Authored by:
www.saaff.org.za

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# Cargo Movement Update #278[1]

## ***Date: 19 April 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)** | 20,781 | 23,676 | **44,457** | 22,146 | 25,231 | **47,377** | ↓6% |
| **Air Cargo (tons)** | 3,993 | 2,813 | **6,806** | 4,006 | 2,250 | **6,256** | ↑9% |

## Monthly Snapshot

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

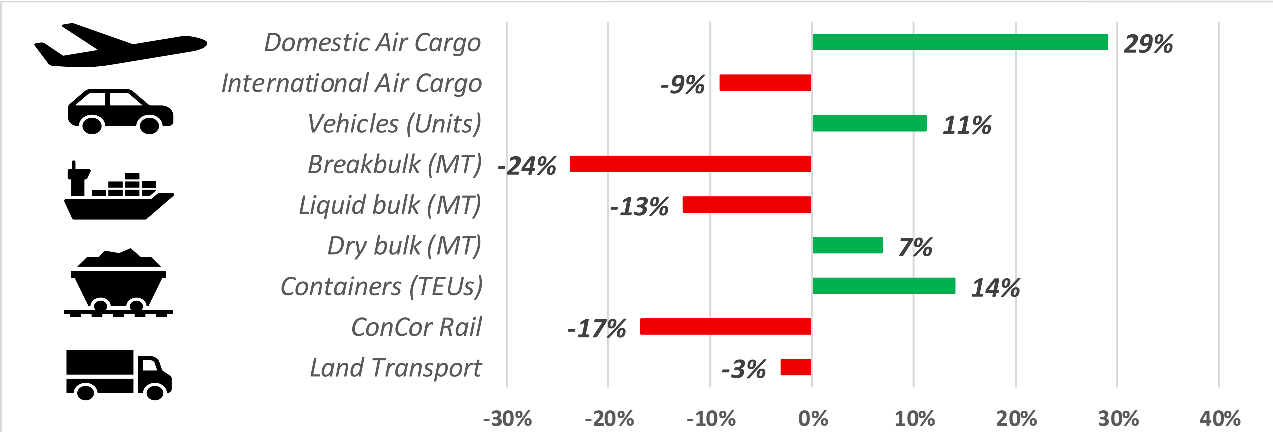
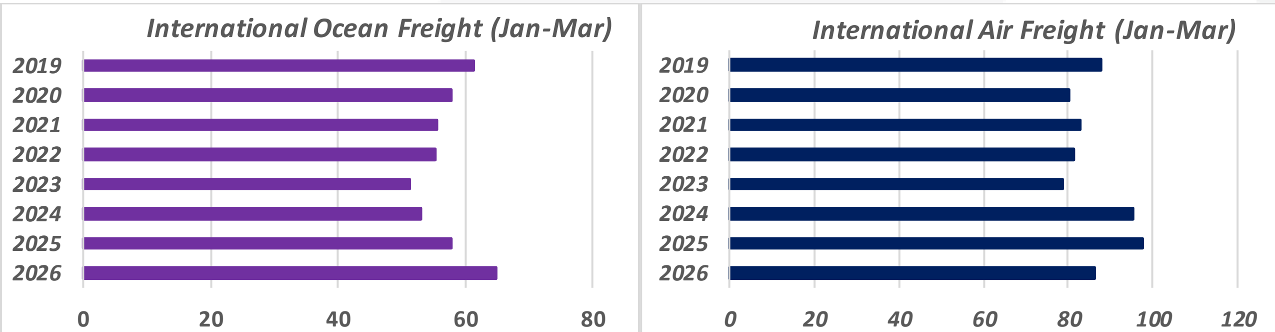



*Figure 2 – Year-to-date flows 2019-2026[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)*




## Key Notes

- An average of **6,351**[6] **TEUs** were handled per day, with **7,725 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2,534** containers, up by ↑19% from last week.
- Cross-border queue: **↓0.4 hrs**; transit: **↓0.8 hrs**; SA borders: **~8 hrs** (**↓23%**); SADC: **~6.1 hrs** (**↓9%**).
- Global reefer capacity among the top 10 carriers grew by **↑7.9%** year-on-year in April 2025.
- After six weeks of surges, container rates are down by **↑2,7%** (or **$63**) to **$2,246**.
- Air cargo spot rates are up by **↑3%** (w/w) to **$3.76/kg**, as global tonnages contracted by **↓6%** (w/w).

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *278th* 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: Mar vs. Mar.
[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.
[6] Figures for this week onward exclude volumes handled by DGT, as the data were not available at the time of reporting

# 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 **6,351 TEUs** was handled daily, a decrease from **6,768 TEUs** the previous week.

Port operations fluctuated across the country, with lower volumes in the Western Cape, despite improved weather conditions, while weather delays and berth maintenance led to lower volumes in Ngqura. Maintenance in the Eastern Cape extended to Port Elizabeth, with one of the three cranes still out of commission. In Durban, Pier 1 and MPT reported an increase in volumes, following a few slow weeks.

Global shipping conditions remain highly unstable, driven by escalating geopolitical disruption and uneven market fundamentals.

The Strait of Hormuz has effectively shifted to a conditionally accessible corridor, with only **~35 vessels recently transiting under extreme risk conditions**, while at least **28 ships have been redirected** and multiple units remain effectively stranded or delayed in the Gulf. Security risks have intensified further, with at least two boxships seized and additional vessels attacked, reinforcing a pattern of direct intervention and militarisation. Carriers are increasingly adopting non-standard operating practices, including AIS suppression, reflecting a breakdown in conventional maritime governance and materially constraining effective capacity.

At the same time, fleet composition continues to evolve, with reefer capacity expanding by **↑7.9%** (y/y), led by aggressive investment from major carriers, indicating sustained demand for temperature-controlled cargo. Freight rates, after several weeks of increases, remain broadly stable (**↑2.7%**, w/w; **↑2%**, y/y), but forward risk is skewed upward. Drewry highlights deteriorating schedule reliability, longer lead times, and potential port omissions, suggesting continued operational fragility across global liner networks.

This week's international cargo flows rebounded nicely after last week – especially with outbound cargoes. The daily average amounted to **~570,000 kg** inbound (**↓0.3%**, w/w) and **~402,000 kg** outbound (**↑25%**). Current volumes to and from ORTIA are nonetheless still above the commensurate volumes of April last year (**↑6%**) and almost at the same level as pre-pandemic April of 2019 (**↓0.2%**).

The US Transportation Security Administration (TSA) will conduct aviation security assessments in Johannesburg (1–5 June 2026) and Cape Town (8–11 June 2026), covering airports, airlines, cargo operators, and technical services. Site visits to Regulated Agents and Known Consignors are also planned, with facility selection remaining at the TSA's discretion.

International air cargo rates continued to strengthen (**↑3%**, w/w; **↑37%**, y/y to **$3.76/kg**) despite weakening demand, with global tonnages declining (**↓6%**, w/w). Capacity recovery persists (**↑1%**, w/w), led by MESA markets, although constraints remain. Elevated rates reflect ongoing geopolitical disruption, modal spillover from ocean freight, and sustained fuel cost pressures.

On the N4 corridor, movements decreased for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **2 trains per day**) slightly increased for the week. Truck volumes through the border post decreased to around **1,472 HGVs per day** (**↓3%**, w/w). Overall, queue times decreased to an average of **~3.1 hours** (**↓14%**) at the border. The average processing times also decreased to an average of **~3.1 hours** (**↓9%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time decreased by approximately **half an hour** from last week, as transit time decreased by approximately **three-quarters of**

**an hour**. The median border crossing times at South African borders decreased by more than **two hours** on average, averaging **~8 hrs** (**↓23%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased by **half an hour**, averaging **~6.1 hrs** (**↓9%**). This week, on average, **only one** SADC border took more than a day to cross, namely Kasumbalesa (the worst affected, taking around **five days** to cross from the **Zambian side**).

Cross-border developments this week include **(1)** heightened security and resulting delays at Beitbridge following the interception of explosives, **(2)** new ZIMRA duty thresholds and clearance provisions aimed at curbing smuggling but with operational implications, and **(3)** Temporary outages at Ramatlhabama.

South Africa's trade, transport, and logistics industry has come a long way since the dire straits immediately post-pandemic; volumes bottomed out two years ago and have begun recovering across rail and ports, albeit gradually. Operation Vulindlela provided feedback this week, with notable progress in **(1)** advancing the restructuring of Transnet, including steps toward an independent National Ports Authority, **(2)** early implementation of open access through the allocation of rail capacity to private operators, and **(3)** institutional progress with the Transport Economic Regulator entering its initial phase. However, material gaps remain, particularly in **(1)** the pace and certainty of PSP execution across key corridors and terminals, **(2)** the absence of fully transparent, cost-reflective access tariffs and consistent network statements, and **(3)** limited progress on data-sharing and system-wide coordination. Sustained reform now requires sharper execution discipline, regulatory clarity, and aligned public–private collaboration to translate policy progress into tangible performance gains.

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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:

*Table 2 – Container Ports – Weekly flow reported for 13 to 19 April (measured in TEUs)*

| 7-day flow reported (13/04/2026 – 19/04/2026) | | | |
|---|---|---|---|
| **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)** | 1,914 | 13,398 | **↑5%** |
| **Cape Town Container Terminal** | 2,147 | 15,026 | **↓18%** |
| **Ngqura Container Terminal** | 1,617 | 11,321 | **↓11%** |
| **Port Elizabeth Container Terminal** | 255 | 1,785 | **↑12%** |
| **Other** | 418 | 2,927 | **↑51%** |
| **Total** | **6,351** | **44,457** | **↓6%** |

*Source: Calculated from TPT, 2026. Updated 19/04/2026.*

An average of **~6,351 TEUs** (**↓6%**) was handled per day for the last week (*13 to 19 April, **Error! Reference source not found.***). Consequently, throughput was below the projected average of **~6,641 TEUs** (**↓4%** actual versus projected). For the coming week, an increased average of **~7,725 TEUs** (**↑22%**) is predicted to be handled (*13 to 19 April*, *Table 3*).

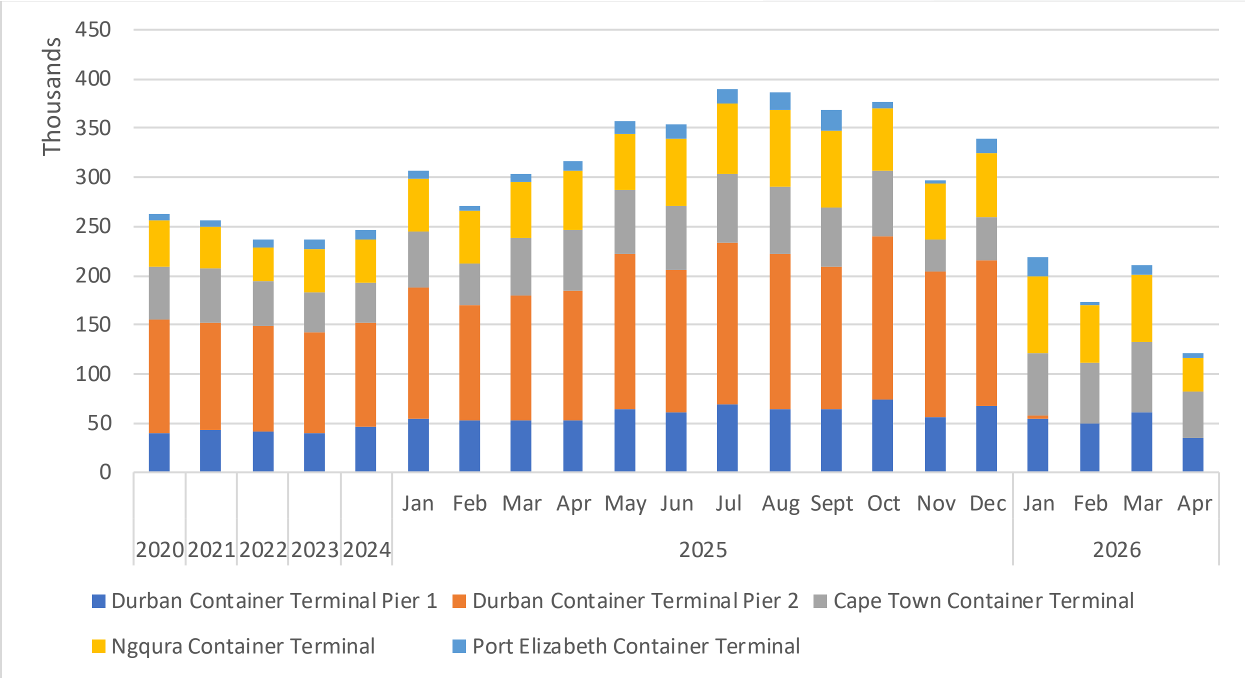
*Table 3 – Container Ports – Weekly flow projected for 20 to 26 April (measured in TEUs)*

| 7-day flow projected (20/04/2026 – 26/04/2026) | | | |
|---|---|---|---|
| **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)** | 1,903 | 13,318 | **↓1%** |
| **Cape Town Container Terminal** | 2,142 | 14,996 | **↓0.2%** |
| **Ngqura Container Terminal** | 2,372 | 16,605 | **↑47%** |
| **Port Elizabeth Container Terminal** | 393 | 2,753 | **↑54%** |
| **Other** | 915 | 6,403 | **↑119%** |
| **Total** | **7,725** | **54,075** | **↑22%** |

*Source: Calculated from TPT, 2026. Updated 19/04/2026.*

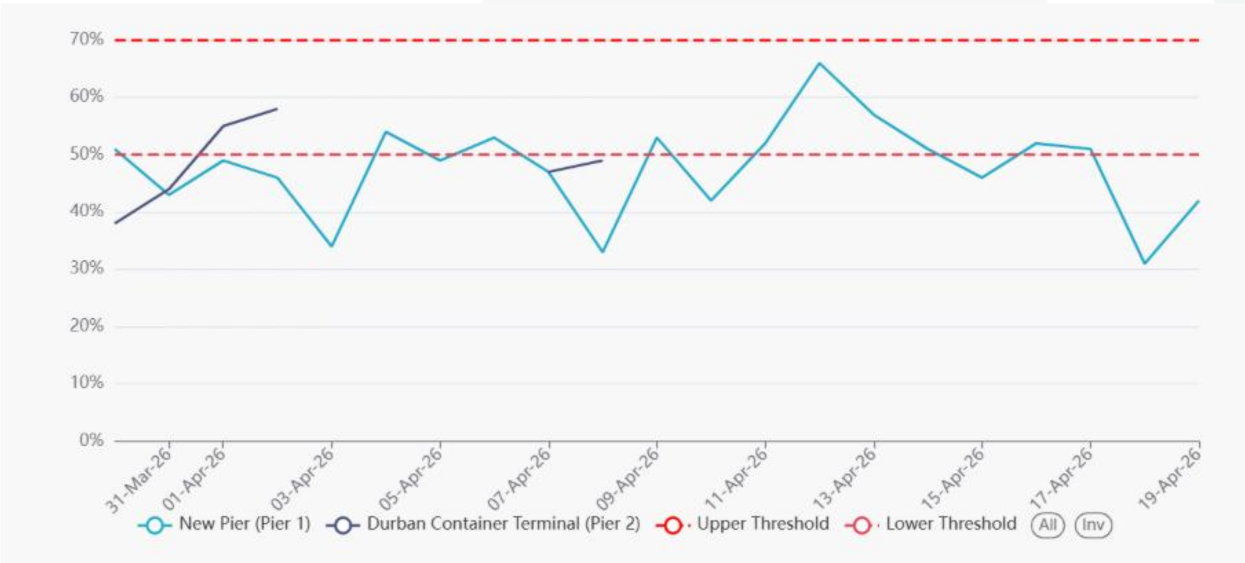
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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




*Source: Calculated from TPT, 2026, and updated 19/04/2026.*

*Figure 4 – Stack occupancy in Durban, general-purpose containers (28 March to present; day on the day)*




*Source: Calculated using data from Transnet, 2026, and updated 19/04/2026.*

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 (28 March to present, day on day)*


*Source: Calculated using data from Transnet, 2026, and updated 19/04/2026.*

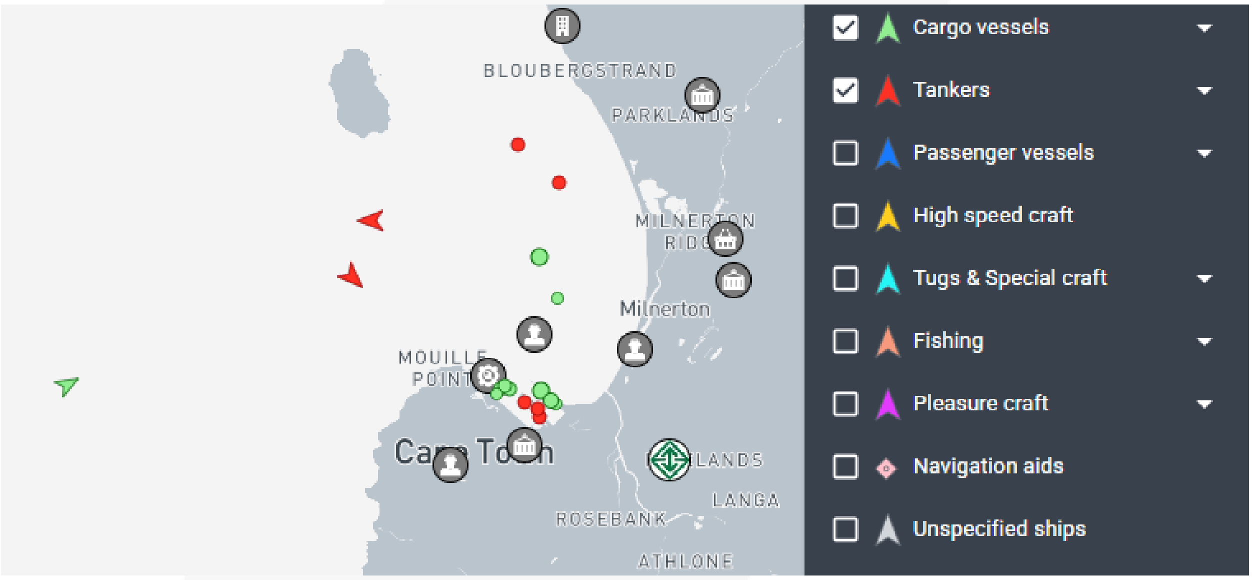
## b. Summary of port operations

### i. Cape Town

CTCT showed a reduction in volumes, although the terminal did not report significant weather delays. The terminal had one or two vessels on anchorage throughout the week (waiting an average of 17 hours at anchorage). The terminal had around 8 vessel calls throughout the week, with an average of two to three vessels at berth (spending around 55 hours at berth). 8 calls. An average of eight out of 9 cranes and 28 out of 32 RTGs were reported throughout the week.

The Cape Town Multi-Purpose Terminal had a slow week, despite more favourable weather conditions, with volumes down by 4%. The terminal had two vessel calls, one of which berthed on arrival (the other waiting less than five hours). On average, the vessels spent around 20 hours at berth. The coming week is estimated to be similarly quiet.

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




*Source: Marine Traffic. Updated 19/04/2026 at 14:00.*

### ii. Durban

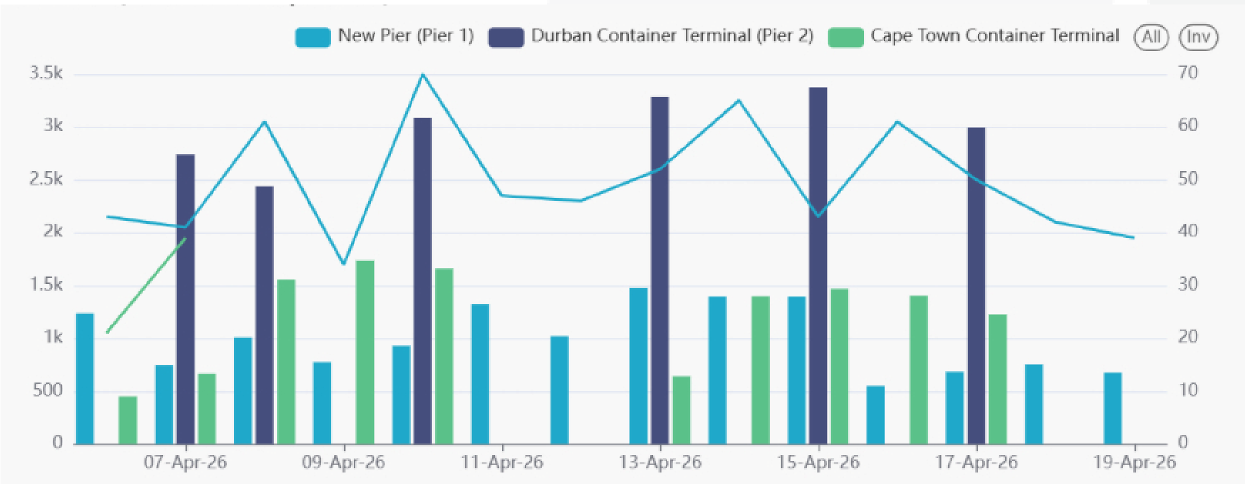
Pier 1 showed a slight increase in volumes, with five vessel calls throughout the week. The vessels had an average time at anchorage of 43 hours and 39 hours at berth. Throughout the week, equipment availability remains consistent with previous weeks, with an average of five out of seven cranes and 15 out of 25 RTGs. The **TTT** for the week averaged **~50 minutes** (**↑2%**, w/w), and the average **staging time** was **~28 minutes** (**↓3%**).

Durban Gateway Terminal had around 5 vessel calls throughout the week, with an average of one vessel at berth. Time waiting at anchorage was around 14 hours, with time at berth at around 72 hours. Throughout the week, the terminal reported an average of 11 out of 15 cranes.

The Durban Multi-Purpose Terminal's performance has been turning up, with **over 2,000 TEUs** (up nearly **↑150%**, w/w). The terminal had three vessel calls throughout the week, with vessels berthing on arrival, and working for around 30 hours.

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.

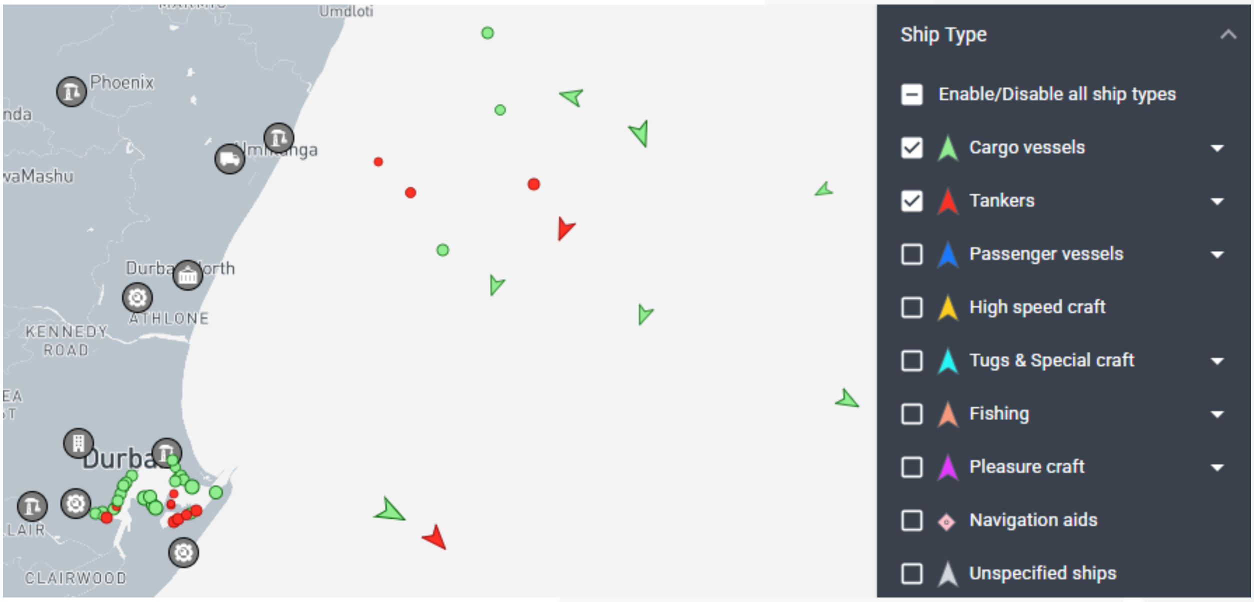
*Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)*




*Source: Calculated using data from Transnet, 2026, and updated 19/04/2026.*

The queue of container vessels waiting outside Durban **was stable** this week. On Wednesday afternoon (22 April), **two** container vessels were waiting outside at anchorage for Durban, **one** for Pier 1 and **one** for DGT. The queue of dry (**zero**), liquid (**two**), and breakbulk (**zero**) **all decreased** from last week:

*Figure 8 – Durban vessel view (per vessel group)*




*Source: Marine Traffic. Updated 19/04/2026 at 14:00.*

### iii. Eastern Cape

Ngqura Container Terminal had an anticipated reduction of volumes, while one of the three berths remains out of operation due to maintenance. These delays were aggravated by weather delays throughout the week. The terminal had six vessel calls through the week, with vessels waiting around 7 hours at anchorage and spending 37 hours at berth. The terminal reported six out of eight cranes and 25 out of 30 RTGs available throughout the week, on average.

Port Elizabeth Container Terminal showed an increase in volumes, despite weather delays throughout the week. The terminal had around four vessel calls waiting around 6 hours at anchorage, then spending 28 hours at berth. The terminal reported two out of three cranes and 9 out of 11 straddles available on average throughout the week. The third crane is estimated to return to operations within the coming week.

### iv. Richards Bay

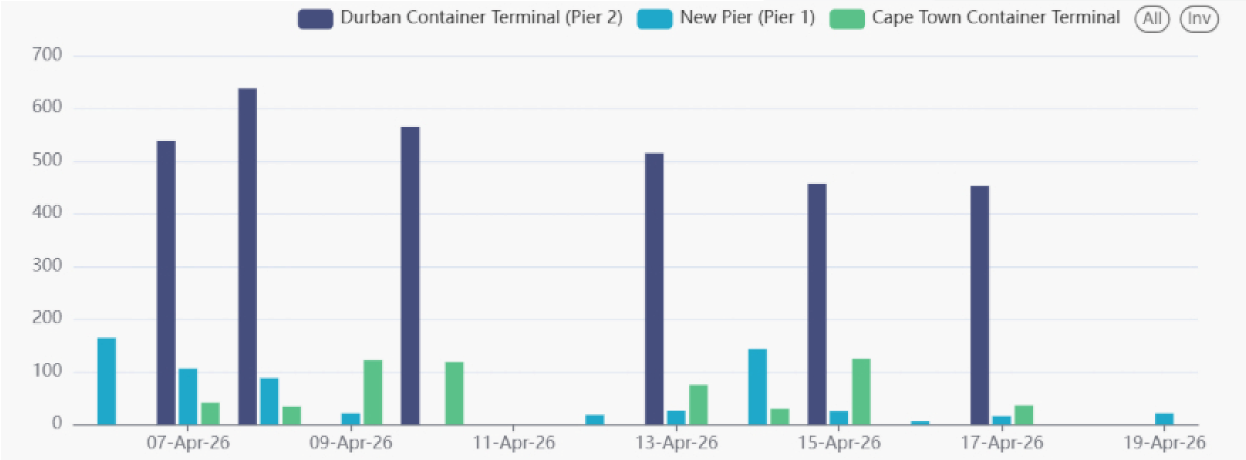
The daily average coal throughput for the week **increased** and averaged around **144,000 tons** (**↑6%**, w/w) a day. An average of **19 trains** was serviced on the landside (**down** from last week's **20**), and **slightly below** the target (of **22** trains).

### v. Transnet Freight Rail (TFR)

In the last week (*13 to 19 April*), rail cargo on the ConCor line out of Durban was reported at **2,534** containers, up by **↑19%** from the previous week's **1,184** containers.

Some rail delays are anticipated for the coming week due to loco shortages in Botswana, meaning that there could be a shortage of wagons and delayed movement on the line.

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




*Source: Calculated using data from Transnet, 2025. Updated 19/04/2026.*

## 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 week (*13 to 19 April*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *April 2025* averaged **~839,596 kg**.

*Table 4 – International inbound and outbound cargo from OR Tambo*

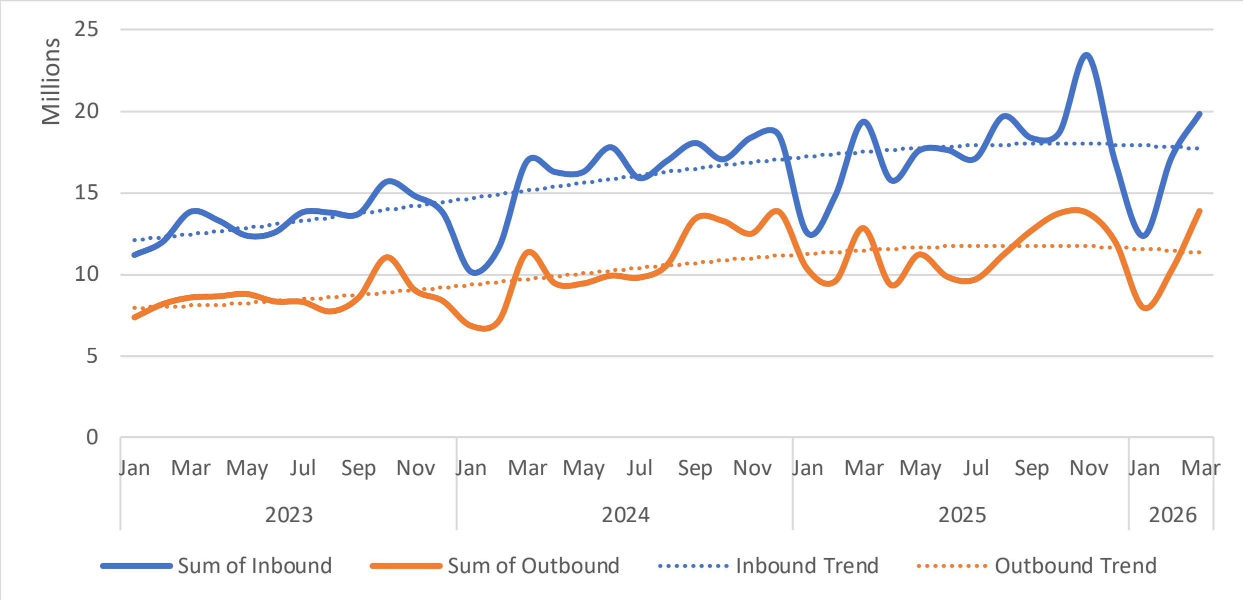
| Flows | Daily Ave. | Weekly Vol. | Change (w/w) |
|---|---|---|---|
| Volume inbound | 570,411 | 3,992,877 | ↓0.3% |
| Volume outbound | 401,826 | 2,812,784 | ↑25% |
| Total | 972,237 | 6,805,661 | ↑9% |

*Courtesy of ACOC. Updated: 19/04/2026.*

This week's international cargo flows rebounded nicely after last week – especially with outbound cargoes. The daily average amounted to **~570,000 kg** inbound (**↓0.3%**, w/w) and **~402,000 kg** outbound (**↑25%**). Current volumes to and from ORTIA are nonetheless still above the commensurate volumes of April last year (**↑6%**) and almost at the same level as pre-pandemic April of 2019 (**↓0.2%**).

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

*Figure 10 – International cargo: ORTIA (kg millions)*




*Calculated from ACOC. Updated: 19/04/2026.*

The US Transportation Security Administration (TSA) has confirmed a scheduled assessment visit to South Africa, with inspections planned at Johannesburg (1–5 June 2026) and Cape Town (8–11 June 2026). The programme will encompass a comprehensive review of key aviation and cargo handling stakeholders, including airport authorities, major international carriers such as Delta Air Lines, United Airlines, and Qatar Airways Cargo, as well as integrators including FedEx. Additional focus areas include mail handling, catering operations, and technical service providers such as South African Airways and Safair. The TSA has further requested site visits to off-airport Regulated Agents and Known Consignors on 2, 4, and 9 June 2026; while local authorities will propose suitable facilities, final selection remains at the discretion of the TSA.

## 3. Road and Regional Update

### a. Lebombo border post update

In the last week (*13 to 19 April*), movements decreased for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **2 trains per day**) slightly increased for the week.

- Truck volumes through the border post decreased to around **1,472 HGVs per day** (**↓3%**, w/w).
- Overall, queue times decreased to an average of **~3.1 hours** (**↓14%**) at the border.
- The average processing times also decreased to an average of **~3.1 hours** (**↓9%**) per crossing.

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

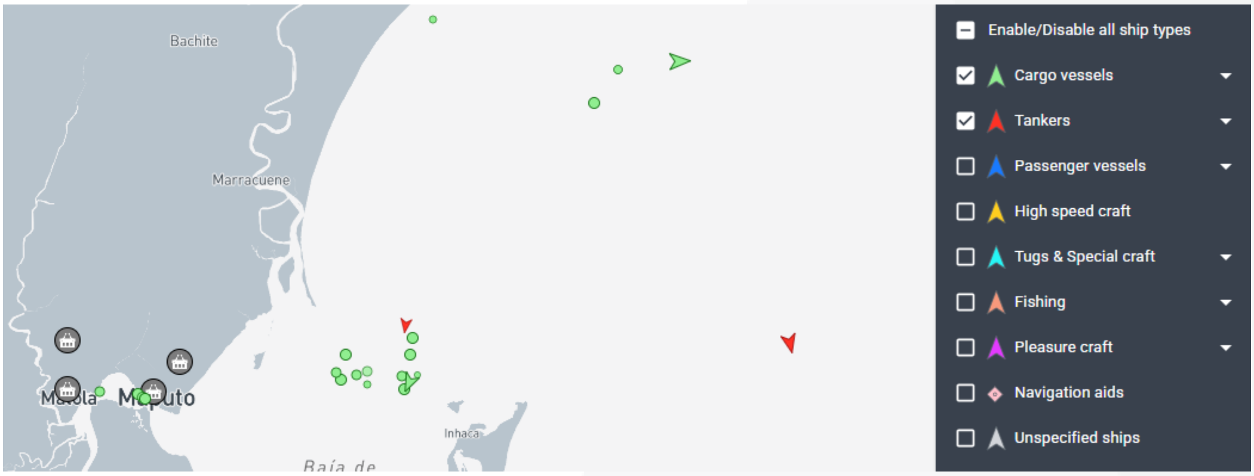
*Table 5* – Lebombo border post update

| | Trucks Entering KM4 | Trucks Exit KM4 | Mineral Trucks | General Cargo | Micro Importers | Export (full) | Fuel Tankers | Trucks staging in KM4 |
|---|---|---|---|---|---|---|---|---|
| Average | 1,472 | 1,416 | 1,073 | 234 | 50 | 80 | 56 | 265 |
| % (w/w) | **-3%** | **1%** | **-5%** | **18%** | **-12%** | **-146%** | **5%** | **12%** |

*Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 19/04/2026.*

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 13/04/2026 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 decreased by approximately **half an hour** from last week, as transit time decreased by approximately **three-quarters of an hour**.
- The median border crossing times at South African borders decreased by more than **two hours** on average, averaging **~8 hrs** (**↓23%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased by **half an hour**, averaging **~6.1 hrs** (**↓9%**).

1. **Beitbridge (South Africa–Zimbabwe):**
    a. Heightened security measures followed the interception of a truck carrying explosives on 10 April, resulting in increased inspection intensity, longer queues, and extended border crossing times.
2. **Zimbabwe (ZIMRA regulatory adjustments):**
    a. Personal goods exceeding $200 now attract duty on the excess value.
    b. Commercial consignments above $1,000 may be processed directly at ZIMRA counters without a clearing agent; however, pre-clearance via agents remains operationally preferable.
    c. Measures are explicitly positioned as anti-smuggling interventions, with likely implications for clearance behaviour and border processing times.
3. **Harare corridor disruption (Zimbabwe):**
    a. A truck accident involving a brick load temporarily halted inbound traffic to Harare midweek; the obstruction was cleared on the same day, limiting prolonged impact.
4. **Ramatlhabama (South Africa–Botswana):**
    a. Electrical and mobile network outages disrupted operations due to generator failure; technical intervention restored functionality later the same day, but short-term processing delays were reported.

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

*Table 6 – Delays[7] summary – South African borders[8] (both directions)*

| Border Post | Direction | HGV[9] 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 | 578 | 18.2 | 3.5 | 18.1 | 17,340 | 4,046 |
| Beitbridge | Zimbabwe-SA | 457 | 3.9 | 1.2 | 3.6 | 13,710 | 3,199 |
| Groblersbrug | SA-Botswana | 171 | 11.0 | 1.3 | 10.6 | 5,130 | 1,197 |
| Martin’s Drift | Botswana-SA | 158 | 5.6 | 1.1 | 5.4 | 4,740 | 1,106 |
| Kopfontein | SA-Botswana | 193 | 4.8 | 1.3 | 4.5 | 5,790 | 1,351 |
| Tlokweng | Botswana-SA | 26 | 0.6 | 0.2 | 0.4 | 780 | 182 |
| Vioolsdrift | SA-Namibia | 30 | 3.5 | 1.4 | 3.3 | 900 | 210 |
| Noordoewer | Namibia-SA | 20 | 2.5 | 0.5 | 2.3 | 600 | 140 |
| Nakop | SA-Namibia | 30 | 3.6 | 0.4 | 3.3 | 900 | 210 |
| Ariamsvlei | Namibia-SA | 20 | 1.1 | 0.4 | 1.1 | 600 | 140 |
| Skilpadshek | SA-Botswana | 234 | 16.4 | 2.2 | 16.3 | 7,020 | 1,638 |
| Pioneer Gate | Botswana-SA | 76 | 0.0 | 0.0 | 0.0 | 2,280 | 532 |
| Ramatlhabama | SA-Botswana | 187 | 4.9 | 1.1 | 4.5 | 5,610 | 1,309 |
| Ramatlhabama | Botswana-SA | 58 | 0.4 | 0.2 | 0.2 | 1,740 | 406 |
| Lebombo | SA-Mozambique | 1,507 | 3.1 | 0.5 | 3.1 | 45,210 | 10,549 |
| Ressano Garcia | Mozambique-SA | 1,410 | 1.6 | 0.2 | 1.4 | 42,300 | 9,870 |
| **Sum/Average** | | **5,155** | **5.1** | **1.0** | **4.9** | **154,650** | **36,085** |

*Source: TransAfricaBorder, week ending 12/04/2026.*

*Table 7 – Delays summary – Corridor perspective*

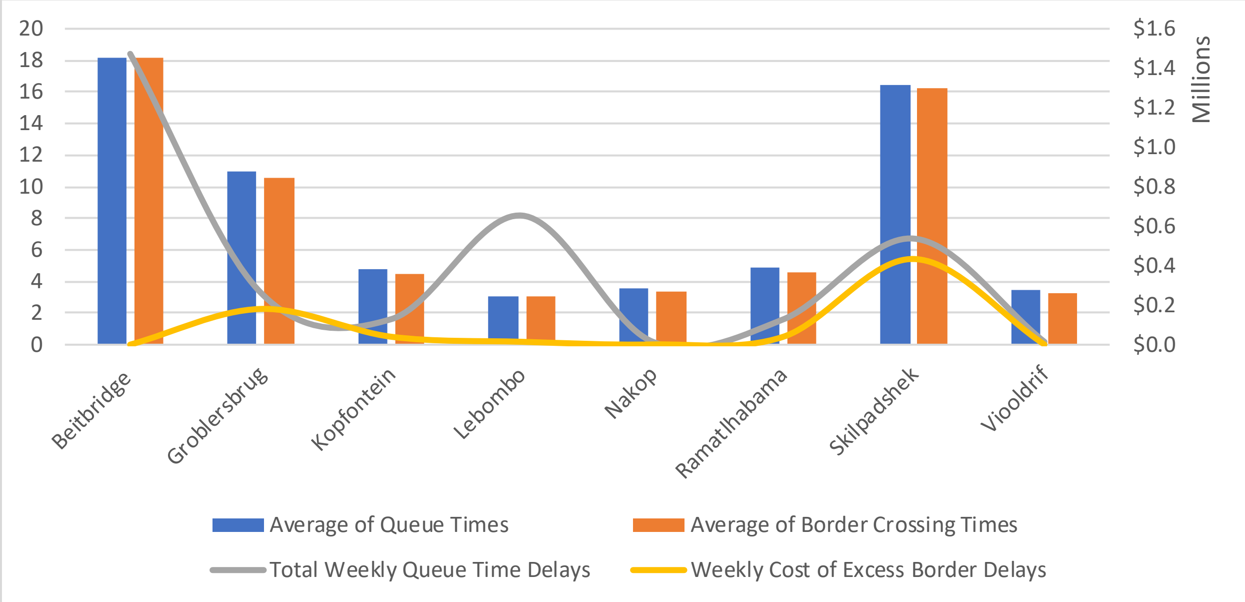
| Corridor | HGV Arrivals per day | Queue Time | Border Time – Best 5% | Border Time – Median | Est. HGV Tonnage per day | Weekly HGV Arrivals |
|---|---|---|---|---|---|---|
| **Beira Corridor** | 320 | 7.4 | 1.6 | 7.3 | 9,600 | 2,240 |
| **Central Corridor** | 798 | 0.0 | 0.0 | 0.0 | 23,940 | 5,586 |
| **Dar Es Salaam Corridor** | 1,819 | 19.6 | 1.4 | 18.5 | 54,570 | 12,733 |
| **Maputo Corridor** | 2,917 | 2.4 | 0.4 | 2.2 | 87,510 | 20,419 |
| **Nacala Corridor** | 127 | 0.0 | 0.0 | 0.0 | 3,810 | 889 |
| **North/South Corridor** | 3,509 | 13.7 | 2.5 | 15.7 | 105,270 | 24,563 |
| **Northern Corridor** | 2,817 | 0.4 | 0.0 | 0.3 | 92,520 | 21,588 |
| **WBNLD Corridor** | 804 | 4.2 | 0.8 | 4.0 | 24,120 | 5,628 |
| **Trans Cunene Corridor** | 100 | 2.7 | 0.7 | 2.5 | 3,000 | 700 |
| **Trans Kalahari Corridor** | 100 | 0.0 | 0.0 | 0.0 | 3,000 | 700 |
| **Trans Oranje Corridor** | 116 | 6.5 | 0.3 | 6.3 | 3,480 | 812 |
| **Sum/Average** | **13,427** | **6.0** | **0.9** | **6.3** | **410,820** | **95,858** |

*Source: TransAfricaBorder, week ending 12/04/2026.*

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

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

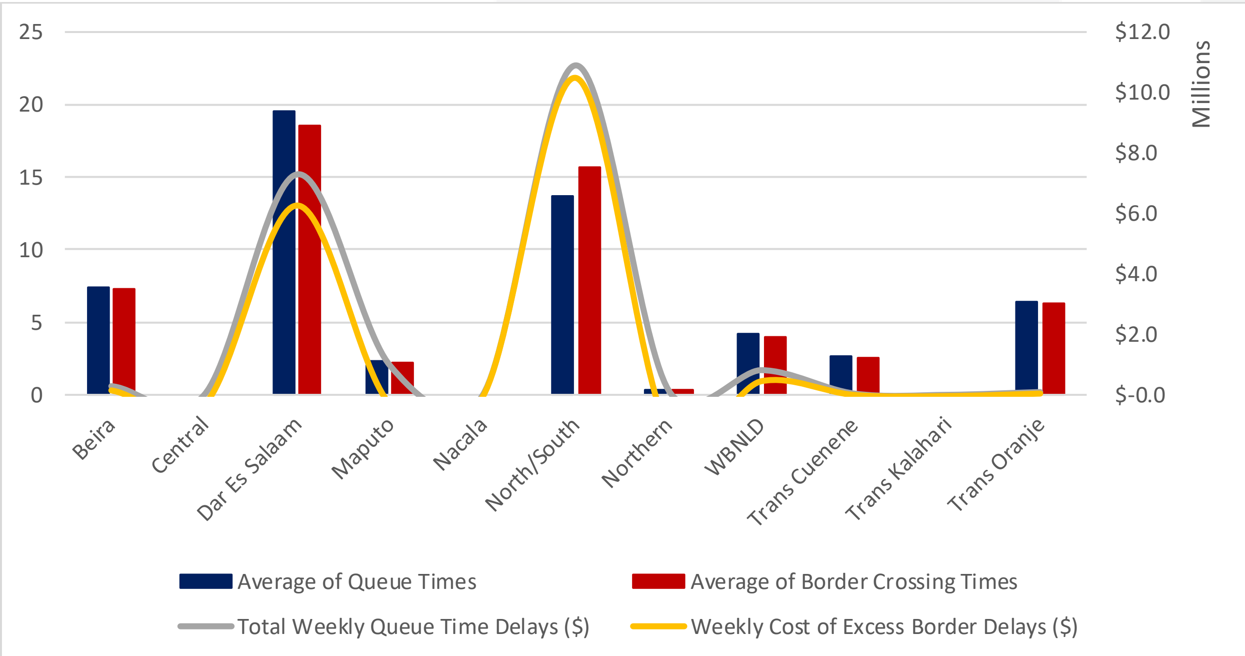
*Figure 12 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)*




*Source: Calculated from [TransAfricaBorder](), week ending 12/04/2026.*

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, week ending 12/04/2026.*

In summary, cross-border queue time averaged **~6.0 hours** (down by **~0.4** from the previous week's **~6.4 hours**), indirectly costing the transport industry an estimated **$20.5 million** (**R340 million**). Furthermore, the week's average cross-border transit times hovered around **~6.3 hours** (down by **~0.8 hours** from the **~7.1 hours** recorded in the previous report), at an indirect cost to the transport industry of **$15.5 million** (**R256 million**). The total indirect cost for the week amounts to an estimated **~$36 million** (**R595 million**, down by **↓15%** from the **~R698 million** in the previous report).

## 4. International Update

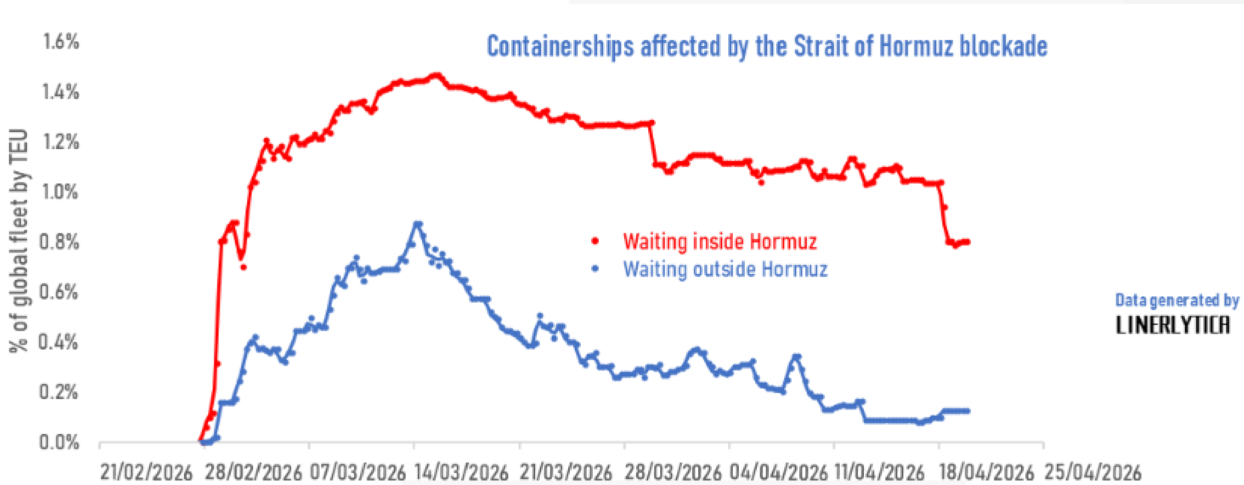
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

### a. Global shipping industry

#### i. Strait of Hormuz/Iran conflict

The latest assessment from the Strait of Hormuz indicates a continued highly volatile and operationally constrained environment, with tactical adaptation by carriers and escalating military risk. According to Linerlytica (Week 16), some limited vessel movements have resumed under extreme risk conditions. Notably, MSC succeeded in extracting up to six containerships from the Gulf on 18 April, including ultra-large units, by switching off AIS transponders (“*stealth mode*”) during transit and only reactivating them once clear of the Arabian Sea. This reflects a shift toward non-standard navigation practices and highlights the breakdown of normal maritime governance and transparency in the corridor.

*Figure 14 – Containership affected by the Strait of Hormuz blockade*




*Source:* [Linerlytica]

However, subsequent developments materially worsened the security outlook. Iranian IRGC forces have escalated direct interventions, including the seizure of two MSC-linked boxships (MSC *Francesca* and *Epaminondas*) and attacks on a third vessel. These actions were justified by Iran on grounds of alleged regulatory violations and AIS manipulation, but effectively signal a willingness to interdict commercial shipping at scale.[10]

Broader reporting confirms a pattern of instability: intermittent “open/closed” status of the strait, gunfire incidents, and continued geopolitical deadlock. Vessel traffic remains severely depressed, insurance costs are elevated, and operators face acute uncertainty around safe passage.[11] Structurally, the Strait is now best characterised as conditionally accessible rather than open, with transit contingent on political alignment, tactical routing decisions, and elevated risk tolerance.

[10] Maritime Executive. 22/04/2026. Iran’s IRGC Retaliates by Seizing Two Boxships Linked to MSC.
[11] Reuters. 22/04/2026. Strait open. Closed. Talks on. Off. Repeat.

Supplementary reporting reinforces that the Strait's instability is not episodic but structurally embedded in an escalating geopolitical standoff. The US has maintained a naval blockade despite extending the ceasefire, with at least 28 vessels reportedly redirected, effectively constraining normal commercial access. Iran has explicitly linked any reopening of the Strait to the lifting of this blockade, signalling a strategic coupling of maritime access with broader military leverage.

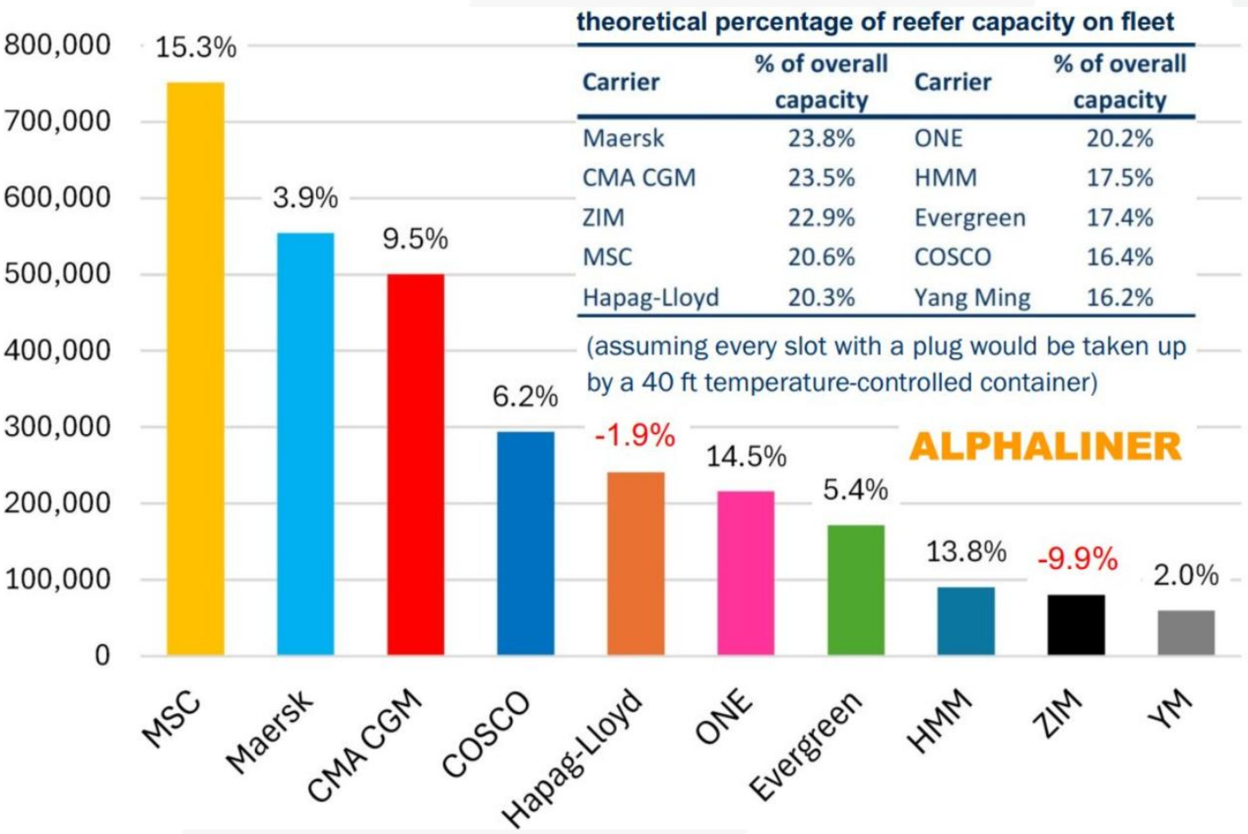
Operationally, this has translated into direct kinetic incidents, including IRGC attacks on merchant vessels near Omani waters and persistent threats to UK- and MSC-linked ships. Concurrently, diplomatic channels remain fragile: planned US–Iran talks have stalled, while parallel regional tensions (notably Israel–Hezbollah) remain active and interlinked.

Forward-looking risk is asymmetrically skewed to further disruption. The environment is characterised by high congestion, militarisation, and elevated miscalculation risk, where even isolated incidents could trigger broader escalation, including potential spillovers into adjacent chokepoints such as Bab El-Mandeb.

### ii. Global reefer capacity

Alphaliner reports continued expansion in reefer capacity among the top 10 carriers, with combined capacity increasing by **↑7.9%** year-on-year to April 2025. MSC recorded the largest absolute growth, adding 100,000 reefer plugs (**↑15.3%**), slightly outpacing its overall fleet expansion. Ocean Network Express also posted strong growth (**↑14.5%**), driven by delivery of high-spec 13,900 TEU new buildings, particularly on Asia–Latin America trades. Structurally, European carriers such as Maersk and CMA CGM maintain a higher share of reefer capacity (**~24%**) relative to Asian peers, including COSCO and Yang Ming Marine Transport Corporation (**~16%**), indicating differentiated strategic positioning in temperature-controlled cargo.

*Figure 15 – Top 10 carrier ranking by reefer plugs (y/y change, %)*

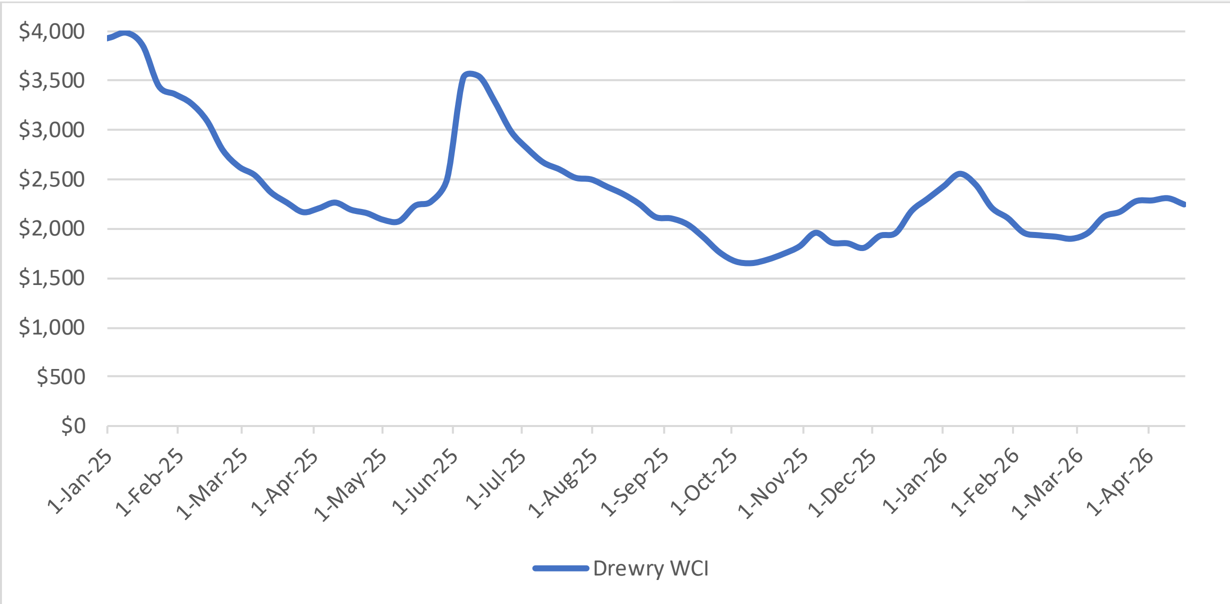



*Source: Alphaliner*

### iii. Global freight rates

After six weeks of average increases, global container freight rates have this week reversed, as rates are up by ↑**2,7%** (or **$63**) to **$2,246 per 40-ft container**, according to Drewry's latest "*World Container Index (WCI)*". The surge was initially created by higher bunker fuel prices following the conflict. Despite the recent surge, overall rates remain at similar levels compared to this time last year (↑**2%**, y/y) and slightly down versus the start of last year:

*Figure 16 – Drewry World Container Index (US$/40ft)*




*Source:* [Drewry]

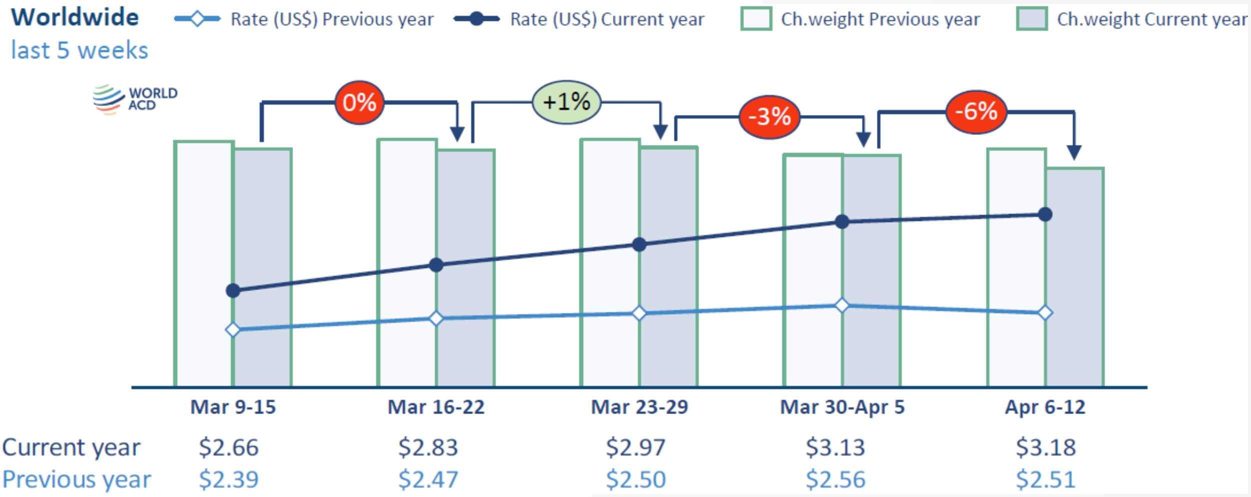
Drewry warns that shippers should prepare for reduced schedule reliability, potential port omissions, longer lead times and upward pressure on freight rates going forward.

## b. Global air cargo industry

The high-frequency WorldACD data show that global air cargo markets remain typified by a tightening pricing environment despite weakening short-term demand. In week 15 (6–12 April), global spot rates increased by a further ↑**3%** week-on-week to **$3.76/kg**, now ↑**37%** higher year-on-year and over ↑**40%** above late-February levels, reflecting sustained disruption-linked pricing pressure.

This rate resilience contrasts with a ↓**6%** week-on-week decline in global tonnages, driven largely by seasonal Easter effects and broad-based weakness across Europe (↓**15%**), Africa (↓**7%**), and Asia Pacific (↓**3%**). Capacity continues to normalise (↑**1%**, w/w), supported by recovering belly-hold supply, particularly in Middle East and South Asia (MESA) markets, although regional capacity remains structurally constrained year-on-year.

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




*Source: World ACD*

Regionally, Africa-origin rates rose ↑**4%** week-on-week (↑**62%**, y/y), while MESA-Europe pricing surged (↑**89%**, y/y), underscoring persistent routing disruptions and modal spillover from constrained ocean freight. The outlook remains uncertain, with fuel cost pressures and fragile geopolitical conditions expected to sustain elevated rate levels.

**ENDS** [12]

[12] **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.*