SAVINO DEL BENE®
Global Logistics and Forwarding Company

CARGO MOVEMENT UPDATE

Date: 27 September 2026

Key Notes

- An average of **11,802 TEUs** was handled per day, with **12,395 TEUs** projected for next week.
- DGT: **4,388 TEUs/day (↑53%, w/w)**; reefers **36%**; queue **eight (1 Oct)**; delays **18–21 days**.
- 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%)**.
- August schedule reliability: **49.9% (↓5.9 percentage points, m/m)**; late-arrival delays: **6.81 days**.
- IATA August: demand **↑4.4% (y/y)**; capacity **↓0.1%**; load factor **46%**; jet fuel **↑79.2% (y/y)**.

i. Port operations - General

- At our container terminals, an average of **11,802 TEUs** was handled daily, up from **10,405 TEUs** the previous week (**↑13%, w/w**).
  - For the coming week, an increased average of **~12,395 TEUs (↑5%)** is predicted to be handled.
- Port performance was mixed: **DGT and Pier 1 increased throughput**, while Western Cape volumes softened and Eastern Cape performance moderated but remained above target.
- At DGT, throughput recovered to approximately **88% of the comparable 2025 level**, following a weather-disrupted prior week; sustained recovery at higher volumes remains unproven.
- In the Eastern Cape, **NCT reached 128% of target** and **PECT 162%**, despite lower waterside volumes and elevated vessel delays.
- The broader port system continues to absorb DGT-related disruption; the reported weekly Durban vessel queue eased to **31 vessels**, from **33**.
- Cabinet endorsed **TNPA's separation from Transnet**; getting corporatisation right is imperative.
  - Valuation, liabilities and governance must protect investment capacity, direct port revenues towards port development, and align tariffs with **efficient costs and measurable service delivery**.
  - Coordination across ports, terminals, rail, road and borders must support trade and socio-economic development. August exports reached **R181.8 billion (↑6.4%, y/y)**; the preliminary January–August trade surplus rose to **R149.5 billion**, from **R96.1 billion** in 2025.

ii. Port operations – Performance Metrics

- CTCT handled an average of **~1,852 TEUs (↓15%, w/w)** a day, with a projected average of **~1,893 TEUs (↑2%)** next week.
  - Cape Town Container Terminal throughput slipped just below target; an average of **two vessels** waited at anchorage.
  - Vessels spent an average of **~18 hours at anchorage** and **~60 hours at berth**.
  - Operations were supported by **eight out of nine cranes** and **28 out of 32 RTGs**.
- Pier 1 handled an average of **~2,151 TEUs (↑88%, w/w)** a day, with a projected average of **~2,041 TEUs (↓5%)** next week.
  - Vessels spent an average of **~176 hours at anchorage** and **~80 hours at berth**, with **five vessels waiting**.
  - Crane availability improved to **five out of seven cranes**, from an average of **three** the previous week.
  - Pier 1 reached **109% of target volumes**, although vessel waiting times increased.
  - The TTT for the week averaged **~43 minutes (↓32%, w/w)**, and average staging time was **~32 minutes (↑10%)**.

- DGT handled an average of **~4,388 TEUs (↑53%, w/w)** a day, with a projected average of **~5,124 TEUs (↑17%)** next week.
    - Actual weekly DGT throughput increased to **30,716 TEUs**, approximately **88% of the comparable 2025 level**, following the weather-disrupted prior week.
    - Vessel delays remain severe, averaging **~224 hours at anchorage** and **~81 hours at berth**; the queue eased from **10 vessels on 29 September** to **eight on 1 October**.
    - On 1 October, general stack occupancy was **56.7%** and reefer occupancy **36%**, down from **over 100%** during the August crisis as the citrus season wound down.
    - Reduced unnecessary container shifting released additional straddle-carrier capacity into productive operations; **four vessels** were working alongside on **1 October**.
    - Throughput remains below pre-crisis levels, with sustained fluidity at higher volumes still unproven. Affected supply chains should allow for **18–21 additional days**.
    - Durban Multi-Purpose Terminal recorded a **↓8%** decline in waterside volumes, reaching **70% of target**.
    - Vessels at Durban MPT spent an average of **134 hours at anchorage** and **65 hours at berth**, with **two vessels waiting**.
    - The reported weekly Durban vessel queue decreased to **31 vessels**, from **33** last week.
    - On Wednesday morning (**30 September**), **14 container vessels** were waiting at anchorage: **nine for DGT**, **two for Point** and **three for Pier 1**.
    - The wider anchorage queue comprised **seven dry**, **five liquid** and **two breakbulk vessels**.
    - South Africa's other container terminals produced the following results for the week:
- Ngqura Container Terminal handled an average of **~2,227 TEUs (↓15%, w/w)** a day, with a projected average of **~2,120 TEUs (↓5%)** next week.
    - NCT handled **128% of target**; vessels spent **89 hours at anchorage** and **92 hours at berth**, with an average of **three vessels waiting**.
    - NCT operated with an average of **six out of eight cranes** and **24 out of 30 RTGs**.
- Port Elizabeth Container Terminal handled an average of **~576 TEUs (↓35%, w/w)** a day, with a projected average of **~389 TEUs (↓32%)** next week.
    - PECT reached **162% of target**; vessels spent **54 hours at anchorage** and **28 hours at berth**.
    - PECT reported a **full complement of equipment**, with a further slowdown anticipated amid poor weather.
    - At RBCT, daily average coal throughput increased to close to **176,000 tons (↑58%, w/w)**.
- An average of **25 trains per day** was serviced, above the target of **22**.
    - In the last week (**21 to 27 September**), rail cargo on the ConCor line out of Durban was reported at **2,426 containers (↑36%, w/w)**.
- This was up from **1,780 containers** in the previous week.

iii. Lebombo border post update

*In the last week (**21 to 27 September**), movements increased by around **49 trucks a day**, while trains from KM4 to Maputo averaged **two trains per day**.*

- Truck volumes through the border post increased to **1,426 HGVs per day (↑3%, w/w)**.
- Overall, queue times increased to an average of **~5.2 hours (↑13%)** at the border.
- The average processing time increased to **~5.1 hours (↑19%)** per crossing.

iv. SADC cross-border road freight update

- Overall, average queue and transit times both increased by approximately **0.4 hours**.
- The median border crossing time at South African borders increased to **~9.5 hrs (↑9%)** for the week.
- The greater SADC region (excluding South African-controlled borders) increased to **~8.2 hrs (↑4%)**; **three monitored borders** averaged a day or more to cross.
- **Kasumbalesa** remained the worst affected, taking around **four days** from the Zambian side; **Chirundu OSBP** and **Lunga Lunga** also exceeded a day.

1. **Zambia – five-day transit allowance (RIT):**
    a. No extensions are allowed, including for breakdowns or accidents. Missing the window can trigger clearing-agent suspension pending approval of a written explanation, taking **three or more days**.
    b. Agents are reluctant to pre-clear cargo, fearing penalties outside their control; resulting delays affect **Kazungula** and **Nakonde/Tunduma**.
2. **Namibia – foot-and-mouth disease restrictions:**
    a. FMD was confirmed in **Karasburg**, prompting a nationwide suspension of movement, imports and exports of cloven-hoofed animals and their products until further notice.
    b. WOAH suspended Namibia's FMD-free status effective **22 September**, placing livestock and beef export markets at risk.
3. **Tanzania – nationwide drivers' strike:**
    a. The **29 September** strike over police treatment and licence penalties left hundreds of trucks parked along key corridors, disrupting transit cargo movements.
    b. The **Dar–Tunduma–Nakonde corridor** faces missed delivery windows and spillover delays into Zambia and other landlocked markets.

- Average cross-border queue and transit times were both **~8.4 hours**, at estimated indirect costs of **$26.7 million (R437 million)** and **$20.9 million (R342 million)**, respectively.
- Total indirect costs for the week were reported at approximately **$47.5 million**, compared with **$42.2 million** in the previous report.

v. Shipping industry

- Global schedule reliability fell **↓5.9 percentage points (m/m) to 49.9%** in August, its lowest level since **September 2022**.
    - Delays for late arrivals averaged **6.81 days**, up **0.60 days (m/m)** and **1.92 days (y/y)**, their highest since **March 2022**.
    - **Maersk (67.3%)** and **Hapag-Lloyd (61.5%)** led the major carriers; none of the **13** improved month on month or year on year.
- Congestion continues to absorb **3.76 million TEU**, or **10.9% of global containership capacity**.
- The containership orderbook reached a record **15.6 million TEU**, while vessel charter rates remained firm across size segments.
    - Transpacific rates have increased by **more than ↑180% over five months**, supported by recovering China–US exports.
- Drewry's WCI stood at **$4,468/40ft (↓1%, w/w)** on **24 September**, while **HARPEX remained at 2,450 points** on **25 September**.
    - Asia–Europe rates fell **↓4–5%**, Shanghai–Los Angeles rose **↑2%**, and Shanghai–New York remained unchanged.

- SCFI ended its two-month rally ahead of China's Golden Week; freight futures still indicate a **potential November–December rebound**.
- Suez routings are recovering: **over 140 ships**, representing **more than 2 million TEU**, have returned since May. COSCO's first westbound transit in over two years is scheduled for **4 October**.
- In other global shipping news:
    - The Panama Canal will raise Neo-Panamax slots to **10 daily from 15 October**; permitted draft increased to **49 feet** with immediate effect.
    - The reported extension of the US–China port-fee suspension to **10 January 2027** remains **unconfirmed**, leaving future cost exposure unresolved.
    - German dockworkers' strike ballot closes on **1 October**, with counting on **2 October**, maintaining disruption risk at European gateways.

vi. International air cargo: South Africa

- For **21 to 27 September**, daily ORTIA cargo averaged **~590,500 kg inbound (↓6%, w/w)** and **~626,000 kg outbound (↑37%)**.
    - Combined daily international cargo averaged **~1.22 million kg**, with current volumes **↑24%** above the same period in **2025**.

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)
- Outbound cargo exceeded inbound volumes, with weekly exports of **~4.38 million kg**, against imports of **~4.13 million kg**.
- Total international air cargo for **21 to 27 September** amounted to approximately **8.52 million kg (↑12%, w/w)**.

vii. International air industry

- WorldACD's **Week 38 (14–20 September)** volumes rose **↑2% (w/w)** and **↑8% (y/y)**; full-market rates held at **$3.04/kg (↑24%, y/y)** and spot rates at **$3.45/kg (↑33%)**.
    - Asia Pacific–US volumes rose **↑13% (y/y)**, while Hong Kong–Europe fell **↓29%**. International capacity grew **↑4% (y/y)**, but Gulf capacity remained **↓17% below pre-conflict levels**.
    - Africa-origin volumes fell **↓4% (w/w)**, while average rates rose **↑6% to $2.47/kg**.
    - China's Mid-Autumn Festival and Golden Week are compressing shipping schedules; additional charter capacity is containing immediate rate pressure.
- IATA's **August** data show global demand (CTKs) rising **↑4.4% (y/y)**, against capacity declining **↓0.1%**; load factor increased **↑2.0 percentage points to 46.0%**.
    - International demand grew **↑5.3%**, capacity **↑0.1%**, and load factor **↑2.6 percentage points to 51.3%**.
    - Cargo yields rose **↑1.3% (m/m)** and **↑24.9% (y/y)**; jet fuel averaged **$157/barrel (↑79.2%, y/y)**, sustaining airline cost pressure.
    - African carriers' demand grew **↑3.0%**, but capacity rose **↑14.0%**, reducing load factor by **↓3.9 percentage points to 36.5%**.
- Ethiopian Airlines ordered **ten Boeing freighters** on **30 September**: **eight 777-8Fs** and **two 777Fs**, supporting long-term cargo-network expansion.