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Cargo Movement Update #291[1]

Date: 19 July 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)	24,443	27,848	**52,291**	29,024	33,067	**62,091**	**↓16%**
Air Cargo (tons)	4,248	2,505	**6,752**	4,201	2,341	**6,541**	**↑3%**

Monthly Snapshot

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

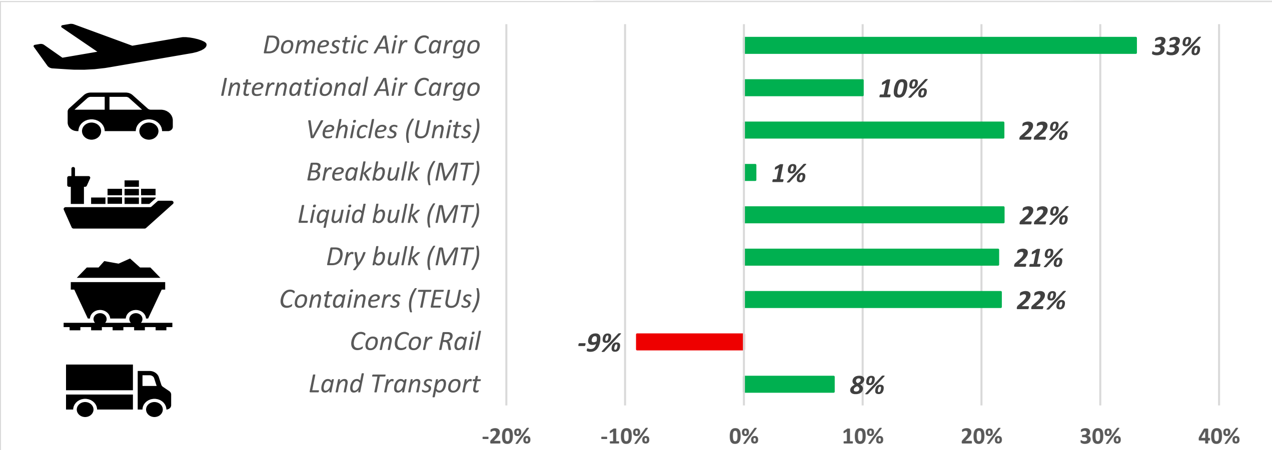
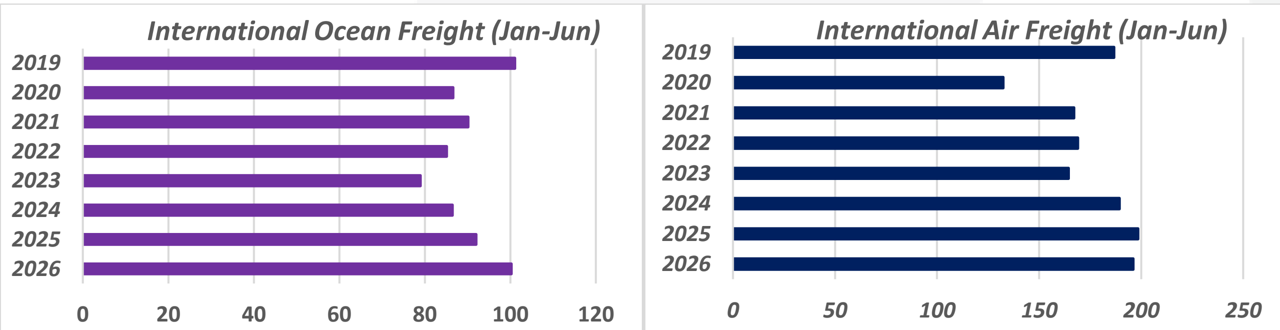


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **7,470 TEUs** was handled per day, with **7,912 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3,127** containers, up by **↑43%** from last week.
- Cross-border queue: **↑0.7 hrs**; transit: **↑0.7 hrs**; SA borders: **~10 hrs** (**↑15%**); SADC: **~7.5 hrs** (**↑9%**).
- The average number of arrivals through the Strait of Hormuz was **14 vessels/day** (all types) in the last week.
- Drewry's *WCI* fell **↓2%** to **$4,547/40"** (week ending 16 July), after rising to a 22-month high the previous week.
- Global air cargo volumes were down by **↓4%** (w/w), while average rates fell **↓3%** to **$3.03/kg**.

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[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *291st* 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: June vs. June.
[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 **7,470 TEUs** was handled daily, a decrease from **8,870 TEUs** the previous week.

Port operations showed strong performance in the Eastern Cape and Western Cape, with consistent equipment availability and an increase in waterside volumes (in some instances a decrease while outperforming target volumes), in spite of some minor weather delays. In contrast, performance in KwaZulu-Natal was challenged by congestion, particularly on the landside, while waterside operations at DGT and Durban MPT showed improvement, likely aggravating the congestion, particularly as DGT is likely trying to make up for slow vessel turnaround times.

Global shipping conditions remained highly disrupted as conflict in the Persian Gulf constrained traffic through the Strait of Hormuz, where ship arrivals averaged only **14 vessels per day** in the week to 19 July. Houthi threats in the Bab el-Mandeb also forced two Saudi crude tankers to reverse course, compounding risks across both strategic chokepoints. Although only **24 containerships**, totalling **69,000 TEU**, remained idle in the Persian Gulf, bunker prices rose **↑20%** over two weeks, and capacity stayed tight on Asia–Europe and US West Coast services. East Asian congestion also remained elevated, with Shanghai/Ningbo recording a queue-to-berth ratio of **2.43**. Drewry's WCI eased **↓2%** to **$4,547 per 40-foot container** after reaching a 22-month high, while the HARPEX edged **↑0.1%** to **2,340**, indicating firm charter markets despite the modest spot-rate correction.

International air cargo to ORTIA was stable this week. The daily average amounted to **~607,000 kg** inbound (**↑1%**, w/w) and **~358,000 kg** outbound (**↑↓%**). Current volumes to and from ORTIA remain significantly above the commensurate volumes of July last year (**↑14%**) and also above the pre-pandemic July of 2019 (**↑14%**).

Worldwide air cargo demand softened in week 28, with global chargeable weight falling **↓4%** week on week and average rates declining **↓3%** to **$3.03/kg**, although rates remained **↑24%** above last year. Global spot rates also fell **↓3%** to **$3.47/kg** but were still **↑32%** higher year on year; on a two-week comparison, worldwide capacity was unchanged, chargeable weight declined **↓4%**, and rates fell **↓4%**, while remaining **↑26%** higher year on year, respectively.

On the N4 corridor, movements increased by around **34 trucks a day**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**). TCM reported that a train carrying 84 magnetite wagons derailed at Sencogene at approximately 10:50 on 19 July, with 12 wagons overturning and four partially overturning, resulting in the closure of the line. Truck volumes through the border post increased to **1,573 HGVs per day** (**↑2%**, w/w). Overall, queue times increased by **an hour** to an average of **~4.6 hours** (**↑28%**, w/w) at the border. The average processing times also increased by **an hour** to an average of **~4.4 hours** (**↑29%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time increased by around **three-quarters of an hour** from last week, as transit time increased by the **same magnitude**. The median border crossing times at South African borders increased by **an hour and a quarter**, averaging **~10 hrs** (**↑15%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) also increased – by about **half an hour**, averaging **~7.5 hrs** (**↑9%**). This week, on average, **the same two** SADC borders again took more than a day to cross, namely Beitbridge and Kasumbalesa (the worst affected, taking around **four days** to cross from the **Zambian side**).

Cross-border developments this week include **(1)** Botswana's introduction of mandatory pre-clearance and "Proceed to Border" requirements from 1 August; **(2)** operational and administrative disruptions at Beitbridge, including scanner downtime and a driver-document incident; and **(3)** temporary transport disruptions in the DRC following a train derailment, alongside an ongoing investigation into the fatal shooting of a Zambian driver in Durban. Lastly, UAOTL/AUTLO has requested an immediate moratorium on enforcement action against foreign drivers employed by South African cross-border transporters, citing recent arrests, vehicle and cargo detentions, and resulting disruptions to regional freight movements.

In summarising this edition, South Africa's rail reform remains central to the broader evolution of the national logistics system. Public comment on the Draft National Rail Master Plan (NRMP) was due yesterday, with the plan providing an important framework for moving beyond isolated operational improvements towards deeper structural reform. Its success will depend on integrating rail with road, ports and regional corridors through inland terminals, multimodal changeover points and freight villages that connect production areas, logistics hubs and trade gateways. These facilities must form part of a coherent national freight logistics plan, supported by aligned infrastructure, data, governance and investment decisions. The objective should be an end-to-end system that improves cost, transit time, schedule integrity and reliability across domestic and international supply chains.

Contents

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 13 to 19 July (measured in TEUs)

7-day flow reported (13/07/2026 – 19/07/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Pier 2)	Since the transition from DCT to DGT, no information has been received.		
New Pier (Pier 1)	1,668	11,675	↓21%
Cape Town Container Terminal	2,309	16,162	↓12%
Ngqura Container Terminal	2,124	14,869	↓18%
Port Elizabeth Container Terminal	711	4,980	↓25%
Other	658	4,605	↑8%
Total	**7,470**	**52,291**	↓16%

Source: Calculated from TPT, 2026. Updated 19/07/2026.

An average of **~7,470 TEUs** (↓16%) was handled per day for the last week (*13 to 19 July, Table 2*). Consequently, throughput was below the projected average of **~7,912 TEUs** (↓6% actual versus projected). For the coming week, an increased average of **~7,867 TEUs** (↑5%) is predicted to be handled (*20 to 26 July, Table 3*).

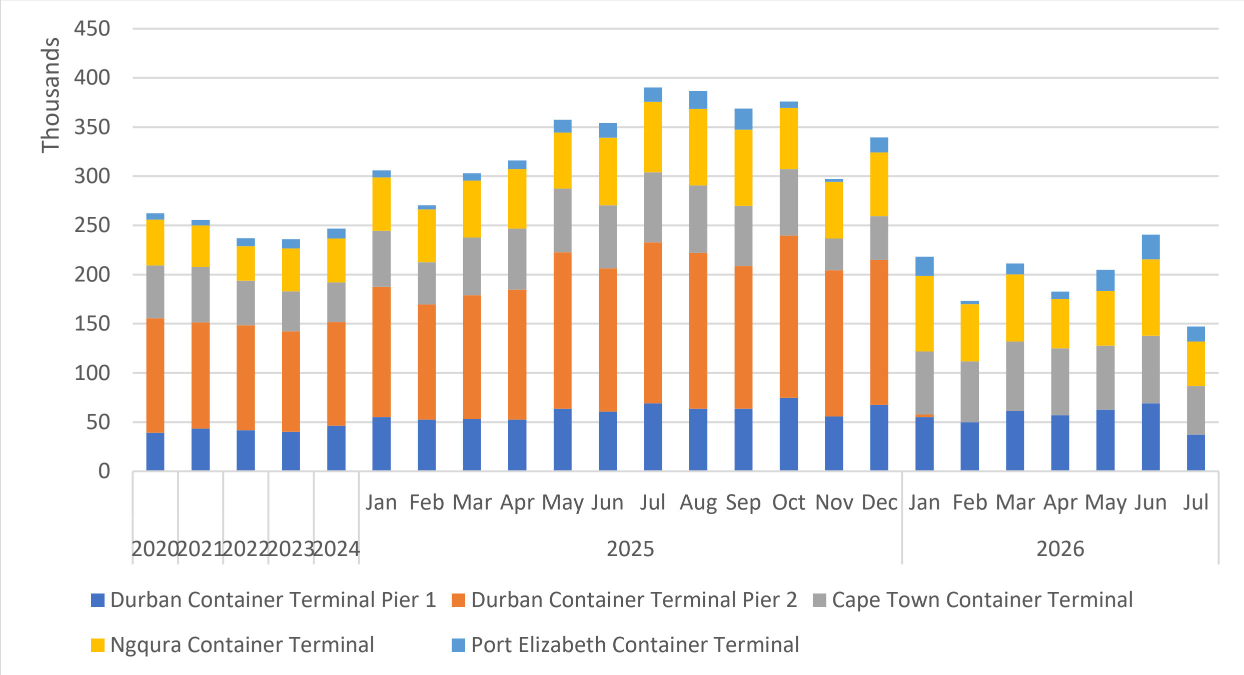
Table 3 – Container Ports – Weekly flow projected for 20 to 26 July (measured in TEUs)

7-day flow projected (20/07/2026 – 26/07/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Pier 2)	Since the transition from DCT to DGT, no information has been received.		
New Pier (Pier 1)	2,015	14,105	↑21%
Cape Town Container Terminal	2,206	15,445	↓4%
Ngqura Container Terminal	2,330	16,310	↑10%
Port Elizabeth Container Terminal	445	3,115	↓37%
Other	870	6,092	↑32%
Total	**7,867**	**55,067**	↑5%

Source: Calculated from TPT, 2026. Updated 19/07/2026.

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.

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



Source: Calculated from TPT, 2026, and updated 19/07/2026.

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 Wednesday afternoon:

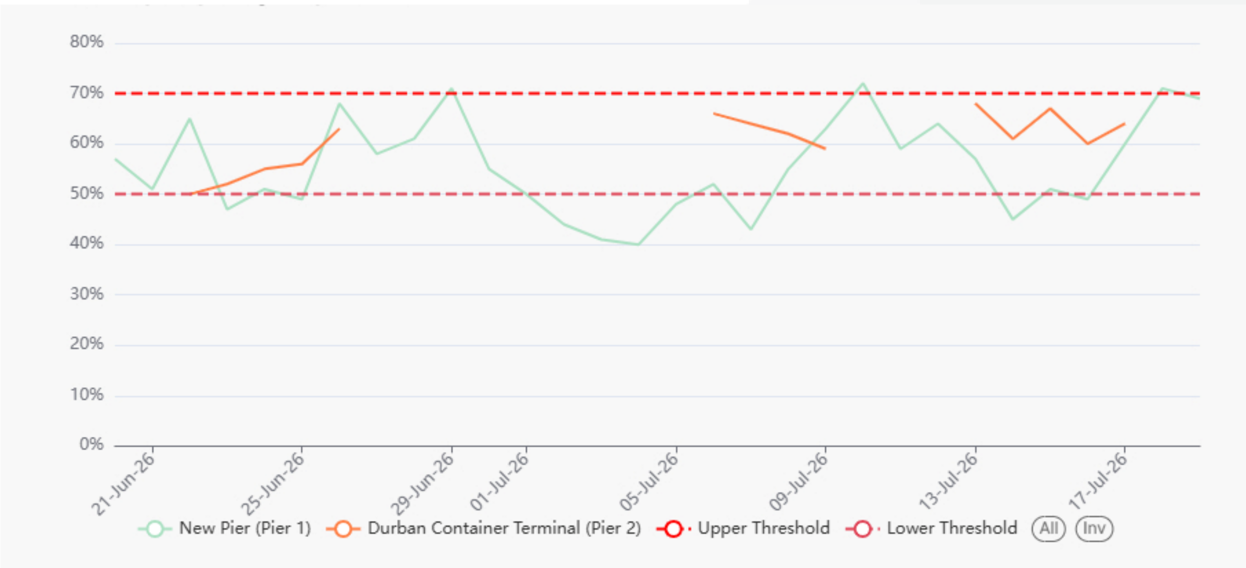
Table 4 – Vessel Dwell Time

Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.5	2.3
Cape Town	FPT	0.8	3.0
Cape Town	MPT	1.6	1.3
Durban	Pier 2	1.3	3.5
Durban	Pier 1	0.9	1.9
East London	MPT	0.2	3.1
Ngqura	NCT	2.4	2.6
Port Elizabeth	PECT	4.4	1.3

Source: Calculated from Marine Traffic AIS data, 2026. Updated 21/07/2026.

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

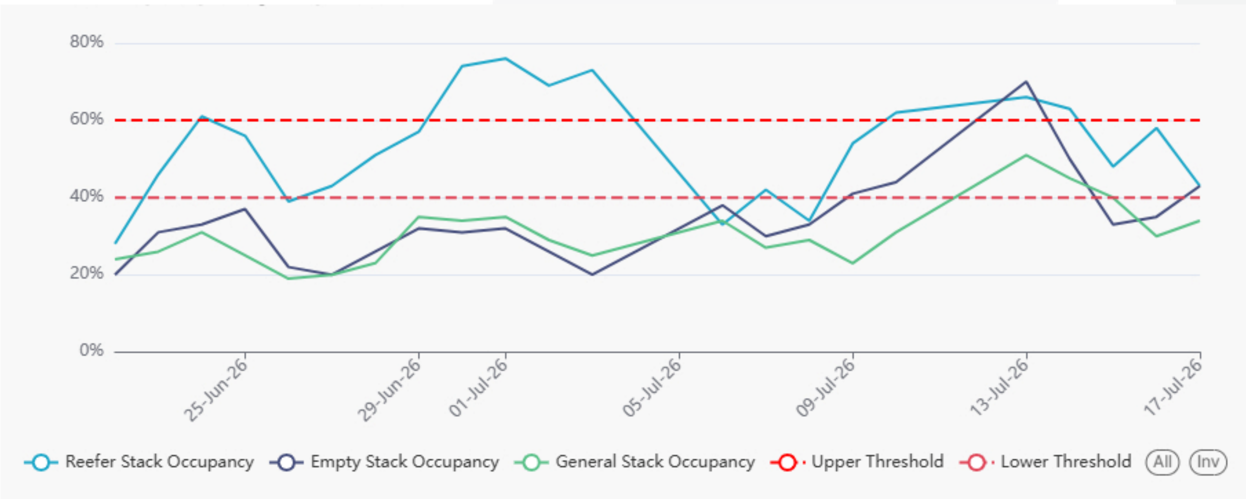
Figure 4 – Stack occupancy in Durban, general-purpose containers (19 June to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 19/07/2026.

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 (19 June to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 19/07/2026.

b. Summary of port operations

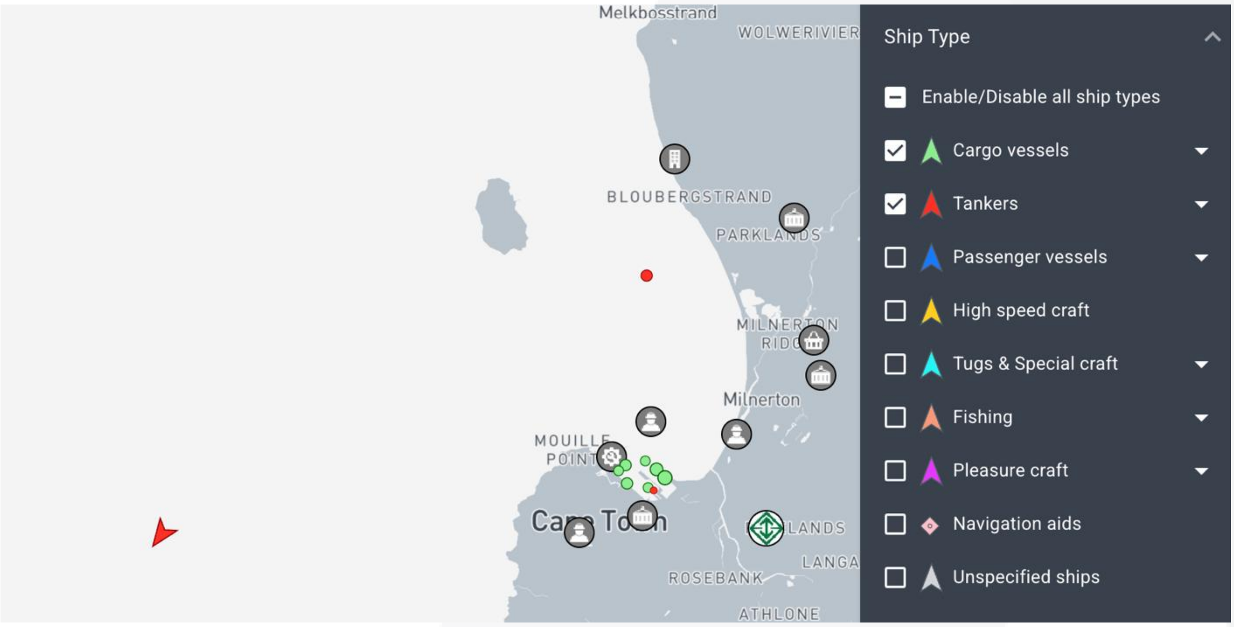
i. Cape Town

Cape Town Container Terminal had a relatively stable week, with a minor decline in waterside volumes from the previous week (though throughput was above the target of 15,801. Vessels spent an average of 9 hours at anchorage and 43 hours at berth; anchorage waiting rose modestly from the 2 hours recorded the previous week, while berth time remained largely unchanged. Operations were briefly interrupted by a windbound stoppage overnight from Monday to Tuesday. Equipment availability remained consistent with an average of seven out of nine cranes and 29 out of 32 RTGs available throughout the week.

Cape Town Multi-Purpose Terminal recorded a significant increase in waterside volumes, increasing to over 1,200 moves from only around 200 the previous week. Vessels spent an average of 10 hours at anchorage and 39 hours at berth. Equipment availability remained consistent with an average of two out of three cranes and three out of five straddle carriers available throughout the week.

For Berth A, the AGL Terminal had no vessel activities as the terminal is busy with some work on the quay side.

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



Source: Marine Traffic. Updated 19/07/2026 at 14:00.

ii. Durban

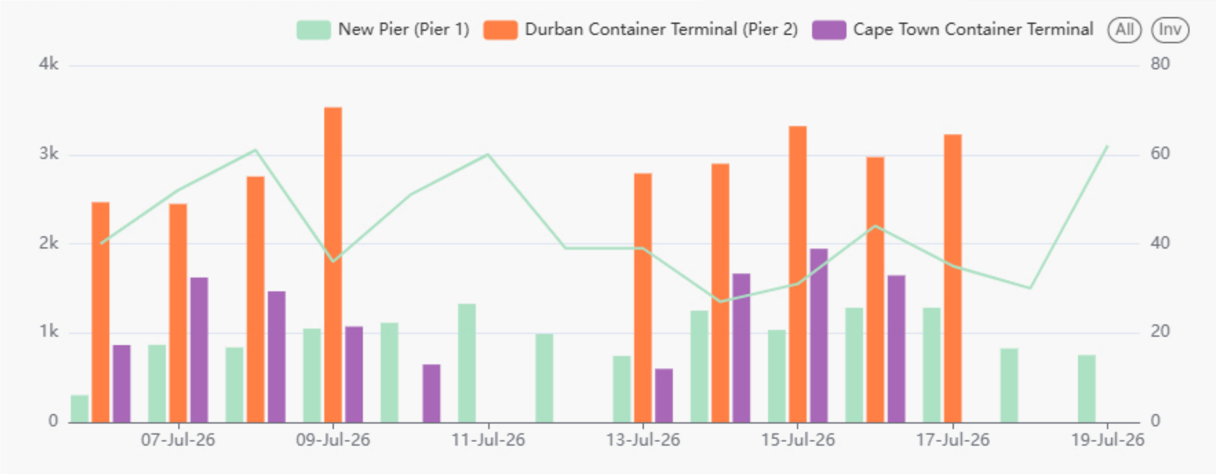
Pier 1 experienced some congestion over the past week, with a reduction in waterside volumes (down by 21%) and an increase in vessel dwell times, with vessels spending an average of 41 hours at anchorage and 67 hours at berth (up from 15 and 49 hours respectively the previous week). Crane availability remained consistent with an average of four out of seven cranes available throughout the week. In contrast to the congestion, RTG availability improved significantly, with an average of 27 RTGs available against the required 25. The **TTT** for the week averaged **~38 minutes** (**↓ 21%**, w/w), and the average **staging time** was **~23 minutes** (**↓ 12%**).

Durban Gateway Terminal's waterside movements showed an estimated increase of **↑48%**, with **3,098 container moves per day** (up from **2,087 the previous week**. Vessel dwell times remained elevated with an average time at anchorage of 77 hours and 109 hours at berth, suggesting that some increased congestion accompanied the increase in waterside operations (see the current congestion and *queue-to-berth* ratio, below in *Section 4*). The private sector continues to raise concerns regarding challenges with the truck booking system and landside operations.

Durban Multi-Purpose Terminal reported a minor increase in waterside volumes, with an improvement in vessel turnaround times, with vessels waiting an average of 33 hours at anchorage and spending 53 hours at berth.

The following figure summarises the performance of Cape Town and Durban's container terminals for the last two weeks, focusing on gate moves and time spent in the terminals, down from 38 hours and 68 hours respectively.

Figure 7 – 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 19/07/2026.

The queue of container vessels waiting outside Durban **was again stable** this week. On Wednesday morning (22 July), **eleven** container vessels were waiting outside at anchorage for Durban. The queue of dry (**one**), liquid (**two**), and breakbulk (**one**) vessels **was stable** from last week:

Figure 8 – Durban vessel view (per vessel group)

Source: Marine Traffic. Updated 19/07/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal reported a decrease in waterside volumes, though total movement remains close to the targeted volumes. Vessels spent an average of 14 hours at anchorage and 36 hours at berth, remaining consistent with the turnaround times reported the previous week. Equipment availability remained consistent, with an average of six out of eight cranes and 25 out of 30 RTGs available throughout the week.

Port Elizabeth Container Terminal reported a 25% reduction in waterside volumes, though the terminal still managed to outperform its target volume, indicating another strong week. Vessels spent an average of 34 hours at berth (a notable increase from 18 hours the previous week) and 30 hours at berth. The terminal reported a strong equipment complement with two out of three cranes operational, and 14 out of the 11 required straddle carriers available, which potentially impacted the strong waterside performance recorded over the past two weeks.

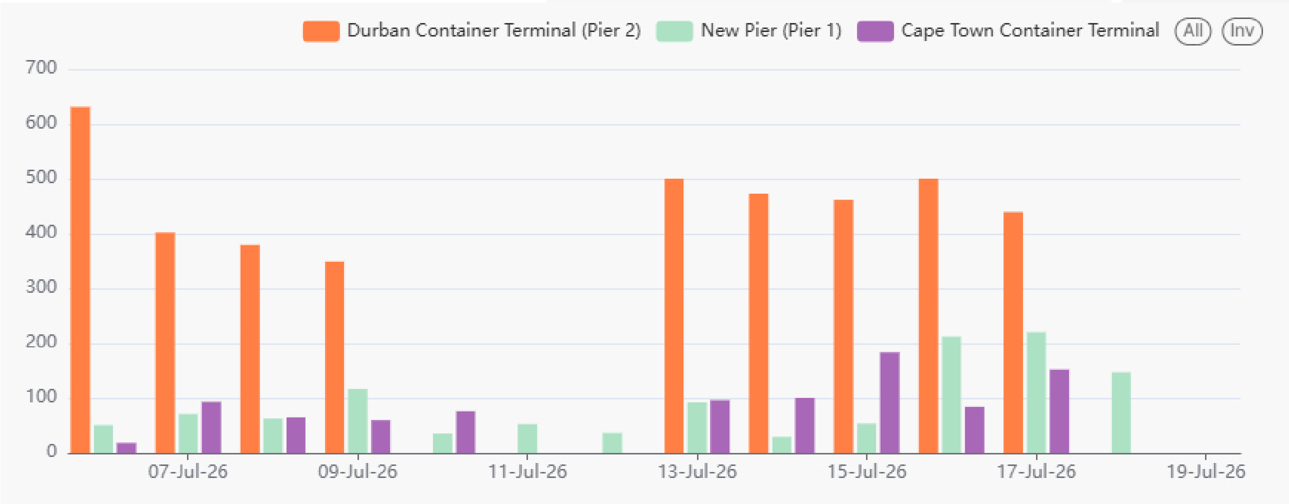
iv. Richards Bay

At RBCT, the daily average coal throughput for the week **increased considerably** and averaged roughly **185,500 tons** (**↑ 13%**, w/w) a day. An average of **23 trains** was serviced on the landside (down from last week's **24**), and **above the target** (**22** trains).

v. Transnet Freight Rail (TFR)

In the last week (*13 to 19 July*), rail cargo on the ConCor line out of Durban was reported at **3,127** containers, up by **↑43%** from the previous week's **2,183** containers.

Figure 9 – TFR: Rail handled (Pier 1, Pier 2, and CTCT)



Source: Calculated using data from Transnet, 2025. Updated 19/07/2026.

2. Air Cargo Update

a. International air cargo

As mentioned last week, the following table shows the inbound and outbound air cargo flows to and from ORTIA for last week (*13 to 19 July*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *July 2025* was **~848,687 kg**.

Table 5 – International inbound and outbound cargo from OR Tambo

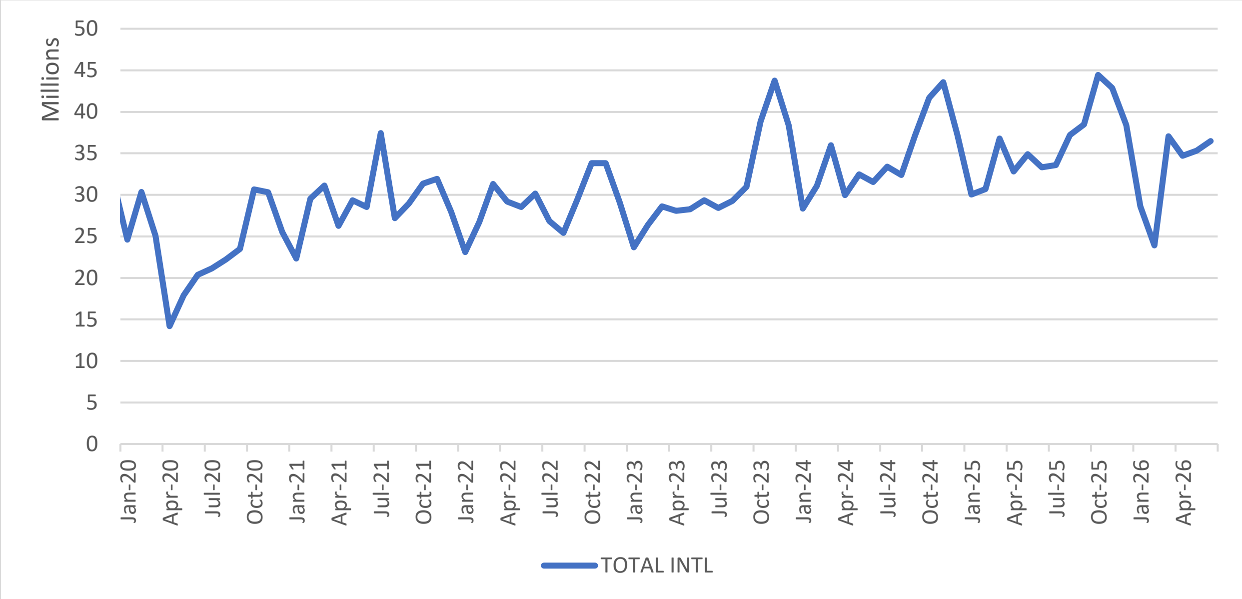
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**606,809**	**4,247,664**	**↑1%**
Volume outbound	**357,811**	**2,504,679**	**↑7%**
Total	**964,620**	**6,752,343**	**↑3%**

Courtesy of ACOC. Updated: 19/07/2026.

International air cargo to ORTIA was stable this week. The daily average amounted to **~607,000 kg** inbound (**↑1%**, w/w) and **~358,000 kg** outbound (**↑↓%**). Current volumes to and from ORTIA remain significantly above the commensurate volumes of July last year (**↑14%**) and also above the pre-pandemic July of 2019 (**↑14%**).

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

Figure 10 – International cargo: All terminals (kg millions)



Calculated from ACOC. Updated: 19/07/2026.

The latest reported fuel stock days (as of Wednesday, 22 July) per airport indicate:

- ORTIA: **10.4 days** (target: 5 days)
- CTIA: **3.9 days** (target: 4 days)
- Durban: **~11.3 days** (target: 5 days)

3. Road and Regional Update

a. Lebombo border post update

In the last week (*13 to 19 July)*, movements increased by around **34 trucks a day**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**). TCM reported that a train carrying 84 magnetite wagons derailed at Sencogene at approximately 10:50 on 19 July, with 12 wagons overturning and four partially overturning, resulting in the closure of the line.

- Truck volumes through the border post increased to **1,573 HGVs per day** (**↑2%**, w/w).
- Overall, queue times increased by **an hour** to an average of **~4.6 hours** (**↑28%**, w/w) at the border.
- The average processing times also increased by **an hour** to an average of **~4.4 hours** (**↑29%**) per crossing.

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

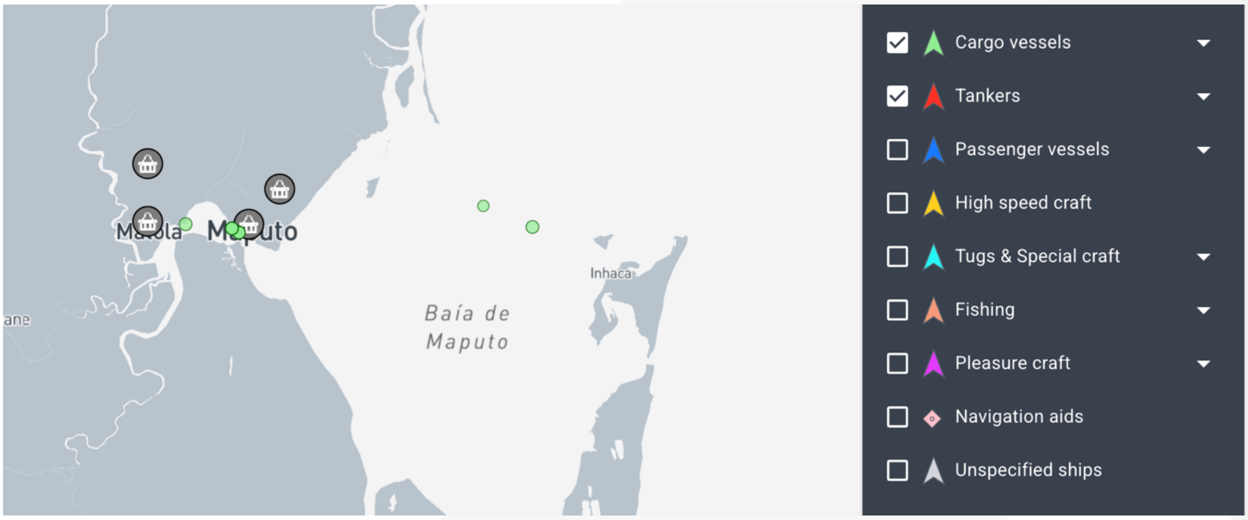
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,573	1,550	1,217	219	31	68	33	243
% (w/w)	**2%**	**2%**	**1%**	**11%**	**-40%**	**7%**	**-17%**	**-7%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 19/07/2026.

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

Figure 11 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 19/07/2026 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 **three-quarters of an hour** from last week, as transit time increased by the **same magnitude**.
- The median border crossing times at South African borders increased by **an hour and a quarter**, averaging **~10 hrs** (**↑15%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) also increased – by about **half an hour**, averaging **~7.5 hrs** (**↑9%**).

1. **Botswana: mandatory pre-clearance requirements:**
   a. From 1 August 2026, the Botswana Unified Revenue Service (BURS) will require customs declarations for all goods entering, exiting or transiting Botswana to be submitted before vehicles proceed to the border.
   b. Declarations must be lodged through the BURS Customs Management System and accompanied by all supporting documentation.
   c. Transporters must wait for a “Proceed to Border” notification before dispatching vehicles to the border.
   d. The measure is intended to increase pre-clearance and reduce the processing of incomplete consignments at border posts.

2. **Beitbridge: driver-document incident:**
    a. A driver reported that a SARS official retained his passport at Beitbridge on 13 July, with the document reportedly still outstanding the following morning.
    b. The matter was escalated to SARS management for intervention.
    c. Industry participants were reminded that officials should not remove or retain drivers' passports or other documentation without a lawful mandate.
3. **Beitbridge: scanner disruption:**
    a. The scanner on the Zimbabwean side of Beitbridge was reportedly unavailable on Saturday.
    b. The disruption resulted in a backlog of commercial vehicles and slower border processing.
4. **Democratic Republic of Congo: Mutaka–Tenke route disruption:**
    a. A cargo-train derailment temporarily obstructed the main road between Mutaka and Tenke.
    b. Approximately 1,000 trucks were reportedly delayed and redirected to truck parks.
    c. The route was cleared and reopened later the same day.
5. **Foreign-driver enforcement and proposed moratorium**
    a. UAOTL/AUTLO reported intensified enforcement action against foreign drivers operating South African-registered vehicles on visitor permits following the 30 June protest action.
    b. Reported consequences include driver arrests and removal from duty, as well as the detention of vehicles and high-value cargo.
    c. The organisation has requested an immediate moratorium to maintain the existing operating position while government and industry develop a longer-term regulatory solution. It further requested that any moratorium be formally communicated to all relevant enforcement agencies to ensure consistent application.
    d. The letter also seeks clarity on whether the Trusted Employer Scheme could provide a lawful and workable compliance framework for cross-border transport operators.

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

Table 7 – Delays[6] summary – South African borders[7] (both directions)

Border Post	Direction	HGV[8] 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	532	25.4	6.0	26.0	15,960	3,724
Beitbridge	Zimbabwe-SA	305	5.5	1.4	5.3	9,150	2,135
Groblersbrug	SA-Botswana	229	11.4	1.3	11.3	6,870	1,603
Martin's Drift	Botswana-SA	156	0.9	0.2	0.6	4,680	1,092
Kopfontein	SA-Botswana	190	10.5	2.1	10.2	5,700	1,330
Tlokweng	Botswana-SA	46	0.7	0.2	0.4	1,380	322
Vioolsdrift	SA-Namibia	30	5.1	1.5	5.1	900	210
Noordoewer	Namibia-SA	20	1.9	0.5	1.5	600	140
Nakop	SA-Namibia	30	4.2	1.1	4.1	900	210
Ariamsvlei	Namibia-SA	20	1.4	0.4	1.2	600	140
Skilpadshek	SA-Botswana	276	14.1	2.4	14.1	8,280	1,932

[6] 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.
[7] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[8] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Border Post	Direction	HGV[8] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Pioneer Gate	Botswana-SA	85	1.8	1.3	1.5	2,550	595
Ramatlabama	SA-Botswana	194	5.2	1.1	5.1	5,820	1,358
Ramatlabama	Botswana-SA	99	0.5	0.1	0.3	2,970	693
Lebombo	SA-Mozambique	1,512	4.6	1.4	4.4	45,360	10,584
Ressano Garcia	Mozambique-SA	1,493	1.9	0.3	1.5	44,790	10,451
Sum/Average		**5,217**	**5.9**	**1.3**	**5.8**	**156,510**	**36,519**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 12/07/2026.

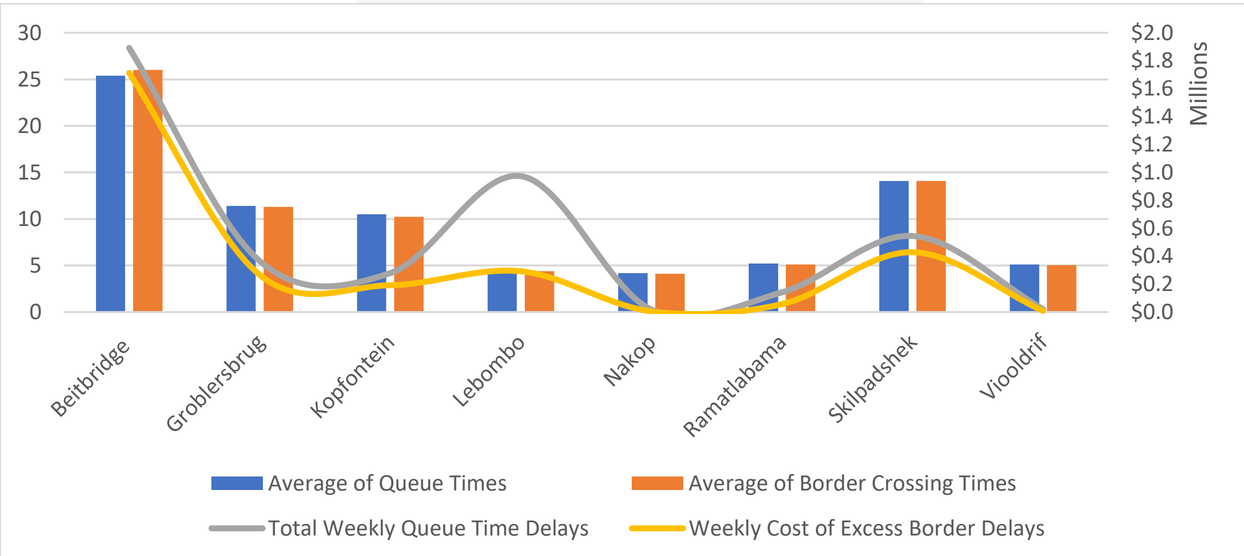
Table 8 – Delays summary – Corridor perspective

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	6.4	2.3	6.2	9,600	2,240
Central Corridor	798	5.2	1.5	5.0	23,940	5,586
Dar Es Salaam Corridor	1,819	21.9	5.3	22.0	54,570	12,733
Maputo Corridor	3,005	3.3	0.9	3.0	90,150	21,035
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,347	15.9	3.6	15.9	100,410	23,429
Northern Corridor	2,817	1.9	0.3	1.0	92,520	21,588
WBNLD Corridor	920	4.6	1.0	4.4	27,600	6,440
Trans Cunene Corridor	100	3.2	0.9	3.0	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	14.1	3.2	14.1	3,480	812
Sum/Average	**13,469**	**8.0**	**1.9**	**7.8**	**412,080**	**96,152**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 12/07/2026.

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

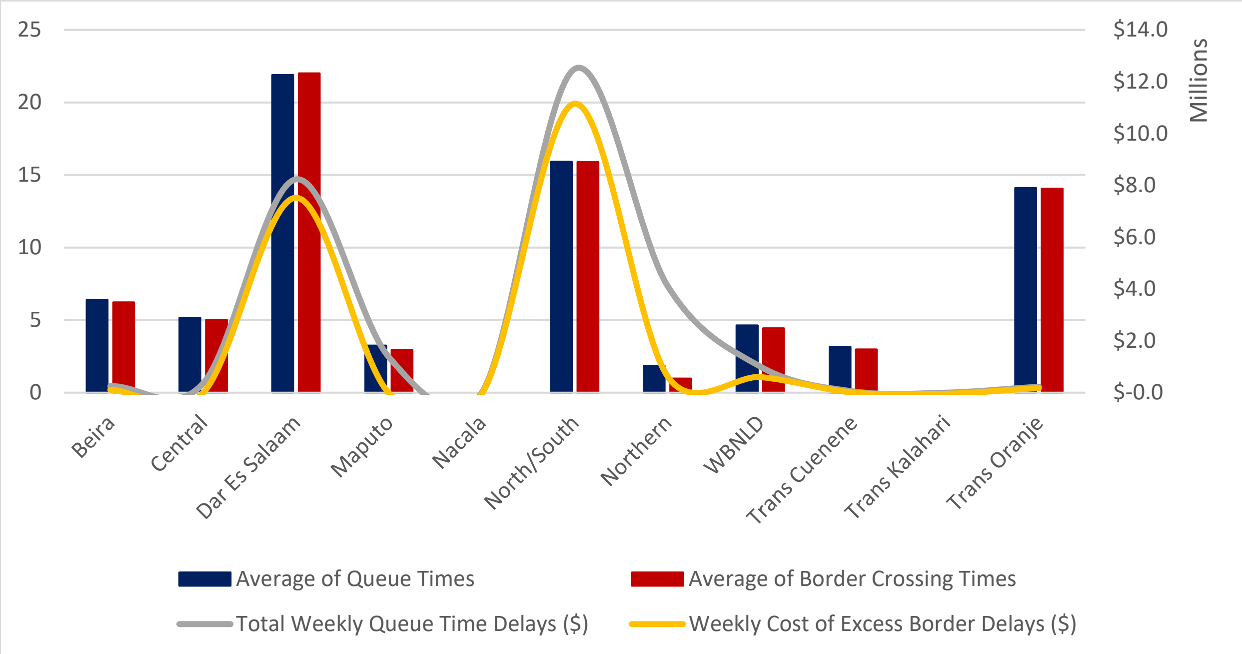
Figure 12 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 12/07/2026.

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

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



Source: Calculated from TransAfricaBorder & Crickmay, week ending 12/07/2026.

In summary, cross-border queue time averaged **~8 hours** (up by **~0.7 hours** from the previous week's **~7.3 hours**), indirectly costing the transport industry an estimated **$28.1 million** (**R463 million**). Furthermore, the week's average cross-border transit times hovered around **~7.8 hours** (up by **~0.7 hours** from the **~7.1 hours** recorded in the previous report), at an indirect cost to the transport industry of **$20.1 million** (**R331 million**). The total indirect cost for the week amounts to an estimated **~$48.2 million** (**R794 million**, up by **↑37%** from the **~R578 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.

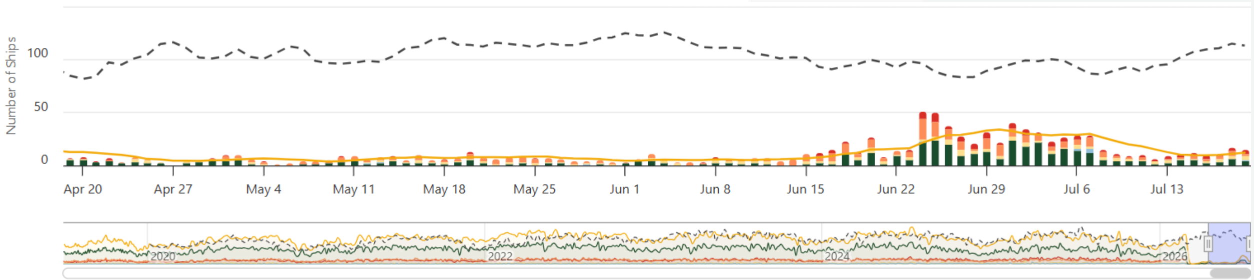
a. Global shipping industry

i. Strait of Hormuz update

Middle East maritime risks intensified as the United States conducted an eleventh consecutive night of strikes on Iranian military infrastructure. Commercial traffic through the Strait of Hormuz remains constrained, while Houthi threats in the Bab el-Mandeb forced two Saudi crude tankers bound for Asia to reverse course. The simultaneous disruption of both strategic chokepoints is tightening vessel availability, raising insurance and freight costs, and extending voyages. Elevated oil prices increase fuel-cost risks for South Africa, although physical supply remains uninterrupted.

In the last 7 days (to 19 July), the average number of ship arrivals through the Strait of Hormuz was **14 vessels per day** (all types).

Figure 14 – Strait of Hormuz: Ship Arrivals



Source: [IMF/Oxford Port Watch](), updated 19 July

ii. Global liner network and port congestion

The renewed military conflict in the Persian Gulf kept the Strait of Hormuz relatively quiet last week, but Maersk and CMA CGM have continued to send their ships through the Red Sea despite the increased risk of Houthi attacks. Although only 24 containerships remain idle in the Persian Gulf with a total capacity of **69,000 TEU**, there is a growing number of Iranian ships that are stranded in various Asian anchorages that have been added to the idle fleet. The rising tensions are giving container freight rate futures a renewed boost as bunker fuel prices have risen by **↑20%** over the last 2 weeks.[9]

Capacity remains tight with extra loader demand on both Asia-Europe and US West Coast still intact despite the recent correction in spot freight rates. Port congestion across East Asia remains elevated as vessels delayed by Typhoon Bavi last week are still being cleared even as new arrivals result in further vessel bunching. Shanghai/Ningbo currently has a *queue-to-berth ratio* of **2.43**. Durban (entire port) trended at a *queue-to-berth ratio* of **1.00** on 19 July.

Figure 15 – Port Congestion Watch

Source: [Linerlytica](), updated 19 July

[9] Linerlytica. 20/07/2026. [Market Pulse – Week 29]().

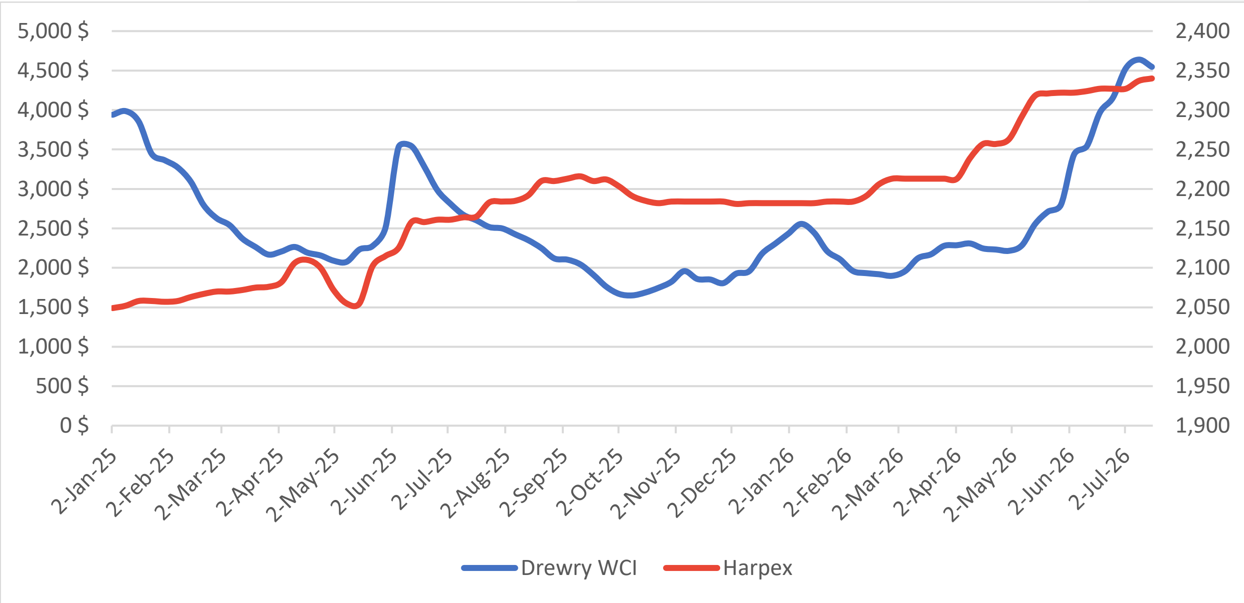
iii. Container freight rates

Drewry's *World Container Index* (WCI) declined by **↓2%** to **$4,547 per 40-foot container** in the week ending 16 July, following a **↑2%** increase to a 22-month high of **$4,639** the previous week. The marginal correction suggests that the sharp peak-season increase is stabilising, although global spot rates remain elevated amid capacity constraints and geopolitical disruption.

Container-ship charter rates remained firm and broadly stable in the week ending 17 July 2026. The HARPEX increased marginally from **2,337 to 2,340 points** (**↑0.1%**), with daily rates for **1,700-TEU vessels** rising from **$30,000 to $30,500** and **1,800-TEU vessels** from **$33,500 to $34,000**; all other assessed vessel classes were unchanged.

Charter and spot rates have finally converged in the last two weeks, as illustrated by the figure showing the two from the start of last year:

Figure 16 – Drewry WCI ($/40ft) & Harper Petersen Index

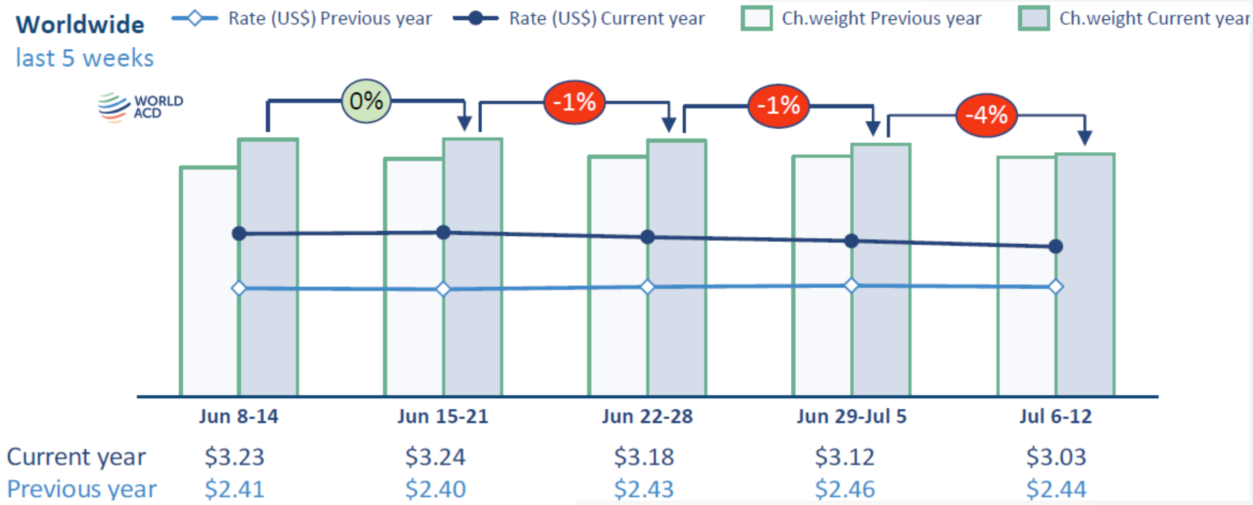


Source: Calculated from Drewry & Harpex

b. Global air cargo industry

The latest weekly data from WorldACD show that worldwide air cargo demand softened in week 28 (6–12 July), with global chargeable weight down **↓4%** (w/w), while average rates fell **↓3%** to **$3.03/kg** – the third consecutive weekly decline – yet remained **↑24%** above last year. Global spot rates also dropped **↓3%** to **$3.47/kg**, still **↑32%** higher year on year.

Figure 17 – Chargeable weight and rates (past five weeks)



Source: WorldACD

On a two-week-over-two-week basis, worldwide capacity was broadly flat, chargeable weight fell **↓4%**, and rates declined **↓4%**; compared with the same period in 2025, capacity was **↑2% higher**, chargeable weight **↑3% higher**, and rates **↑26% higher**. The weekly contraction was led by a **↓7%** fall in Asia-Pacific-origin tonnage, including a **↓10%** decline to Europe, while Middle East and South Asia origin volumes fell **↓4%**. Typhoon disruption, EU de minimis changes and renewed US–Iran tensions weighed on flows.

ENDS[10]

[10] ***ACKNOWLEDGEMENT:*** *This initiative –* ***The Cargo Movement Update*** *– was developed collectively by the Private Sector at large to provide visibility of the movement of goods during the COVID-19 pandemic. The report is authored by the Southern African Association of Freight Forwarders (SAAFF) and distributed by Business Unity South Africa (BUSA). SAAFF acknowledges the input of several key business partners and associations in compiling these reports, which have become a weekly industry staple.*