Authored by:
www.saaff.org.za

Distributed by:
www.busa.org.za

Cargo Movement Update #306[1]

Date: 1 November 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)	46,942	53,481	**100,423**	39,015	44,449	**83,464**	↑20%
Air Cargo (tons)	4,635	2,245	**6,879**	3,596	3,061	**6,657**	↑3%

Monthly Snapshot

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

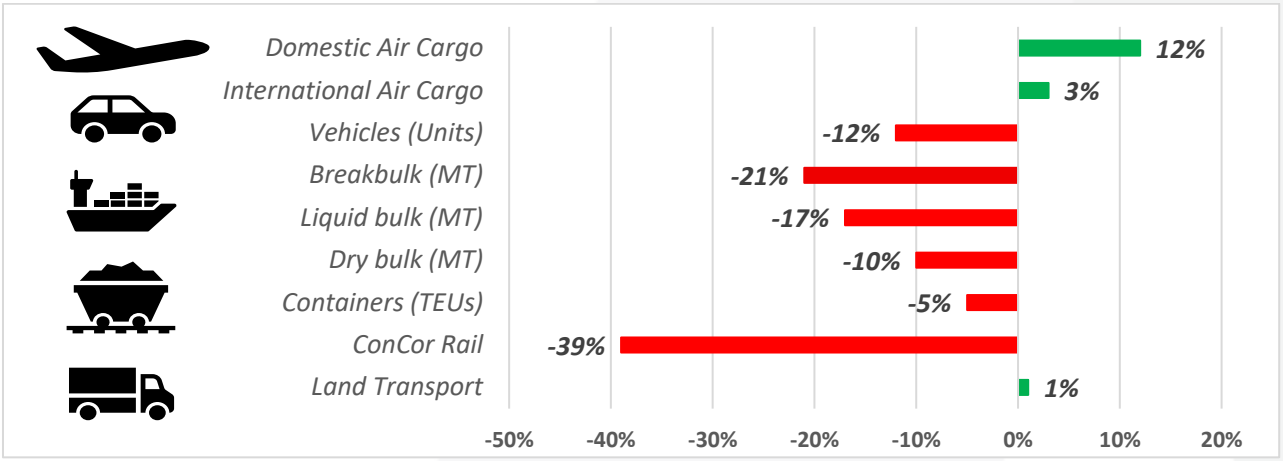
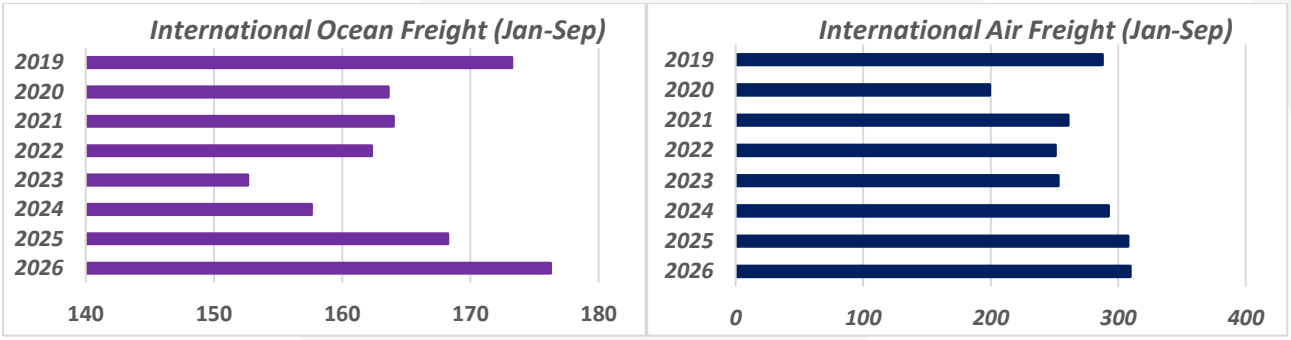


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **14,346 TEUs** was handled per day, with **11,979 TEUs** projected for next week.
- **DGT latest**: **~4,997 TEUs/day** (**↑12%**, w/w). **Stacks** have risen to **70%**; anchorage **queue @13 vessels**.
- Rail cargo handled out of Durban was reported at **2,463** containers, up by **↑40%** versus last week.
- Cross-border queue: **↑0.5 hrs**; transit: **↓0.6 hrs**; SA borders: **~11.6 hrs** (**↑31%**); SADC: **~8.1 hrs** (**↓11%**).
- Unprecedented Oct–Nov deployed capacity, **> 350k TEU/week** on **Asia–NE** & **260k/week** on **Asia–Med**.
- IATA reporting **↑7.7%** (y/y) growth in INTL CTKs in September against capacity growth of just **↑2.7%**.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *306th* 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 **14,346 TEUs** was handled daily, an increase from **11,923 TEUs** the previous week.

DGT recorded a **↑12% improvement in weekly waterside throughput to 34,976 TEUs**, while average anchorage time eased from **314 to 266 hours**. However, the vessel backlog remains severe, with the queue reaching **15 vessels on 3 November and 13 on 5 November**, while current conditions are still adding **~20 days to affected supply chains**. Yard conditions remain comparatively stable, but the persistent offshore queue confirms that **operational stabilisation has not yet translated into systemic recovery**.

Elsewhere, port operations showed some encouraging signs in Durban, as waterside volumes increased for both Pier 1 and DGT, while Durban MPT's minor decline made little impact on the strong performance, with the terminal moving 160% of its target volume, while time at anchorage shows a minor decline across Durban. However, with the extensive queue of vessels waiting, much still needs to be done to clear out the backlog. In the Western Cape, CTCT reported a strong recovery, increasing volumes by 76%, while reporting minimal vessel delays, with Cape Town MPT showing a similar trend. In the Eastern Cape, both NCT and PECT reported a significant improvement in total volumes, with both terminals moving significantly more cargo than their target for the period, while vessel turnaround times remained stable.

Global container shipping continues to face increasing supply-side pressures despite persistent congestion and schedule disruptions. *Sea-Intelligence* reports unprecedented October–November deployed capacity, exceeding **350,000 TEU/week on Asia–North Europe** and **260,000 TEU/week on Asia–Mediterranean**, partly reflecting vessel bunching rather than stronger demand.

In the meantime, *Linerlytica* reports renewed congestion across Middle Eastern and European ports, with Durban's *queue-to-berth ratio* increasing to **1.40**. Structural overcapacity concerns are intensifying, with **~6.4 million TEU** ordered during 2026, pushing the containership orderbook to **16.6 million TEU (47.8% of the fleet)**. The progressive return to shorter Suez routings could release further effective capacity.

Against this backdrop, *Drewry's WCI* declined by **↓3.4%** (w/w) to **$4,429/FEU**, while the Harpex charter index increased by **↑2.4%** to **2,585 points**. The *SCFI* remained broadly stable. Elsewhere, renewed maritime security incidents in the Strait of Hormuz intensified tanker and energy-market pressures, while dry-bulk markets showed mixed performance. European port disruptions and ongoing US–China maritime policy uncertainty added further complexity to an already volatile international shipping environment.

The latest international air cargo to and from ORTIA shows a slight increase in overall cargo – led by a significant increase in inbound cargo, as outbound cargo decreased by roughly the same magnitude. For the week, the daily average inbound cargo amounted to **~662,000 kg** (**↑29%**, w/w) and outbound **~320,600 kg** (**↓27%**). For October as a whole, cargo is up by **↑1%** versus September (m/m), and **↑6%** annually (y/y).

Global air cargo demand continued strengthening, with IATA reporting **↑7.7% (y/y)** growth in September, while international demand increased by **↑8.6%** against capacity growth of just **↑2.7%**. Asia–North America traffic expanded by **↑17%**, supported by AI-related shipments, although jet-fuel prices remained **↑103.4%** higher year-on-year, significantly outpacing cargo yield growth. Meanwhile, *World ACD* reports that global volumes declined by **↓2%** (w/w) in Week 43, with capacity contracting by **↓1%**. Despite softer volumes, spot rates increased by **↑5% to US$3.80/kg (↑38%, y/y)**, while full-market rates reached **$3.33/kg** (**↑31%**, y/y). Regional disparities persist, with Asia–US volumes **↑9%** (y/y) compared with **↓16%** on Asia–Europe, while Arabian Gulf capacity constraints continue sustaining pricing pressures.

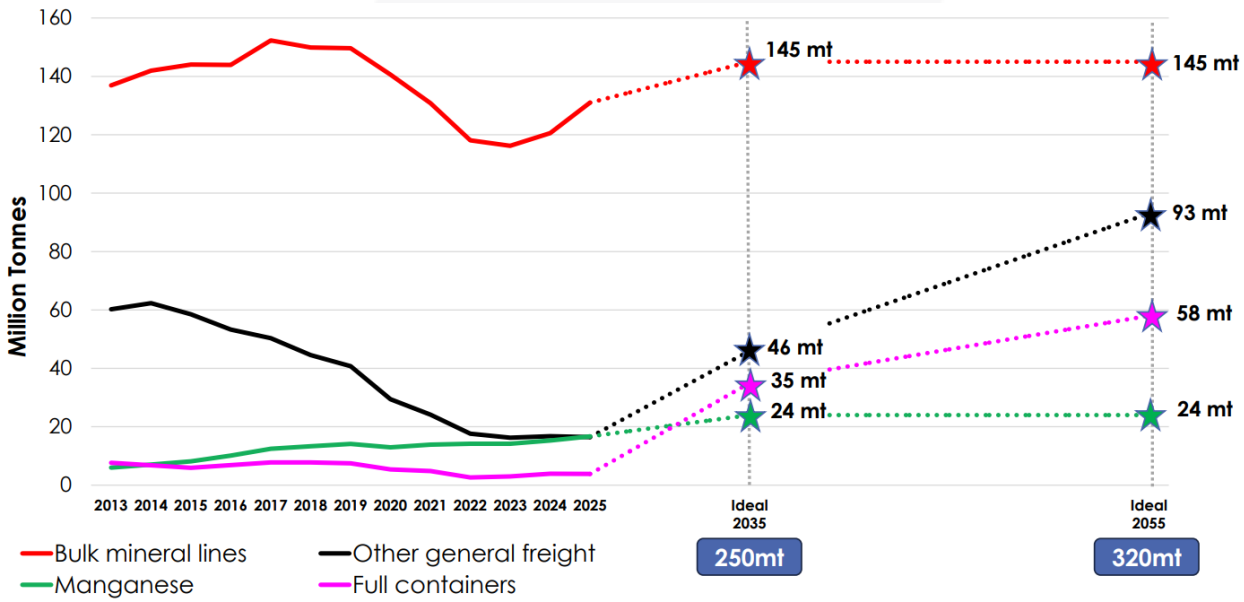
On the N4 corridor, movements increased significantly – by around **90 trucks a day**, as trains from KM4 to Maputo also increased (at an average of **2 trains per day**). Truck volumes through the border post increased to **1,502 HGVs per day** (↑**6%**, w/w). Overall, queue times **increased** to an average of **~4.7 hours** (↑**7%**) at the border. The average processing times **also increased** to an average of **~4.4 hours** (↑**5%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time **increased by half an hour this week**, as transit times **decreased by an hour and a half**. The median border crossing times at South African borders **increased** by **two and a half hours**, averaging **~11.6 hrs** (↑**31%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) **decreased by an hour** – averaging **~8.1 hrs** (↓**11%**). This week, on average, **four** SADC border posts took a day or more to cross, namely **Beitbridge, Chirundu OSBP, Kasumbalesa** (taking around **six days** to cross from the **Zambian side**) and **Katima Mulilo**.

Regional road freight continued to experience significant operational and regulatory disruptions, particularly at Beitbridge, where persistent ZIMRA system challenges prolonged northbound congestion and raised concerns over driver welfare and safety. Other developments included **(1)** renewed congestion at Kazungula and Sakania, contributing to extended transit delays; **(2)** serious security incidents along the N3 near Villiers, where five trucks were reportedly set alight during an armed attack; and **(3)** the temporary suspension of operations at Kopfontein following an infrastructure-related spillage, with processing subsequently restored on 2 November. Meanwhile, a proposed national trucking shutdown over elevated fuel prices failed to materialise, averting further disruption to domestic freight movements.

In summary, we again turn our attention to the long-term view evoked by the recently released *State of Logistics™ 2026, which* highlights the substantial opportunity for general freight rail recovery, identifying **35 million tonnes of containerised freight by 2035**, increasing to **58 million tonnes by 2055**, as desirable milestones. DGT's persistent vessel backlog reinforces the importance of an integrated, synchro modal logistics system: improving waterside productivity remains the immediate priority, but competitive rail services and effective road–rail–port connectivity are essential for sustained recovery and reducing avoidable logistics costs.

Figure 3 – South Africa's recent freight rail volumes (2013-2025) compared to its ideals for 2035 and 2055



Source: Gain Group

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 shipping industry 16
i. Container shipping – unprecedented capacity deployment amid persistent congestion 16
ii. Maritime Security – Renewed Escalation in the Strait of Hormuz 17
iii. Container orderbook – record newbuilding activity raises overcapacity concerns 17
iv. Container freight rates 18
v. Industry summary 19
b. 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 26 October to 1 November (measured in TEUs)

7-day flow reported (26/10/2026 – 01/11/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Previously Pier 2)	4,997	34,976	**↑12%**
New Pier (Pier 1)	1,931	13,517	**↓13%**
Cape Town Container Terminal	2,698	18,886	**↑76%**
Ngqura Container Terminal	2,608	18,257	**↑15%**
Port Elizabeth Container Terminal	860	6,017	**↑204%**
Other	1,253	8,770	**↑7%**
Total	**14,346**	**100,423**	**↑20%**

Source: Calculated from TPT, 2026. Updated 01/11/2026.

An average of **~14,346 TEUs** (**↑20%**) was handled per day for the last week (*26 October to 1 November, Table 2*). Consequently, throughput was notably above the projected average of **~11,979 TEUs** (**↑20%** actual versus projected). For the coming week, a decreased average of **~11,979 TEUs** (**↓17%**) is predicted to be handled (*26 October to 1 November*, *Table 3*).

Table 3 – Container Ports – Weekly flow projected for 2 to 8 November (measured in TEUs)

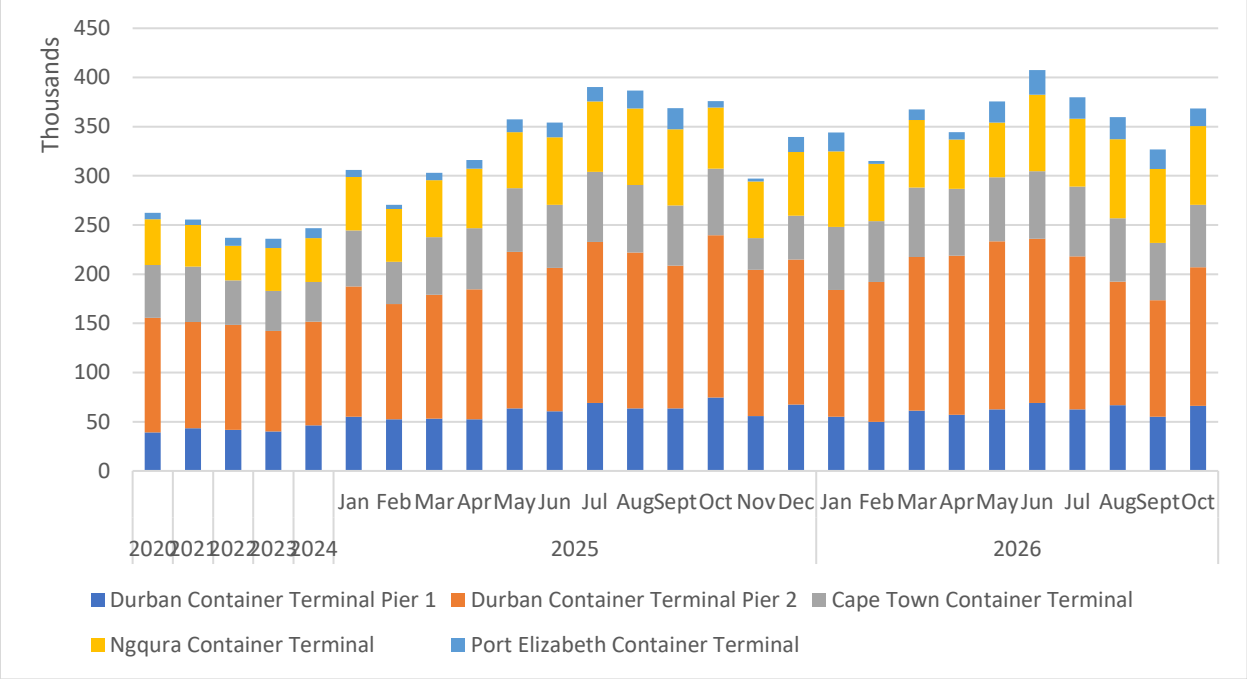
7-day flow projected (02/11/2026 – 08/11/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Previously Pier 2)[6]	4,421	30,947	**↓12%**
New Pier (Pier 1)	2,153	15,072	**↑12%**
Cape Town Container Terminal	2,144	15,005	**↓21%**
Ngqura Container Terminal	2,019	14,133	**↓23%**
Port Elizabeth Container Terminal	378	2,643	**↓56%**
Other	865	6,052	**↓31%**
Total	**11,979**	**83,852**	**↓17%**

Source: Calculated from TPT, 2026. Updated 01/11/2026.

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 01/11/2026.

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:

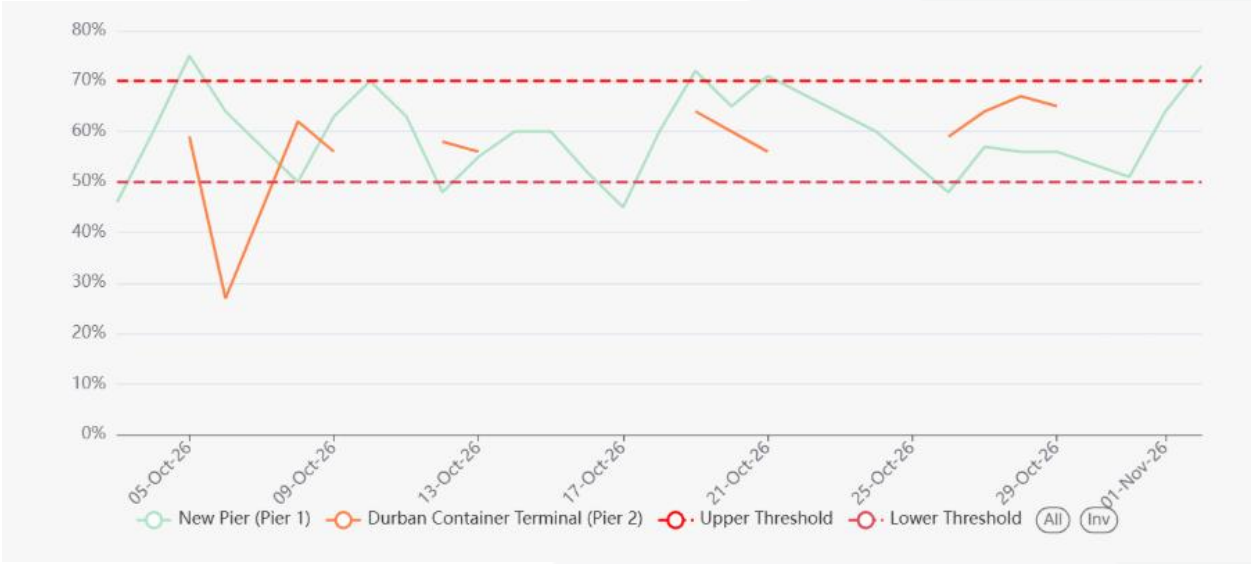
Table 4 – Vessel Dwell Time

Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.2	1.8
Cape Town	FPT	0.1	3.2
Durban	MPT	4.9	4.1
Durban	DGT	10.3	4.9
Durban	Pier 1	5.4	3.3
East London	MPT	0.1	2.0
Ngqura	NCT	1.8	2.6
Port Elizabeth	PECT	0.7	1.5

Source: Calculated from Marine Traffic AIS data, 2026. Updated 03/11/2026.

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

Figure 5 – Stack occupancy in Durban, general-purpose containers (3 October to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 01/11/2026.

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 (5 October to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 01/11/2026.

b. Summary of port operations

i. Cape Town

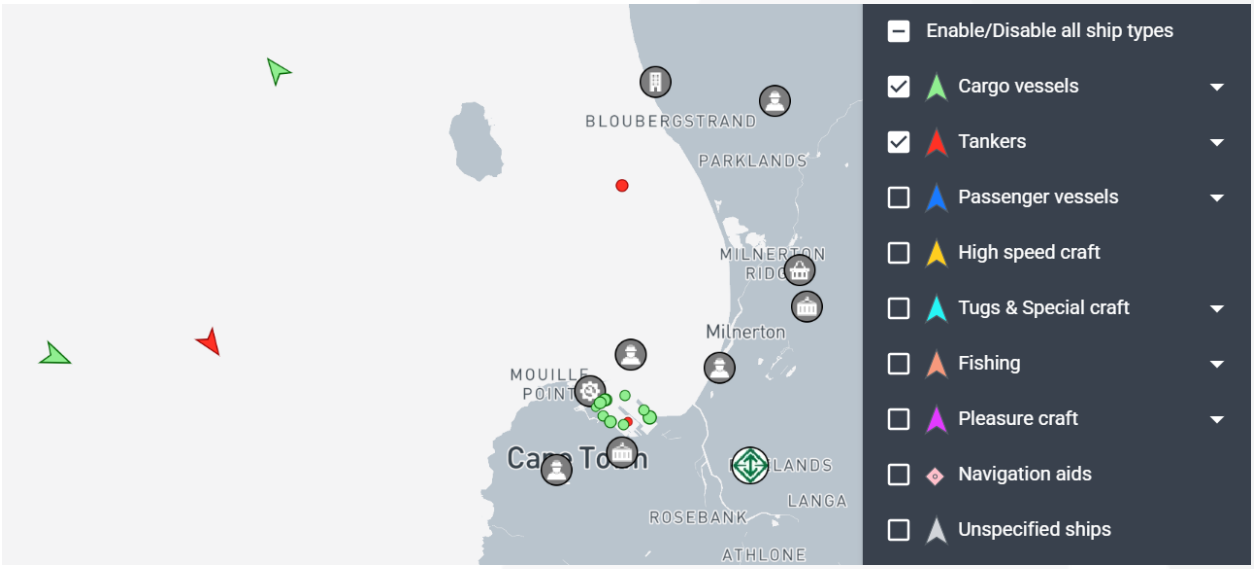
Cape Town Container Terminal reported a strong recovery, with waterside volumes up 76% to 126% of the target volume. Time at anchorage was minimal at 1 hour and with time at berth of 42 hours, with an average of one vessel waiting at anchorage. The terminal operated with an average of seven out of nine cranes and 29 of 32 RTGs available throughout the week.

Cape Town Multi-Purpose Terminal reported a significant increase in waterside volumes, reaching 79% of target — a notable improvement from last week's 12%. Vessels berthed nearly at arrival, with time at

anchorage of 1 hour and berth time 40 hours. The terminal operated with an average of two out of three cranes and three out of five straddle carriers.

AGL Terminal

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



Source: Marine Traffic. Updated 01/11/2026 at 14:00.

ii. Durban

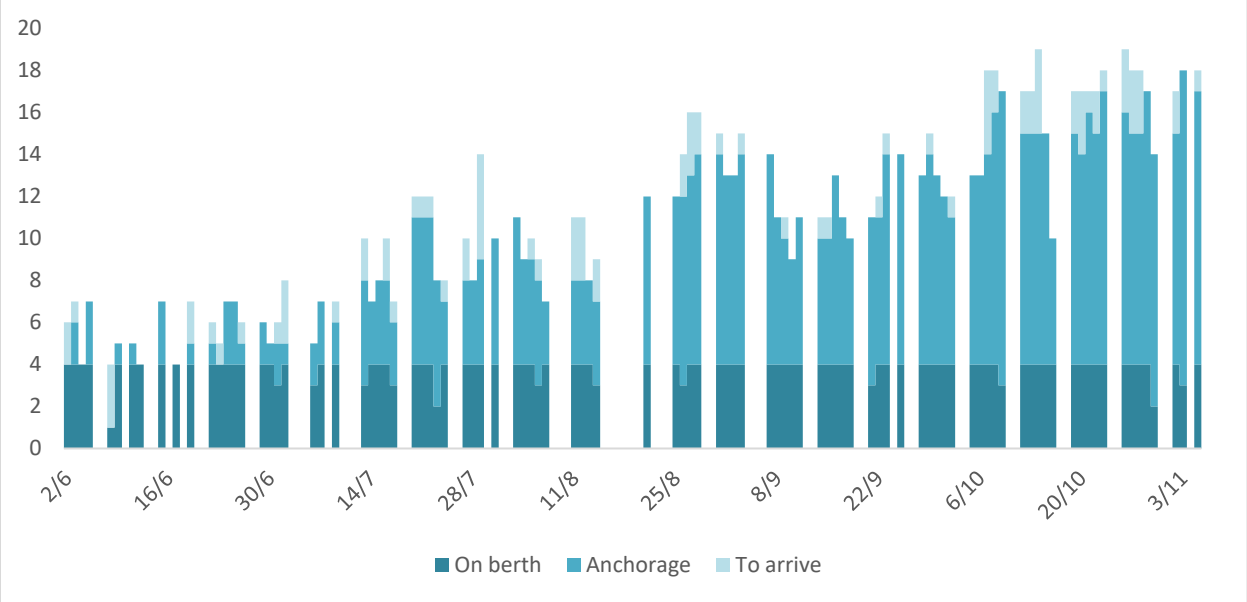
Pier 1 recorded a decline of 13%, remaining below target at 90%. Vessel turnaround time reduced, with the average time at anchorage improved to 84 hours from 123 hours and berth time was 74 hours, with an average of two vessels waiting at anchorage. The terminal operated with an average of four out of seven cranes and a full complement of RTGs throughout the week. The **TTT** for the week averaged **~44 minutes** (**↓39%**, w/w), and the average **staging time** was **~25 minutes** (**↓57%**).

Durban Gateway Terminal (DGT) recorded a notable improvement in weekly waterside throughput, increasing by **↑12% to 34,976 TEUs**, equivalent to approximately **113% of the comparable 2025 period**. Vessel turnaround times also improved marginally, with average anchorage time declining from **314 to 266 hours**, although this still represents more than **11 days waiting offshore**, with around **10 vessels at anchorage on average**. Consequently, the current situation is adding **approximately 20 days** to the supply chain.

Critically, despite some waterside improvement, the latest daily reports show that the vessel backlog remains severe: the anchorage queue increased from **11 vessels on 2 November to 15 on 3 November**, before easing only to **13 vessels on 5 November**, with a further vessel expected. Yard conditions remain comparatively stable, although general stack occupancy has risen to **70%**, with road imports on hand at **3,835 containers**.

The stronger weekly TEU figure is therefore encouraging but **has not yet translated into sustained backlog reduction**: the persistent offshore queue remains the clearest indication that DGT has stabilised operationally but has not yet recovered systemically.

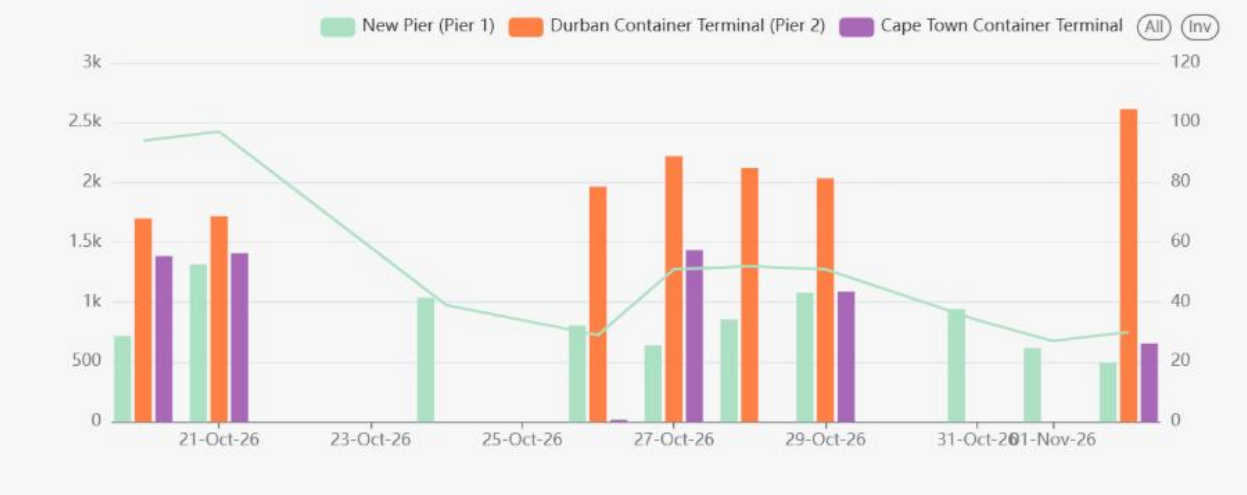
Figure 8 – DGT vessel count: on berth, at anchorage, to arrive



Source: Calculated from DGT

Durban Multi-Purpose Terminal recorded a decline of approximately 21% but remained well above target at 160%. Anchorage was 85 hours and berth time 67 hours, an average of five vessels were at anchorage.

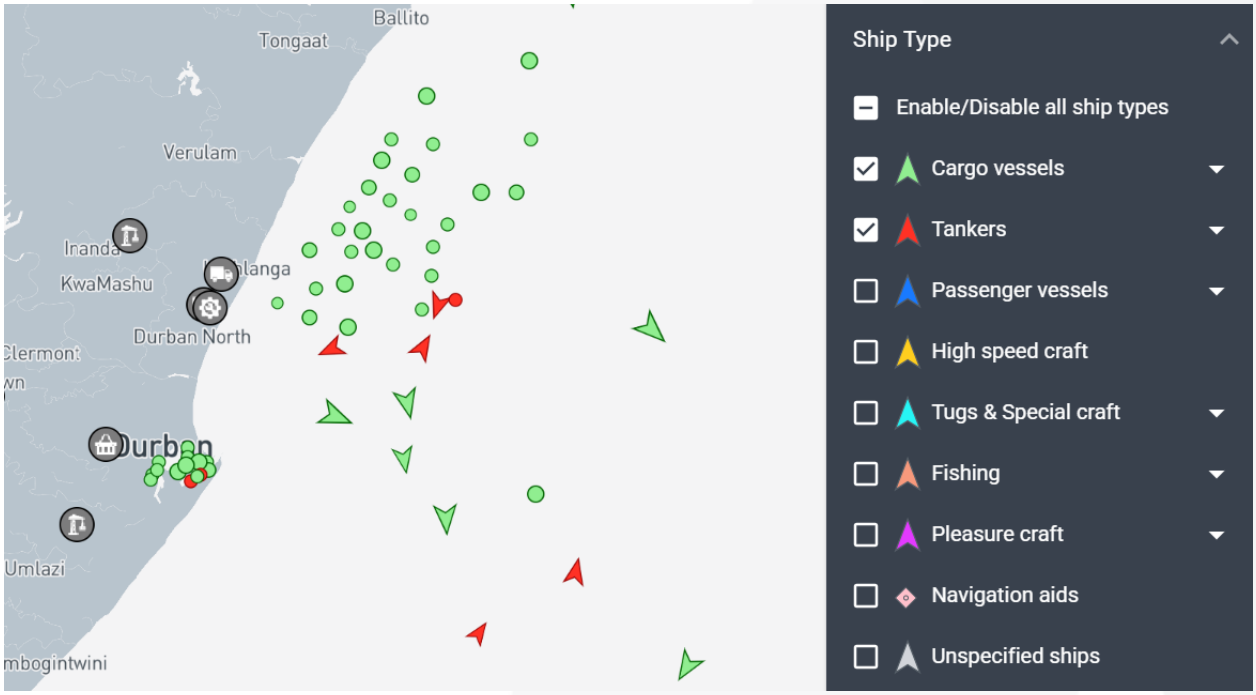
Figure 9 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 01/11/2026.

The queue of container vessels waiting outside Durban **increased** this week to **43 vessels**. On Wednesday morning (4 October), **22** (**up** from last week) container vessels were waiting outside at anchorage for Durban, **twelve** for DGT, **five** for Point and **five** for Pier 1. The queue of dry (**eleven**) increased, liquid (**five**) decreased, and breakbulk (**one**) decreased:

Figure 10 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 01/11/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal reported an increase of 15%, reaching 129% of target volumes. Average time at anchorage fell to 21 hours from 53 hours, and spending an average of 50 hours at berth. The terminal operated with a full complement of cranes and 24 of 30 RTGs throughout the week.

Port Elizabeth Container Terminal surged again, with volumes up by 204% to 228% of target volumes likely indicating continued diversion activity from Durban. Average time at anchorage was 24 hours and berth time was around 39 hours. The terminal operated with an average of two out of three cranes and 10 out of 11 straddle carriers throughout the week.

iv. Richards Bay

At RBCT, the daily average coal throughput for the week **decreased** and averaged close to **193,000 tons** (**↑3%**, w/w) per day. With an average of **26 trains per day** being serviced, **above** the target of **22**.

v. Transnet Freight Rail (TFR)

In the last week (*26 October to 1 November)*, rail cargo on the ConCor line out of Durban was reported at **2,634** containers, up by **↑40%** 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 01/11/2026.

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 (*26 October to 1 November)*. 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

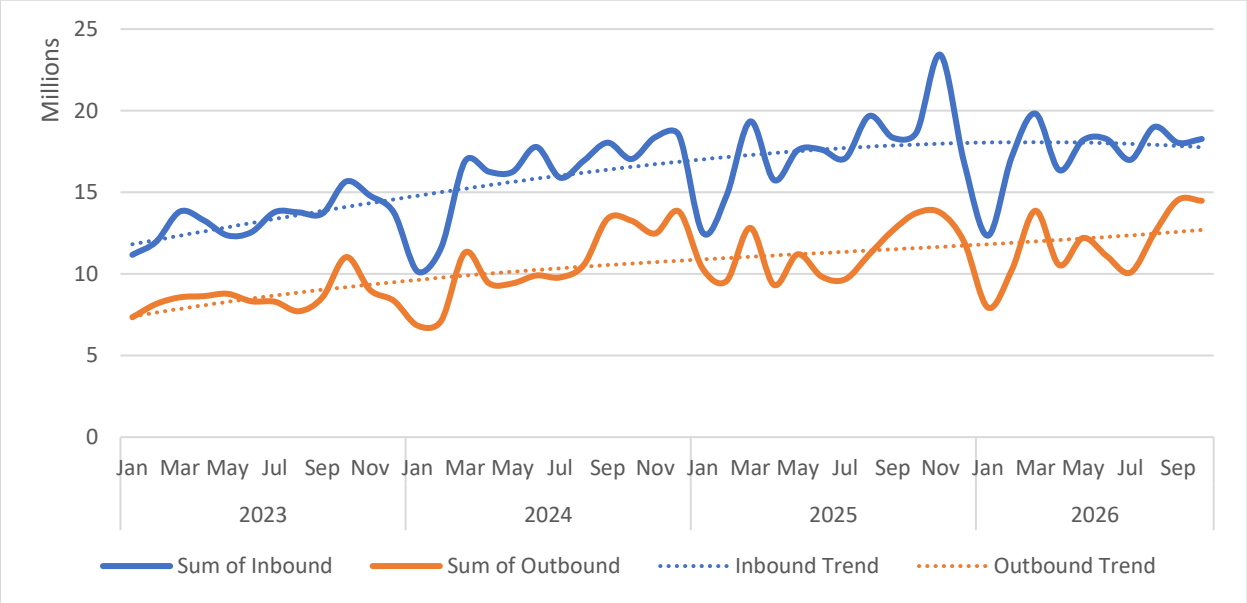
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**662,130**	**4,634,911**	**↑29%**
Volume outbound	**320,652**	**2,244,562**	**↓27%**
Total	**982,782**	**6,879,473**	**↑3%**

Courtesy of ACOC. Updated: 01/11/2026.

The latest international air cargo to and from ORTIA shows a slight increase in overall cargo – led by a significant increase in inbound cargo, as outbound cargo decreased by roughly the same magnitude. For the week, the daily average inbound cargo amounted to **~662,000 kg** (**↑29%**, w/w) and outbound **~320,600 kg** (**↓27%**). For October as a whole, cargo is up by **↑1%** versus September (m/m), and **↑6%** annually (y/y).

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

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



Calculated from ACOC. Updated: 01/11/2026.

Jet fuel stock improved in the last week and is currently stable. The latest reported fuel stock days (as of Wednesday afternoon, 4 November) per airport indicate:

- ORTIA: **5.8 days** (target: 5 days)
- CTIA: **3.4 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 (*26 October to 1 November)*, movements increased significantly – by around **90 trucks a day**, as trains from KM4 to Maputo also increased (at an average of **2 trains per day**).

- Truck volumes through the border post increased to **1,502 HGVs per day** (**↑6%**, w/w).
- Overall, queue times **increased slightly** to an average of **~4.7 hours** (**↑7%**) at the border.
- The average processing times **also increased slightly** at an average of **~4.4 hours** (**↑5%**) per crossing.

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

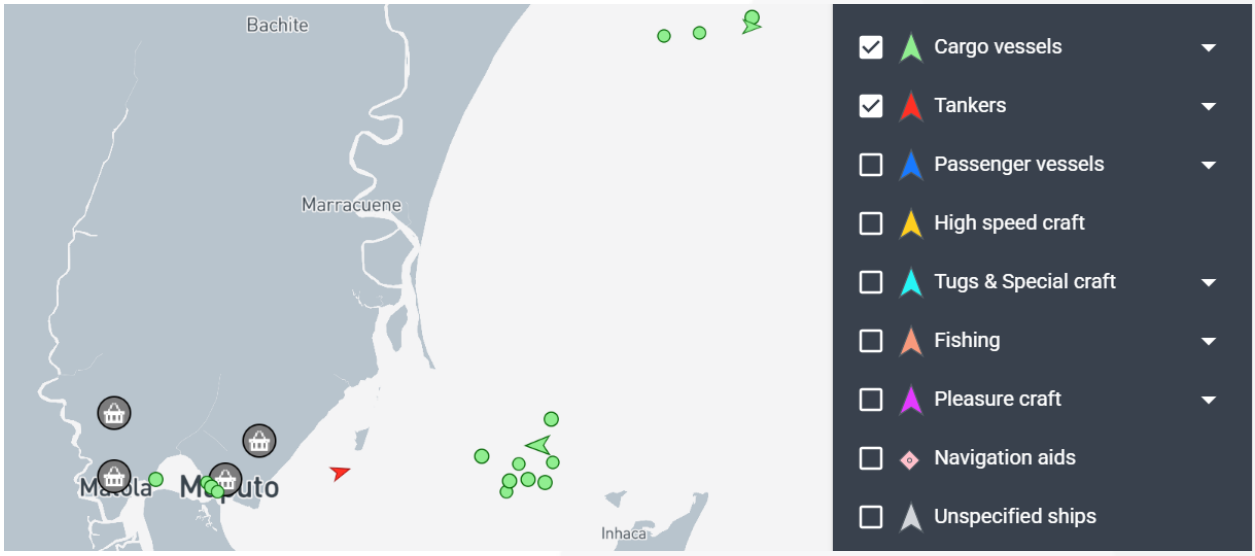
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,502	1,404	1,171	184	44	78	55	267
% (w/w)	**6%**	**-3%**	**11%**	**-3%**	**6%**	**-19%**	**-13%**	**-4%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 01/11/2026.

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 01/11/2026 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 half an hour this week**, as transit times **decreased by an hour and a half**.
- The median border crossing times at South African borders **increased** by **two and a half hours**, averaging **~11.6 hrs** (**↑31%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) **decreased by an hour** – averaging **~8.1 hrs** (**↓11%**).

1. **South Africa – Proposed National Trucking Shutdown:**
    a. On 26 October, industry notifications indicated that the Truckers Association of South Africa intended to participate in the Concerned Citizens of South Africa's (CCSA) planned national shutdown on 2 November.
    b. The proposed action demanded a 50% reduction in fuel prices, alongside changes to fuel taxes, levies and pricing arrangements.
    c. The widespread trucking disruption did not materialise, according to industry feedback, although the proposed action highlighted growing pressure on road freight operators from elevated fuel costs.
2. **Zimbabwe – ZIMRA System Disruptions and Beitbridge Congestion:**
    a. Persistent problems with ZIMRA's online customs systems continue to delay clearance and contribute to prolonged northbound truck queues, extending towards Musina.
    b. Transporters report drivers spending several days in queues, often without adequate security, sanitation, food or rest facilities, while high temperatures exacerbate difficult conditions.
    c. Drivers are reportedly reluctant to leave their vehicles for fear of losing their positions in the queue, raising further concerns about driver welfare, fatigue and road safety.

3. **Zambia/DRC – Kazungula and Sakania Border Congestion:**
    a. Transporters continue reporting extended northbound queues at Kazungula, alongside persistent congestion and processing delays at Sakania on the Zambia–DRC corridor.
    b. These disruptions continue to undermine transit reliability, increasing vehicle idle time and delaying cargo deliveries across important regional trade corridors.
4. **South Africa – N3 Freight Corridor Disruptions and Security:**
    a. On 29 October, two burning trucks obstructed the N3-S carriageway near Vaaldraai Interchange around Villiers, resulting in traffic restrictions and prolonged delays.
    b. The incident formed part of a more serious, reported security event near Grootvlei, where five trucks were set alight during an armed attack, prompting a SAPS investigation.
    c. N3 carriageways reopened by 05:45 on 30 October, although congestion persisted.
5. **South Africa/Botswana – Kopfontein Border Closure:**
    a. Operations at Kopfontein were temporarily suspended following a spillage affecting infrastructure and a neighbouring residential area, creating safety and operational concerns.
    b. The Border Management Authority (BMA) advised commercial operators and travellers to use Skilpadshek and Ramatlabama as alternative crossings.
    c. The BMA subsequently confirmed that normal processing resumed at 06:00 on 2 November, following interventions coordinated with Botswana authorities.

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

Table 7 – Delays[7] summary – South African borders[8] (both directions)

Border Post	Direction	HGV[9] 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	636	34.9	6.5	35.0	19,080	4,452
Beitbridge	Zimbabwe-SA	453	4.3	1.2	4.1	13,590	3,171
Groblersbrug	SA-Botswana	247	15.2	1.5	15.2	7,410	1,729
Martin's Drift	Botswana-SA	167	2.0	0.3	2.0	5,010	1,169
Kopfontein	SA-Botswana	242	6.2	2.1	6.1	7,260	1,694
Tlokweng	Botswana-SA	63	0.7	0.2	0.4	1,890	441
Vioolsdrift	SA-Namibia	30	4.3	1.5	4.2	900	210
Noordoewer	Namibia-SA	20	2.0	0.5	1.6	600	140
Nakop	SA-Namibia	30	4.1	1.0	4.1	900	210
Ariamsvlei	Namibia-SA	20	1.2	0.4	1.1	600	140
Skilpadshek	SA-Botswana	334	17.2	3.2	17.1	10,020	2,338
Pioneer Gate	Botswana-SA	78	2.0	1.5	1.6	2,340	546
Ramatlabama	SA-Botswana	223	6.5	1.5	6.3	6,690	1,561
Ramatlabama	Botswana-SA	101	0.7	0.2	0.4	3,030	707
Lebombo	SA-Mozambique	1,388	4.7	2.0	4.4	41,640	9,716
Ressano Garcia	Mozambique-SA	1,407	2.9	0.3	2.6	42,210	9,849
Sum/Average		**5,439**	**6.8**	**1.5**	**6.6**	**163,170**	**38,073**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 25/10/2026.

[7] 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.
[8] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[9] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

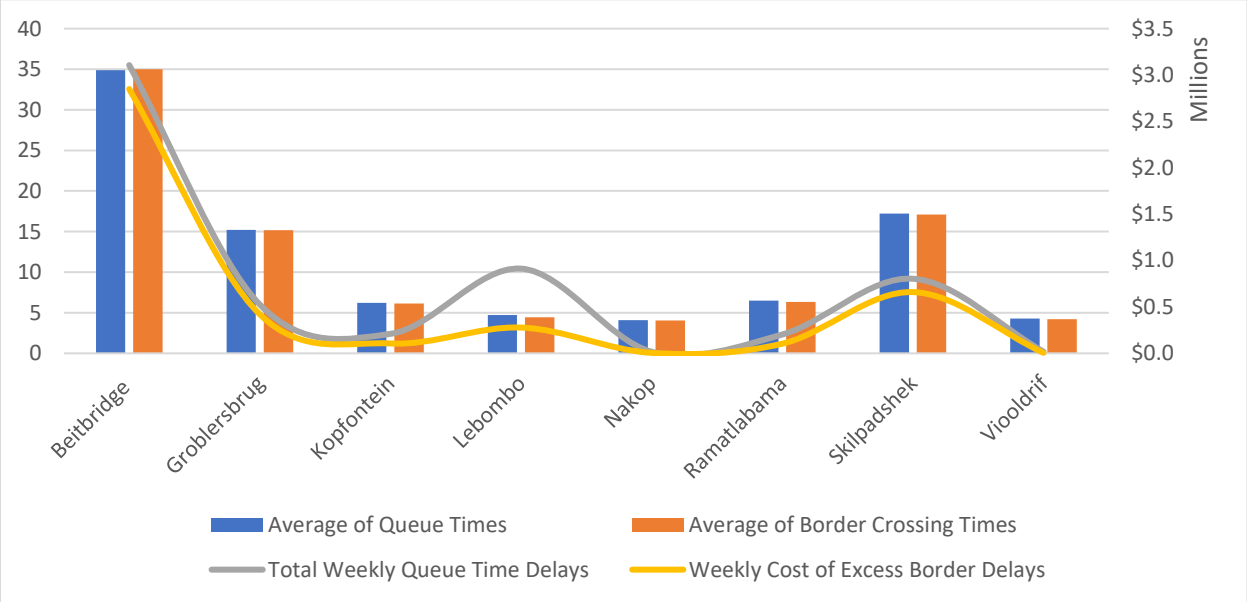
Table 8 – Delays summary – Corridor perspective

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	7.4	2.1	7.2	9,600	2,240
Central Corridor	798	1.1	0.1	1.0	23,940	5,586
Dar Es Salaam Corridor	1,819	28.3	5.6	27.9	54,570	12,733
Maputo Corridor	2,795	3.8	1.2	3.5	83,850	19,565
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,628	18.1	3.4	17.9	108,840	25,396
Northern Corridor	2,817	0.8	0.2	0.8	92,520	21,588
WBNLD Corridor	1,071	4.8	1.2	4.6	32,130	7,497
Trans Cunene Corridor	100	2.9	0.8	2.7	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	25.0	1.8	24.7	3,480	812
Sum/Average	**13,691**	**8.6**	**1.6**	**8.5**	**418,740**	**97,706**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 25/10/2026.

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

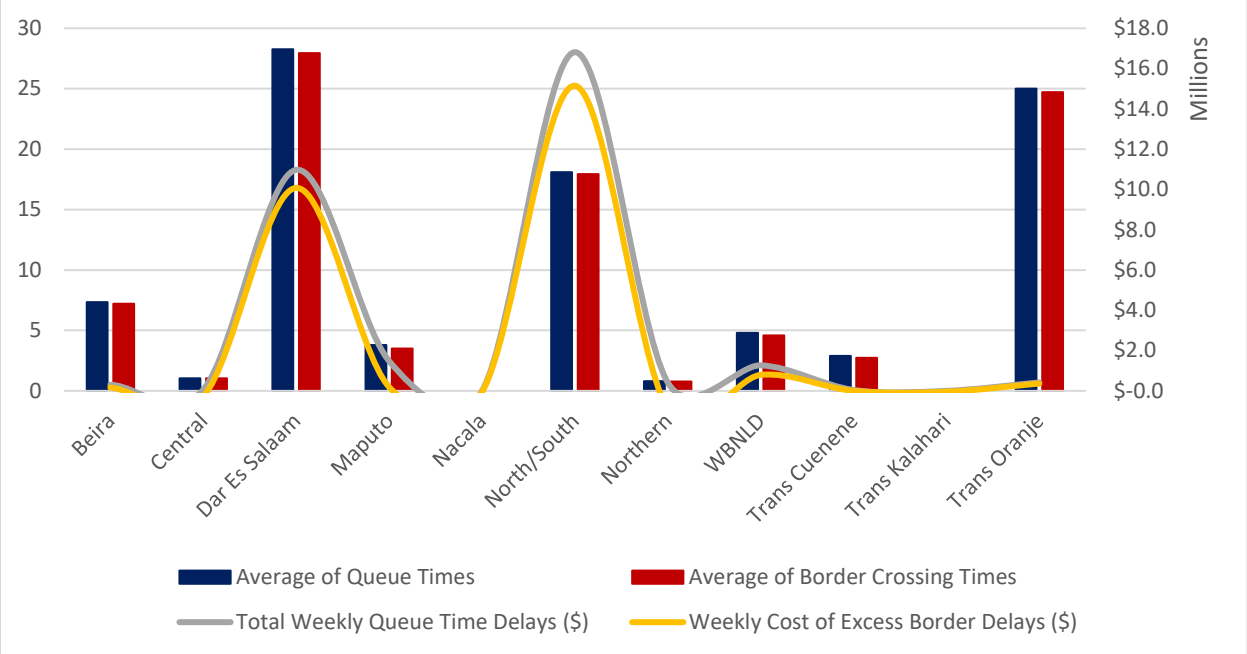
Figure 14 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 25/10/2026.

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 25/10/2026.

In summary, cross-border queue time averaged **~8.6 hours** (up by **~0.5 hours** from the previous week's **~8.1 hours**), indirectly costing the transport industry an estimated **$31.8 million** (**R530 million**). Furthermore, the week's average cross-border transit times also hovered around **~8.5 hours** (down by **~0.6 hours** from the previous week's **~9.1 hours**), at an indirect cost to the transport industry of **$25.5 million** (**R425 million**). The total indirect cost for the week amounts to an estimated **~$57.2 million** (**R955 million**, up by **↑7%** from the **~R893 million** in the previous report).

4. International Update

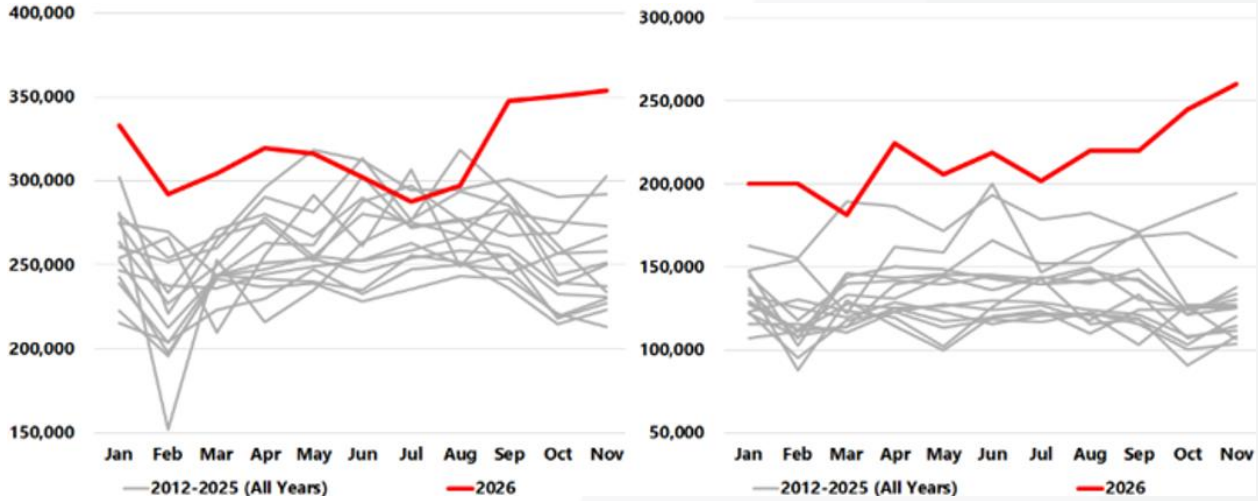
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Container shipping – unprecedented capacity deployment amid persistent congestion

Global container shipping capacity has reached unprecedented levels across the major East–West trade lanes, despite continued port congestion and schedule disruptions. According to *Sea-Intelligence*, average weekly deployed capacity in October and November exceeded **350,000 TEU on Asia–North Europe** and **260,000 TEU on Asia–Mediterranean**, considerably above historical seasonal patterns. Transpacific capacity is similarly elevated, with Asia–North America West Coast deployment approaching **400,000 TEU/week** in November. However, these increases partly reflect vessel bunching and delayed departures from Asian ports rather than underlying demand growth.

Figure 16 – Average Weekly Deployed Capacity: Asia-North Europe (LH) and Asia-Mediterranean (RH)



Source: Sea Intelligence

Meanwhile, *Linerlytica* reports record congestion at Middle Eastern ports and renewed European disruptions, even as carriers accelerate their return to Suez. For the Port of Durban (all terminals), *Linerlytica* reports a *"queue-to-berth"* ratio of **1.40** on 1 November – up from **1.25** last week. Shanghai-Ningbo, incidentally, is currently at **1.64**. With November freight-rate increases failing to gain traction, growing effective capacity and weaker seasonal demand are placing renewed downward pressure on freight rates.

ii. Maritime Security – Renewed Escalation in the Strait of Hormuz

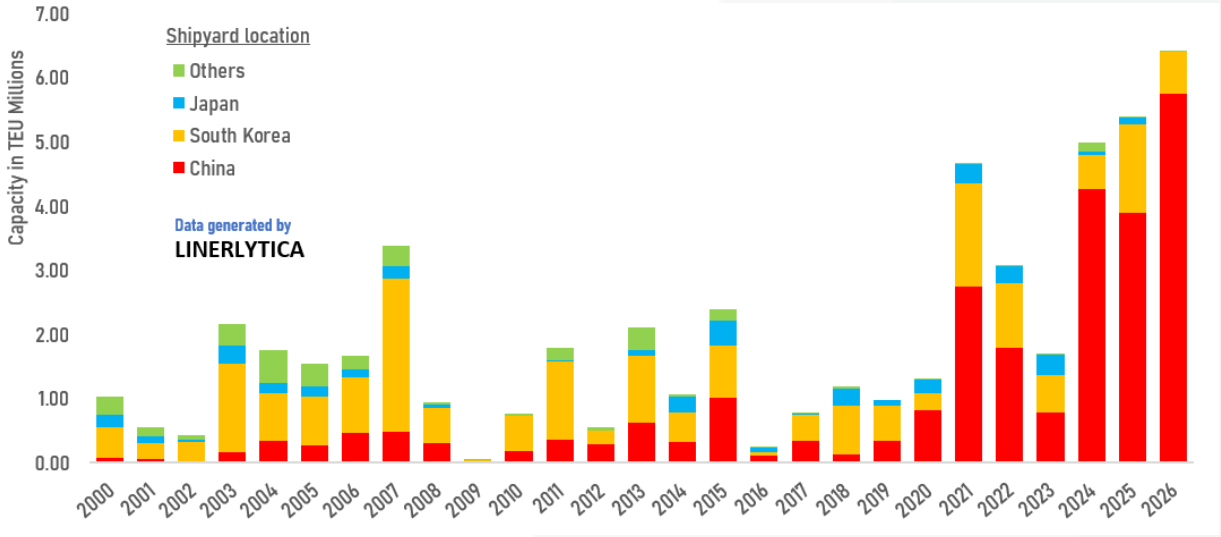
Maritime security conditions in the Strait of Hormuz deteriorated further during the final week of October, following renewed attacks on commercial vessels. On 29–30 October, several vessels sustained damage, including a tanker reportedly struck by limpet mines near Oman.[10] The incidents reinforce the continued vulnerability of international energy supply chains and the elevated risks facing operators in the Persian Gulf. Tanker freight markets remain under considerable pressure, with Reuters reporting record freight rates for Russian crude shipments to India as vessel shortages, sanctions-related routing and Black Sea security risks constrain available tonnage. Meanwhile, Brent crude increased by approximately **↑13.6%** during October, closing the month at **US$117.64/barrel**. These developments highlight the continuing transmission of geopolitical disruptions through energy prices, freight costs and global supply chains.

iii. Container orderbook – record newbuilding activity raises overcapacity concerns

The global containership orderbook continues to expand at an unprecedented pace, raising concerns about structural overcapacity over the coming years. According to *Linerlytica*, approximately **6.4 million TEU** of new capacity was ordered during the first ten months of 2026, surpassing all previous annual records. The total orderbook has consequently reached **16.6 million TEU (47.8% of the active fleet)**, with Chinese shipyards accounting for **89% of new orders** this year.

[10] IMO. 02/11/2026. Middle East - Highlighted (Confirmed) incidents.

Figure 17 – New containerships ordered with breakdown by yard location (2000-2026)



Source: Linerlytica

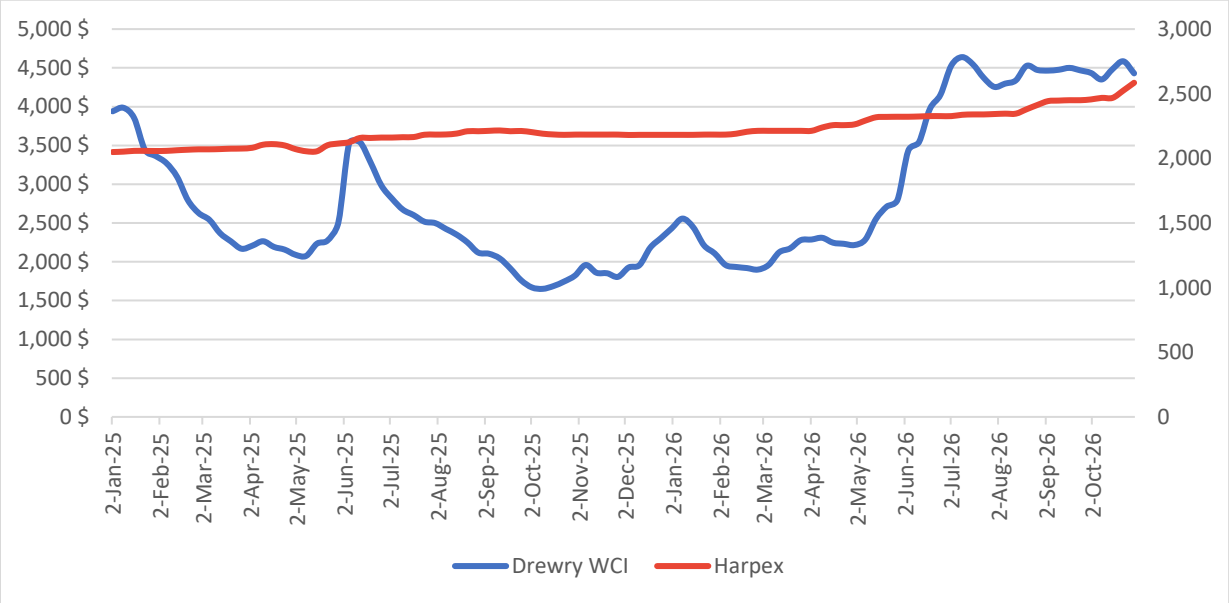
Alphaliner similarly highlights the scale of newbuilding commitments, alongside a growing preference for LNG dual-fuel vessels, which represent 56% of contracted capacity, compared with 12% for methanol.[11] Although immediate vessel availability remains constrained, the combination of substantial newbuilding deliveries and shorter Suez routings threatens to release significant effective capacity into an already softening market, increasing downward pressure on freight rates.[12]

iv. Container freight rates

Container freight rates declined in the latest week, reversing two consecutive weekly increases. *Drewry's World Container Index* (WCI) decreased by **↓3.4%** (or **$156**, w/w) to **$4,429/FEU** on 29 October, driven primarily by Transpacific weakness. Shanghai–Los Angeles rates fell **↓6%** to **$7,514**, while Shanghai–New York declined **↓5%** to **$9,631**. Conversely, Shanghai–Rotterdam increased **↑1%** to **$3,686**, with Shanghai–Genoa stable at **$4,151**. Despite weakening spot rates, the charter market strengthened further, with the **Harpex Index increasing by ↑2.4% to 2,585 points** on 30 October, reflecting continued demand for vessel employment, particularly larger containerships.

[11] Alphaliner. 28/10/2026. Orderbook soars past 15 Mteu: LNG and conventionally powered ships in high demand, while methanol falls out of favour.
[12] Koo, A. 03/11/2026. Major liners set to resume all Asia-Europe services through Suez.

Figure 18 – World Container Index (WCI) and Harper-Petersen Index (Harpex)



Source: Calculated from Drewry and Harpex

Meanwhile, the *Shanghai Containerised Freight Index* (SCFI) remained broadly stable, increasing marginally by **↑0.16%** to **3,687.35 points**. Overall, freight markets remain relatively stable but increasingly vulnerable to excess capacity, weaker seasonal demand and the progressive return to shorter Suez routings.

v. Industry summary

Other developments of note included the following:

1. **Dry-bulk markets – divergent freight rate movements:**
    a. The *Baltic Dry Index* closed on 30 October at **2,714 points** (**↑2%** over the week), with Capesize rates strengthening on firmer iron-ore demand, while Panamax and smaller-vessel markets weakened.
    b. Despite the weekly recovery, the benchmark declined by more than **12%** over October, illustrating uneven commodity-shipping conditions.
2. **European ports – industrial action and operational disruptions:**
    a. Industrial action on 30 October affected several European ports, while additional disruptions around Rotterdam and Antwerp compounded existing operational pressures.[13]
    b. Rotterdam faced cargo-handling interruptions, with congestion reportedly reaching approximately 77 hours, while Antwerp experienced pilotage disruptions and vessel delays.
    c. Further industrial action was also scheduled for French ports on 5–6 November.

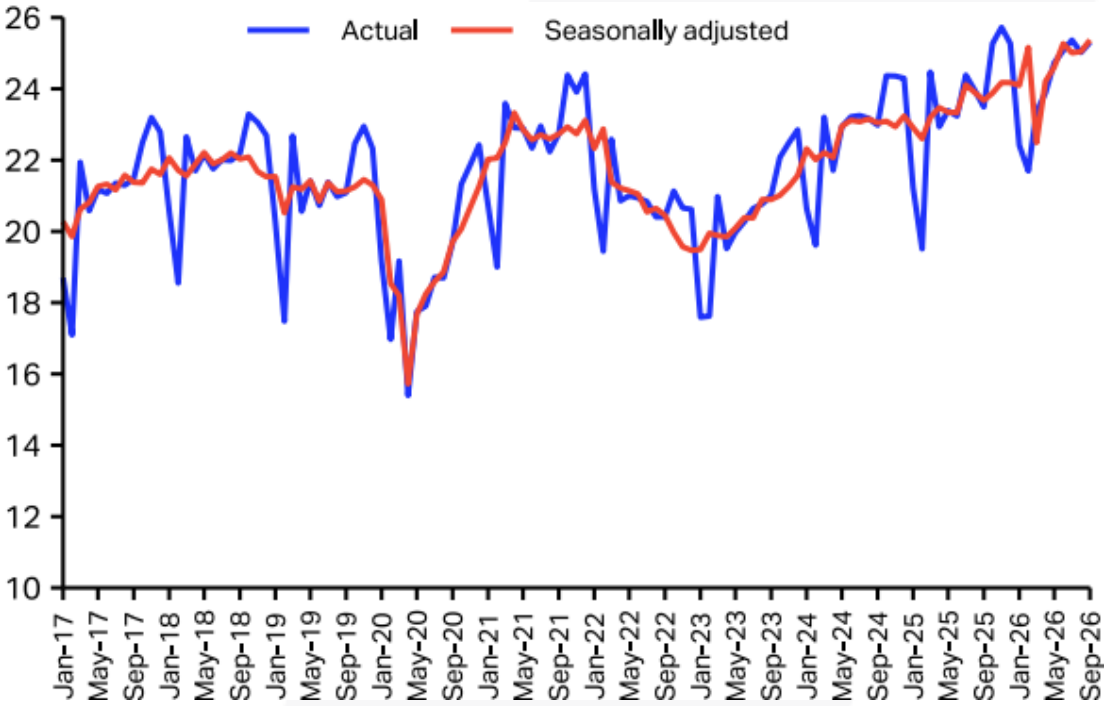
[13] Corbet. S. 30/10/2026. Dockworkers worldwide strike against arms shipments and to demand better working conditions.

3. **US–China maritime policy – Proposed extension of port-fee suspension:**
    a. On 26 October, the US Trade Representative formally proposed extending the suspension of Section 301 maritime measures targeting China's shipping, logistics and shipbuilding sectors by two months, through 9 January 2027.
    b. This could provide temporary regulatory certainty for carriers, although the extension was still a proposal at the time of the reporting period.

b. Global air cargo industry

Global air cargo demand accelerated in September, with worldwide cargo tonne-kilometres (CTKs) increasing by **↑7.7%** (y/y), according to *IATA*. International demand expanded by **↑8.6%**, while available capacity increased by only **↑2.7%**, lifting the global cargo load factor to **47.9%** (**↑2.2** percentage points). North American carriers recorded the strongest growth (**↑11.8%**), followed by Asia Pacific (**↑8.6%**), while African carriers registered **↑4.7%** growth. Notably, Asia–North America traffic increased by **↑17%**, supported by technology and AI-related shipments, whereas Europe–Middle East traffic contracted by **↓18%**. Despite strengthening demand, operating costs remain a major concern, with jet-fuel prices increasing by **↑103.4%** (y/y) in September, considerably exceeding the **↑25.9%** increase in cargo yields.

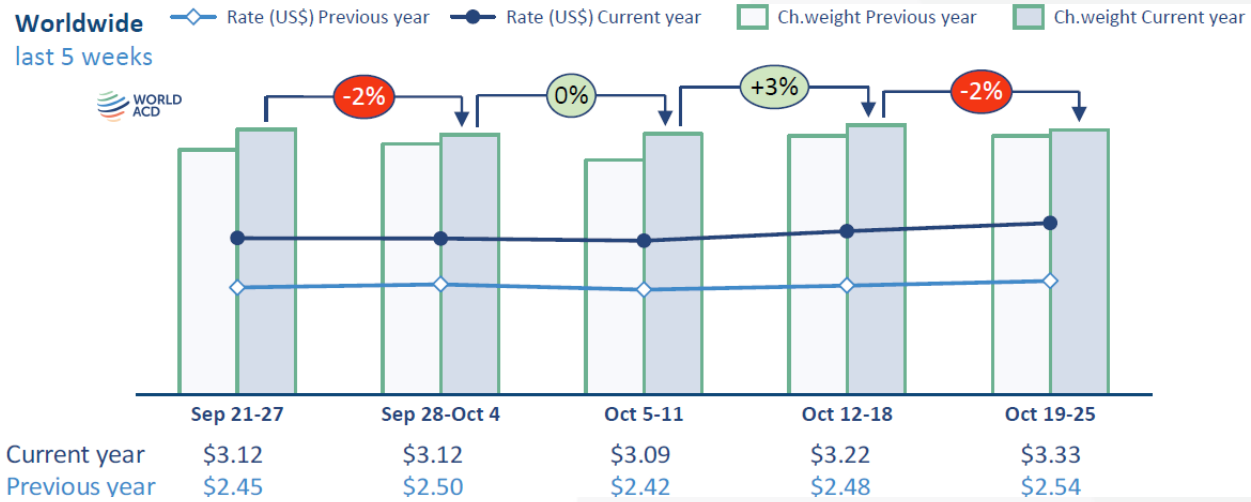
Figure 19 – Industry CTKs (billions)



Source: IATA

According to the latest figures from World ACD, global air cargo rates continued strengthening in Week 43 despite softer volumes, reflecting mounting peak-season capacity pressures. According to WorldACD, worldwide chargeable weight declined by **↓2%** (w/w), while capacity contracted by **↓1%**. Nevertheless, average spot rates increased by **↑5% to $3.80/kg** (**↑38%**, y/y), with full-market rates rising by **↑3%** to **$3.33/kg** (**↑31%**, y/y).

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



Source: WorldACD

Transpacific spot rates reached **$7.43/kg** (**↑7%**, w/w), supported by strong AI-related demand. Regional divergence remains pronounced, with Asia–US volumes **↑9%** (y/y), compared with **↓16%** on Asia–Europe. Meanwhile, Arabian Gulf capacity remains **↓19%** below pre-conflict levels, sustaining upward pressure on freight rates.

ENDS[14]

[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.*

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@saaff.org.za