

Cargo Movement Update #304¹

Date: 18 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)	42,484	48,401	90,885	41,568	47,358	88,926	↑2%
Air Cargo (tons)	4,602	4,162	8,764	4,666	3,471	8,138	↑8%

Monthly Snapshot

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

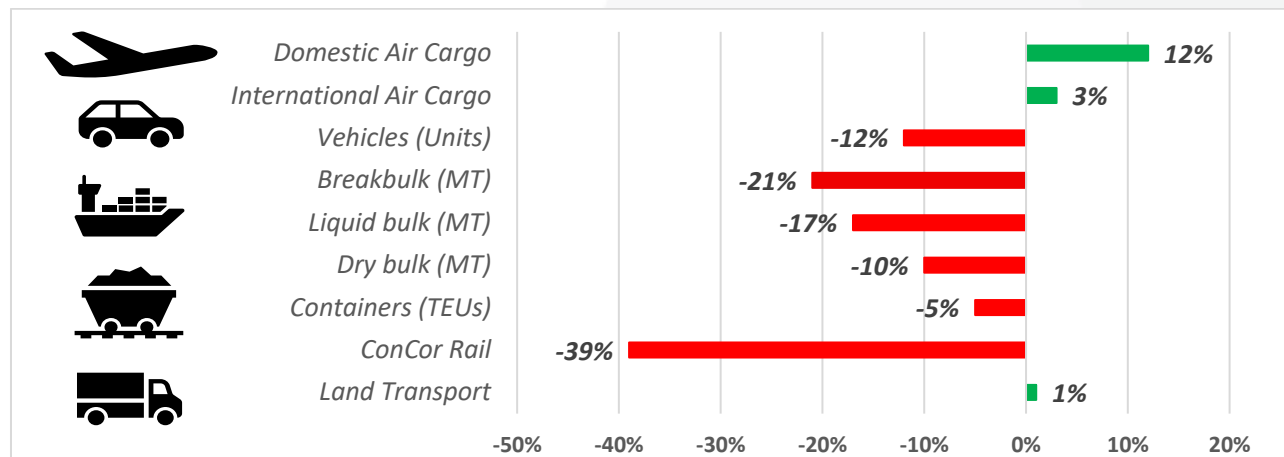
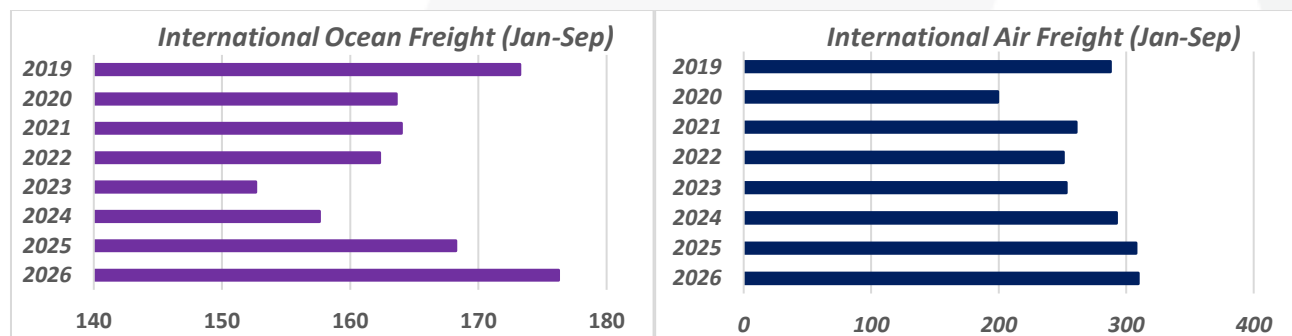


Figure 2 – Year-to-date flows 2019-2026⁵: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **12,984 TEUs** was handled per day, with **12,586 TEUs** projected for next week.
- **DGT latest: ~4,088 TEUs/day** (↓14%, w/w). Yard remains stable; anchorage **queue @11 vessels**.
- Rail cargo handled out of Durban was reported at **1,269 containers**, down by **↓33%** versus last week.
- Cross-border queue: **↓0.9 hrs**; transit: **↓1.0 hrs**; SA borders: **~8.3 hrs** (↓4%); SADC: **~7.4 hrs** (↓13%).
- The WTO has revised its 2026 global trade growth forecast sharply upwards to **↑3.9%** (from **↑1.9%**).
- Global air cargo volumes declined by **↓1%**, as average full-market rates remained stable at **\$3.13/kg**.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 304th 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 **12,984 TEUs** was handled daily, an increase from **12,704 TEUs** the previous week.

DGT update: Waterside performance deteriorated again this week, with **volumes down ↓14%** and **average anchorage delays rising to 274 hours** — more than 11 days — while around **11 vessels** remained waiting offshore. Internal yard conditions remain comparatively stable, but the vessel backlog continues to dominate the outlook. Current analysis implies approximately **18 additional days through affected supply chains**; at around **3,300–3,400 moves/day**, the terminal is effectively servicing incoming demand rather than materially reducing the backlog. Even at approximately **4,600 moves/day** (a rate which DGT has previously demonstrated to achieve) the existing queue would take roughly a month to clear.

Elsewhere, port operations in Durban remain under significant pressure, with Pier 1 becoming a significant bottleneck with three cranes out of service, leaving the terminal operating with only four cranes across two berths, and extended anchorage times. In the Western Cape, CTCT had a strong week, recovering well above target with minimal anchorage times, though the MPT had a quiet week concluding the previous week's vessel and no new calls were received. In the Eastern Cape, Port Elizabeth surged to 274% of target, likely driven by a resumption of diverted cargo. Ngqura eased slightly but remained well above target, with anchorage times holding at 2 days.

Global trade and global container shipping continue to undergo structural adjustment amid resilient but increasingly uneven trade growth. Interestingly, this week, the WTO revised its 2026 merchandise trade forecast upwards to **↑3.9%**, supported by AI-related investment, while services growth was downgraded to **↑3.3%**. For carriers, *Sea-Intelligence* highlights growing specialisation in liner networks, with the average number of carriers per physical service declining to **2.65**, signalling greater service differentiation. Meanwhile, *Alphaliner* reports that **63% of deployed Far East–Europe capacity** now operates on services incorporating Red Sea/Suez transits, although mixed routings persist. A continued bugbear: global port congestion remains elevated, with approximately **4.18 million TEU at anchorage**, particularly across Asia. Lastly, container freight rates strengthened for a second consecutive week, reflecting continued market volatility despite easing congestion at major Asian gateways.

The latest international air cargo to and from ORTIA shows a substantial increase in outbound cargoes. For the week, the daily average inbound cargo amounted to **~657,500 kg (↓1%, w/w)** and outbound **~594,500 kg (↑20%)**. Consequently, current volumes are up by **↑21% (y/y)**.

Global air cargo volumes declined by **↓1% (w/w)**, reflecting a third consecutive weekly contraction, although demand remained **↑9%** higher year-on-year. Average freight rates held steady at **\$3.13/kg (↑29%, y/y)**, while spot rates reached **\$3.55/kg**. Capacity contracted by **↓1% (w/w)**, with Middle Eastern disruptions and elevated jet-fuel prices sustaining pricing pressures.

On the N4 corridor, movements decreased slightly – by around **31 trucks a day**, as trains from KM4 to Maputo were stable (at an average of **1.5 trains per day**). Truck volumes through the border post decreased to **1,396 HGVs per day (↓2%, w/w)**. Overall, queue times **decreased slightly** to an average of **~5 hours (↓9%)** – although the queue length on Thursday, 15 October reached **15km**, see below) at the border. The average processing times **also decreased** – to an average of **~4.2 hours (↓21%)** per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time **decreased by nearly an hour this week**, as transit times **decreased by the same magnitude**. The median border crossing

times at South African borders decreased by **half an hour**, averaging **~8.3 hrs (↓4%)** for the week. In contrast, the greater SADC region (excluding South African-controlled borders) **decreased by slightly more than an hour** – averaging **~7.4 hrs (↓13%)**. This week, on average, **two** SADC border posts took a day or more to cross, namely Kasumbalesa (taking around **five days** to cross from the **Zambian side**) and **Katima Mulilo**.

Other developments included **(1)** temporary disruptions to Zimbabwe's ZIMRA customs system, subsequently resolved; **(2)** continued enforcement uncertainty surrounding Mozambique's three-spare-tyre requirement, alongside persistent congestion at Lebombo, where truck queues reached approximately 15 km; and **(3)** unusually high tipper-truck volumes at Ramatlabama, resulting in yard saturation and temporary processing suspensions.

As South Africa takes stock of its finances through this week's Medium-Term Budget Policy Statement (MTBPS), another important development deserves attention: the welcome relaunch of the *State of Logistics™ 2026 for South Africa*.⁶ Produced by GAIN Group, this important publication quantifies national freight flows, modal allocation and logistics costs, while examining infrastructure constraints, systemic inefficiencies and their economic consequences. With logistics costs projected to reach **R1.156 trillion (14.6% of GDP)** in 2026, the findings warrant serious reflection. As Prof Jan Havenga emphasised at the launch, logistics is not merely about efficiency; it can also stimulate economic growth. Ultimately, better infrastructure, institutional stewardship and integrated planning are essential. We will unpack the report's findings and implications for South Africa's trade competitiveness over the coming weeks.

⁶ Gain Group. 22/10/2026. [STATE OF LOGISTICS 2026 for South Africa](#).

Contents

Weekly Snapshot	1
Monthly Snapshot.....	1
Key Notes	1
Executive Summary.....	2
Contents	4
1. Ports Update	5
a. Container flow overview	5
b. Summary of port operations.....	7
i. Cape Town.....	7
ii. Durban	8
iii. Eastern Cape	10
iv. Richards Bay	10
v. Transnet Freight Rail (TFR).....	10
2. Air Cargo Update	11
a. International air cargo	11
3. Road and Regional Update	12
a. Lebombo border post update	12
b. SADC cross-border and road freight update.....	13
4. International Update	16
a. Global trade outlook	16
b. Global shipping industry	17
i. Increasing specialisation of liner networks, capacity deployment, and port congestion.....	17
ii. Container freight.....	19
c. Global air cargo industry	20

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 12 to 18 October (measured in TEUs)

7-day flow reported (12/10/2026 – 18/10/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Gateway Terminal (Previously Pier 2)	4,088	28,617	↓14%
New Pier (Pier 1)	2,178	15,249	↑1%
Cape Town Container Terminal	2,184	15,288	↑35%
Ngqura Container Terminal	2,723	19,062	↓10%
Port Elizabeth Container Terminal	1,134	7,935	↑464%
Other	676	4,734	↓29%
Total	12,984	90,885	↑2%

Source: Calculated from TPT, 2026. Updated 18/10/2026.

An average of ~12,984 TEUs (↑2%) was handled per day for the last week (12 to 18 October, Table 2). Consequently, throughput was slightly above the projected average of ~12,694 TEUs (↑2% actual versus projected). For the coming week, a decreased average of ~12,586 TEUs (↓3%) is predicted to be handled (12 to 18 October, Table 3).

Table 3 – Container Ports – Weekly flow projected for 19 to 25 October (measured in TEUs)

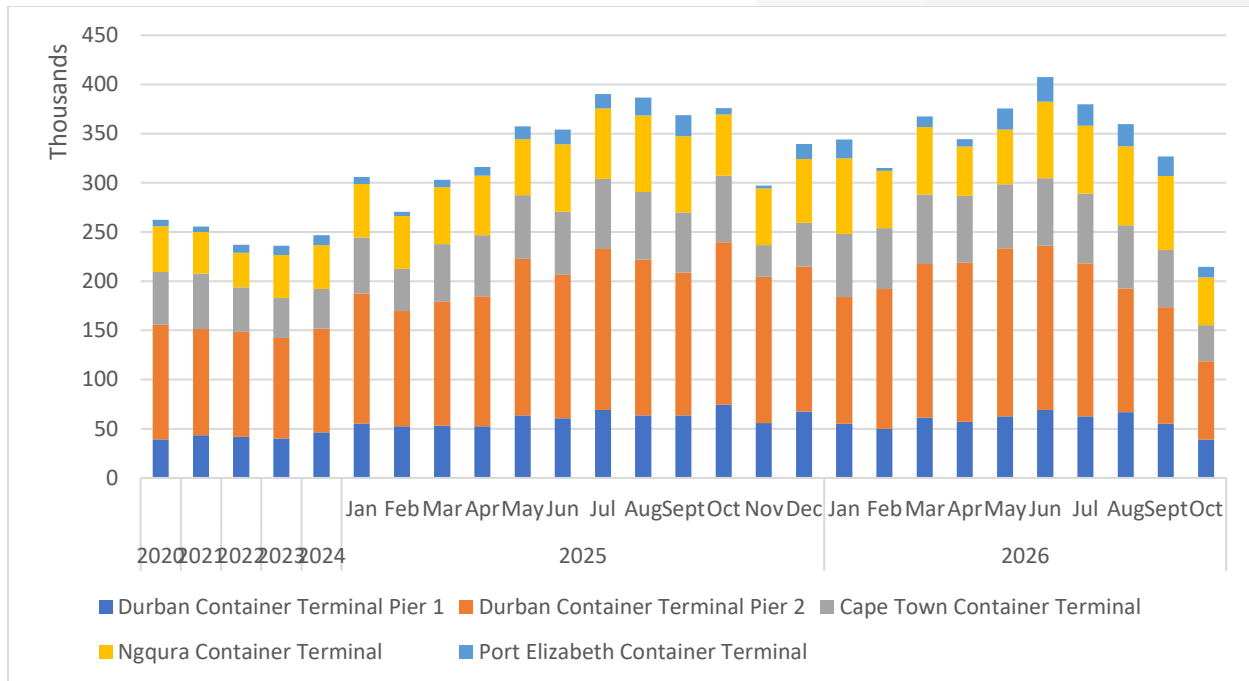
7-day flow projected (19/10/2026 – 25/10/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Gateway Terminal (Previously Pier 2) ⁷	5,066	35,464	↑24%
New Pier (Pier 1)	2,092	14,646	↓4%
Cape Town Container Terminal	1,773	12,409	↓19%
Ngqura Container Terminal	2,404	16,827	↓12%
Port Elizabeth Container Terminal	414	2,899	↓63%
Other	837	5,859	↑24%
Total	12,586	88,104	↓3%

Source: Calculated from TPT, 2026. Updated 18/10/2026.

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.

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 18/10/2026.

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 ⁸	0.0	1.3
Durban	DGT	7.1	3.6
Durban	Pier 1	4.3	3.5
East London	MPT ⁹	0.3	1.9
Ngqura	NCT	2.6	3.3
Port Elizabeth	PECT	1.4	1.4

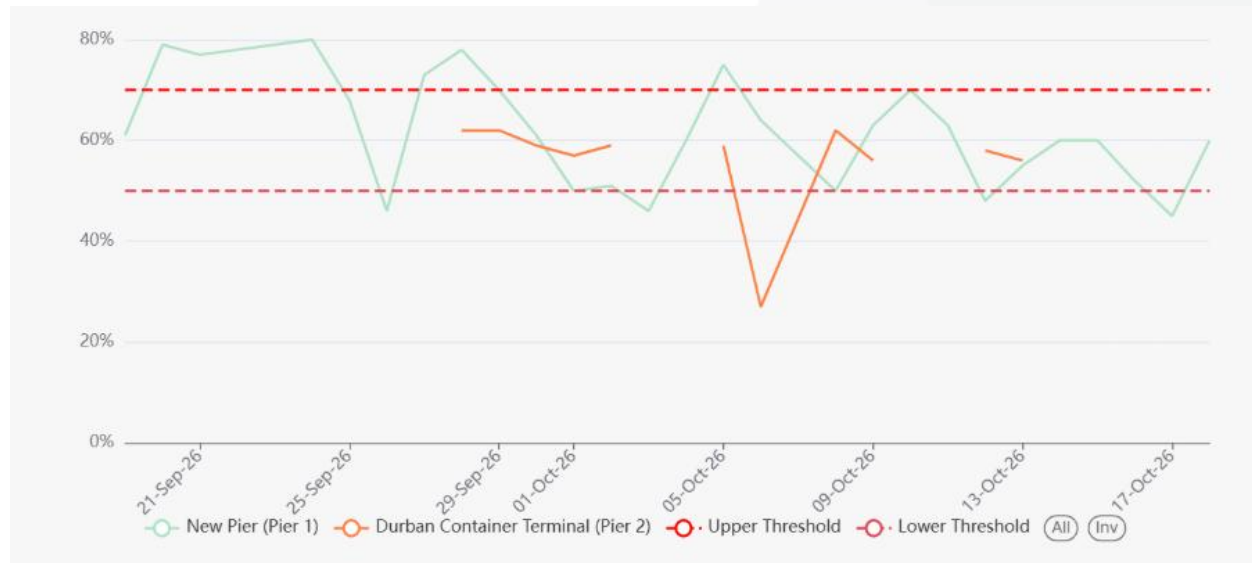
Source: Calculated from Marine Traffic AIS data, 2026. Updated 20/10/2026.

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

⁸ According to July 2026 data.

⁹ According to August 2026 data.

Figure 4 – Stack occupancy in Durban, general-purpose containers (19 September to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 18/10/2026.

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 (21 September to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 18/10/2026.

b. Summary of port operations

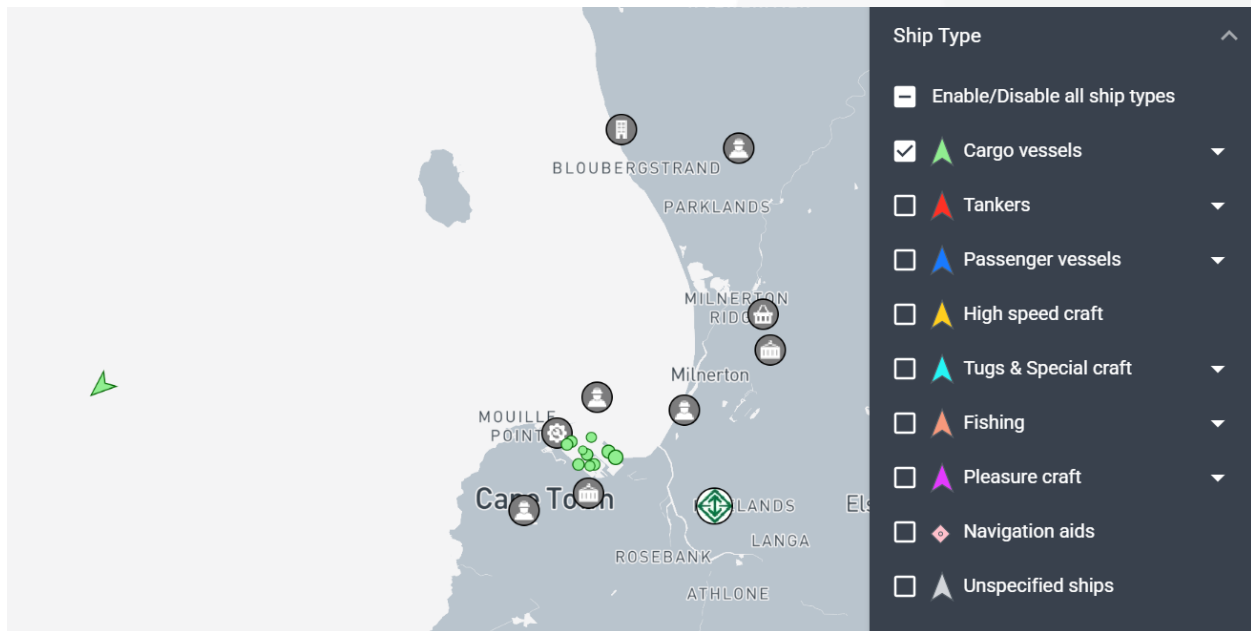
i. Cape Town

Cape Town Container Terminal reported a strong recovery, with volumes up by 35% to 123% of target volume for the period. Time spent at anchorage was minimal at 2 hours, and time at berth was around 37 hours, with vessels berthing nearly at arrival. The terminal operated with an average of eight out of nine cranes and 29 of 32 RTGs. Strong winds are expected in the coming week.

Cape Town Multi-Purpose Terminal was quiet, with volumes down 97% and reaching just 3% of target volume, with the vessel from the previous week concluding operations and no new vessels called. The terminal had an average of two out of three cranes and two out of five straddle carriers available.

AGL Terminal reported no vessel operations for the reporting period.

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



Source: Marine Traffic. Updated 18/10/2026 at 14:00.

ii. Durban

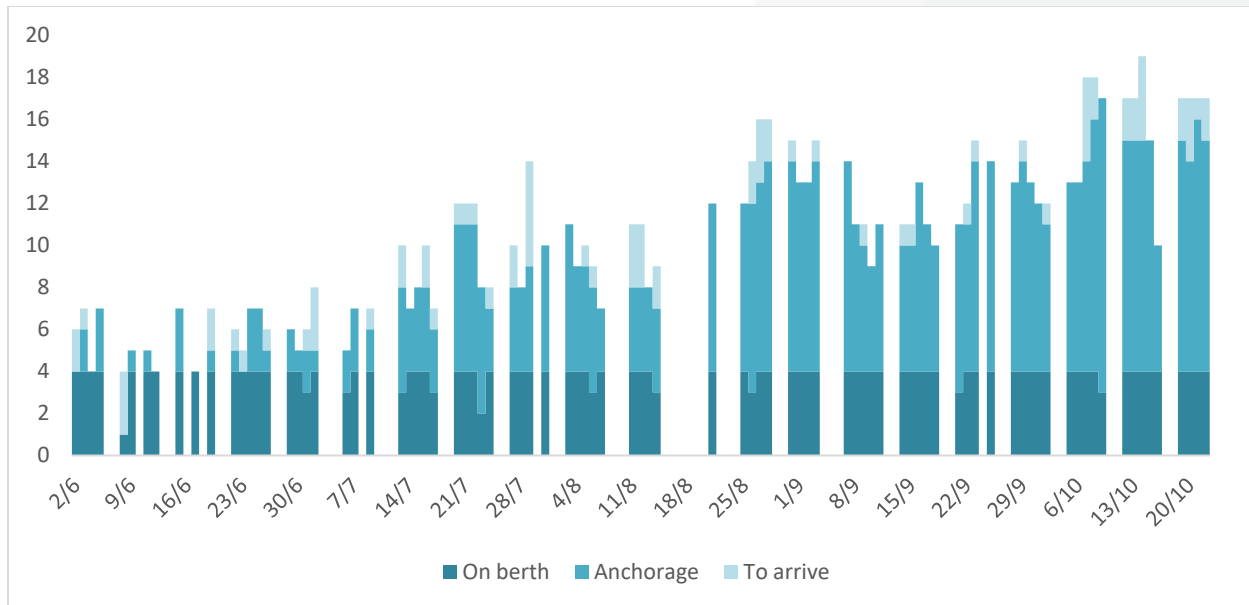
Pier 1 was effectively flat, with a marginal 1% increase holding the terminal at 104% of target for the week. Anchorage time improved to 125 hours from 167 hours in the previous week, with vessels spending an average of 70 hours at berth. In spite of this, there remained an average of six vessels waiting at anchorage throughout the week, as the port continues to work towards clearing the again growing backlog. The terminal operated with an average of four out of seven cranes and a full complement of RTGs throughout the week, with the lack of crane availability adding further aggravation to an already congested port. The **TTT** for the week averaged **~36 minutes (↓28%, w/w)**, and the average **staging time** was **~26 minutes (↓21%)**.

Durban Gateway Terminal recorded a decline of **↓14%** in waterside volumes, as time at anchorage rose to **274 hours — over 11 days** — and time at berth was an average of **98 hours**. An average of eleven vessels were waiting at anchorage.

Durban Gateway Terminal recorded a **↓14% decline in waterside volumes**, while vessel delays deteriorated further, with average anchorage time reaching **274 hours (more than 11 days)** and berth time averaging **98 hours**. An average of **11 vessels** remained at anchorage, with the daily queue fluctuating between **10 and 12 vessels** this week. Encouragingly, internal yard conditions remain comparatively stable, with stack occupancy easing from **63.5% to 55.3%** between 19 and 22 October.

However, the waterside backlog remains the overriding concern. Current analysis implies approximately **18 additional days** through affected supply chains. At roughly **3,300 moves/day**, close to DGT's **3,400-move target**, virtually all capacity is absorbed by incoming demand, leaving little scope to reduce the backlog. Even sustaining approximately **4,600 moves/day** — around **one-third higher**, and at levels which DGT has previously demonstrated — would take **roughly a month to clear the existing queue**. The outlook therefore remains prolonged despite improved internal stability.

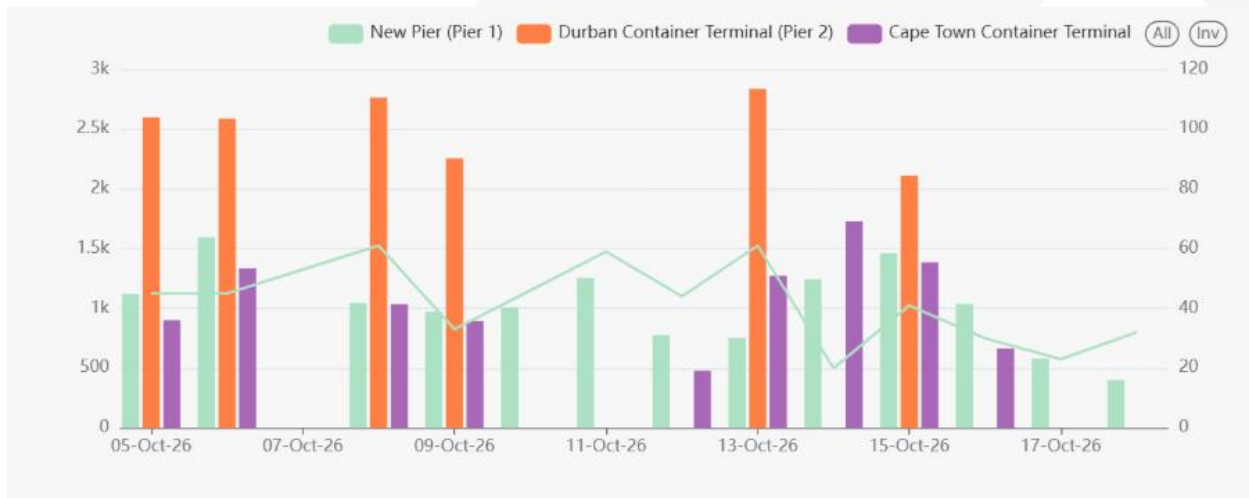
Figure 7 – DGT vessel count: on berth, at anchorage, to arrive



Source: Calculated from DGT

Durban Multi-Purpose Terminal recorded a decline of approximately 17% in waterside volumes, falling just below the target at 99%.

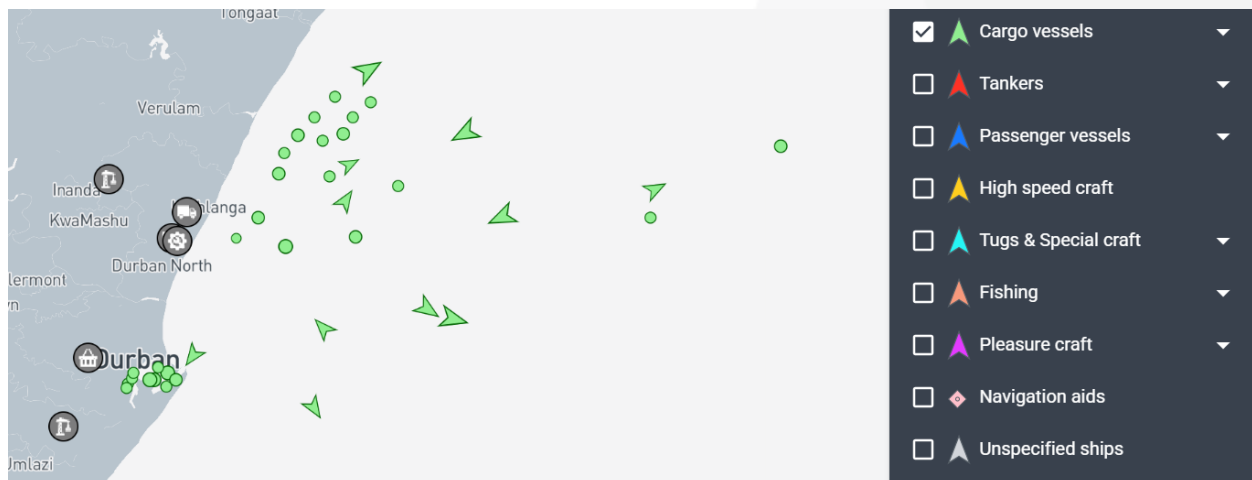
Figure 8 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 18/10/2026.

The queue of container vessels waiting outside Durban decreased this week to **31 vessels**. On Wednesday morning (21 October), **14** (down from last week) container vessels were waiting outside at anchorage for Durban, **eight** for DGT, **three** for Point and **three** for Pier 1. The queue of dry (**eight**) decreased, liquid (**three**) decreased, and breakbulk (**zero**) decreased:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 18/10/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal recorded a decline of 10%, remaining above target at 113%. Vessels spent an average of 50 hours at anchorage and 62 hours at berth, with an average of two vessels waiting at anchorage throughout the week. The terminal operated with an average of seven out of eight cranes and 24 of 30 RTGs.

Port Elizabeth Container Terminal surged, with volumes up by 464% to 274% of target volumes. This extraordinary increase is likely driven by a resumption of diverted cargo from Durban. Vessels spent an average time of 16 hours waiting at anchorage and 24 hours at berth. The terminal operated with an average of two out of three cranes and 10 of 11 straddle carriers available throughout the week. Weather delays are anticipated for the coming week.

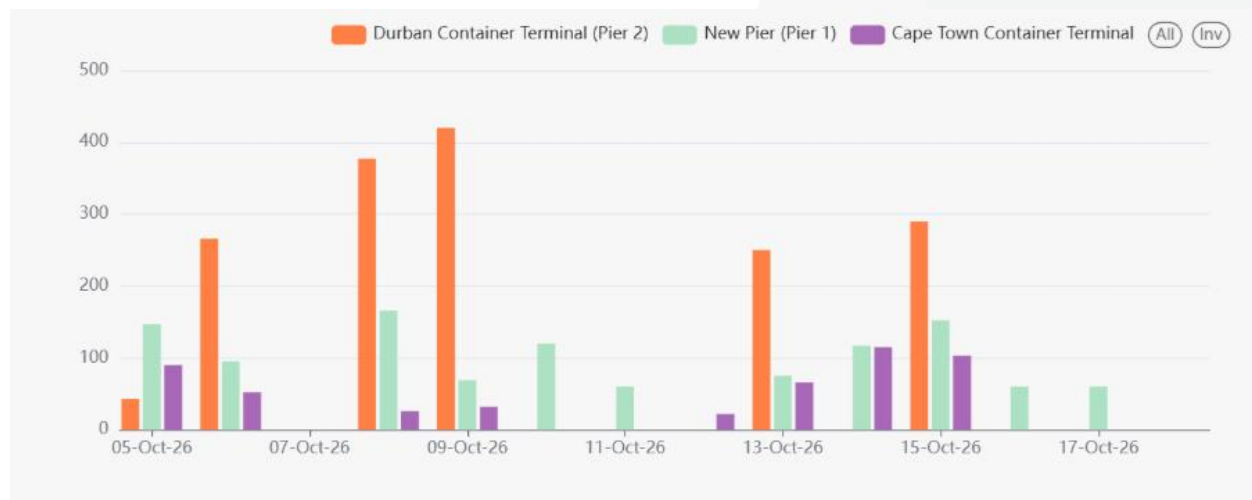
iv. Richards Bay

At RBCT, the daily average coal throughput for the week **increased** and averaged close to **201,000 tons** (**↑12%**, w/w) per day. With an average of **23 trains per day** being serviced, **above** the target of 22.

v. Transnet Freight Rail (TFR)

In the last week (12 to 18 October), rail cargo on the ConCor line out of Durban was reported at **1,269** containers, down by **↓33%** from the previous week's **1,906** containers.

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



Source: Calculated using data from Transnet, 2025. Updated 18/10/2026.

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 (12 to 18 October). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in October 2025 was ~1,030,816 kg.

Table 5 – International inbound and outbound cargo from OR Tambo

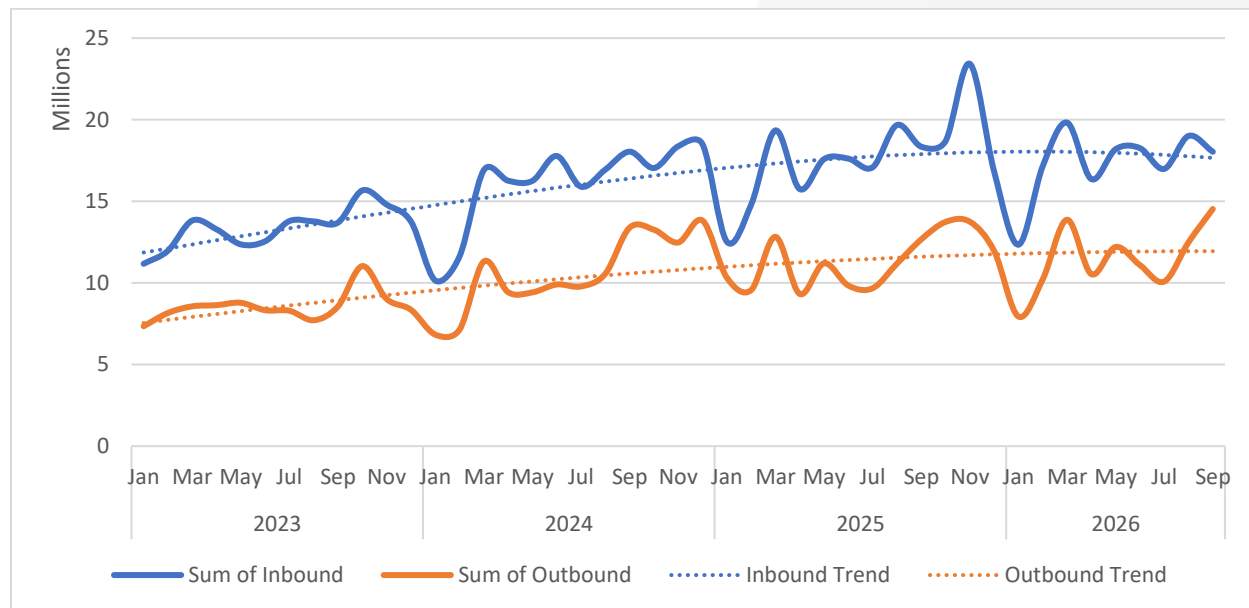
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	657,472	4,602,303	↓1%
Volume outbound	594,551	4,161,855	↑20%
Total	1,252,023	8,764,158	↑8%

Courtesy of ACOC. Updated: 18/10/2026.

The latest international air cargo to and from ORTIA shows a substantial increase in outbound cargoes. For the week, the daily average inbound cargo amounted to ~657,500 kg (↓1%, w/w) and outbound ~594,500 kg (↑20%). Consequently, current volumes are up by ↑21% (y/y).

The following figure shows the international air cargo flows to and from ORTIA since the start of 2023:

Figure 11 – International cargo to and from all terminals (monthly, kg millions)



Calculated from ACOC. Updated: 18/10/2026.

Jet fuel stock improved in the last week and is currently stable. The latest reported fuel stock days (as of Wednesday morning, 21 October) per airport indicate:

- ORTIA: **6 days** (target: 5 days)
- CTIA: **5 days** (target: 4 days)
- Durban: **11.5 days** (target: 5 days)

3. Road and Regional Update

a. Lebombo border post update

In the last week (12 to 18 October), movements decreased slightly – by around **31 trucks a day**, as trains from KM4 to Maputo were stable (at an average of **1.5 trains per day**).

- Truck volumes through the border post decreased to **1,396 HGVs per day** (↓2%, w/w).
- Overall, queue times **decreased slightly** to an average of **~5 hours** (↓9% – although the queue length on Thursday, 15 October reached **15km**, see below) at the border.
- The average processing times **also decreased** – to an average of **~4.2 hours** (↓21%) per crossing.

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

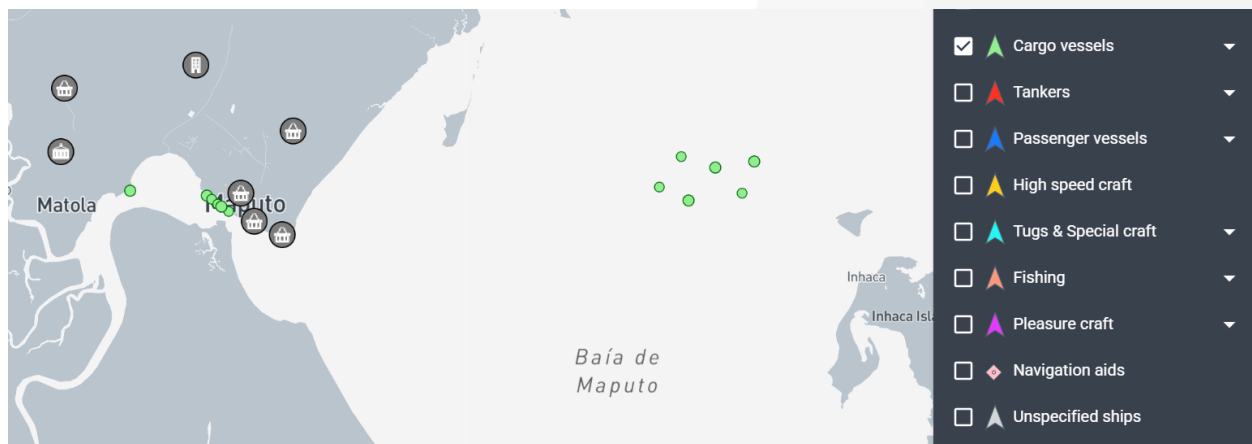
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,396	1,403	1,051	183	44	74	53	281
% (w/w)	-2%	1%	-3%	12%	-18%	11%	4%	-2%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 18/10/2026.

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 18/10/2026 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 September:

Table 7 – HGVs – Main South African borders (both directions)

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	16,372	-6%	9,189	-11%	25,561	-8%
Groblersbrug	7,031	-2%	5,182	-4%	12,213	-3%
Kopfontein	6,222	-5%	1,401	12%	7,623	-2%
Lebombo	40,457	-10%	39,942	-9%	80,399	-10%
Ramatlabama	5,066	-6%	2,922	-9%	7,988	-7%
Skilpadshek	8,330	-6%	2,612	-6%	10,942	0%

Source: TransAfricaBorder, 16/10/2026.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts decreased by a substantial **↓8% (m/m)** during September. Northbound traffic (Eastbound for Lebombo) decreased across the board – notably at **Lebombo (↓10%)**, **Beitbridge**, **Ramatlabama** and **Skilpadshek** (all down by **↓6%**). Southbound traffic (Westbound for Lebombo) decreased most notably at **Lebombo (↓10%)**, **Beitbridge (↓8%)**, and **Ramatlabama (↓7%)**.

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 an hour this week**, as transit times **decreased by the same magnitude**.
- The median border crossing times at South African borders decreased by **half an hour**, averaging **~8.3 hrs (↓4%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) **decreased by slightly more than an hour** – averaging **~7.4 hrs (↓13%)**.

1. Zimbabwe – ZIMRA Customs System Disruption:

- ZIMRA experienced a prolonged customs-system outage, initially attributed to clearing agents' inability to access the online platform.

- b. The disruption affected customs processing but was reportedly resolved later that afternoon.

2. Mozambique – Spare-Tyre Requirements:

- a. Inconsistent enforcement of Mozambique's three-spare-tyre requirement continues, with transporters reporting fines despite previously announced amendments.
- b. The lack of formal implementation and communication continues to create uncertainty for cross-border operators.

3. Botswana – Ramatlabama Border Congestion:

- a. Unusually high truck volumes, particularly tipper trucks, have resulted in yard saturation and temporary suspensions of processing.
- b. Increased traffic reportedly includes trucks crossing through Ramatlabama before subsequently entering Zimbabwe via Plumtree.

4. Lebombo / N4 Corridor (Mozambique):

- a. Border systems remain operational, with customs processing continuing despite persistent congestion.
- b. Truck queues reportedly extended approximately 15 km on Thursday, 15 October.
- c. Longer-term operational constraints remain unresolved, although corrective measures are being implemented to improve traffic flow.

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

Table 8 – 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	537	20.6	5.3	19.4	16,110	3,759
Beitbridge	Zimbabwe-SA	553	4.5	1.2	4.2	16,590	3,871
Groblersbrug	SA-Botswana	228	15.4	1.6	11.5	6,840	1,596
Martin's Drift	Botswana-SA	172	2.5	0.3	1.5	5,160	1,204
Kopfontein	SA-Botswana	220	7.7	2.0	5.2	6,600	1,540
Tlokweng	Botswana-SA	38	0.7	0.2	0.4	1,140	266
Vioolsdrift	SA-Namibia	30	2.4	2.1	4.4	900	210
Noordoewer	Namibia-SA	20	2.4	0.5	2.4	600	140
Nakop	SA-Namibia	30	3.3	0.4	3.4	900	210
Ariamsvlei	Namibia-SA	20	1.3	0.4	1.1	600	140
Skilpadshek	SA-Botswana	287	14.6	2.3	13.2	8,610	2,009
Pioneer Gate	Botswana-SA	92	0.0	0.0	0.0	2,760	644
Ramatlabama	SA-Botswana	227	3.2	1.4	5.5	6,810	1,589
Ramatlabama	Botswana-SA	87	0.6	0.2	0.3	2,610	609
Lebombo	SA-Mozambique	1,476	5.0	1.5	4.2	44,280	10,332
Ressano Garcia	Mozambique-SA	1,450	2.4	0.3	2.2	43,500	10,150
Sum/Average		5,467	5.4	1.2	4.9	164,010	38,269

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

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.

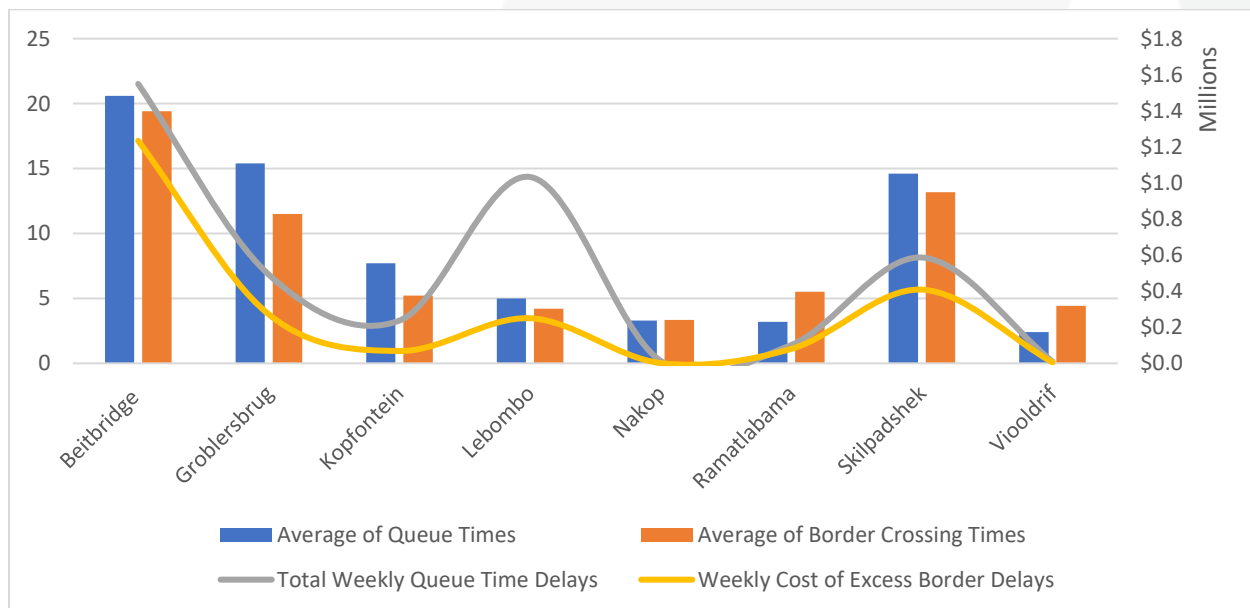
Table 9 – Delays summary – Corridor perspective

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	6.2	1.4	7.3	9,600	2,240
Central Corridor	798	1.5	0.2	1.9	23,940	5,586
Dar Es Salaam Corridor	1,819	23.1	5.1	22.3	54,570	12,733
Maputo Corridor	2,926	3.7	0.9	3.2	87,780	20,482
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,615	16.0	3.4	15.8	108,450	25,305
Northern Corridor	2,817	0.6	0.2	0.7	92,520	21,588
WBNLD Corridor	981	3.9	0.9	3.6	29,430	6,867
Trans Cunene Corridor	100	2.4	0.9	2.8	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	21.2	3.7	25.3	3,480	812
Sum/Average	13,719	7.4	1.6	7.5	419,580	97,902

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:

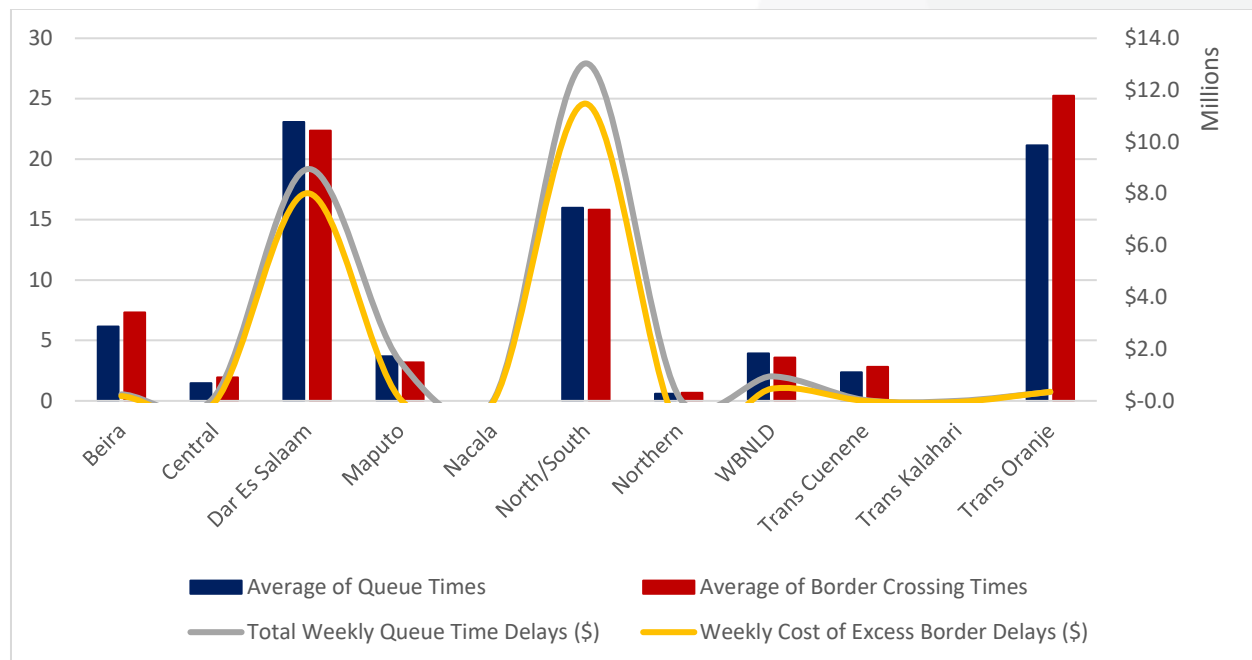
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 04/10/2026.

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

Figure 14 – 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 **~7.4 hours** (down by **~0.9 hours** from the previous week's **~8.3 hours**), indirectly costing the transport industry an estimated **\$25.4 million (R418 million)**. Furthermore, the week's average cross-border transit times also hovered around **~7.5 hours** (down by **~1.0 hours** from the previous week's **~8.5 hours**), at an indirect cost to the transport industry of **\$19.3 million (R318 million)**. The total indirect cost for the week amounts to an estimated **~\$44.7 million (R736 million, down by ↓13% from the ~R843 million in the previous report)**.

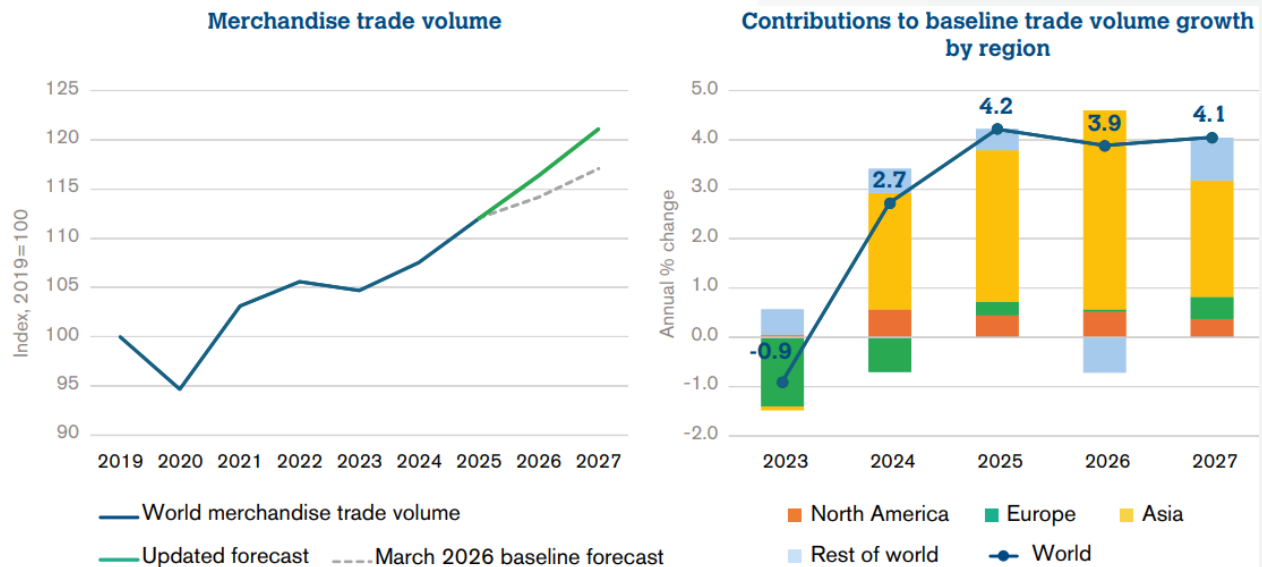
4. International Update

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

a. Global trade outlook

The WTO has revised its 2026 global merchandise trade growth forecast sharply upwards to **↑3.9%** (from **↑1.9%**), reflecting resilient demand driven primarily by AI-related investment. AI-enabling goods accounted for **47% of merchandise trade growth** in value terms during H1 2026, offsetting disruptions to energy and fertiliser shipments. Conversely, commercial services trade growth was downgraded to **↑3.3%** (from **↑4.8%**), as Middle Eastern conflict continues to constrain transport, tourism and other services. Overall, global goods and services trade volumes are projected to expand by **↑3.7%** in 2026 and **↑4.7%** in 2027, conditional on geopolitical stabilisation. Significant downside risks remain, including elevated energy prices, potential moderation in AI investment and persistent trade uncertainty.

Figure 15 – World merchandise trade volume growth, 2019-2027



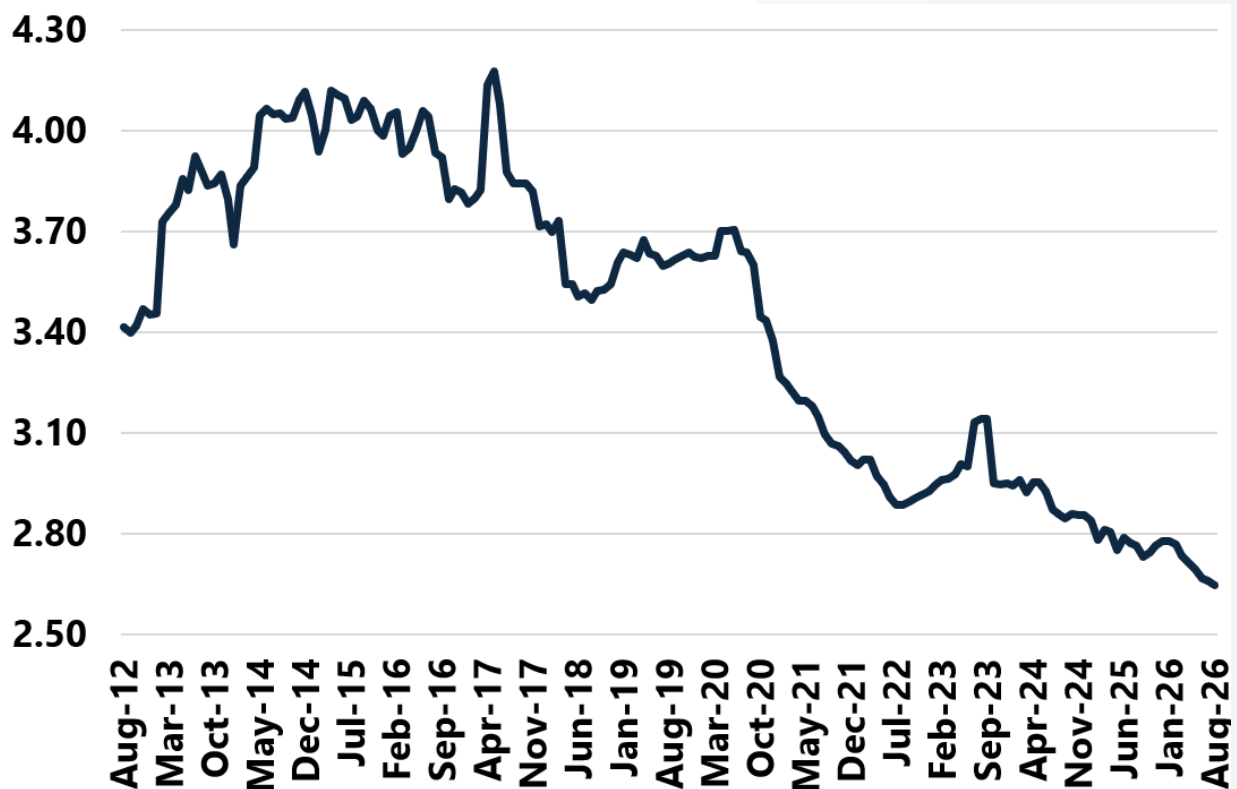
Source: [WTO](http://www.wto.org)

b. Global shipping industry

i. Increasing specialisation of liner networks, capacity deployment, and port congestion

Sea-Intelligence reports a structural shift in global container shipping, as carriers increasingly move away from extensive vessel-sharing arrangements towards more specialised, independently operated networks. Historically, Vessel Sharing Agreements (VSAs) enabled shipping lines to maintain broad geographical coverage while marketing essentially identical services under different brands, limiting genuine service differentiation. However, the number of active deep-sea services has risen from approximately 250 in 2012–2013 to nearly 380 in 2026, while the average number of carriers offering space on each service has declined significantly, from **4.12 in 2014–2016** to **just 2.65 by August 2026**.

Figure 16 – Physical Liner Services to Shipping Lines Multiplier

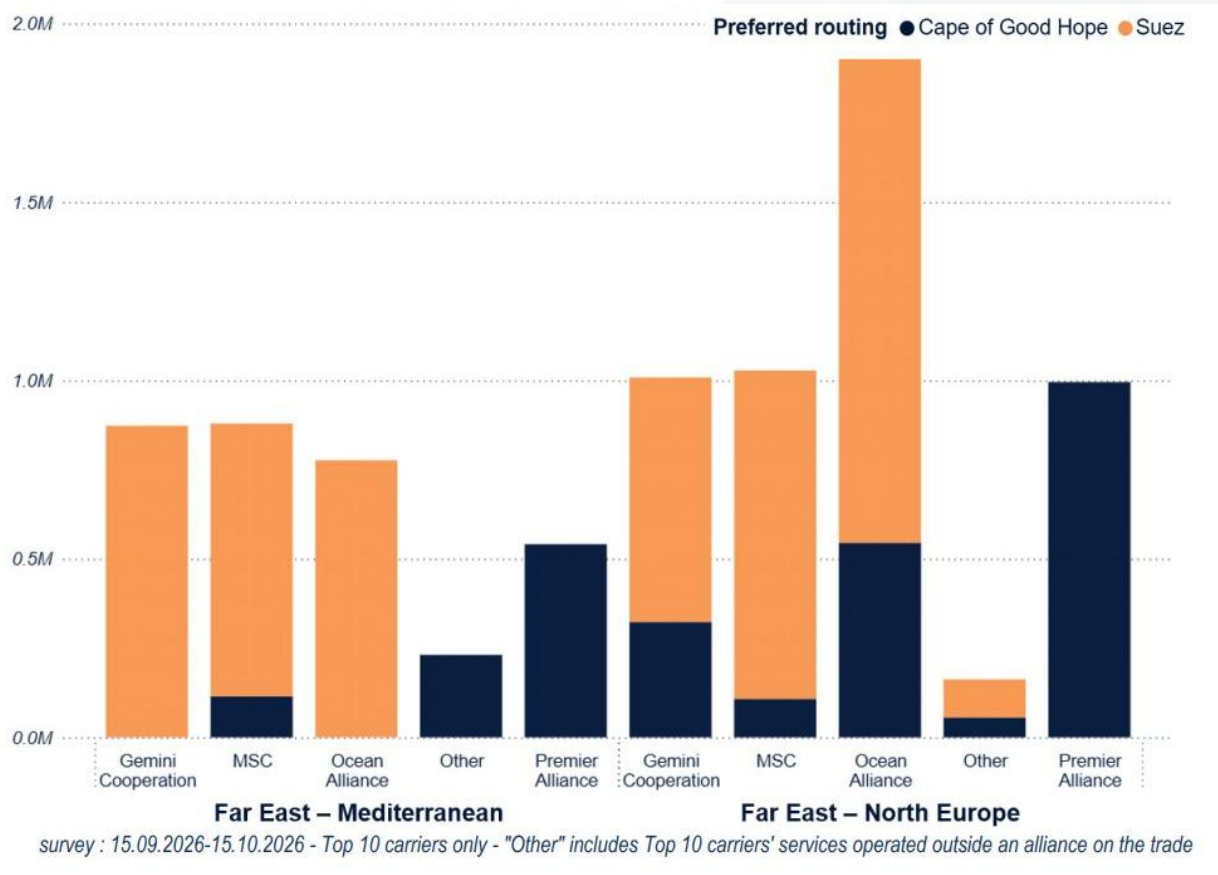


Source: [Sea Intelligence](#)

This trend suggests greater operational independence, with carriers assuming more individual network risk while offering increasingly differentiated physical routing options. Consequently, competition may progressively shift from shared network coverage towards service differentiation, connectivity and operational performance.

The gradual return of container shipping to the Red Sea/Suez corridor is gathering momentum. According to Alphaliner, **63% of deployed Far East–Europe capacity (5.50 million TEU out of 8.70 million TEU)** now operates on services incorporating Red Sea transits. Between 15 September and 15 October, vessels transited the corridor on 24 of the 46 direct services operated by the ten largest carriers. The return is particularly pronounced on Far East–Mediterranean routes (70% of deployed capacity), compared with Far East–North Europe (58%). However, network normalisation remains gradual, with several services operating mixed routings, transiting Suez westbound while returning via the Cape of Good Hope. Consequently, deployed capacity figures should not be interpreted as actual transit shares.

Figure 17 – Main carriers' capacity deployed (TEU)



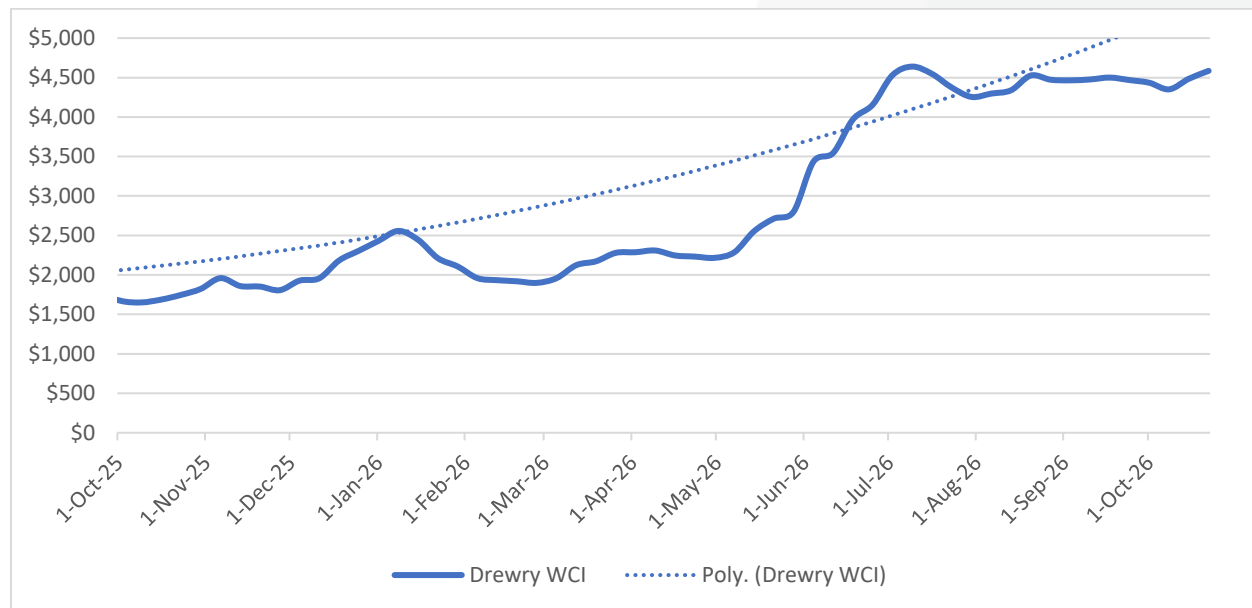
Source: Alphaliner

Global port congestion remains elevated, although conditions have improved at major Chinese gateways following Golden Week. According to Linerlytica, approximately **4.18 million TEU of containership capacity** remained at anchorage worldwide as of 17 October, with Shanghai/Ningbo recording a “queue-to-berth” ratio of **1.56**. Congestion remains particularly concentrated across Asian ports, where the convergence of vessels returning via Suez and those continuing around the Cape of Good Hope is creating uneven vessel arrivals and persistent operational bottlenecks. For the Port of Durban (all terminals), *Linerlytica* reports a “queue-to-berth” ratio of **1.23** on 17 October – up from **1.04** last week.

ii. Container freight

Drewry's *World Container Index* (WCI) increased by **↑2.2%** (or **\$100**) to **\$4,351 per 40-foot container** on 22 October, marking a second consecutive weekly increase, driven by higher rates on Asia–Europe and Transpacific routes. Shanghai–Rotterdam rates rose **↑3%** to **\$3,632**, while Shanghai–Genoa increased **↑5%** to **\$4,152**, as carriers continued managing capacity through blank sailings despite easing congestion at major Asian ports.

Figure 18 – Drewry World Container Index (\$/40ft)

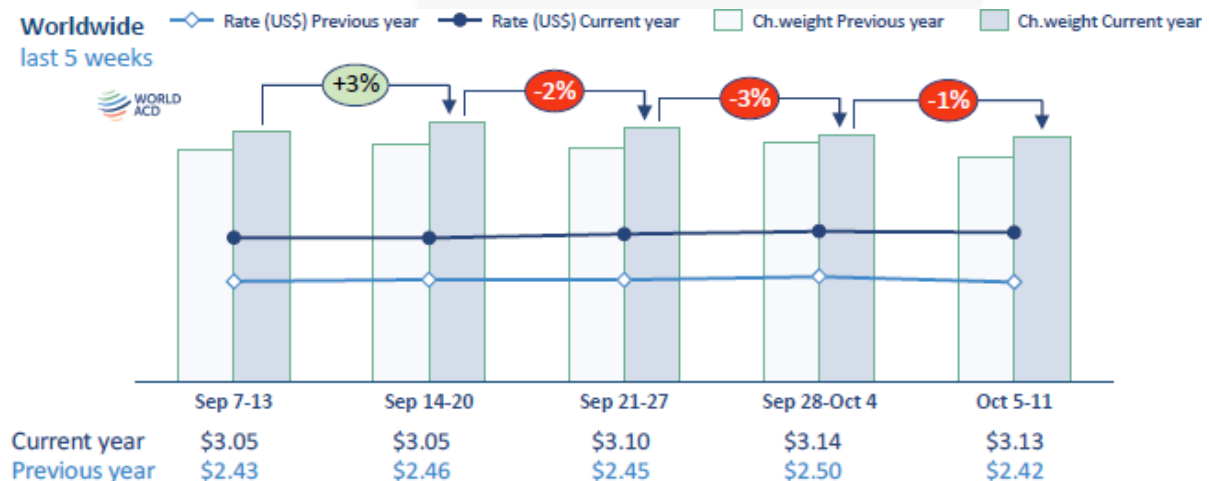


Source: Calculated from Drewry

c. Global air cargo industry

According to World ACD, global air cargo volumes declined by **↓1%** (w/w) in Week 41, marking a third consecutive weekly contraction as China's Golden Week and other Asian holidays dampened demand. Nevertheless, chargeable weight remained **↑9%** above the corresponding 2025 week. Average full-market rates remained stable at **\$3.13/kg**, while spot rates held at **\$3.55/kg**, respectively **↑29%** and **↑34%** higher year-on-year.

Figure 19 – Chargeable weight and rates (last five weeks)



Source: WorldACD

Worldwide capacity contracted by **↓1%** (w/w), with Asian holidays and renewed Middle Eastern disruptions constraining supply. Gulf-origin capacity declined by **↓4%** and remained **↓20%** below pre-conflict levels, while jet-fuel prices were **↑111%** higher year-on-year. Asia-Pacific spot rates declined by **↓3%**, whereas African-origin spot rates increased by **↑10%**, illustrating divergent regional pricing pressures.

ENDS¹³

¹³**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.

The report is not official statistics or an audited or independently assured dataset. It is not intended as a basis for investment, financial, contractual or other transactional decisions. Figures may be provisional, rounded, estimated or based on incomplete source coverage. Comparisons may be affected by changes in the data available from sources. Where a figure is a projection or estimate, or is based on a prior period, this is indicated. To the fullest extent permitted by law, SAAFF, its directors, employees and contributors: (1) give no warranty, express or implied, that the report is accurate, complete or current; and (2) accept no liability for any loss or damage of any kind arising from the use of, or reliance on, the report or any information in it. Anyone intending to rely on a particular figure should verify it directly with the original source.

Each edition reflects the information available to SAAFF at its data cut-off date. Confirmed corrections are recorded in a corrections note published with the following edition. The report is the intellectual property of SAAFF. It may be shared in full, with acknowledgement of SAAFF as the source. It may not be altered, extracted or republished in part, or used for commercial purposes, without SAAFF's prior written consent. Query email address: ivanrensburg@saff.org.za