LOGISTICS MARKET UPDATE

YOUR WEEKLY VIEW OF GLOBAL AND LOCAL LOGISTICS DEVELOPMENTS

FT360 | FNB | RMB

01 SEPTEMBER 2026

1 CLIENT BRIEFING

CHINA TO DURBAN: JOURNEY-WIDE RISK

Origin weather, Asian port congestion, transshipment uncertainty and an uneven Durban Gateway Terminal recovery are now overlapping.

- Typhoon Saudel disrupted Shanghai and Ningbo; reopened terminals still face accumulated backlogs.
- DGT yard density is easing, but vessel delays, reefer pressure, truck bookings and evacuation remain uneven.
- More than 4.3 million TEUs are caught in global port congestion, reducing effective capacity.
- For time-sensitive cargo, routing and connection reliability now matter as much as the freight rate.

MESSAGE THIS WEEK

A sailing date is not enough. Manage the full journey - origin, hub connection, onward vessel and destination.

2 KEY INDICATORS

DURBAN DELAY
6 DAYS
public median indicator

WORLD CONTAINER INDEX
US$4,473
per 40ft | down 1% w/w

GLOBAL CONGESTION
4.3m+ TEUs
capacity tied up

3 THIS WEEK'S HEADLINES

1. DGT recovery compact: SAFLA and RFA propose a measurable 30-day recovery programme.
2. Reefer risk: citrus trucks reportedly waited up to 30 hours to deliver into DGT.
3. Intra-Asia rates: Drewry index rose 10% to US$1,199 per 40ft - a three-year high.
4. Blank sailings: 45 cancellations expected in weeks 36-40 across major East-West trades.
5. Trade compliance: provisional anti-dumping payments apply to specified Chinese coated steel.

4 PORT OPERATIONS

PORT	DELAY	COMMENT
DURBAN	6 days	Main watch: DGT recovery uneven
CAPE TOWN	4 days	Weather and cut-off sensitivity
COEGA / NGQURA	1 day	Manageable; confirm vessel berth
PORT ELIZABETH	1 day	Stable; check carrier schedule

Public median congestion indicators; actual vessel and container performance can differ.

5 SYSTEM PERFORMANCE

CONTAINERS
84,435 TEUs
+1% w/w

RAIL
781
-64% w/w

AIR CARGO
6,839t
+2% w/w

SA BORDER
9.6 hrs
up w/w

LEBOMBO
1,260/day
-20% w/w

DELAY COST
R526m
-10% w/w

6 CHINA TO DURBAN MARKET RATES

ORIGIN	20GP (USD)	40HQ (USD)
NANSHA	2,775	3,400
NINGBO	2,600	3,100
SHANGHAI	2,600	3,100
SHEKOU	2,550	3,100
QINGDAO	2,900	3,300
TIANJIN	3,000	3,350

Indicative rates valid to 6 September 2026; subject to space, surcharges and booking acceptance.

7 BEFORE YOU BOOK

- Direct or transshipping?
- Which hub and onward vessel?
- Is the connection performing?
- Latest DGT and reefer position?
- Realistic delivery window?

KEY TAKEAWAY

The cheapest freight rate can quickly become expensive when cargo waits at origin, at a transshipment hub or at destination. Confirm the full routing before committing time-sensitive cargo.

Sources: Drewry, Freight News, SARS, GoComet and BUSA / SAAFF Cargo Movement Update #296. Operational indicators are not guarantees.