 8,190 | 1,911 |
| Pioneer Gate | Botswana-SA | 85 | 1.9 | 1.0 | 1.6 | 2,550 | 595 |
| Ramatlabama | SA-Botswana | 160 | 4.2 | 0.5 | 4.2 | 4,800 | 1,120 |

[11] Logistafrica. 01/09/2026. Southern Africa: Five Countries Move to Connect Customs Data to Improve Regional Logistics Corridors.
[12] 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.
[13] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[14] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

| Border Post | Direction | HGV[14] 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 | 117 | 0.5 | 0.1 | 0.3 | 3,510 | 819 |
| Lebombo | SA-Mozambique | 1,281 | 5.6 | 1.1 | 5.4 | 38,430 | 8,967 |
| Ressano Garcia | Mozambique-SA | 1,234 | 1.6 | 0.3 | 1.4 | 37,020 | 8,638 |
| **Sum/Average** | | **5,031** | **4.7** | **1.0** | **4.5** | **150,930** | **35,217** |

*Source: Calculated from TransAfricaBorder & Crickmay, week ending 06/09/2026.*

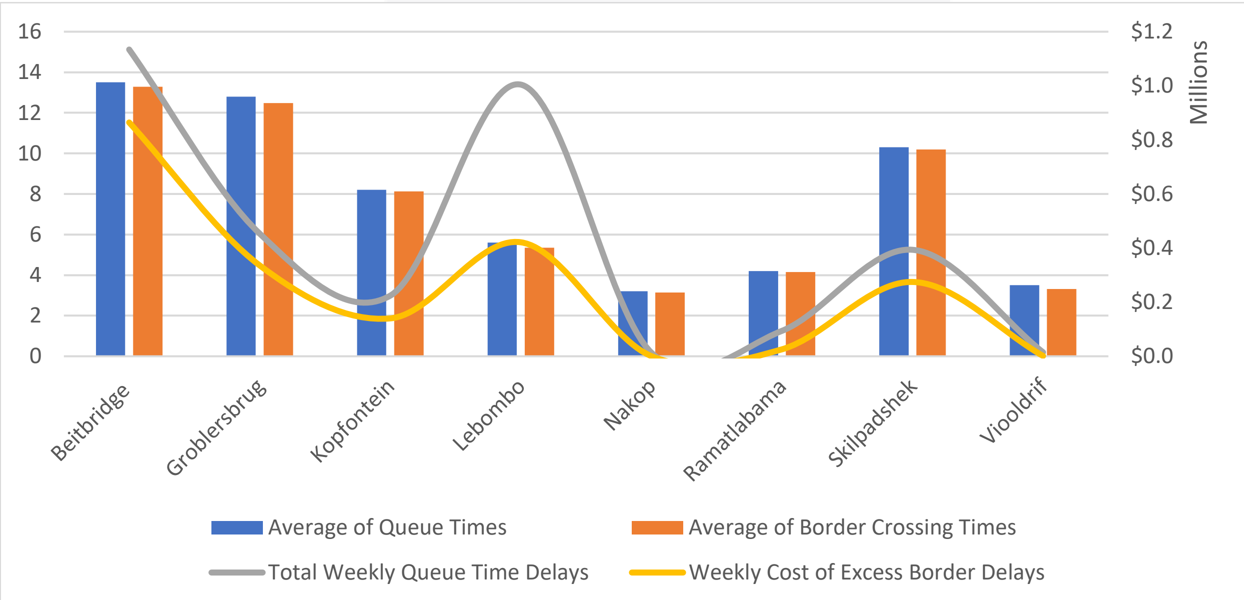
*Table 11 – Delays summary – Corridor perspective*

| Corridor | HGV Arrivals per day | Queue Time | Border Time – Best 5% | Border Time – Median | Est. HGV Tonnage per day | Weekly HGV Arrivals |
|---|---|---|---|---|---|---|
| **Beira Corridor** | 320 | 17.2 | 2.6 | 16.9 | 9,600 | 2,240 |
| **Central Corridor** | 798 | 0.0 | 0.0 | 0.0 | 23,940 | 5,586 |
| **Dar Es Salaam Corridor** | 1,819 | 23.6 | 7.2 | 23.6 | 54,570 | 12,733 |
| **Maputo Corridor** | 2,515 | 3.6 | 0.7 | 3.4 | 75,450 | 17,605 |
| **Nacala Corridor** | 127 | 0.0 | 0.0 | 0.0 | 3,810 | 889 |
| **North/South Corridor** | 3,671 | 14.7 | 3.4 | 13.3 | 110,130 | 25,697 |
| **Northern Corridor** | 2,817 | 1.4 | 0.1 | 1.4 | 92,520 | 21,588 |
| **WBNLD Corridor** | 900 | 3.8 | 0.7 | 3.6 | 27,000 | 6,300 |
| **Trans Cunene Corridor** | 100 | 2.3 | 0.7 | 2.2 | 3,000 | 700 |
| **Trans Kalahari Corridor** | 100 | 0.0 | 0.0 | 0.0 | 3,000 | 700 |
| **Trans Oranje Corridor** | 116 | 0.0 | 0.0 | 0.0 | 3,480 | 812 |
| **Sum/Average** | **13,283** | **6.8** | **1.6** | **6.5** | **406,500** | **94,850** |

*Source: Calculated from TransAfricaBorder & Crickmay, week ending 06/09/2026.*

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

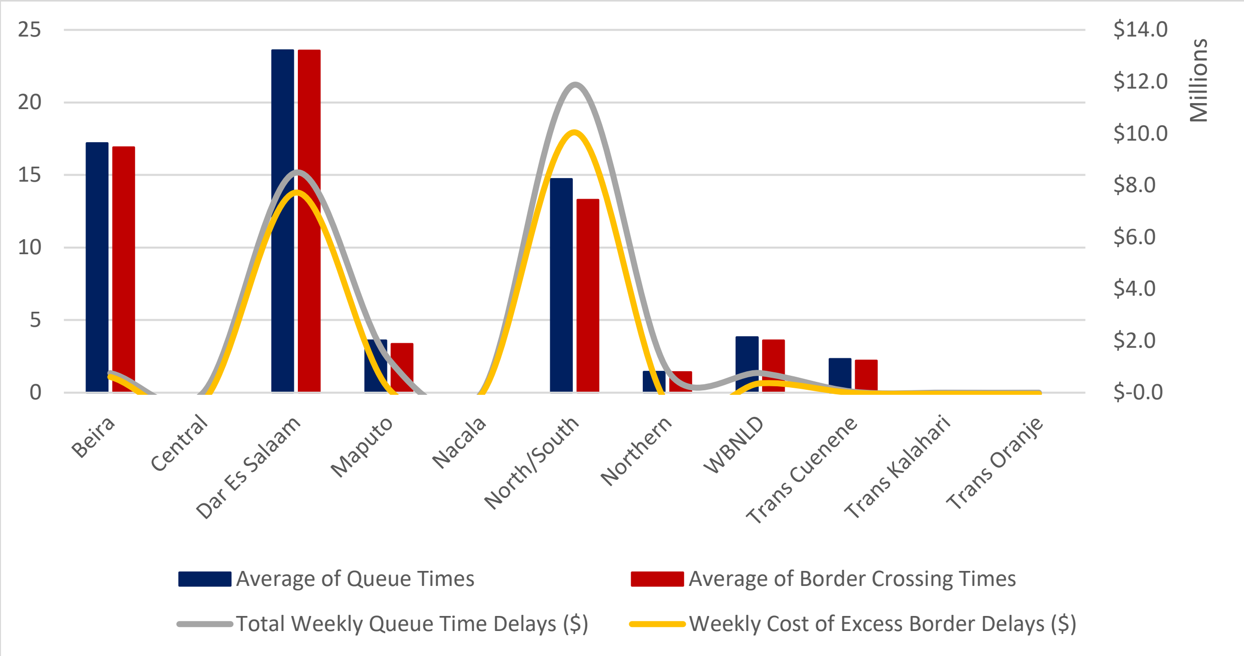
*Figure 15 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)*




*Source: Calculated from TransAfricaBorder & Crickmay week ending 06/09/2026.*

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

*Figure 16 – Weekly cross-border delays & estimated cost from a corridor perspective (hours & $ millions)*




*Source: Calculated from TransAfricaBorder & Crickmay, week ending 06/09/2026.*

In summary, cross-border queue time averaged **~6.8 hours** (down by **~3.1 hours** from the previous week's **~9.9 hours**), indirectly costing the transport industry an estimated **$24.1 million** (**R391 million**). Furthermore, the week's average cross-border transit times hovered around **~6.5 hours** (down by **~3.7 hours** from the previous week's **~10.1 hours**), at an indirect cost to the transport industry of **$17.9 million** (**R291 million**). The total indirect cost for the week amounts to an estimated **~$42 million** (**R682 million**, down by **↓20%** from the **~R854 million** in the previous report).

## 4. International Update

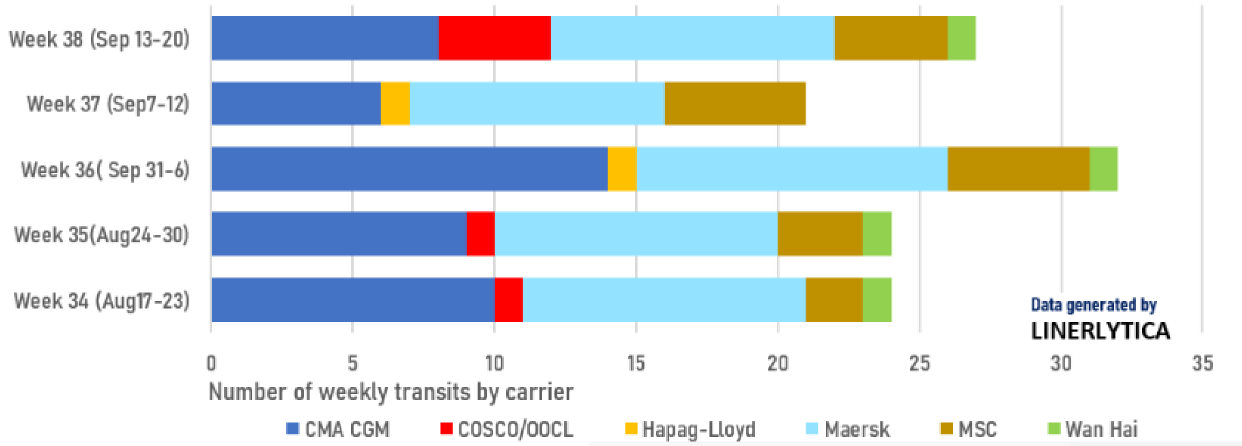
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

### a. Global shipping industry

#### i. Red Sea & global industry summary

Container shipping is showing a **measured but increasingly significant return to the Red Sea/Suez route**, despite continued security risks around Yemen and the Bab al-Mandeb. *Linerlytica* reports that COSCO and OOCL are joining CMA CGM in restoring Suez transits, while Maersk and Hapag-Lloyd are also expanding their use of the corridor:

*Figure 17 – Top 12 Carriers: Suez/Bab el Mandeb transits (Aug-Sept 2026)*




*Source: Linerlytica*

Consequently, the share of global container capacity still diverted around the Cape of Good Hope has fallen to a **two-year low of 4.6%**. *Sea-Intelligence* estimates that Red Sea routing is now approximately **27% normalised** for September, although the recovery remains uneven: Asia–Europe head-haul normalisation stands at only **13–25%**, compared with **25–47%** on Europe–Asia back-haul services.[15] Mediterranean–Asia services are returning fastest, with approximately **57%** of capacity routed via Suez, reflecting carriers' preference to reposition vessels back to Asia more rapidly. Overall, the trend points towards a **gradual rather than wholesale restoration** of Bab al-Mandeb/Suez transits.

Elsewhere, global port congestion remains a concern, as nearly **4 million TEU** (or **11.5% of global fleet capacity**) is currently stuck. The main areas remain around Southeast Asia, with Shanghai/Ningbo currently sitting with a **2.14** *queue-to-berth* ratio.

### b. Global air cargo industry

The latest weekly data from WorldACD show that global air cargo demand softened slightly in **week 36 (31 August–6 September)**, with chargeable weight declining by **↓1% week on week**, as renewed Middle East hostilities and Southeast Asian public holidays constrained traffic. Africa was the only origin region to record weekly growth (**↑1%**), while Central & South America (**↓4%**), North America (**↓3%**) and Asia Pacific (**↓1%**) contracted. Despite the weekly dip, global volumes remained **7% above 2025 levels**, with North America particularly strong (**↑18%**, y/y), albeit partly reflecting a Labour Day timing effect.

[15] Murphy, A. 16/09/2026. Read Sea Crisis is 27% normalized.

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

| Origin Regions last 2 to 5 weeks | Capacity¹ | | | Chargeable weight¹ | | | Rate¹ | | |
|---|---|---|---|---|---|---|---|---|---|
| | Last 5 wks | 2Wo2W | YoY | Last 5 wks | 2Wo2W | YoY | Last 5 wks | 2Wo2W | YoY |
| Africa | | -1% | +7% | | +6% | +7% | | -1% | +19% |
| Asia Pacific | | +1% | +2% | | +6% | +7% | | +0% | +20% |
| C. & S. America | | +0% | +4% | | +1% | +3% | | +1% | +10% |
| Europe | | +2% | +1% | | -2% | +4% | | +0% | +23% |
| M. East & S. Asia | | +1% | +3% | | -1% | +3% | | +3% | +51% |
| North America | | -1% | +3% | | +2% | +13% | | -1% | +21% |
| **Worldwide** | | **+1%** | **+2%** | | **+3%** | **+6%** | | **+1%** | **+23%** |

*Source: WorldACD*

Capacity declined by **↓1%** (w/w), continuing its broadly stable recent pattern, while average rates edged from **$2.99 to $3.00/kg**. Rising oil prices above **$100/barrel** point to increasing fuel-cost and surcharge pressure ahead.

**ENDS**[16]

[16] ***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.*