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Cargo Movement Update #308[1]

Date: 15 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)	41,726	47,537	**89,263**	33,622	38,305	**71,927**	↑24%
Air Cargo (tons)	5,642	4,200	**9,842**	4,635	2,245	**6,879**	↑43%

Monthly Snapshot

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

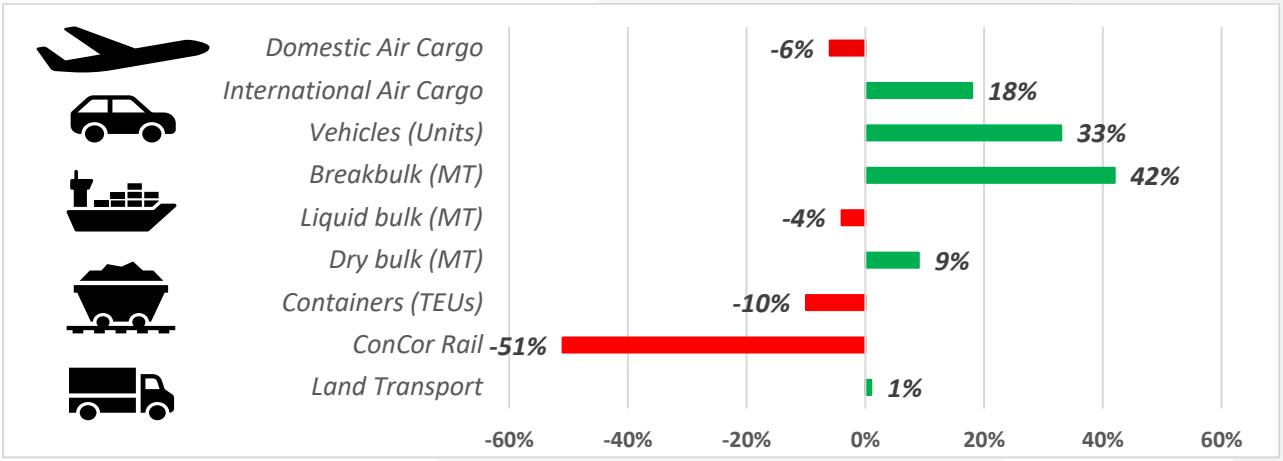
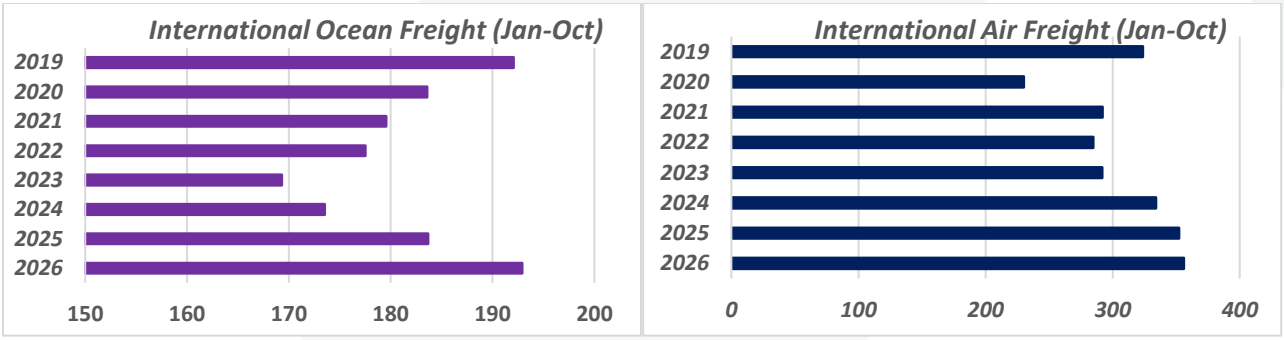


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **12,752 TEUs** was handled per day, with **11,979 TEUs** projected for next week.
- **DGT latest**: **~5,190 TEUs/day** (**↑28%**, w/w). Yard: **69%**; queue **@11 vessels (↓3)**; **20+ days** of delays remain.
- **TNPA Oct**: **Containers**: **↓35%** (m/m); **↑2.4%** (YTD). **Bulk**: **↓17%** (m/m); **↑5%** (YTD). **Vehicles**: **↓19%** (m/m).
- Rail cargo handled out of Durban was reported at **1,514** containers, down by **↓37%** versus last week.
- **Carrier integration**: Over **15 terminal equity deals** completed or pending globally in 2026 (*Alphaliner*).
- Global air cargo **↓2%** (w/w) with capacity unchanged. Rates surging (**↑2%** to **$3.45/kg** & **↑31%**, y/y).

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *308th* 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: October vs. October.
[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 **12,752 TEUs** was handled daily, an increase from **10,275 TEUs** the previous week.

DGT recorded its **strongest waterside performance in four months**, with weekly throughput increasing by **↑28%**, providing a welcome indication that higher operating rates remain achievable. However, the recovery remains incomplete: average anchorage time worsened to **263 hours**, with **11 vessels still waiting offshore**, confirming that the backlog is being reduced too slowly despite the stronger week. The current end-to-end **delay of 20+ days** therefore remains. Further vessel omissions may therefore be required to protect schedules and relieve pressure. Transnet has now announced additional measures — including **(1)** Berth 102 capacity, **(2)** further diversions to Ngqura, **(3)** increased Pier 1 crane availability and **(4)** additional rail evacuation — but sustained execution will be required before the vessel queue materially normalises.

Elsewhere, port operations in Durban showed *some signs of improvement* this week, with improved vessel turnaround times at Pier 1 and an increase to five cranes in operation, likely contributing to an increase in waterside volumes. Durban MPT showed a similar trend with a strong volume recovery, though anchorage remained extremely elevated at 261 hours. In the Western Cape, CTCT continued its declining trend, falling to 62% of target volumes— its third consecutive weekly decline — though anchorage remained minimal. Cape Town MPT slowed to 34% of target with all cranes now operational. In the Eastern Cape, both terminals recovered, with Ngqura returning above target at 129% and waiting time easing to 1 day. Port Elizabeth improved to 73%, though vessel calls remain low. Weather delays are anticipated for the Eastern and Western Cape for the coming week.

Several key themes continue to dominate global container shipping, notably **(1)** expanding capacity, **(2)** persistent operational disruption, and **(3)** growing carrier control over port infrastructure. *Alphaliner* identified **more than 15 completed or pending terminal equity transactions** among leading carriers in 2026, reflecting accelerated vertical integration and competition for strategic port access. Meanwhile, *Linerlytica* reports increased capacity deployment on Far East–Middle East trades, despite the gradual return to Suez Canal transits releasing effective vessel capacity.

Congestion across the Middle East and Indian subcontinent now exceeds **500,000 TEU**, while deployment on Far East–West Africa services has nearly doubled since 2022. Freight rates softened, with *Drewry's WCI* declining **2%** (w/w) to **$4,305/FEU**, and the *SCFI* falling **1.68%** to **3,572.33 points**. Operational constraints remain significant, with more than **3.6 million TEU** (over **10%** of the global fleet) tied up in congestion, while schedule reliability deteriorated to **48.3%** in October. French port industrial action and escalating Black Sea security risks added further uncertainty. Collectively, these developments emphasise the growing divergence between nominal vessel capacity and effective, reliable shipping services.

For October, South Africa's international air cargo volumes increased by **↑18%** (m/m) to a record **46.6 million kg**, representing growth of **↑5%** (y/y). The increase was primarily driven by Johannesburg, where volumes rose by **↑12%** (m/m) and **↑3%** (y/y), while Cape Town recorded particularly strong growth (**↑36%**, m/m; **↑11%**, y/y). Durban also recovered significantly on a monthly basis (**↑18%**), although volumes remained below last year's levels (**↓4%**, y/y). Overall, the record national performance reflects broad-based monthly growth, notwithstanding some persistent regional disparities.

For October, South Africa's domestic air cargo volumes declined marginally by **↓1%** (m/m), while remaining **↓6%** (y/y) below the corresponding period in 2025. Johannesburg recorded broadly stable monthly volumes

(↑**0.2%**), although throughput declined by ↓**5%** (y/y). Cape Town experienced a more pronounced contraction (↓**3%**, m/m; ↓**9%**, y/y), while Durban also recorded a monthly decline (↓**6%**), despite marginal annual growth (↑**1%**, y/y). Overall, domestic air cargo continues to underperform relative to international flows, with the modest monthly decline masking more persistent year-on-year weakness across the country's principal air cargo terminals.

Global air cargo rates strengthened further in Week 45, increasing by ↑**2%** to **$3.45/kg** (↑**31%**, y/y), despite worldwide tonnages declining by ↓**2%** (w/w) and capacity remaining broadly unchanged. Asia Pacific–US volumes increased by ↑**13%** (y/y), driven by strong technology-related demand from Taiwan, while China–Europe and Hong Kong–Europe volumes declined by ↓**13%** and ↓**32%** (y/y), respectively. Persistent capacity constraints, geopolitical disruptions and divergent regional demand continue supporting elevated freight rates, even as the anticipated peak-season volume surge has yet to materialise.

On the N4 corridor, movements decreased significantly – by around **76 trucks a day**, as trains from KM4 to Maputo also decreased (to an average of **1 train per day**). Truck volumes through the border post decreased to **1,416 HGVs per day** (↓**5%**, w/w). Overall, queue times **increased slightly** to an average of **~5 hours** (↑**6%**) at the border. The average processing times **were similar** at an average of **~5 hours** (↑**21%**) per crossing.

Weekly land border crossing figures in the SADC region were relatively stable this week, as the average queue time **increased by half an hour this week**, as transit times **were stable**. The median border crossing times at South African borders **increased** by **an hour**, averaging **~9.7 hrs** (↑**12%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) **was stable** – averaging **~6.2 hrs** (↓**2%**). This week, on average, **four** SADC border posts took around a day or more to cross, namely **Chirundu OSBP, Cuchamano**, **Kasumbalesa** (taking **three days** to cross from the **Zambian side**), and **Katima Mulilo**.

Regional road freight continued to experience operational and regulatory challenges, with developments including **(1)** power disruptions at Kopfontein, Skilpadshek and Oshoek, resulting in border processing delays and traffic diversions; **(2)** persistent congestion along the DRC Copperbelt corridor, where northbound queues towards Kanyaka reportedly reached **30 km**, alongside proposed restrictions on mineral export payloads; and **(3)** interruptions to SARS digital services associated with the global Microsoft outage. Encouragingly, Botswana reported improved traffic management at Kazungula, with new digital monitoring measures contributing to truck queues reportedly declining to less than one kilometre. Collectively, these developments reinforce the importance of reliable border infrastructure, regulatory certainty and coordinated corridor management in facilitating regional trade.

The ongoing challenges – as widely circulated in the national news this week – at Durban Gateway Terminal (DGT) reinforce the importance of getting South Africa's port reform agenda right. Internationally, *Alphaliner* reports an acceleration in container carriers acquiring terminal equity, highlighting the strategic value of port infrastructure and the growing integration of global shipping and logistics networks (see the international section below). For South Africa, the opportunity is substantial, but success depends on two fundamental considerations: **(1) selecting the right operating partner for each individual asset**, based on its operational requirements, investment needs and role within the broader logistics network; and **(2) negotiating the right commercial arrangement for the country**, with clearly defined responsibilities, decision-making rights, investment commitments, performance obligations and safeguards for fair market access. DGT's difficulties demonstrate that private-sector participation is not an outcome in itself, but a mechanism for achieving better outcomes. Ultimately, reform must be judged by **additional freight moved, improved reliability, shorter turnaround times and lower end-to-end logistics costs**. The measure of success is not the value of the transaction, but the competitiveness it delivers to the South African economy.

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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 9 to 15 November (measured in TEUs)

7-day flow reported (09/11/2026 – 15/11/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Previously Pier 2)	5,190	36,332	↑28%
New Pier (Pier 1)	2,470	17,288	↑10%
Cape Town Container Terminal	1,331	9,317	↓21%
Ngqura Container Terminal	2,607	18,252	↑59%
Port Elizabeth Container Terminal	277	1,942	↑211%
Other	876	6,132	↑56%
Total	**12,752**	**89,263**	↑24%

Source: Calculated from TPT, 2026. Updated 15/11/2026.

An average of **~12,752 TEUs** (↑24%) was handled per day for the last week (*9 to 15 November, Table 2*). Consequently, throughput was above the projected average of **~11,979 TEUs** (↑6% actual versus projected). For the coming week, an increased average of **~11,979 TEUs** (↓6%) is predicted to be handled (*16 to 22 November*, *Table 3*).

Table 3 – Container Ports – Weekly flow projected for 16 to 22 November (measured in TEUs)

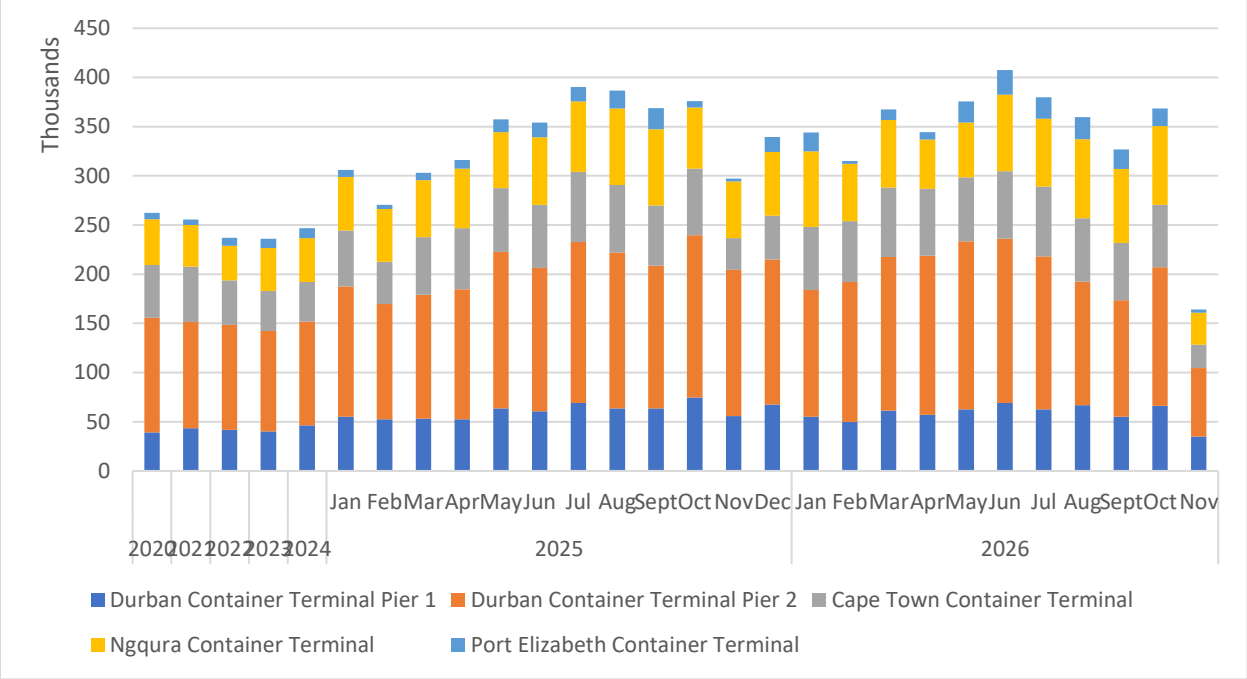
7-day flow projected (16/11/2026 – 22/11/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Previously Pier 2)[6]	4,421	30,947	↓15%
New Pier (Pier 1)	2,153	15,072	↓13%
Cape Town Container Terminal	2,144	15,005	↑61%
Ngqura Container Terminal	2,019	14,133	↓23%
Port Elizabeth Container Terminal	378	2,643	↑36%
Other	865	6,052	↓1%
Total	**11,979**	**83,852**	↓6%

Source: Calculated from TPT, 2026. Updated 15/11/2026.

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



Source: Calculated from TPT, 2026, and updated 15/11/2026.

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	1
Cape Town	FPT	0	2
Durban	DGT	9	4
Durban	MPT	11	2
Durban	Pier 1	3	3
East London	MPT	0	1
Ngqura	NCT	1	2
Port Elizabeth	PECT	1	1

Source: Calculated from Marine Traffic AIS data, 2026. Updated 10/11/2026.

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

Figure 4 – Stack occupancy in Durban, general-purpose containers (16 October to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 15/11/2026.

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 (16 October to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 15/11/2026.

b. TNPA: October update

TNPA has released consolidated port statistics for October[7], with all main sectors decreasing since September:

- Container throughput totalled **297,470 TEUs**, which is significantly down on a monthly basis (by **↓35%,** m/m), and down by **↓10%** versus 2025 (y/y).
- Total bulk cargo totalled **16.656 million tonnes**, which is also significantly down (by **↓17%** m/m), but up by **↑8%** (y/y) from last year in October.
- Vehicle throughput totalled **81,343 units**, which is down by **↓19%** (m/m), but up by **↑33%** (y/y).

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

[7] Transnet. 2026. Port statistics.

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

	September	October	Movement	% change
Containers (TEUs)	**460,166**	**297,470**	**-162,696**	**-35%**
Landed	239,930	153,781	-86,149	-36%
Shipped	220,236	143,689	-76,547	-35%
Dry bulk (MT)	16,057,007	13,468,344	-2,588,663	-16%
Liquid bulk (MT)	3,372,938	2,559,593	-813,345	-24%
Breakbulk (MT)	548,859	628,530	79,671	15%
Vehicles (Units)	100,952	81,343	-19,609	-19%
Total cargo (excl. Vehicles)	**19,978,804**	**16,656,467**	**-3,322,337**	**-17%**

Source: Calculated from TNPA, updated 19/11/2026.

Versus this time last year, the following movements occurred:

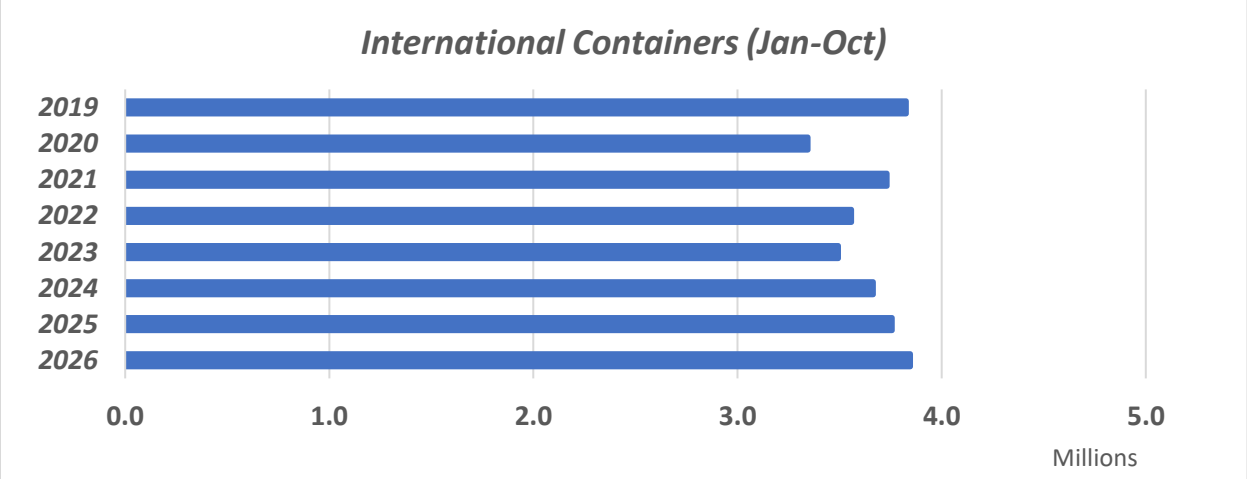
Table 6 – TNPA – Cyclical volume and growth: October 2019, 2025, and 2026

	2019	2025	2026	Growth: '19-'26	Growth: '25-'26
Containers (TEUs)	**387,616**	**329,164**	**297,470**	**-23%**	**-10%**
Landed	196,680	158,615	153,781	-22%	-3%
Shipped	190,936	170,549	143,689	-25%	-16%
Dry bulk (MT)	14,671,423	12,316,151	13,468,344	-8%	9%
Liquid bulk (MT)	3,841,437	2,665,558	2,559,593	-33%	-4%
Breakbulk (MT)	319,830	443,167	628,530	97%	42%
Vehicles (Units)	67,649	61,311	81,343	20%	33%
Total cargo (excl. Vehicles)	**18,832,690**	**15,424,876**	**16,656,467**	**-12%**	**8%**

Source: Calculated from TNPA, updated 19/11/2026.

Similar to *Figure 2*, the following table illustrates the year-to-date container throughput, which – despite the significant decrease for October – remains up by **↑2.4%** (y/y):

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



Source: Calculated from TNPA, updated 19/11/2026.

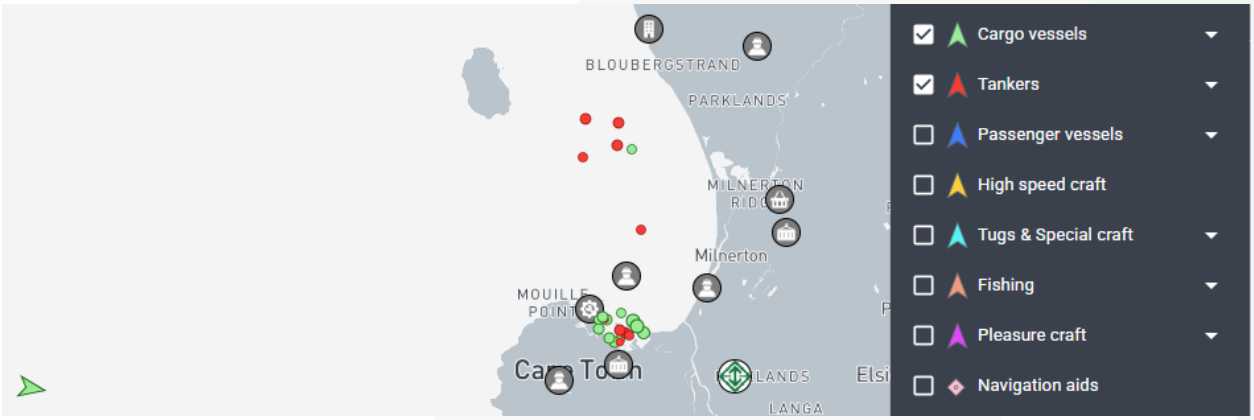
c. Summary of port operations

i. Cape Town

Cape Town Container Terminal reported a decline of 21% in waterside volumes, dropping to 62% of target volumes. This is the third consecutive week of decline, in part due to poor weather conditions that are anticipated to continue into the following week. In spite of a decline in volume, vessel turnaround time remained strong, with the average time at anchorage just over 1 hour, and only 29 hours spent at berth, on average. The terminal operated with an average of eight out of nine cranes and 30 of 32 RTGs throughout the week, with no vessels waiting at anchorage.

Cape Town Multi-Purpose Terminal showed a 12% decline in waterside volumes, moving only 34% of target volumes. Equipment availability remained steady with all three cranes in operation, and three out of five straddle carriers available throughout the week.

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



Source: Marine Traffic. Updated 15/11/2026 at 14:00.

ii. Durban

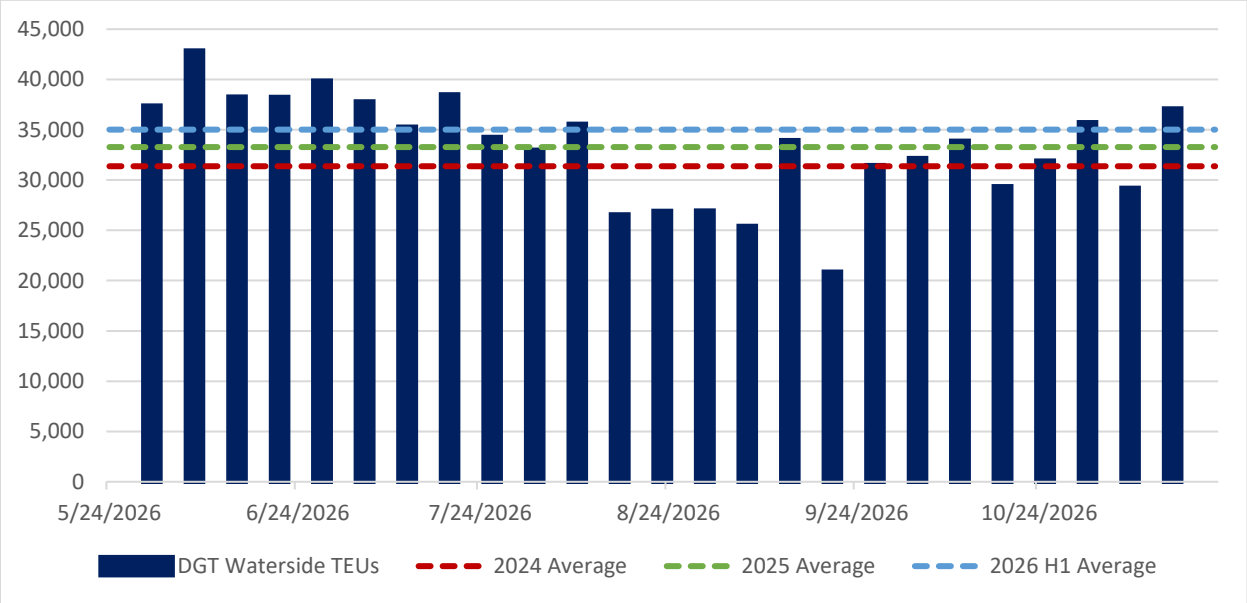
Pier 1 reported an increase of 10%, reaching 115% of the terminal's target volumes. Average time at anchorage increased from 73 to 100 hours, with vessels spending an average of 76 hours at berth, with an average of two vessels waiting at anchorage. The terminal operated with an average of five out of seven cranes and a full complement of 25 RTGs. Two vessels were at anchorage. The **TTT** for the week averaged **~46 minutes** (**↓6%**, w/w), and the average **staging time** was **~40 minutes** (**↑48%**).

Durban Gateway Terminal (DGT) recorded a strong improvement in waterside throughput, increasing by **↑28% to 36,332 TEUs**, the highest weekly level in approximately four months and an encouraging sign that higher operating rates remain achievable. However, this has **not yet translated into a commensurate reduction in the vessel backlog**. Average anchorage time deteriorated from **189 to 263 hours**, with around **13 vessels waiting offshore on average**; the daily queue only reduced from **14 vessels on 12 November to 11 on 19 November**.

Yard conditions also remain volatile: stack occupancy fell to **47.3% on 16 November** before rebounding to **70.6% on 18 November**, while road imports on hand subsequently rebuilt to **3,617 containers**. The week was therefore **operationally better, but recovery remains too slow**: the persistent vessel queue remains the principal constraint, and further omissions may be required as shipping lines protect schedule integrity.

Transnet issued a media statement on 18 November outlining **urgent measures to reduce the DGT backlog**, including **(1)** additional berthing capacity at Berth 102, **(2)** further vessel diversions to Ngqura, **(3)** increased Pier 1 crane availability, **(4)** additional rail evacuation to Gauteng and **(5)** prioritisation of essential cargo. Transnet also acknowledged that clearing the backlog will require sustained execution and coordinated action across DGT, TNPA, TFR, shipping lines and customers, which is consistent with the current evidence that the queue remains a system-wide problem rather than a terminal-only constraint.

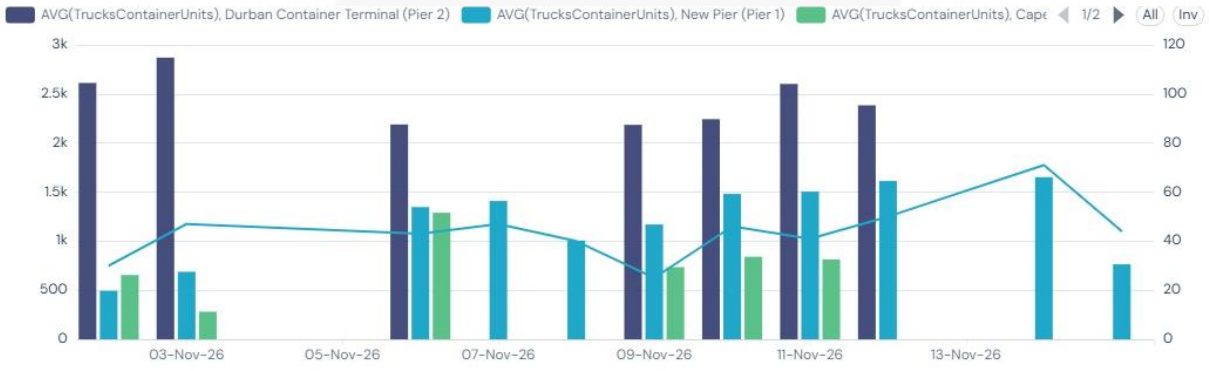
Figure 8 – DGT Weekly waterside throughput (TEU)



Source: Calculated from DGT

Durban Multi-Purpose Terminal reported a strong increase in waterside volumes at 81%, recovering to 123% of target volumes. Anchorage time remained elevated at 261 hours, and berth time was around 40 hours, with an average of four vessels waiting at anchorage. The terminal operated with an average of two out of four mobile harbour cranes.

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

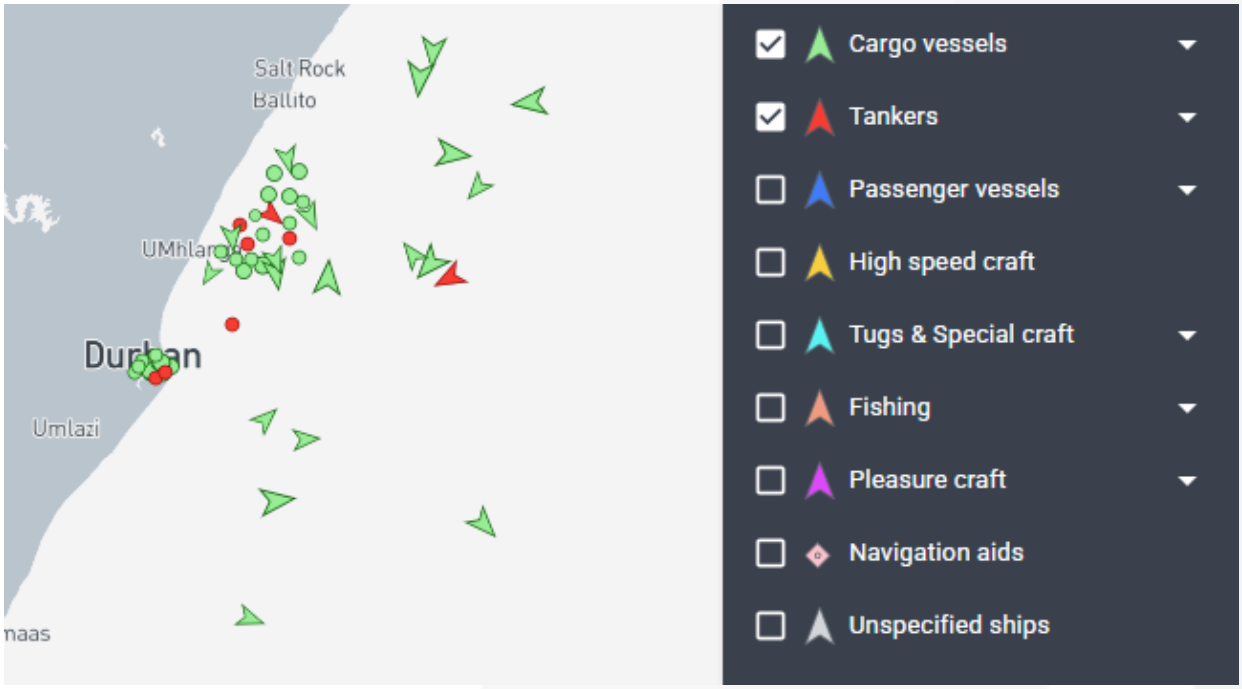


Source: Calculated using data from Transnet, 2026, and updated 15/11/2026.

The queue of container vessels waiting outside Durban **remained steady** this week at **37 vessels**. On Tuesday morning (17 November), **15** (**down** from 17 last week) container vessels were waiting outside at anchorage

for Durban, **ten** for DGT, **three** for Point and **three** for Pier 1. The queue of dry (**12**) increased, liquid (**five**) increased, and breakbulk (**three**) decreased:

Figure 10 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 15/11/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal reported a notable increase in waterside volumes at 59%, recovering to 129% of target volumes. Vessel turnaround times increased, with an average time at anchorage of 39 hours, up from 9 hours, and time at berth was around 46 hours. The terminal operated with an average of seven out of eight cranes and 25 of 30 RTGs throughout the week. Strong winds and high swells are anticipated for the coming week.

Port Elizabeth Container Terminal showed a significant increase of 211% in waterside volumes, recovering to 73% of target recovering from a slow week the previous reporting period. Average time at anchorage was 22 hours and similarly, time at berth was around 22 hours. The terminal operated with a full complement of cranes and straddle carriers throughout the week. As with NCT, 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 **220,000 tons** (**↑29%**, 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 (*9 to 15 November)*, rail cargo on the ConCor line out of Durban was reported at **1,514** containers, down by **↓37%** from the previous week's **2,021** containers.

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



Source: Calculated using data from Transnet, 2025. Updated 15/11/2026.

2. Air Cargo Update

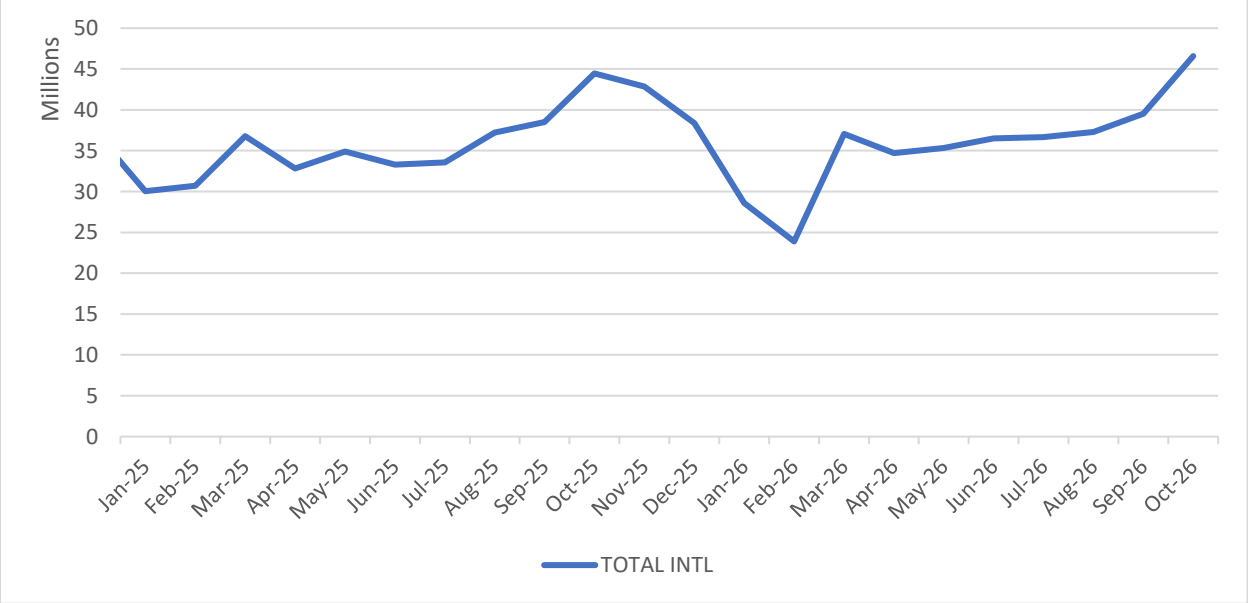
a. International air cargo

For the full month of October, a record increase was collectively witnessed – driven by ORTIA volumes – with Cape Town and Durban also registering high volumes:

- Johannesburg increased by **↑12%** (m/m) versus September and is up by **↑3%** (y/y) versus the same time last year.
- Cape Town increased by **↑36%** (m/m) and is up by **↑11%** (y/y) versus 2025.
- Durban increased by **↑18%** (m/m) but is down by **↓4%** (y/y).
- Consequently, total international air cargo for October 2026 is up by **↑18%** (m/m) to a record of **46.6 million kg** – and up by **↑5%** versus 2025.

The following figure shows the international air cargo flows to and from all terminals since the start of 2024:

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



Calculated from ACOC. Updated: 15/11/2026.

Jet fuel stock improved in the last week and is currently stable. The latest reported fuel stock days (as of Thursday morning, 19 November) per airport indicate:

- ORTIA: **10.8 days** (target: 5 days)
- CTIA: **2.7 days** (target: 4 days)
- Durban: **13.8 days** (target: 5 days)

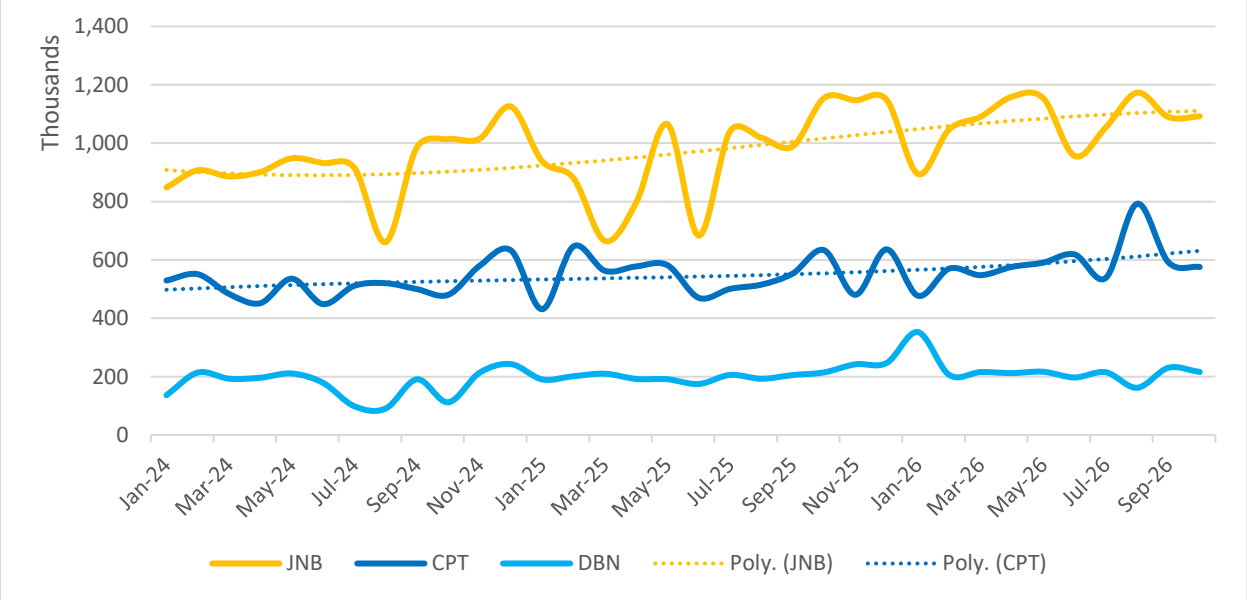
b. Domestic air cargo

For October, domestic volumes handled at our three main terminals were stable, but were down versus the same time last year:

- Johannesburg increased by **↑0.2%** (m/m) versus September – but is down by **↓5%** (y/y) versus 2025.
- Cape Town decreased by **↓3%** (m/m) and by **↓9%** (y/y) versus 2025.
- Durban decreased by **↓6%** (m/m) and is up by **↑1%** (y/y) versus 2025.
- Consequently, total monthly domestic air cargo for October is down by **↓1%** (m/m) and is down by **↓6%** (y/y) versus 2025.

The following figure shows the movement since the start of 2024:

Figure 13 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 15/11/2026.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*9 to 15 November)*, movements decreased significantly – by around **76 trucks a day**, as trains from KM4 to Maputo also decreased (to an average of **1 train per day**).

- Truck volumes through the border post decreased to **1,416 HGVs per day** (**↓5%**, w/w).
- Overall, queue times **increased slightly** to an average of **~5 hours** (**↑6%**) at the border.
- The average processing times **were similar** at an average of **~5 hours** (**↑21%**) per crossing.

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

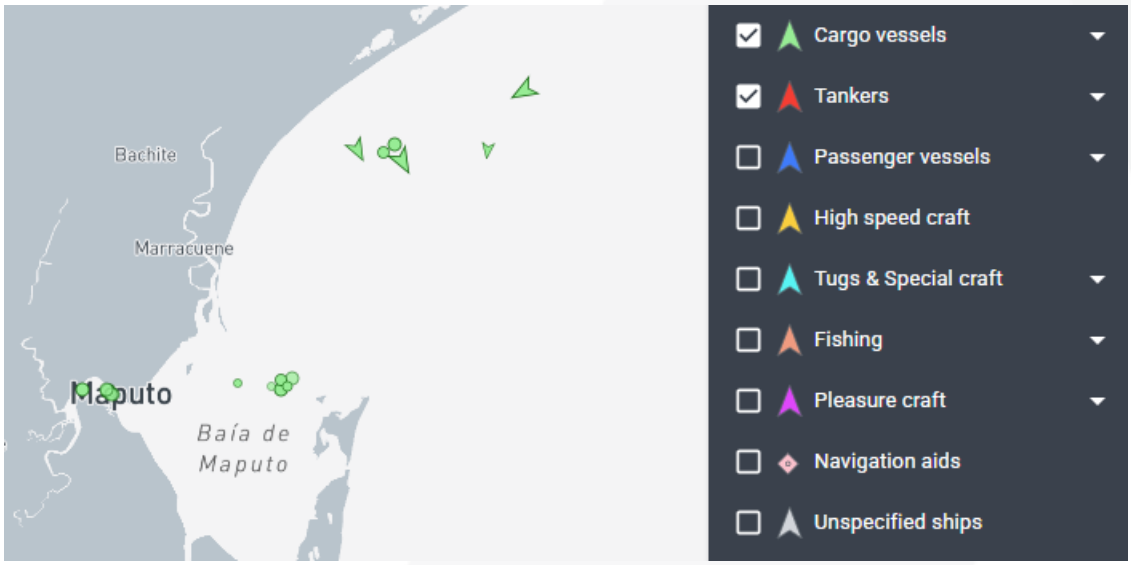
Table 7 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,416	1,396	1,000	171	38	86	73	335
% (w/w)	**-5%**	**-2%**	**-17%**	**6%**	**2%**	**18%**	**34%**	**16%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 15/11/2026.

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

Figure 14 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 15/11/2026 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 **were stable**.
- The median border crossing times at South African borders **increased** by **an hour**, averaging **~9.7 hrs** (**↑12%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) **was stable** – averaging **~6.2 hrs** (**↓2%**).

1. **South Africa/Botswana – Kopfontein and Skilpadshek Power Disruptions:**
    a. Kopfontein experienced electricity supply disruptions on **7 November**, compounded by technical difficulties affecting backup generators, temporarily interrupting border operations.
    b. Transporters were redirected to **Skilpadshek** and **Ramatlabama**, with power reportedly restored at Kopfontein by 22:30 that evening.
    c. Skilpadshek subsequently experienced separate electrical difficulties, with supply reportedly restored shortly after 22:00, reinforcing concerns over infrastructure reliability at key border crossings.

2. **DRC/Zambia – Kanyaka Congestion and Mining Export Restrictions:**
    a. Transporters reported a **30 km northbound truck queue towards Kanyaka** on 9 November, highlighting persistent congestion along the Copperbelt corridor.
    b. The Congolese Control Office reportedly issued a service notice limiting loads of marketable mining products intended for export to **30 tonnes per road vehicle** and **50 tonnes per railway wagon**, subject to tolerances of **1.5 tonnes** and **2 tonnes**, respectively.
    c. The reported requirements could affect payload optimisation and transport costs, particularly for mineral exporters, although the notice's implementation and enforcement arrangements require confirmation.
3. **South Africa/Eswatini – Oshoek Border Power Failure:**
    a. Oshoek reportedly experienced a prolonged electricity outage on **9 November**, lasting more than **15 hours**.
    b. Transporters were advised to anticipate border processing delays, highlighting the vulnerability of customs and immigration operations to interruptions in essential infrastructure.
4. **South Africa/Botswana – Groblersbrug Traffic Diversions:**
    a. Groblersbrug experienced increased southbound traffic on Wednesday, 11 November, following interruptions to operations at Kopfontein.
    b. The diversion placed additional pressure on alternative border infrastructure, illustrating how operational disruptions at one crossing can transfer congestion elsewhere in the network.
5. **South Africa – SARS Digital Systems and Microsoft Service Disruptions:**
    a. SARS confirmed that the **global Microsoft 365 outage on 13 November** affected access to certain digital services, introducing potential administrative disruptions for traders and clearing agents.
    b. Separately, SARS scheduled digital-platform maintenance between **13 and 15 November**, warning of possible intermittent interruptions to its tax and customs systems.
    c. Although the Microsoft outage was confirmed, its direct impact on customs processing times and border throughput has not been quantified.
6. **Botswana/Zambia – Kazungula Border Management Improvements:**
    a. Botswana's Assistant Minister of Transport and Infrastructure reported on 13 November that incomplete documentation, limited pre-clearance uptake, staff shortages and unreliable customs networks remained principal causes of congestion at the Kazungula One Stop Border Post.
    b. The Kazungula Bridge Authority has introduced a **mobile-based Traffic Monitoring and Client Feedback System**, using QR technology to monitor truck queues, waiting times, clearance status and operational bottlenecks.
    c. According to the Minister, these interventions have contributed to reducing truck queues to **less than one kilometre**. At the same time, a proposed **$260 million Kazungula Logistics Park** would provide longer-term staging capacity. The crossing currently handles approximately **640 trucks daily**.

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

Table 8 – Delays[8] summary – South African borders[9] (both directions)

Border Post	Direction	HGV[10] 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	592	17.4	5.1	17.2	17,760	4,144
Beitbridge	Zimbabwe-SA	569	4.4	1.3	4.2	17,070	3,983
Groblersbrug	SA-Botswana	219	14.6	1.5	14.4	6,570	1,533
Martin's Drift	Botswana-SA	177	5.3	1.1	5.2	5,310	1,239
Kopfontein	SA-Botswana	225	8.4	2.5	8.3	6,750	1,575
Tlokweng	Botswana-SA	38	0.8	0.2	0.5	1,140	266
Vioolsdrift	SA-Namibia	30	4.8	1.5	4.5	900	210
Noordoewer	Namibia-SA	20	2.0	0.4	2.0	600	140
Nakop	SA-Namibia	30	4.4	1.1	4.3	900	210
Ariamsvlei	Namibia-SA	20	1.2	0.4	1.1	600	140
Skilpadshek	SA-Botswana	309	19.9	3.0	19.6	9,270	2,163
Pioneer Gate	Botswana-SA	78	2.1	1.2	2.0	2,340	546
Ramatlabama	SA-Botswana	219	4.9	2.0	4.5	6,570	1,533
Ramatlabama	Botswana-SA	111	0.5	0.1	0.3	3,330	777
Lebombo	SA-Mozambique	1,438	5.0	2.3	5.0	43,140	10,066
Ressano Garcia	Mozambique-SA	1,380	2.2	0.3	2.1	41,400	9,660
Sum/Average		**5,455**	**6.1**	**1.5**	**5.9**	**163,650**	**38,185**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 08/11/2026.

Table 9 – Delays summary – Corridor perspective

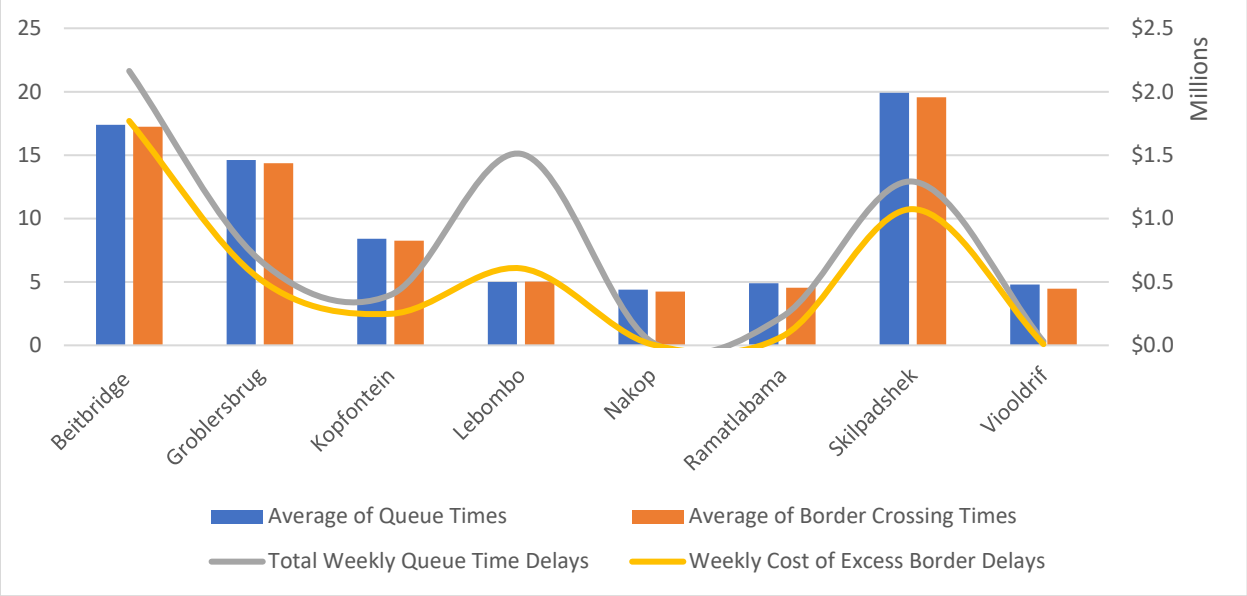
Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	7.1	2.1	6.8	9,600	2,240
Central Corridor	798	1.7	0.5	2.2	23,940	5,586
Dar Es Salaam Corridor	1,819	15.3	1.3	15.2	54,570	12,733
Maputo Corridor	2,818	3.6	1.3	3.6	84,540	19,726
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,682	13.9	1.8	13.7	110,460	25,774
Northern Corridor	2,817	1.1	0.4	1.2	92,520	21,588
WBNLD Corridor	1,010	5.1	1.2	4.9	30,300	7,070
Trans Cunene Corridor	100	3.1	0.8	3.0	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	21.0	4.3	20.7	3,480	812
Sum/Average	**13,707**	**6.6**	**1.1**	**6.6**	**419,220**	**97,818**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 08/11/2026.

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

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

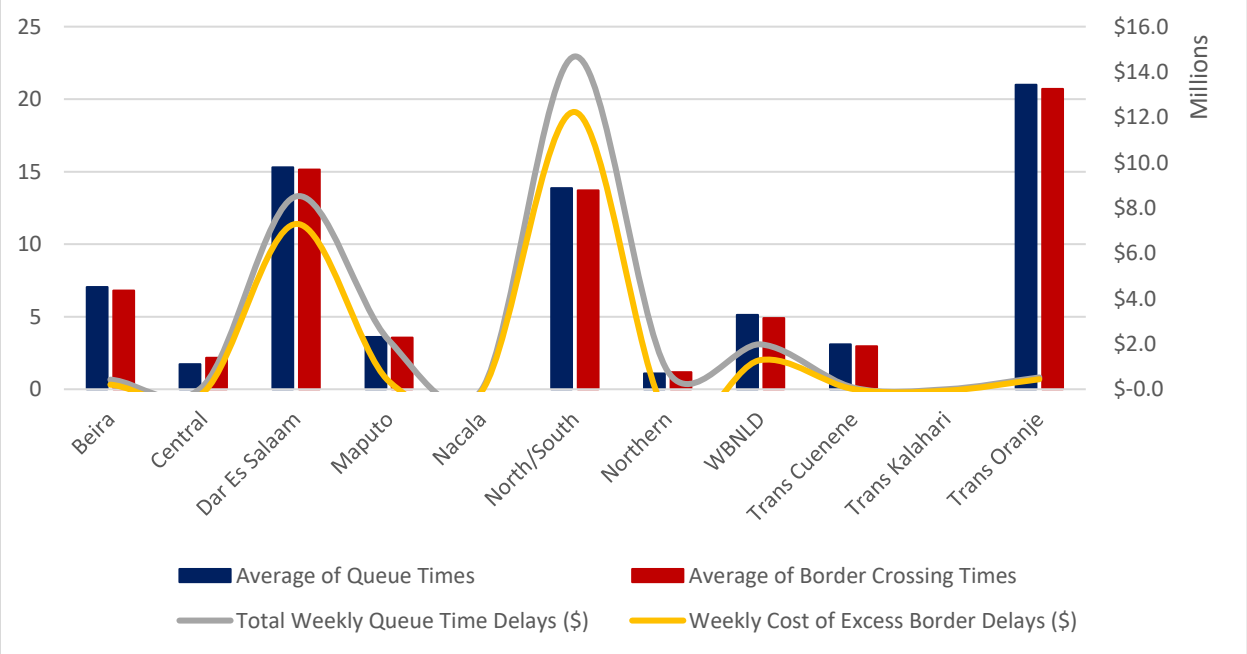
Figure 15 – Weekly cross-border delays & estimated cost[11] from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 08/11/2026.

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

Figure 16 – Weekly cross-border delays & estimated cost from a corridor perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay, week ending 08/11/2026.

[11] From this reporting period, the assumed indirect cost of cross-border truck delays has been revised from **$20 to $30 per truck-hour** (**↑50%**), reflecting updated industry cost assumptions. This adjustment represents a change in the estimation methodology rather than an observed increase in actual costs. Consequently, historical cost comparisons are not directly comparable unless recalculated using the revised assumption.

In summary, cross-border queue time averaged **~6.6 hours** (up by **~0.4 hours** from the previous week's **~6.2 hours**), indirectly costing the transport industry an estimated **$29.3 million** (**R497 million**). Furthermore, the week's average cross-border transit times also hovered around **~6.6 hours** (**unchanged** from the previous week's **~6.6 hours**), at an indirect cost to the transport industry of **$20.3 million** (**R345 million**). The total indirect cost for the week amounts to an estimated **~$49.6 million** (**R842 million**, up by **↑30%** from the **~R655 million** in the previous report – mainly because of the methodological adjustment – see the footnote below).

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.

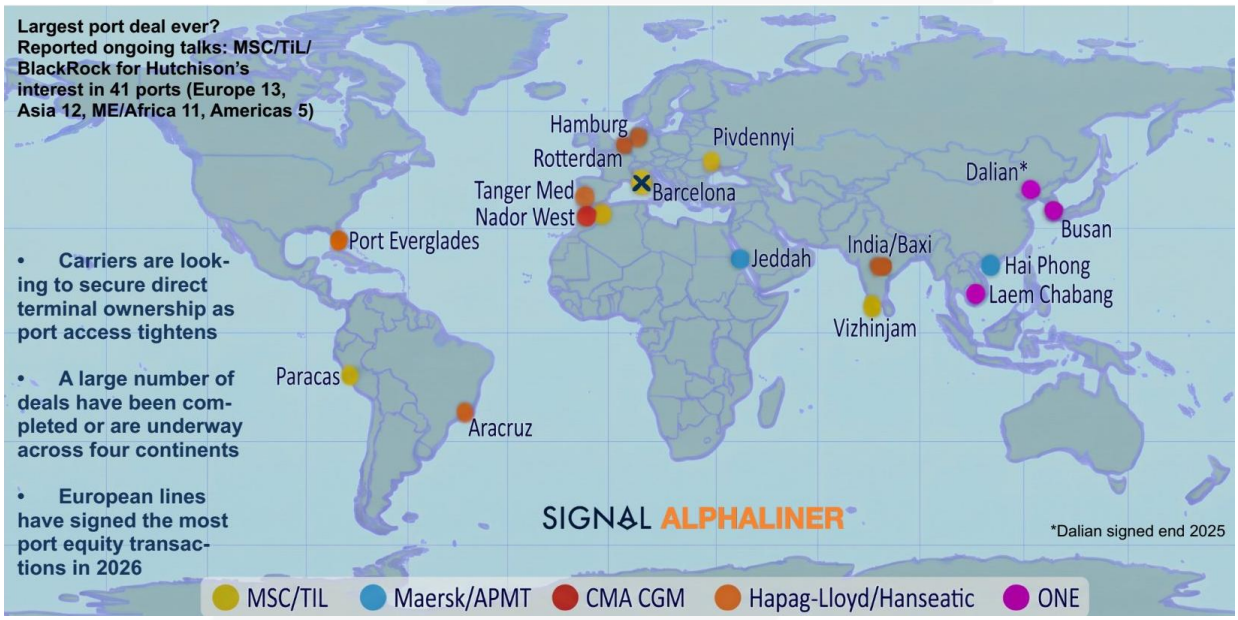
a. Global shipping industry

i. Vertical integration: Shipping lines and terminal operations

Container shipping lines are accelerating vertical integration through direct investments in port infrastructure, with *Alphaliner* identifying **more than 15 completed or pending terminal equity transactions** involving leading carriers during the first ten months of 2026. Investments span **four continents**, led by European carriers seeking to secure terminal access amid rapid fleet expansion and comparatively limited port infrastructure investment.

MSC, through Terminal Investment Limited (TiL), has acquired interests in Peru (**100%** at Paracas), Morocco (**50%** at Nador West Med) and Ukraine (**51%** at Pivdennyi). Meanwhile, ongoing negotiations involving MSC/TiL and BlackRock for Hutchison's interests in **41 ports worldwide** could represent one of the industry's largest infrastructure transactions.

Figure 17 – Carrier terminal equity investment projects in 2026 (completed and under negotiation)



Source: Alphaliner

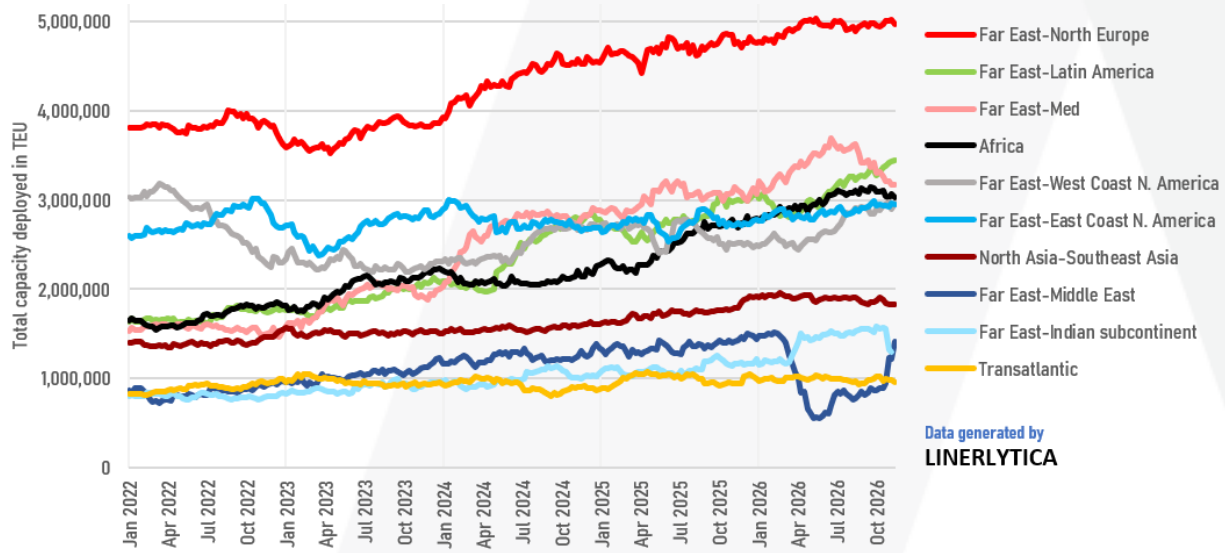
Supported by substantial accumulated profits, carriers are increasingly extending their control beyond vessels into terminals, rail networks and logistics hubs. This trend highlights the growing strategic importance of port infrastructure, while raising potential concerns over market concentration, competition

and equitable terminal access. And the integration is not only through mergers and acquisitions. MSC is expanding its Asyaport transhipment hub in Türkiye from **2.75 million to 4 million TEU** in annual handling capacity by the end of 2026, with further expansion plans potentially increasing capacity to **6 million TEU**, reinforcing the carrier's control over strategic port infrastructure and regional transhipment networks.[12]

ii. Carrier capacity deployment

According to *Linerlytica*, carrier deployment on Far East–Middle East routes has rebounded sharply since October, absorbing surplus vessel capacity despite the gradual return to the Suez Canal, which has released more than **500,000 TEU** of effective capacity since June. MSC has redeployed **24,000-TEU vessels** to the Arabian Sea and **16,000-TEU vessels** to the Red Sea, attracted by elevated regional freight rates. Meanwhile, the Gemini Cooperation (Maersk and Hapag-Lloyd) has confirmed plans to resume Suez transits across its Asia–Europe services from December–January. However, this concentration of capacity is intensifying congestion, with vessels awaiting berths across the Middle East and Indian subcontinent exceeding a record **500,000 TEU**.

Figure 18 – Capacity deployment by trade (2022-2026)



Source: Linerlytica

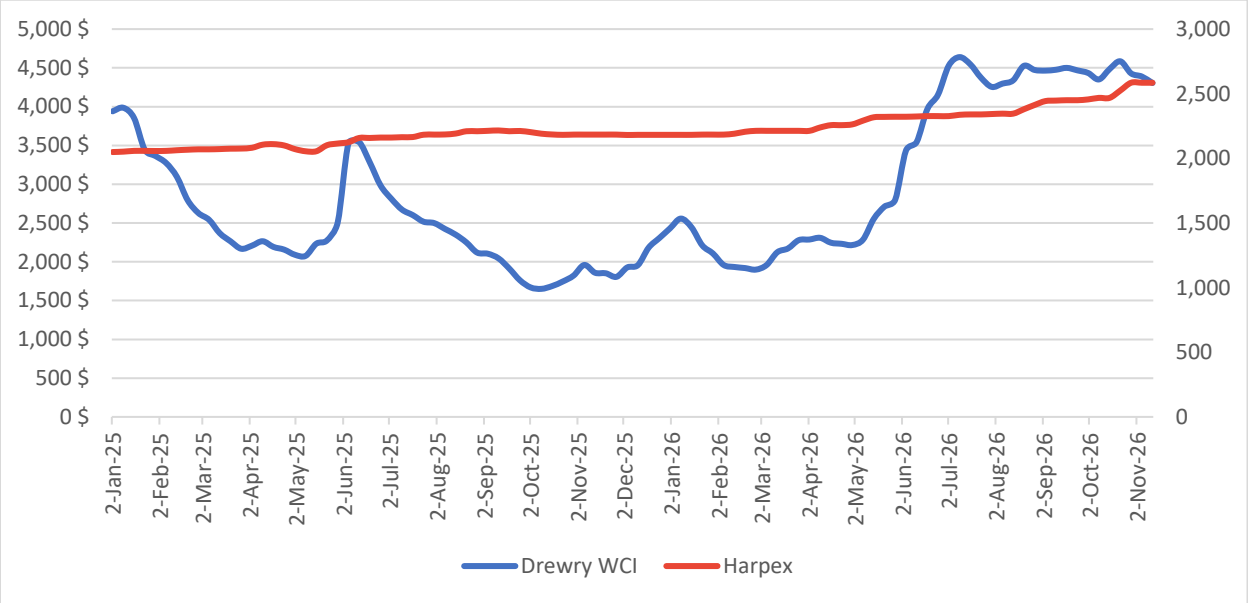
Africa's expansion is interesting. The *Linerlytica* chart shows a substantial expansion in deployed capacity on the **Far East–West Africa trade**, nearly doubling since 2022 to approximately **3 million TEU**. However, deployment has moderated from its recent peak in 2026.

iii. Container freight rates

Drewry's World Container Index declined by **↓2%** (w/w) to **$4,305/FEU** on 12 November, with Shanghai–New York rates falling **↓3%** to **$9,020/FEU** and Shanghai–Rotterdam declining **↓3%** to **$3,504/FEU**. The SCFI subsequently decreased by **↓1.68%** to **3,572.33 points** on 13 November, as carriers continued using blank sailings and proposed rate increases to counter weaker demand and growing effective capacity. In the charter market, the *Harpex Index* remained stable last week and stood at **2,585 points** on 13 November.

[12] Van Marle, G. 18/11/2026. MSC plans to triple capacity at its Aysaport transhipment hub.

Figure 19 – World Container Index (WCI) and Harper-Petersen Index (Harpex)



Source: Calculated from Drewry and Harpex

iv. Global ocean shipping developments

The following key developments are worth noting:

1. **Global port congestion – More than 10% of the fleet constrained:**
    a. DHL Global Forwarding estimates that **more than 3.6 million TEU**, equivalent to **over 10% of the global containership fleet**, remains tied up in port congestion.[13]
    b. Although congestion is beginning to ease in parts of Asia, the accumulated disruption could take months to normalise, while infrastructure and hinterland constraints will remain significant into 2027.
2. **Container schedule reliability – Fewer than half of sailings on time:**
    a. Kuehne+Nagel's latest *seaexplorer* analysis reports that global container schedule reliability declined from **51.6% in September to 48.3% in October**, indicating that more than half of scheduled services failed to arrive on time.[14]
    b. This reinforces the argument we've often presented that vessel deployment and nominal capacity alone are insufficient indicators of service quality, particularly where congestion, vessel bunching and missed connections continue affecting end-to-end predictability.
3. **European ports – Renewed industrial action**
    a. French dockworkers called a **24-hour nationwide stoppage on 17 November**, affecting major maritime gateways including Le Havre and Marseille-Fos.
    b. The industrial action added to existing weather-related disruption, high yard utilisation and vessel-bunching pressures across Northern Europe, potentially worsening schedule

[13] DHL. 11/2026. Ocean Freight Market Update.
[14] Radunzel, P. 16/11/2026. seaexplorer Schedule Reliability Report – October 2026.

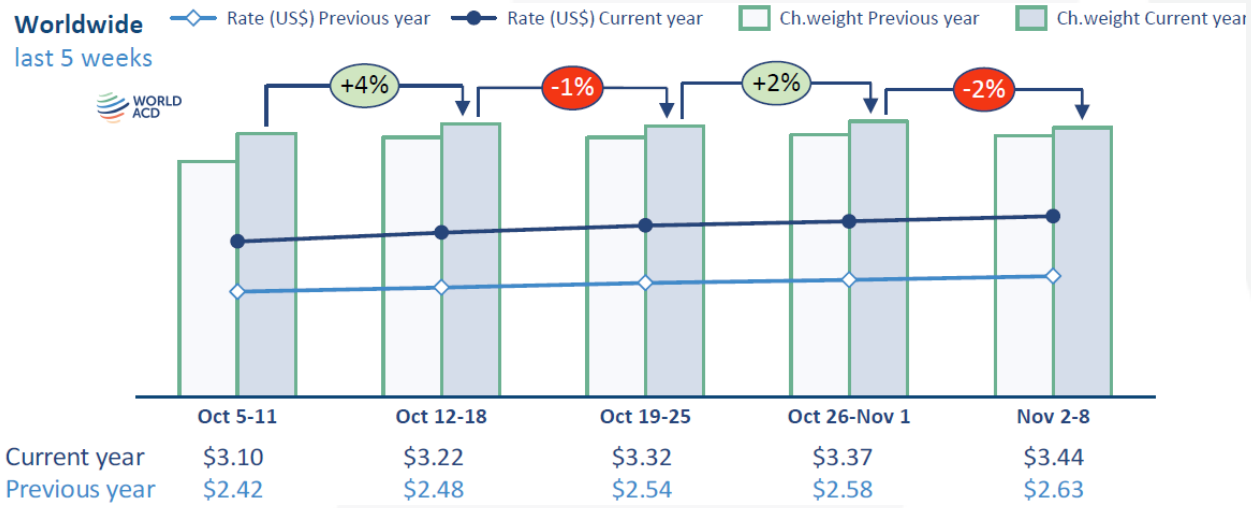
reliability and inland cargo evacuation; the precise throughput losses remain unquantified.

4. **Black Sea – Escalating maritime security threats:**
    a. Maritime security risks increased in the Black Sea following the sinking of a bulk cargo vessel carrying wheat off Bulgaria on 16 November, followed by the loss of an LPG tanker after reported projectile strikes on 17 November.
    b. *Reuters* reports that at least 17 vessels have been attacked off Bulgaria and Romania since mid-July, raising concerns over vessel safety, insurance exposure and the continuity of regional maritime trade. However, these latest incidents did not involve containerships.[15]

b. Global air cargo industry

Global air cargo pricing continued to strengthen in Week 45, despite softening demand, according to WorldACD. Worldwide chargeable weight declined by **↓2%** (w/w), while capacity remained broadly unchanged and average full-market rates increased by **↑2% to $3.45/kg (↑31%, y/y)**. Rate increases were strongest from Africa (**↑7%**, w/w) and Asia Pacific (**↑3%**). (In fact, transatlantic airfreight rates were at their highest level for four years, according to Freightos.[16])

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



Source: WorldACD

Regional divergence persisted, with Asia Pacific–US volumes increasing by **↑13%** (y/y), driven particularly by Taiwan (**↑37%**) and AI-related shipments. Conversely, China–Europe volumes declined by **↓13%** (y/y), while Hong Kong–Europe traffic remained **↓32%** lower following changes to EU import regulations. Asia Pacific freight rates to the US increased by **↑44%** (y/y), compared with **↑26%** to Europe. Meanwhile, ongoing hostilities severely affected Saudi Arabian air cargo, with tonnage **↓33%** relative to Week 40. Overall, elevated rates reflect constrained effective capacity and regional imbalances rather than a broad-based peak-season demand surge.

[15] Reuters. 18/11/2026. LPG tanker that sank off Bulgaria on Tuesday was hit by projectiles, official says.
[16] Goldstone, C. 18/11/2026. Transatlantic airfreight rates at highest level for four years.

ENDS[17]

[17]***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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