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Cargo Movement Update #300[1]

Date: 20 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)	34,047	38,790	**72,837**	42,851	48,819	**91,670**	↓21%
Air Cargo (tons)	4,414	3,198	**7,613**	4,544	3,299	**7,843**	↓3%

Monthly Snapshot

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

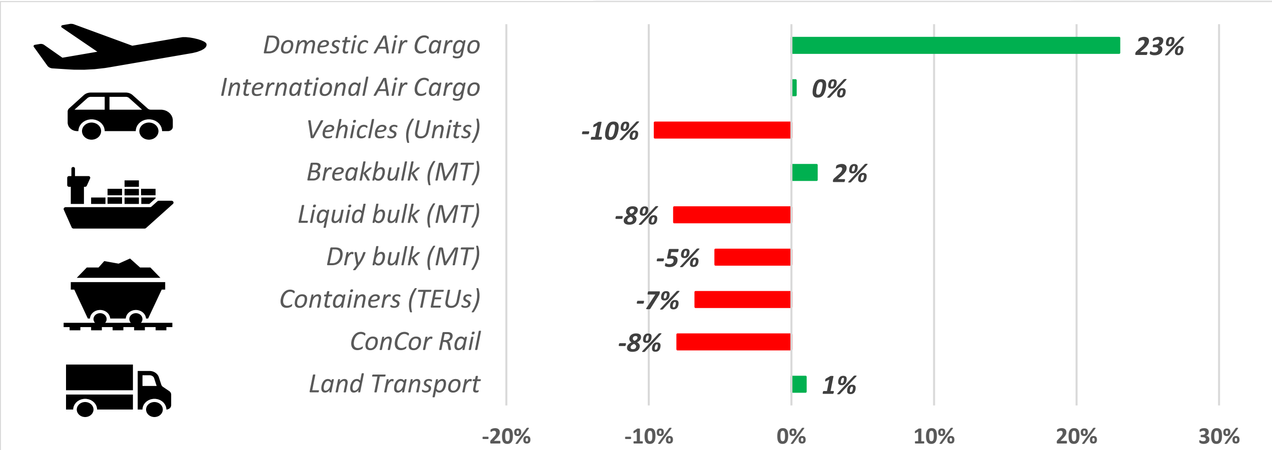
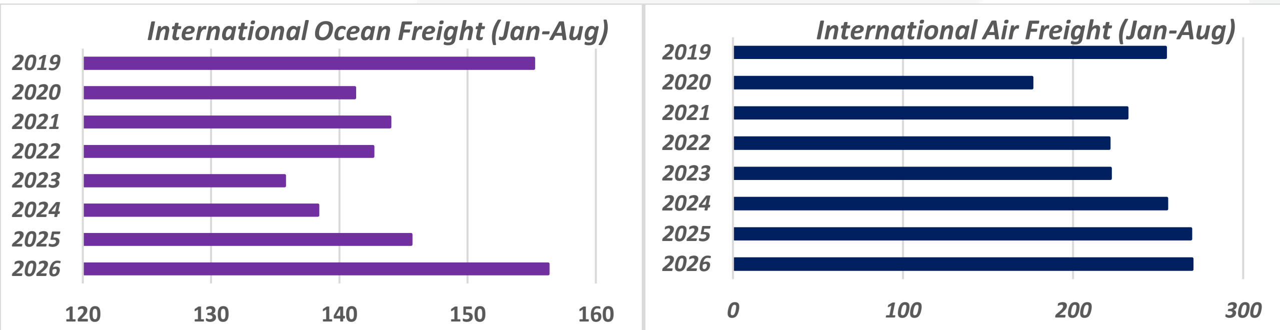


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **10,405 TEUs** was handled per day, with **11,939 TEUs** projected for next week.
- **DGT latest**: **~2,873 TEUs/day** (**↓39%**, w/w). 2 days of extreme weather contributed. Vessel queue @10.
- Rail cargo handled out of Durban was reported at **1,780** containers, up by **↑65%** versus last week.
- Cross-border queue: **↑1.2 hrs**; transit: **↑1.5 hrs**; SA borders: **~8.7 hrs** (**↑16%**); SADC: **~7.9 hrs** (**↑25%**).
- Global port congestion across Southeast Asia and India/Middle East remains close to record levels.
- Global air cargo stable: Rates (average & spot) up **~↑2%** & capacity up **↑2%** (y/y). Jet fuel still a concern.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *300th* 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 **10,405 TEUs** was handled daily, a decrease from **13,096 TEUs** the previous week.

DGT update: Waterside performance deteriorated again during the latest week, with throughput falling to **20,110 TEUs** (**↓39%**, w/w) after the previous week's rebound, as **two days of extreme weather and associated knock-on effects** disrupted operations. Vessel delays remain severe, with average anchorage time at approximately **214 hours** and **10 vessels at anchorage** in the latest daily position. Landside conditions remain materially improved from the late-August crisis, with stack occupancy at **54.5%** and road imports on hand at **1,960 containers**. However, gate and rail evacuation remain variable and below earlier operating levels.

Port operations for the week are starting to show the knock-on effects of the congestion in DGT, as Pier 1 and Durban MPT reported a slowdown in operations, along with some increased congestion. Equipment challenges and poor weather conditions have aggravated this. In the Eastern Cape, congestion is starting to build, particularly at NCT, as the terminal continues to outperform its target volumes; vessel turnaround times are starting to creep up, along with a building queue of vessels. PECT, on the other hand, continued to move more than double its target volumes, with no clear sign of congestion. The terminal could alleviate some of the congestion at NCT over the coming weeks. In the Western Cape, the terminals showed a recovery from a slower week in the previous report, as both terminals showed an increase in volumes, while outperforming their target volumes. The situation in the Cape is starting to show some signs of congestion, though there is still room to resolve the challenges, as the port system continues to support DGT in clearing the backlog.

Global container shipping remains quite constrained – characterised by **(1)** ongoing and persistent congestion, **(2)** tight vessel availability and **(3)** elevated rates, despite some easing in China. Port congestion is still absorbing **more than 11% of global containership capacity**, with Shanghai/Ningbo remaining key pressure points, although their *queue-to-berth* ratio eased to **1.79** this week. Simultaneously, the future capacity pipeline continues to expand rapidly, with the global containership orderbook now exceeding **45% of the existing fleet**, comprising **1,925 vessels and 15.6 million TEU**. The charter market consequently remains exceptionally firm amid scarce prompt tonnage.

Looking at the Red Sea and surrounds: Suez routings are gradually recovering, with Cape diversions falling to a **30-month low**, although renewed security concerns around Yemen and the Bab el-Mandeb continue to threaten that normalisation. Freight rates have stabilised at elevated levels, with Drewry's WCI at **$4,500/40ft**, while the HARPEX climbed to **2,450 points**.

The latest international air cargo to and from ORTIA shows a sustained elevated level of air cargo – despite a small reduction. For the week, the daily average inbound cargo amounted to **~630,500 kg** (**↓3%**, w/w) and outbound **~457,000 kg** (**↓3%**). Consequently, the current numbers are **↑11%** above the same levels last year this time.

Global air cargo markets remained broadly stable in Week 37, with worldwide tonnages and capacity largely unchanged, while average rates increased by **↑2%** (w/w) and spot rates by **↑3%**. Asia Pacific continued to provide the strongest momentum, with origin volumes rising **↑4%** (w/w) and spot rates strengthening for a third consecutive week. Transpacific demand remained particularly firm, with Asia Pacific–US volumes up strongly year-on-year, while Asia Pacific–Europe volumes remained below 2025 levels despite signs of gradual recovery. Gulf capacity also remained materially constrained relative to pre-conflict levels.

Other developments included **(1)** a further increase in the Baltic Air Freight Index, **(2)** a sharp weekly rise in global jet-fuel prices, and **(3)** the first trilateral customer shipment by IAG Cargo, MASkargo and Qatar Airways Cargo.

On the N4 corridor, movements increased – by around **132 trucks a day**, as trains from KM4 to Maputo decreased slightly (at an average of **2 trains per day**). Truck volumes through the border post increased to **1,377 HGVs per day** (**↑10%**, w/w). Overall, queue times **decreased slightly** to an average of **~4.6 hours** (**↓18%**) at the border. The average processing times **also decreased** – to an average of **~4.3 hours** (**↓20%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time **increased by around an hour and a quarter this week**, as transit times **increased by slightly more** (**1.5 hours**). The median border crossing times at South African borders increased by **a similar amount** (**1.2 hours**), averaging **~8.7 hrs** (**↑16%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) also increased (by about **an hour and a half**) – averaging **~7.9 hrs** (**↑25%**). This week, on average, **three** SADC border posts took a day or more to cross, namely Chirundu OSBP, Kasumbalesa (the worst affected, taking around **four days** to cross from the **Zambian side**), and Mutukula OSBP.

Cross-border developments this week include **(1)** resumed tolling at Zambia's Kazungula Weighbridge, **(2)** vehicle-documentation enforcement issues in Mozambique, **(3)** ongoing pre-clearance challenges at Chirundu and Nakonde, **(4)** secured funding for the Chirundu Border Post upgrade, and **(5)** further progress on the proposed Botswana–Zambia rail link.

As we celebrate the 300th version of this weekly report, it is worth reflecting that the report itself was built through collaboration and a recognition that logistics cannot be understood as a collection of standalone activities. The present DGT disruption reinforces that lesson precisely: when one strategically important node comes under sustained pressure, the consequences quickly propagate across ports, rail, road, shipping schedules, cargo owners and ultimately the economy. The experience should not be interpreted as a failure of the PSP model, but rather as an important stress test from which governance, transparency, coordination and accountability must improve. South Africa needs the **right operating model for the right asset and corridor**, supported by continuous system-wide monitoring and collaboration between public and private stakeholders. Logistics is ultimately **economic infrastructure**: its purpose is not simply to move cargo, but to enable trade, investment and competitiveness. The challenge is therefore to build a system that consistently allows those outcomes to flourish.

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 14 to 20 September (measured in TEUs)

7-day flow reported (14/09/2026 – 20/09/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Previously Pier 2)	2,873	20,110	↓39%
New Pier (Pier 1)	1,147	8,030	↓42%
Cape Town Container Terminal	2,171	15,194	↑4%
Ngqura Container Terminal	2,609	18,264	↓1%
Port Elizabeth Container Terminal	881	6,170	↑57%
Other	724	5,069	↓34%
Total	**10,405**	**72,837**	↓21%

Source: Calculated from TPT, 2026. Updated 20/09/2026.

An average of **~10,405 TEUs** (↓21%) was handled per day for the last week (*14 to 20 September, Table 2*). Consequently, throughput was below the projected average of **~12,513 TEUs** (↓17% actual versus projected). For the coming week, an increased average of **~11,939 TEUs** (↑15%) is predicted to be handled (*14 to 20 September*, *Table 3*).

Table 3 – Container Ports – Weekly flow projected for 21 to 27 September (measured in TEUs)

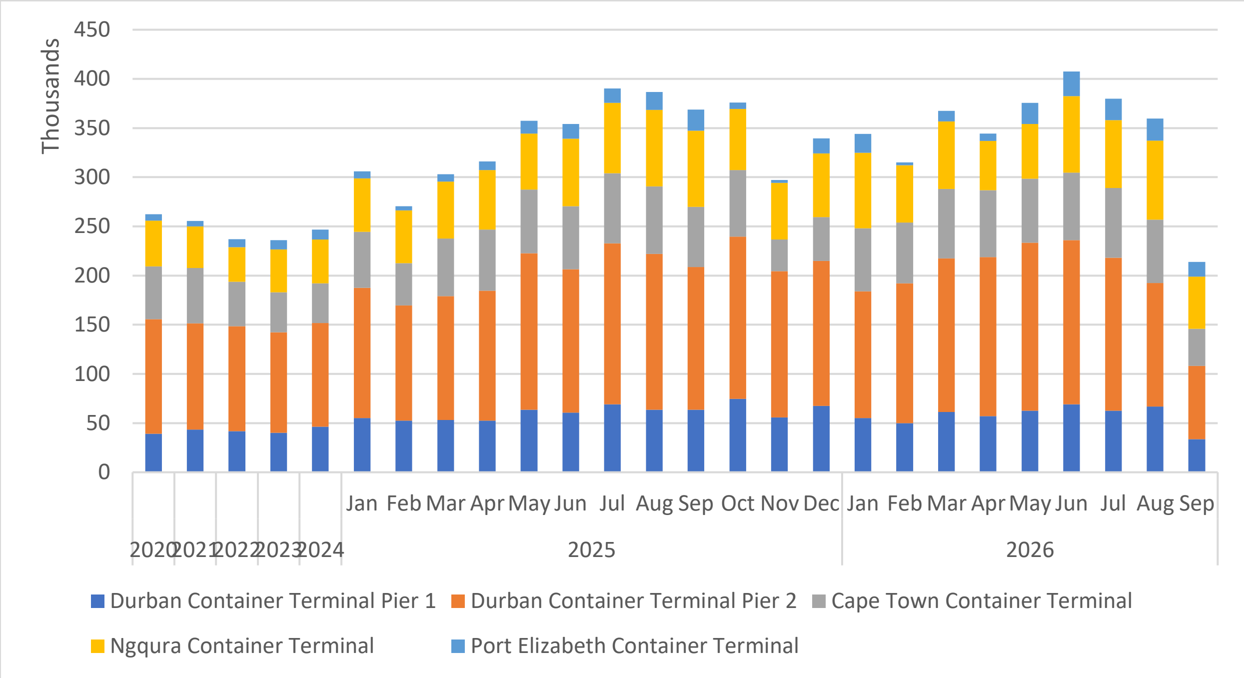
7-day flow projected (21/09/2026 – 27/09/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Previously Pier 2)[6]	4,998	34,985	↑74%
New Pier (Pier 1)	1,973	13,808	↑72%
Cape Town Container Terminal	2,052	14,366	↓5%
Ngqura Container Terminal	1,741	12,186	↓33%
Port Elizabeth Container Terminal	355	2,485	↓60%
Other	821	5,744	↑13%
Total	**11,939**	**83,574**	↑15%

Source: Calculated from TPT, 2026. Updated 20/09/2026.

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.

[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 20/09/2026.

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[7]	2.7[8]
Cape Town	MPT	0.0	1.3
Durban	DGT	5.8	5.1
Durban	Pier 1	2.7	2.5
East London	MPT	03	1.9
Ngqura	NCT	0.9	2.0
Port Elizabeth	PECT	1.2	1.2

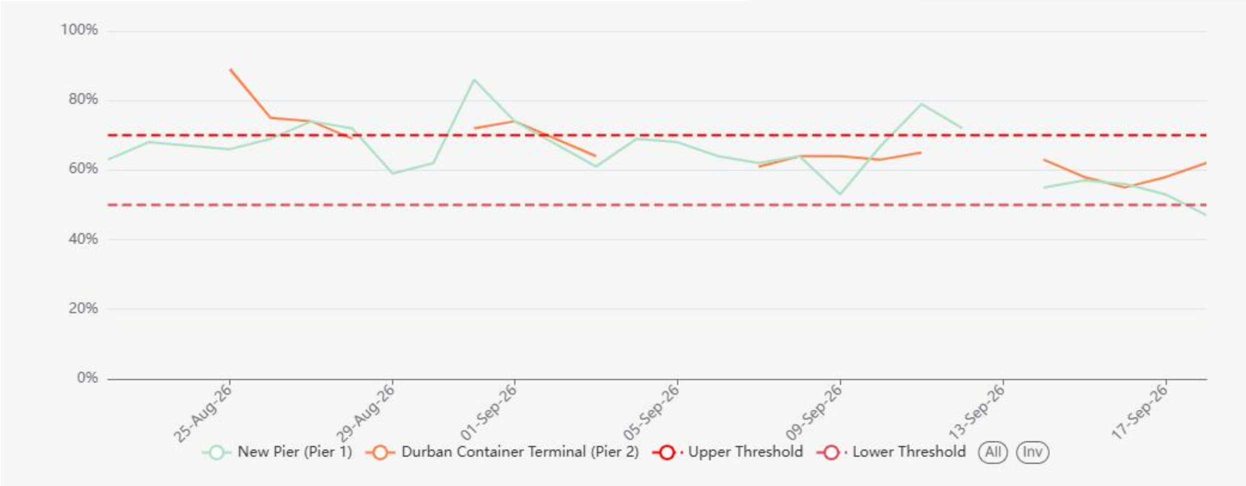
Source: Calculated from Marine Traffic AIS data, 2026. Updated 22/09/2026.

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

[7] According to data obtained in July.

[8] Ibid

Figure 4 – Stack occupancy in Durban, general-purpose containers (21 August to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 20/09/2026.

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 (21 August to present, day on day)

Source: Calculated using data from Transnet, 2026, and updated 20/09/2026.

b. Summary of port operations

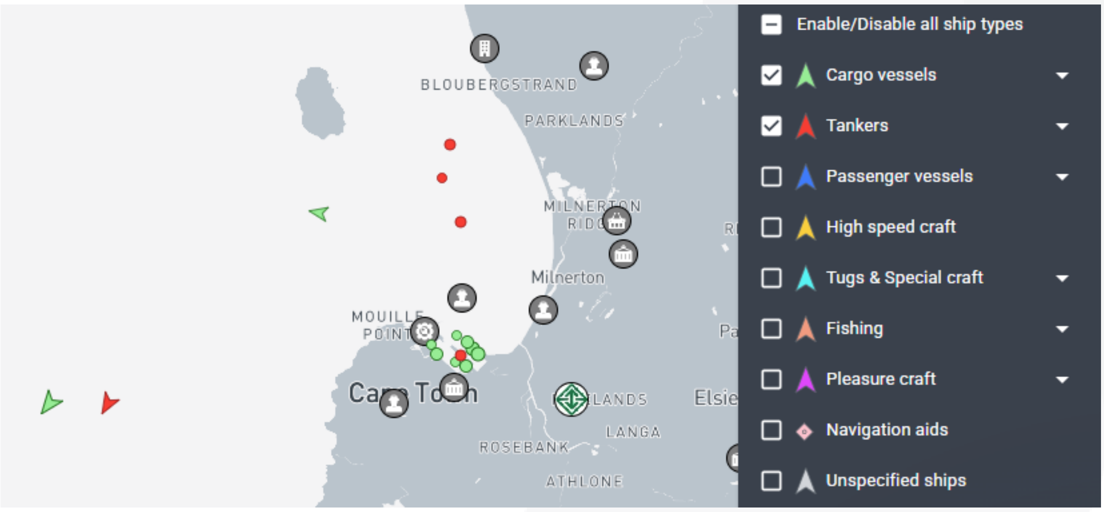
i. Cape Town

Cape Town Container Terminal reported a steady week, with a 4% increase in waterside volumes, moving 106% of their target volume for the period, supported by eight out of nine cranes and 29 out of 32 RTGs throughout the week. Vessel turnaround times remained strong with vessels spending an average of 5 hours waiting at anchorage, and 67 hours at berth.

Cape Town Multi-Purpose Terminal recorded a significant increase in waterside volumes, up by 121%, delivering 148% of the target for the period. Vessels spent an average of 55 hours waiting at anchorage and 28 hours at berth, for those that completed operations. The terminal operated with an average of two out of three cranes and two out of five straddle carriers throughout the week.

AGL Terminal handled 730 TEUs during the week, with an average of 45 hours spent waiting at anchorage and working just under 20 hours. Both cranes were operational, and no weather delays were recorded. No vessels were waiting at anchorage, with one vessel at berth at the close of the reporting period.

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



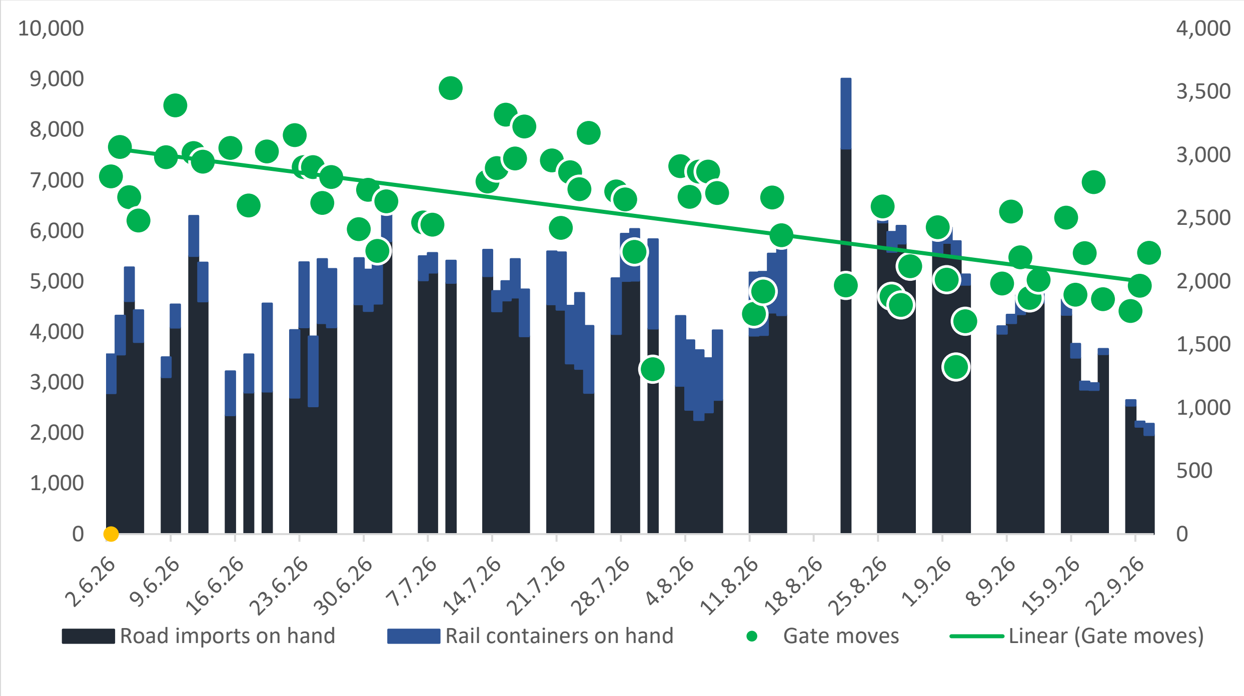
Source: Marine Traffic. Updated 20/09/2026 at 14:00.

ii. Durban

Pier 1 reported a sharp decline in waterside volumes, dropping by 42%, reaching only 58% of target volumes for the period. Average time spent at anchorage increased to 127 hours (up from 86 hours) and 89 hours at berth. Further to the decline in volumes, congestion is starting to build, with three vessels waiting at anchorage. The terminal reported an average of just three out of seven cranes available in contrast to a full complement of RTGs for the week. The **TTT** for the week averaged **~60 minutes** (**↑43%**, w/w), and the average **staging time** was **~29 minutes** (**↑26%**).

DGT waterside performance deteriorated again during the latest week, with actual throughput falling to **20,110 TEUs (↓39%, w/w)** after the previous week's rebound to **33,195 TEUs**. DGT advised that **two days of extreme weather and associated knock-on effects** materially affected operations. Vessel delays consequently remain severe, with average anchorage time at approximately **214 hours** and berth time around **123 hours**; the latest daily position showed **10 vessels at anchorage**. Landside conditions remain materially better than during the late-August crisis: general stack occupancy stood at **54.5%** and road imports on hand at **1,960 containers**. However, gate and rail evacuation remain variable, with **2,225 gate moves** and **287 rail moves** in the latest 24 hours. The accompanying graph illustrates the broader pattern: substantially reduced yard inventories, but landside throughput has not yet returned consistently to pre-crisis levels.

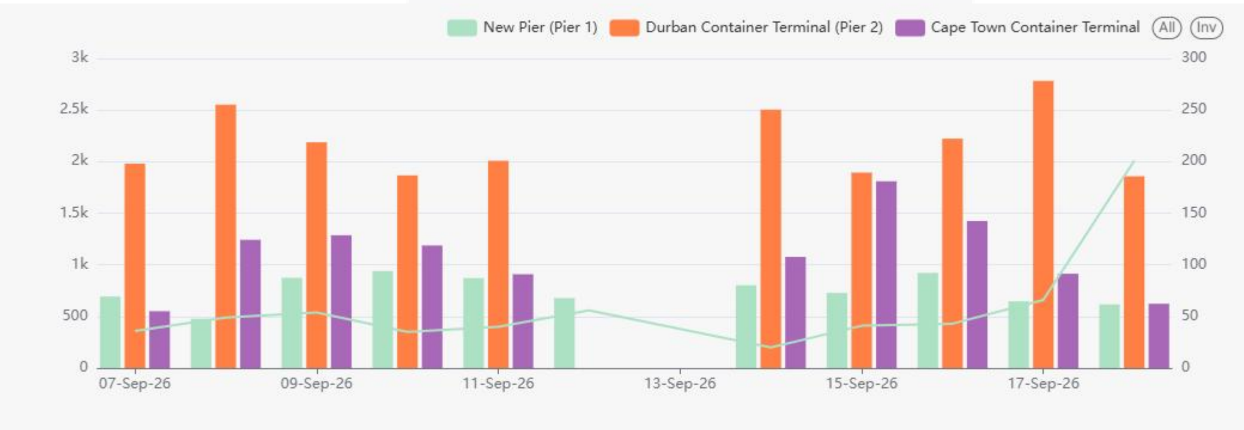
Figure 7 – DGT Yard: road imports, rail containers on hand, gate moves (as of 23 September)



Source: Calculated from DGT

Durban Multi-Purpose Terminal experienced a significant decline in waterside volumes, down by 53%, meeting only 76% of target volumes for the period. Some congestion can be anticipated, as vessel turnaround times increased significantly, alongside the decline in operations. Vessels spent an average of 160 hours waiting at anchorage (up from 57 hours), and 80 hours at berth.

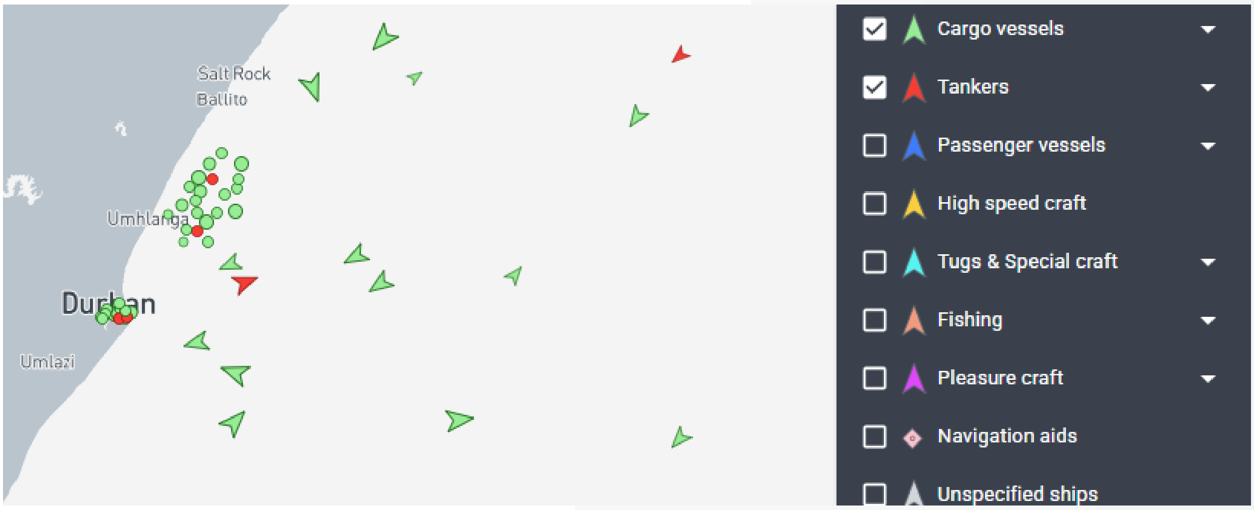
Figure 8 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 20/09/2026.

The queue of container vessels waiting outside Durban increased this week to **33 vessels, a considerable jump** from last week's **25**. On Wednesday morning (23 September), **19** (up from last week) container vessels were waiting outside at anchorage for Durban, **ten** for DGT, **two** for Point and **seven** for Pier 1. The queue of dry (**eight**) increased, liquid (**three**) decreased, and breakbulk (**two**) increased vessels:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 20/09/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal remained effectively flat, declining just 1%, remaining well above target at 150%. Time spent at anchorage more than doubled to 80 hours from 35 hours, and berth time was 76 hours. Furthermore, an average of three vessels were at anchorage, up from two the previous week, as the terminal is likely starting to feel the effects of the extended crisis. The terminal operated with an average of seven out of eight cranes and 22 of 30 RTGs throughout the week.

Port Elizabeth Container Terminal performance continued to surge, with volumes up 57%, reaching 248% of target — likely reflecting continued DGT diversions. Time at anchorage was around 17 hours and berth time 31 hours. The terminal operated with an average of two out of three cranes and a full complement of straddle carriers throughout the week. Strong winds are expected for the coming week, which could cause some delays.

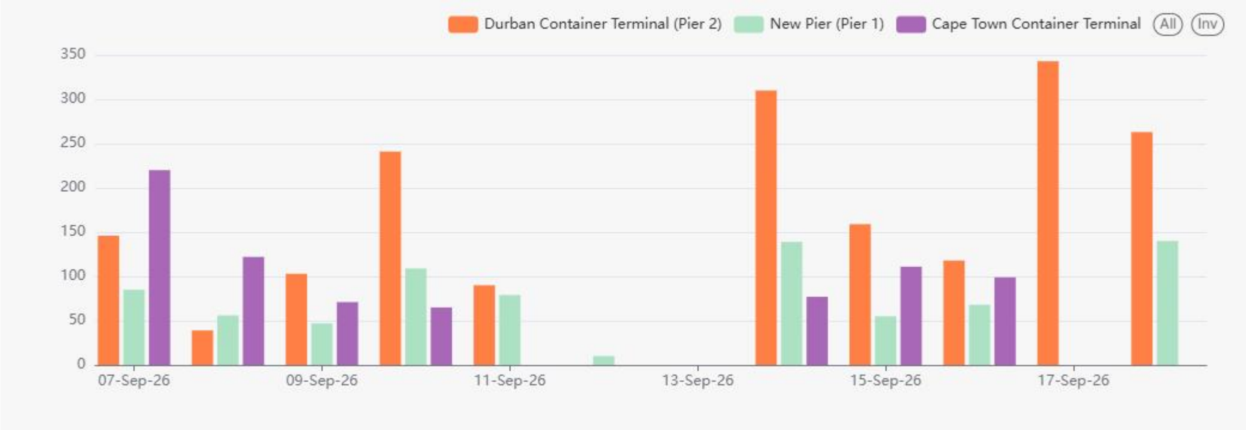
iv. Richards Bay

At RBCT, the daily average coal throughput for the week **decreased noticeably and** averaged close to **111,000 tons** (**↓38%**, 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 (*14 to 20 September*), rail cargo on the ConCor line out of Durban was reported at **1,780** containers, up by **↑65%** from the previous week's **1,080** containers.

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



Source: Calculated using data from Transnet, 2025. Updated 20/09/2026.

2. Air Cargo Update

a. International air cargo

As mentioned last week, the latest figures for the week ending *13 September* were not yet available at the time of publication last week. For the week, the daily average inbound cargo amounted to **~649,000 kg** (**↑26%**, w/w) and outbound **~471,000 kg** (**↓15%**) – marking a very good week for international air cargo handled at ORTIA.

The following table shows the inbound and outbound air cargo flows to and from ORTIA for last week (*14 to 20 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

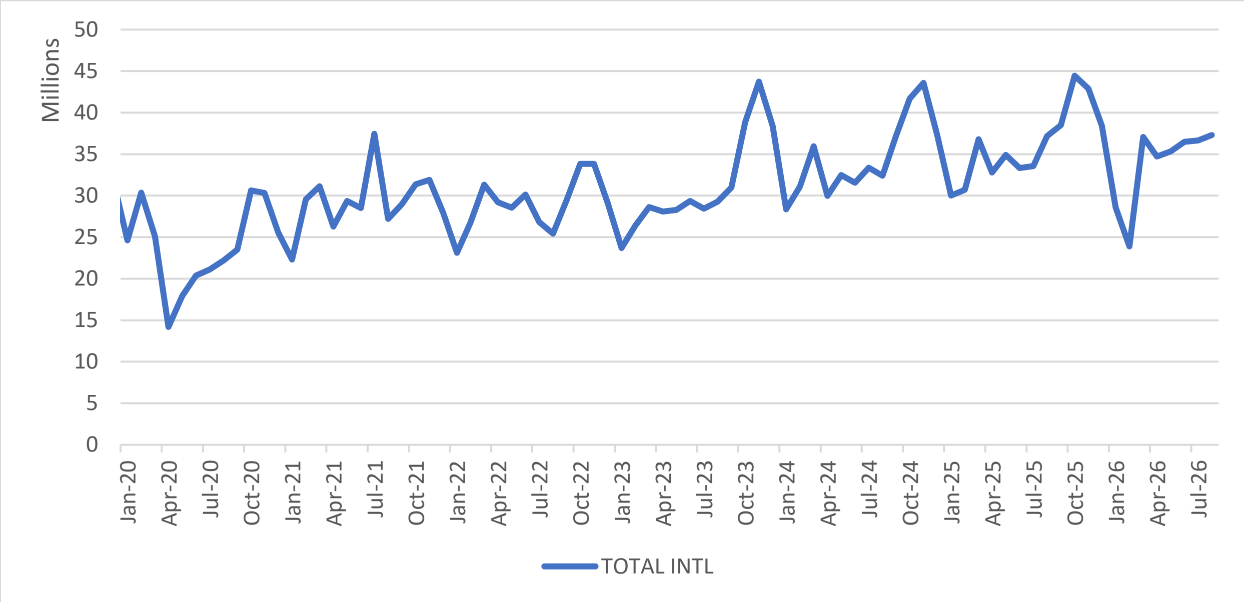
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	630,587	4,414,110	↓3%
Volume outbound	456,914	3,198,401	↓3%
Total	1,087,502	7,612,511	↓3%

Courtesy of ACOC. Updated: 20/09/2026.

The latest international air cargo to and from ORTIA shows a sustained elevated level of air cargo – despite a small reduction. For the week, the daily average inbound cargo amounted to **~630,500 kg** (**↓3%**, w/w) and outbound **~457,000 kg** (**↓3%**). Consequently, the current numbers are **↑11%** above the same levels last year this time.

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

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



Calculated from ACOC. Updated: 20/09/2026.

The latest reported fuel stock days (as of Wednesday morning, 23 September) per airport indicate:

- ORTIA: **6.9 days** (target: 5 days)
- CTIA: **5 days** (target: 4 days)
- Durban: **13.1 days** (target: 5 days)

3. Road and Regional Update

a. Lebombo border post update

In the last week (*14 to 20 September)*, movements increased – by around **132 trucks a day**, as trains from KM4 to Maputo decreased slightly (at an average of **2 trains per day**).

- Truck volumes through the border post increased to **1,377 HGVs per day** (**↑10%**, w/w).
- Overall, queue times **decreased slightly** to an average of **~4.6 hours** (**↓18%**) at the border.
- The average processing times **also decreased** – to an average of **~4.3 hours** (**↓20%**) per crossing.

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

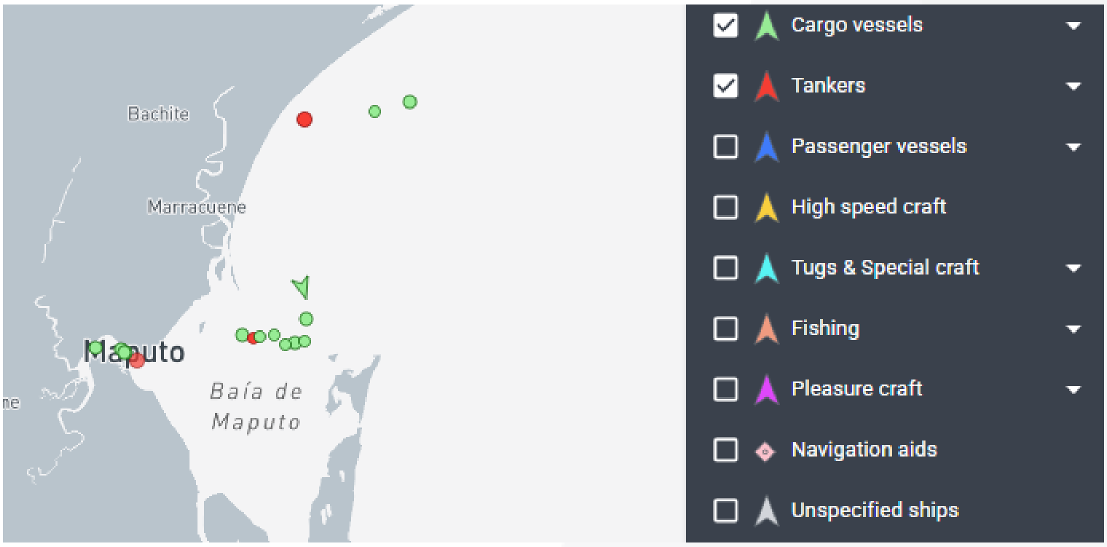
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,377	1,346	1,057	179	44	79	56	287
% (w/w)	**10%**	**9%**	**13%**	**6%**	**22%**	**26%**	**15%**	**0%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 20/09/2026.

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 20/09/2026 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 by around an hour and a quarter this week**, as transit times **increased by slightly more** (**1.5 hours**).
- The median border crossing times at South African borders increased by **a similar amount** (**1.2 hours**), averaging **~8.7 hrs** (**↑16%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) also increased (by about **an hour and a half**) – averaging **~7.9 hrs** (**↑25%**).

1. **Zambia – Kazungula:**
   a. Road tolling for medium and heavy vehicles **resumed at the Kazungula Weighbridge on 21 September**, following the completion of rehabilitation works that had suspended tolling since 2020.
   b. Zambia's National Road Fund Agency had announced the reopening earlier in September.[9]
2. **Mozambique – vehicle documentation:**
   a. Two separate incidents were reported in which police officers requested **original RC1 registration documents for truck horses and trailers**, threatening fines where drivers could not produce them.
   b. Originals are reportedly **not required**, and the matter has been escalated to the relevant authorities, with engagement with the Ministry expected to clarify enforcement requirements.

[9] NRFA. 16/09/2026. Road tolling resumes at Kazungula Weighbridge as NRFA collects K4 million in fines from motorists absconding from paying tolls.

3. **Zambia – Chirundu/Nakonde pre-clearance:**
   a. Concerns around **pre-clearance procedures continue to increase**. Clearing agents are reportedly reluctant to pre-clear cargo because Zambia's five-day transit period starts once clearance is completed.
   b. Where the transit period expires, the agent issuing the RIT may be suspended by ZRA, with reinstatement reportedly taking two to three days.
   c. Similar concerns have been raised at **Nakonde and other Zambian borders**, and ZRA has indicated that the matter will be discussed.
4. **Zimbabwe/Zambia – Chirundu upgrade:**
   a. A significant positive development came on **22 September**, when Zimbabwe announced that funding had been secured for the **modernisation of the Chirundu Border Post**.[10]
   b. The PPP project is intended to upgrade ageing infrastructure and processing systems at this critical North–South Corridor gateway.
   c. Previous government estimates put the project at approximately **$66.8 million**, with a 20-year concession envisaged.
   d. This is particularly relevant given the current operational and pre-clearance problems at Chirundu.
5. **Botswana/Zambia – regional rail connectivity:**
   a. Botswana and Zambia reported further progress on the proposed **430 km Mosetse–Kazungula–Livingstone railway** on 22 September, following joint technical and steering committee meetings in Kasane.[11]
   b. The project would create a new rail connection through the Kazungula corridor and is strategically important for reducing regional dependence on road freight. However, it remains a **longer-term infrastructure development rather than an immediate operational issue**.

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

Table 7 – 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	596	21.0	5.2	21.0	17,880	4,172
Beitbridge	Zimbabwe-SA	538	4.9	1.3	4.5	16,140	3,766
Groblersbrug	SA-Botswana	236	13.3	1.2	13.2	7,080	1,652
Martin's Drift	Botswana-SA	188	3.3	0.4	3.2	5,640	1,316
Kopfontein	SA-Botswana	226	7.0	1.0	7.1	6,780	1,582
Tlokweng	Botswana-SA	54	0.7	0.2	0.5	1,620	378
Vioolsdrift	SA-Namibia	30	4.8	2.0	4.5	900	210
Noordoewer	Namibia-SA	20	2.9	0.5	2.5	600	140
Nakop	SA-Namibia	30	3.2	0.4	3.1	900	210
Ariamsvlei	Namibia-SA	20	1.2	0.4	1.2	600	140
Skilpadshek	SA-Botswana	305	10.3	3.2	14.2	9,150	2,135

[10] Market Screener. 09/09/2026. Zimbabwe secures funds for key commodity gateway upgrade.
[11] Botswana Railways. 22/09/2026. BOTSWANA AND ZAMBIA ADVANCE MOSETSE–KAZUNGULA–LIVINGSTON.
[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
Pioneer Gate	Botswana-SA	97	2.2	1.1	2.1	2,910	679
Ramatlabama	SA-Botswana	164	2.5	0.3	2.3	4,920	1,148
Ramatlabama	Botswana-SA	103	0.6	0.1	0.4	3,090	721
Lebombo	SA-Mozambique	1,316	4.6	2.1	4.3	39,480	9,212
Ressano Garcia	Mozambique-SA	1,299	2.3	0.3	2.2	38,970	9,093
Sum/Average		**5,222**	**5.3**	**1.2**	**5.4**	**156,660**	**36,554**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 13/09/2026.

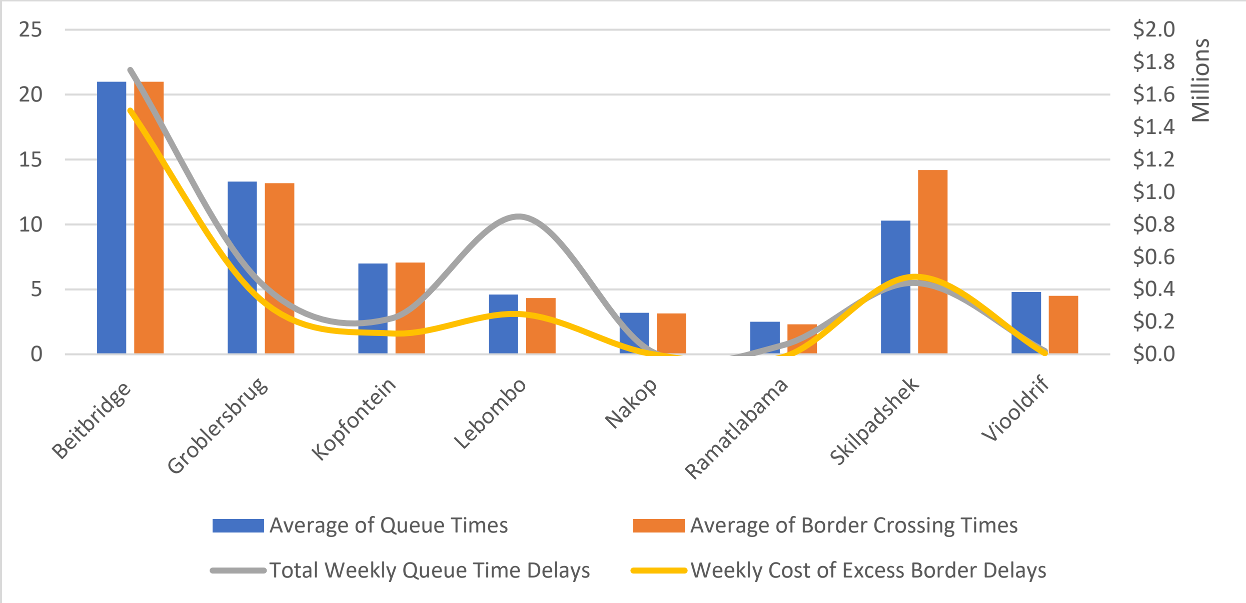
Table 8 – Delays summary – Corridor perspective

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	5.7	1.3	5.6	9,600	2,240
Central Corridor	798	7.5	0.8	7.3	23,940	5,586
Dar Es Salaam Corridor	1,819	20.1	3.9	20.2	54,570	12,733
Maputo Corridor	2,615	3.5	1.2	3.3	78,450	18,305
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,683	16.6	2.6	16.5	110,490	25,781
Northern Corridor	2,817	0.6	0.1	0.6	92,520	21,588
WBNLD Corridor	979	3.6	0.9	3.9	29,370	6,853
Trans Cunene Corridor	100	3.0	0.8	2.8	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	15.9	1.7	15.7	3,480	812
Sum/Average	**13,474**	**8.0**	**1.3**	**8.0**	**412,230**	**96,187**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 13/09/2026.

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

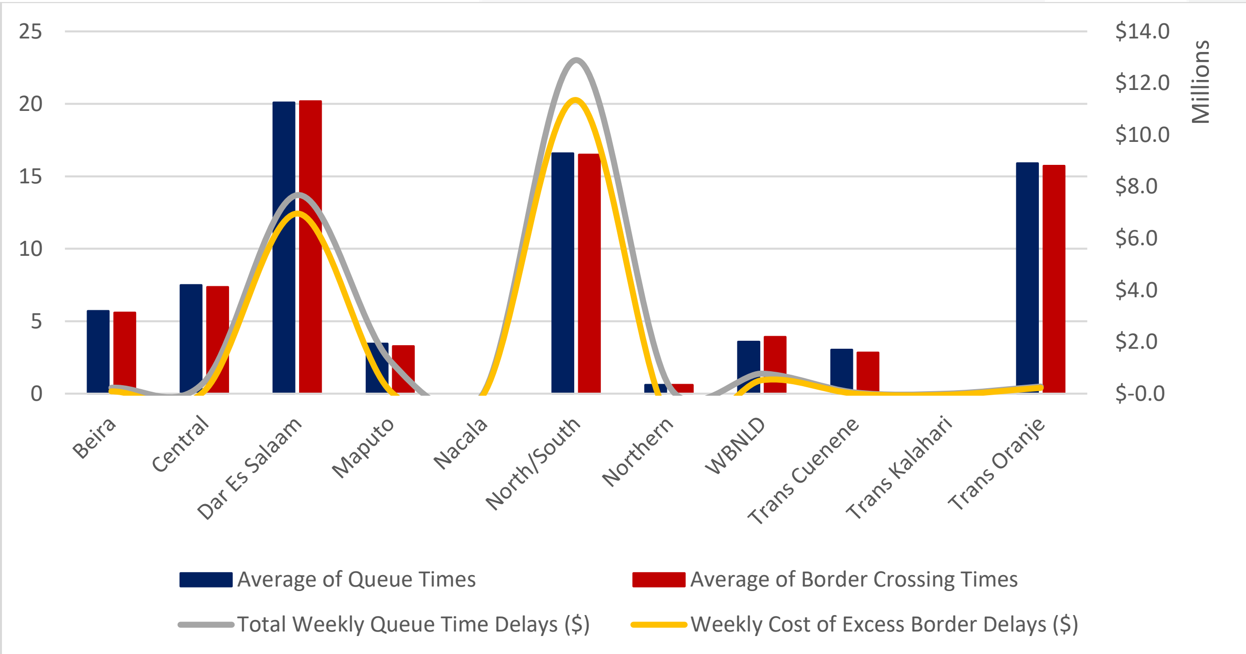
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 13/09/2026.

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 13/09/2026.

In summary, cross-border queue time averaged **~8 hours** (up by **~1.2 hours** from the previous week's **~6.8 hours**), indirectly costing the transport industry an estimated **$23.9 million** (**R387 million**). Furthermore, the week's average cross-border transit times also hovered around **~8 hours** (up by **~1.5 hours** from the previous week's **~6.5 hours**), at an indirect cost to the transport industry of **$18.2 million** (**R296 million**). The total indirect cost for the week amounts to an estimated **~$42.2 million** (**R683 million**, stable from the **~R682 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. Container port congestion

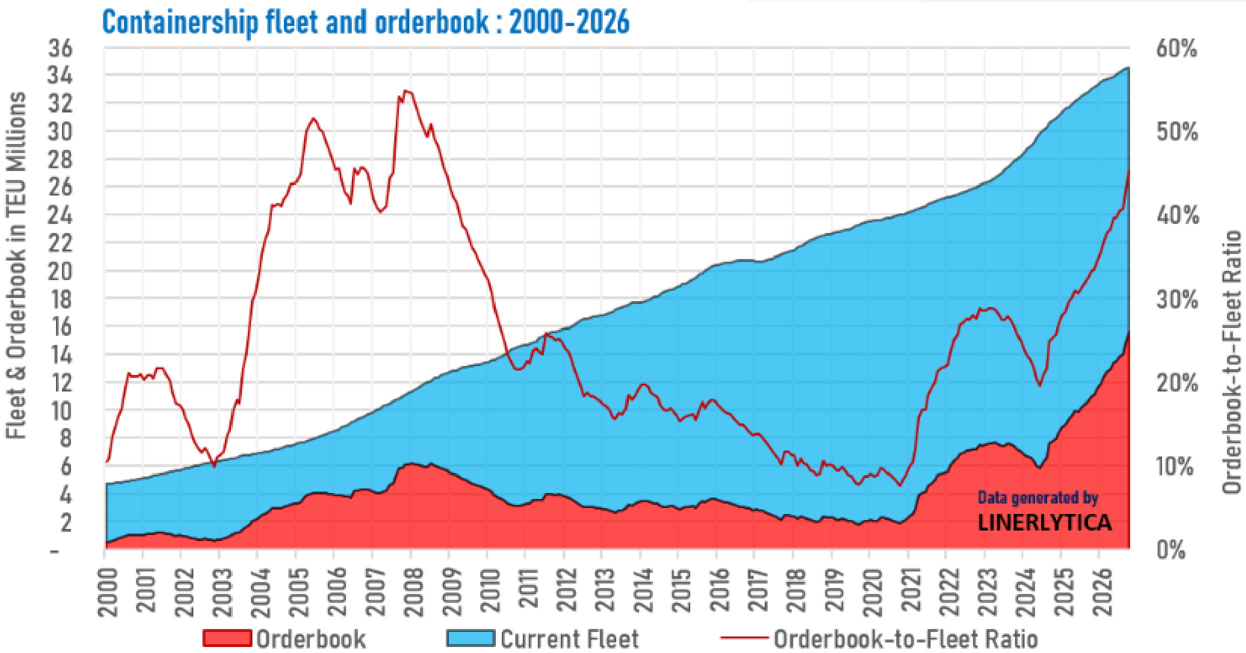
Global container shipping remains heavily constrained by **port congestion**, although conditions in China are beginning to ease from the extreme August/early-September peaks. *Linerlytica* estimates that congestion is still absorbing **more than 11% of global containership capacity**, with Shanghai/Ningbo remaining important pressure points following successive weather disruptions (although their *queue-to-berth* ratio has decreased this week to **1.79**).[15] Current operational data put average vessel waits at approximately **4.7 days in Shanghai and 2.5 days in Ningbo**, with individual Shanghai terminals still reporting **6–8-day delays**. Meanwhile, congestion across Southeast Asia and India/Middle East remains close to record levels, with pressure also emerging at selected US East Coast ports.

ii. Container capacity outlook

Against this tight near-term capacity backdrop, the industry is simultaneously building an enormous future supply pipeline. Linerlytica reports that the **containership orderbook has exceeded 45% of the existing fleet**, its highest ratio since 2009, comprising **1,925 ships and 15.6 million TEU**. The latest surge follows Maersk's confirmed order for 26 × 18,600-TEU ships and CMA CGM's reported 12 × 24,000-TEU vessels. Ironically, present vessel scarcity, elevated second-hand values and strong charter rates are making newbuild prices increasingly attractive, potentially reinforcing the capacity race.

[15] Linerlytica. 20/09/2026. Global Containership Port Congestion.

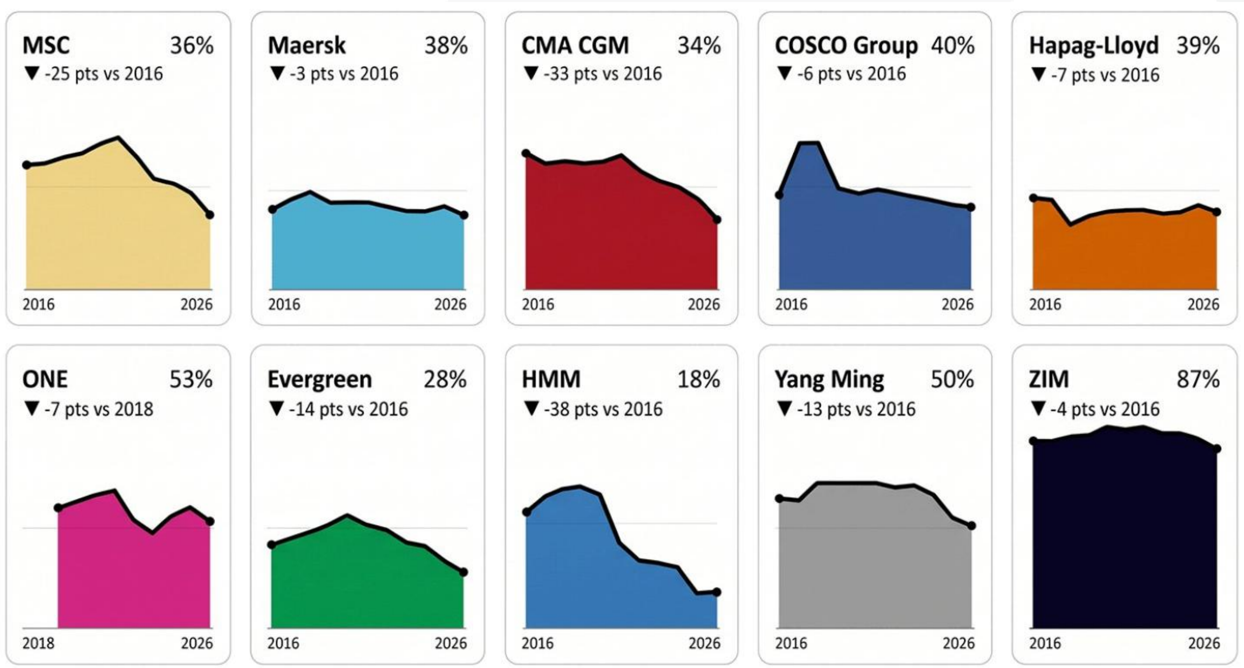
Figure 15 – Container fleet and orderbook (2000-2026)



Source: Linerlytica

The **charter market consequently remains exceptionally tight**, with scarce prompt tonnage, particularly in larger vessel classes, supporting firm rates and increasingly forward fixtures.

Figure 16 – Top 10 Carriers: percentage of fleet capacity chartered



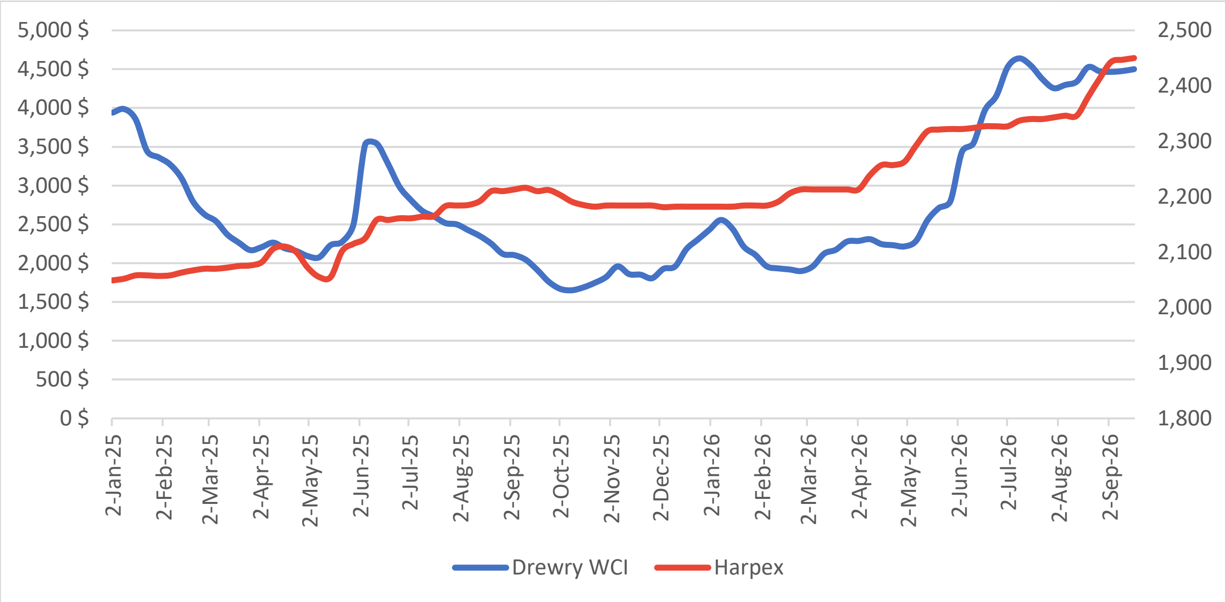
Source: Alphaliner

Meanwhile, carriers continue cautiously restoring Suez routings: Cape diversions have fallen to a **30-month low of around 250 ships/3.5 million TEU**, versus 380 ships/5.4 million TEU earlier this year. However, this commercial normalisation contrasts sharply with renewed security concerns around Yemen and the Bab el-Mandeb, meaning the Red Sea recovery remains vulnerable to reversal.

iii. Container freight and charter rates

Container freight rates have **stabilised at elevated levels**, with Drewry's "*World Container Index*" increasing marginally by **↑1%** (w/w) to **$4,500 per 40-ft container** on 17 September. However, underlying trades remain divergent: Transpacific rates strengthened while Asia–Europe rates declined. Meanwhile, the charter market remains exceptionally firm, with the **HARPEX rising to 2,450 points**, supported by continued scarcity of tonnage and high daily charter rates across vessel classes, including around **$72,000/day for 6,500-TEU ships and $79,000/day for 8,500-TEU ships**.

Figure 17 – Drewry World Container Index ($/40ft) & Harper-Petersen Charter Rates (index)



Source: Calculated from Drewry & Harpex

b. Global air cargo industry

The latest weekly data from WorldACD indicate that global air cargo markets remained relatively stable in Week 37, although pricing continued to strengthen. Worldwide tonnages and capacity were broadly unchanged week-on-week, while average rates increased by **↑2%** and spot rates by **↑3%**. Asia Pacific provided the main momentum, with origin tonnages rising **↑4%** and spot rates increasing for a third consecutive week, up **↑3%** to **$4.69/kg**. Global capacity remains around **↑2%** higher year-on-year, comprising **↑3%** freighter and just under **↑2%** belly capacity.

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

Origin Regions last 2 to 5 weeks	Capacity[1]			Chargeable weight[1]			Rate[1]		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		+0%	+7%		+5%	+8%		+0%	+19%
Asia Pacific		-0%	+2%		+2%	+9%		+2%	+21%
C. & S. America		-2%	+3%		-2%	+2%		+0%	+9%
Europe		+0%	+0%		+2%	+4%		+1%	+24%
M. East & S. Asia		+1%	+3%		+0%	+7%		+1%	+53%
North America		-3%	+3%		-6%	+7%		-2%	+20%
Worldwide		-1%	+2%		+1%	+7%		+2%	+24%

Source: WorldACD

Transpacific demand remained particularly strong, with Asia Pacific–US volumes up **↑17%** (y/y), including substantial gains from South Korea (**↑53%**), Hong Kong (**↑20%**) and China (**↑17%**). Conversely, Asia Pacific–Europe volumes remained **↓6%** (y/y), although China–Europe volumes returned marginally above 2025 levels. Gulf capacity also remained constrained, approximately **↓16%** below pre-conflict levels.

Other developments this week included **(1)** the global Baltic Air Freight Index increasing by **↑0.9%** (w/w) and **↑20.9%** (y/y), with elevated fuel costs placing further upward pressure on airfreight rates,[16] **(2)** IATA reporting that the global average jet-fuel price increased by **↑7.4%** (w/w) to **$194.90/barrel**,[17] and **(3)** IAG Cargo, MASkargo and Qatar Airways Cargo completing their **first trilateral customer shipment** ahead of the planned launch of their Global Cargo Joint Business, which will ultimately connect more than 400 destinations worldwide.[18]

ENDS[19]

[16] TIACA. 21/09/2026. TAC Index Measuring the State of the Air Cargo Market.
[17] IATA. 18/09/2026. Jet Fuel Monitor.
[18] IAG Cargo. 17/09/2026. IAG Cargo, MASkargo and Qatar Airways Cargo complete first customer shipment across Global Cargo Joint Business network.