Authored by:
www.saaff.org.za

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Cargo Movement Update #281[1]

Date: 10 May 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)	18,803	21,423	**40,226**	21,411	24,393	**45,804**	**↓12%**
Air Cargo (tons)	3,713	2,221	**5,935**	3,749	2,320	**6,070**	**↓2%**

Monthly Snapshot

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

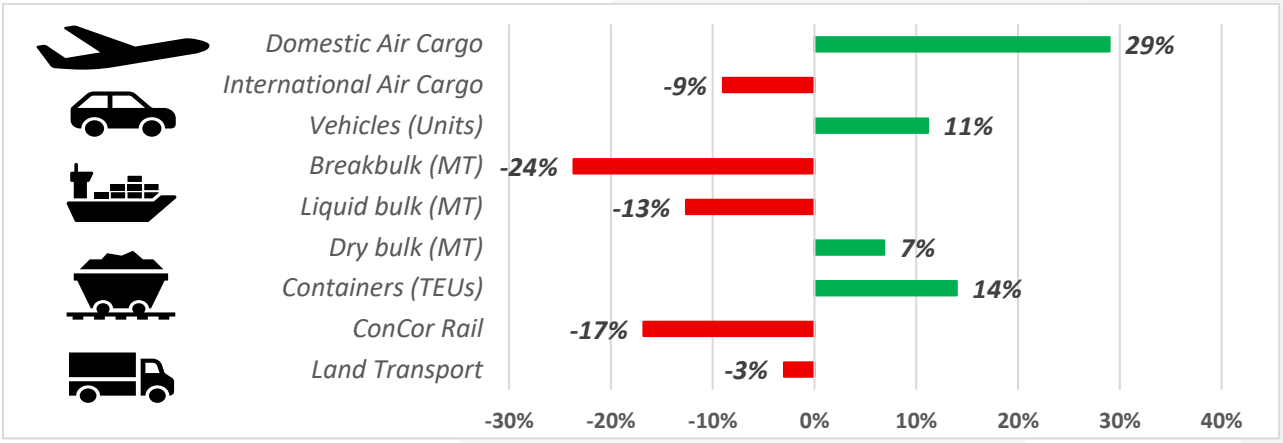
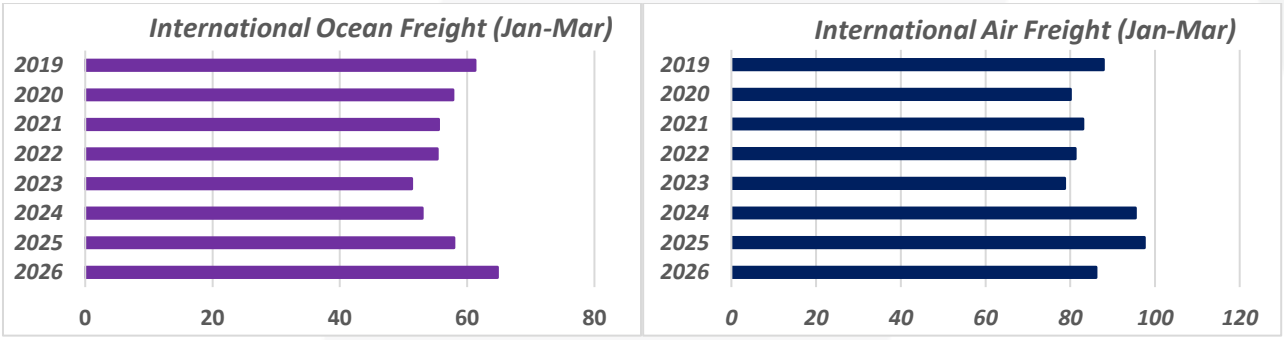


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **5,747**[6] **TEUs** were handled per day, with **7,791 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2,137** containers, up by **↑22%** from last week.
- Cross-border queue: **↓1.2 hrs**; transit: **↓2.2 hrs**; SA borders: **~8.2 hrs** (**↓6%**); SADC: **~5.2 hrs** (**↓32%**).
- Strait of Hormuz: **79 vessels** totalling around **312,812 TEU** remain idle in the Persian Gulf.
- Global container rates increased by **↑3%** to **$2 286/40ft**, reversing three weeks of declines.
- Global air cargo fell **↓7%** (w/w) after the Mother's Day flower surge; rates up **↑3%** to **$3.29/kg**.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *281st* 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 **5,747 TEUs** was handled daily, a decrease from **6,543 TEUs** the previous week.

This week, port operations reflected mixed performance across the country, with poor weather conditions remaining a significant challenge, especially in the Cape regions. In contrast, several ports managed to perform well despite the challenges. CTCT and PECT in particular reported strong volumes, in spite of weather disruptions. NCT had a slower week, likely due to the weather, while Durban's Pier 1's delay was attributed to more technical challenges related to equipment breakdowns. The outlook for the coming week is similar to the previous.

For the global shipping industry, the Strait of Hormuz disruption remains materially different from the Red Sea crisis. The Red Sea crisis created a systemic route-lengthening shock, with large-scale diversions around the Cape of Good Hope and visible increases across container, dry bulk, Ro-Ro and tanker movements. By contrast, the Hormuz disruption is primarily a regional access and volume shock concentrated around Persian Gulf trade flows, with the main impact being the immobilisation and redeployment of vessel capacity in and around the Gulf rather than a wholesale restructuring of global East–West liner networks.

Only **17 non-Iranian-linked containerships**, totalling approximately **127,000 TEU**, have exited the Strait since the conflict began. In contrast, **79 vessels** totalling around **312 812 TEU** remain idle in the Persian Gulf, with a further **28 containerships** operating as intra-Gulf feeders. Therefore, the principal risk is less a further surge in Cape routing and more regional congestion, feeder disruption, schedule instability, and secondary pressure at nodes such as West Coast India, Colombo and potentially Port Louis.

Elsewhere, Maryland finalised a **$2.25 billion** *Dali* settlement, CMA CGM pledged **$800 million** to Mombasa, and the EU added **46 vessels** to its Russia sanctions list, taking the designated shadow fleet to **632 vessels**.

This week's international cargo flows dipped slightly from last week. The daily average amounted to **~530,500 kg** inbound (**↓1%**, w/w) and **~317,000 kg** outbound (**↓4%**). Current volumes to and from ORTIA are below the commensurate volumes of May last year (**↓5%**) and the pre-pandemic May of 2019 (**↓10%**).

Global air cargo remains broadly resilient but uneven, with IATA's Q1 2026 data showing modest demand growth, firmer load factors, and continued cost pressure from elevated jet fuel spreads. Africa underperformed the global trend, with softer cargo traffic against expanding capacity, pointing to weaker utilisation despite still-elevated pricing.

Concerning high-frequency data, global air cargo softened in the latest week as the post-Mother's Day flower surge unwound and holiday effects weighed on activity, with worldwide chargeable weight falling **↓7%** (w/w). However, pricing continued to strengthen, with the global average rate rising to **$3.29/kg**, while preliminary April data showed tonnage recovering **↑5%** (y/y) and rates increasing **↑28%** (y/y).

The latest *Ctrack Transport and Freight Index* points to a broad-based recovery in South Africa's logistics sector in Q1 2026, with the index rising to its highest level since May 2024 on the back of stronger sea, road, rail, and storage activity, while air freight remained under pressure. However, the positive start to the year is likely to be tested by the subsequent **(1)** fuel-price shock and **(2)** broader geopolitical uncertainty, given the sector's acute exposure to fuel as a major input cost.

For April, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts decreased by **↓4.5%** (m/m). Northbound traffic (Eastbound for Lebombo) decreased across the board, notably at **Groblersbrug**

(↓**10%**), **Beitbridge** (↓**9%**) and **Kopfontein** (↓**8%**). Southbound traffic (Westbound for Lebombo) also decreased at some borders, notably at **Skilpadshek** (↓**15%**). There were, incidentally, significant increases witnessed at **Kopfontein** (↑**17%**).

On the N4 corridor, movements significantly decreased for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **2 trains per day**) were stable for the week. Truck volumes through the border post significantly decreased to around **1,331 HGVs per day** (↓**15%**, w/w). Overall, queue times were stable at an average of **~3.9 hours** (**no change**) at the border. The average processing times were also stable at an average of **~3.6 hours** (**no change**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time decreased by almost **an hour and a quarter** from last week, as transit time also decreased by more than **two hours**. The median border crossing times at South African borders decreased by **half an hour** on average, averaging **~8.2 hrs** (↓**6%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased by **two and a half hours**, averaging **~5.2 hrs** (↓**32%**). This week, on average, **two** SADC borders took more than a day to cross, namely Chirundu OSBP and Kasumbalesa (the worst affected, taking around **three days** to cross from the **Zambian side**).

Cross-border developments this week included **(1)** significant scanner-related congestion at Kazungula, where northbound and southbound queues remained elevated following a scanner outage and subsequent backlog, **(2)** a major bus accident on the N1 at Witvlag, which temporarily closed the route in both directions and required traffic to divert via the R523 through Siloam, and **(3)** ongoing procedural and enforcement issues at Kanyaka and Groblersbrug, including disputed scanning fees for empty vehicles and queue-management challenges linked to trucks awaiting pre-cleared documentation.

In summarising this edition, we turn our attention to the ongoing structural reform of South Africa's rail network. This week, Transnet's Rail Infrastructure Manager (TRIM) reported further progress in rail reform, having concluded Rail Access Agreements with all **11 Train Operating Companies** (TOCs) allocated slots, increasing active operators on the national rail network from one to twelve. The operators span coal, manganese, containers, fuel, and general freight across five strategic corridors, with allocations expected to add **24 million tonnes of freight capacity**, potentially scaling to **52 million tonnes within five years**. TRIM also highlighted its Ad Hoc Slot process, including a proposed Cato Ridge–Durban short-haul service aimed at reducing port-precinct road congestion. Some operators may start in 2026, with others expected in 2027. As often emphasised, these reform initiatives are not merely necessary but foundational to the evolution of South Africa's trade, transport, and logistics system into a more competitive, integrated, and growth-enabling economic network.

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 4 to 10 May (measured in TEUs)

7-day flow reported (04/05/2026 – 10/05/2026)			
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)	1,999	13,991	↓13%
Cape Town Container Terminal	2,135	14,943	↑18%
Ngqura Container Terminal	850	5,950	↓42%
Port Elizabeth Container Terminal	450	3,151	↑102%
Other	313	2,191	↓59%
Total	**5,747**	**40,226**	↓12%

Source: Calculated from TPT, 2026. Updated 10/05/2026.

An average of **~5,747 TEUs** (↓12%) was handled per day for the last week (*4 to 10 May, **Error! Reference source not found.***). Consequently, throughput was below the projected average of **~7,791 TEUs** (↓26% actual versus projected). For the coming week, an increased average of **~7,791 TEUs** (↑36%) is predicted to be handled (*11 to 17 May*, *Table 3*).

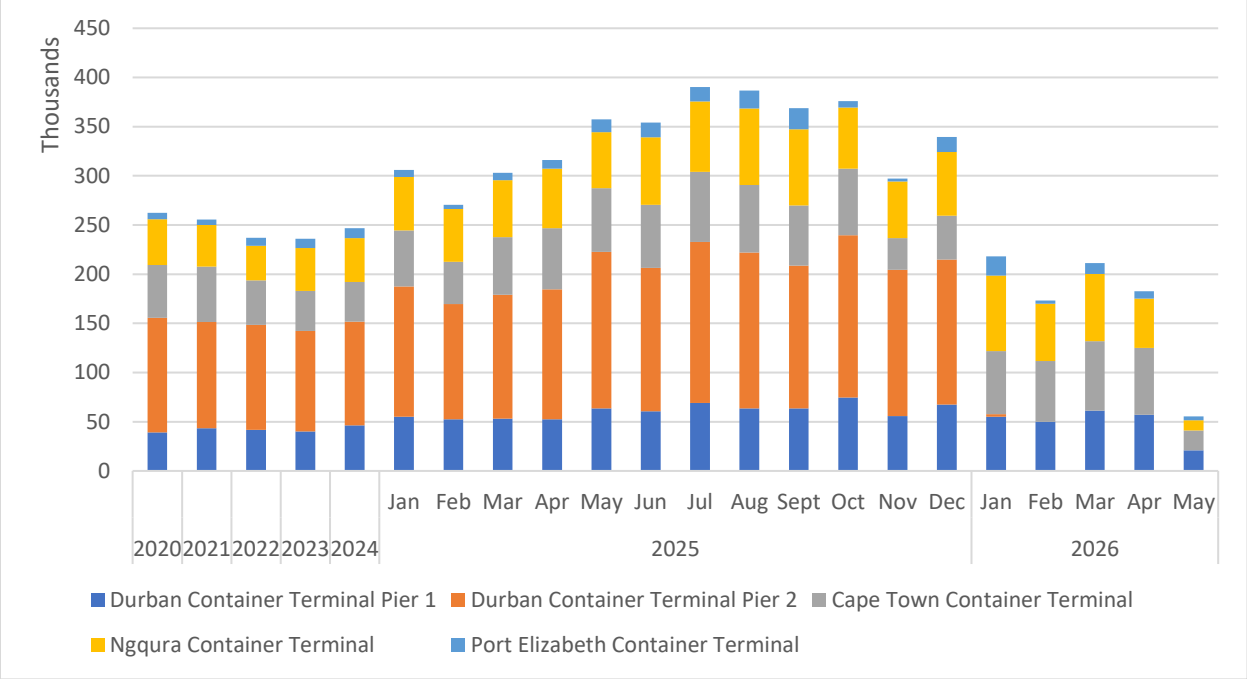
Table 3 – Container Ports – Weekly flow projected for 11 to 17 May (measured in TEUs)

7-day flow projected (11/05/2026 – 17/05/2026)			
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)	1,982	13,874	↓1%
Cape Town Container Terminal	2,272	15,904	↑6%
Ngqura Container Terminal	2,181	15,268	↑157%
Port Elizabeth Container Terminal	472	3,304	↑5%
Other	884	6,190	↑183%
Total	**7,791**	**54,540**	↑36%

Source: Calculated from TPT, 2026. Updated 10/05/2026.

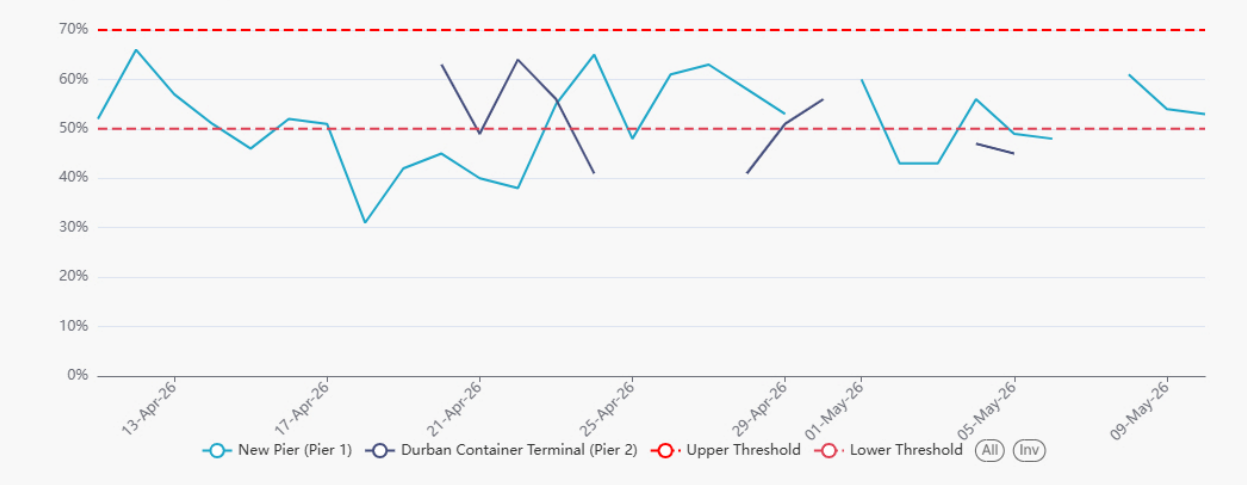
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2026, and updated 10/05/2026.

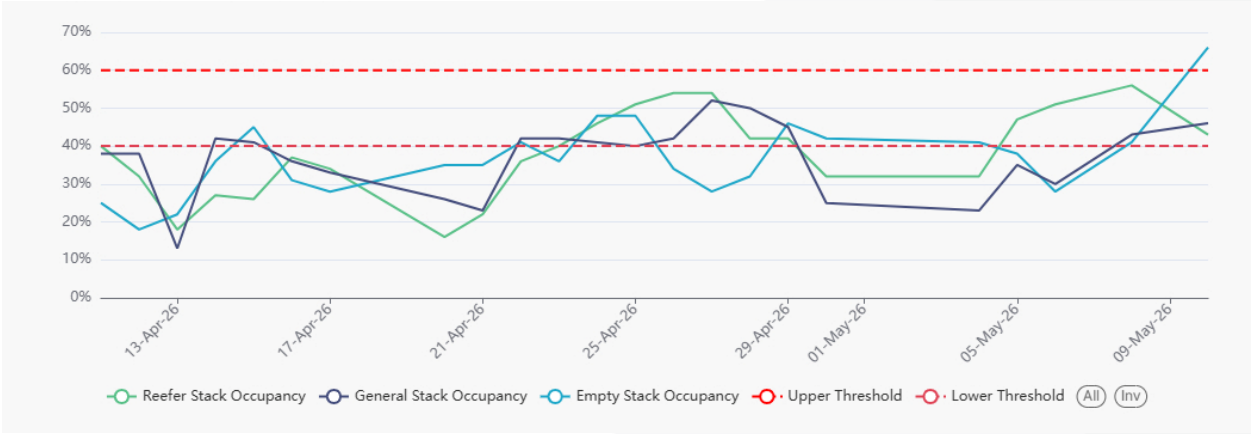
Figure 4 – Stack occupancy in Durban, general-purpose containers (4 April to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 10/05/2026.

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 (4 April to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 10/05/2026.

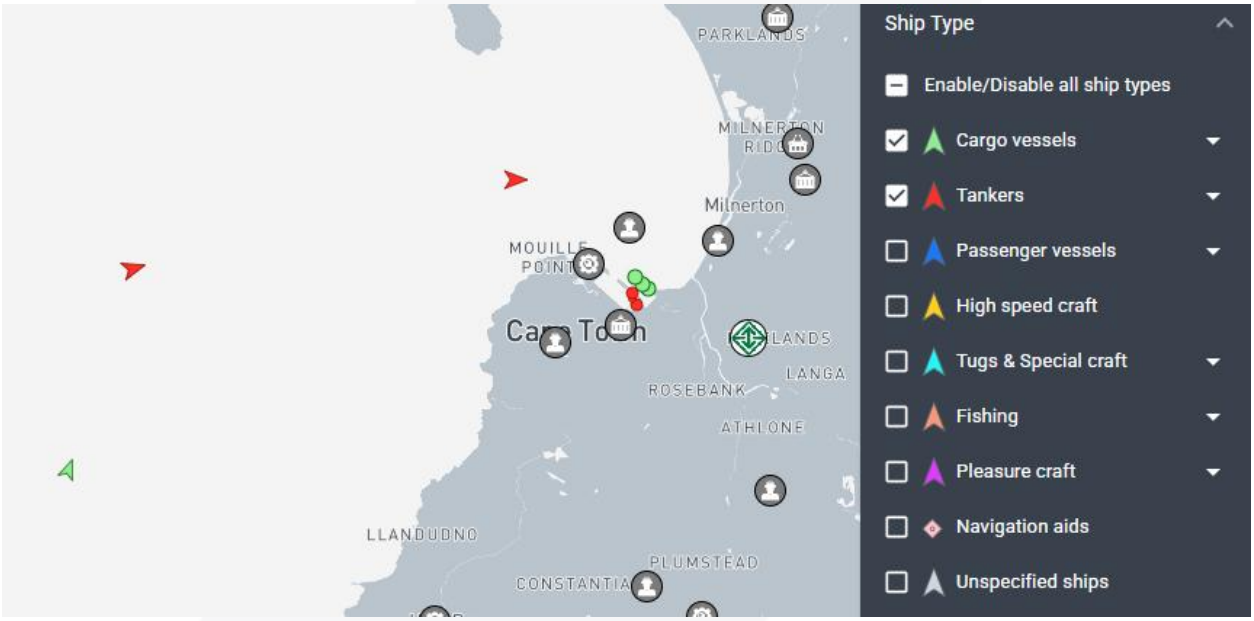
b. Summary of port operations

i. Cape Town

Cape Town Container Terminal had a stronger week than the previous one, despite significant weather disruptions towards the end of the week. The weather delays are expected to continue into the present week. The terminal had around 9 vessel calls, with most vessels berthing on arrival (average of 1 hour spent at anchorage). However, this figure could be impacted by vessels sheltering at St Helena Bay due to the inclement weather. Vessels spent around 41 hours at berth. Equipment performance was strong, with an average of eight out of 9 STS cranes and 26 out of 32 RTGs available throughout the week.

Cape Town Multi-Purpose Terminal had an exceptionally quiet week, with operations largely limited to completing the vessel on berth from the previous week, with no follow-on vessel recorded.

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



Source: Marine Traffic. Updated 10/05/2026 at 14:00.

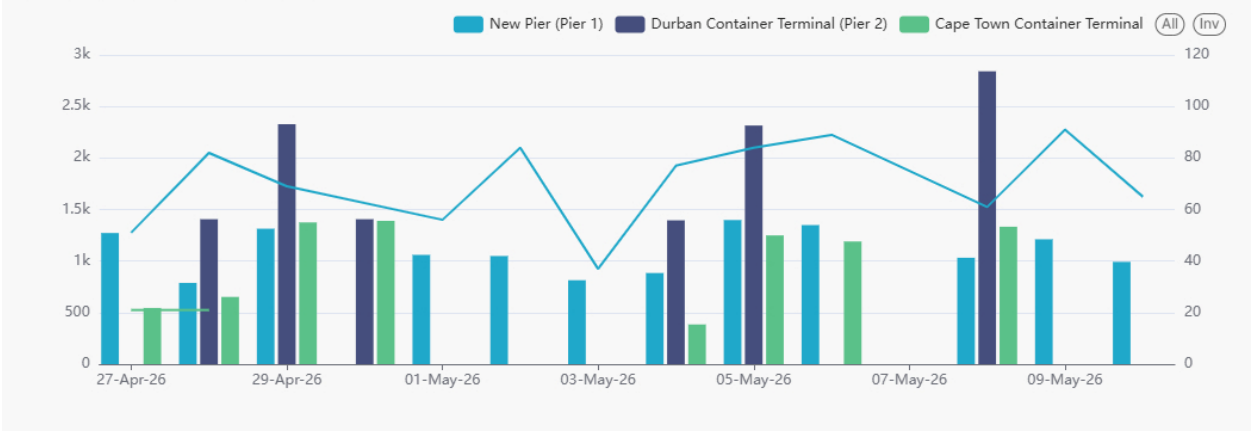
ii. Durban

Pier 1 experienced a slower week, with volumes down from the previous week, paired with a lower berth occupancy. Though truck turnaround times are generally down from the previous week, they remain somewhat higher than the overall expected performance, due to equipment challenges, though this is expected to normalise within the next week. The terminal had around five vessel calls, waiting around 27 hours at anchorage and spending approximately 42 hours at berth. Equipment availability remained constrained, with an average of five out of seven cranes and only 12 out of 25 RTGs available. The **TTT** for the week averaged **~47 minutes** (**↓29%**, w/w), and the average **staging time** was **~49 minutes** (**↑11%**).

From the information available, Durban Gateway Terminal seemed to deliver a relatively normal and steady week, supported by consistent road and rail volumes, though rail on hand remained quite high. The terminal had an estimated seven vessel calls, with a slightly higher time at anchorage (estimated at an average of 27 hours, up 35% from the previous week's 20 hours), spending around 76 hours at berth (down around 20% from the previous week's 95 hours). Estimated throughput remained solid at around **28,000 container moves** for the week, supported by stable berth occupancy.

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.

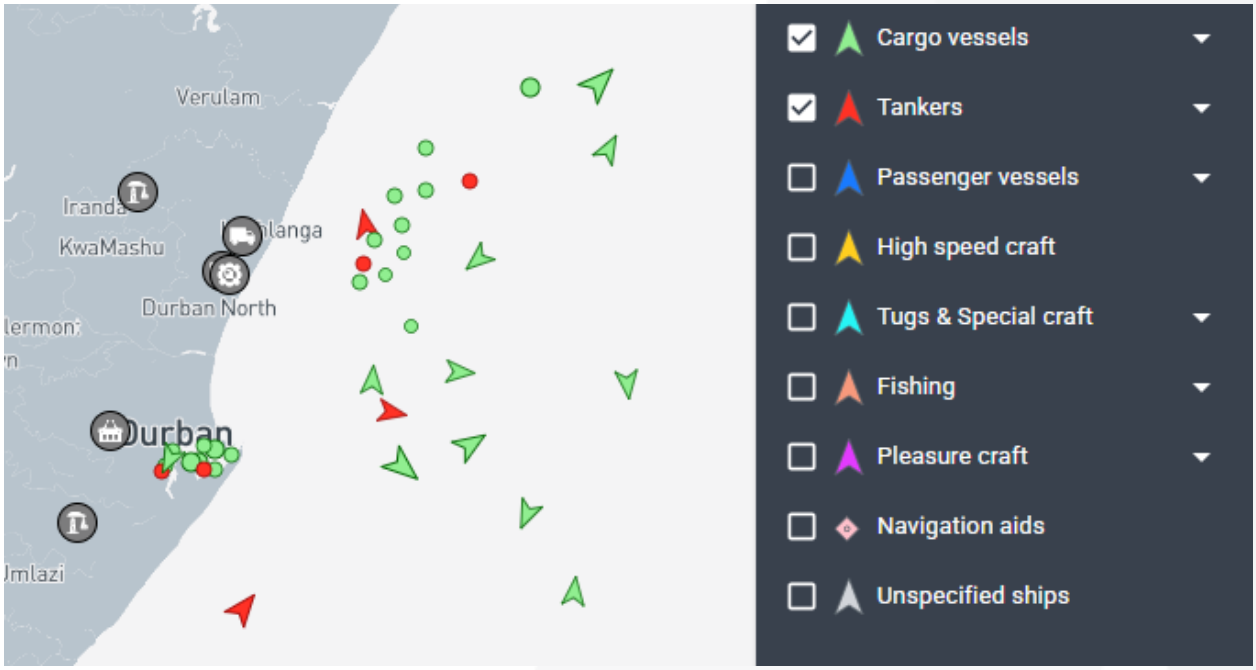
Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 10/05/2026.

The queue of container vessels waiting outside Durban **was stable** this week. On Thursday afternoon (14 May), **one** container vessels were waiting outside at anchorage for Durban, **one** for DGT. The queue of dry (**four**), liquid (**three**), and breakbulk (**two**) **was stable** from last week:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 10/05/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal reported a decline in waterside volumes, with weather disruptions, particularly over the weekend, contributing to slower vessel movements. The terminal had around three vessel calls, spending an average of 22 hours waiting at anchorage and working 76 hours at berth. Landside performance remained stable, while equipment availability averaged at six out of eight cranes and 22 out of 30 RTGs available throughout the week.

Port Elizabeth Container Terminal had a significant recovery from the previous week's low base, with waterside volumes more than doubling. The terminal handled four vessel calls, with an average time at anchorage of 16 hours and 40 hours at berth. Equipment availability was strong, with two out of two STS cranes (along with the one Mobile Harbour Crane) and eight out of 11 straddle carriers on average for the week.

iv. Richards Bay

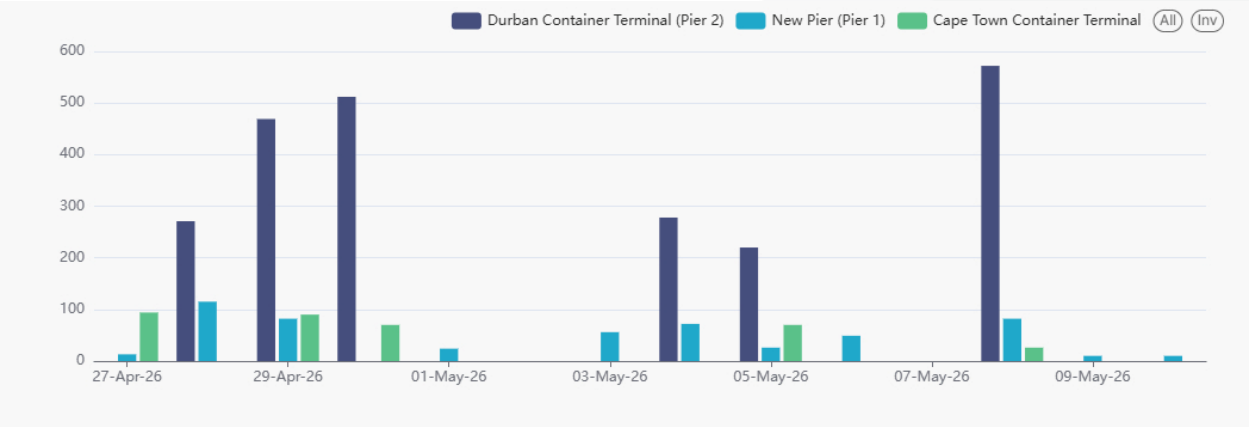
The daily average coal throughput for the week **increased** and averaged around **181,000 tons** (**↑34%**, w/w) a day. An average of **17 trains** was serviced on the landside (down from last week's **22**), and **below the target** (**22** trains).

v. Transnet Freight Rail (TFR)

In the last week (*4 to 10 May*), rail cargo on the ConCor line out of Durban was reported at **2,137** containers, up by **↑22%** from the previous week's **1,556** containers.[7]

[7] Reported volumes are lower than usual due to incomplete data coverage for the reporting week; DGT did not report operational figures for Monday or Friday, both of which coincided with public holidays.

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



Source: Calculated using data from Transnet, 2025. Updated 10/05/2026.

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 (*4 to 10 May*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *May 2025* averaged **~889,012 kg**.

Table 4 – International inbound and outbound cargo from OR Tambo

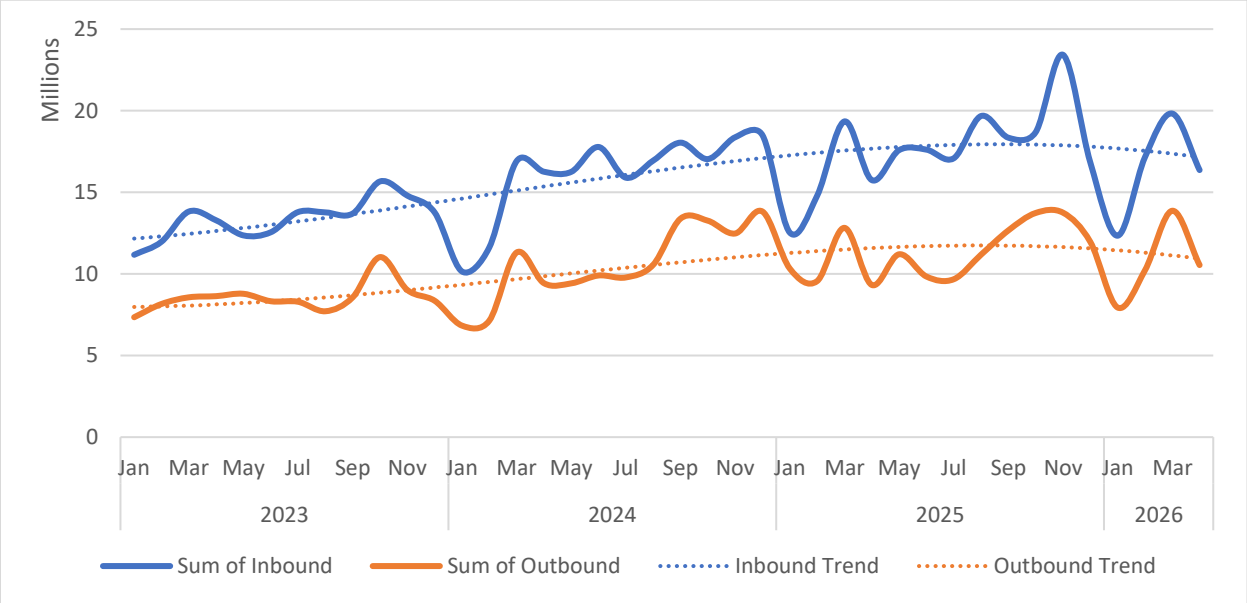
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	530,480	3,713,362	↓1%
Volume outbound	317,344	2,221,407	↓4%
Total	847,824	5,934,769	↓2%

Courtesy of ACOC. Updated: 03/05/2026.

This week's international cargo flows dipped slightly from last week. The daily average amounted to **~530,500 kg** inbound (**↓1%**, w/w) and **~317,000 kg** outbound (**↓4%**). Current volumes to and from ORTIA are below the commensurate volumes of May last year (**↓5%**) and the pre-pandemic May of 2019 (**↓10%**).

The following figure shows the international air cargo flows to and from ORTIA since the start of 2023:

Figure 10 – International cargo: ORTIA (kg millions)



Calculated from ACOC. Updated: 10/05/2026.

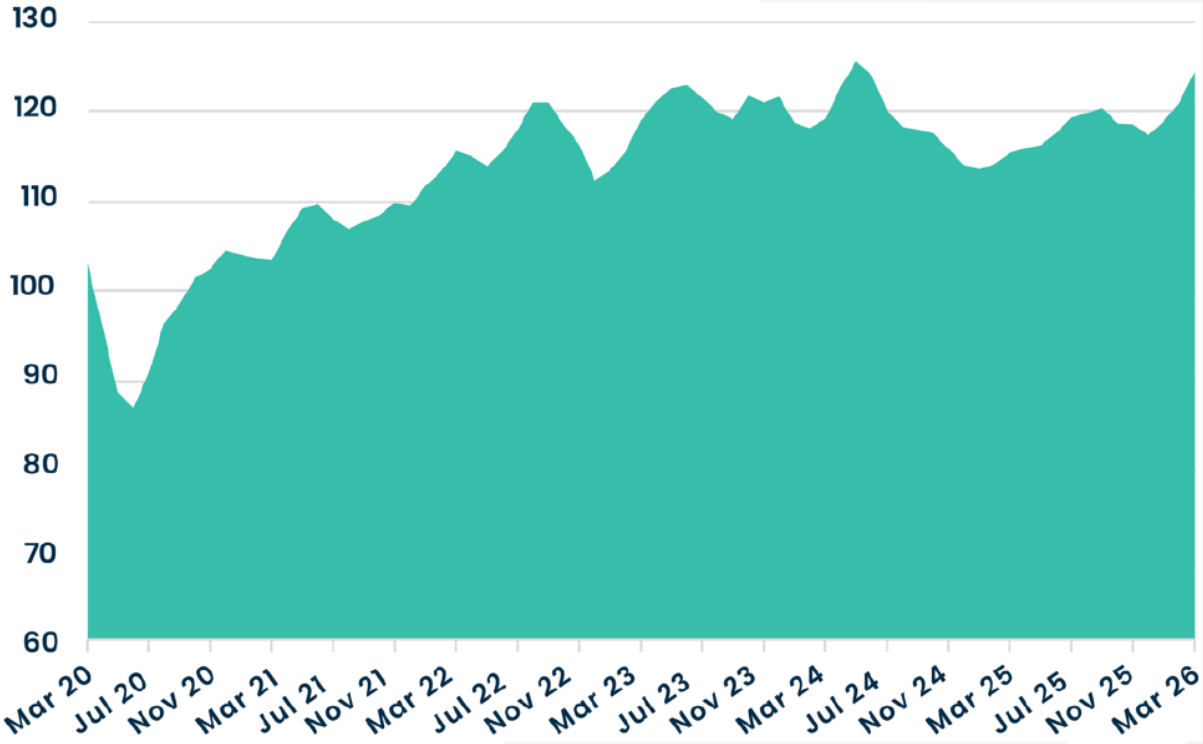
3. National Update

a. Ctrack Transport and Freight Index

The latest *Ctrack Transport and Freight Index* points to a broad-based recovery in South Africa's logistics sector in Q1 2026, with the index rising to **125.0**. The collective level is the highest level since May 2024, reflecting **↑6.2%** (q/q) and **↑8.0%** (y/y) growth. The rebound was supported by stronger economic activity, improved confidence, lower inflation and interest rates, real wage gains, and better performance across most freight modalities.

- **Sea freight was the standout performer**, increasing by **↑14.3%** (q/q) and **↑8.2%** (y/y), supported by stronger container throughput and total cargo handled across South African ports.
- **Road freight recovered strongly**, rising by **↑5.9%** (q/q) and **↑8.2%** (y/y), with improved port performance and stronger freight demand reflected in higher heavy-vehicle traffic, notably on the N3 and N4 corridors.
- **Rail freight continued its gradual recovery**, growing by **↑5.8%** (q/q) and **↑9.0%** (y/y), although rail's share of total freight payload remains materially below historic norms despite three consecutive years of improvement.
- **Storage and handling rebounded sharply**, increasing by **↑11.0%** (q/q), helped by higher inventory indicators and a significant rise in transshipments.
- **Air freight was the only major weak spot**, declining by **↓7.5%** (q/q), partly because stronger sea, road and rail performance reduced demand for air freight as a contingency mode.

Figure 11 – Ctrack Transport and Freight Index (2016 = 100)



Source: Ctrack.

Overall, the Q1 performance suggests that the transport and logistics sector likely made a positive contribution to South Africa's economic growth at the start of 2026. However, the report cautions that the subsequent **(1)** fuel-price shock and **(2)** geopolitical uncertainty could reverse some of these gains, given the sector's high dependence on fuel as a dominant input cost (ranging from **between 25% and 50%** of input cost for the respective transport modalities).

4. Road and Regional Update

a. Lebombo border post update

In the last week (*4 to 10 May)*, movements significantly decreased for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **2 trains per day**) were stable for the week.

- Truck volumes decreased to around **1,331 HGVs per day** (**↓15%**, w/w).
- Overall, queue times were stable at an average of **~3.9 hours** (**no change**) at the border.
- The average processing times were also stable at an average of **~3.6 hours** (**no change**) per crossing.

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

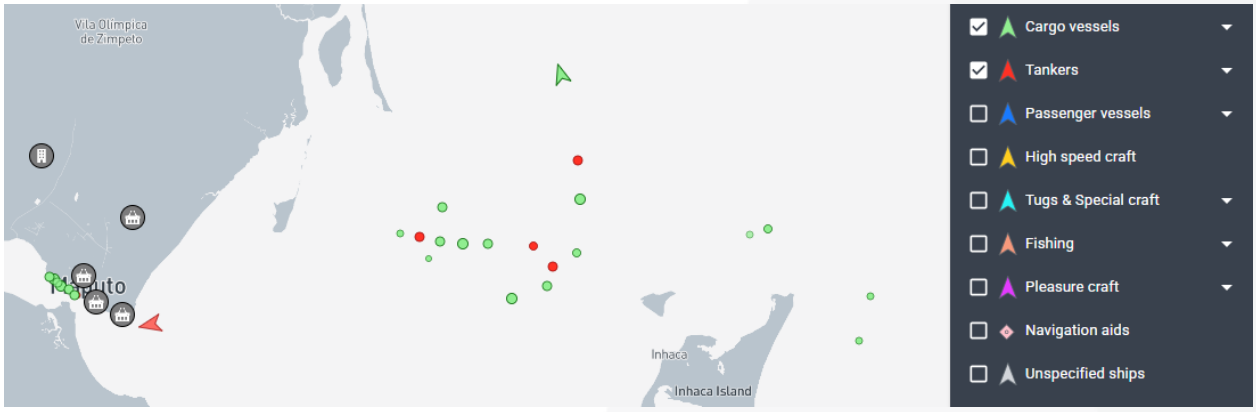
Table 5 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,331	1,300	1,032	170	33	67	46	209
% (w/w)	**-15%**	**-12%**	**-11%**	**-11%**	**-55%**	**-11%**	**12%**	**-20%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 10/05/2026.

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 13/04/2026 at 14:00.

b. SADC cross-border and road freight update

The following table shows the consolidated monthly flow of HGVs across some of the key borders for April:

Table 6 – HGVs – Main South African borders (both directions)

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	14,323	**-9%**	6,827	**3%**	**21,150**	**-6%**
Groblersbrug	6,398	**-10%**	5,324	**-4%**	**11,722**	**-8%**
Kopfontein	5,974	**-8%**	875	**17%**	**6,849**	**-5%**
Lebombo	44,373	**-3%**	42,110	**-4%**	**86,483**	**-3%**
Ramatlabama	5,906	**1%**	1,978	**-15%**	**7,884**	**-3%**
Skilpadshek	8,220	**-6%**	1,891	**-8%**	**10,111**	**-6%**

Source: TransAfricaBorder, 13/05/2026.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts decreased by **↓4.5%** (m/m). Northbound traffic (Eastbound for Lebombo) decreased across the board, notably at **Groblersbrug** (**↓10%**), **Beitbridge** (**↓9%**) and **Kopfontein** (**↓8%**). Southbound traffic (Westbound for Lebombo) also decreased at some borders, notably at **Skilpadshek** (**↓15%**). There were, incidentally, significant increases witnessed at **Kopfontein** (**↑17%**).

Notable trends this week in cross-border road freight within South Africa and the broader SADC region:

- Overall, the average queue time decreased by almost **an hour and a quarter** from last week, as transit time also decreased by more than **two hours**.
- The median border crossing times at South African borders decreased by **half an hour** on average, averaging **~8.2 hrs** (**↓6%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased by **two and a half hours**, averaging **~5.2 hrs** (**↓32%**).

1. **Kazungula:**
    a. Northbound traffic experienced significant congestion on 4 May, with the queue measured at 4.6 km in the morning before worsening to 7.2 km later in the day.

b. The disruption was caused by a scanner outage, which created a backlog despite requests for scanning to be waived temporarily. The scanner resumed operation before a formal response was received.
c. By the following morning, the northbound queue remained elevated at 5.9 km, while the southbound queue was measured at 5.0 km, both reflecting the residual scanner backlog.

2. **N1 / Witvlag:**
   a. A major bus accident with multiple casualties occurred on the N1 at Witvlag, blocking traffic in both directions and effectively closing the route until wreckage and debris could be cleared. Transporters were advised to use the R523 via Siloam as an alternative route.
3. **Kanyaka / DRC:**
   a. Drivers in the southbound queue at Kanyaka were reportedly instructed to pay a scanning fee despite their vehicles being empty.
   b. After drivers refused to pay, officials allegedly prevented trucks from proceeding, prompting a request for the Transit Bureau to intervene.

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

Table 7 – Delays[8] summary – South African borders[9] (both directions)

Border Post	Direction	HGV[10] 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	558	19.2	4.0	13.2	16,740	3,906
Beitbridge	Zimbabwe-SA	507	4.1	1.1	3.4	15,210	3,549
Groblersbrug	SA-Botswana	227	15.0	2.4	10.2	6,810	1,589
Martin's Drift	Botswana-SA	170	4.2	0.5	5.4	5,100	1,190
Kopfontein	SA-Botswana	188	8.0	1.6	9.1	5,640	1,316
Tlokweng	Botswana-SA	58	0.4	0.2	0.5	1,740	406
Vioolsdrift	SA-Namibia	30	5.4	2.2	6.4	900	210
Noordoewer	Namibia-SA	20	2.4	0.4	2.1	600	140
Nakop	SA-Namibia	30	4.3	0.4	3.4	900	210
Ariamsvlei	Namibia-SA	20	1.1	0.4	1.0	600	140
Skilpadshek	SA-Botswana	288	13.4	2.0	13.3	8,640	2,016
Pioneer Gate	Botswana-SA	67	0.0	0.0	0.0	2,010	469
Ramatlabama	SA-Botswana	154	4.4	1.0	5.5	4,620	1,078
Ramatlabama	Botswana-SA	76	0.4	0.2	0.5	2,280	532
Lebombo	SA-Mozambique	1,477	4.0	1.3	4.1	44,310	10,339
Ressano Garcia	Mozambique-SA	1,388	1.5	0.2	1.2	41,640	9,716
Sum/Average		**5,258**	**5.5**	**1.1**	**5.0**	**157,740**	**36,806**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 03/05/2026.

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

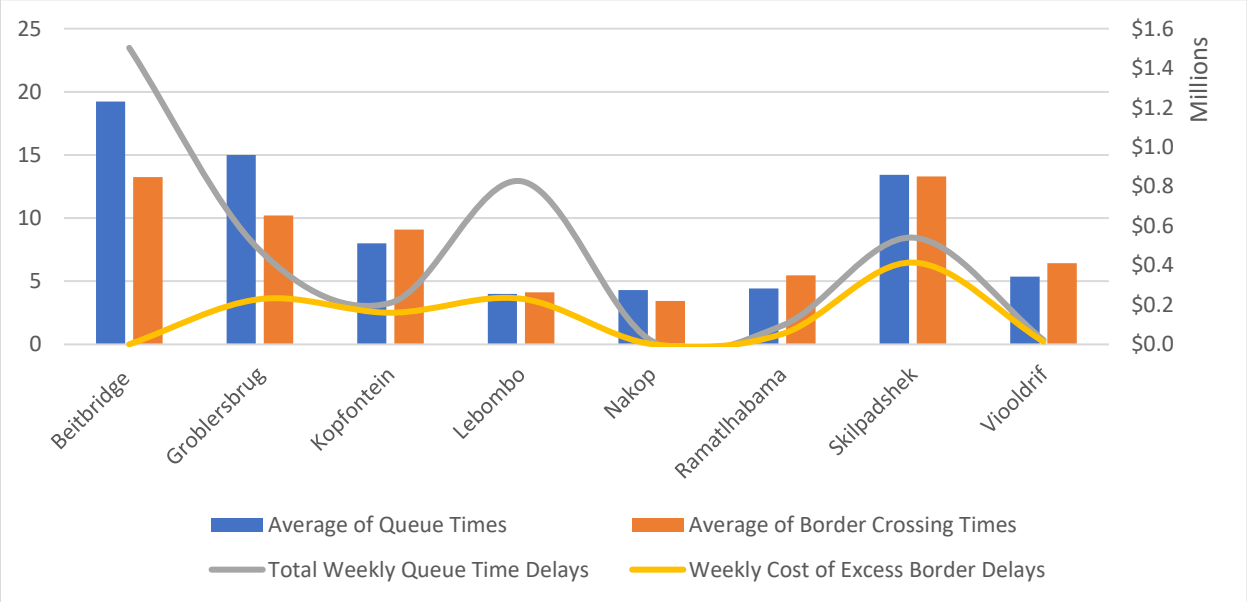
Table 8 – Delays summary – Corridor perspective

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	8.5	1.7	7.6	9,600	2,240
Central Corridor	798	0.0	0.0	0.0	23,940	5,586
Dar Es Salaam Corridor	1,819	21.6	5.0	17.2	54,570	12,733
Maputo Corridor	2,865	2.7	0.8	2.6	85,950	20,055
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,607	15.8	3.1	12.8	108,210	25,249
Northern Corridor	2,817	0.2	0.0	0.2	92,520	21,588
WBNLD Corridor	861	4.2	0.8	4.6	25,830	6,027
Trans Cunene Corridor	100	3.3	0.9	3.3	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	3.7	1.1	2.6	3,480	812
Sum/Average	**13,530**	**6.6**	**1.4**	**5.5**	**413,910**	**96,579**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 03/05/2026.

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

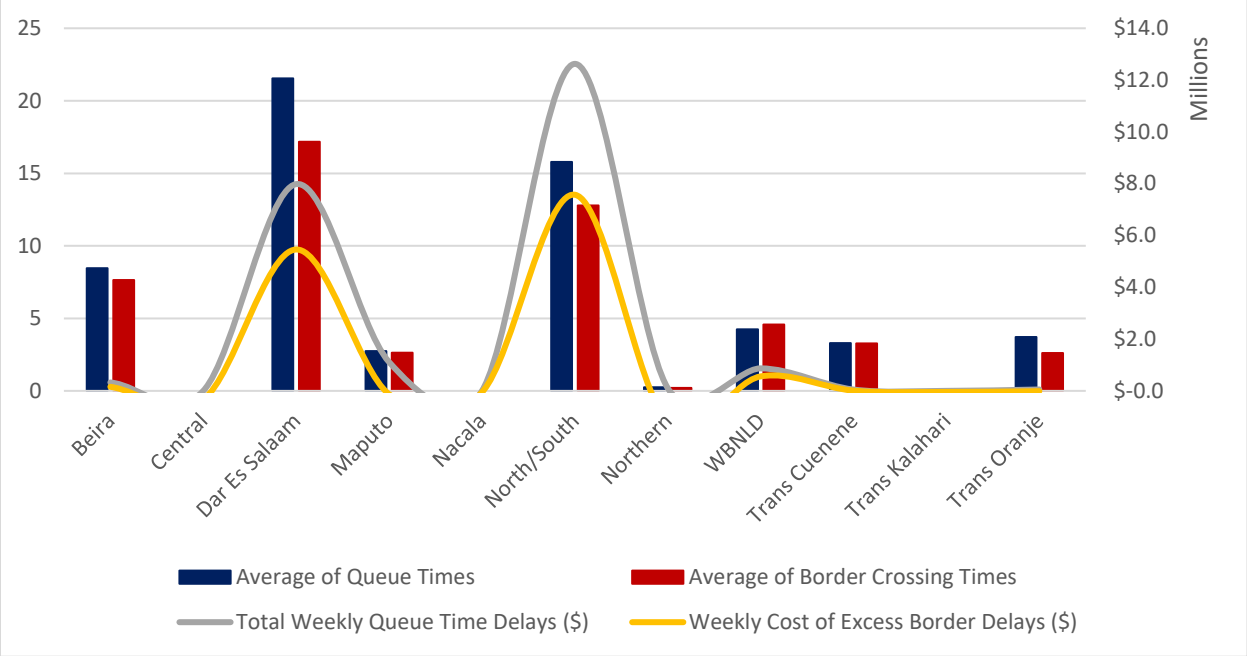
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 03/05/2026.

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 03/05/2026.

In summary, cross-border queue time averaged **~6.6 hours** (down by **~1.2 hours** from the previous week's **~7.8 hours**), indirectly costing the transport industry an estimated **$23.1 million** (**R379 million**). Furthermore, the week's average cross-border transit times hovered around **~5.5 hours** (down by **~2.2 hours** from the **~7.7 hours** recorded in the previous report), at an indirect cost to the transport industry of **$12 million** (**R197 million**). The total indirect cost for the week amounts to an estimated **~$35.1 million** (**R576 million**, down by **↓23%** from the **~R747 million** in the previous report).

5. 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

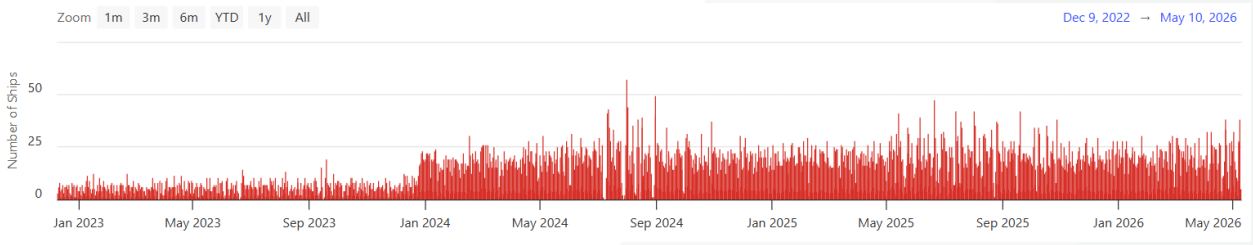
i. Strait of Hormuz/Iran conflict

Global container shipping remains under pressure from the continued disruption around the Strait of Hormuz, **although the impact differs materially from the earlier Red Sea crisis**. Whereas the Red Sea disruption created **a systemic route-lengthening shock** through large-scale Cape of Good Hope diversions, the Hormuz disruption is more accurately characterised as **a regional access and volume shock**, concentrated around Persian Gulf trade flows. In this context, the main operational effect has been the immobilisation of capacity within and around the Gulf, rather than a wholesale rerouting of global East–West liner networks. The attached analysis notes that only **17 non-Iranian-linked containerships**, with a combined capacity of approximately **127,000 TEU**, have sailed out of the Strait of Hormuz since the conflict began, while **79 vessels** totalling around **312,812 TEU** remain idle in the Persian Gulf. A further 28 containerships are reportedly operating as intra-Gulf feeders.

The effect on the Cape of Good Hope route, therefore, appears more limited than during the Red Sea crisis. The visual traffic trends below show the Red Sea crisis as the clear catalyst for the marked increase in Cape

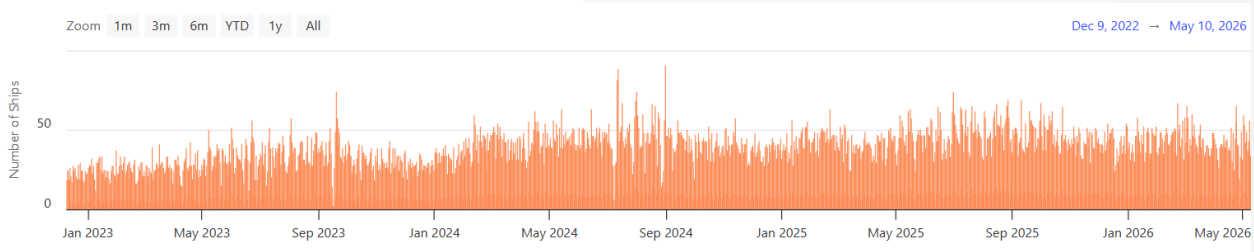
routing, particularly for container, dry bulk, Ro-Ro and tanker traffic, while **the Hormuz disruption has not yet produced a comparable step-change in Cape diversions**, except more visibly in **tanker-related movements**. This distinction is important: the Red Sea crisis primarily changed route geography, while Hormuz is constraining regional access, port calls and vessel availability in the Gulf.

Figure 15 – Transit Calls: Containers



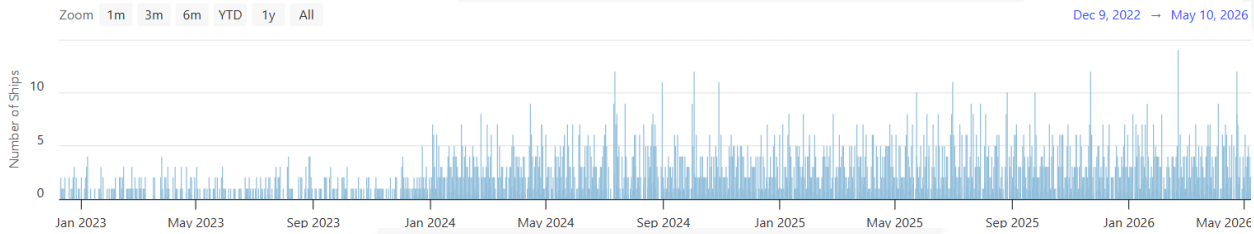
Source: IMF & Oxford

Figure 16 – Transit Calls: Dry Bulk



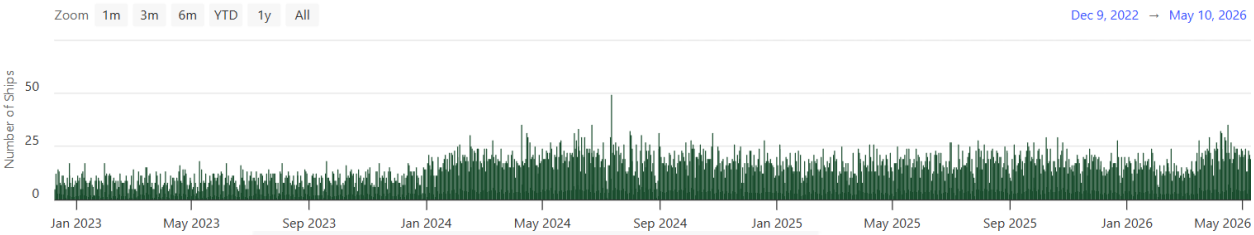
Source: IMF & Oxford

Figure 17 – Transit Calls: Ro-Ro



Source: IMF & Oxford

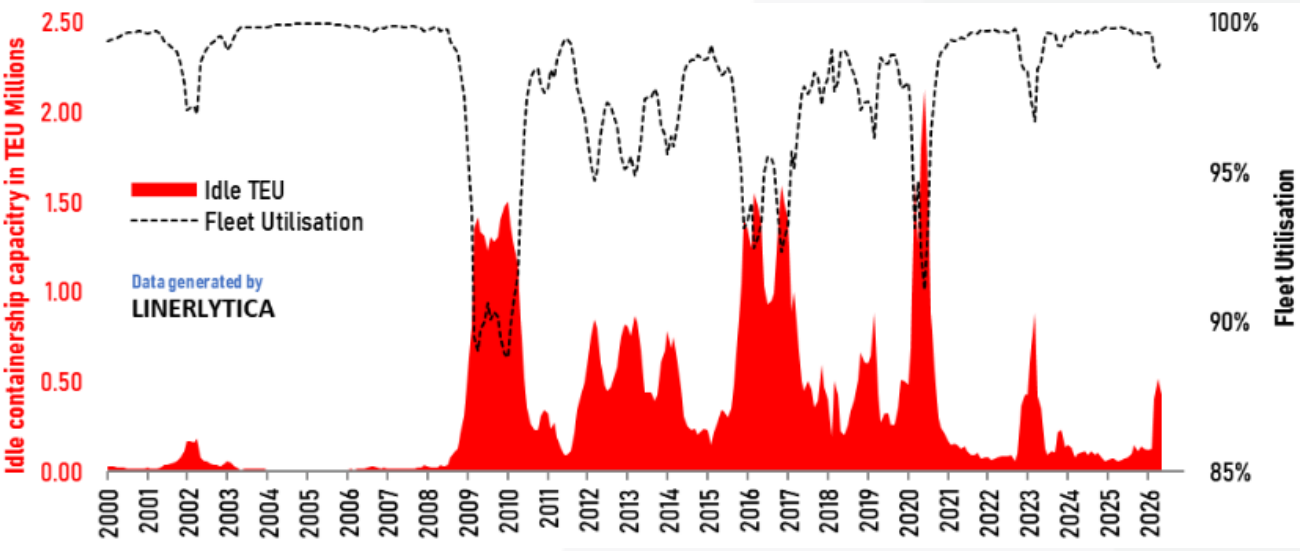
Figure 18 – Transit Calls: Ro-Ro



Source: IMF & Oxford

Despite these disruptions, container demand has reportedly remained resilient, with global volumes rebounding in May and supporting renewed freight-rate increases. Vessel space remains tight, partly because of ships trapped or idled in the Gulf and a low number of new deliveries over the past two months.

Figure 19 – Idle containership fleet: 2000 to 2026 (TEU Millions) & Fleet utilisation



Source: Linerlytica

However, the improved freight-rate environment has not necessarily translated into stronger carrier earnings across the board, with Maersk's ocean segment reportedly recording wider operating losses in Q1 and Gemini partner Hapag-Lloyd also expected to report weaker results. Moreover, the Gemini partners have amended their agreement to allow for more blank sailings, suggesting that the pursuit of higher service reliability has not yet resolved underlying margin pressure.

The latest escalation between the US and Iran near the Strait of Hormuz adds further geopolitical risk. The clash threatens to weaken an already fragile ceasefire, while Brent crude traded around $100, raising concerns about renewed energy-price pressure. Iran is also reportedly accelerating rail trade with China as a workaround to the US blockade of its ports, with cargo trains from Xi'an to Tehran now running every three or four days, compared with roughly once a week before the conflict.

Looking ahead, the Hormuz disruption may not materially increase Cape of Good Hope diversions in container shipping, but it can still create secondary effects across the regional network. These include **(1)** congestion at West Coast India ports, **(2)** Colombo as a key transhipment hub, and **(3)** potentially other nodes absorbing displaced Middle East cargo, including Port Louis. The risk is therefore less about a global rerouting shock and more about regional congestion, feeder disruption, schedule instability and higher fuel-linked cost pressure.

ii. Global shipping industry summary

Elsewhere, the following developments are worth taking note of across the industry in the last week:

1. **Baltimore bridge / *Dali* legal proceedings:**
    a. Synergy Marine, operator of the *Dali*, rejected the US Department of Justice's criminal indictment as "baseless", arguing that the casualty should be assessed through the full technical and regulatory record rather than criminalised as misconduct.[11]

[11] Maritime Executive. 13/05/2026. Dali's Operator Respond to DOJ as $2.25B Maryland Settlement is Finalized.

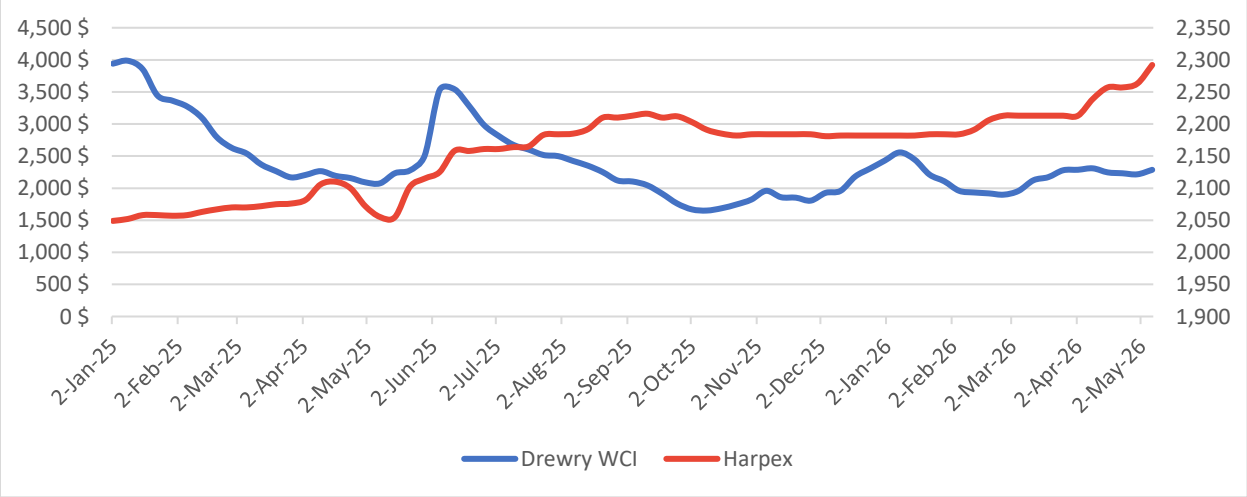
b. Maryland finalised a record **$2.25 billion** civil settlement with Grace Ocean and Synergy Marine, although claims against Hyundai Heavy Industries, the vessel's builder, remain unresolved.

2. **CMA CGM investment in Mombasa:**
   a. CMA CGM pledged **$800 million** to upgrade two container terminals at Kenya's Port of Mombasa, which handled **2.11 million TEU** last year after a growth of **↑5.5%** and is reportedly operating near full capacity.[12]
   b. The investment aligns with Kenya's move toward a landlord port model and strengthens Mombasa's role as a gateway for East and Central African hinterland markets, including Uganda, Rwanda and South Sudan.
3. **EU sanctions against Russia:**
   a. The EU launched its 20th sanctions package against Russia, adding **46 vessels** and bringing the designated Russian shadow fleet total to **632 vessels**, with these ships barred from EU port calls and marine services.[13]
   b. The package also bans EU entities from selling tankers to Russia, sanctions ship-management/service companies linked to dark-fleet operations, and targets the use of Murmansk, Tuapse and Indonesia's Karimun Oil Terminal.

iii. Global freight rates

The *Drewry World Container Index* increased by **↑3%** to **$2 286/per 40ft container**, reversing three weeks of declines, as Transpacific rates rose on the back of new EFS and PSS charges, while Asia–Europe spot rates remained broadly stable despite announced higher FAK levels. Although carriers continue to manage excess capacity through blank sailings and capacity reductions, weak demand, excess capacity, and geopolitical caution around the Strait of Hormuz are keeping the market reactive, with Drewry expecting further Transpacific rate increases but broadly stable Asia–Europe rates next week.

Figure 20 – Drewry World Container Index ($/40") & Harper Petersen Index



Source: Drewry & Harpex

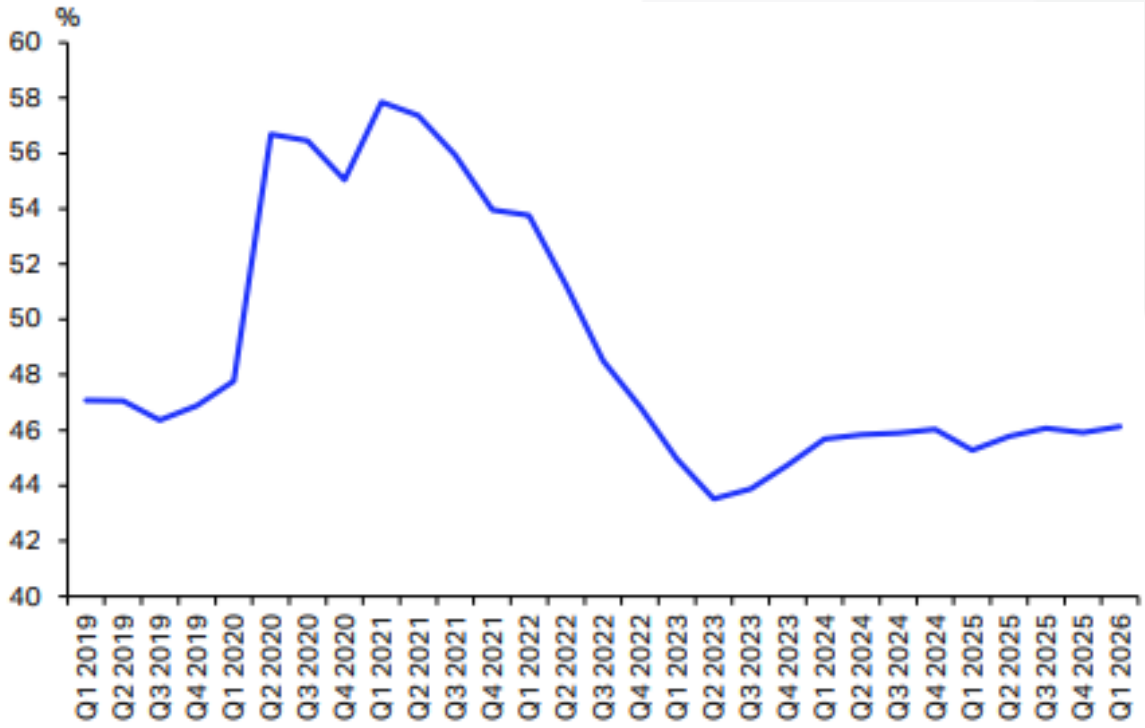
[12] Maritime Executive. 12/05/2026. CMA CGM Pledges $800 Million Funding to Kenya's Mombasa Port.
[13] Maritime Executive. 12/05/2026. Europe Launches 20th Sanctions Round Against Russia.

Meanwhile, charter rates continued to increase, with the *Harpex Petersen Index* up **↑1.3%** (w/w) and is now up by **↑12%** (y/y).

b. Global air cargo industry

According to IATA's Q1 2026 *Quarterly Air Transport Chartbook*, global air cargo demand continued expanding, but momentum eased from late-2025 levels, with industry CTKs up **↑3.4%** (y/y) and international CTKs up **↑3.7%** (y/y). Utilisation remained firm: the seasonally adjusted industry cargo load factor increased by **↑0.8%** to **46.1%**, suggesting demand broadly kept pace with capacity.

Figure 21 – Industry cargo load factor, seasonally adjusted (%)



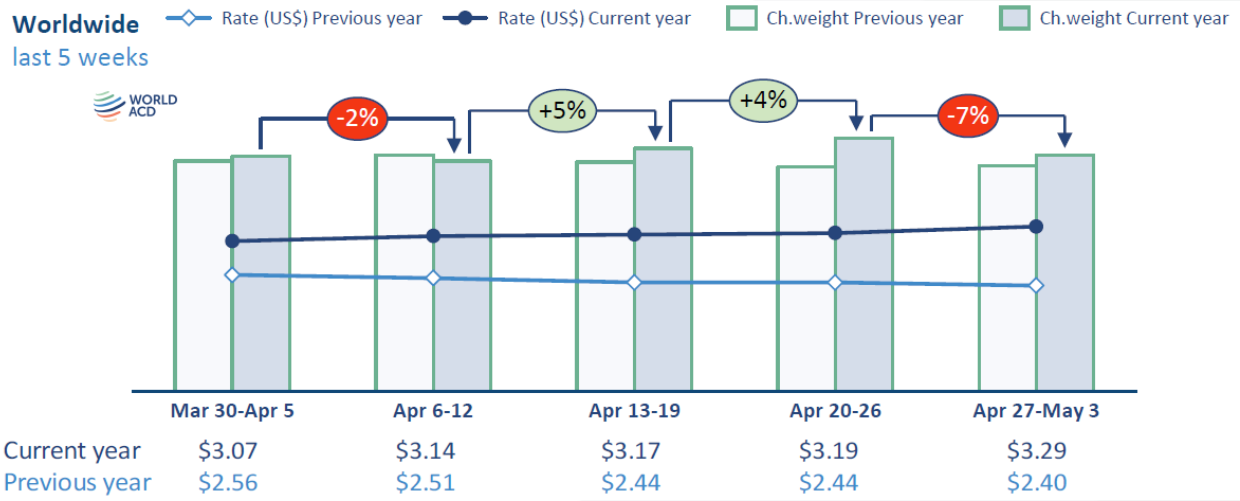
Source: IATA

Capacity also expanded, with international ACTKs rising **↑2.3%** (y/y), led by Asia Pacific at **↑6.3%** and Europe at **↑5.0%**, while Middle Eastern capacity fell **↓10.9%** amid regional disruption. However, cost pressure intensified, with the jet fuel crack spread widening to **$43.5/barrel** in Q1 2026.

For Africa, the signal was weaker than the global average: IATA reports African carrier cargo traffic at **↓0.6%** (y/y) in Q1 2026, while capacity expanded **↑2.7%** (y/y), implying a softer utilisation environment than in the aggregate market. This aligns with the WorldACD weekly data, where Africa-origin capacity was **↑1%** (y/y), but chargeable weight was **↓3%** (y/y), even as rates remained elevated at **↑44%** (y/y).

The high-frequency WorldACD data show that global air cargo softened in week 18, with worldwide chargeable weight falling **↓7%** (w/w) after the Mother's Day flower surge ended and Labour Day holidays weighed on activity. Despite weaker volumes and increased belly hold capacity, pricing continued to strengthen, with the global average rate rising to **$3.29/kg**, up **↑3%** (w/w) and materially above last year's **$2.40/kg**.

Figure 22 – Chargeable weight and rates (past five weeks)



Source: World ACD

Preliminary April results remain more positive: tonnage increased **↑5%** (y/y) after March's **↓4%** decline, while average rates rose **↑28%** (y/y) to **$3.17/kg**. Regional momentum was uneven, with MESA recovering in volume terms but still exposed to renewed Gulf instability and elevated fuel-price-driven pricing.

ENDS [14]

[14]**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.*