

Cargo Movement Update #305¹

Date: 25 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)	39,015	44,449	83,464	42,484	48,401	90,885	↓8%
Air Cargo (tons)	3,596	3,061	6,657	4,602	4,162	8,764	↓24%

Monthly Snapshot

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

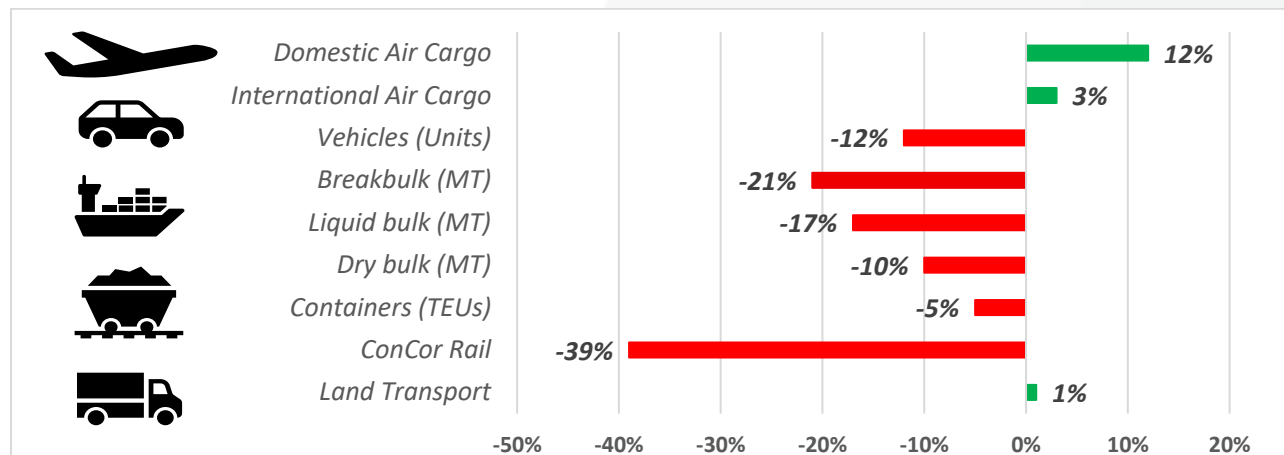
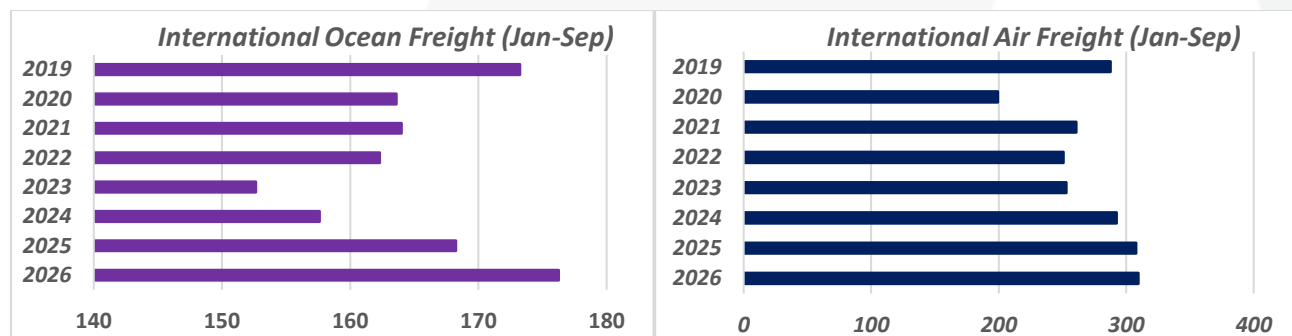


Figure 2 – Year-to-date flows 2019-2026⁵: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **11,923 TEUs** was handled per day, with **11,979 TEUs** projected for next week.
- **DGT latest: ~4,450 TEUs/day** (↑9%, w/w). Yard remains stable; anchorage **queue @13 vessels**.
- Rail cargo handled out of Durban was reported at **1,754 containers**, up by **↑38%** versus last week.
- Cross-border queue: **↑0.7 hrs**; transit: **↑1.5 hrs**; SA borders: **~8.8 hrs** (↑6%); SADC: **~9.1 hrs** (↑23%).
- Worldwide port throughput is projected to increase by **↑3.1% in 2026**, accelerating to **↑6.2% in 2027**.
- Global air cargo rebounded by **↑2%** (w/w) after the *Golden Week* lull. Ave. rates climbed by **↑4%** to **\$3.23/kg**.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 305th 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 **11,923 TEUs** was handled daily, a decrease from **12,694 TEUs** the previous week.

DGT update: Waterside volumes improved by **↑9% (w/w)**, but the vessel backlog remains severe, with **13 vessels at anchorage** and approximately **35,083 outstanding vessel moves**. Despite relatively stable yard conditions, throughput of around **3,300 moves/day** remains well below the estimated level required to clear the backlog within a month. The current 3,400-move DGT internal target is insufficient, with prolonged congestion increasingly likely without sustained productivity improvements.

Elsewhere, port operations port-wide in Durban continue to be characterised by severe congestion. Pier 1 dropped below target volumes, with waiting times of 3 to 13 days and overall Durban waiting at 12 to 13 days. Terminal recovery remains constrained by ongoing crane outages, with schedule reliability expected to be under pressure for several more weeks. In contrast, Durban's MPT was a strong performer, reporting a **↑72% increase**, exceeding target volumes. In the Western Cape, CTCT dropped below target with anchorage minimal, while the MPT showed limited activity off a very low base. In the Eastern Cape, the decline and probable normalisation continues — Port Elizabeth fell to 68% of target, confirming last week's surge was a one-off, while Ngqura eased to just below target at **94% of waterside volumes**.

Global container shipping remains characterised by weak schedule reliability, diverging vessel markets and growing capacity pressure. *Sea-Intelligence* reports a marginal improvement in September reliability to **50.6% (↑0.9 percentage points, m/m)**, although late vessels were still delayed by **6.65 days on average**.

In LNG shipping, *Drewry* anticipates a selective winter recovery, with modern XDF charter rates potentially increasing from **\$50,000/day** to **\$90,000/day** in Q4, while older TFDE rates soften. For containers, global port throughput is forecast to grow by **↑3.1%** in 2026 and **↑6.2%** in 2027, but an orderbook of **15.5 million TEU (45% of the active fleet)** raises substantial overcapacity concerns.

Meanwhile, the progressive return to Suez has released approximately **470,000 TEU from Far East–Mediterranean services**. Global congestion has eased **below 10% of fleet capacity**, while recent freight-rate stabilisation appears increasingly vulnerable to weaker seasonal demand and additional effective vessel capacity.

The latest international air cargo to and from ORTIA shows a substantial decrease in both inbound and outbound cargoes. For the week, the daily average inbound cargo amounted to **~514,000 kg (↓22%, w/w)** and outbound **~437,000 kg (↓26%)**. Despite the significant reduction in weekly numbers, the month-to-date volume for October remains up by **↑13%**, with the annual figures currently pointing to a **↑10%** growth (y/y).

Global air cargo volumes rebounded by **↑2% (w/w)** in Week 42, driven by a strong recovery in Asia-Pacific exports (**↑9%**) following Golden Week, while worldwide capacity also increased by **↑2%**. Average freight rates climbed by **↑4%** to **\$3.23/kg (↑29%, y/y)**, although regional demand remains uneven, with Asia–US volumes **↑14%** (y/y) compared with **↓16%** on Asia–Europe, reflecting stronger AI-related demand and weaker European e-commerce flows. Looking ahead, the EU's additional **€2-per-item handling fee** from 1 November could further constrain low-value e-commerce shipments, while IATA highlights continued exposure to oil-market volatility, with SAF pricing still closely linked to conventional aviation fuel.

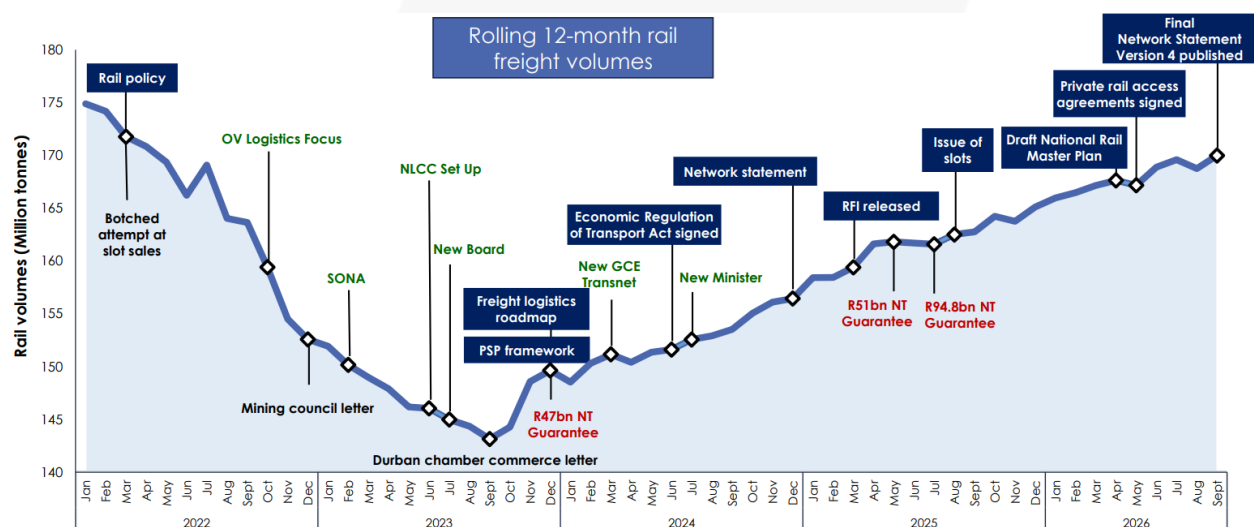
On the N4 corridor, movements increased slightly – by around **16 trucks a day**, as trains from KM4 to Maputo were stable (at an average of **1.5 trains per day**). Truck volumes through the border post increased to **1,412**

HGVs per day (↑1%, w/w). Overall, queue times **decreased slightly** to an average of **~4.4 hours (↓12%)** at the border. The average processing times were **stable** at an average of **~4.2 hours (no change)** per crossing. Weekly land border crossing figures in the SADC region show that the average queue time **increased by three-quarters of an hour this week**, as transit times **increased by an hour and a half**. The median border crossing times at South African borders **increased by half an hour**, averaging **~8.8 hrs (↑6%)** for the week. In contrast, the greater SADC region (excluding South African-controlled borders) **increased by an hour and three-quarters** – averaging **~9.1 hrs (↑23%)**. This week, on average, **three** SADC border posts took a day or more to cross, namely Kasumbalesa (taking around **six days** to cross from the **Zambian side**) and **Katima Mulilo**.

Regional road freight conditions remained challenging, particularly at Beitbridge, where ZIMRA system disruptions contributed to prolonged northbound congestion, with average crossing times increasing to **53 hours (↑51%, w/w)**. Other developments included **(1)** approximately 5 km truck queues at Kazungula and continued uncertainty surrounding Zambia's five-day transit rule; **(2)** security-related road disruptions around Kitwe following violent protests; and **(3)** temporary closure of Van Reenen's Pass following a fatal collision, with the N3 subsequently reopened. Encouragingly, Zambia announced a partnership with UNCTAD to modernise its customs management system, potentially improving regional trade facilitation over the longer term.

Despite our understandable focus on DGT's challenges and the wider container sector, compounded by persistent constraints in international liner shipping, we must not lose sight of South Africa's broader freight task. Meeting this demand requires a genuinely **synchro modal approach**, with road, rail and ports operating as complementary parts of one logistics system, and freight moving on the mode best suited to its requirements. The newly released *State of Logistics™ 2026* reinforces why the railway turnaround remains paramount. After falling to **149.5 million tonnes in 2022/23**, Transnet's freight volumes recovered to approximately **167.9 million tonnes in 2025/26**, supported by important reforms, including access agreements with eleven private train operators.

Figure 3 – Rolling 12-month rail freight volumes



Source: Gain Group

Encouraging, certainly, but recovery remains incomplete. The ultimate test is not simply higher rail volumes, but dependable general freight services, more appropriate modal allocation and lower avoidable logistics costs across the entire supply chain.

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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 19 to 25 October (measured in TEUs)

7-day flow reported (19/10/2026 – 25/10/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Gateway Terminal (Previously Pier 2)	4,450	31,149	↑9%
New Pier (Pier 1)	2,232	15,621	↑2%
Cape Town Container Terminal	1,530	10,708	↓30%
Ngqura Container Terminal	2,259	15,816	↓17%
Port Elizabeth Container Terminal	283	1,979	↓75%
Other	1,170	8,191	↑73%
Total	11,923	83,464	↓8%

Source: Calculated from TPT, 2026. Updated 25/10/2026.

An average of ~11,923 TEUs (↓8%) was handled per day for the last week (19 to 25 October, Table 2). Consequently, throughput was slightly below the projected average of ~12,694 TEUs (↓6% actual versus projected). For the coming week, an increased average of ~11,979 TEUs (↑1%) is predicted to be handled (26 October to 1 November, Table 3).

Table 3 – Container Ports – Weekly flow projected for 26 October to 1 November (measured in TEUs)

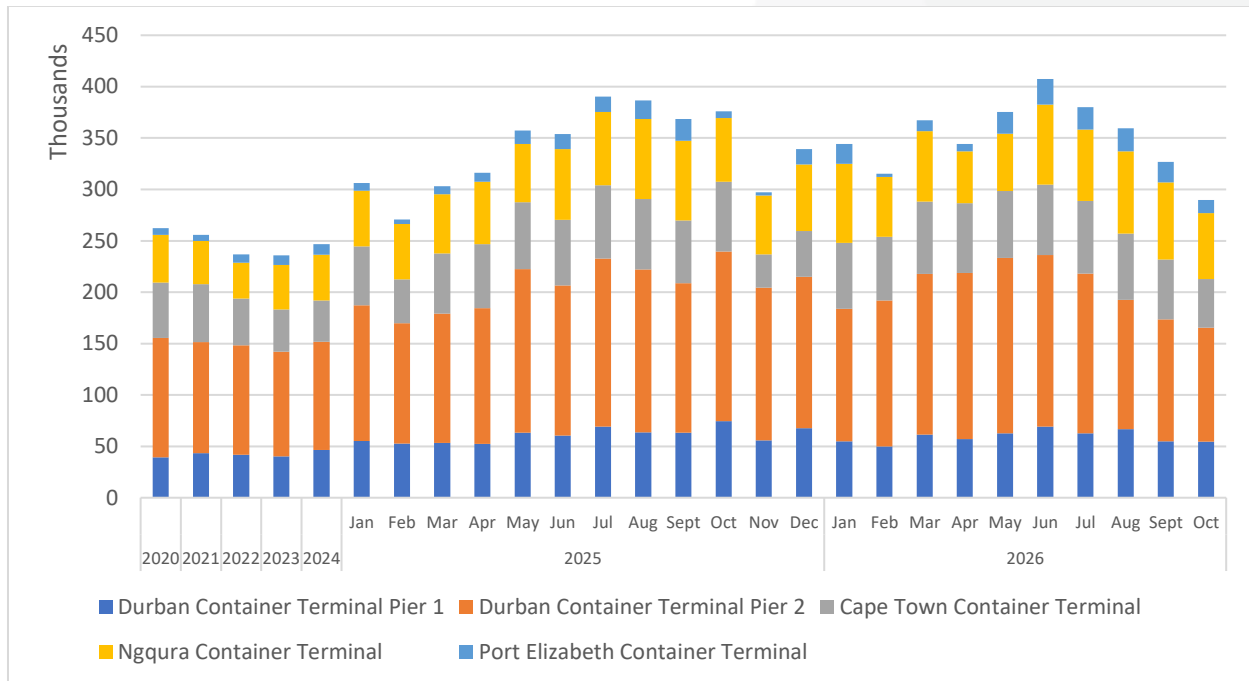
7-day flow projected (26/10/2026 – 01/11/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Gateway Terminal (Previously Pier 2) ⁶	4,421	30,947	↓1%
New Pier (Pier 1)	2,153	15,072	↓4%
Cape Town Container Terminal	2,144	15,005	↑40%
Ngqura Container Terminal	2,019	14,133	↓11%
Port Elizabeth Container Terminal	378	2,643	↑34%
Other	865	6,052	↓26%
Total	11,979	83,852	↑1%

Source: Calculated from TPT, 2026. Updated 25/10/2026.

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 4 – Monthly flow reported for total container movement (thousands, 2020 to present, m/m)



Source: Calculated from TPT, 2026, and updated 25/10/2026.

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 ⁷	0.0	1.3
Durban	DGT	7.1	3.6
Durban	Pier 1	4.3	3.5
East London	MPT ⁸	0.3	1.9
Ngqura	NCT	2.6	3.3
Port Elizabeth	PECT	1.4	1.4

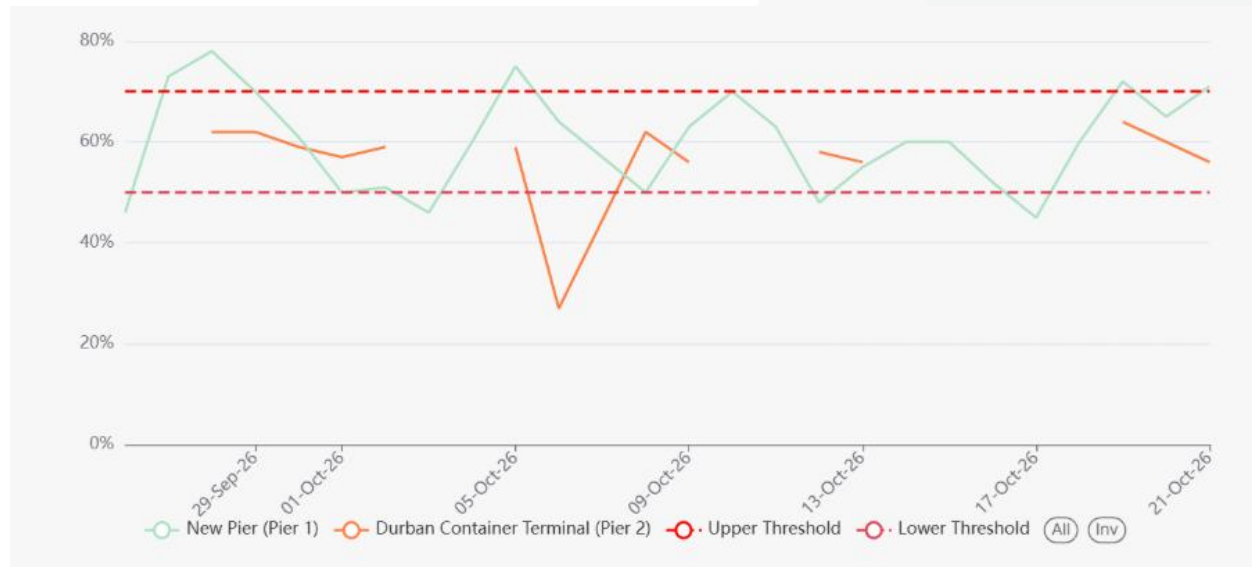
Source: Calculated from Marine Traffic AIS data, 2026. Updated 27/10/2026.

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 5 – Stack occupancy in Durban, general-purpose containers (26 September to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 25/10/2026.

The following figure shows daily stack occupancy in Cape Town over a similar period.

Figure 6 – Stack occupancy in CTCT, GP, reefer, and empty stack (28 September to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 25/10/2026.

b. Summary of port operations

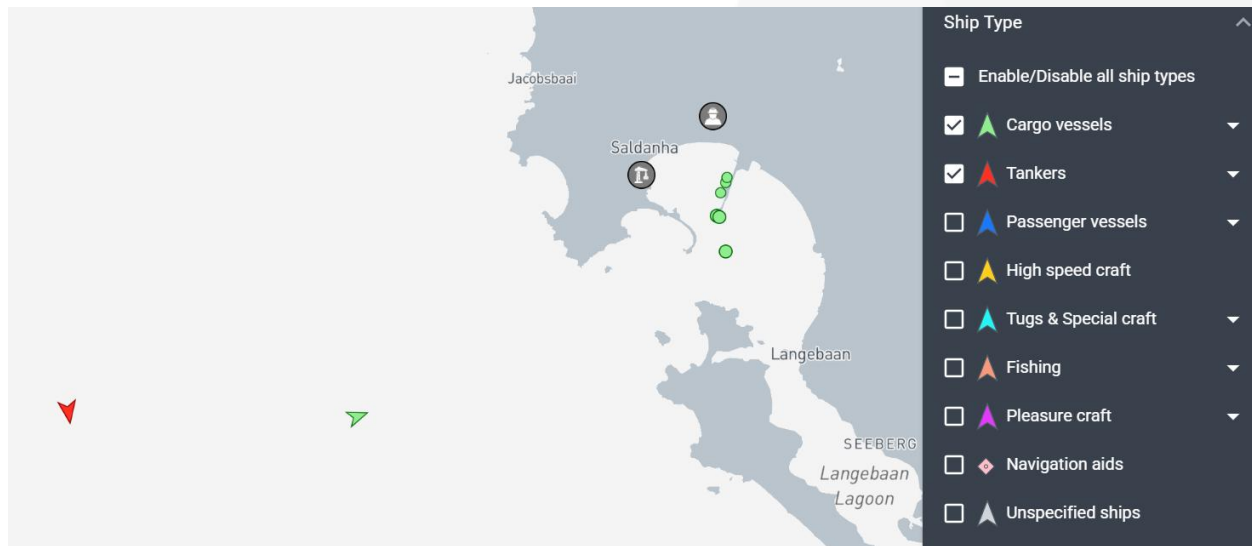
i. Cape Town

Cape Town Container Terminal recorded a decline of 30% in waterside volumes, falling to 86% of the target volume. Time at anchorage was minimal at 4 hours and time at berth was an average of 37 hours. Terminal operations were supported by eight out of nine cranes and 30 of 32 RTGs throughout the week.

Cape Town Multi-Purpose Terminal recorded significant increase in waterside volumes, up by 285%, though this was off a near-zero base, with the terminal reaching only 12% of target volumes. The terminal had one vessel call, spending 2 hours at anchorage and 40 hours at berth. The terminal operated with an average of two out of three cranes.

AGL Terminal had no vessel calls for the reporting week.

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



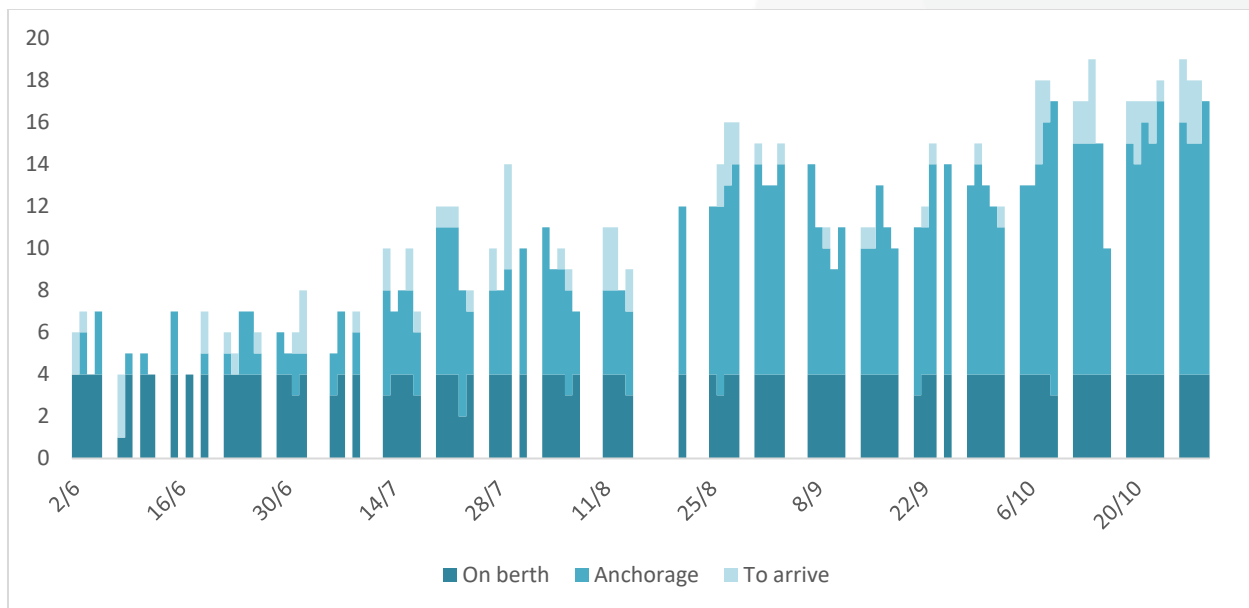
Source: Marine Traffic. Updated 25/10/2026 at 14:00.

ii. Durban

Pier 1 recorded a modest increase in waterside volumes, but by only 9%, and fell below target volumes at 88%. Time at anchorage eased slightly to 123 hours, down from 125 hours, spending an average of 61 hours at berth, with the average number of vessels waiting at anchorage down to three (from six the previous week). The terminal operated with an average of four out of seven cranes and a full complement of RTGs. The **TTT** for the week averaged **~72 minutes (↑100%, w/w)**, and the average **staging time** was **~58 minutes (↑123%)**.

Durban Gateway Terminal (DGT) recorded a **↑9% (w/w)** improvement in waterside volumes in the last week; however, this has not translated into meaningful relief of the vessel backlog. Yard conditions remain comparatively stable, although stack occupancy increased to **65%**, with 2,845 road-import containers on hand. The principal concern remains waterside performance: waiting times reached **314 hours at anchorage**, average berth time was 171 hours, and **13 vessels remained at anchorage** on 29 October. DGT's latest analysis on 28 October indicates approximately **35,083 outstanding vessel moves**, while throughput continues to hover around **3,300 moves/day**. At this rate, the terminal remains more than 1,200 daily moves short of SAAFF's estimated level required to begin sustainably reducing the backlog in about a month's time. These levels were achieved by the terminal earlier in the year, albeit in different circumstances. Consequently, the current **3,400-move target** remains insufficient. As the accompanying graph below illustrates, internal stabilisation has not translated into system-wide recovery. Without a substantial and sustained improvement in waterside productivity, we are facing a prolonged summer of congestion.

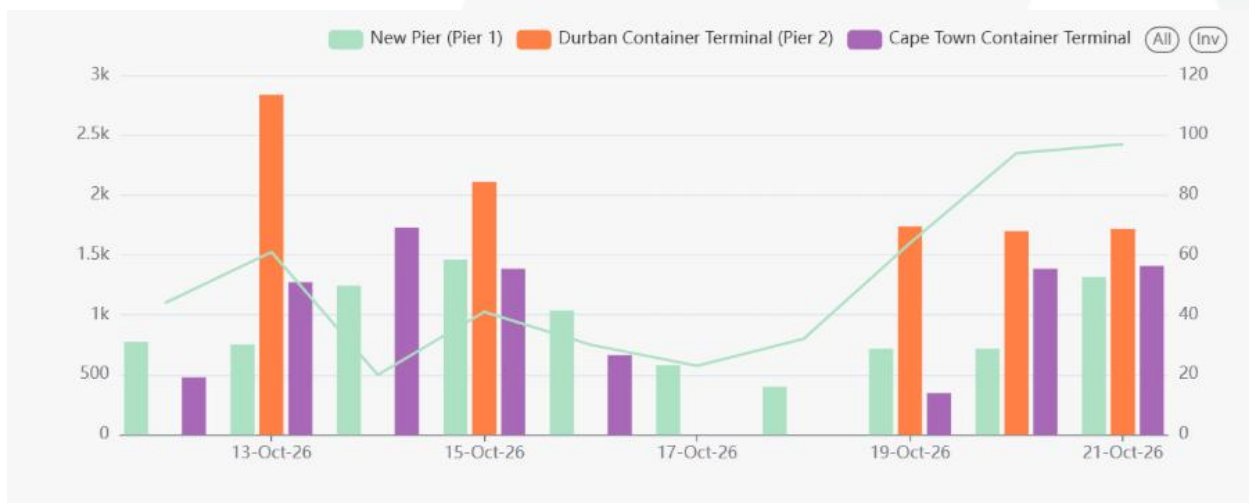
Figure 8 – DGT vessel count: on berth, at anchorage, to arrive



Source: Calculated from DGT

Durban Multi-Purpose Terminal recorded a strong increase of 72% in waterside volumes, reaching 17%. Average time at anchorage was 146 hours and berth time 108 hours, with an average of three vessels waiting at anchorage throughout the week.

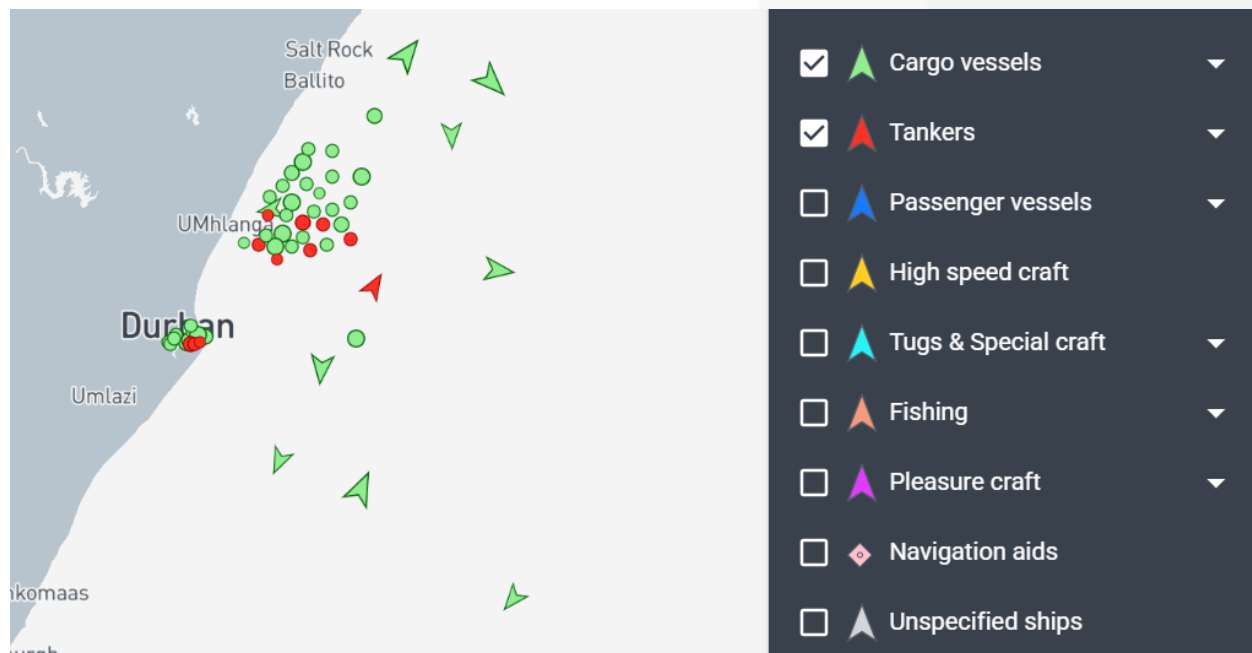
Figure 9 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 25/10/2026.

The queue of container vessels waiting outside Durban **increased** this week to **38 vessels**. On Wednesday morning (28 October), **13** (down from last week) container vessels were waiting outside at anchorage for Durban, **seven** for DGT, **four** for Point and **two** for Pier 1. The queue of dry (**twelve**) increased, liquid (**eight**) increased, and breakbulk (**two**) increased:

Figure 10 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 25/10/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal recorded a decline in waterside volumes of 17%, easing to just below target at 94%, possibly impacted by weather delays early in the week. Anchorage time averaged at around 53 hours and 63 hours at berth, with an average of 2 vessels waiting at anchorage. The terminal operated with an average of seven out of eight cranes and 23 of 30 RTGs.

Port Elizabeth Container Terminal reported a significant decline of 75%, falling to 68% of target — confirming last week's surge to 274% was a one-off. Vessels spent an average of 17 hours waiting at anchorage 35 hours at berth.

iv. Richards Bay

At RBCT, the daily average coal throughput for the week **decreased** and averaged close to **189,000 tons** (↓6%, w/w) per day. With an average of **27 trains per day** being serviced, **above** the target of 22.

v. Transnet Freight Rail (TFR)

In the last week (19 to 25 October), rail cargo on the ConCor line out of Durban was reported at **1,754** containers, up by **↑38%** from the previous week's **1,269** containers.

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



Source: Calculated using data from Transnet, 2025. Updated 25/10/2026.

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 (19 to 25 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

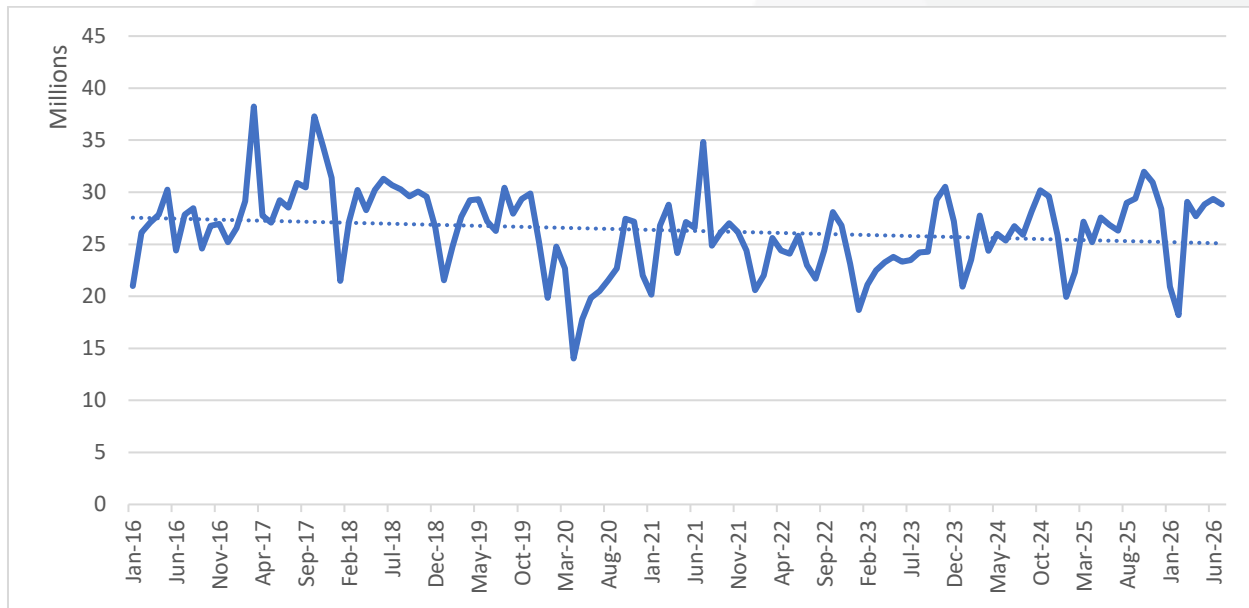
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	513,734	3,596,135	↓22%
Volume outbound	437,254	3,060,778	↓26%
Total	950,988	6,656,913	↓24%

Courtesy of ACOC. Updated: 25/10/2026.

The latest international air cargo to and from ORTIA shows a substantial decrease in both inbound and outbound cargoes. For the week, the daily average inbound cargo amounted to **~514,000 kg (↓22%, w/w)** and outbound **~437,000 kg (↓26%)**. Despite the significant reduction in weekly numbers, the month-to-date volume for October remains up by **↑13%**, with the annual figures currently pointing to a **↑10%** growth (y/y).

The following figure shows the international air cargo flows to and from ORTIA across the last 10 years – with the long-term trend slightly decreasing:

Figure 12 – International cargo to and from ORTIA (monthly, kg millions)



Calculated from ACOC. Updated: 25/10/2026.

Jet fuel stock improved in the last week and is currently stable. The latest reported fuel stock days (as of Wednesday afternoon, 28 October) per airport indicate:

- ORTIA: **6.4 days** (target: 5 days)
- CTIA: **4.5 days** (target: 4 days)
- Durban: **17.7 days** (target: 5 days)

3. Road and Regional Update

a. Lebombo border post update

In the last week (19 to 25 October), movements increased slightly – by around **16 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 increased to **1,412 HGVs per day** (↑1%, w/w).
- Overall, queue times **decreased slightly** to an average of **~4.4 hours** (↓12%) at the border.
- The average processing times were **stable** at an average of **~4.2 hours (no change)** per crossing.

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

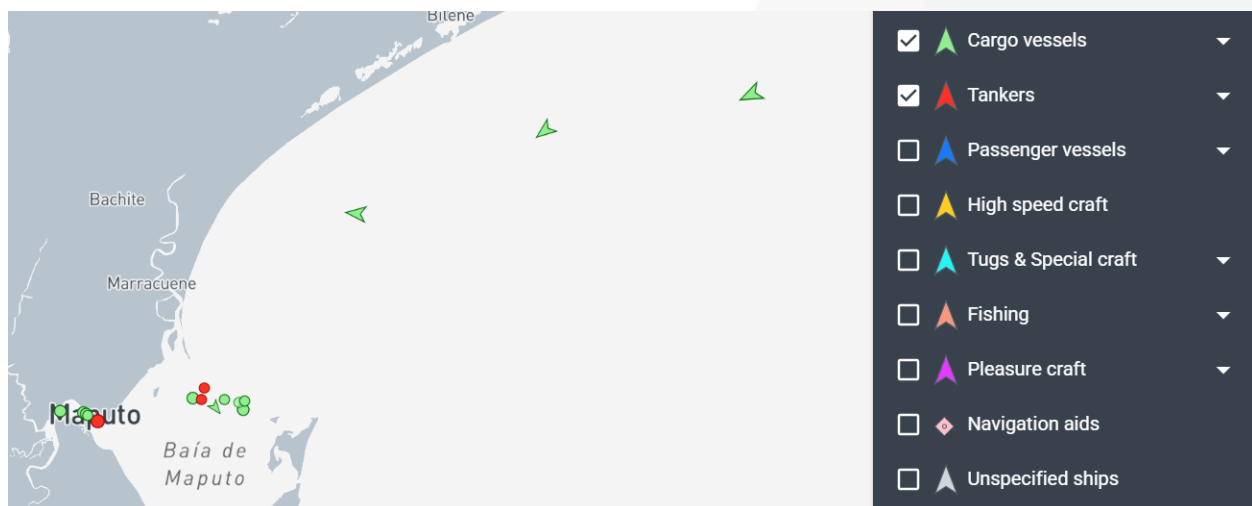
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,412	1,440	1,041	189	41	93	62	278
% (w/w)	1%	3%	-1%	3%	-6%	21%	15%	-1%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 25/10/2026.

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

Figure 13 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 25/10/2026 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 **increased by three-quarters of an hour this week**, as transit times **increased by an hour and a half**.
- The median border crossing times at South African borders **increased by half an hour**, averaging **~8.8 hrs (↑6%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) **increased by an hour and three-quarters** – averaging **~9.1 hrs (↑23%)**.

1. Zimbabwe – ZIMRA System Disruptions and Beitbridge Congestion:

- ZIMRA's online payment system was reportedly restored late on 20 October, allowing traders to resume electronic customs payments. However, significant northbound congestion persisted, with truck queues extending into Musina.
- Authorities introduced a sticker-based system to distinguish pre-cleared vehicles from those with incomplete documentation, while requests to relax certain vehicle pre-clearance requirements received limited response.
- According to Crickmay's latest Corridor Pulse data, average Beitbridge crossing times increased by ↑51% to 53 hours, the highest recorded in its monitoring history.

2. Zambia/Botswana – Kazungula Border Congestion and Transit Regulations:

- Northbound truck queues at Kazungula reportedly extended approximately 5 km on 21 October, reflecting persistent congestion along this important regional corridor.
- Zambia's five-day customs transit window continues to create challenges, particularly where delayed departures expose transporters and clearing agents to penalties.
- Recent industry feedback indicates that the five-day period will commence upon release of the vehicle, rather than upon entry into the customs yard. Formal implementation remains to be confirmed.

3. Zambia – Kitwe/Kalulushi Road Security Disruptions:

- Violent confrontations between police and local residents on 19 October resulted in fatalities, road blockages and stone-throwing incidents affecting traffic around Kitwe.

- b. Transporters were advised to exercise extreme caution or avoid the Kitwe–Kalulushi road until conditions stabilised, highlighting the vulnerability of regional freight movements to civil unrest.

4. South Africa – N3 / Van Reenen's Pass Disruption:

- a. A fatal collision involving two trucks and a light delivery vehicle on 27 October resulted in the temporary closure of Van Reenen's Pass, disrupting freight movements along the critical Durban–Gauteng corridor.
- b. The route reopened at 17:40 on 27 October, although motorists were warned of continuing congestion while the accumulated traffic backlog cleared.

5. Zambia – Customs Modernisation and Trade Facilitation:

- a. On 21 October, the Zambia Revenue Authority (ZRA) announced a partnership with UNCTAD to implement ASY5, replacing the existing ASYCUDA World customs management system.
- b. The initiative aims to strengthen customs digitalisation, automation and compliance management. Although a positive longer-term development, implementation and effective coordination across border agencies will determine its trade-facilitation benefits.

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

Table 7 – Delays⁹ summary – South African borders¹⁰ (both directions)

Border Post	Direction	HGV ¹¹ 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	438	23.7	5.1	23.4	13,140	3,066
Beitbridge	Zimbabwe-SA	511	5.0	1.5	4.6	15,330	3,577
Groblersbrug	SA-Botswana	239	11.8	1.4	11.5	7,170	1,673
Martin's Drift	Botswana-SA	192	1.8	0.3	1.5	5,760	1,344
Kopfontein	SA-Botswana	252	5.6	1.5	5.4	7,560	1,764
Tlokweng	Botswana-SA	40	0.7	0.2	0.4	1,200	280
Vioolsdrift	SA-Namibia	30	4.6	2.1	4.4	900	210
Noordoewer	Namibia-SA	20	2.0	0.5	1.6	600	140
Nakop	SA-Namibia	30	4.2	1.1	4.1	900	210
Ariamsvlei	Namibia-SA	20	1.1	0.4	1.1	600	140
Skilpadshek	SA-Botswana	271	12.3	2.5	12.2	8,130	1,897
Pioneer Gate	Botswana-SA	77	2.2	1.3	2.1	2,310	539
Ramatlabama	SA-Botswana	232	5.5	2.1	5.3	6,960	1,624
Ramatlabama	Botswana-SA	101	0.5	0.2	0.3	3,030	707
Lebombo	SA-Mozambique	1,375	4.4	2.0	4.2	41,250	9,625
Ressano Garcia	Mozambique-SA	1,367	1.9	0.3	1.5	41,010	9,569
Sum/Average		5,195	5.5	1.4	5.2	155,850	36,365

Source: Calculated from [TransAfricaBorder](#) & Crickmay, week ending 18/10/2026.

⁹ 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.

¹⁰ Note: From this week onwards, bi-directional flows through the Ramatlabama border post between South Africa and Botswana has been added.

¹¹ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

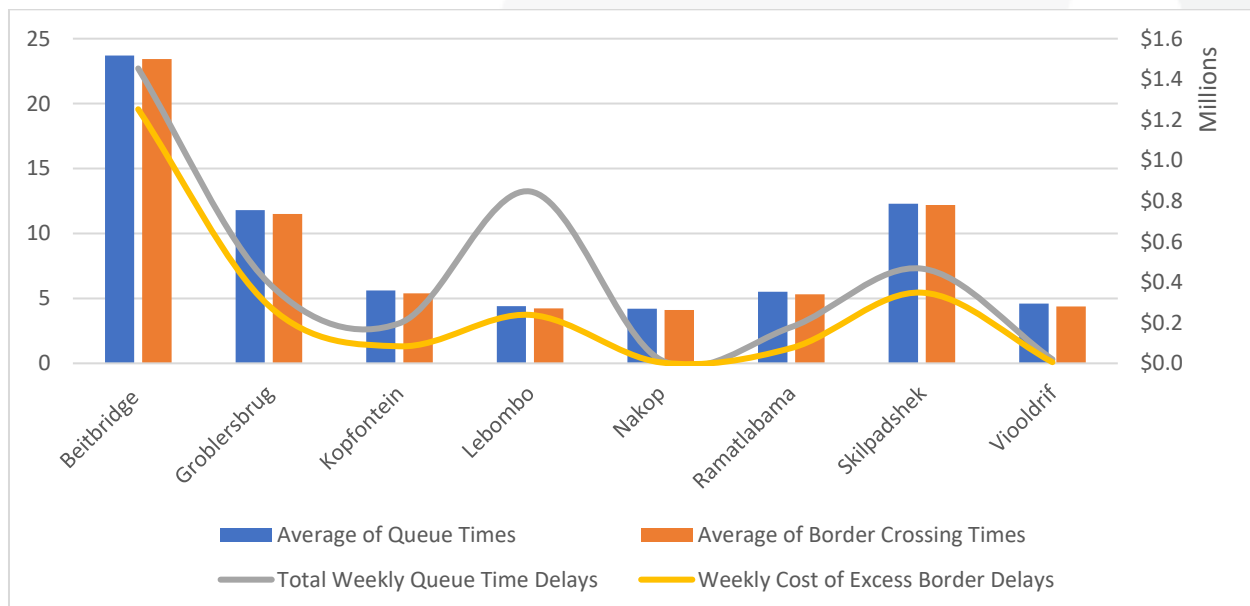
Table 8 – Delays summary – Corridor perspective

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	7.6	2.0	7.3	9,600	2,240
Central Corridor	798	1.8	0.2	2.4	23,940	5,586
Dar Es Salaam Corridor	1,819	27.4	7.2	29.6	54,570	12,733
Maputo Corridor	2,742	3.2	1.2	2.9	82,260	19,194
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,505	16.7	4.1	19.8	105,150	24,535
Northern Corridor	2,817	1.4	0.3	1.3	92,520	21,588
WBNDL Corridor	1,003	3.9	1.1	3.8	30,090	7,021
Trans Cunene Corridor	100	3.0	1.0	2.8	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	18.2	2.5	18.1	3,480	812
Sum/Average	13,447	8.1	2.0	9.1	411,420	95,998

Source: Calculated from TransAfricaBorder & Crickmay, week ending 18/10/2026.

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

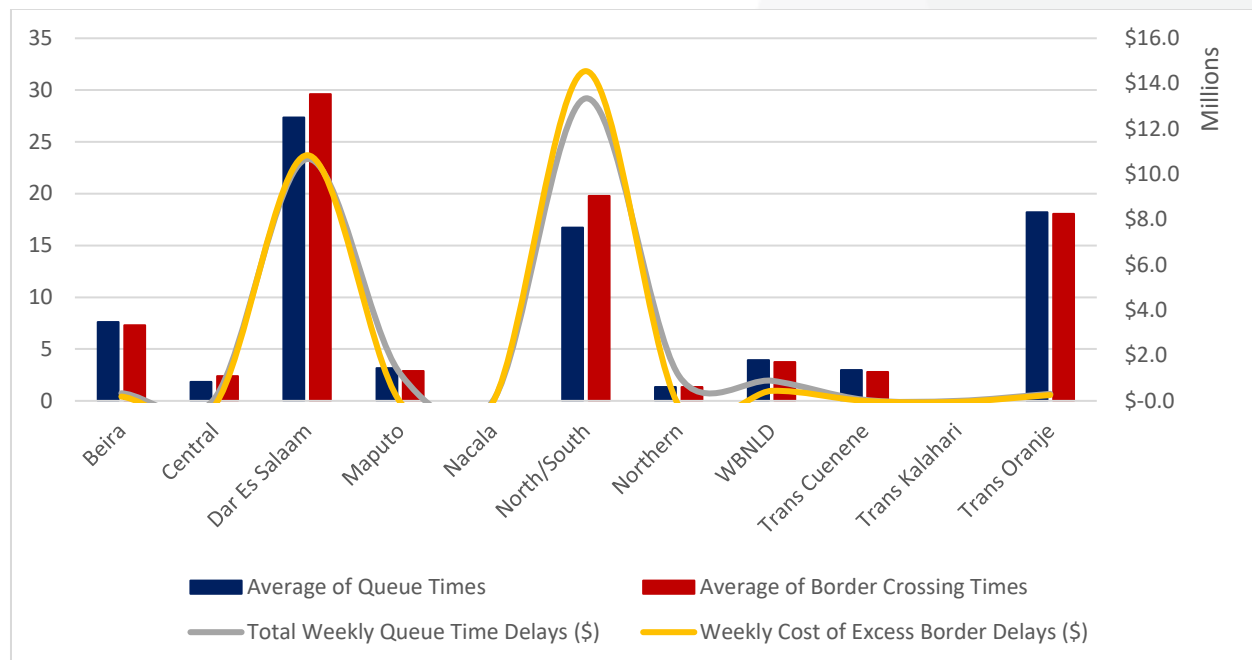
Figure 14 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 18/10/2026.

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

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



Source: Calculated from TransAfricaBorder & Crickmay, week ending 18/10/2026.

In summary, cross-border queue time averaged **~8.1 hours** (up by **~0.7 hours** from the previous week's **~7.4 hours**), indirectly costing the transport industry an estimated **\$28 million (R466 million)**. Furthermore, the week's average cross-border transit times also hovered around **~9.1 hours** (up by **~1.5 hours** from the previous week's **~7.5 hours**), at an indirect cost to the transport industry of **\$25.7 million (R427 million)**. The total indirect cost for the week amounts to an estimated **~\$53.7 million (R893 million)**, up by **↑21%** from the **~R736 million** in the previous report).

4. International Update

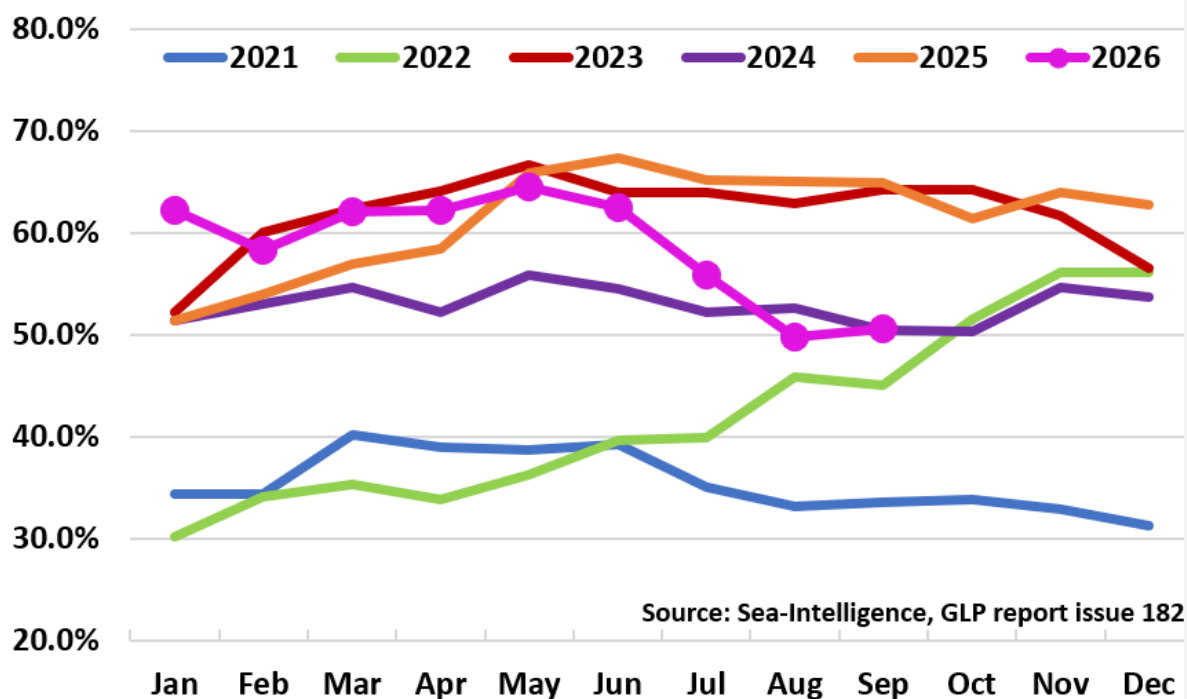
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Global schedule reliability

Global container shipping schedule reliability improved marginally in September, increasing by **↑0.9 percentage points** (m/m) to **50.6%**, according to *Sea-Intelligence*. The improvement follows three consecutive monthly declines, which collectively reduced reliability by **↓14.8 percentage points** from May's peak of **64.5%**. Average delays for late vessel arrivals eased slightly to **6.65 days** (**↓0.3 days**, m/m), although these remain exceptionally elevated. Maersk was the most reliable major carrier (64.8%), followed by Hapag-Lloyd (60.4%), while Wan Hai recorded the lowest reliability (26.7%). At alliance level, MSC (68.9%) narrowly outperformed Gemini (68.4%), with Ocean Alliance (44.8%) and Premier Alliance (41.5%) trailing significantly (alliance-level comparison covers August–September, rather than September alone). Overall, the marginal improvement offers little evidence of sustained schedule normalisation, with reliability remaining materially below earlier levels.

Figure 16 – Global Schedule Reliability

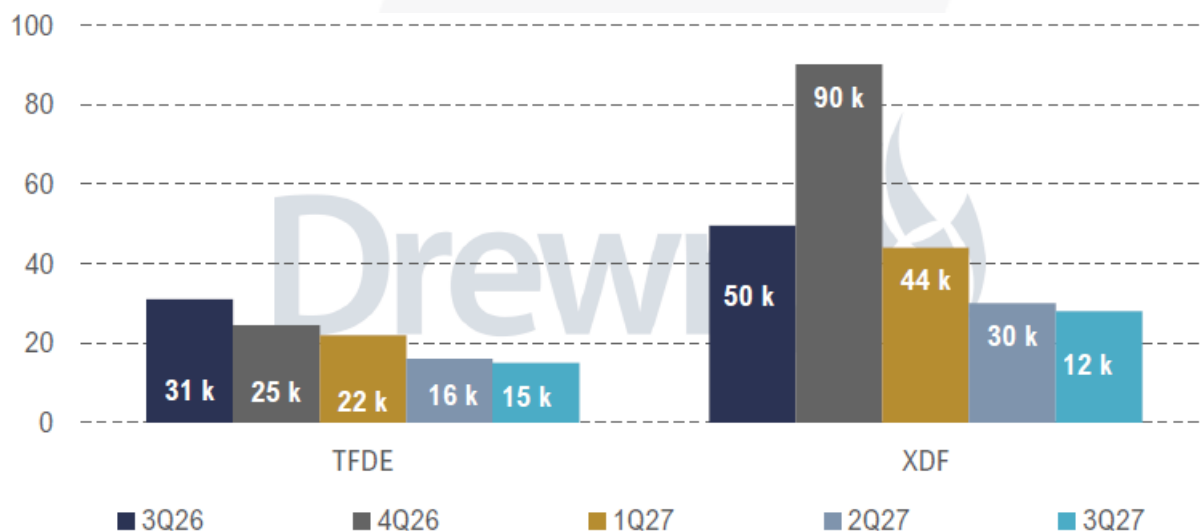


Source: Sea-Intelligence

ii. Global liquefied and natural gas shipping market

The global LNG shipping market is entering the northern winter with diverging freight-rate trends and continued uncertainty around effective vessel availability. According to *Drewry*, modern XDF carrier spot rates are forecast to increase from approximately **\$50,000/day in Q3 to \$90,000/day in Q4**, while older TFDE rates are expected to ease from \$31,000 to \$25,000/day:

Figure 17 – Drewry LNG shipping rate quarterly forecast ('000 \$/day)



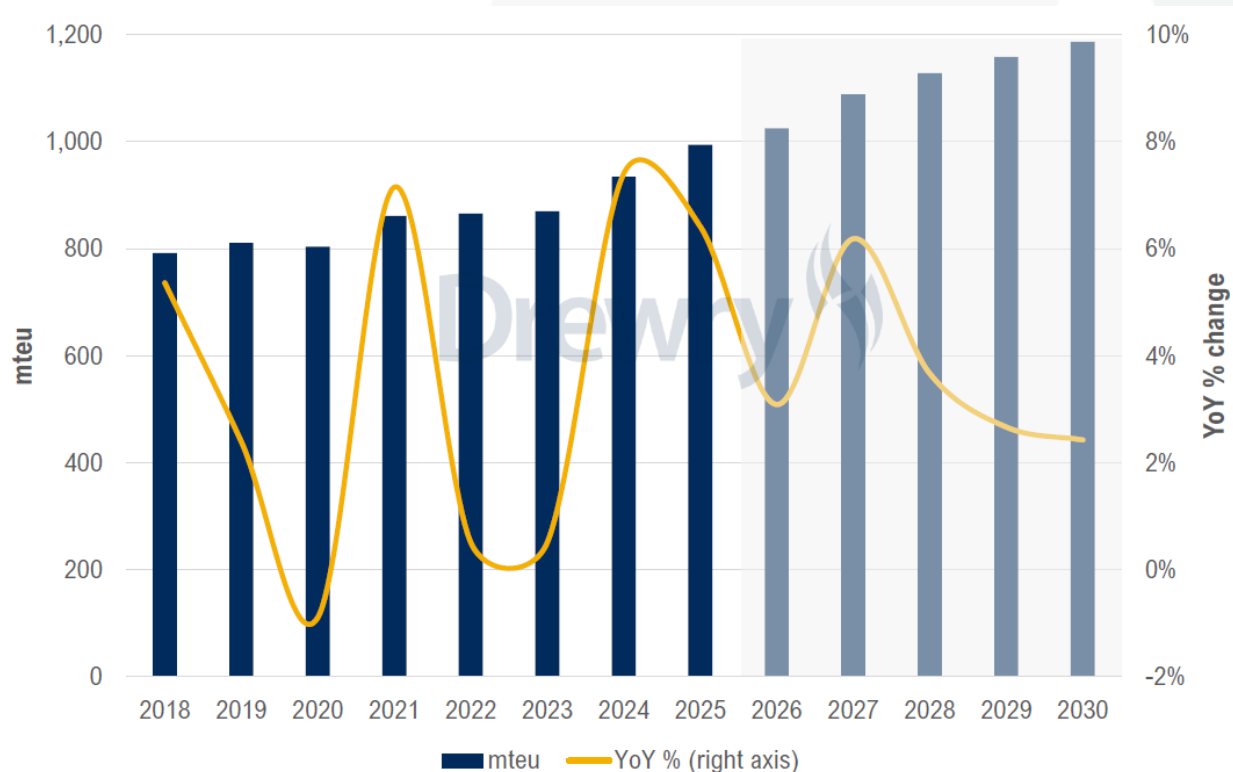
Source: Drewry

Despite geopolitical disruptions, the broader market remains constrained by ample vessel supply and uneven demand. However, fleet availability is not necessarily reflected by headline capacity growth: approximately 22% of scheduled vessel deliveries are expected to slip in 2026, while much of the new tonnage is already committed to specific projects or long-term charters. Consequently, winter recovery is expected to remain selective rather than broad-based.

iii. Container shipping – demand growth versus structural overcapacity

Drewry's latest Container Forecaster points to continued growth in global container volumes, but increasingly challenging supply-side fundamentals. Worldwide port throughput, including loaded containers, empties and transshipment, is projected to increase by **↑3.1% in 2026**, accelerating to **↑6.2% in 2027**, partly reflecting an expected recovery in Middle Eastern trade. However, the fully cellular fleet is forecast to expand by **↑5.0%** in 2026, while the orderbook has reached approximately **15.5 million TEU (45% of the active fleet)**. More importantly, newbuilding deliveries and the return to shorter Suez routings are expected to release substantial effective capacity in 2027. *Drewry* estimates that 2027 newbuilding deliveries will contribute **approximately 2.3 million TEU**, with another **1.6 million TEU released from reduced Red Sea diversions**. This explains why substantial throughput growth does not necessarily prevent overcapacity. Consequently, *Drewry* anticipates a deterioration in the global supply-demand balance, with overcapacity placing increasing downward pressure on freight rates into 2027–2028.

Figure 18 – World port throughput 2018-30F



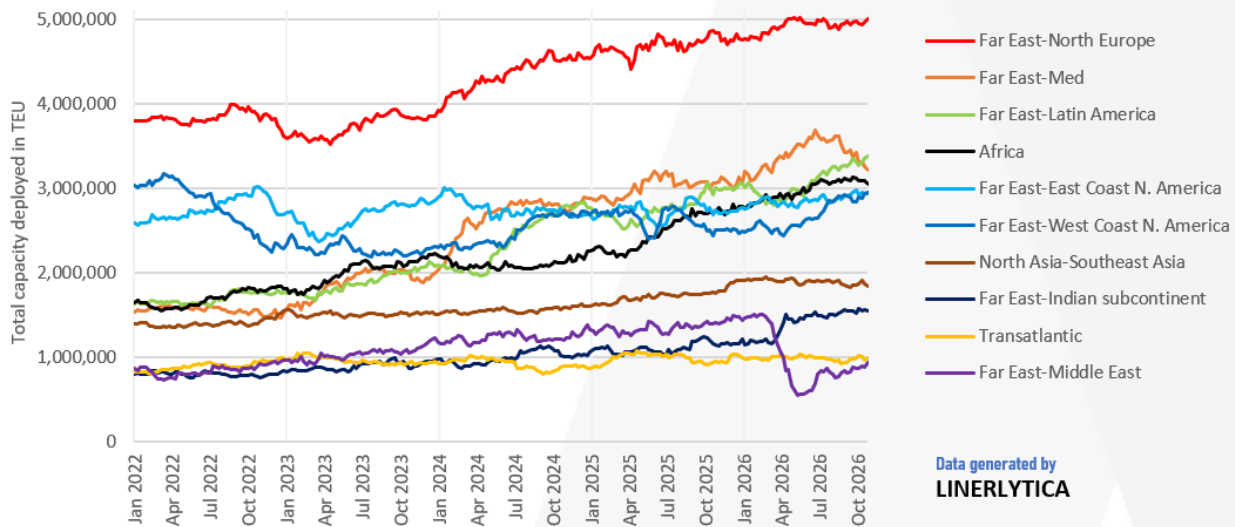
Source: [Drewry](https://www.drewry.com/)

iv. Carrier deployment, port congestion and container freight rates

Global container shipping markets are showing tentative freight-rate stabilisation, although underlying fundamentals increasingly point towards renewed downward pressure. According to *Linerlytica*, the return

to Suez has released approximately **470,000 TEU** of deployed capacity from Far East–Mediterranean services since July, with 40 vessels already redeployed, primarily to Transpacific and Latin American trades.

Figure 19 – Capacity Deployment by trade (2022-2026)



Source: [Linerlytica](https://linerlytica.com)

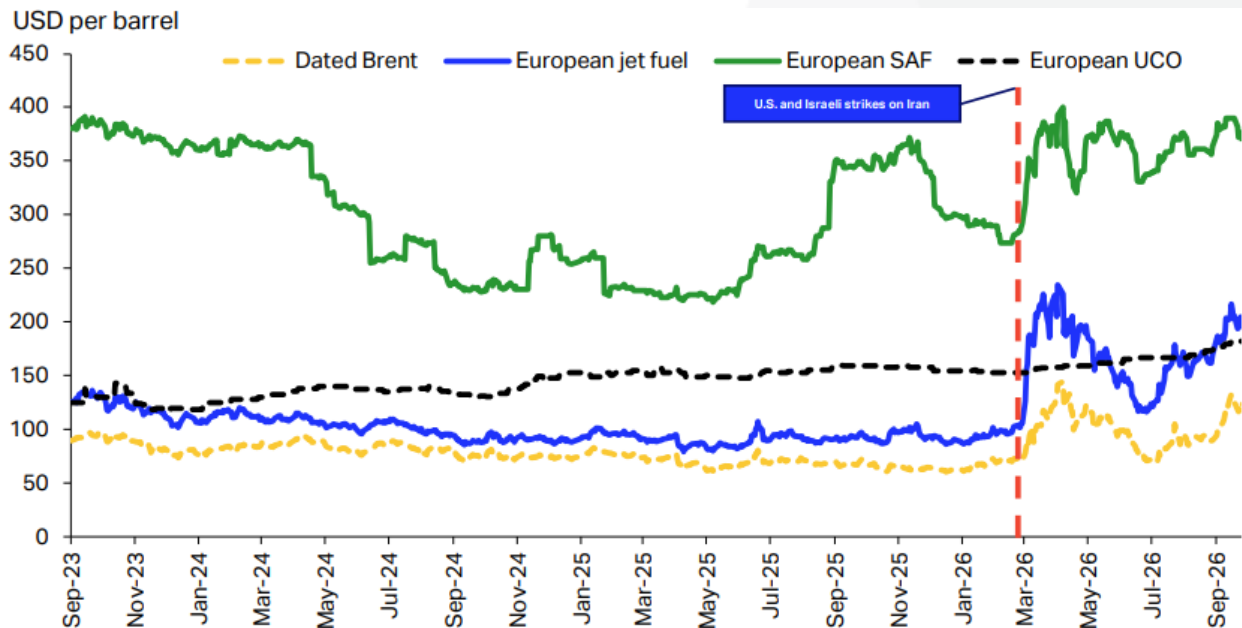
Global port congestion has eased to below **10% of fleet capacity**, down from a recent peak of 13%, although Asian bottlenecks persist following further weather disruptions and vessel bunching. For the Port of Durban (all terminals), *Linerlytica* reports a “queue-to-berth” ratio of **1.25** on 25 October – stable from **1.23** last week. Meanwhile, recent freight-rate stability appears increasingly fragile: weaker seasonal demand, additional effective capacity and unsuccessful November rate-increase attempts suggest that the market may have reached its peak, with further corrections increasingly likely.

b. Global air cargo industry

Changes to European Union customs regulations continue to reshape international e-commerce and associated air cargo flows. From 1 November, the EU will introduce an additional **€2 handling fee per distinct item** imported through e-commerce channels, following the introduction of a €3 customs duty on low-value imports in July. These changes are already coinciding with a significant contraction in Asia–Europe air cargo movements, particularly from Hong Kong (**↓32%**, y/y). By contrast, Asia–North America volumes remain comparatively resilient, supported by high-value technology and AI-related shipments. The developments highlight how regulatory changes are increasingly influencing cargo routing, demand patterns and the competitiveness of international air freight services.

IATA's latest *Chart of the Week* highlights an important structural weakness in aviation fuel markets: sustainable aviation fuel (SAF) pricing remains closely linked to conventional jet fuel rather than its underlying feedstock costs. During the recent Middle Eastern energy disruptions, SAF prices increased alongside conventional aviation fuel, despite its production inputs not experiencing equivalent price pressures. IATA argues that more independent price discovery, greater market liquidity and increased production are required before SAF can provide meaningful diversification from oil-market volatility. With **SAF representing less than 1% of global aviation fuel consumption**, exposure to conventional fuel markets and associated freight cost pressures remains substantial.

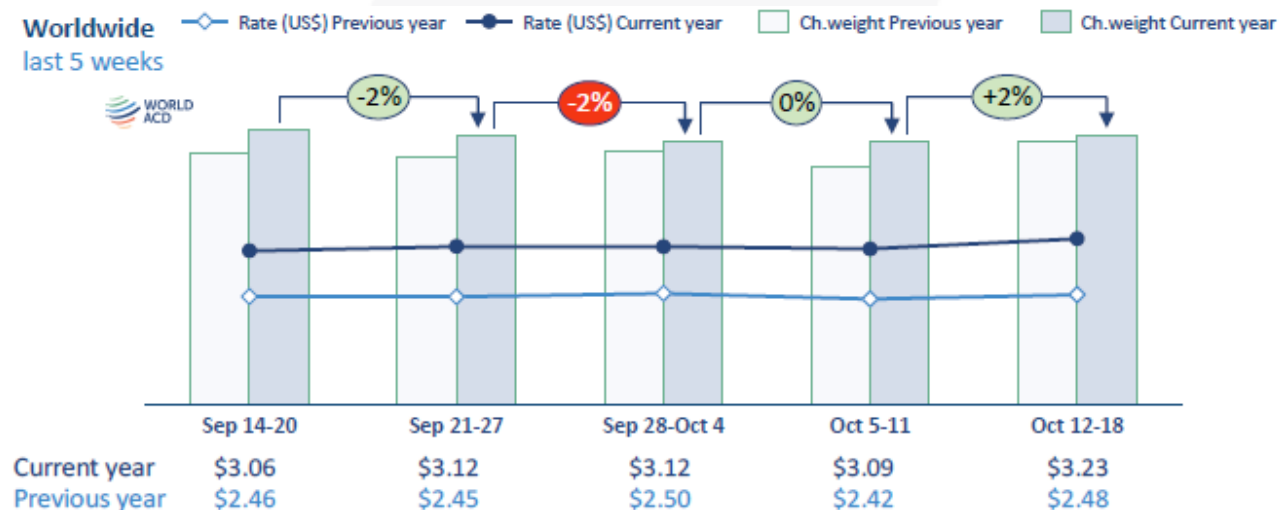
Figure 20 – Jet fuel, crude oil, SAF, and UCO prices, USD per barrel



Source: IATA

According to the latest figures from World ACD, global air cargo recovered in Week 42, with worldwide chargeable weight increasing by **↑2%** (w/w) following the Golden Week lull. The rebound was driven entirely by Asia Pacific (**↑9%**), with shipments to Europe and the US rising by **↑13%** and **↑10%**, respectively, while all other origin regions contracted. Global capacity recovered by **↑2%**, supported by a **↑6%** increase from Asia Pacific. Average full-market rates climbed by approximately **↑4%** to **\$3.23/kg**, remaining **↑29%** higher year-on-year. Notably, Asia-Pacific–US tonnages were **↑14%** (y/y), supported by AI-related demand, whereas Asia-Pacific–Europe volumes remained **↓16%** lower, particularly from Hong Kong (**↓32%**). Middle East and South Asia rates remained **↑61%** higher (y/y), highlighting persistent pricing pressures and increasingly divergent regional market conditions.

Figure 21 – Chargeable weight and rates (last five weeks)



Source: WorldACD

ENDS¹²

¹²**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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