

Cargo Movement Update #303¹

Date: 11 October 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)	41,568	47,358	88,926	39,241	44,706	83,947	↑6%
Air Cargo (tons)	4,666	3,471	8,138	4,386	3,122	7,508	↑8%

Monthly Snapshot

Figure 1 – Cyclical⁴ monthly cargo volume, year on year (most metrics: Sep '25 vs Sep '26, % growth)

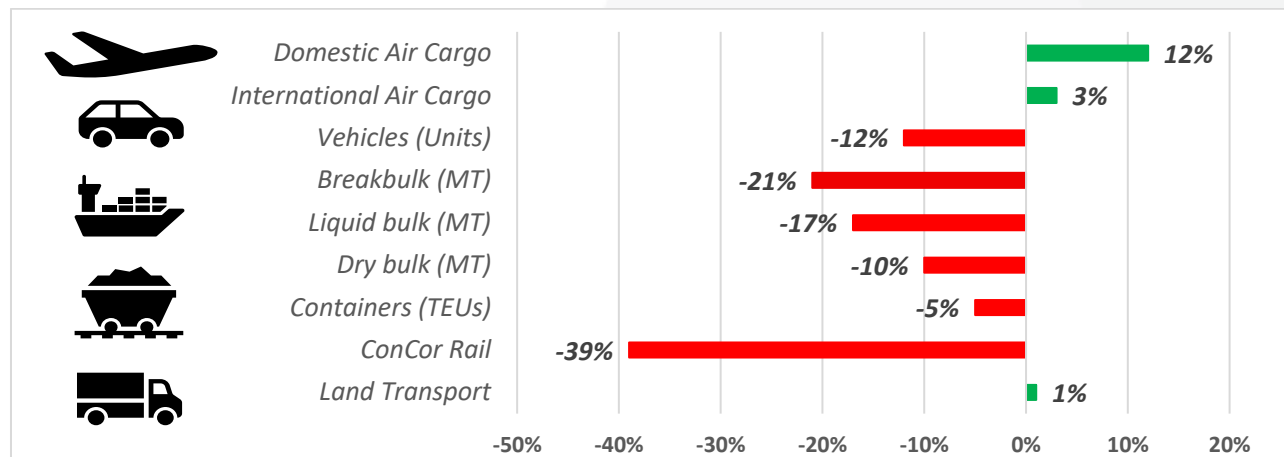
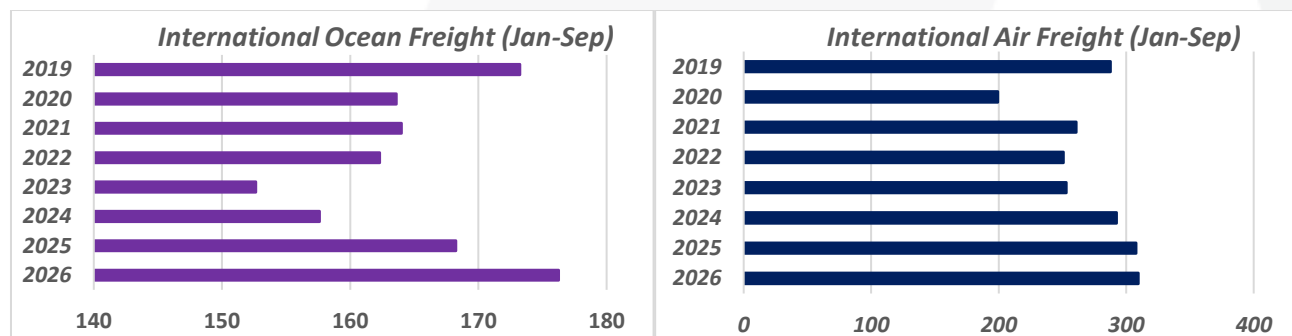


Figure 2 – Year-to-date flows 2019-2026⁵: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **12,704 TEUs** was handled per day, with **12,694 TEUs** projected for next week.
- DGT latest: ~4,734 TEUs/day** (↑6%, w/w). Operational metrics have improved, but vessel queues remain high.
- TNPA Sep: Containers: ↑20% (m/m); ↑3.5% (YTD). Bulk: ↑11% (m/m); ↑4.8% (YTD). Vehicles: ↑4% (m/m).**
- Rail cargo handled out of Durban was reported at **1,906 containers**, up by **↑24%** versus last week.
- Cross-border queue: **↓1.9 hrs**; transit: **↓0.1 hrs**; SA borders: **~8.7 hrs (↓13%)**; SADC: **~8.5 hrs (no change)**.
- 34 Blank sailings** expected post Golden Week; port congestion **↓**; freight rates remain stable (but **2.6x**, y/y).

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 303rd 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: September vs. September.

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 **12,704 TEUs** was handled daily, an increase from **11,992 TEUs** the previous week.

DGT update: DGT recorded a modest improvement in waterside throughput during the latest week, increasing by around **↑6%**, while DGT reported broader two-week gains of approximately **↑15%** in total container moves, **↑18%** in waterside moves and **↑14.5%** in landside moves. However, **stabilisation from a depressed base should not be confused with recovery: 11 vessels** remained at anchorage, with average delays of around **251 hours** at anchorage and **127 hours** at berth, while the latest daily report showed gate performance falling to **2,111 moves** and road imports on hand rising to **3,559 containers**. Around **10,000 containers** are also being redirected through Pier 1/Point to relieve pressure at DGT, but the persistent vessel queue shows that the accumulated backlog has not yet been cleared.

Elsewhere, port operations remain under significant pressure, as Pier 1 showed a significant increase in vessel delays, while Durban MPT showed some improvement. These delays continue to push into the supply chain as a drop in vessel visits likely leads to a decline in operations at PECT, while NCT showed a strong performance on the waterside. In the Western Cape, poor weather conditions plagued the terminal, leading to a decrease in operations, though there is not yet cause for concern, as vessel turnaround times remain low.

The global container shipping industry remains challenged and characterised by **(1)** accelerating Red Sea/Suez transits, **(2)** persistent regional congestion and **(3)** heightened geopolitical uncertainty. This week, *Linerlytica* reports almost 50 weekly Suez transits by larger containerships, with a broader return anticipated in early 2027. Shorter routings will release effective vessel capacity and exert downward pressure on freight rates, although war-risk insurance could offset operational savings. Although Cape of Good Hope transits remain significantly longer, *Drewry* estimates that a 24,000-TEU vessel saves only around **\$1 million per round trip** (\$43 per slot).

Meanwhile, renewed attacks on commercial vessels in the Strait of Hormuz, including the sinking of *GFS Pride*, underscore continuing maritime security risks. Global port congestion eased slightly during China's Golden Week, with Shanghai–Ningbo vessel capacity at anchor or in port declining by **↓33%**, although bottlenecks persist across South and Southeast Asia. *Drewry* anticipates **34 blank sailings** across major East–West trades, while its *World Container Index* declined by **↓1.9%** (w/w) to **\$4,351 per FEU**. Despite this marginal correction, freight rates remain approximately **2.6 times higher** than two months earlier, reflecting continued market volatility.

The latest international air cargo to and from ORTIA shows an increase in both inbound and outbound cargoes. For the week, the daily average inbound cargo amounted to **~666,500 kg (↑6%, w/w)** and outbound **~496,000 kg (↑11%)**. Consequently, current volumes are up by **↑13% (y/y)**.

For September, South Africa's international air cargo volumes increased by **↑6% (m/m)** and **↑3% (y/y)**, primarily driven by strong growth in Cape Town (**↑48%, m/m; ↑16%, y/y**). Conversely, Johannesburg recorded a marginal monthly decline (**↓2%**) and remained broadly stable year-on-year (**↓0.1%**), while Durban experienced a more pronounced contraction (**↓11%, m/m; ↓20%, y/y**). Overall, the national increase masks considerable regional disparities in air cargo performance.

South Africa's domestic air cargo volumes declined by **↓10% (m/m)** in September 2026 but remained **↑12% higher (y/y)** than in September 2025. The monthly contraction was driven by reduced volumes in

Johannesburg (↓7%, m/m; ↑10%, y/y) and Cape Town (↓25%, m/m; ↑7%, y/y), while Durban recorded substantial growth (↑42%, m/m; ↑12%, y/y). Overall, despite weaker month-on-month performance, all three major terminals maintained positive year-on-year growth, indicating continued resilience in the domestic air cargo market.

Global air cargo volumes increased by ↑9% (y/y) in September, supported by strong demand from Asia Pacific and North America. Average freight rates remained elevated (↑25%, y/y), reflecting persistent geopolitical disruptions and higher fuel costs. Global capacity increased by approximately ↑4%, although Middle Eastern capacity constraints continued to affect market conditions.

On the N4 corridor, movements increased slightly – by around **30 trucks a day**, as trains from KM4 to Maputo also decreased (at an average of **1.5 trains per day**). Truck volumes through the border post increased to **1,427 HGVs per day** (↑2%, w/w). Overall, queue times **increased slightly** to an average of **~5.5 hours** (↑22%) at the border. The average processing times **increased by the same magnitude** – to an average of **~5.3 hours** (↑23%) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time **decreased by nearly two hours this week**, as transit times **were mostly unchanged**. The median border crossing times at South African borders decreased by **an hour and a half**, averaging **~8.7 hrs** (↓13%) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) was mostly unchanged – averaging **~8.5 hrs (no change)**. 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**).

Other cross-border developments included **(1)** a temporary 50% reduction in mineral-truck parking capacity at Mozambique's KM4 terminal for four months, potentially exacerbating congestion along the N4 corridor; **(2)** continued inconsistent enforcement of Mozambique's three-spare-tyre requirement, particularly in Tete, despite proposed legislative amendments; **(3)** disputed scanning and parking charges of \$55 at Kanyaka in the DRC, alongside renewed congestion following the reinstatement of scanning operations; **(4)** scheduled maintenance of the DRC's SYDONIA customs system on 10–11 October, potentially disrupting cargo clearance; and **(5)** persistent regional border congestion, with delays of approximately five days at Kasumbalesa and crossing times exceeding 24 hours at Chirundu and Namanga.

In summary, the latest figures reinforce the importance of viewing logistics as an integrated system rather than a collection of individual assets. Despite significant operational constraints, South African container volumes remain **↑3.5% year-to-date**, while bulk cargoes are **↑4.8%**, demonstrating underlying trade demand and the resilience of the network. Yet persistent congestion at Durban, rail and border constraints, and continued global disruption across the Red Sea, Suez and major shipping corridors show how quickly weaknesses in one node can propagate across the system. The outlook therefore depends not simply on higher throughput, but on ensuring that **ports, terminals, rail, road and borders operate in balance**, with the right capacity and interventions applied where constraints emerge.

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1. Ports Update

This section provides an overview of the flow of containerised cargo through our commercial ports.

a. Container flow overview

The following tables indicate the container flows reported for the last seven days. The reporting period runs from Monday to Sunday:

Table 2 – Container Ports – Weekly flow reported for 5 to 11 October (measured in TEUs)

7-day flow reported (05/10/2026 – 11/10/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Gateway Terminal (Previously Pier 2)	4,734	33,139	↑6%
New Pier (Pier 1)	2,167	15,170	↑1%
Cape Town Container Terminal	1,623	11,360	↓34%
Ngqura Container Terminal	3,031	21,216	↑46%
Port Elizabeth Container Terminal	201	1,407	↓41%
Other	948	6,634	↑98%
Total	12,704	88,926	↑6%

Source: Calculated from TPT, 2026. Updated 11/10/2026.

An average of ~**12,704 TEUs** (↓%↑6%) was handled per day for the last week (5 to 11 October, Table 2). Consequently, throughput was slightly above the projected average of ~**12,694 TEUs** (↑2% actual versus projected). For the coming week, an increased average of ~**12,694 TEUs** (↓0.1%) is predicted to be handled (12 to 18 October, Table 3).

Table 3 – Container Ports – Weekly flow projected for 12 to 18 October (measured in TEUs)

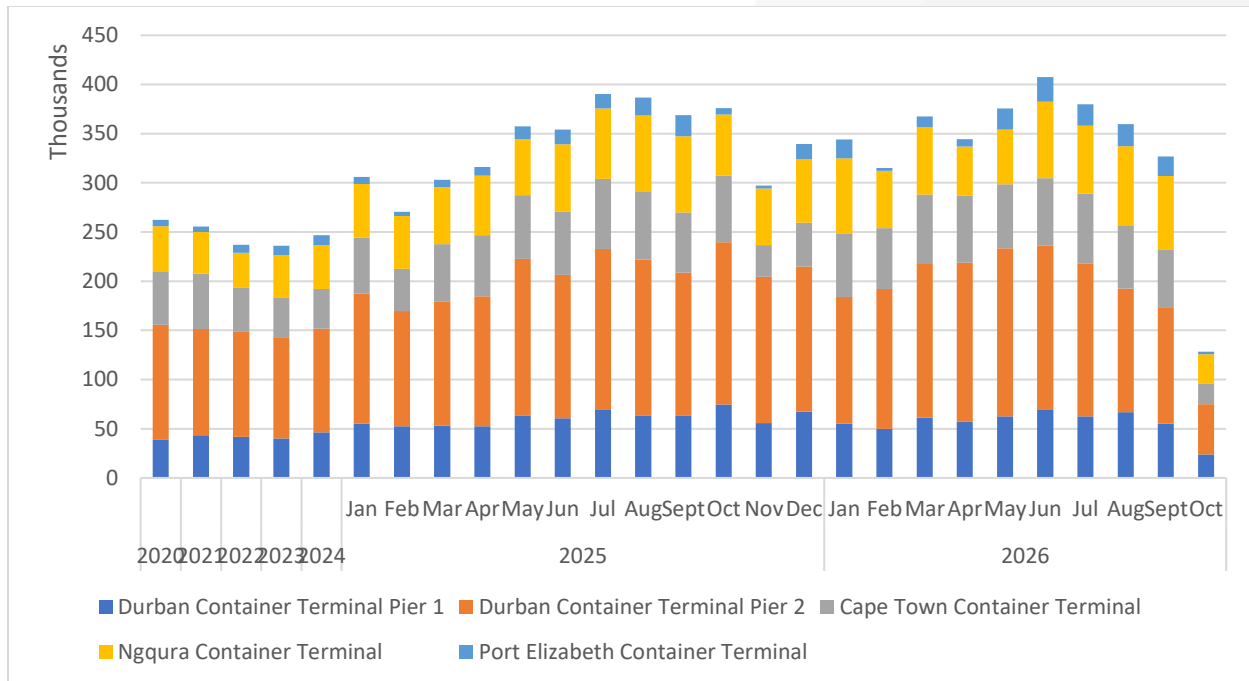
7-day flow projected (12/10/2026 – 18/10/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Gateway Terminal (Previously Pier 2) ⁶	5,174	36,217	↑9%
New Pier (Pier 1)	2,092	14,646	↓3%
Cape Town Container Terminal	1,773	12,409	↑9%
Ngqura Container Terminal	2,404	16,827	↓21%
Port Elizabeth Container Terminal	414	2,899	↑106%
Other	837	5,859	↓12%
Total	12,694	88,857	↓0.1%

Source: Calculated from TPT, 2026. Updated 11/10/2026.

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 11/10/2026.

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 morning:

Table 4 – Vessel Dwell Time

Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.7	3.2
Cape Town	FPT	2.0	1.3
Cape Town	MPT	0.0 ⁷	1.3
Durban	DGT	7.1	3.6
Durban	Pier 1	4.3	3.5
East London	MPT	0.3 ⁸	1.9
Ngqura	NCT	2.6	3.3
Port Elizabeth	PECT	1.4	1.4

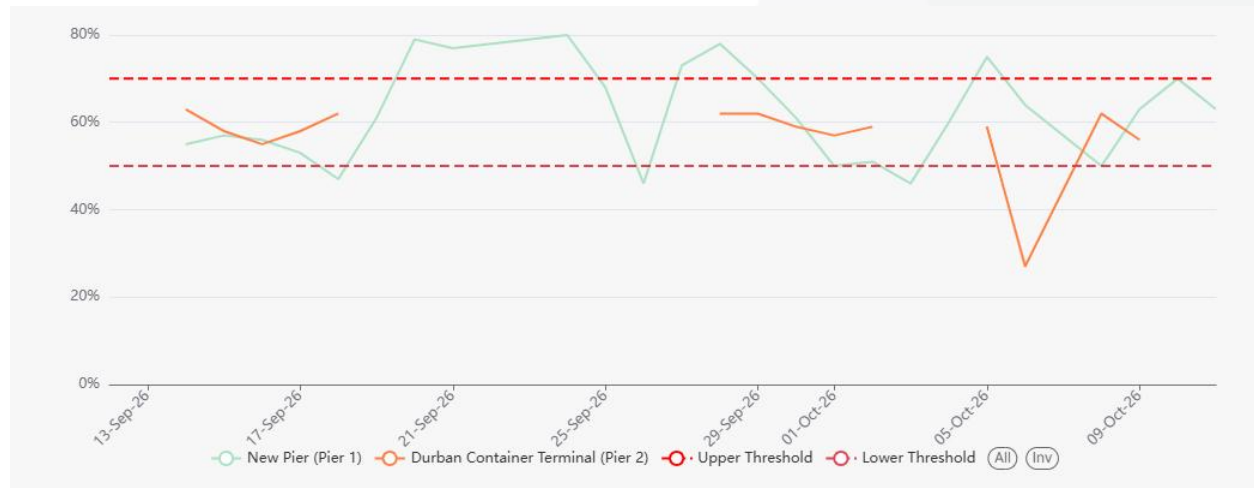
Source: Calculated from Marine Traffic AIS data, 2026. Updated 13/10/2026.

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

⁷ According to July 2026 data.

⁸ According to August 2026 data.

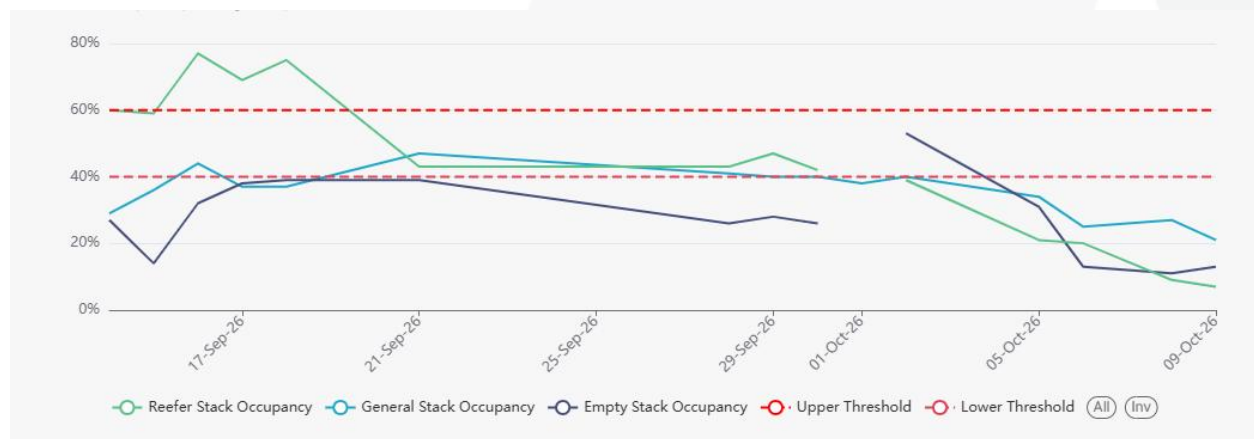
Figure 4 – Stack occupancy in Durban, general-purpose containers (12 September to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 11/10/2026.

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 (10 September to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 11/10/2026.

b. TNPA: September update

TNPA has released consolidated port statistics for September⁹, with most sub-sectors increasing since August:

- Container throughput totalled **460,166 TEUs**, which is significantly up on a monthly basis (by **↑20%**, m/m), but slightly down versus 2025 (**↓5%**, y/y).
- Total bulk cargo totalled **19.978 million tonnes**, which is up by **↑11%** (m/m), but down by **↓12%** (y/y) from last year in September.
- Vehicle throughput totalled **100,952 units**, which is up by **↑4%** (m/m), but down by **↓12%** (y/y).

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

⁹ Transnet. 2026. [Port statistics](#).

Table 5 – TNPA – Monthly volume and growth: September 2026

	August	September	Movement	% change
Containers (TEUs)	382,755	460,166	77,411	20%
Landed	201,008	239,930	38,922	19%
Shipped	181,747	220,236	38,489	21%
Dry bulk (MT)	14,730,753	16,057,007	1,326,254	9%
Liquid bulk (MT)	2,583,193	3,372,938	789,745	31%
Breakbulk (MT)	630,744	548,859	-81,885	-13%
Vehicles (Units)	96,945	100,952	4,007	4%
Total cargo (excl. Vehicles)	17,944,690	19,978,804	2,034,114	11%

Source: Calculated from [TNPA](#), updated 09/10/2026.

The main categories – containers and bulk – throughput levels are down versus last year:

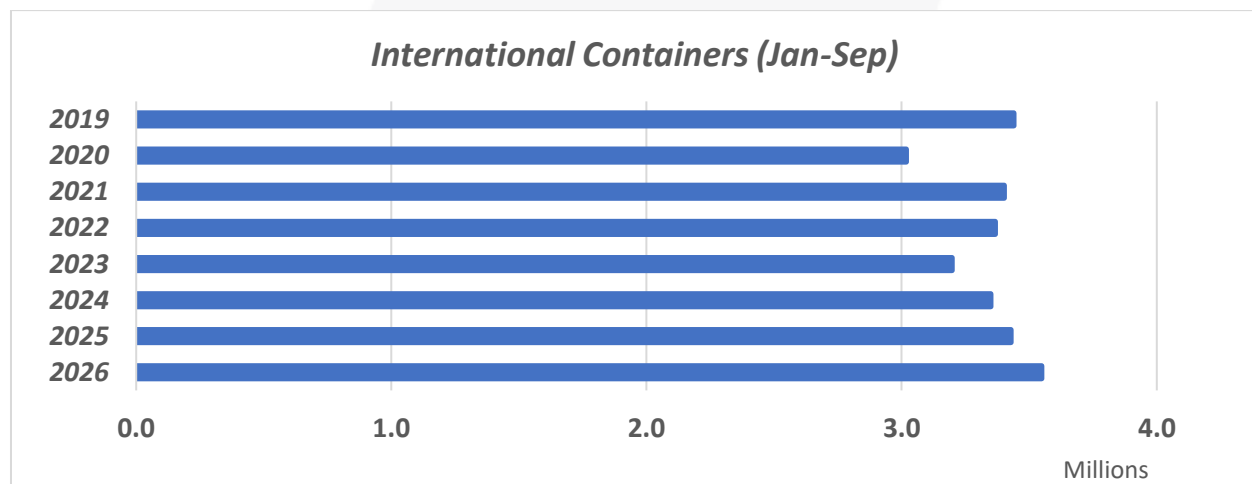
Table 6 – TNPA – Cyclical volume and growth: September 2019, 2025, and 2026

	2019	2025	2026	Growth: '19-'26	Growth: '25-'26
Containers (TEUs)	403,695	484,228	460,166	14%	-5%
Landed	200,467	234,336	239,930	20%	2%
Shipped	203,228	249,892	220,236	8%	-12%
Dry bulk (MT)	14,578,697	17,857,425	16,057,007	10%	-10%
Liquid bulk (MT)	3,158,423	4,075,415	3,372,938	7%	-17%
Breakbulk (MT)	335,677	696,944	548,859	64%	-21%
Vehicles (Units)	81,202	114,484	100,952	24%	-12%
Total cargo (excl. Vehicles)	18,072,797	22,629,784	19,978,804	11%	-12%

Source: Calculated from [TNPA](#), updated 09/10/2026.

Similar to Figure 2, the following table illustrates the year-to-date container throughput, which remains up by **↑3.5%** (y/y):

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



Source: Calculated from [TNPA](#), updated 09/10/2026.

c. Summary of port operations

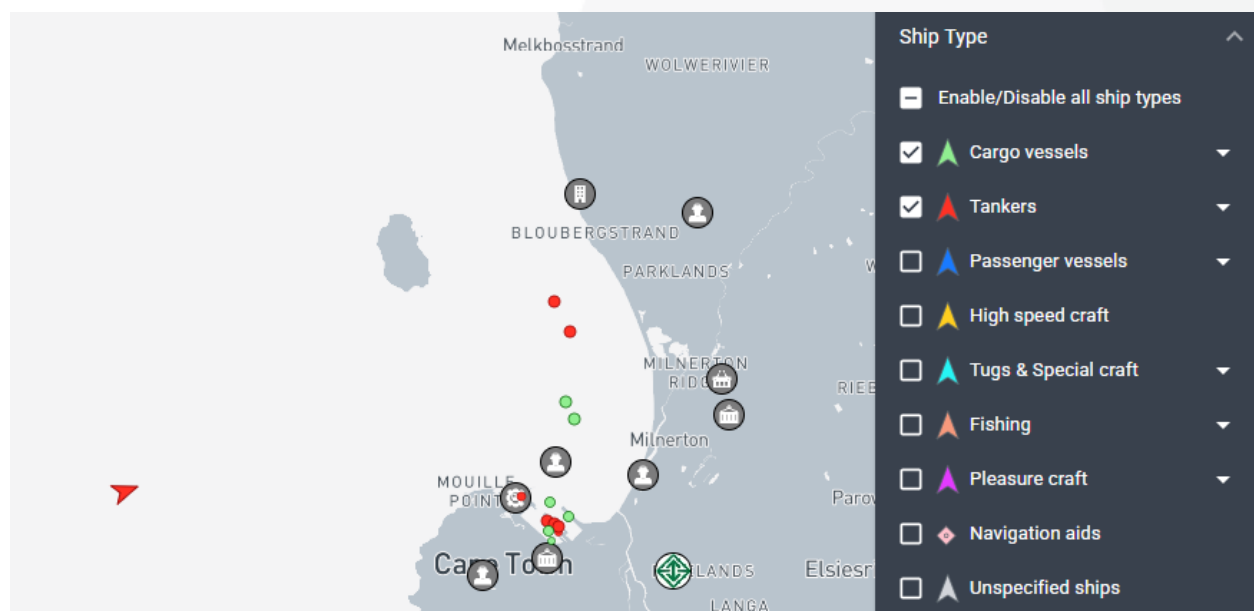
i. Cape Town

Cape Town Container Terminal recorded a decline of 34% in waterside volumes, dropping to 92% of target. Vessel turnaround time was low, with time waiting at anchorage minimal at 5 hours and time at berth around 39 hours. For the most part, the terminal had no vessels waiting at anchorage. However, vessels continue arriving late due to upstream Durban delays, and vessel bunching is occurring as part of broader service recovery efforts.

Cape Town Multi-Purpose Terminal reported an increase of approximately 36%, recovering above target volumes at 113%. Vessel turnaround time was minimal, with the vessel berthing at arrival and spending around 27 hours at berth.

AGL Terminal reported no vessel calling through the week.

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



Source: Marine Traffic. Updated 11/10/2026 at 14:00.

ii. Durban

Pier 1's performance remained steady, with a marginal 1% increase in waterside operations keeping the terminal's operations at 104% of target, a particularly strong achievement when considering weather delays through the week. Time spent at anchorage eased to 167 hours from 216 hours the previous week, and time spent at berth was 86 hours. The terminal operated with an average of four out of seven cranes and a full complement of RTGs throughout the week. The terminal had an average of four vessels at anchorage. The **TTT** for the week averaged **~50 minutes (↓7%, w/w)**, and the average **staging time** was **~33 minutes (↓33%)**.

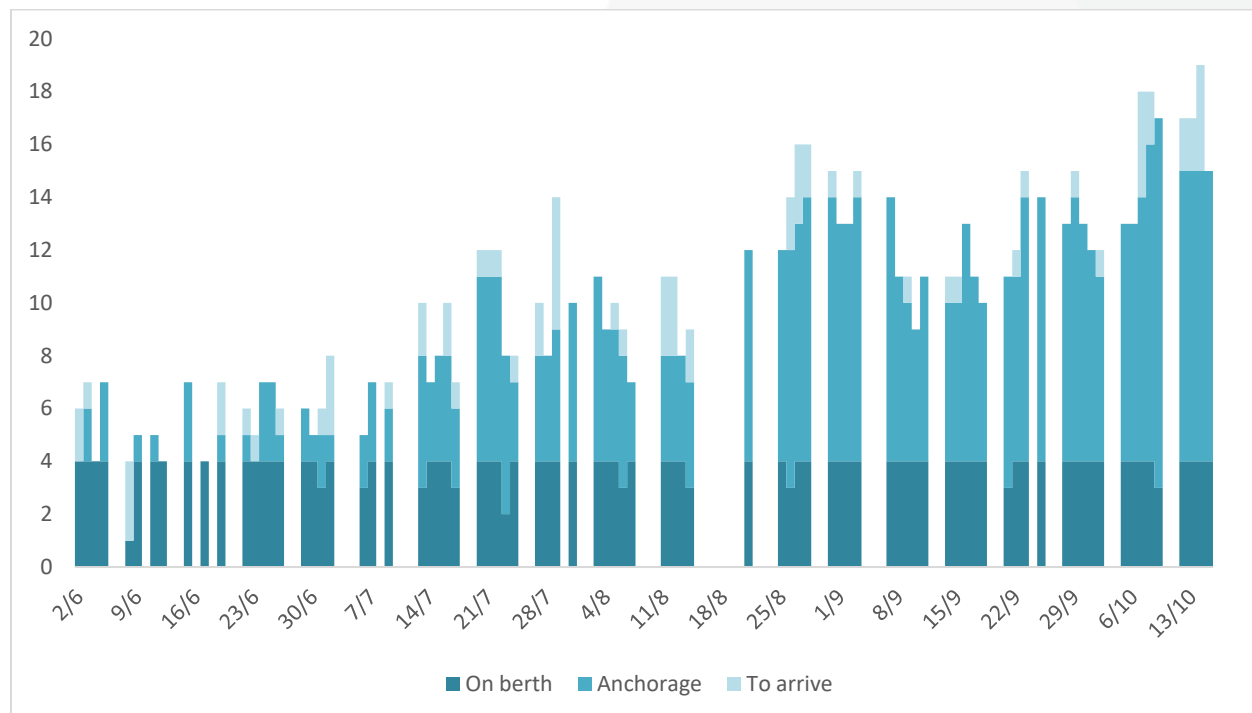
DGT recorded a modest improvement in waterside throughput during the latest reporting week, increasing by **↑6%**, while internal terminal conditions remained comparatively stable. DGT also reported operational improvements across several measures over the last two weeks, with **total container moves** up **↑15%**, **productive moves** up **↑15%**, **waterside moves** up **↑18%**, and **landside moves** up **↑14.5%**. However, **stabilisation and improvement from a depressed base should not be confused with full recovery**. Vessel

delays remain severe, averaging approximately **251 hours at anchorage** and **127 hours alongside**, while **11 vessels remain at anchorage** as at 15 October.

On 14 October, DGT's own assessment identified approximately **30,352 moves waiting at anchorage**, equivalent to **11.3 days of quayside work**. Approximately **10,000 containers are also expected to be discharged via Pier 1/Point**, which should relieve pressure at DGT, but will redistribute rather than eliminate pressure across the Durban container system.

The latest daily report further illustrates the variability: stack occupancy increased to **59.4%**, road imports on hand to **3,559 containers**, while gate performance fell to **2,111 moves** in the latest 24 hours. **The persistent vessel queue therefore remains the clearest evidence that sustained system recovery has not yet been achieved.**

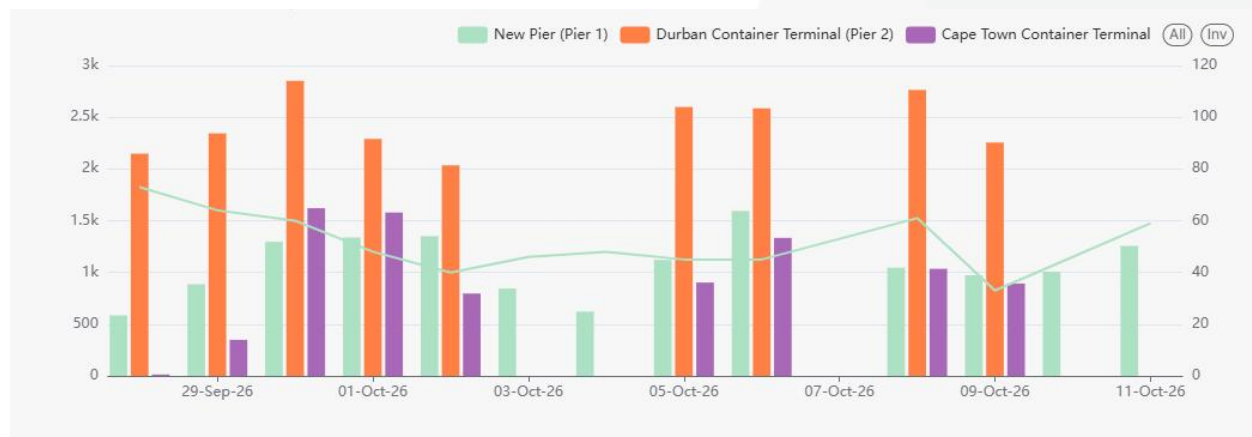
Figure 8 – DGT vessel count: on berth, at anchorage, to arrive



Source: Calculated from DGT

Durban Multi-Purpose Terminal posted a strong recovery, with volumes up 141%, exceeding target volumes at 119%. Vessels spent an average of 116 hours waiting at anchorage and 81 hours at berth, with an average of two vessels waiting at anchorage.

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 11/10/2026.

The queue of container vessels waiting outside Durban increased this week to **36 vessels**. On Wednesday morning (14 October), **15** (up from last week) container vessels were waiting outside at anchorage for Durban, **seven** for DGT, **three** for Point and **five** for Pier 1. The queue of dry (**ten**) increased, liquid (**five**) decreased, and breakbulk (**four**) increased:

Figure 10 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 11/10/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal reported a great improvement of 46%, recovering to 126% of target volumes, an impressive feat as the terminal struggled against weather delays throughout the week. Vessel turnaround times were within normal bands, with vessels spending an average of 56 hours waiting at anchorage and 67 hours at berth, with just one vessel waiting at anchorage. The terminal operated with a daily average of seven out of eight cranes and 24 out of 30 RTGs.

Port Elizabeth Container Terminal recorded a decline of 41%, falling to just 49% of target volumes, with the decline attributed to a reduction in vessel calls, likely as a result of congestion picking back up at the Port of Durban. Vessel turnaround times were low, with time at anchorage sitting at 16 hours and time at berth at an average of 28 hours. The terminal operated with an average of two out of three cranes and 10 out of 11 straddle carriers. Weather delays were reported on Monday.

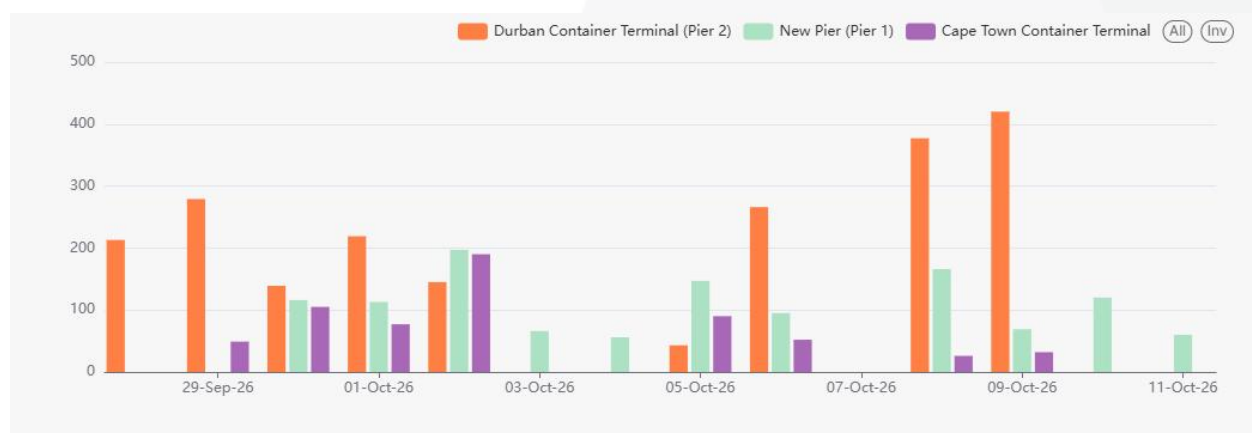
iv. Richards Bay

At RBCT, the daily average coal throughput for the week **increased** and averaged close to **179,000 tons** (**↑16%**, w/w) per day. With an average of **22 trains per day** being serviced, **in line with** the target of 22.

v. Transnet Freight Rail (TFR)

In the last week (5 to 11 October), rail cargo on the ConCor line out of Durban was reported at **1,906** containers, up by **↑24%** from the previous week's **1,754** containers.

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



Source: Calculated using data from Transnet, 2025. Updated 11/10/2026.

2. Air Cargo Update

a. International air cargo

The following table shows the inbound and outbound air cargo flows to and from ORTIA for the last week (5 to 11 October). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in October 2025 was **~1,030,816 kg**.

Table 7 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	666,628	4,666,396	↑6%
Volume outbound	495,919	3,471,431	↑11%
Total	1,162,547	8,137,827	↑8%

Courtesy of ACOC. Updated: 11/10/2026.

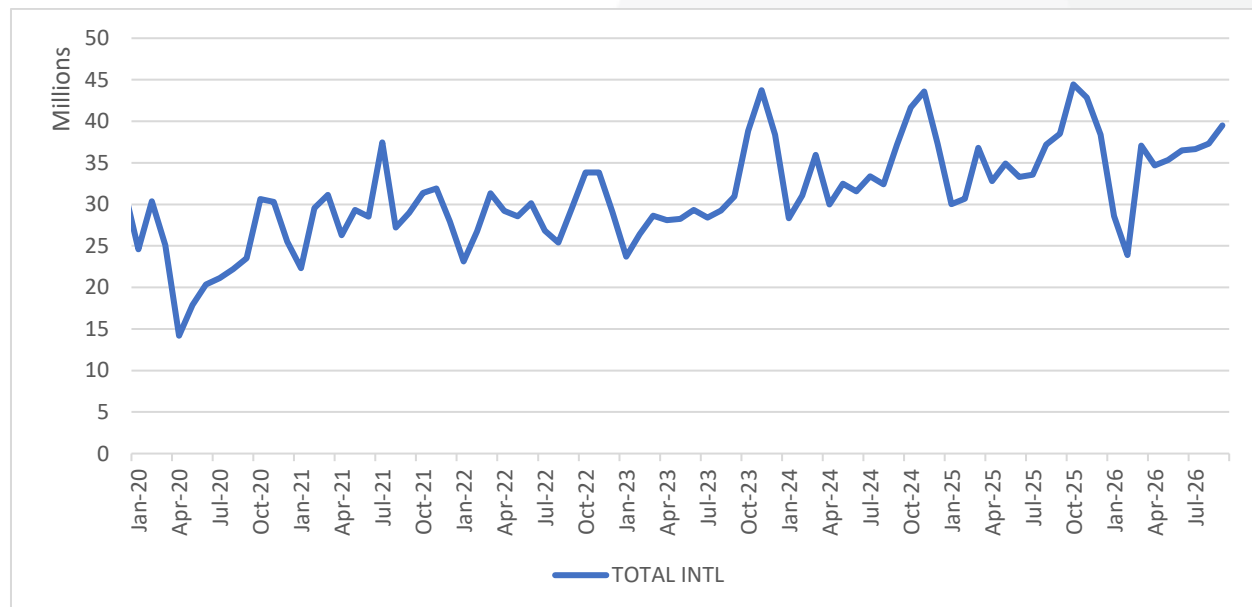
The latest international air cargo to and from ORTIA shows an increase in both inbound and outbound cargoes. For the week, the daily average inbound cargo amounted to **~666,500 kg** (**↑6%**, w/w) and outbound **~496,000 kg** (**↑11%**). Consequently, current volumes are up by **↑13%** (y/y).

For the full month of September, an increase was collectively witnessed – driven by Cape Town volumes – although Johannesburg and Durban saw reductions:

- Johannesburg decreased by **↓2%** (m/m) versus August but is stable against the same time last year (**↓0.1%**, y/y).
- Cape Town increased substantially by **↑48%** (m/m) and by **↑16%** (y/y) versus 2025.
- Durban decreased by **↓11%** (m/m) and by **↓20%** (y/y).
- Consequently, total international air cargo for September 2026 is up by **↑6%** (m/m) – and up by **↑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 to and from all terminals (monthly, kg millions)



Calculated from ACOC. Updated: 11/10/2026.

Jet fuel stock improved in the last week and is currently stable. The latest reported fuel stock days (as of Thursday morning, 15 October) per airport indicate:

- ORTIA: **6.7 days** (target: 5 days)
- CTIA: **4.7 days** (target: 4 days)
- Durban: **14.7 days** (target: 5 days)

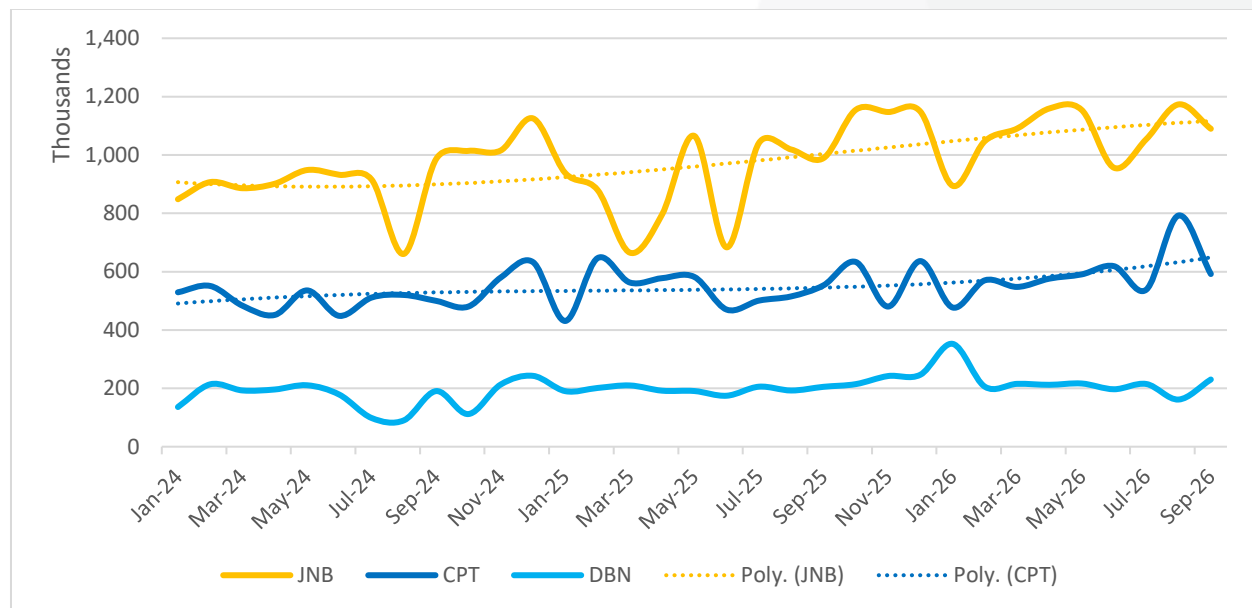
b. Domestic air cargo

For September, domestic volumes handled at our three main terminals differed significantly, but were down collectively month-on-month – but remain up versus the same time last year:

- Johannesburg decreased by **↓7%** (m/m) versus August – but is up by **↑10%** (y/y) versus 2025.
- Cape Town decreased by **↓25%** (m/m) but is up by **↑7%** (y/y) versus 2025.
- Durban increased by a substantial **↑42%** (m/m) and is up by **↑12%** (y/y) versus 2025.
- Consequently, total monthly domestic air cargo for September is down by **↓10%** (m/m) but remains up by **↑12%** (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 (5 to 11 October), movements increased slightly – by around **30 trucks a day**, as trains from KM4 to Maputo also decreased (at an average of **1.5 trains per day**).

- Truck volumes through the border post increased to **1,427 HGVs per day** (↑2%, w/w).
- Overall, queue times **increased slightly** to an average of **~5.5 hours** (↑22%) at the border.
- The average processing times **increased by the same magnitude** – to an average of **~5.3 hours** (↑23%) per crossing.

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

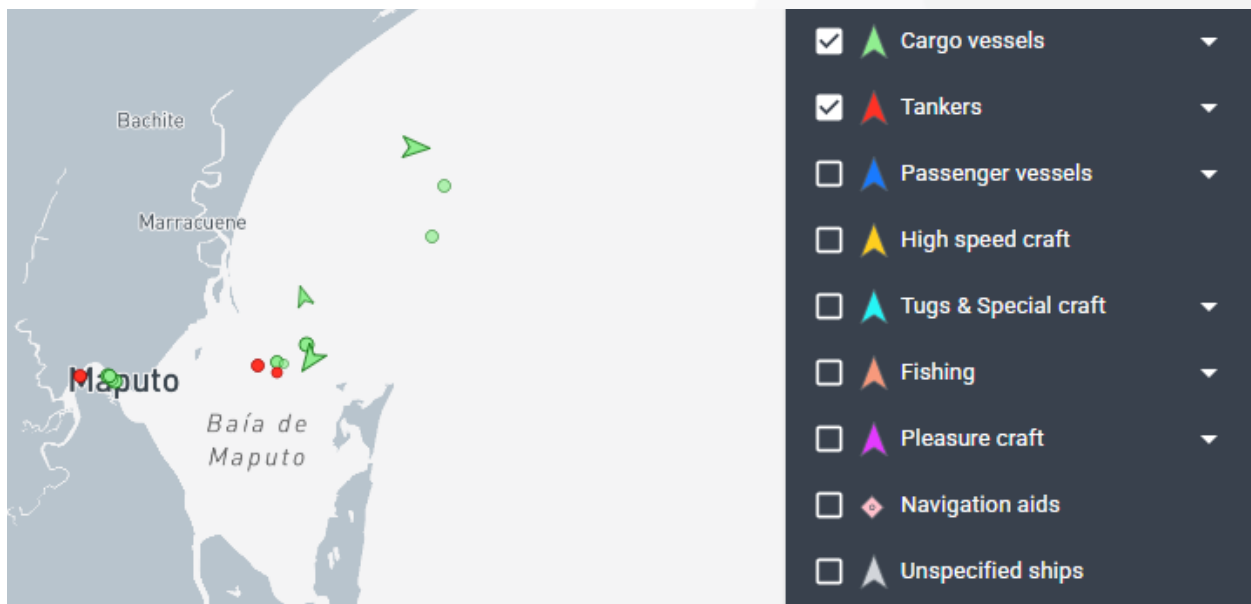
Table 8 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,427	1,392	1,086	160	51	65	50	287
% (w/w)	2%	1%	2%	-12%	24%	0%	-82%	4%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 11/10/2026.

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 11/10/2026 at 14:00.

b. SADC cross-border and road freight update

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

- Overall, the average queue time **decreased by nearly two hours this week**, as transit times **were mostly unchanged**.
 - The median border crossing times at South African borders decreased by **an hour and a half**, averaging **~8.7 hrs (↓13%)** for the week.
 - In contrast, the greater SADC region (excluding South African-controlled borders) was mostly unchanged – averaging **~8.5 hrs (no change)**.
1. **Lebombo / KM4 (Mozambique):**
 - a. From 10 October, approximately 50% of mineral-truck parking capacity will be temporarily closed for four months for rehabilitation, modernisation and paving.
 - b. Reduced staging capacity could exacerbate congestion along the N4 corridor.
 2. **Mozambique – Spare Tyre Requirements:**
 - a. Varying enforcement of the three-spare-tyre requirement continues, particularly in Tete.
 - b. Although authorities have reportedly agreed that legislative amendments are necessary, this has not been communicated effectively to enforcement officials.
 3. **DRC – Kanyaka Scanning and Parking:**
 - a. Transporters report disputed charges of \$55 for scanning and parking despite trucks remaining stationary in queues.
 - b. The scanner's reinstatement on 28 September has contributed to renewed congestion along the Lubumbashi–Kasumbalesa corridor.
 4. **DRC – Customs System Disruptions:**
 - a. The DGDA confirmed scheduled SYDONIA customs-system maintenance on 10–11 October, with potential interruptions to customs processing and cargo clearance.

5. Regional Border Congestion:

- Kasumbalesa remains particularly constrained, with reported delays of approximately five days for trucks entering the DRC from Zambia.
- Chirundu and Namanga have also recorded crossing times exceeding 24 hours, reflecting persistent regional processing and infrastructure bottlenecks.

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

Table 9 – Delays¹⁰ summary – South African borders¹¹ (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	518	20.6	5.2	20.4	15,540	3,626
Beitbridge	Zimbabwe-SA	508	3.9	1.2	3.6	15,240	3,556
Groblersbrug	SA-Botswana	238	11.3	1.4	11.2	7,140	1,666
Martin's Drift	Botswana-SA	170	2.2	0.2	2.1	5,100	1,190
Kopfontein	SA-Botswana	196	8.1	1.6	8.1	5,880	1,372
Tlokweng	Botswana-SA	35	0.8	0.2	0.5	1,050	245
Vioolsdrift	SA-Namibia	30	6.0	1.3	5.6	900	210
Noordoewer	Namibia-SA	20	2.1	0.5	2.1	600	140
Nakop	SA-Namibia	30	3.6	1.1	3.4	900	210
Ariamsvlei	Namibia-SA	20	1.0	0.4	1.0	600	140
Skilpadshek	SA-Botswana	276	12.0	2.5	12.0	8,280	1,932
Pioneer Gate	Botswana-SA	77	0.0	0.0	0.0	2,310	539
Ramatlabama	SA-Botswana	165	3.8	1.0	3.5	4,950	1,155
Ramatlabama	Botswana-SA	66	0.4	0.2	0.3	1,980	462
Lebombo	SA-Mozambique	1,375	5.5	2.1	5.3	41,250	9,625
Ressano Garcia	Mozambique-SA	1,363	2.0	0.3	1.6	40,890	9,541
Sum/Average		5,087	5.2	1.2	5.0	152,610	35,609

Source: Calculated from [TransAfricaBorder](#) & Crickmay, week ending 04/10/2026.

Table 10 – 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	7.4	2.3	7.0	9,600	2,240
Central Corridor	798	4.2	0.7	4.0	23,940	5,586
Dar Es Salaam Corridor	1,819	25.8	5.8	27.8	54,570	12,733
Maputo Corridor	2,738	3.8	1.2	3.4	82,140	19,166
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,559	17.1	3.3	17.6	106,770	24,913
Northern Corridor	2,817	0.3	0.0	0.3	92,520	21,588
WBNLD Corridor	845	3.7	0.8	3.6	25,350	5,915
Trans Cunene Corridor	100	3.2	0.8	3.0	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700

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 Ramatlabama border post between South Africa and Botswana has been added.

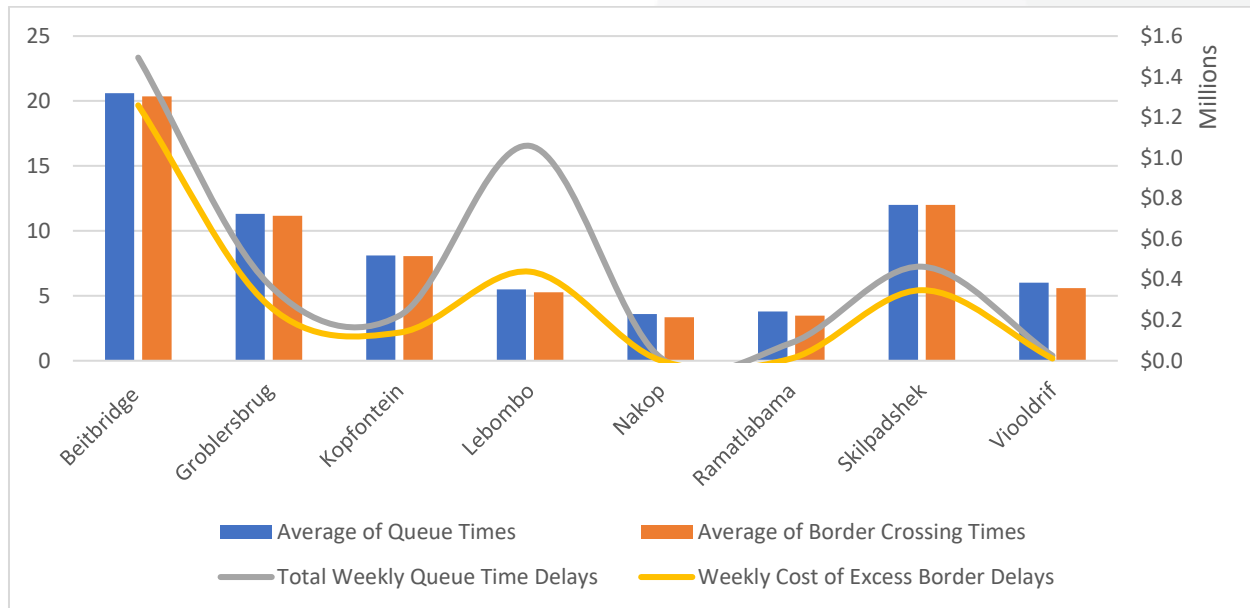
¹² Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Trans Oranje Corridor	116	22.1	3.3	21.8	3,480	812
Sum/Average	13,339	8.3	1.7	8.5	408,180	95,242

Source: Calculated from [TransAfricaBorder](#) & Crickmay, week ending 04/10/2026.

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

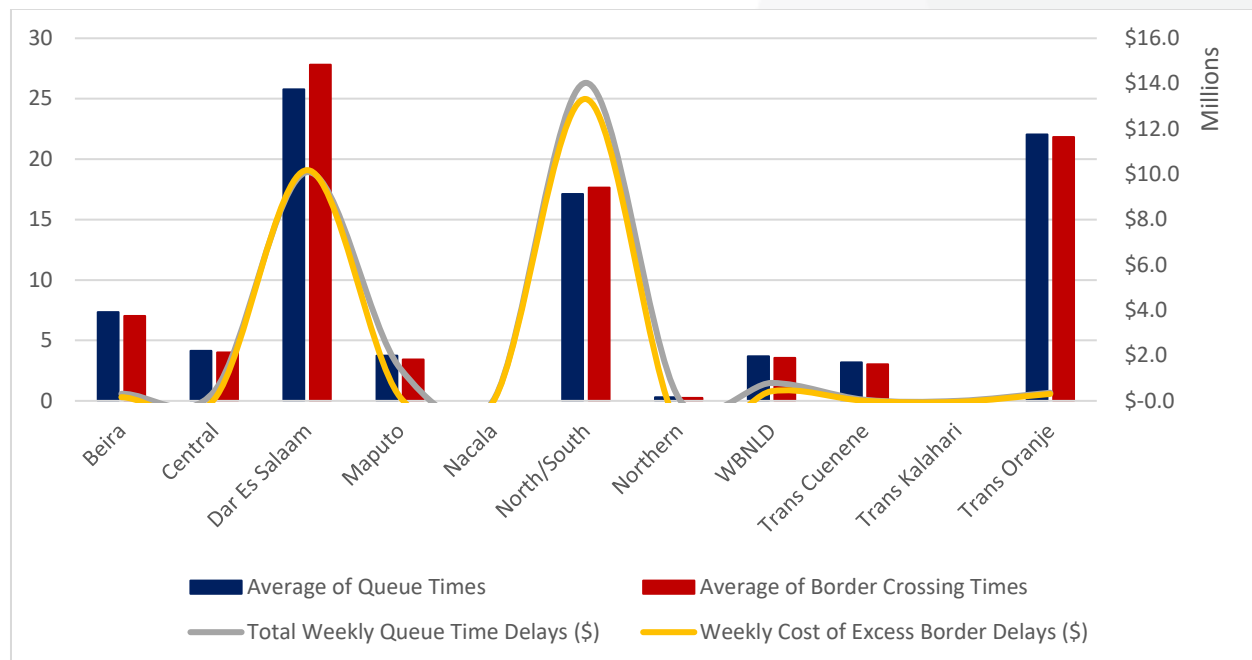
Figure 15 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: Calculated from [TransAfricaBorder](#) & Crickmay week ending 04/10/2026.

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 04/10/2026.

In summary, cross-border queue time averaged **~8.3 hours** (down by **~1.9 hours** from the previous week's **~10.2 hours**), indirectly costing the transport industry an estimated **\$27.6 million (R457 million)**. Furthermore, the week's average cross-border transit times also hovered around **~8.5 hours** (down by **~0.1 hours** from the previous week's **~8.7 hours**), at an indirect cost to the transport industry of **\$23.4 million (R386 million)**. The total indirect cost for the week amounts to an estimated **~\$51 million (R843 million)**, up by **↑8.3%** from the **~R776 million** in the previous report).

4. International Update

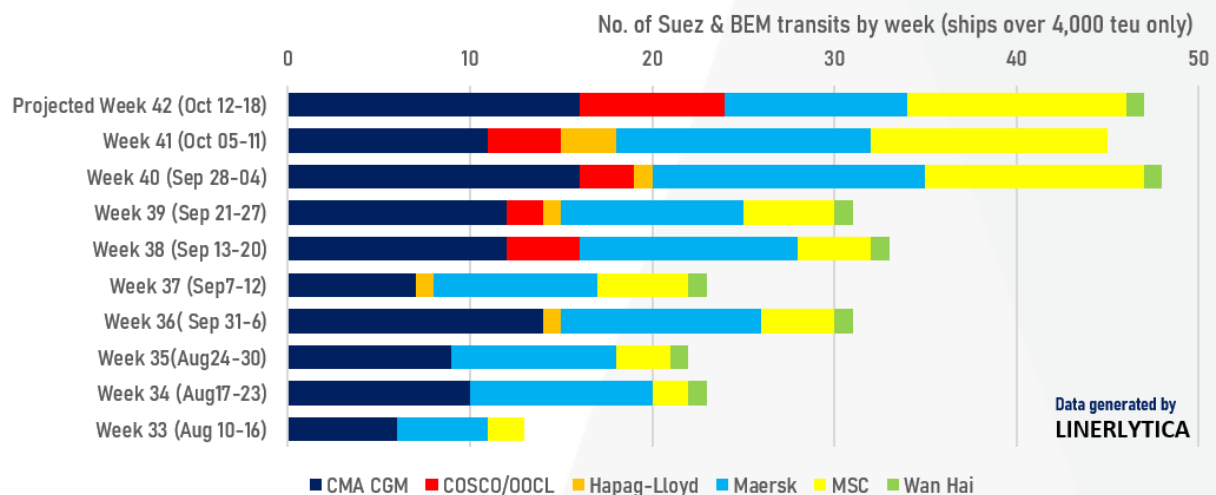
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Red Sea – Cape of Good Hope transits

Container carriers are accelerating their return to the Red Sea/Suez corridor despite persistent security risks. *Linerlytica* reports that weekly transits by containerships exceeding 4,000 TEU are approaching 50, with all four major alliances now offering regular westbound Asia–North Europe services through Suez. It anticipates a broad return during Q1 2027; Drewry expects transits to reach approximately 80% of pre-diversion levels by February.

Figure 17 – Containerships on the Suez/Bab el Mandeb route



Source: Linerlytica

Crucially, *Drewry* estimates that a 24,000-TEU vessel saves only around **\$1 million per round trip** (\$43 per slot) compared with Cape routing, before war-risk insurance, which could outweigh these savings.

Table 11 – Suez versus Cape of Good Hope economics

Illustrative metric	Via Suez	Via COGH
Round-voyage duration	97 days	124 days
Est. round-voyage cost (excl. war-risk)	\$17m	\$18m
War-risk premium at 0.3% of \$225 hull value, for two passages	\$1.35m	-

Source: Drewry

Carriers are therefore prioritising shorter transit times, vessel utilisation and competitive positioning. The shift reduces TEU-mile demand and releases effective capacity, increasing downward pressure on freight rates, while introducing further routing uncertainty for cargo owners and potentially reducing vessels passing South Africa via the Cape.

Elsewhere, the Singapore-flagged container ship *GFS Pride* sank in the Strait of Hormuz after being struck by an unidentified projectile; all 21 crew were evacuated safely, while a second Singapore-flagged vessel, *GFS Giselle*, sustained hull damage but reached safe anchorage. The incidents underscore heightened maritime security risk in the Strait, which normally carries about a fifth of global oil and gas shipments and has been effectively disrupted amid Iranian attacks and the US naval blockade.¹³

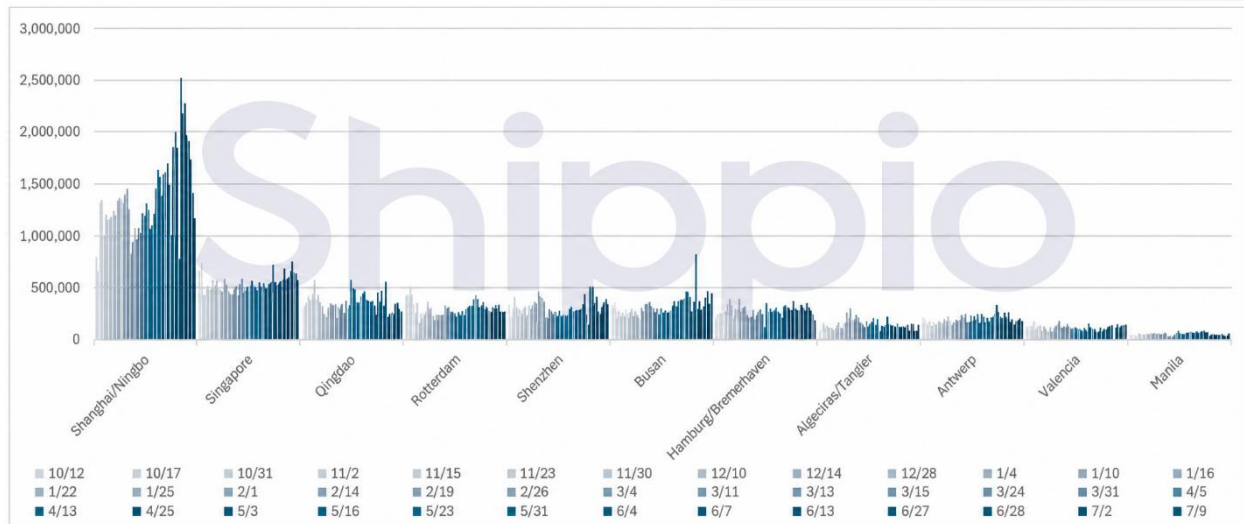
ii. Global port congestion

Global port congestion is easing, although regional imbalances persist. China's Golden Week (1–7 October) factory shutdowns and reduced export activity helped clear vessel backlogs, with Shanghai–Ningbo's combined containership capacity at anchor or in port declining by 33% between 27 September and 9 October. *Linerlytica* nevertheless reports persistent congestion across Southeast and South Asia, alongside

¹³ Gritten, D. 14/10/2026. Container ship hit by projectile sinks in Strait of Hormuz, Singapore says.

increasing idle and dry-docked vessel capacity. Vessel bunching remains disruptive, while *Drewry* projects only 34 blank sailings (5% of scheduled departures) across major East–West trades during weeks 42–46.

Figure 18 – Trends in total TEU of container vessels waiting at anchor or in port at major ports



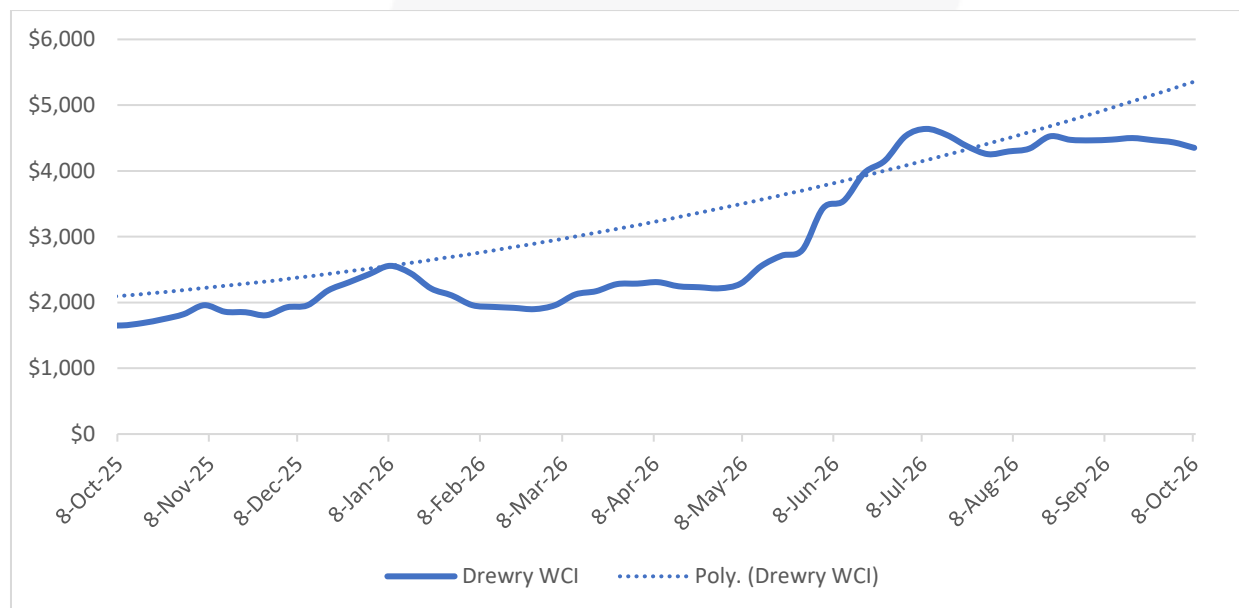
Source: [Shippio](https://www.shippio.com)

For the Port of Durban (all terminals), *Linerlytica* reports a “queue-to-berth” ratio of **1.04** on 11 October.

iii. Container freight and charter rates

Drewry’s World Container Index (WCI) declined by **↓1.9% (w/w) to \$4,351 per 40-foot container** on 8 October, reflecting weaker demand during China’s Golden Week, with Shanghai–Los Angeles rates falling by **↓3% to \$7,624** and Shanghai–Rotterdam by **↓2% to \$3,337**. *Drewry* anticipates broadly stable rates in the near term, although increased vessel capacity, renewed Suez transits and continued geopolitical uncertainty could sustain market volatility. Rates have increased by **2.6x** in the last two months:

Figure 19 – *Drewry World Container Index (\$/40ft)*

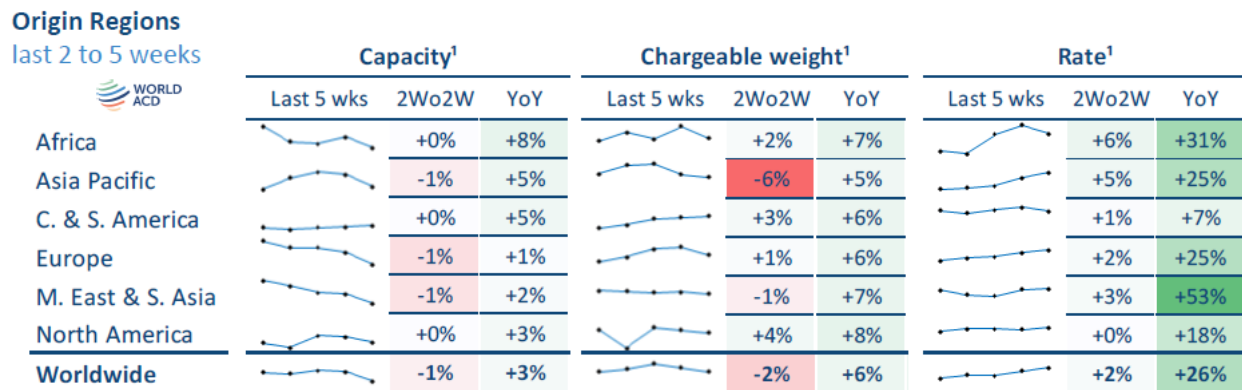


Source: Calculated from [Drewry](https://www.drewry.com)

b. Global air cargo industry

According to World ACD, international air cargo strengthened in September, with global volumes increasing by **↑3%** (m/m) and **↑9%** (y/y), supported by strong growth from Asia Pacific and North America (**↑10%** each). Average worldwide freight rates increased by **↑1%** (m/m) and remained **↑25%** above September 2025, reflecting persistent geopolitical disruptions and elevated fuel costs. Rates from the Middle East and South Asia were particularly inflated (**↑52%**, y/y).

Figure 20 – Chargeable weight and rates (last five weeks)



Source: WorldACD

Global capacity remained relatively stable, increasing by approximately **↑4%** (y/y) in week 40, comprising **↑7%** growth in freighter capacity and **↑2%** in passenger belly-hold capacity. However, Gulf capacity remained **↓17%** below pre-conflict levels. Despite September's strong performance, weekly volumes declined by **↓2%** in week 40, while freight rates continued edging upwards.

ENDS¹⁴

¹⁴**DISCLAIMER:** The Cargo Movement Report is a free industry information service compiled by the Southern African Association of Freight Forwarders NPC ("SAAFF"). The underlying data is obtained from third-party operators and industry sources, which remain the originators of that data. SAAFF collates, cleans and consolidates it in good faith. SAAFF does not independently verify the source data.

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