SAVINO DEL BENE®
Global Logistics and Forwarding Company

CARGO MOVEMENT UPDATE

Date: 23 August 2026

Key Notes

- An average of **12,062 TEUs** was handled per day, with **11,924 TEUs** projected for next week.
- **DGT latest**: Stack occupancy: **89.2%** → **73.8%** (d/d); Road imports on hand: **6,171 → 5,750**.
- Rail cargo handled out of Durban was reported at **781** containers, down by **↓64%** from last week.
- Cross-border queue: **↓0.1 hrs**; transit: **no change**; SA borders: **~9.6 hrs** (**↑6%**); SADC: **~6.4 hrs** (**no change**).
- Global **port congestion has reached a new high**, with more than **4.3 million TEUs** waiting to berth.
- Global air cargo fell another **↓5%** (w/w), following the **↓2%** decline last week; but remains up **↑3%**(y/y).

i. Port operations - General

- At our container terminals, an average of **12,062 TEUs** was handled daily, an increase from **11,924 TEUs** the previous week.
- Port operations in Durban remained under considerable pressure, particularly at DGT, where vessel delays remained elevated, and some vessels spent more than 10 days at anchorage.
  - The terminal has deliberately prioritised landside evacuation and yard fluidity during the recovery process, which has constrained waterside productivity in the short term.
  - Encouragingly, more recent indicators suggest that conditions are beginning to improve, with overall stack occupancy declining from **89.2% to 73.8%** between 25 and 27 August, although reefer capacity remains heavily constrained.
  - The wider disruption continues to affect vessel schedules, with Maersk confirming three vessels being rerouted, while the ConCor rail shutdown from 25 August to 3 September will add further landside pressure.
  - Pier 1 performed strongly despite limited crane availability and continues to assist the wider Durban recovery effort.
  - Elsewhere, container operations were generally positive: CTCT remained comfortably above target despite weather and systems delays, while both Ngqura and Port Elizabeth exceeded target, with Port Elizabeth continuing its recent strong performance.

ii. Post operations – Performance Metrics

- CTCT handled an average of **~2,156 TEUs** (**↓1%**, w/w) a day, with a projected average of **~2,009 TEUs** (**↓7%**) next week.
  - Vessel turnaround times increased (from near zero) to 29 hours at anchorage, while time at berth remained steady at 39 hours.
  - The strong performance was supported by consistent equipment availability, with an average of eight out of nine cranes and 30 out of 32 RTGs available across the week.
  - This strong week came in spite of poor weather conditions early in the week.
- Pier 1 handled an average of **~2,367 TEUs** (**↑16%**, w/w) a day, with a projected average of **~2,011 TEUs** (**↓15%**) next week.
  - Pier 1 reported an increase in waterside volumes, reaching volumes 12% above the planned volume, a notable recovery from the previous week, with the potential for a further increase in the coming week, as Pier 1 can alleviate some of the congestion at DGT.
  - As congestion continues at the port of Durban, the terminal reported a significant increase in time spent at anchorage from 39 hours the previous week, though time at berth has gone down to 49 hours, as Pier 1 continues to work towards clearing congestion.

  - The **TTT** for the week averaged **~47 minutes** (**↓2%**, w/w), and the average **staging time** was **~38 minutes** (**↑41%**).
- DGT handled an average of **~3,737 TEUs** (**↑1%**, w/w) a day, with a projected average of **~5,571 TEUs** (**↑49%**) next week.
  - Encouragingly, **DGT is showing tangible signs of recovery**, following the severe operational disruption experienced over recent weeks.
  - DGT reports that the NAVIS N4 system is stable, while the immediate focus has shifted to clearing the accumulated backlog, improving equipment availability and restoring fluidity between waterside operations, the yard and landside evacuation.
  - The latest data provide some grounds for cautious optimism. **Overall stack occupancy declined from 89.2% on 25 August to 73.8% on 27 August**, a substantial improvement in yard density, while road-import containers on hand fell from **6,171 to 5,750** over the same period.
  - In the latest 24-hour reporting period, DGT completed **1,811 gate moves**, including **1,405 import movements**, reflecting the deliberate emphasis on evacuating imports and creating capacity within the terminal.
  - Four vessels were working alongside on Thursday morning, although **nine vessels remained at anchorage**.
  - The principal pressure point remains the reefer operation, where stack occupancy was still elevated at **110%**, highlighting that recovery remains uneven, and that continued discipline will be required before the terminal returns to sustainable fluidity.
- The queue of container vessels waiting outside Durban **was consistent** this week.
  - On Wednesday morning (26 August), **ten** container vessels were waiting outside at anchorage for Durban, **seven** for DGT, **two** for Pier 1, and **one** for Point.
  - The queue of dry (**seven**), liquid (**four**), and breakbulk (**one**) vessels **was stable** from last week.
- South Africa's other container terminals produced the following projected results for the week:
  - Ngqura Container Terminal handled an average of **~2,277 TEUs** (**↓5%**, w/w) a day, with a projected average of **1,890 TEUs** (**↓17%**) next week.
  - Port Elizabeth Container Terminal handled an average of **~726 TEUs** (**↑11%**) a day, with a projected average of **~375 TEUs** (**↓48%**) next week.
  - Other terminals handled a combined average of **~798 TEUs** (**↓18%**, w/w), with a projected average of **~842 TEUs** (**↑5%**) next week.
- At RBCT, the daily average coal throughput for the week **increased considerably, nearly double from last week** and averaged close to **195,000 tons** (**↑95%**, w/w) a day.
  - With an average of **17 trains per day** being serviced, below the target of 22.
- In the last week (*17 to 23 August*), rail cargo on the ConCor line out of Durban was reported at **781** containers, down by **↑64%** from the previous week's **2,161** containers.
  - This significant increase is mostly attributed to DGT not sharing volume data for the reporting period.
  - Pier 1's week-on-week performance showed an 11% increase.
  - A decline in volumes for the coming weeks is anticipated as the ConCor line shuts

iii. Lebombo border post update

In the last week (*17 to 23 August)*, movements decreased considerably – by around **270 trucks a day**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**).

- Truck volumes through the border post decreased to **1,260 HGVs per day** (**↓20%**, w/w).

- Overall, queue times **decreased slightly** to an average of **~4.2 hours** (**↓5%**) at the border.
- The average processing times **increased slightly** to an average of **~4.3 hours** (**↑2%**) per crossing.

iv. SADC cross-border road freight update

- Overall, the average queue time decreased by around **10 Minutes** from last week, as transit times **were mostly stable**.
- The median border crossing times at South African borders increased by **half an hour**, averaging **~9.6 hrs** (**↑6%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) was broadly stable, averaging **~6.4 hrs** (**no change**).

1. **Zambia – new Kabwe toll gate:**
    a. A new toll gate at Kabwe became operational on 22 August, with heavy vehicles reportedly charged K820 per single trip.
    b. The toll is payable each time the route is used, adding a further cost consideration for operators using the corridor.
2. **N1 corridor – truck incident near Louis Trichardt:**
    a. On 16 August, a truck transporting steel coils lost part of its load near Louis Trichardt en route to Musina, temporarily affecting the corridor.
    b. The obstruction was cleared later the same day.
3. **Kazungula – customs/documentation intervention:**
    a. On Sunday, three drivers were temporarily stopped at Kazungula after officials questioned their documentation and duties already paid and sought to impose an additional penalty.
    b. The matter was resolved following intervention, with the drivers released approximately one hour later.

- In summary, cross-border queue time averaged **~6.8 hours** (down by **~0.1 hours** from the previous week's **~6.9 hours**), indirectly costing the transport industry an estimated **$19.6 million** (**R314 million**). Furthermore, the week's average cross-border transit times hovered around **~6.7 hours** (no change from the **~6.7 hours** recorded in the previous report), at an indirect cost to the transport industry of **$13.3 million** (**R214 million**). The total indirect cost for the week amounts to an estimated **~$32.9 million** (**R526 million**, down by **↓10%** from the **~R589 million** in the previous report).

v. Shipping industry

- Global container shipping remained under significant pressure this week, with **port congestion reaching a new high of more than 4.3 million TEUs waiting to berth**, exceeding the previous absolute peak recorded in 2022, although the affected share of the global fleet remains lower at **12.6%**.
- Weather-related disruption across East Asia remains the principal driver, while congestion is also building at the Panama Canal ahead of planned capacity reductions in September.
- At the same time, selected carriers continued a cautious return to the **Suez–Red Sea corridor**, with Maersk recording 11 transits and CMA CGM 15 last week, although most major Asian carriers continue to avoid the route.
- Global port rankings also shifted materially in H1 2026, with Jebel Ali falling from 10th to 32nd after volumes more than halved, while several major Asian ports continued to record strong growth.

vi. International air cargo: South Africa

- International inbound air cargo to ORTIA dropped significantly this week – but was offset by a substantial increase in outbound cargo.

- The daily average amounted to **~561,000 kg** inbound (**↓7%**, w/w) and **~416,000 kg** outbound (**↑16%**).
- Current volumes to and from ORTIA remain slightly above the commensurate volumes of August last year (**↑4%**) – and approximately similar to the pre-pandemic August of 2019 (**↓0.5%**).

The latest reported fuel stock days (as of Thursday morning, 27 August) per airport indicate:

- ORTIA: **6.3 days** (target: 5 days)
- CTIA: **4.3 days** (target: 4 days)
- Durban: **12.4 days** (target: 5 days)
- Despite sufficient stocks for now, **South Africa faces a potential jet-fuel shortage following Natref refinery disruptions and constrained international supply, prompting airlines and authorities to implement contingency measures.**

vii. International air industry

- Global air cargo demand weakened further in week 33, with chargeable weight falling **↓5%** (w/w), although volumes remained **3% above last year**.
  - Rates nevertheless held broadly steady at **$2.97**, supported by reduced capacity and higher fuel costs, while Asia-Pacific traffic continued to show a pronounced divergence between resilient US-bound demand and weakening European flows.