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Cargo Movement Update #301[1]

Date: 27 September 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)	38,618	43,996	**82,614**	34,047	38,790	**72,837**	↑13%
Air Cargo (tons)	4,135	4,384	**8,518**	4,414	3,198	**7,613**	↑12%

Monthly Snapshot

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

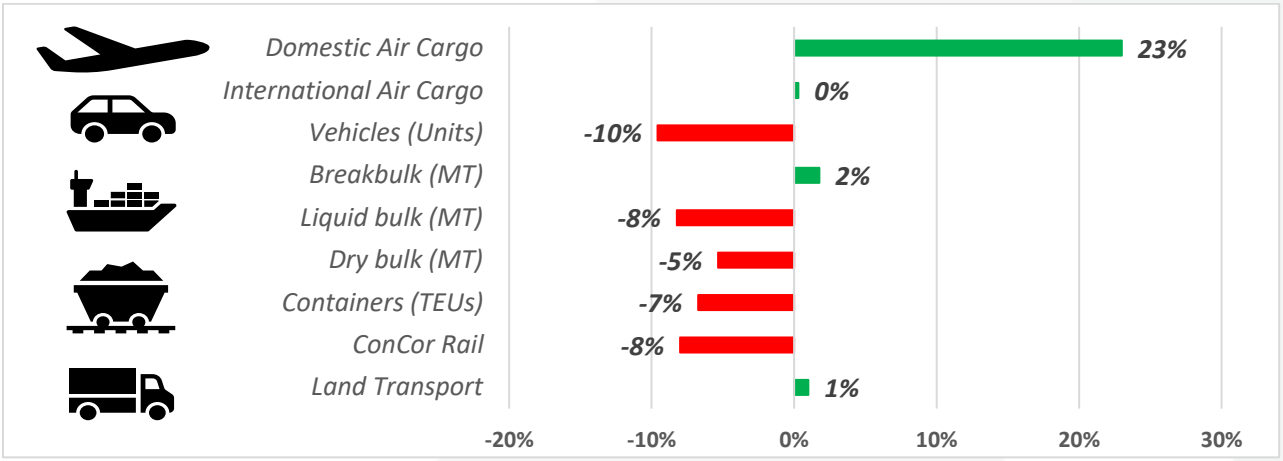
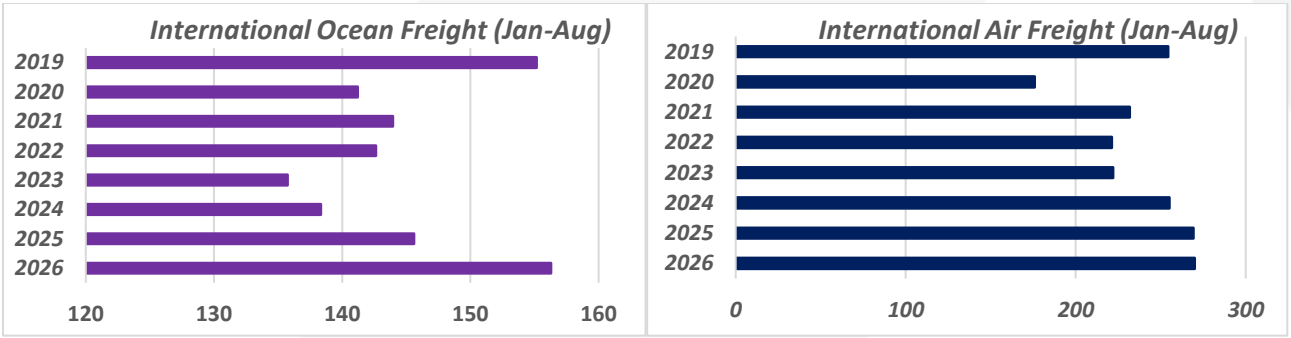


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **11,802 TEUs** was handled per day, with **12.395 TEUs** projected for next week.
- **DGT latest**: **~4,388 TEUs/day** (**↑53%**, w/w). Reefer pressure **↓**, vessel queues **↑**, **18-21 days** SC delay.
- Rail cargo handled out of Durban was reported at **2,426** containers, up by **↑36%** versus last week.
- Cross-border queue: **↑0.4 hrs**; transit: **↑0.4 hrs**; SA borders: **~9.5 hrs** (**↑9%**); SADC: **~8.2 hrs** (**↑4%**).
- Schedule reliability fell **↓5.9%** to **49.9%** in Aug., ave. delays for late arrivals: **6.8 days** – highest since Mar. '22.
- IATA's August data show demand (CTKs) rising **↑4.4%** (y/y), with capacity **↓0.1%**; jet fuel: **↑79.2%** (y/y).

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *301st* 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: August vs. August.
[5] Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **11,802 TEUs** was handled daily, an increase from **10,405 TEUs** the previous week.

DGT update: Port operations in Durban improved materially this week, with both Pier 1 and **DGT** recording notable increases in waterside volumes. At DGT, throughput rose by **53% (w/w)** to around **88% of the comparable 2025 level**, while yard conditions remained stable and reefer pressure eased sharply as the citrus season wound down, with reefer stack occupancy falling to **36%** by 1 October. However, the improvement follows a weather-disrupted prior week and should not yet be interpreted as full normalisation: throughput remains below pre-crisis levels, while average anchorage and berth times remain elevated at around **224 hours and 81 hours**, respectively, and the vessel queue remains persistent. In the Eastern Cape, the recent period of elevated performance moderated, while Western Cape volumes softened slightly, illustrating how the effects of the prolonged Durban disruption continue to ripple through the wider port system.

Elsewhere, in the Eastern Cape, the extended period of high performance has slowed, with a decline in waterside volumes, though volumes remained well below the target. In the Western Cape, volumes decreased slightly, paired with low turnaround times, indicating a slow arrival stream as a result of the congestion at the port of Durban, as the consequences continue to ripple outward.

Global container shipping remains constrained by deteriorating reliability and persistent congestion, despite broadly stable freight rates. Schedule reliability fell **↓5.9%** to **49.9%** in August, while average delays for late arrivals reached **6.81 days**, their highest since March 2022. Congestion continues to absorb **3.76 million TEU**, or **10.9%** of the global fleet. Drewry's "*World Container Index*" eased **↓1%** to **$4,468 per 40ft container** on 24 September, while HARPEX remained at **2,450 points**. Transpacific rates have risen more than **↑180%** over five months, highlighting substantial divergence across trade lanes. China's holiday period is softening demand, although freight futures indicate a potential November–December rebound; the containership orderbook stands at a record **15.6 million TEU**.

Suez routings are recovering, with over **140 ships**, representing more than **2 million TEU**, returning since May; COSCO's first westbound transit in over two years is scheduled for **4 October**. The Panama Canal will raise Neo-Panamax slots to **10 daily from 15 October** and has increased permitted draft to **49 feet**. German dockworkers' strike ballot counting is scheduled for **2 October**, maintaining disruption risk at European gateways. The reported extension of the US–China port-fee suspension to **10 January 2027** remains unconfirmed.

The latest international air cargo to and from ORTIA shows a substantial increase in export cargoes – surpassing import cargoes for the first time in recent history. Therefore, for the week, the daily average inbound cargo amounted to **~590,500 kg** (**↓6%**, w/w) and outbound **~626,000 kg** (**↑37%**). With the outbound increase, the current numbers are **↑24%** above the same levels last year this time.

IATA's August data show demand (CTKs) rising **↑4.4%** year on year as capacity declined **↓0.1%**. The global load factor consequently rose **↑2%** to **46.0%**. Jet fuel prices were **↑79.2%** higher year on year, sustaining pressure on airline costs. Weekly data show that global air cargo volumes grew by **↑8%** year on year in mid-September, while average full-market and spot rates remained **↑24%** and **↑33%** above last year's levels, respectively. China's holiday period is compressing shipping schedules, with Gulf capacity still approximately **↓17%** below pre-conflict levels.

On the N4 corridor, movements increased – by around **49 trucks a day**, as trains from KM4 to Maputo were stable (at an average of **2 trains per day**). Truck volumes through the border post increased to **1,426 HGVs per day** (**↑3%**, w/w). Overall, queue times **increased slightly** to an average of **~5.2 hours** (**↑13%**) at the border. The average processing times **also increased** – to an average of **~5.1 hours** (**↑19%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time **increased by around half an hour this week**, as transit times **increased by the same magnitude**. The median border crossing times at South African borders increased by **nearly an hour**, averaging **~9.5 hrs** (**↑9%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) also increased (by about **a quarter of an hour**) – averaging **~8.2 hrs** (**↑4%**). This week, on average, **three** SADC border posts took a day or more to cross, namely Chirundu OSBP, Kasumbalesa (the worst affected, taking around **four days** to cross from the **Zambian side**), and Lunga Lunga.

Operational NTBs this week included **(1)** Zambia's rigid 5-day RIT transit window and agent suspensions, raising compliance risk and dwell times; **(2)** Namibia's FMD-related bans on cloven-hoofed animals and products, halting movements and risking consignment rejections; and **(3)** Tanzania's nationwide drivers' strike, causing corridor-wide freight stoppages, particularly on the Dar–Tunduma–Nakonde route.

Cabinet's endorsement of TNPA's separation from Transnet makes **getting corporatisation right imperative**. The **(1)** independently assessed valuation, **(2)** allocation of liabilities and **(3)** governance arrangements must **(a)** protect investment capacity, **(b)** ensure port revenues support port development, and **(c)** align tariffs with efficient costs and measurable service delivery. This reform must advance a systems approach, with ports, terminals, rail, road and border processes coordinated around shared accountability and the time, cost and reliability of moving cargo. The economic stakes are clear: August export values reached **R181.8 billion**, up **↑6.4%** year on year, while the preliminary January–August trade surplus increased to **R149.5 billion** from **R96.1 billion** in 2025. These figures underscore the scale of trade dependent on a functioning logistics network. Reliable, competitive logistics enables firms to access markets, secure production inputs and expand output, investment and employment. Getting the institutional and operational arrangements right is therefore fundamental to converting trade opportunities into sustained economic growth and broader socio-economic development.

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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 21 to 27 September (measured in TEUs)

7-day flow reported (21/09/2026 – 27/09/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Previously Pier 2)	4,388	30,716	↑53%
New Pier (Pier 1)	2,151	15,060	↑88%
Cape Town Container Terminal	1,852	12,961	↓15%
Ngqura Container Terminal	2,227	15,589	↓15%
Port Elizabeth Container Terminal	576	4,030	↓35%
Other	608	4,258	↓26%
Total	**11,802**	**82,614**	↑13%

Source: Calculated from TPT, 2026. Updated 27/09/2026.

An average of **~11,802 TEUs** (↑13%) was handled per day for the last week (*21 to 27 September, Table 2*). Despite the weekly increase, throughput was below the projected average of **~11,939 TEUs** (↓1% actual versus projected). For the coming week, an increased average of **~12,395 TEUs** (↑5%) is predicted to be handled (*28 September to 4 October*, *Table 3*).

Table 3 – Container Ports – Weekly flow projected for 28 September to 4 October (measured in TEUs)

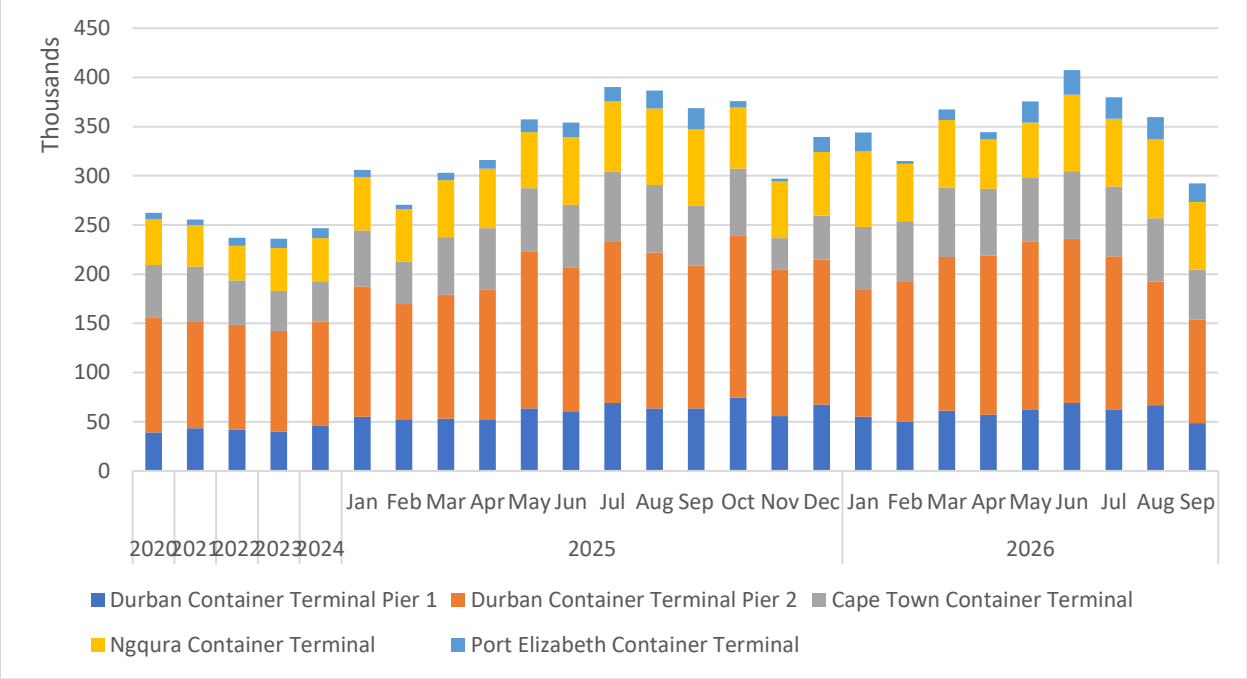
7-day flow projected (28/09/2026 – 04/10/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Previously Pier 2)[6]	5,124	35,865	↑%↓%
New Pier (Pier 1)	2,041	14,287	↓5%
Cape Town Container Terminal	1,893	13,248	↑2%
Ngqura Container Terminal	2,120	14,838	↓5%
Port Elizabeth Container Terminal	389	2,721	↓32%
Other	830	5,809	↑36%
Total	**12,395**	**86,768**	↑67%

Source: Calculated from TPT, 2026. Updated 27/09/2026.

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 27/09/2026.

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

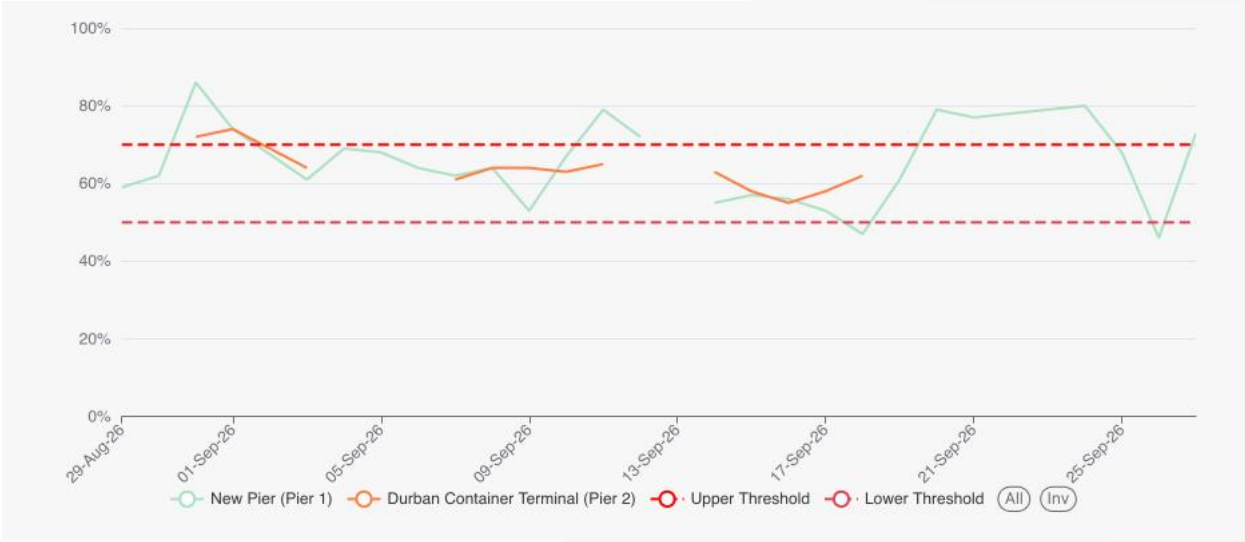
Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.5	1.7
Cape Town	FPT	0.4	2.7
Cape Town	MPT	0.0[7]	1.3[8]
Durban	DGT	5.8	5.1
Durban	Pier 1	2.7	2.5
East London	MPT	0.3	1.9
Ngqura	NCT	0.9	2.0
Port Elizabeth	PECT	1.2	1.2

Source: Calculated from Marine Traffic AIS data, 2026. Updated 29/09/2026.

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

[7] According to data from July 2026.
[8] Ibid

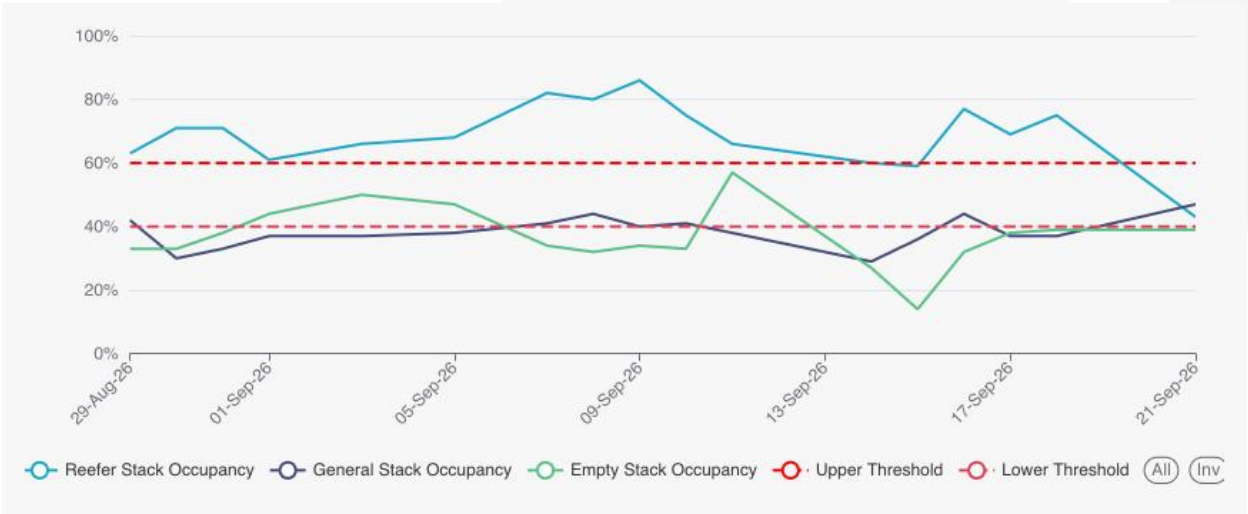
Figure 4 – Stack occupancy in Durban, general-purpose containers (29 August to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 27/09/2026.

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 (29 August to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 27/09/2026.

b. Summary of port operations

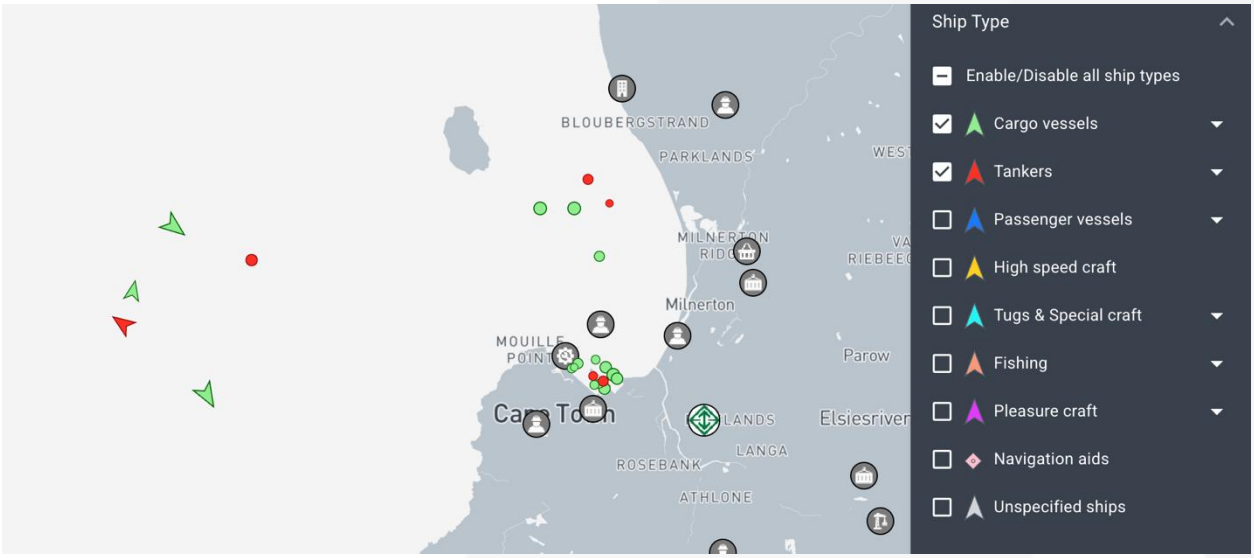
i. Cape Town

Cape Town Container Terminal reported a minor decline in waterside volumes, dropping just below their target volumes for the period. In addition to the reduction in waterside volumes, vessel turnaround times remained low, with vessels waiting at anchorage for an average of 18 hours and 60 hours at berth, with an average of two vessels waiting at anchorage throughout the week. Equipment availability remained strong with an average of eight out of nine cranes and 28 out of 32 RTGs available throughout the week. The decline in volumes is likely due to the continued congestion in Durban causing further delays in the extended supply chain, though additional pressures are anticipated for the coming week, as weather delays are anticipated.

Cape Town Multi-Purpose Terminal reported a significant decline in waterside volumes (down 31%), though the terminal managed to reach its target volumes for the period. Vessels spent an average of 57 hours at anchorage and 91 hours at berth. Equipment availability remained consistent with previous weeks, with an average of two out of three cranes and three out of five straddle carriers available throughout the week.

AGL Terminal finalised operations on a vessel running over from the previous week. No further operations were reported for the week.

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



Source: Marine Traffic. Updated 27/09/2026 at 14:00.

ii. Durban

Pier 1 showed a strong week, with waterside volumes up by 88%, reaching 109% of their target volumes, supported by an increased crane availability of five out of seven cranes, up from an average availability of three the previous week. In contrast, vessel turnaround time deteriorated, with time at anchorage reaching an average of 176 hours and time at berth was around 80 hours, with an average of five vessels waiting at anchorage (up from three the previous week). The **TTT** for the week averaged **~43 minutes** (**↓32%**, w/w), and the average **staging time** was **~32 minutes** (**↑10%**).

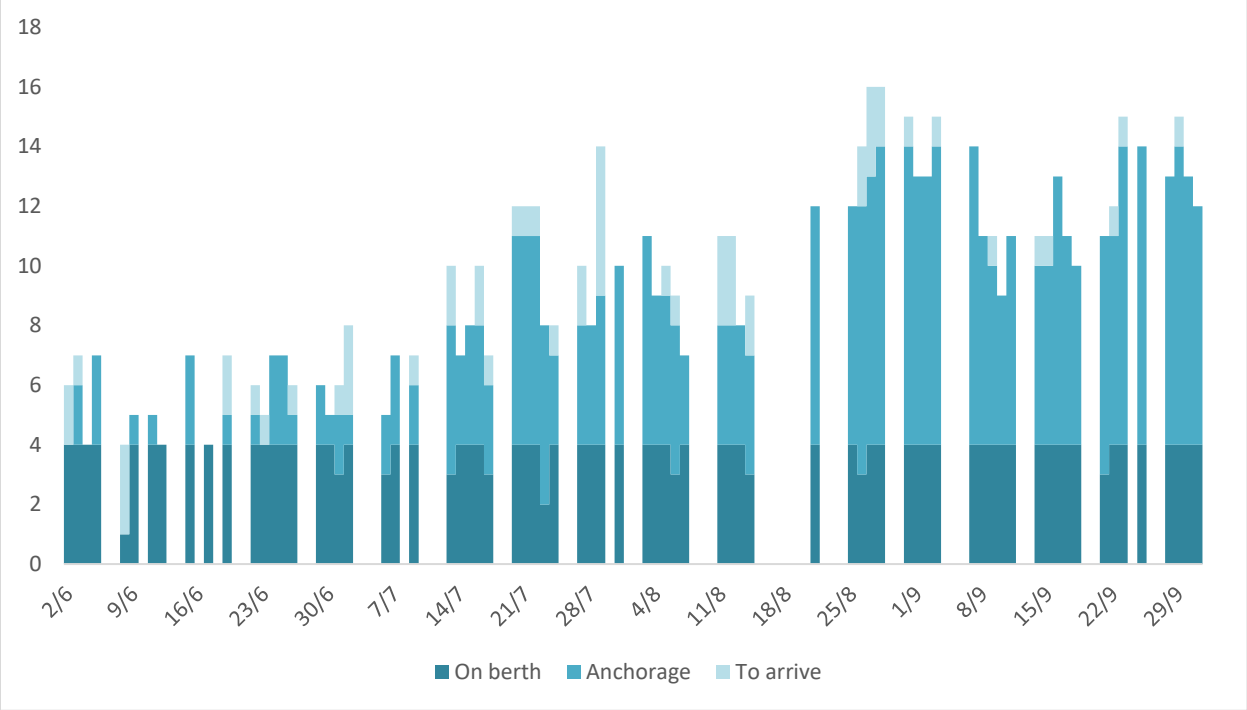
DGT recorded a notable improvement in waterside performance this week, with volumes increasing by **↑53%** (w/w) to approximately **88% of the comparable 2025 level**. The improvement follows a particularly weak previous week, when severe weather and flooding materially disrupted operations, and should therefore be viewed against that lower base.

Operationally, DGT has also reported progress within the terminal, including reduced unnecessary container shifting and the release of additional straddle-carrier capacity into productive operations. Yard conditions remain relatively stable, with general stack occupancy at **56.7%** on 1 October, while four vessels were working alongside. **R**eefer pressure has also eased materially as the citrus season draws to a close, with reefer stack occupancy declining to just **36%** on 1 October, compared with the **>100% levels recorded during the height of the August crisis.**

Nevertheless, **sustained fluidity at higher throughput levels has not yet been demonstrated**. Weekly throughput remains below pre-crisis operating levels, while vessel delays remain severe, averaging approximately **224 hours at anchorage** and **81 hours at berth**. The daily anchorage queue has also remained

elevated, moving from **10 vessels on 29 September to nine on 30 September and eight on 1 October**. Consequently, affected cargo owners and freight forwarders should continue planning for approximately **18–21 additional days** across impacted supply chains, as the vessel queues remain:

Figure 7 – DGT Vessel counts: on berth, at anchorage, to arrive (as of 1 October)



Source: Calculated from DGT

Durban Multi-Purpose Terminal reported a moderate decline of 8% in waterside volumes, only reaching 70% of their target volumes. Vessel turnaround times were elevated, with an average time at anchorage of 134 hours and berth time of 65 hours, with an average of two vessels waiting at anchorage.

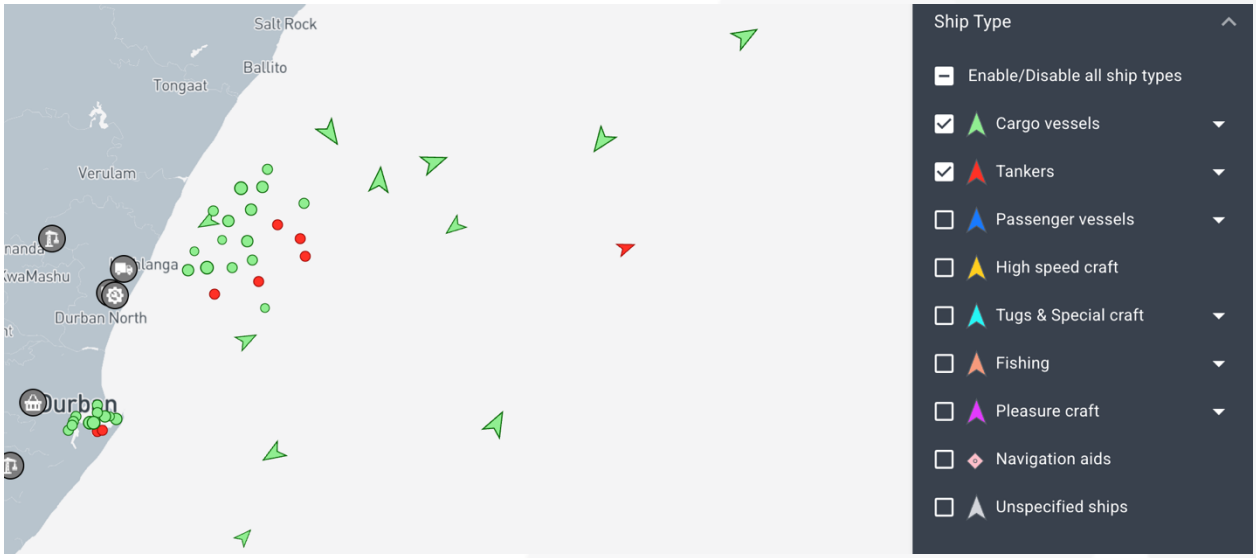
Figure 8 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)

Source: Calculated using data from Transnet, 2026, and updated 27/09/2026.

The queue of container vessels waiting outside Durban decreased this week to **31 vessels**. On Wednesday morning (30 September), **14** (down from last week) container vessels were waiting outside at anchorage for

Durban, **nine** for DGT, **two** for Point and **three** for Pier 1. The queue of dry (**seven**) decreased, liquid (**five**) increased, and breakbulk (**two**) remained the same:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 27/09/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal reported a minor decline in waterside volumes, though it remained well above the target volumes, at 128%. Vessels turnaround times increased slightly, with vessels spending an average of 89 hours at anchorage and 92 hours at berth, with an average of three vessels waiting at anchorage. Equipment availability remained consistent, with an average of six out of eight cranes and 24 out of 30 RTGs throughout the week.

Port Elizabeth Container Terminal volumes started to ease, as the terminal reported a reduction in waterside volumes of 35%, though the terminal achieved 162% of the period's target volumes. Vessel turnaround times were somewhat elevated, with vessels spending an average of 54 hours at anchorage and 28 hours at berth. Equipment availability remained consistent, with a full complement of equipment available throughout the week. A continued slowdown in operations is anticipated as poor weather conditions are predicted for the coming week.

iv. Richards Bay

At RBCT, the daily average coal throughput for the week **increased considerably and** averaged close to **176,000 tons** (**↑58%**, w/w) per day. With an average of **25 trains per day** being serviced, **above** the target of **22**.

v. Transnet Freight Rail (TFR)

In the last week (*21 to 27 September*), rail cargo on the ConCor line out of Durban was reported at **2,426** containers, up by **↑36%** from the previous week's **1,780** containers.

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

Source: Calculated using data from Transnet, 2025. Updated 27/09/2026.

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 (*21 to 27 September*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *September 2025* was **~979,249 kg**.

Table 5 – International inbound and outbound cargo from OR Tambo

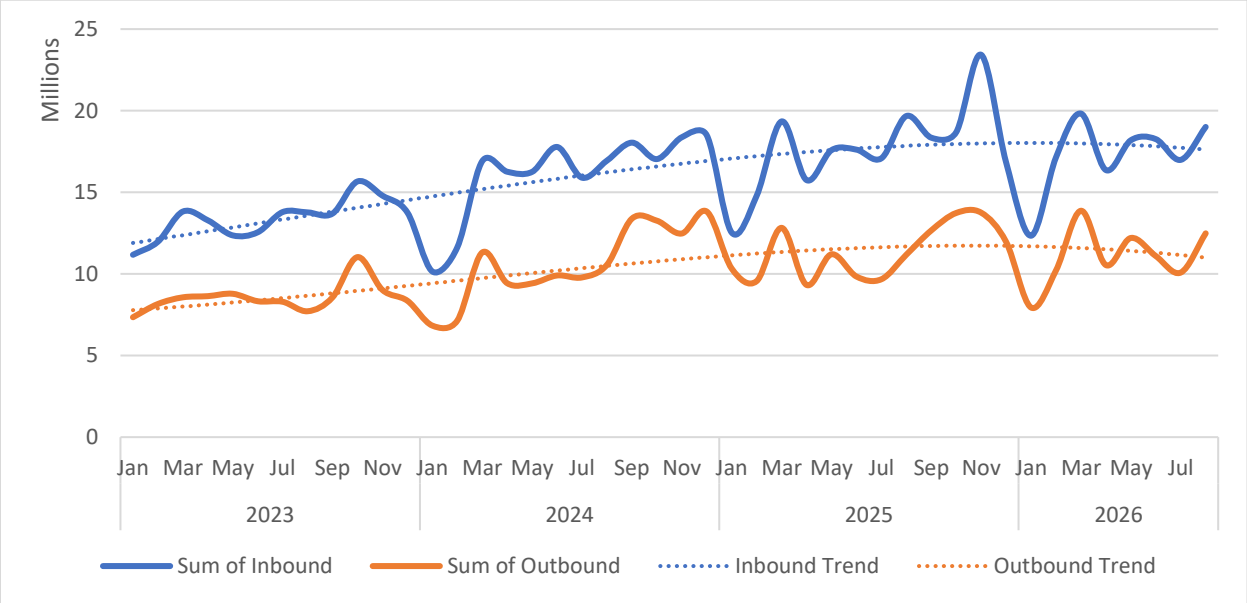
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**590,653**	**4,134,574**	**↓6%**
Volume outbound	**626,222**	**4,383,555**	**↑37%**
Total	**1,216,876**	**8,518,129**	**↑12%**

Courtesy of ACOC. Updated: 27/09/2026.

The latest international air cargo to and from ORTIA shows a substantial increase in export cargoes – surpassing import cargoes for the first time in recent history. Therefore, for the week, the daily average inbound cargo amounted to **~590,500 kg** (**↓6%**, w/w) and outbound **~626,000 kg** (**↑37%**). With the outbound increase, the current numbers are **↑24%** above the same levels last year this time.

The following figure shows the international air cargo flows to and from all terminals since the start of 2020:

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



Calculated from ACOC. Updated: 27/09/2026.

Jet fuel stock improved in the last week and is currently stable. The latest reported fuel stock days (as of Thursday morning, 1 October) per airport indicate:

- ORTIA: **9.3 days** (target: 5 days)
- CTIA: **5 days** (target: 4 days)
- Durban: **10.8 days** (target: 5 days)

3. Road and Regional Update

a. Lebombo border post update

In the last week (*21 to 27 September)*, movements increased – by around **49 trucks a day**, as trains from KM4 to Maputo were stable (at an average of **2 trains per day**).

- Truck volumes through the border post increased to **1,426 HGVs per day** (**↑3%**, w/w).
- Overall, queue times **increased slightly** to an average of **~5.2 hours** (**↑13%**) at the border.
- The average processing times **also increased** – to an average of **~5.1 hours** (**↑19%**) 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	1,426	1,407	1,076	197	44	68	42	273
% (w/w)	**3%**	**4%**	**2%**	**9%**	**-1%**	**-16%**	**-33%**	**-5%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 27/09/2026.

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

Figure 12 – Maputo vessel view (per vessel group)

Source: Marine Traffic. Updated 27/09/2026 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 around half an hour this week**, as transit times **increased by the same magnitude**.
- The median border crossing times at South African borders increased by **nearly an hour**, averaging **~9.5 hrs** (**↑9%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) also increased (by about **a quarter of an hour**) – averaging **~8.2 hrs** (**↑4%**).

1. **Zambia – 5-day Transit Allowance (RIT) causing operational delays:**
    a. No extensions allowed (even for breakdowns/accidents); if a transporter misses the window, the **Clearing Agent is suspended** until a written explanation is approved (can take 3+ days).
    b. Agents are now **reluctant to pre-clear**, fearing penalties they cannot control; reported "havoc" at **Kazungula** and **Nakonde/Tunduma**.
    c. Seen as contrary to **AfCFTA/SADC trade facilitation**, adding a regulatory NTB on transit cargo.
2. **Namibia – FMD in FMD-free zone:**
    a. FMD confirmed in **Karasburg**; **nationwide suspension** of movement, import and export of **cloven-hoofed animals and their products** until further notice.[9]
    b. WOAH suspended Namibia's **"FMD-free where vaccination not practised"** status (effective 22 Sept); beef/livestock export markets at risk.
    c. Immediate SPS NTB for regional livestock/beef supply chains and any cross-border animal-product movements.

[9] Van Der Merwe, J. 23/09/2026. Namibia bans exports and animal movement after confirmed FMD case.

3. **Tanzania – Nationwide drivers' strike (29 Sept):**
    a. Bus and transit cargo truck drivers struck over **police mistreatment**, aggressive **licence point deductions/bribes**, and a directive forcing **passenger drop-offs only at designated areas**.
    b. Strike covered **Arusha, Dar es Salaam, Kilimanjaro, Manyara, Morogoro, Mwanza, Mbeya, Tunduma**; 100s of trucks parked along key corridors, disrupting regional freight.
    c. High risk of missed delivery windows and spillover delays into **Zambia/Nakonde** and other landlocked markets.

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

Table 7 – Delays[10] summary – South African borders[11] (both directions)

Border Post	Direction	HGV[12] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	598	21.2	4.5	21.1	17,940	4,186
Beitbridge	Zimbabwe-SA	547	4.4	1.2	4.2	16,410	3,829
Groblersbrug	SA-Botswana	247	17.2	1.5	17.2	7,410	1,729
Martin's Drift	Botswana-SA	195	2.3	0.3	2.2	5,850	1,365
Kopfontein	SA-Botswana	230	8.1	1.4	8.0	6,900	1,610
Tlokweng	Botswana-SA	97	0.6	0.2	0.4	2,910	679
Vioolsdrift	SA-Namibia	30	4.7	1.5	4.4	900	210
Noordoewer	Namibia-SA	20	2.0	0.5	2.0	600	140
Nakop	SA-Namibia	30	3.2	1.1	3.1	900	210
Ariamsvlei	Namibia-SA	20	1.3	0.4	1.2	600	140
Skilpadshek	SA-Botswana	306	14.0	2.5	14.0	9,180	2,142
Pioneer Gate	Botswana-SA	96	2.2	1.3	2.1	2,880	672
Ramatlabama	SA-Botswana	163	3.1	0.6	3.0	4,890	1,141
Ramatlabama	Botswana-SA	96	0.5	0.1	0.3	2,880	672
Lebombo	SA-Mozambique	1,370	5.2	2.2	5.1	41,100	9,590
Ressano Garcia	Mozambique-SA	1,335	2.8	0.3	2.5	40,050	9,345
Sum/Average		**5,380**	**5.8**	**1.2**	**5.7**	**161,400**	**37,660**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 20/09/2026.

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	5.7	2.1	6.7	9,600	2,240
Central Corridor	798	4.2	1.9	4.1	23,940	5,586
Dar Es Salaam Corridor	1,819	23.1	7.4	23.2	54,570	12,733
Maputo Corridor	2,705	4.0	1.2	3.8	81,150	18,935
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,712	18.8	4.3	18.8	111,360	25,984
Northern Corridor	2,817	0.4	0.1	0.4	92,520	21,588
WBNLD Corridor	1,018	4.2	0.9	4.1	30,540	7,126

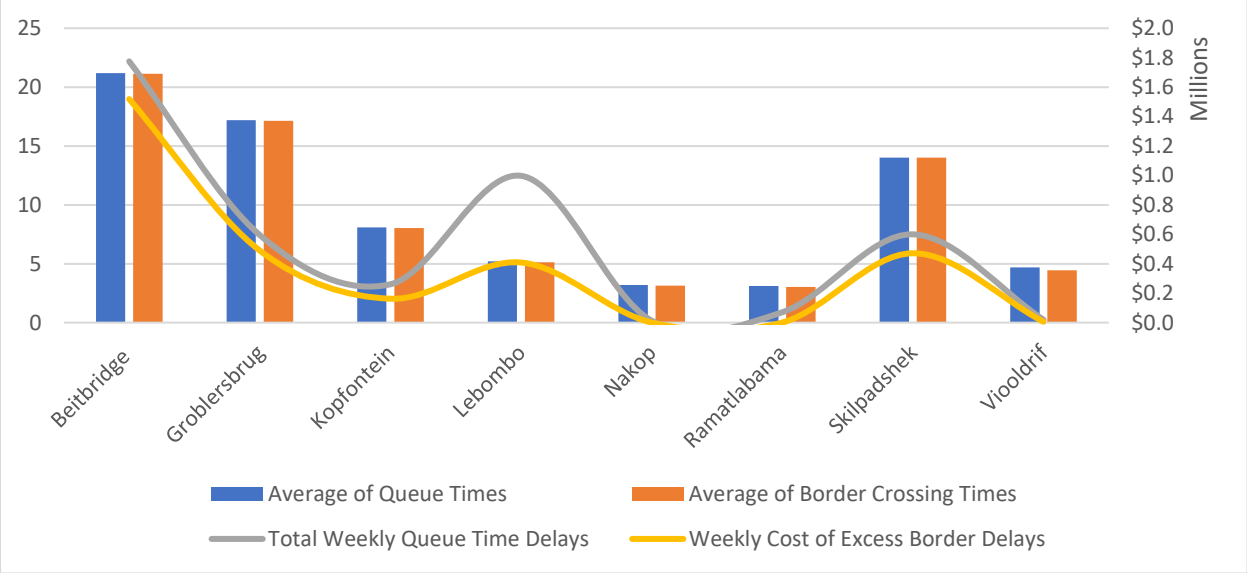
[10] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[11] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[12] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Trans Cunene Corridor	100	2.8	0.9	2.7	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	23.1	2.9	22.8	3,480	812
Sum/Average	**13,632**	**8.4**	**2.2**	**8.4**	**416,970**	**97,293**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 20/09/2026.

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

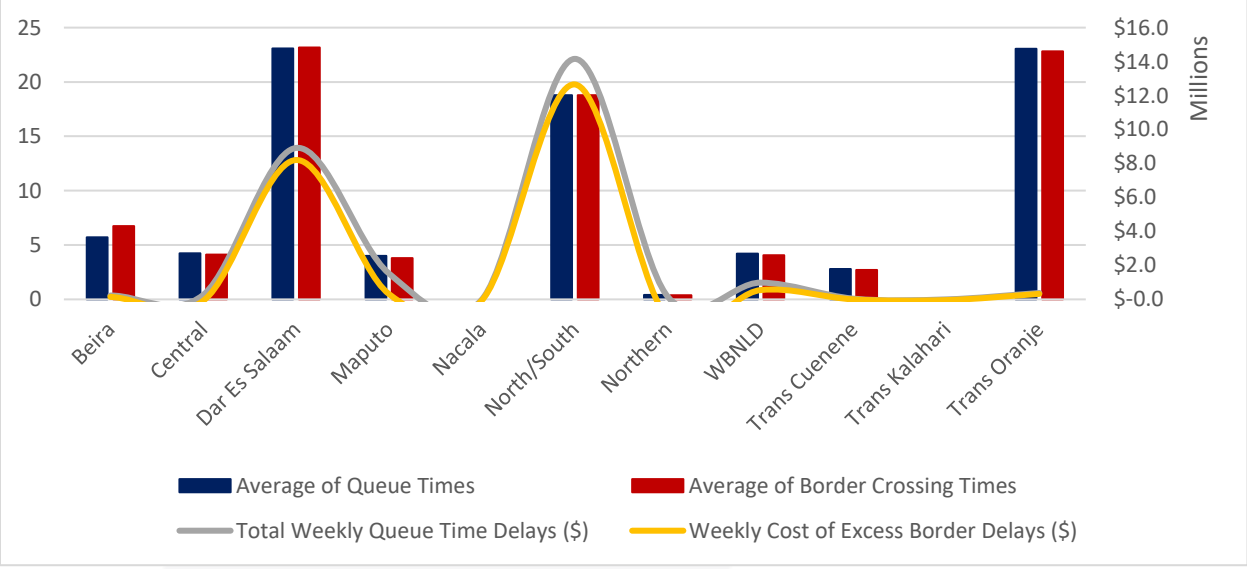
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 20/09/2026.

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

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



Source: Calculated from TransAfricaBorder & Crickmay, week ending 20/09/2026.

In summary, cross-border queue time averaged **~8.4 hours** (up by **~0.4 hours** from the previous week's **~8 hours**), indirectly costing the transport industry an estimated **$26.7 million** (**R437 million**). Furthermore, the week's average cross-border transit times also hovered around **~8.4 hours** (up by **~0.4 hours** from the previous week's **~8 hours**), at an indirect cost to the transport industry of **$20.9 million** (**R342 million**). The total indirect cost for the week amounts to an estimated **~$47.5 million** (**R789 million**, up by **↑~14%** from the **~R683 million** in the previous report).

4. International Update

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

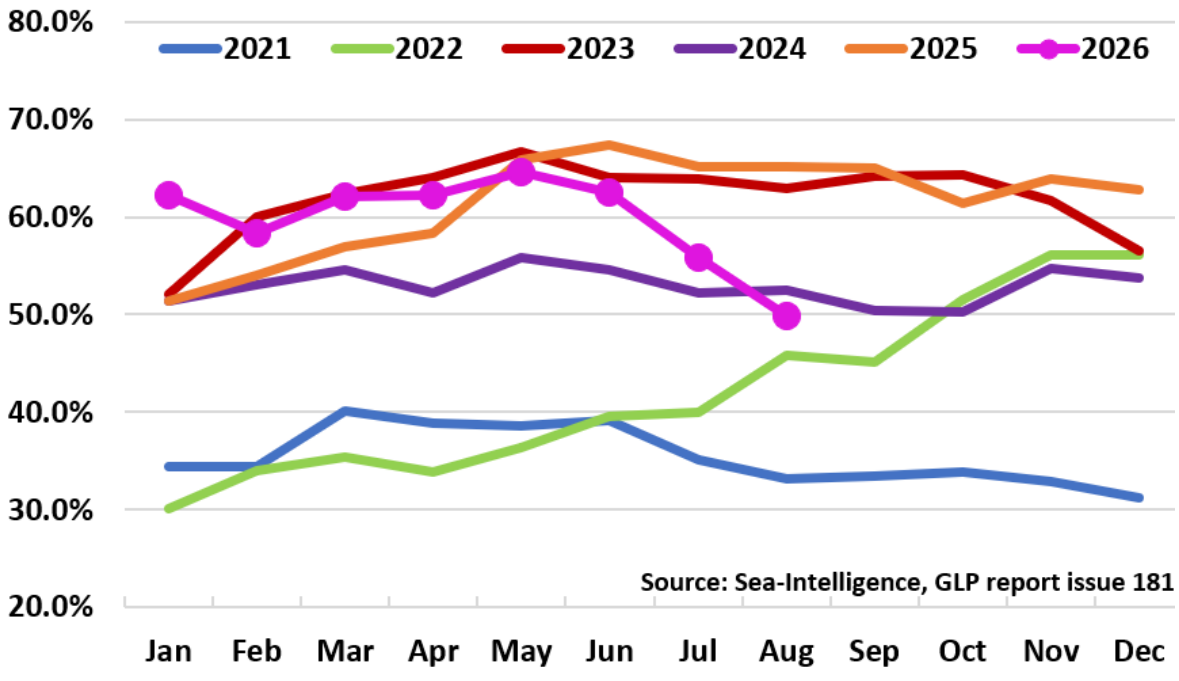
a. Global shipping industry

i. Global shipping reliability

Global container schedule reliability fell by **↓5.9%** (m/m) to **49.9%** in August, its lowest level since September 2022, according to *Sea-Intelligence*. This marked the second consecutive sharp deterioration amid severe Asian port congestion. Average delays for late vessel arrivals increased by **↑0.60 days** to **6.81 days**, the highest since March 2022 and **↑1.92 days** above August 2025.

Maersk remained the most reliable major carrier at **67.3%**, followed by Hapag-Lloyd at **61.5%**; Wan Hai ranked last at **23.2%**. None of the 13 major carriers improved month on month or year on year. For the July–August alliance comparison, Gemini recorded **77.8%** reliability, ahead of MSC (**70.1%**), Ocean Alliance (**48.3%**) and Premier Alliance (**43.2%**).

Figure 15 – Global schedule reliability (%)

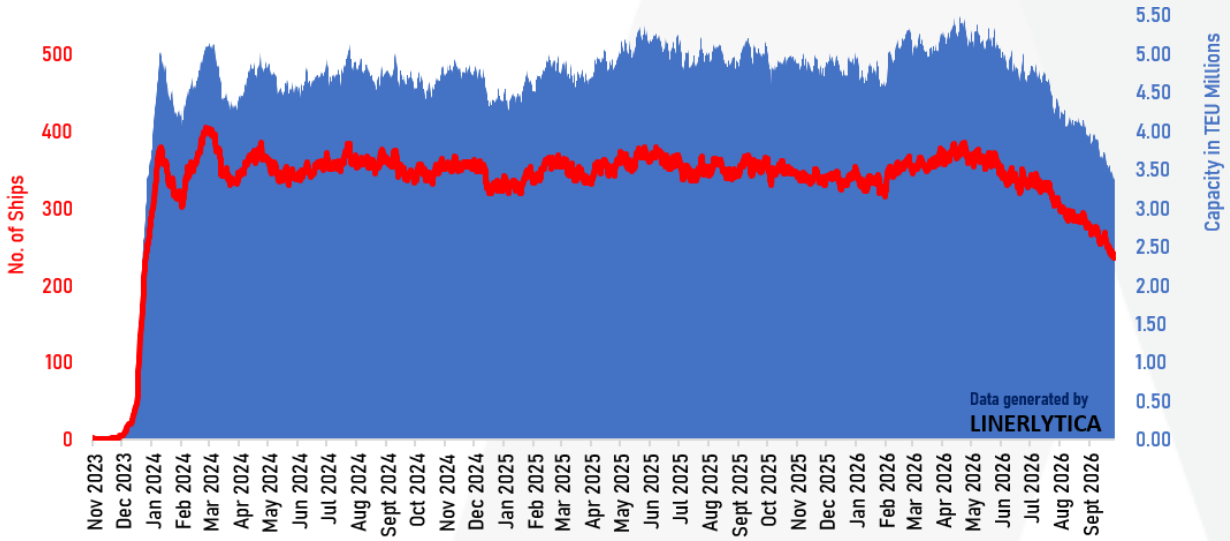


Source: Sea Intelligence

ii. Global container industry summary

Congestion continues to constrain supply, with **3.76 million TEU**, or **10.9%** of the global fleet, tied up in congestion. Transpacific rates have increased by more than **↑180%** over five months, supported by recovering China–US exports. Meanwhile, the containership orderbook has reached a record **15.6 million TEU**, adding substantial future capacity. Carriers are also returning to Suez: more than **140 ships**, representing over **2 million TEU**, have switched back since May. COSCO's first westbound transit in more than two years is scheduled for **4 October**, using the 24,188-TEU *OOCL Spain*.

Figure 16 – Containerships diverted from Suez to Cape route (2023-2026)



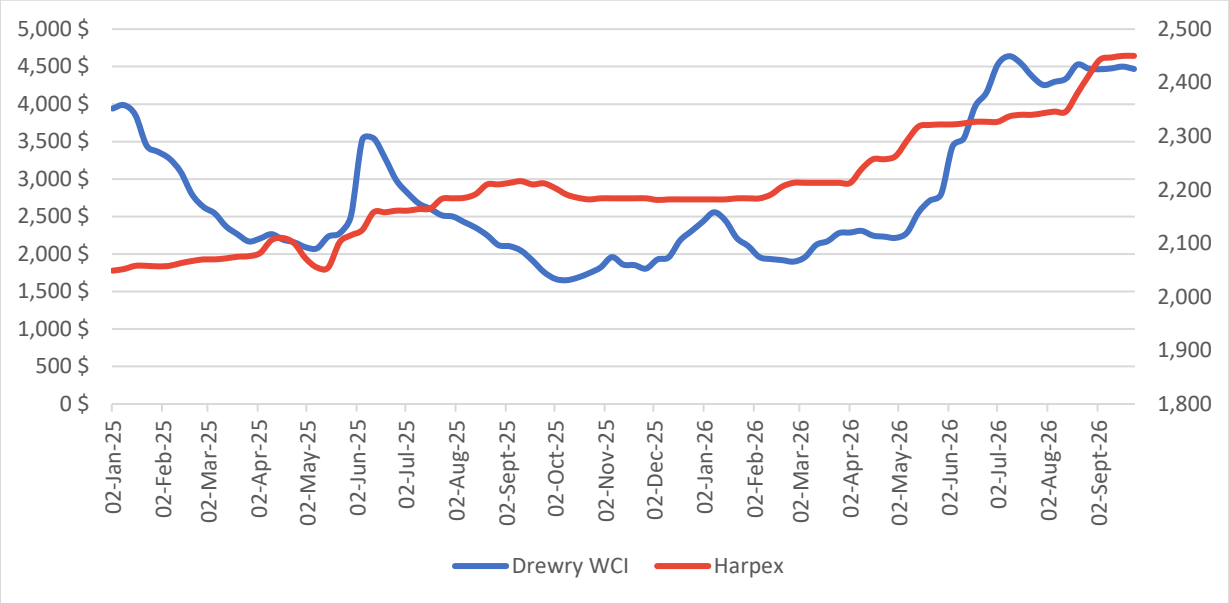
Source: Linerlytica

In other global shipping news, **(1)** the Panama Canal will increase Neo-Panamax transit slots to **10 per day from 15 October**, while raising permitted draft to **49 feet with immediate effect**, easing restrictions on large container vessels; **(2)** BIMCO cautions that a reported extension of the reciprocal US–China port-fee suspension to **10 January 2027** remains unconfirmed, leaving future cost exposure unresolved; and **(3)** German dockworkers' ballot on indefinite strike action closes on **1 October**, with counting scheduled for **2 October**, creating further disruption risk at northern European gateways.

iii. Container freight and charter rates

Container spot freight rates remained broadly stable in *Drewry's* 24 September assessment, with the World Container Index easing **↓1%** to **$4,468 per 40ft container**. The Shanghai Containerised Freight Index (SCFI) rates also ended their 2-month "*winning streak*" as container freight rates eased for the first time since July ahead of China's Golden Week holidays. *Linerlytica* notes that freight futures still point to a rebound in November and December, while vessel charter rates remain firm across size segments. Back to Drewry: Asia–Europe rates declined by **↓4–5%**, while Shanghai–Los Angeles increased **↑2%** and Shanghai–New York remained unchanged. The *HARPEX* container-charter index was unchanged at **2,450 points** on 25 September, indicating continued stability in vessel charter rates.

Figure 17 – Drewry World Container Index ($/40ft) & Harper-Petersen Charter Rates (index)

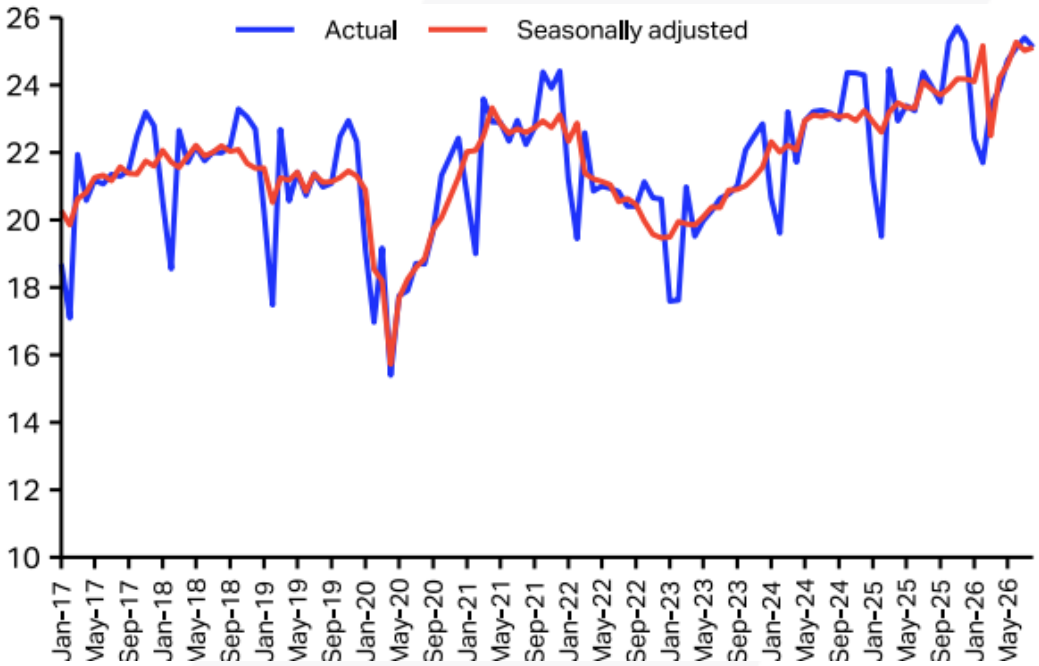


Source: Calculated from Drewry & Harpex

b. Global air cargo industry

IATA this week released its latest "*Air Cargo Market Analysis*" for August, showing that global air cargo demand, measured in cargo tonne-kilometres (CTKs), rose by **↑4.4%** year on year, while capacity declined by **↓0.1%**. This lifted the global cargo load factor by **↑2%** to **46%**.

Figure 18 – Chargeable weight and rates (last five weeks)



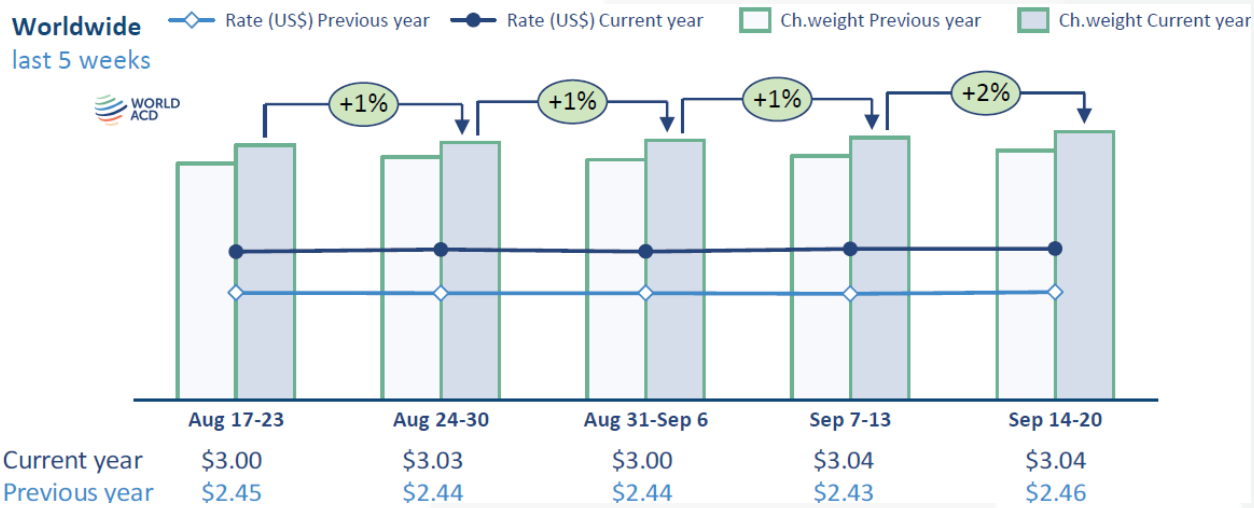
Source: IATA

International demand grew by **↑5.3%** against capacity growth of just **↑0.1%**, with its load factor rising by **↑2.6%** to **51.3%**. Cargo yields, including surcharges, increased by **↑1.3%** (m/m) and **↑24.9%** (y/y), ending

three consecutive months of decline. Jet fuel averaged **$157/barrel**, up **↑79.2%** (y/y), maintaining pressure on airline margins. African carriers recorded demand growth of **↑3.0%**, but capacity expanded by **↑14.0%**, reducing their load factor by **↓3.9%** to **36.5%**. Capacity additions therefore diluted African carriers' utilisation despite rising traffic.

The latest weekly data from WorldACD indicate that global air cargo volumes rose by **↑2%** (w/w) in week 38 (14–20 September), placing them **↑8%** above the corresponding week last year, according to WorldACD. North American volumes rebounded by **↑14%** after Labour Day, while Asia Pacific recorded 11% growth year on year. Rates remained stable but elevated: full-market averages held at **$3.04/kg**, **↑24%** above last year, while spot rates averaged **$3.45/kg**, up **↑33%**. International capacity increased by **↑4%** year on year, although Gulf capacity remained approximately **↓17%** below levels preceding the US–Iran conflict.

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



Source: WorldACD

Trade-lane performance diverged: Asia Pacific–US volumes increased by **↑13%** year on year, whereas Hong Kong–Europe volumes remained **↓29%** lower. Africa's outbound volumes fell by **↓4%** week on week, while average rates rose by **↑6%** to **$2.47/kg**. China's Mid-Autumn Festival and Golden Week holidays are compressing shipping schedules, although additional charter capacity is containing immediate rate pressure.

Elsewhere, Ethiopian Airlines also announced an order for ten Boeing freighters on 30 September, comprising eight 777-8Fs and two 777Fs. The investment supports the long-term expansion of its global cargo network and Africa's intercontinental freight connectivity.

ENDS[13]

[13]***DISCLAIMER:*** *The Cargo Movement Report is a free industry information service compiled by the Southern African Association of Freight Forwarders NPC ("SAAFF"). The underlying data is obtained from third-party operators and industry sources, which remain the originators of that data. SAAFF collates, cleans and consolidates it in good faith. SAAFF does not independently verify the source data.*

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