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# Cargo Movement Update #284[1]

## ***Date: 31 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)** | 26,374 | 30,047 | **56,421** | 28,902 | 32,927 | **61,829** | **↓9%** |
| **Air Cargo (tons)** | 3,931 | 2,503 | **6,434** | 4,149 | 3,224 | **7,373** | **↓13%** |

## Monthly Snapshot

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

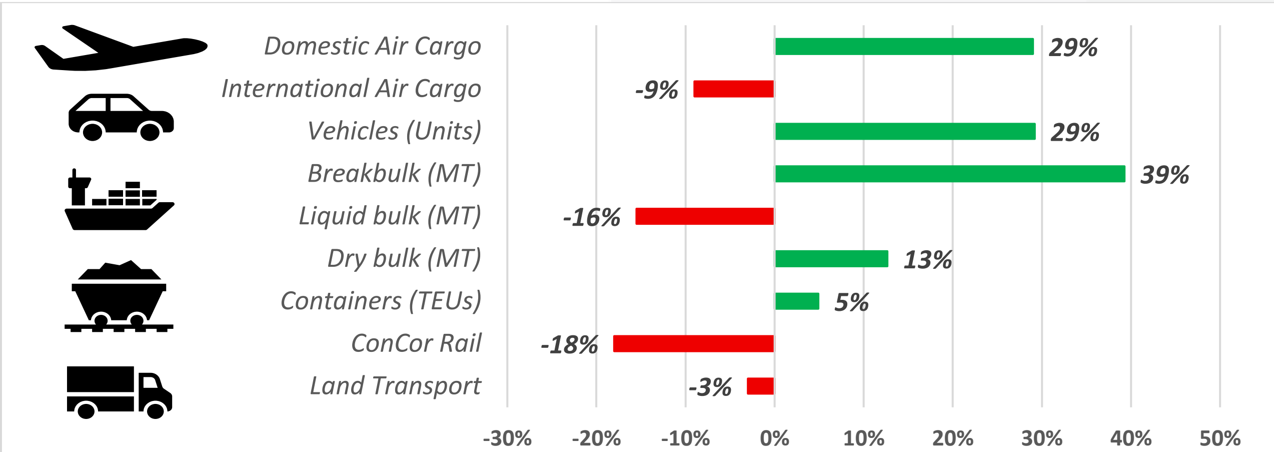
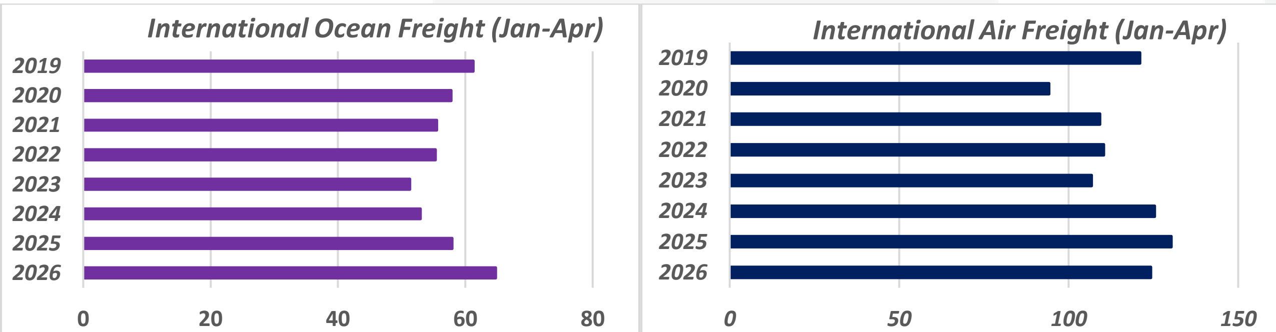



*Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)*




## Key Notes

- An average of **8,060 TEUs** were handled per day, with **7,809 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3,014** containers, up by **↑2%** from last week.
- Cross-border queue: **↑0.8 hrs**; transit: **↑0.7 hrs**; SA borders: **~9.1 hrs** (**↓12%**); SADC: **~6.9 hrs** (**↑17%**).
- Global schedule reliability is up by **↑0.4%** to **62.4% in April 2026**. Ave. late arrivals **↓0.27 days to 5.34 days**.
- Drewry's "*World Container Index*" again jumped by **↑3.2%** to **$2,811/40ft** as predicted last week.
- Global air cargo stable w/w, but **↑5%** y/y; rates **↑50%** y/y to **$3.75/kg**; MESA capacity **↓32%** below pre-war.

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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 *284th* 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: Apr vs. Apr.
[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 **8,060 TEUs** was handled daily, a decrease from **8,833 TEUs** the previous week.

Port performance for the week had mixed results, with a great improvement in operations in the Western Cape in spite of poor weather conditions, along with improved equipment availability at Durban's Pier 1 terminal, leading to stronger landside operations. While the Eastern Cape and the KwaZulu-Natal region, on average, showed a decline in operations, particularly on the waterside. Durban's Gateway Terminal seems to have had quite a strong week, with an estimated **↑10% increase** in waterside volumes from the previous week. Lastly, TNPA's **25-year agreement** with **Ukwanda LNG** for an onshore LNG regasification facility at Ngqura further positions the port as a strategic energy node supporting gas-to-power, energy security and port-linked industrial development (more on this development below).

Global shipping conditions remain dominated by geopolitical disruption, uneven reliability improvements and renewed pricing momentum. The Strait of Hormuz remains a **high-risk but partially functioning** corridor, with limited tanker and LNG movements, reduced predictability, selective vessel passage and elevated risk pricing across crude, LNG and refined-product trades. Wider regional risks also persist, with the *MSC Sariska V* struck near Umm Qasr. At the same time, UNCTAD estimates that Hormuz-linked oil shocks could add around **$20 billion** annually to the import bill of vulnerable economies. In the Red Sea, Suez transits remained subdued, with **46 containerships** passing through in the two weeks to **31 May**, down **↓15%** from the previous fortnight.

Global schedule reliability improved to **62.4%** in April, the highest level this year, while late-vessel delays eased to **5.34 days**. Equipment availability remains adequate, with **1.2 million TEU** of new boxes in China, despite record production of **7.85 million TEU** in 2024. Freight rates also firmed, with *Drewry's WCI* up **↑3.2%** to **$2,811/FEU**, although carrier profitability remains compressed, with Q1 EBIT down to **$1.35 billion** from **$5.47 billion** a year earlier.

This week's international cargo flows decreased significantly after last week's stellar week. The daily average amounted to **~561,500 kg** inbound (**↓5%**, w/w) and **~358,000 kg** outbound (**↓22%**). Current volumes to and from ORTIA are slightly above the commensurate volumes of May last year (**↑3%**) – but slightly below the pre-pandemic May of 2019 (**↓3%**).

Global air cargo markets stabilised in mid-May, with tonnages flat week-on-week but around **↑2%** above last year. Demand remains supported by elevated supply-chain lead times, shipping disruption, and stockpiling. Rates remain materially elevated, with full-market rates at **$3.23/kg** and spot rates **↑50%** higher year-on-year, while Gulf-related capacity constraints persist.

FIATA has called for a review of IATA's proposed changes to the *Direct Air Waybill* framework, cautioning that the amendments could materially affect liability, indemnity and operational risk allocation across the air cargo chain ahead of the planned **1 July 2026** implementation.

On the N4 corridor, movements increased slightly for heavy-goods vehicles as trains from KM4 to Maputo (an average of **2 trains per day**) were stable. Truck volumes through the border post increased slightly to **1,615 HGVs per day** (**↑4%**, w/w). Overall, queue times increased slightly to an average of **~3.9 hours** (**↑5%**) at the border. The average processing times also slightly increased to an average of **~3.5 hours** (**↑3%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time increased by almost **an hour** from last week, as transit time also increased, this week by about **three-quarters of an hour**. The median border crossing times at South African borders decreased by **an hour and a quarter** on average, averaging **~9.1 hrs** (**↓12%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) increased by approximately **an hour**, averaging **~6.9 hrs** (**↑17%**). This week, on average, **three** SADC borders took more than a day to cross, namely Chirundu OSBP, Kasumbalesa (the worst affected, taking around **three days** to cross from the **Zambian side**) and Katima Mulilo.

Cross-border road freight operational constraints persisted during the week, with several border posts and corridors experiencing disruptions, congestion, and security concerns. Notably, these included **(1)** limited operational impact from the planned ATDF shutdowns following the reported arrest of a prominent member, **(2)** temporary disruptions at Kopfontein and Skilpadshek due to sewage and power-related issues, respectively, and **(3)** persistent corridor constraints in the DRC and Zambia, including renewed concerns over DRC local participation enforcement, a reported 18 km queue between Kasumbalesa and Kanyaka, and a 12 km northbound queue at Kazungula.

In summarising this edition, our attention turns to the continuation of restructuring South Africa's logistics network, notably the Ngqura LNG concessioning agreement. This development should be read as a strategic energy-logistics investment rather than a narrow port-operational development, particularly given South Africa's material exposure to external fuel shocks: since January 2025, imports have accounted for **83%** of total liquid bulk handled at SA ports, equivalent to approximately **100,400 kilolitres per day**. Concentration risk remains significant, with **Durban handling 67%** of liquid-bulk imports, followed by **Saldanha at 15%** and **Mossel Bay at 7%**; in April, Durban's imports declined by **↓38%** (m/m) to **1.282 million kilolitres**, even as Richards Bay and Saldanha increased by **↑26%** and **↑20%**, respectively. While not a near-term hedge against Hormuz-linked fuel volatility, Ngqura supports longer-term supply optionality, private-capital mobilisation, port-linked industrialisation and the repositioning of ports as integrated infrastructure platforms.

# 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 25 to 31 May (measured in TEUs)*

| 7-day flow reported (25/05/2026 – 31/05/2026) | | | |
|---|---|---|---|
| **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)** | 1,956 | 13,693 | ↓9% |
| **Cape Town Container Terminal** | 2,675 | 18,727 | ↑25% |
| **Ngqura Container Terminal** | 2,083 | 14,584 | ↓25% |
| **Port Elizabeth Container Terminal** | 733 | 5,132 | ↓32% |
| **Other** | 612 | 4,285 | ↓11% |
| **Total** | **8,060** | **56,421** | **↓9%** |

*Source: Calculated from TPT, 2026. Updated 31/05/2026.*

An average of **~8,060 TEUs** (↓9%) was handled per day for the last week (*25 to 31 May,* ***Error! Reference source not found.***). Consequently, throughput was above the projected average of **~7,791 TEUs** (↑3% actual versus projected). For the coming week, a decreased average of **~7,809 TEUs** (↓3%) is predicted to be handled (*1 to 7 June*, *Table 3*).

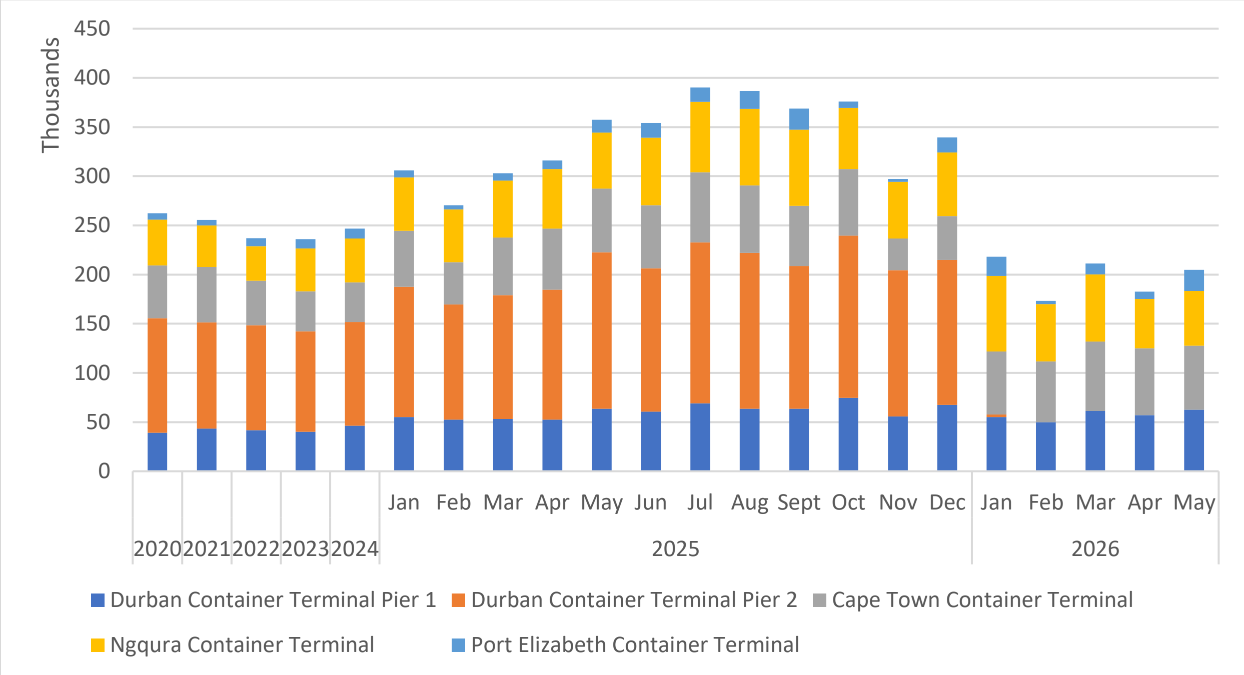
*Table 3 – Container Ports – Weekly flow projected for 1 to 7 June (measured in TEUs)*

| 7-day flow projected (01/05/2026 – 07/06/2026) | | | |
|---|---|---|---|
| **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)** | 2,105 | 14,733 | ↑8% |
| **Cape Town Container Terminal** | 2,289 | 16,025 | ↓14% |
| **Ngqura Container Terminal** | 2,163 | 15,142 | ↑4% |
| **Port Elizabeth Container Terminal** | 426 | 2,982 | ↓42% |
| **Other** | 826 | 5,784 | ↑35% |
| **Total** | **7,809** | **54,666** | **↓3%** |

*Source: Calculated from TPT, 2026. Updated 31/05/2026.*

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 31/05/2026.*

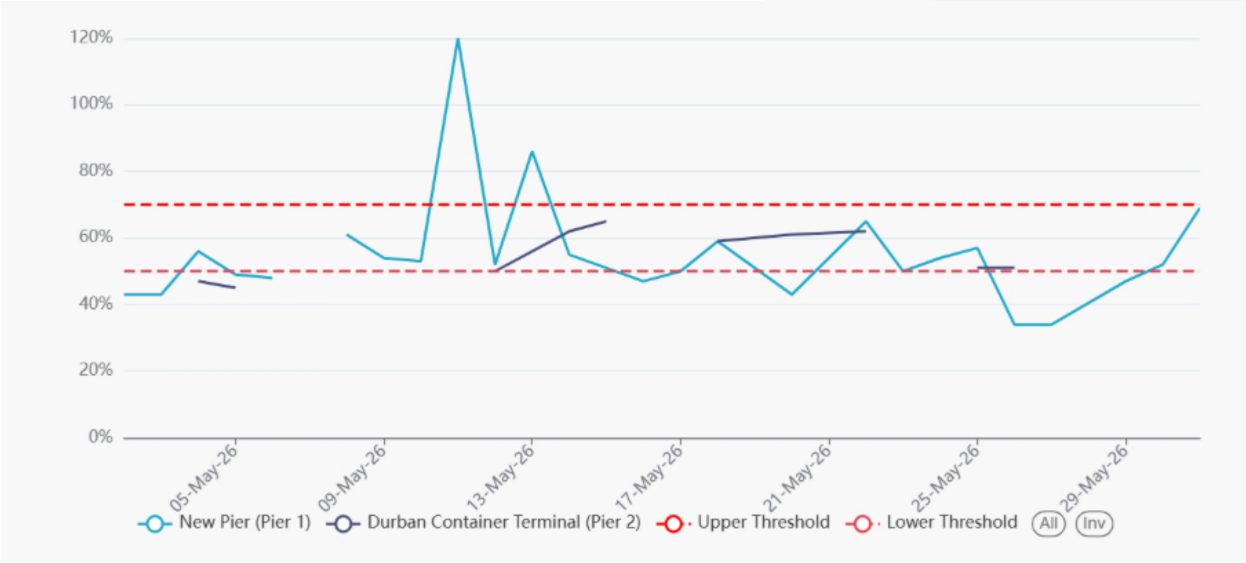
The following table shows the average vessel time (in days) at anchorage and the average time at berth (in days) at our respective ports and terminals as of Wednesday:

*Table 4 – Vessel Dwell Time*

| Port | Terminal | Average Time at Anchorage (days) | Average Time at Berth (days) |
|---|---|---|---|
| Cape Town | CTCT | 0.0 | 1.8 |
| Cape Town | FPT | - | 2.5 |
| Cape Town | MPT | - | 0.6 |
| Durban | Pier 2 | 1.1 | 2.7 |
| Durban | Pier 1 | 0.7 | 1.9 |
| East London | MPT | 3.3 | 3.9 |
| Ngqura | NCT | 1.3 | 2.8 |
| Port Elizabeth | PECT | 0.7 | 1.7 |

*Source: Calculated from Marine Traffic AIS data, 2026. Updated 03/06/2026.*

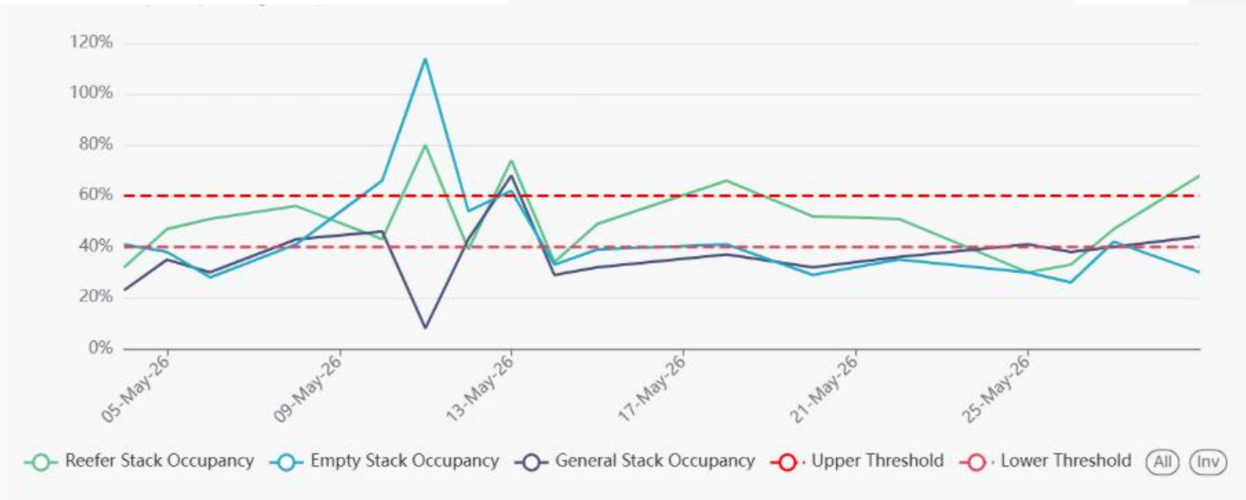
*Figure 4 – Stack occupancy in Durban, general-purpose containers (1 May to present; day on day)*




*Source: Calculated using data from Transnet, 2026, and updated 31/05/2026.*

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 (1 May to present, day on day)*




*Source: Calculated using data from Transnet, 2026, and updated 31/05/2026.*

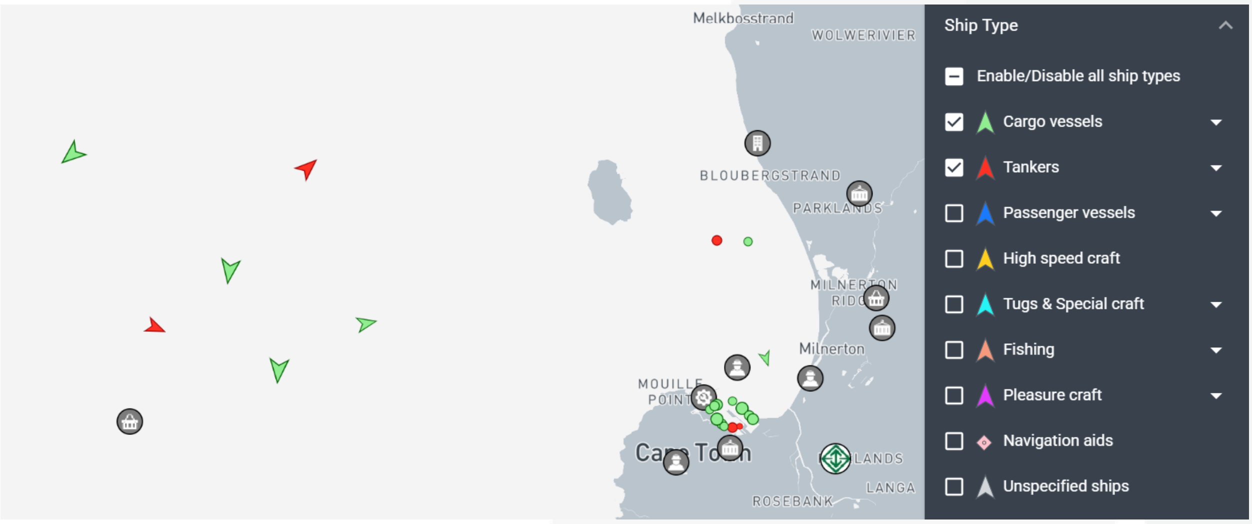
## b. Summary of port operations

### i. Cape Town

The Cape Town Container Terminal experienced a strong increase in waterside volumes from the previous week. Vessel delays remained minimal, with an average time at anchorage of two hours and 46 hours at berth. Over the past week, the terminal reported an average of eight out of 9 cranes and 28 out of 32 RTGs available. Weather delays were reported towards the end of the week.

Cape Town Multi-Purpose Terminal experienced a significant decline in activity, with waterside volumes down by 65% from the previous week, and limited vessel activities and minimal operational movement. The terminal reported an average of two out of three cranes and four out of five straddle carriers available throughout the week.

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




*Source: Marine Traffic. Updated 31/05/2026 at 14:00.*

### ii. Durban

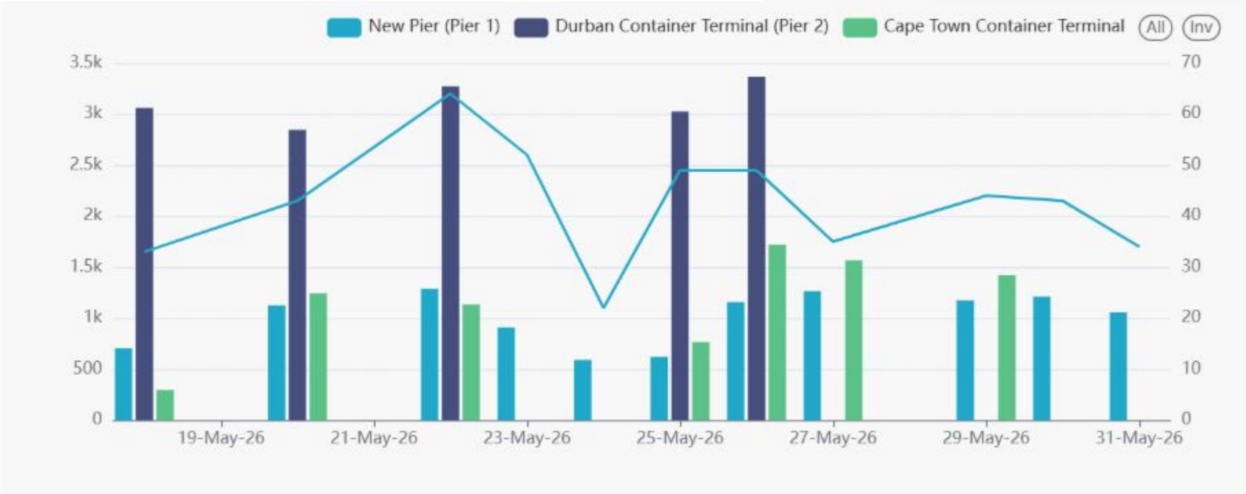
Pier 1 reported a slight decline in waterside volumes compared to the previous week. Despite lower waterside activity, landside activity and truck turnaround times remained stable. Vessels spend an average of 27 hours at anchorage and 63 hours at berth. Over the week, the terminal reported an average equipment availability of five out of seven cranes and 20 out of 25 RTGs, significantly higher than the usual 15-17 RTGs available. The higher RTG availability is likely the cause of the improved landside operations. The **TTT** for the week averaged **~38 minutes** (**↓5%**, w/w), and the average **staging time** was **~24 minutes** (**↓14%**).

Durban Gateway Terminal recorded a busy week, with estimated throughout increasing to approximately **36,000 containers** for the week (a daily average of **3,610 container** moves, up **↑10%** from the previous week's estimated 3,286). The terminal reported strong landside volumes, especially towards the start of the week. Vessels spent an average of 33 hours at anchorage and 73 hours at berth.

Authorities continued to monitor traffic conditions on Bayhead Road throughout the week. While congestion remains a concern in the area, no impacts associated with the anticipated national shutdown were reported over the weekend in the Bayhead area.

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.

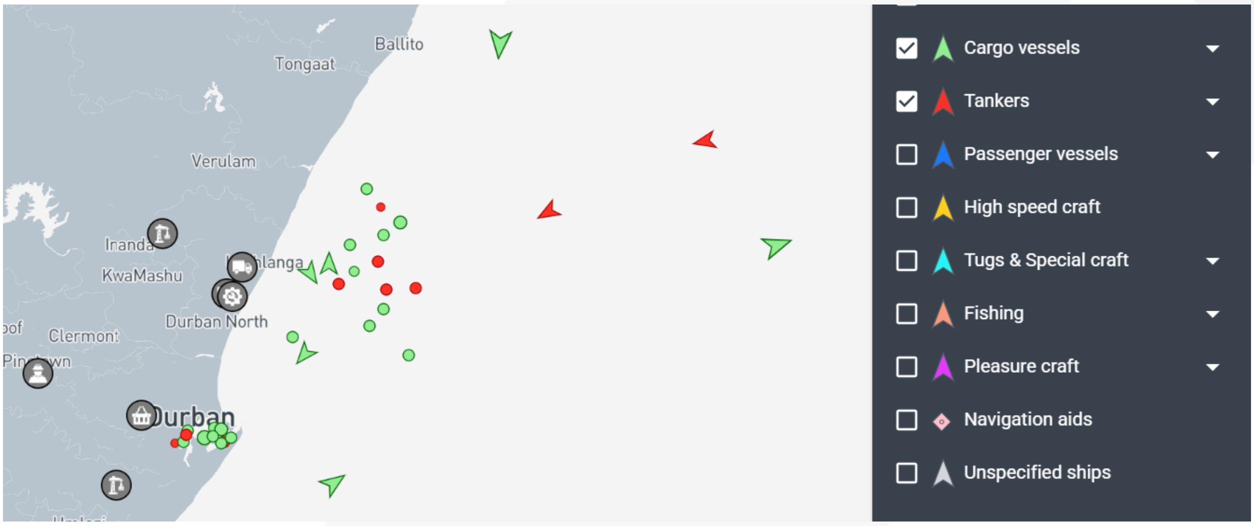
*Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)*




*Source: Calculated using data from Transnet, 2026, and updated 31/05/2026.*

The queue of container vessels waiting outside Durban **was stable** this week. On Wednesday afternoon (3 June), **six** container vessels were waiting outside at anchorage for Durban, **four** for Pier 1 and **two** for DGT. The queue of dry (**seven**), liquid (**seven**), and breakbulk (**zero**) **was stable** from last week:

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




*Source: Marine Traffic. Updated 31/05/2026 at 14:00.*

### iii. Eastern Cape

Ngqura Container Terminal experienced a significant decline in waterside volumes over the past week. Minor operational delays, including weather disruptions, impacted vessel movements. Though Ngqura's pilot boat was out of commission for a significant portion of the week, the use of a privately owned pilot boat ensured that vessel movement delays were minimal. Vessels spent an average of 21 hours at anchorage and 44 hours at berth. Equipment availability remained strong, with seven out of eight cranes and 24 out of 30 RTGs available on average throughout the week.

TNPA has signed a **25-year terminal operator agreement** with **Ukwanda LNG** to develop an onshore LNG regasification facility at the **Port of Ngqura**, following a Section 79 directive authorising the Strategic Fuel

Fund's participation in the project. The development positions Ngqura as a strategic energy node for the Eastern Cape. It is intended to support South Africa's gas-to-power programme, energy security objectives, and wider industrial development linked to port-based energy infrastructure.[6]

Port Elizabeth Container Terminal also recorded a decline in waterside volumes. In addition to weather disruptions, the terminal experienced further delays linked to equipment breakdowns. Vessels spent an average of 47 hours at anchorage and 53 hours at berth. In spite of equipment breakdowns, average equipment availability was reported at three out of three cranes (two STS and one MHC), and 10 out of 11 straddle carriers throughout the week.

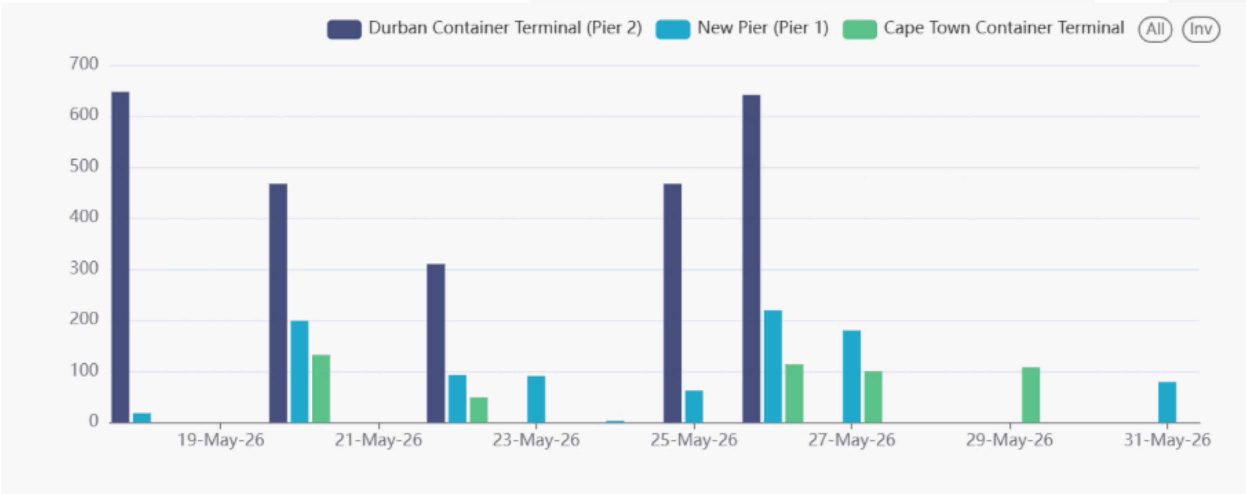
### iv. Richards Bay

The daily average coal throughput for the week increased again and averaged a very high **207,000 tons** (**↑6%**, w/w) a day. An average of **25 trains** was serviced on the landside (constant from last week's **25**), and **above the target** (**22** trains).

### v. Transnet Freight Rail (TFR)

In the last week (*25 to 31 May*), rail cargo on the ConCor line out of Durban was reported at **3,014** containers, up by **↑2%** from the previous week's **2,955** containers.[7]

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




*Source: Calculated using data from Transnet, 2025. Updated 31/05/2026.*

[6] Creamer, T. 28/05/2026. TNPA signs 25-year LNG terminal agreement for Port of Ngqura.
[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.

## 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 (*25 to 31 May*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *May 2025* averaged **~889,012 kg**.

*Table 5 – International inbound and outbound cargo from OR Tambo*

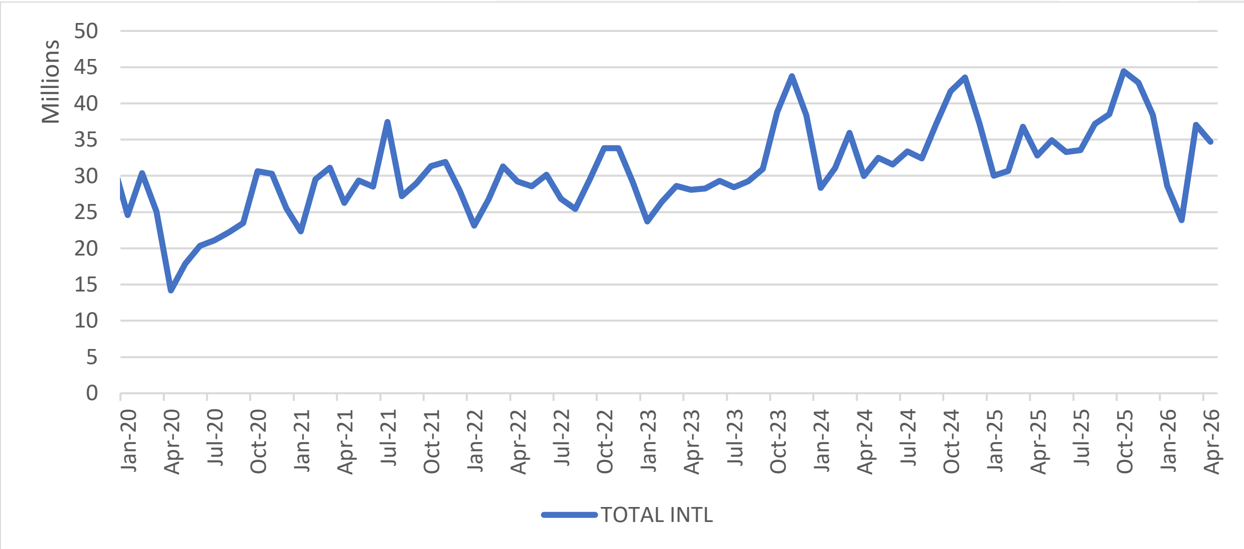
| Flows | Daily Ave. | Weekly Vol. | Change (w/w) |
|---|---|---|---|
| Volume inbound | 561,530 | 3,930,709 | ↓5% |
| Volume outbound | 357,634 | 2,503,437 | ↓22% |
| Total | 919,164 | 6,434,146 | ↓13% |

*Courtesy of ACOC. Updated: 31/05/2026.*

This week's international cargo flows decreased significantly after last week's stellar week.[8] The daily average amounted to **~561,500 kg** inbound (**↓5%**, w/w) and **~358,000 kg** outbound (**↓22%**). Current volumes to and from ORTIA are slightly above the commensurate volumes of May last year (**↑3%**) – but slightly below the pre-pandemic May of 2019 (**↓3%**).

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: 26/05/2026.*

The latest reported fuel stock days per airport figures indicate:

- ORTIA: 11.3 days
- CTIA: 4.3 days
- Durban: 22 days

[8] Air cargo last week averaged 593,000 kg inbound and 461,000 kg outbound.

## 3. Road and Regional Update

### a. Lebombo border post update

In the last week (*25 to 31 May)*, movements increased slightly for heavy-goods vehicles as trains from KM4 to Maputo (an average of **2 trains per day**) were stable.

- Truck volumes through the border post increased slightly to **1,615 HGVs per day** (**↑4%**, w/w).
- Overall, queue times increased slightly to an average of **~3.9 hours** (**↑5%**) at the border.
- The average processing times also slightly increased to an average of **~3.5 hours** (**↑3%**) per crossing.

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

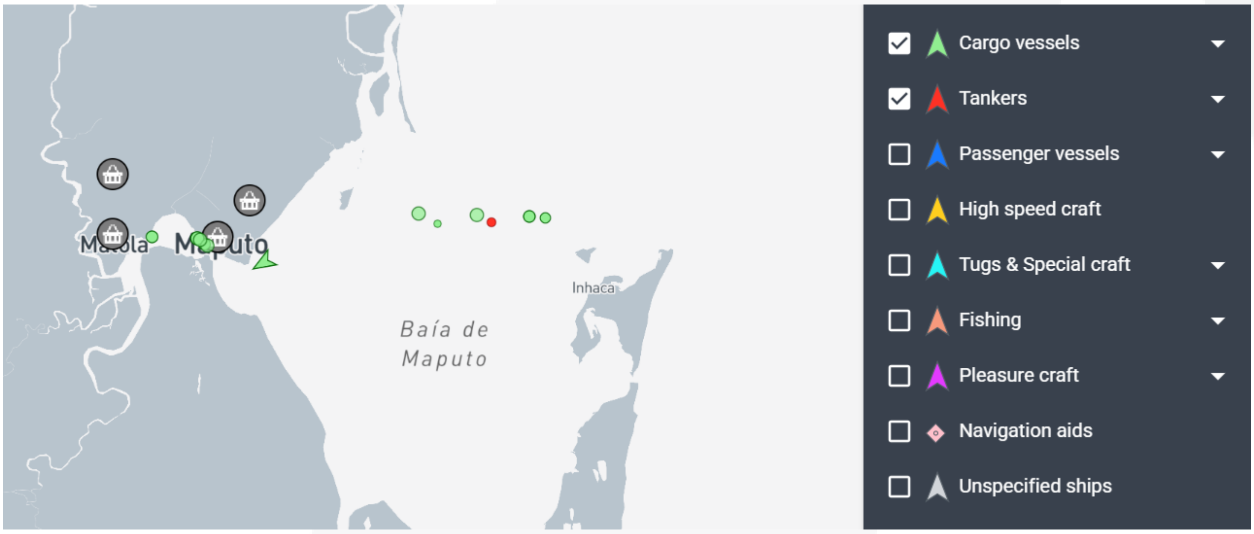
*Table 6* – Lebombo border post update

| | Trucks Entering KM4 | Trucks Exit KM4 | Mineral Trucks | General Cargo | Micro Importers | Export (full) | Fuel Tankers | Trucks staging in KM4 |
|---|---|---|---|---|---|---|---|---|
| Average | 1,615 | 1,545 | 1,221 | 218 | 42 | 82 | 46 | 247 |
| % (w/w) | **4%** | **4%** | **5%** | **3%** | **14%** | **2%** | **-4%** | **-16%** |

*Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 31/05/2026.*

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 31/05/2026 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 almost **an hour** from last week, as transit time also increased, this week by about **three-quarters of an hour**.
- The median border crossing times at South African borders decreased by **an hour and a quarter** on average, averaging **~9.1 hrs** (**↓12%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by approximately **an hour**, averaging **~6.9 hrs** (**↑17%**).

1. **ATDF-related disruption risk** remained present but appears to have had limited operational impact.
    a. ATDF had indicated that it would proceed with planned shutdowns on key national routes, including the N3 and N2, as well as in KwaZulu-Natal.
    b. However, following the reported arrest of a prominent member on Saturday for inciting violence, little material disruption was observed.
2. **Kopfontein** temporarily suspended operations on Monday, 25 May, due to a sewage spill affecting office facilities.
    a. Operations reportedly resumed by 11:30 on Tuesday.
3. **Skilpadshek** experienced power disruptions on Friday.
    a. Processing was reportedly not affected, as officials implemented alternative arrangements.
4. **DRC local participation enforcement** remains a concern.
    a. Authorities are reportedly enforcing the 50% local participation requirement by pressuring foreign transporters to cede market share to Congolese operators or requiring companies to terminate contracts with non-compliant operators.
5. **Kasumbalesa–Kanyaka** remained severely constrained, with the queue measured at approximately **18 km** on Tuesday.
    a. Concerns were again raised with the local Governor regarding the scanner at Kanyaka, amid reports that drivers were still being charged despite indications that the scanner may not be operating properly.
    b. Reported observations included no audible scanner activity, trucks passing at speeds above 10 km/h, and no results sheets being produced.
    c. The extended northbound queue between Kanyaka and Kasumbalesa has materially increased driver exposure to theft, intimidation, and security risks in the DRC.
6. **Kazungula northbound** recorded a queue of approximately **12 km** on Tuesday morning.
    a. ZRA officials reportedly worked along the queue to verify compliance and issue stickers to checked trucks.
    b. Verified trucks were then permitted to bypass sections of the queue and enter the border by number, with ZRA returning to the last verified truck approximately every four hours.

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

*Table 7 – Delays[9] summary – South African borders[10] (both directions)*

| Border Post | Direction | HGV[11] 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 | 597 | 20.1 | 4.5 | 20.0 | 17,910 | 4,179 |
| Beitbridge | Zimbabwe-SA | 537 | 4.4 | 1.3 | 4.2 | 16,110 | 3,759 |
| Groblersbrug | SA-Botswana | 230 | 18.9 | 2.4 | 18.5 | 6,900 | 1,610 |
| Martin's Drift | Botswana-SA | 145 | 3.3 | 0.6 | 3.2 | 4,350 | 1,015 |
| Kopfontein | SA-Botswana | 184 | 7.6 | 2.1 | 7.4 | 5,520 | 1,288 |
| Tlokweng | Botswana-SA | 59 | 0.8 | 0.2 | 0.5 | 1,770 | 413 |
| Vioolsdrift | SA-Namibia | 30 | 5.9 | 1.4 | 5.6 | 900 | 210 |

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

| Border Post | Direction | HGV[11] Arrivals per day | Queue Time (hours) | Border Time – Best 5% (hours) | Border Time – Median (hours) | Est. HGV Tonnage per day | Weekly HGV Arrivals |
|---|---|---|---|---|---|---|---|
| Noordoewer | Namibia-SA | 20 | 2.9 | 0.4 | 2.5 | 600 | 140 |
| Nakop | SA-Namibia | 30 | 5.7 | 1.1 | 5.5 | 900 | 210 |
| Ariamsvlei | Namibia-SA | 20 | 1.7 | 3.0 | 1.4 | 600 | 140 |
| Skilpadshek | SA-Botswana | 297 | 9.4 | 3.5 | 9.2 | 8,910 | 2,079 |
| Pioneer Gate | Botswana-SA | 86 | 1.7 | 1.0 | 1.4 | 2,580 | 602 |
| Ramatlabama | SA-Botswana | 171 | 3.6 | 1.0 | 3.3 | 5,130 | 1,197 |
| Ramatlabama | Botswana-SA | 76 | 0.5 | 0.2 | 0.3 | 2,280 | 532 |
| Lebombo | SA-Mozambique | 1,555 | 3.9 | 1.1 | 3.5 | 46,650 | 10,885 |
| Ressano Garcia | Mozambique-SA | 1,432 | 2.4 | 0.3 | 2.2 | 42,960 | 10,024 |
| **Sum/Average** | | **5,469** | **5.8** | **1.5** | **5.6** | **164,070** | **38,283** |

*Source: Calculated from* [TransAfricaBorder]() & Crickmay*, week ending 24/05/2026.*

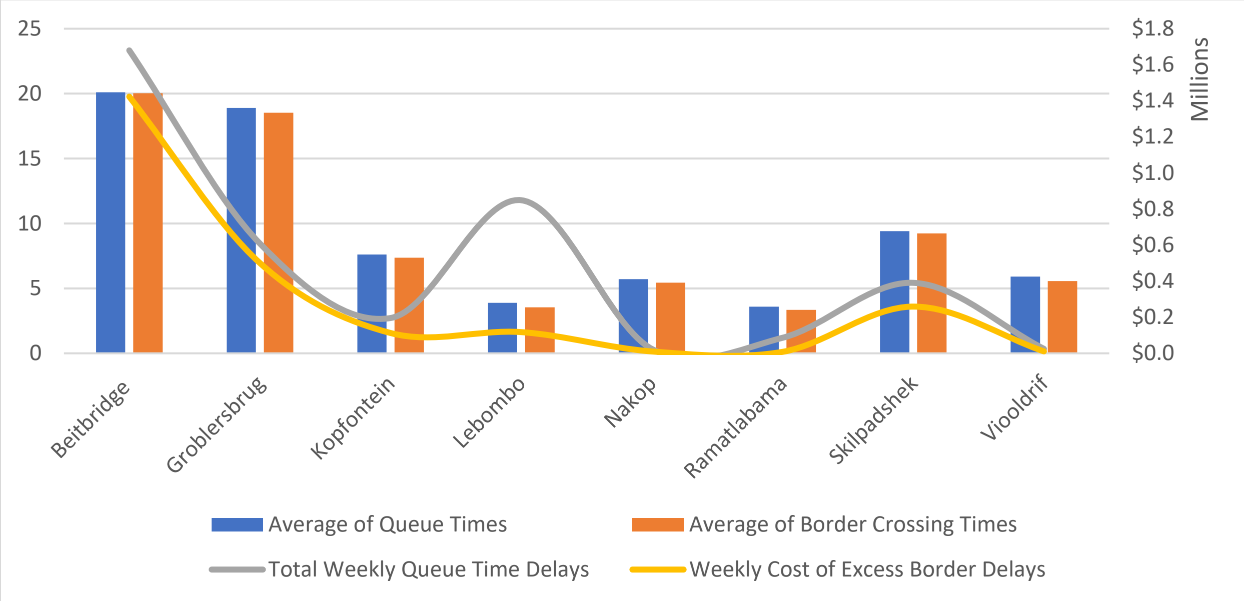
*Table 8 – Delays summary – Corridor perspective*

| 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 | 8.0 | 2.8 | 7.8 | 9,600 | 2,240 |
| **Central Corridor** | 798 | 4.6 | 0.8 | 4.5 | 23,940 | 5,586 |
| **Dar Es Salaam Corridor** | 1,819 | 17.0 | 4.0 | 17.0 | 54,570 | 12,733 |
| **Maputo Corridor** | 2,987 | 3.2 | 0.7 | 2.9 | 89,610 | 20,909 |
| **Nacala Corridor** | 127 | 0.0 | 0.0 | 0.0 | 3,810 | 889 |
| **North/South Corridor** | 3,634 | 15.1 | 2.8 | 15.2 | 109,020 | 25,438 |
| **Northern Corridor** | 2,817 | 0.3 | 0.1 | 0.3 | 92,520 | 21,588 |
| **WBNLD Corridor** | 903 | 3.7 | 1.1 | 3.5 | 27,090 | 6,321 |
| **Trans Cunene Corridor** | 100 | 4.1 | 1.5 | 3.7 | 3,000 | 700 |
| **Trans Kalahari Corridor** | 100 | 0.0 | 0.0 | 0.0 | 3,000 | 700 |
| **Trans Oranje Corridor** | 116 | 20.7 | 2.5 | 20.3 | 3,480 | 812 |
| **Sum/Average** | **13,721** | **7.2** | **1.5** | **7.1** | **419,640** | **97,916** |

*Source: Calculated from* [TransAfricaBorder]() & Crickmay*, week ending 24/05/2026.*

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

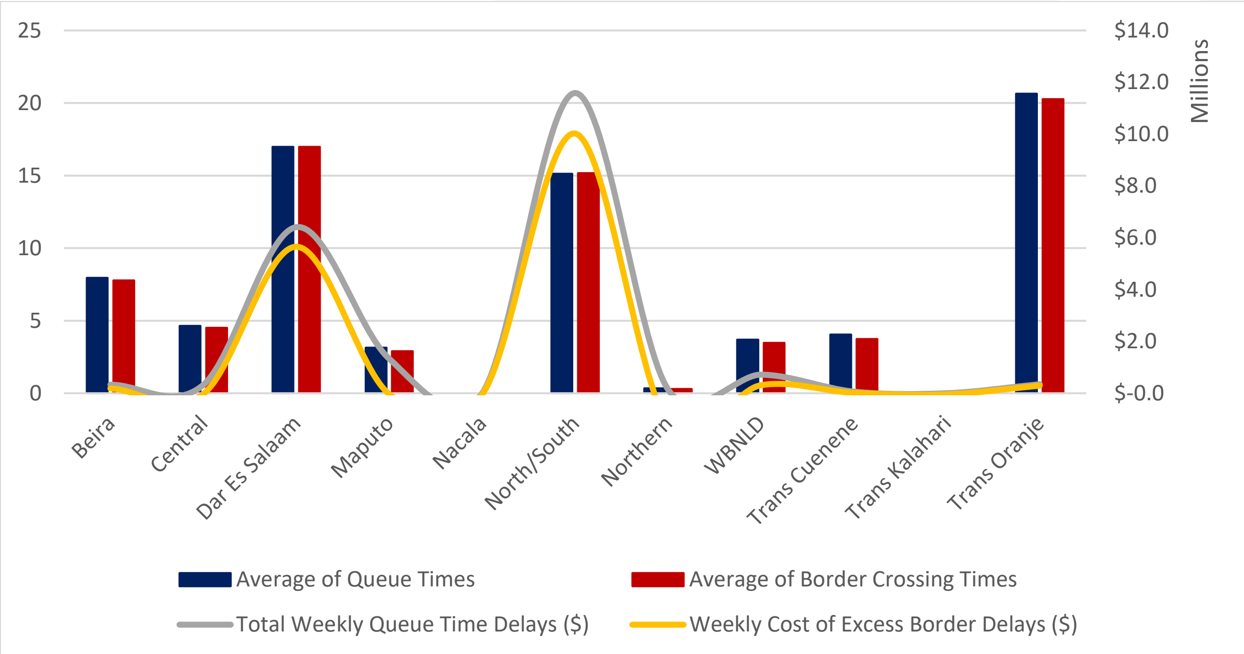
*Figure 12 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)*




*Source: Calculated from* *TransAfricaBorder* & *Crickmay* *week ending 24/05/2026.*

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 24/05/2026.*

In summary, cross-border queue time averaged **~7.2 hours** (up by **~0.8 hours** from the previous week's **~6.4 hours**), indirectly costing the transport industry an estimated **$21.3 million** (**R345 million**). Furthermore, the week's average cross-border transit times hovered around **~7.1 hours** (up by **~0.7 hours** from the **~6.4 hours** recorded in the previous report), at an indirect cost to the transport industry of **$15.2 million** (**R246 million**). The total indirect cost for the week amounts to an estimated **~$36.4 million** (**R591 million**, up by **↑21%** from the **~R489 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

As has been the case over the last few weeks, the Strait of Hormuz remains **a high-risk – but partially functioning maritime corridor**, with shipping activity still heavily constrained by the renewed military confrontation and uncertain diplomatic track. Reuters reports that only limited movements have recently been observed, including two oil-product tankers exiting the Strait and an LNG carrier loading in the UAE after an AIS-dark inbound transit.[12] Several QatarEnergy-linked LNG carriers have also moved toward the Strait, suggesting cautious positioning for a possible reopening or easing of restrictions. However, the operating environment remains fragile: fresh US–Iran exchanges around Qeshm Island and regional missile activity have increased the probability of further delays, higher war-risk premiums, reduced tanker availability, and more volatile fuel procurement schedules. For shipping markets, the ongoing narrative remains **(1)** reduced predictability, **(2)** selective vessel passage, and **(3)** elevated risk pricing across crude, LNG, and refined-product trades.

Similar to last week, the risk to commercial shipping is not limited to energy cargoes transiting Hormuz, as MSC has confirmed that the *MSC Sariska V* was struck by two projectiles while departing Umm Qasr, with the carrier condemning the attack as an unjustified threat to seafarers and essential maritime trade in the region.[13]

UNCTAD warns that disruption in the Strait of Hormuz is transmitting directly into the global energy system, with higher oil and refined-product prices raising freight, fuel, inflation and fiscal pressures across vulnerable economies. The burden is concentrated among oil-importing LDCs and SIDS: **65 of 75 vulnerable economies** depend on imported oil, affecting nearly **1 billion people**, with the shock potentially adding around **$20 billion annually** to their oil-import bill.[14]

Elsewhere, the Red Sea also remains subdued compared to yesteryear. Drewry reports that the number of containerships sailing via the Suez Canal **totalled 20** in the week ended 24 May and 26 in the week ended 31 May, according to the "*Red Sea Diversion Tracker*". Therefore, in the 2 weeks ended 31 May, 46 containerships transited through Suez, down **↓15%** down from the previous fortnight but higher than in the weeks which followed the start of the Iran conflict.

#### ii. Schedule reliability

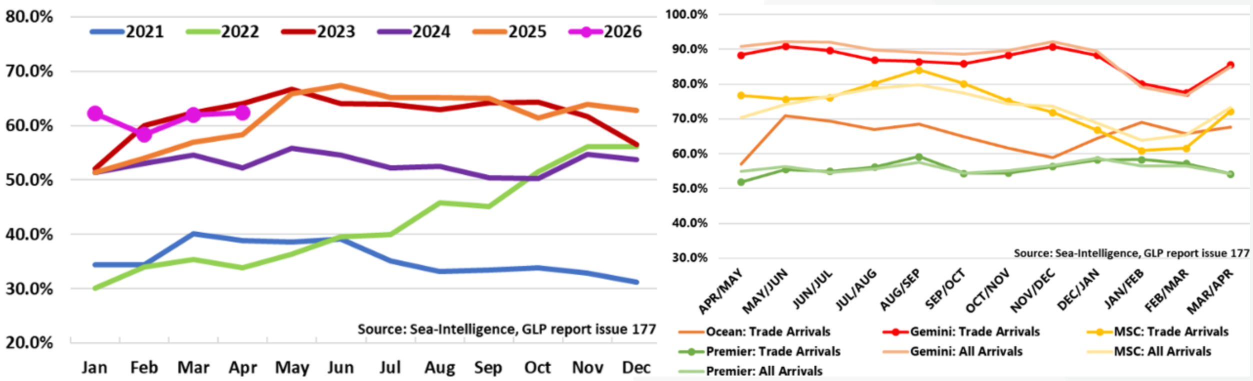
Sea-Intelligence's latest Global Liner Performance update shows global schedule reliability improved by **↑0.4%** (m/m) to **62.4% in April 2026**, the highest level recorded so far this year and **↑4%** higher **year-on-year**. Average delays for late vessel arrivals also improved, falling by **0.27 days to 5.34 days**, although still **0.31 days worse year-on-year**. Among the top 13 carriers, **Maersk led at 76.1%**, followed by **Hapag-Lloyd at 75.1%**, while **Wan Hai ranked lowest at 39.6%**:

[12] Chow, E. 02/06/2026. Oil products shipments exit Hormuz, LNG tanker loads at UAE.

[13] Hand, M. 02/06/2026. MSC confirms strike on MSC Sariska V, condemns unprovoked attacks.

[14] UNCTAD. 01/06/2026.Strait of Hormuz Disruptions: The burden of oil price shocks on vulnerable economies.

*Figure 14 – Global Schedule Reliability (LH) & Alliance East/West Schedule Reliability*

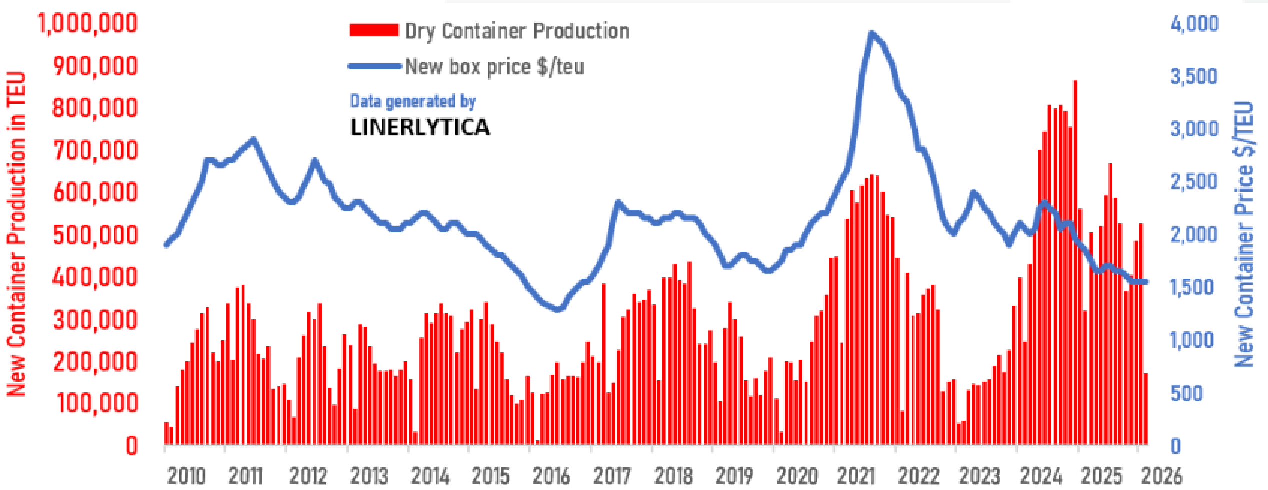



*Source: Sea Intelligence*

### iii. Container production reached record highs in 2021 and 2024 despite alleged price fixing

Linerlytica reports that container equipment availability remains adequate despite the stronger demand environment, with more than **1.2 million TEU** of new box inventory currently available in China, compared with a peak of **1.8 million TEU** last year. The update also notes that new container production reached record levels in both **2021** and **2024**, notwithstanding recent US Department of Justice allegations that six major Chinese container manufacturers restricted production and fixed dry-container prices between **November 2019 and January 2024**. According to Linerlytica's assessment, the 2021 price spike was primarily driven by pandemic-era demand, with production rising to a then-record **6.61 million TEU**. This was exceeded in 2024, when **7.85 million TEU** of new boxes were added as Red Sea diversions and associated network disruption lifted equipment demand.

*Figure 15 – Dry container production and new box price ($/TEU)*

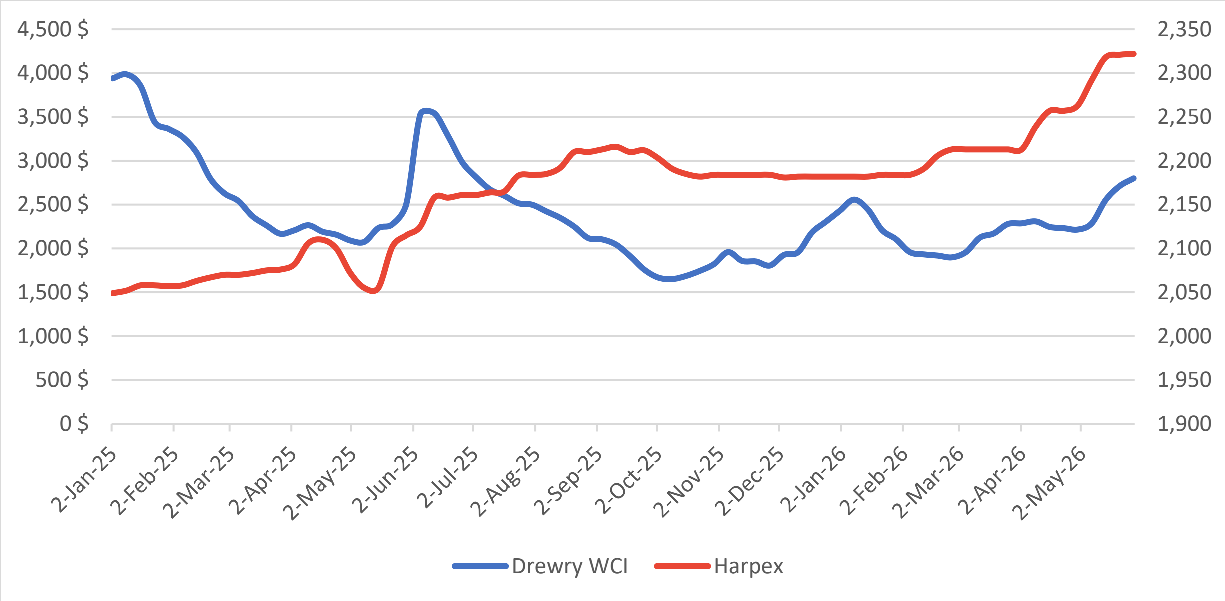



*Source: Linerlytica*

### iv. Container freight rates

Last week, Drewry's "*World Container Index*" again jumped by **↑3.2%** to **$2,811 per 40ft container**. As predicted last week, rising global supply-chain pressure is now beginning to translate into renewed upward pressure on spot freight rates, with the latest increase reinforcing the relationship between disruption intensity, effective capacity absorption, and pricing power.

*Figure 16 – World Container Index ($/FEU) & Harper Petersen Charter Index*




*Source: Calculated from Drewry & Harpex*

However, the transmission remains conditional rather than automatic: rates are likely to rise most sharply where rerouting, congestion, equipment imbalances, or weakened schedule reliability materially constrain available capacity. In this context, rising GSCPI levels continue to point to increased upward risk for freight rates, particularly if current pressures persist over the coming weeks.

Linerlytica this week confirms our analysis, and reported: "*The strong container freight rate momentum looks set to last at least until the end of July as carriers continue to cash in on the high peak season demand to push another series of rate hikes in mid-June following the successful 1 June rate increase and peak season surcharge application with the freight futures markets pricing in a July market peak*."[15]

Lastly, in following up on the carrier profit landscape mentioned across the last two weeks, Sea-Intelligence reports that 2026-Q1 has so far produced a materially weaker financial result for the major container lines, with combined EBIT falling to **$1.35 billion**, compared with **$5.47 billion** in 2025-Q1. The deterioration was not primarily volume-driven, as transported volumes remained relatively resilient, but rather reflected a sharp decline in average freight rates of **↓9%** to **↓26%** (y/y) across reporting carriers, which — when combined with higher operating costs — pushed several lines into negative EBIT territory. This is also visible in earnings per TEU, with Sea-Intelligence noting a broad-based compression in operating profitability per unit, confirming that the latest rate recovery is occurring from a much weaker earnings base than the market experienced through most of 2024 and early 2025 [16]

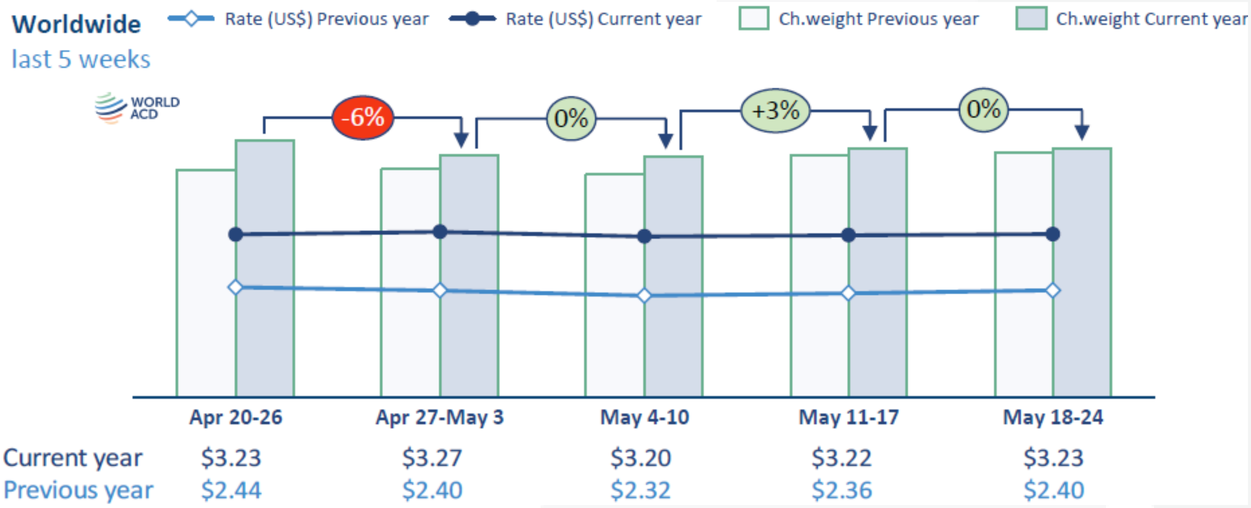
### b. Global air cargo industry

The high-frequency WorldACD data, global air cargo markets broadly stabilised in mid-May, following the earlier recovery from East Asia's "*super golden week*" holidays. Global tonnages were flat week-on-week in

[15] Linerlytica. 01/06/2026. Market Pulse 2026 Week 22.
[16] Murphy, A. 28/05/2026. Q1 EBIT drops to USD 1.35bn in 2026 (so far).

week 21 but remained around ↑**2%** above the equivalent week in 2025, supported by elevated supply-chain lead times in the US and Europe, war-related shipping disruption, and some stockpiling activity. Asia Pacific demand remained comparatively firm, with tonnages ↑**5%** higher year-on-year.

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




*Source: World ACD*

Pricing also remained elevated: full-market rates were flat at **$3.23/kg**, but ↑**35%** higher year-on-year, while spot rates rose ↑**1%** (w/w) to **$3.75/kg** and were ↑**50%** higher year-on-year. Capacity is recovering slowly, but Gulf-related constraints remain material, with MESA capacity still ↓**32%** below pre-war levels.

Lastly, FIATA has called for a formal review of IATA's proposed changes to the Direct Air Waybill framework, arguing that the amendments materially alter the allocation of responsibilities, liabilities and indemnities between airlines, freight forwarders and shippers. FIATA's concern is that the changes, scheduled for expedited implementation on **1 July 2026**, require further industry-wide assessment to ensure that they are legally clear, operationally workable, insurable, and appropriately aligned with each party's actual role and risk exposure in the air cargo chain.[17]

**ENDS** [18]

[17] FIATA. 28/05/2026. Review of Air Waybill, Maritime Chokepoints, the OPIOIDS Project & Digital Corridors in Asia-Pacific.

[18] **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.*