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Cargo Movement Update #285[1]

Date: 7 June 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)	27,096	30,869	**57,965**	26,374	30,047	**56,421**	↑3%
Air Cargo (tons)	3,827	2,592	**6,419**	3,931	2,503	**6,434**	↓0.2%

Monthly Snapshot

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

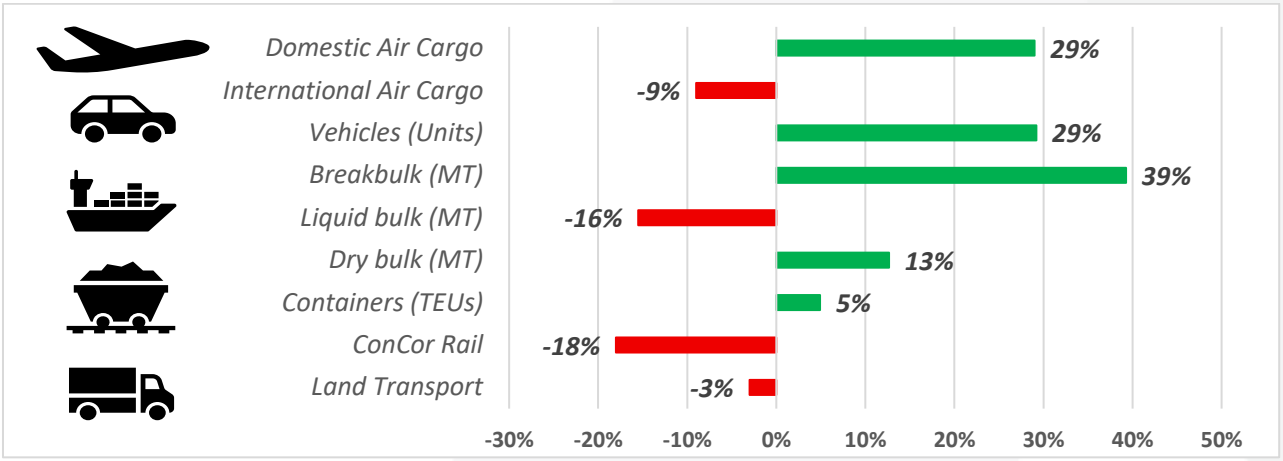
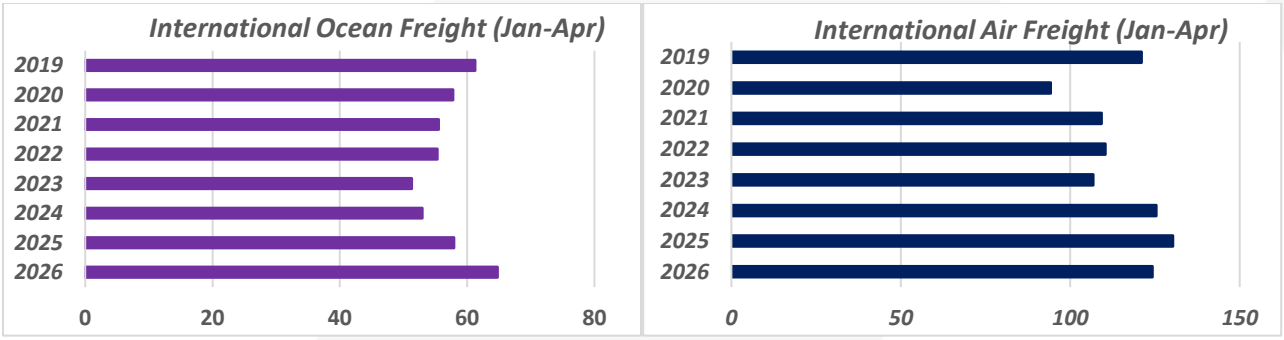


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **8,281 TEUs** was handled per day, with **7,809 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3,040** containers, up by ↑1% from last week.
- Cross-border queue: **↓0.9 hrs**; transit: **↑1.1 hrs**; SA borders: **~9.8 hrs** (**↑7%**); SADC: **~8 hrs** (**↑16%**).
- **MSC reached a record 21.5% share of global container capacity in May**, the highest ever recorded.
- Drewry's "*World Container Index*" continued its march and surged by **↑23%** (w/w) to **$3,433/40ft**.
- Global air cargo fell **↓9%** (w/w), with rates up **↑2%** (w/w) to **$3.29/kg**, leaving pricing **↑35%** versus last year.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *285th* 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 **8,281 TEUs** was handled daily, an increase from **8,060 TEUs** the previous week.

Port operations delivered a mixed performance throughout the week, as many terminals were plagued by weather disruptions, particularly in the East and Western Cape regions. Despite various challenges, both Durban and Cape Town's Multi-Purpose Terminals recorded significant increases in waterside operations, along with an estimated **↑7%** increase for DGT and an increase for New Pier. Overall, operational performance remained resilient across most terminals, supported by consistently strong equipment availability despite challenging conditions. Fuel shortages caused challenges on the Botswana rail line throughout the week, though the issue was resolved by Friday.

Global shipping conditions remain highly unsettled, with the Strait of Hormuz/Iran conflict still creating restricted, high-risk passage and wider uncertainty across Gulf-linked energy and shipping corridors. The latest CPPI results show a slight deterioration in global container-port performance, with continued regional divergence and Sub-Saharan African ports remaining structurally weaker.

Carrier capacity dynamics also continue to shift, as MSC reached a record **21.5% share of global operated container capacity**, widening the gap with **Maersk**, whose market share fell to **13.7%** amid a more constrained fleet strategy. At the same time, container freight markets have tightened sharply, with Drewry's "*World Container Index*" surging by **↑23%** to **$3,433/FEU**, driven by early peak-season demand, Red Sea diversions, tariff-related front-loading, PSS/FAK increases, and bunker-related cost pressure.

This week's international cargo flows were steady, but similar to last week's slightly subdued volumes. The daily average amounted to **~547,000 kg** inbound (**↓3%**, w/w) and **~370,000 kg** outbound (**↑4%**). Current volumes to and from ORTIA are nonetheless slightly above the commensurate volumes of June last year (**↑2%**) and also slightly above the pre-pandemic June of 2019 (**↑1%**).

IATA's April air cargo data show a partial recovery from March's disruption, with global CTKs up **↑4,0%** year-on-year, despite continued Middle East weakness and constrained capacity. The improvement was driven mainly by Asia Pacific, Africa, Europe and North America, while Gulf-linked corridors remained under pressure and elevated jet fuel costs continued to support stronger cargo yields. From the high-frequency data, we can see that global air cargo volumes softened sharply in the final week of May, mainly due to holiday-related disruptions. Still, rates continued to rise despite weaker traffic and lower capacity.

On the N4 corridor, movements decreased by about **100 trucks**, as trains from KM4 to Maputo (an average of **2 trains per day**) were stable. Truck volumes through the border post decreased slightly to **1,517 HGVs per day** (**↓6%**, w/w). Overall, queue times were stable at an average of **~3.8 hours** (**↓3%**) at the border. The average processing times were also stable at an average of **~3.5 hours** per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time decreased by almost **an hour** from last week, as transit time went in the opposite direction and increased by **an hour**. The median border crossing times at South African borders increased by **three-quarters of an hour** on average, averaging **~9.8 hrs** (**↑7%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) increased by approximately **an hour**, averaging **~8 hrs** (**↑16%**). This week, on average, the same **three** SADC borders again took more than a day to cross, namely Chirundu OSBP, Kasumbalesa (the worst affected, taking around **four and a half days** to cross from the **Zambian side**) and Katima Mulilo.

Other cross-border developments this week included **(1)** continued security and queue-related disruptions between Kasumbalesa and "Whiski", linked to the Kanyaka scanner; **(2)** the suspension of DRC scanner operations pending further stakeholder alignment; and **(3)** temporary South African route and processing disruptions on the N11, N3, and at KM7.

Finally, the latest World Bank/S&P "*Global Container Port Performance Index*" (CPPI) again underlines the importance of interpreting port rankings carefully.[6] The CPPI is a vessel-time-in-port indicator, not a comprehensive measure of whole-system logistics performance. It does not capture cargo dwell, landside evacuation, rail reliability, truck turnaround, cost, throughput, or cargo-owner outcomes. South Africa's 2025 results show both recovery and persistent weakness: Port Elizabeth ranked 314th globally, Ngqura 380th, Durban 398th, and Cape Town 400th, with all four still recording negative CPPI scores. Encouragingly, Durban, Coega/Ngqura and Port Elizabeth were among the strongest year-on-year improvers. Still, the deeper lesson is that South Africa requires a fuller, shared performance view across vessels, terminals, rail, road, dwell time, cost and reliability. SAAFF therefore reiterates the need for structured data-sharing between Transnet, industry and public-sector partners to support transparent diagnosis, better accountability and a credible national port-and-corridor performance framework.

[6] World Bank. 10/06/2026. **A global benchmark of port performance based on vessel time in port.**

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 1 to 7 June (measured in TEUs)

7-day flow reported (01/06/2026 – 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)	2,229	15,605	↑14%
Cape Town Container Terminal	2,140	14,982	↓20%
Ngqura Container Terminal	2,050	14,353	↓2%
Port Elizabeth Container Terminal	586	4,099	↓20%
Other	1,275	8,926	↑108%
Total	**8,281**	**57,965**	↑3%

Source: Calculated from TPT, 2026. Updated 07/06/2026.

An average of **~8,281 TEUs** (↑3%) was handled per day for the last week (*1 to 7 June, **Error! Reference source not found.***). Consequently, throughput was above the projected average of **~7,809 TEUs** (↑6% actual versus projected). For the coming week, a decreased average of **~7,809 TEUs** (↓6%) is predicted to be handled (*8 to 14 June*, *Table 3*).

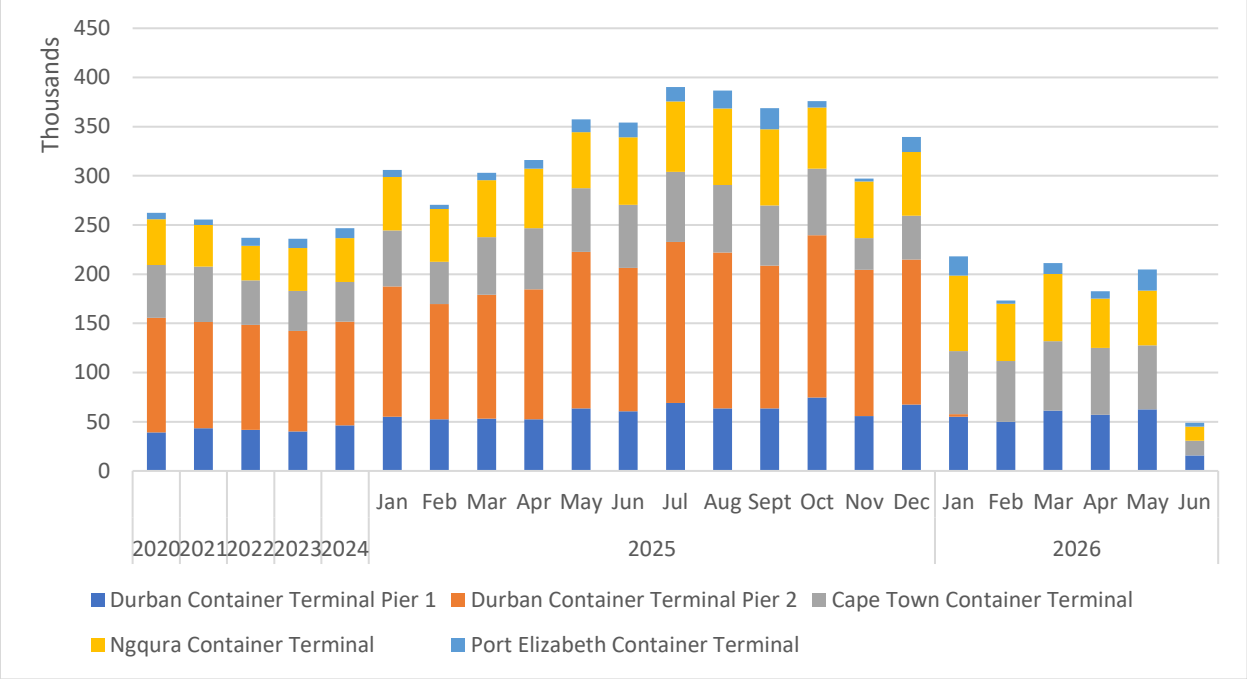
Table 3 – Container Ports – Weekly flow projected for 8 to 14 June (measured in TEUs)

7-day flow projected (08/06/2026 – 14/06/2026)			
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	↓6%
Cape Town Container Terminal	2,289	16,025	↑7%
Ngqura Container Terminal	2,163	15,142	↑5%
Port Elizabeth Container Terminal	426	2,982	↓27%
Other	826	5,784	↓35%
Total	**7,809**	**54,666**	↓6%

Source: Calculated from TPT, 2026. Updated 07/06/2026.

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 07/06/2026.

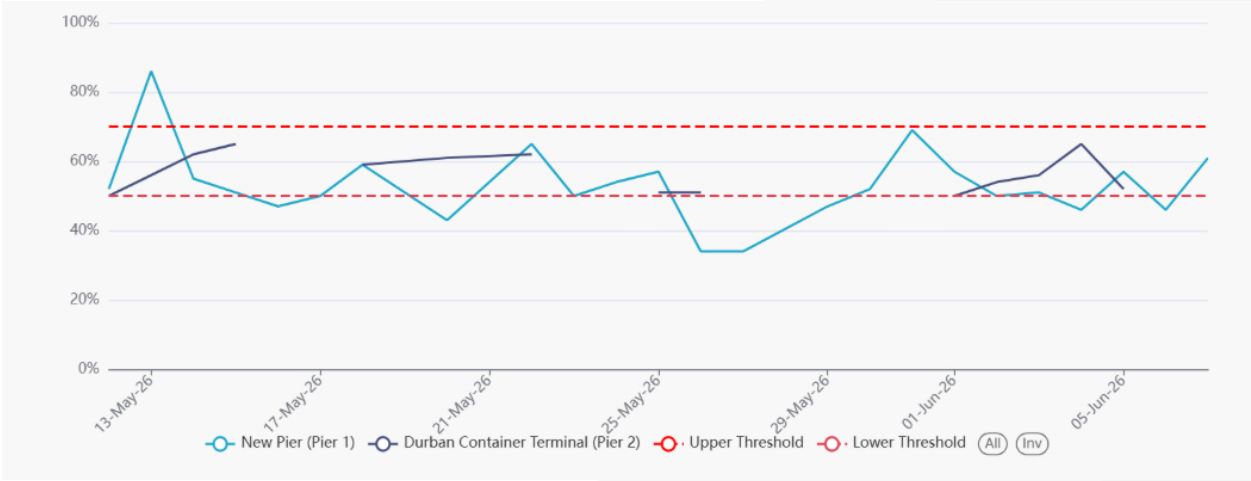
The following table shows the average vessel time (in days) at anchorage and the average time at berth (in days) at our respective ports and terminals as of Wednesday:

Table 4 – Vessel Dwell Time

Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.2	2.4
Cape Town	FPT	0.0	3.2
Cape Town	MPT	0.0	2.3
Durban	Pier 2	1.1	3
Durban	Pier 1	0.7	2.1
East London	MPT	1.9	2.7
Ngqura	NCT	1.5	2.3
Port Elizabeth	PECT	0.9	1.5

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

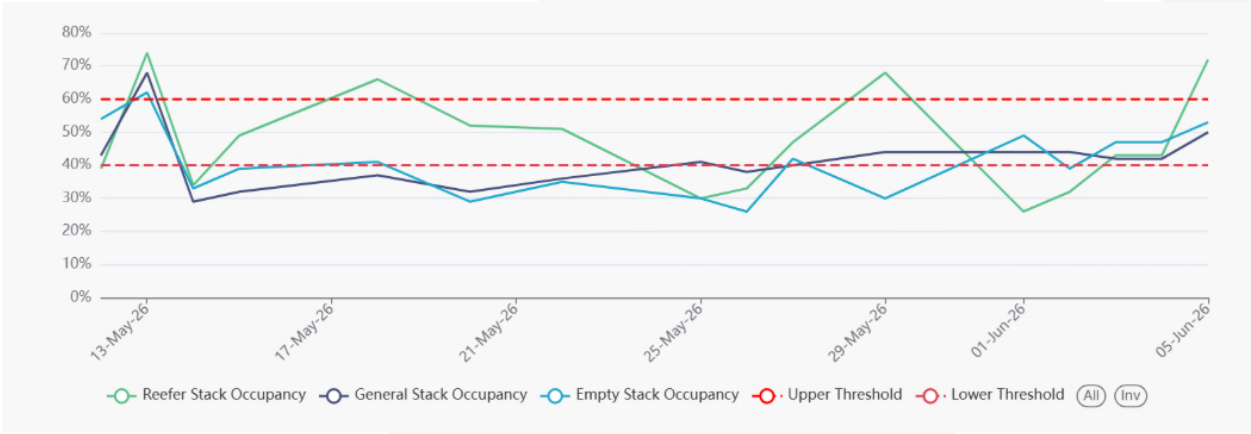
Figure 4 – Stack occupancy in Durban, general-purpose containers (11 May to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 07/06/2026.

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 (11 May to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 07/06/2026.

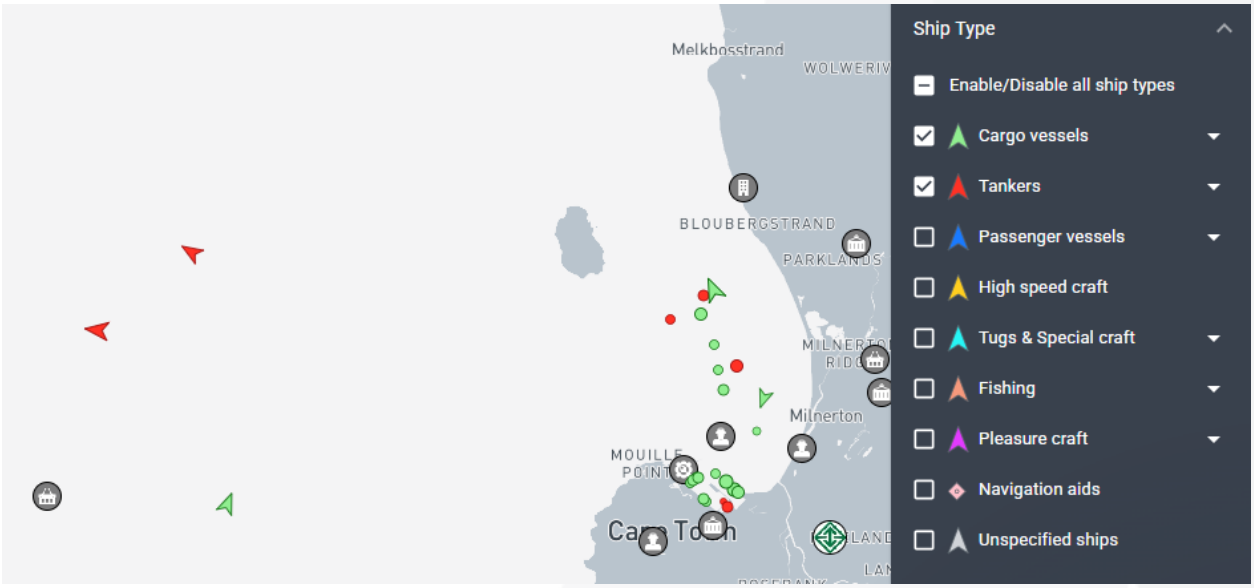
b. Summary of port operations

i. Cape Town

The Cape Town Container Terminal experienced a decline in waterside operations compared to the previous week, with poor weather conditions persisting throughout the week, causing disruptions in operations. Vessel movements were steady, considering the weather conditions, waiting an average of 21 hours at anchorage, and spending around 73 hours at berth. Equipment availability remained steady throughout the week, with an average of eight out of 9 cranes and 29 out of 32 RTGs available.

Cape Town Multi-Purpose Terminal reported a significant increase in waterside activities, in spite of significant weather delays. Vessels spent an average of 28 hours at anchorage and 81 hours at berth. Equipment availability remained consistent, with two out of three cranes and three out of five straddle carriers available on average throughout the week.

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



Source: Marine Traffic. Updated 07/06/2026 at 14:00.

ii. Durban

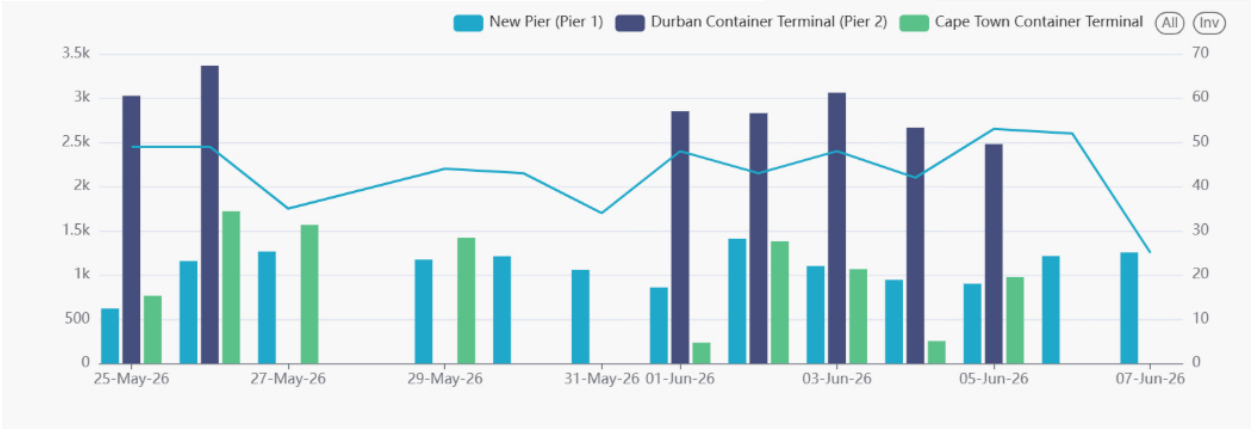
Pier 1 reported an increase in waterside volumes along with an increase in landside volumes in spite of continued challenges reported on the truck booking system. High stack occupancy challenges were reported towards the end of the week, likely causing a slight increase in truck turnaround times. Vessel activities were slow, with vessels waiting an average of 37 hours at anchorage and 38 hours at berth, with a somewhat lower than desirable berth occupancy. Equipment availability remained consistent, with an average of six out of seven cranes and 18 out of 25 RTGs available throughout the week. The **TTT** for the week averaged **~44 minutes** (**↑16%**, w/w), and the average **staging time** was **~22 minutes** (**↓8%**).

Durban Gateway Terminal continued a strong performance on waterside, with volumes up by **↑7%** to an estimated daily volume of **3,873** containers (from the previous week's **3,610**). Vessels spent an average of 32 hours at anchorage and 83 hours at berth. Landside volumes, on the other hand, are down by approximately **↓7%** to **2,776** from last week's **2,980**, which is in line with some challenges expressed by truckers, particularly in relation to truck turnaround times.

Durban Multi-Purpose Terminal recorded a significant increase in waterside volumes of nearly 50% compared to the previous week. Rail volumes remained low, but vessels generally berthed on arrival, with no notable anchorage delays reported. Vessels spent an average of 90 hours at berth, while equipment availability averaged three out of four cranes throughout the week.

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.

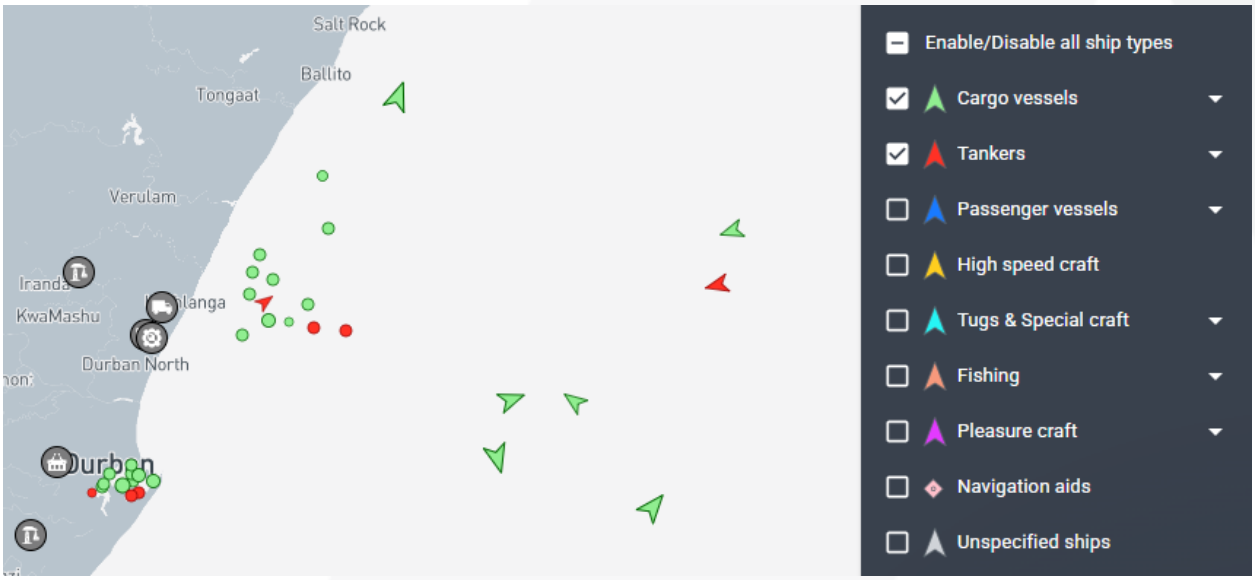
Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 07/06/2026.

The queue of container vessels waiting outside Durban **was again stable** this week. On Wednesday morning (10 June), **two** container vessels were waiting outside at anchorage for Durban, **one** for Pier 1 and **one** for DGT. The queue of dry (**seven**), liquid (**three**), and breakbulk (**three**) **was stable** from last week:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 07/06/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal reported steady waterside volumes (down by only 2%) in spite of significant weather delays experienced towards the end of the week. Vessels spent an average of 33 hours at anchorage and 55 hours at berth. Equipment availability remained strong, averaging seven out of eight cranes and 23 out of 30 RTGs available throughout the week.

Port Elizabeth Container Terminal experienced serious weather delays towards the end of the week, leading to a notable decrease in waterside movements and vessel delays, with vessels spending an average of 46 hours at anchorage and 35 hours at berth. Equipment availability remained stable with all three cranes in

operation (two STS and one MHC), and 10 out of 11 straddle carriers available on average throughout the week.

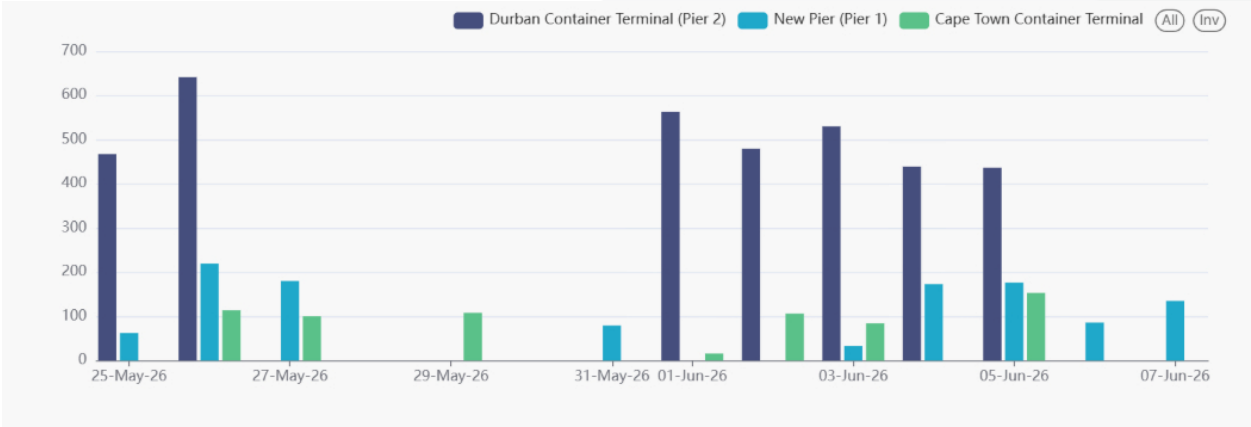
iv. Richards Bay

The daily average coal throughput for the week decreased considerably and averaged roughly **130,000 tons** (**↓37%**, w/w) a day. An average of **18 trains** was serviced on the landside (down from last week's **25**), and **below the target** (**22** trains).

v. Transnet Freight Rail (TFR)

In the last week (*1 to 7 June*), rail cargo on the ConCor line out of Durban was reported at **3,050** containers, up by **↑1%** from the previous week's **3,014** containers. Fuel shortages caused challenges on the Botswana rail line throughout the week, though the issue was resolved by Friday.

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



Source: Calculated using data from Transnet, 2025. Updated 07/06/2026.

2. Air Cargo Update

a. International air cargo

As mentioned last week, the following table shows the inbound and outbound air cargo flows to and from ORTIA for last week (*1 to 7 June*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *June 2025* averaged **~894,958 kg**.

Table 5 – International inbound and outbound cargo from OR Tambo

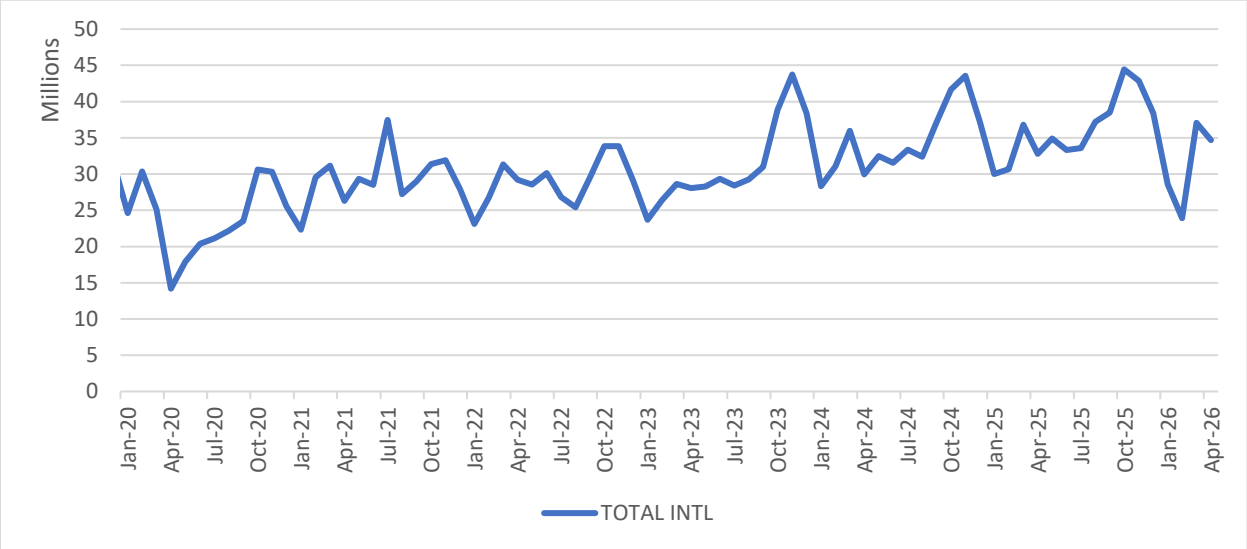
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**546,740**	**3,827,178**	**↓3%**
Volume outbound	**370,280**	**2,591,957**	**↑4%**
Total	**917,019**	**6,419,135**	**↓0.2%**

Courtesy of ACOC. Updated: 07/06/2026.

This week's international cargo flows were steady, but similar to last week's slightly subdued volumes. The daily average amounted to **~547,000 kg** inbound (**↓3%**, w/w) and **~370,000 kg** outbound (**↑4%**). Current volumes to and from ORTIA are nonetheless slightly above the commensurate volumes of June last year (**↑2%**) and also slightly above the pre-pandemic June of 2019 (**↑1%**).

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 (as of Wednesday, 10 June) per airport indicate:

- ORTIA: **9.5 days** (target: 5 days)
- CTIA: **4 days** (target: 4 days)
- Durban: **14 days** (target: 5 days)

3. Road and Regional Update

a. Lebombo border post update

In the last week (*1 to 7 June)*, movements decreased by about **100 trucks**, as trains from KM4 to Maputo (an average of **2 trains per day**) were stable.

- Truck volumes through the border post decreased slightly to **1,517 HGVs per day** (**↓6%**, w/w).
- Overall, queue times were stable at an average of **~3.8 hours** (**↓3%**) at the border.
- The average processing times were also stable at an average of **~3.5 hours** per crossing.

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

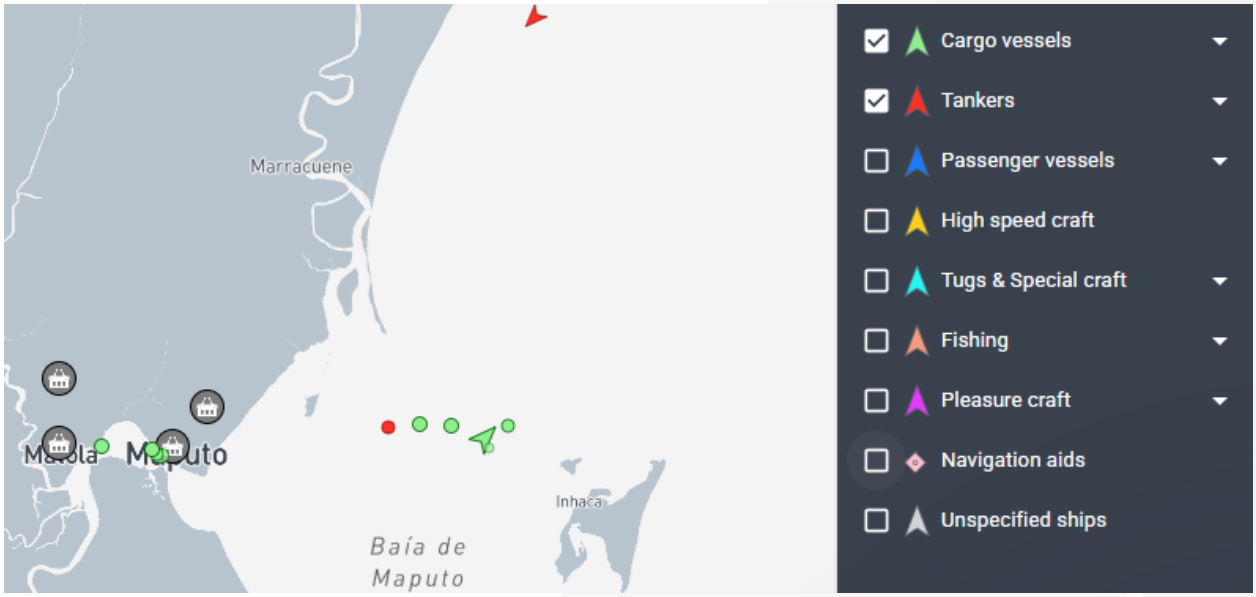
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,517	1,463	1,165	202	41	64	32	234
% (w/w)	**-6%**	**-6%**	**-5%**	**-8%**	**-2%**	**-29%**	**-43%**	**-5%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 07/06/2026.

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 07/06/2026 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 almost **an hour** from last week, as transit time went in the opposite direction and increased by **an hour**.
- The median border crossing times at South African borders increased by **three-quarters of an hour** on average, averaging **~9.8 hrs** (**↑7%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by approximately **an hour**, averaging **~8 hrs** (**↑16%**).

1. **DRC/Zambia: Kasumbalesa– "Whiski" queue and scanner disruption:**
    a. Security risks escalated in the queue, with reports of drivers being robbed at gunpoint, demands for "protection money", and further incidents of theft and truck break-ins.
    b. The queue remains linked to operational issues around the Kanyaka scanner, including concerns over procedures, speed requirements, and suspected mismanagement.
    c. The DRC Government issued a notice suspending scanner operations until stakeholder views are harmonised, with transporters later confirming the suspension.
2. **South Africa: N11 abnormal-load restriction:**
    a. Mpumalanga Province confirmed that abnormal vehicles wider than 3 metres are prohibited on the N11 between Hendrina Power Station and the N4 interchange.
    b. The restriction is expected to remain in place for approximately 18 months due to road construction.
3. **South Africa: N3 and KM7 operational disruptions:**
    a. The N3 between Armitage Road and Cedara was temporarily closed from Saturday evening to early Sunday morning.
    b. At KM7, BMA movement-control system issues were resolved, and passport processing resumed, before operations were again temporarily suspended after a truck damaged guardrails and a power socket near the mobile processing unit.

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

Table 7 – 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	544	21.2	4.3	21.1	16,320	3,808
Beitbridge	Zimbabwe-SA	514	4.4	1.2	4.2	15,420	3,598
Groblersbrug	SA-Botswana	223	12.1	1.5	12.1	6,690	1,561
Martin's Drift	Botswana-SA	148	2.1	0.2	2.1	4,440	1,036
Kopfontein	SA-Botswana	198	7.8	2.3	7.5	5,940	1,386
Tlokweng	Botswana-SA	52	0.8	0.2	0.5	1,560	364
Vioolsdrift	SA-Namibia	30	5.5	1.6	5.3	900	210
Noordoewer	Namibia-SA	20	2.0	0.4	2.0	600	140
Nakop	SA-Namibia	30	5.1	0.6	5.0	900	210
Ariamsvlei	Namibia-SA	20	1.4	0.4	1.2	600	140
Skilpadshek	SA-Botswana	290	20.7	4.2	20.4	8,700	2,030
Pioneer Gate	Botswana-SA	76	2.5	1.0	2.3	2,280	532
Ramatlabama	SA-Botswana	167	3.3	0.3	3.2	5,010	1,169
Ramatlabama	Botswana-SA	74	0.4	0.1	0.3	2,220	518
Lebombo	SA-Mozambique	1,555	3.8	1.1	3.5	46,650	10,885
Ressano Garcia	Mozambique-SA	1,432	2.3	0.3	2.2	42,960	10,024
Sum/Average		**5,373**	**6.0**	**1.2**	**5.8**	**161,190**	**37,611**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 31/05/2026.

Table 8 – Delays summary – Corridor perspective

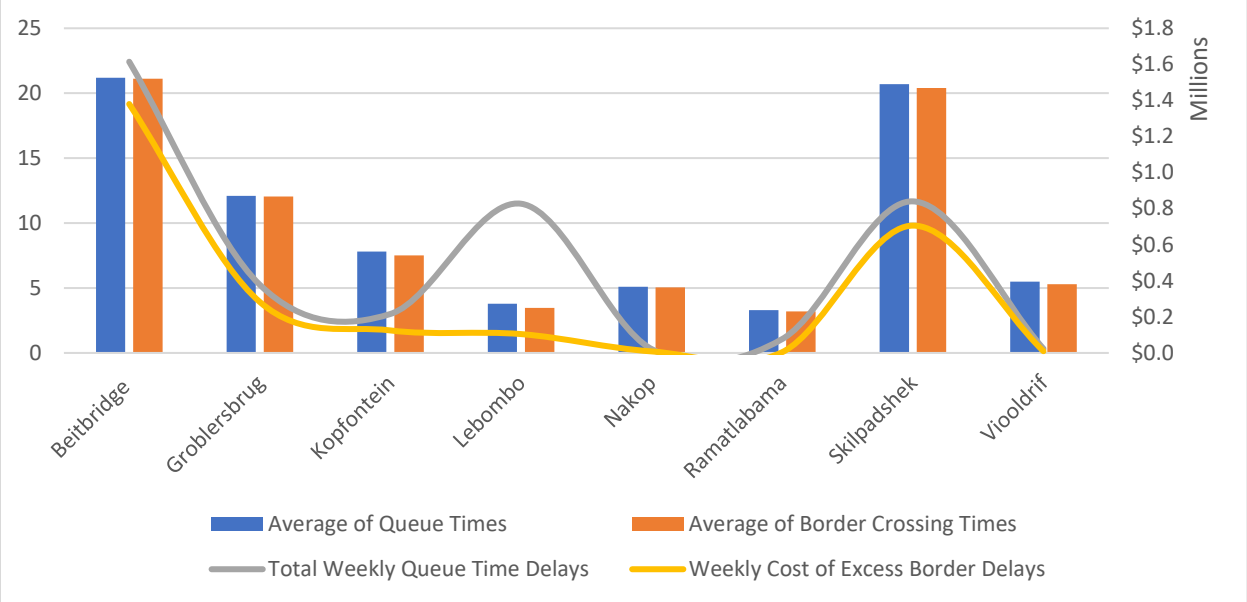
Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	9.6	2.5	9.3	9,600	2,240
Central Corridor	798	5.2	0.6	5.4	23,940	5,586
Dar Es Salaam Corridor	1,819	12.0	7.6	22.9	54,570	12,733
Maputo Corridor	2,987	3.1	0.7	2.8	89,610	20,909
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,554	11.9	4.1	15.9	106,620	24,878
Northern Corridor	2,817	0.3	0.1	0.2	92,520	21,588
WBNLD Corridor	887	5.0	1.1	4.8	26,610	6,209
Trans Cunene Corridor	100	3.5	0.7	3.4	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	23.3	4.7	23.1	3,480	812
Sum/Average	**13,625**	**6.3**	**2.1**	**8.2**	**416,760**	**97,244**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 31/05/2026.

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.

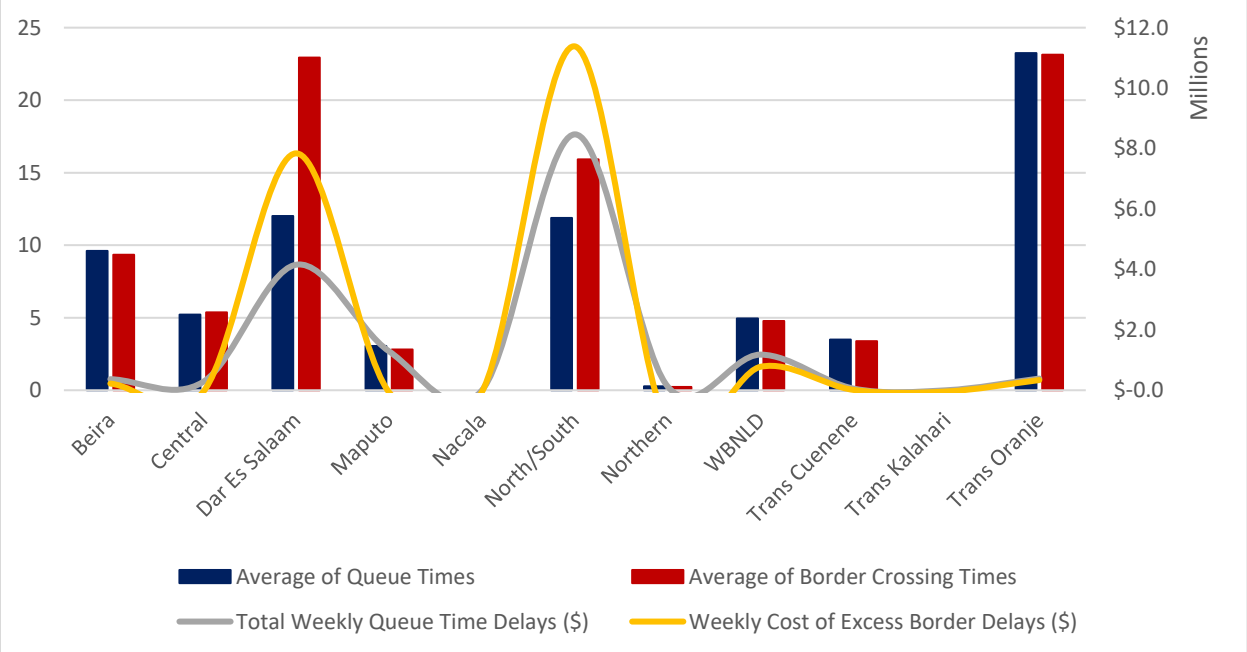
Figure 12 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 31/05/2026.

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 31/05/2026.

In summary, cross-border queue time averaged **~6.3 hours** (down by **~0.9 hours** from the previous week's **~7.2 hours**), indirectly costing the transport industry an estimated **$16.3 million** (**R265 million**). Furthermore, the week's average cross-border transit times hovered around **~8.2 hours** (up by **~1.1 hours** from the **~7.1 hours** recorded in the previous report), at an indirect cost to the transport industry of **$19.2 million** (**R311 million**). The total indirect cost for the week amounts to an estimated **~$35.5 million** (**R575 million**, down by **↓2.6%** from the **~R591million** 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 reports on the Iran conflict, and related logistics bottlenecks in and around the Strait of Hormuz, indicate the following:

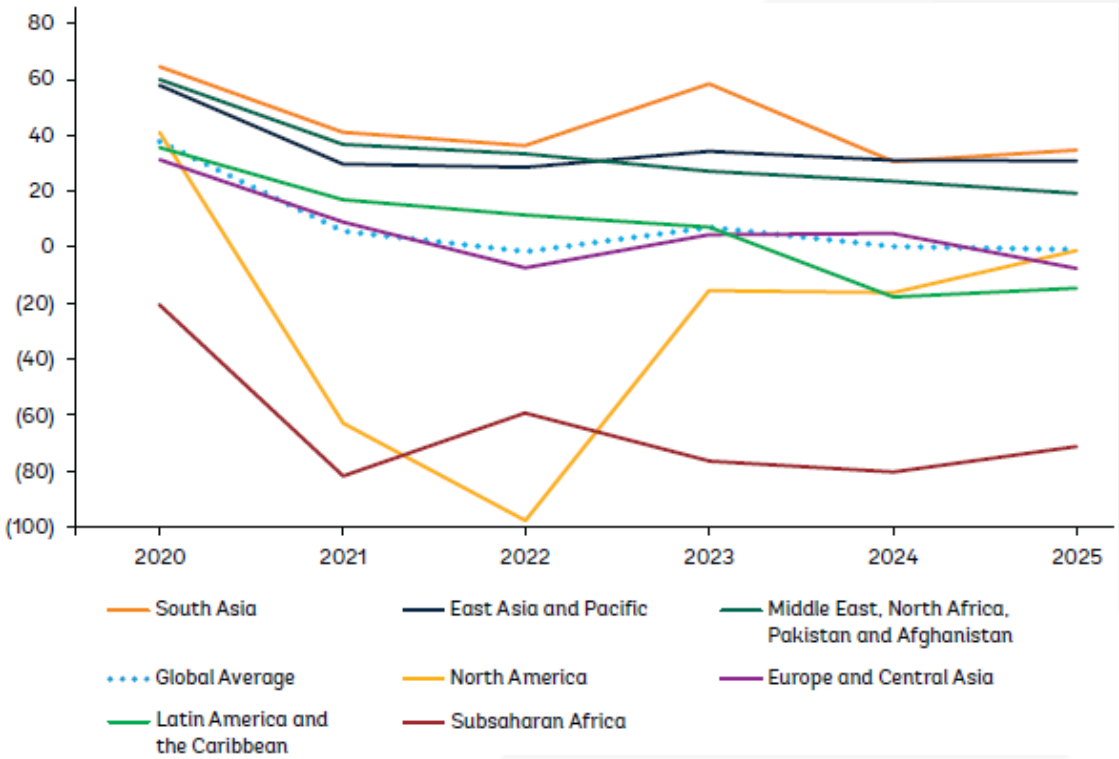
- **The Strait of Hormuz remains severely constrained**, with Iran declaring closure after renewed US strikes, while the US maintains that some commercial traffic is still moving. The practical status is therefore not full normalisation, but restricted, high-risk passage.[10]
- **Energy flows remain the primary logistics exposure**, as Hormuz is central to Gulf crude, LNG and LPG movements. Oil prices have risen again on the back of renewed escalation, reflecting market concern over supply reliability and transit risk.[11]
- **Shipping operations are increasingly distorted**, with vessels delayed, stranded, rerouted, or moving under heightened security and insurance constraints. Reports indicate thousands of seafarers and vessels remain caught inside the Gulf system, creating operational and humanitarian pressure.
- **The disruption risk is spreading across the wider Middle East corridor**, with renewed Houthi threats in the Red Sea reducing confidence in alternative routing. This raises the likelihood of higher freight costs, schedule instability, and further Cape of Good Hope diversions.[12]

ii. World Bank CPPI 2025

The World Bank and S&P Global's latest "*Container Port Performance Index*" (CPPI) provides a comparable assessment of container-port performance based on observed vessel time in port, adjusted for ship size and call size. The 2025 index shows a slight deterioration in the global average relative to 2024, reflecting continued supply-chain disruption, vessel bunching and regional divergence. Fuzhou in China ranked first globally, followed by Dalian, Salalah, Mawan and Chiwan. Performance differences remain pronounced across regions and income groups: upper-middle-income and high-income economies generally record shorter vessel turnaround times, supported by stronger infrastructure, crane intensity, digital systems and coordination, while Sub-Saharan African ports continue to record weaker average outcomes, often linked to constrained investment, import-dominated flows and limited inter-port competition.

[10] Reuters. 11/06/2026. Iran announces closure of Strait of Hormuz after US attacks.
[11] Liu, S. 11/06/2026. Oil rises more than $1 as escalation in US-Iran strikes unnerve traders.
[12] Reuters. 08/06/2026. Explainer: Why the Iran-aligned Houthis threatening Red Sea shipping could mean more for the oil market this time.

Figure 14 – CPPI averages by World Bank region, 2020 to 2025



Source: World Bank calculations, based on data provided by S&P Global Market Intelligence

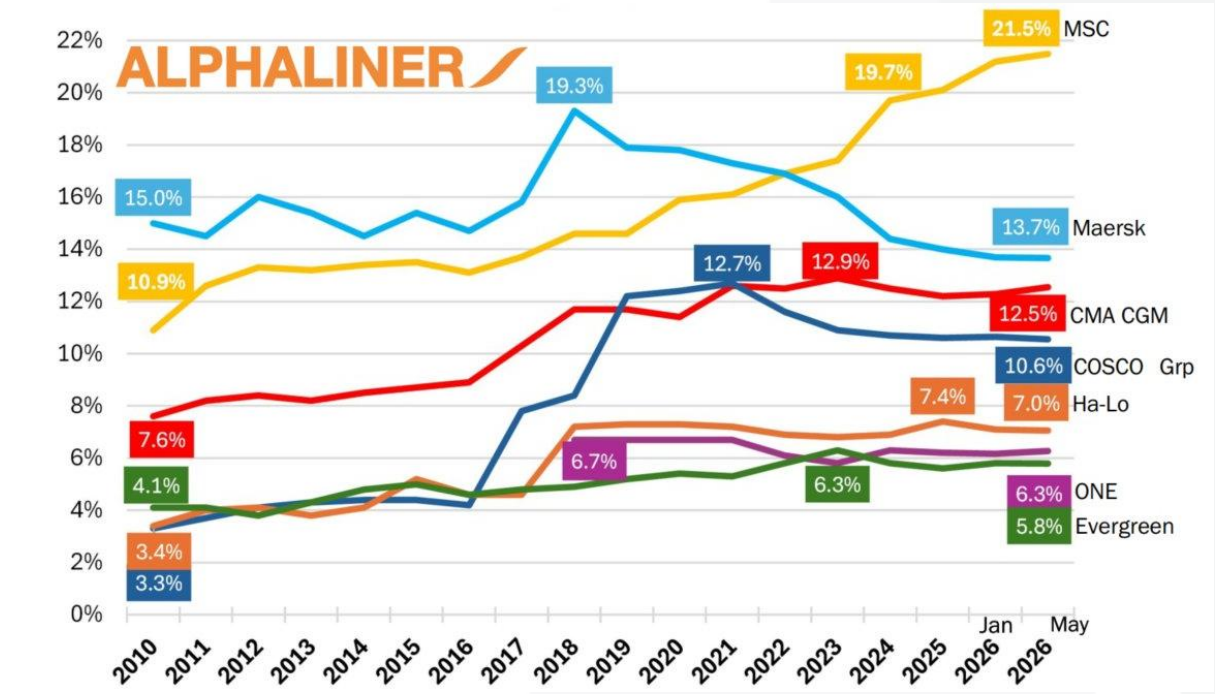
The CPPI methodology incorporates call size, moves, gross crane hours and related productivity concepts. Still, the **public report does not provide a directly comparable port-level Container Moves Performed per Gross Crane Hour across Various Ship Sizes figure**. This is precisely why complementary operational data from Transnet remains necessary to assess actual terminal productivity alongside vessel-time performance.

From the 2024 report (two versions ago), the average moves per gross container hour for all ships is **23.5 moves per hour**.

iii. Carrier capacity

Alphaliner reports that **MSC reached a record 21.5% share of global container capacity in May**, the highest ever recorded by any carrier, after sustained fleet expansion from 2020 onwards and an effective doubling of its market share since 2010. By contrast, **Maersk fell to 13.7%**, its lowest share in two decades, reflecting its strategic decision to cap fleet size around **4.1–4.3 million TEU** while prioritising fleet renewal, decarbonisation, and integrated logistics. The result is a widening structural gap between the two former 2M partners, with MSC consolidating scale leadership. At the same time, Maersk accepts declining slot share as part of a different operating model.

Figure 15 – Market share by operated capacity (carriers with >5% of the market share)

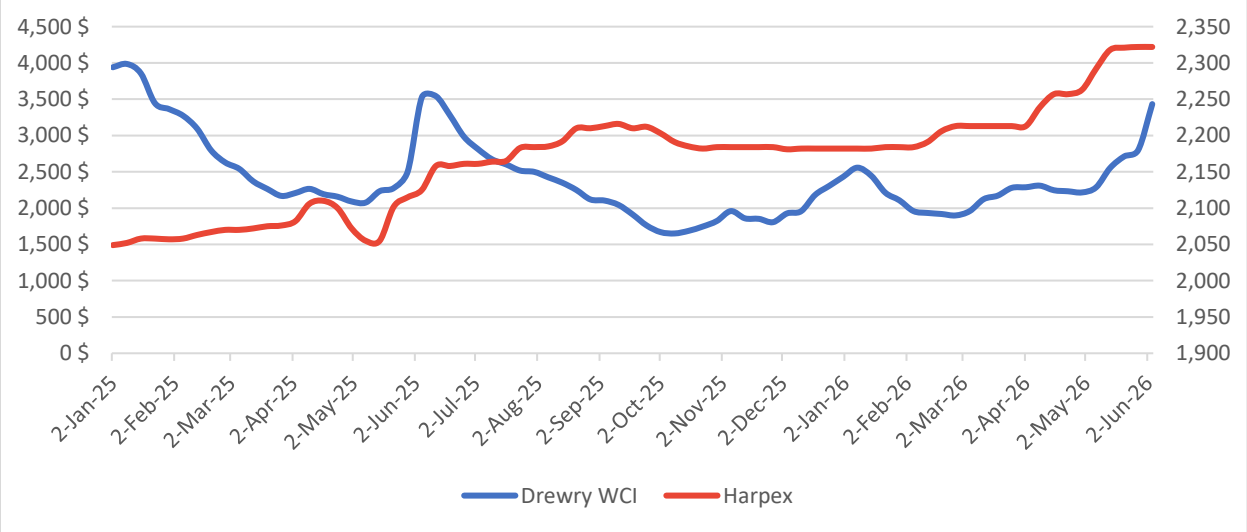


Source: Alphaliner

iv. Container freight rates

As predicted two weeks ago, Drewry's "*World Container Index*" continued its march and surged by **↑23%** to **$3,433 per 40ft container**. The surge has extended the upward streak as an earlier-than-usual peak season lifted demand across the Transpacific and Asia–Europe trades. The sharpest increases were on **Shanghai–Los Angeles (↑31% to $4,565/40ft)**, **Shanghai–Rotterdam (↑25% to $3,579/40ft)**, **Shanghai–New York (↑20% to $5,505/40ft)** and **Shanghai–Genoa (↑20% to $5,089/40ft)**, with Drewry expecting further upward pressure in coming weeks due to PSS/FAK increases, front-loaded demand, Red Sea diversions, tariff-related booking acceleration, and bunker-related cost pressure.

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

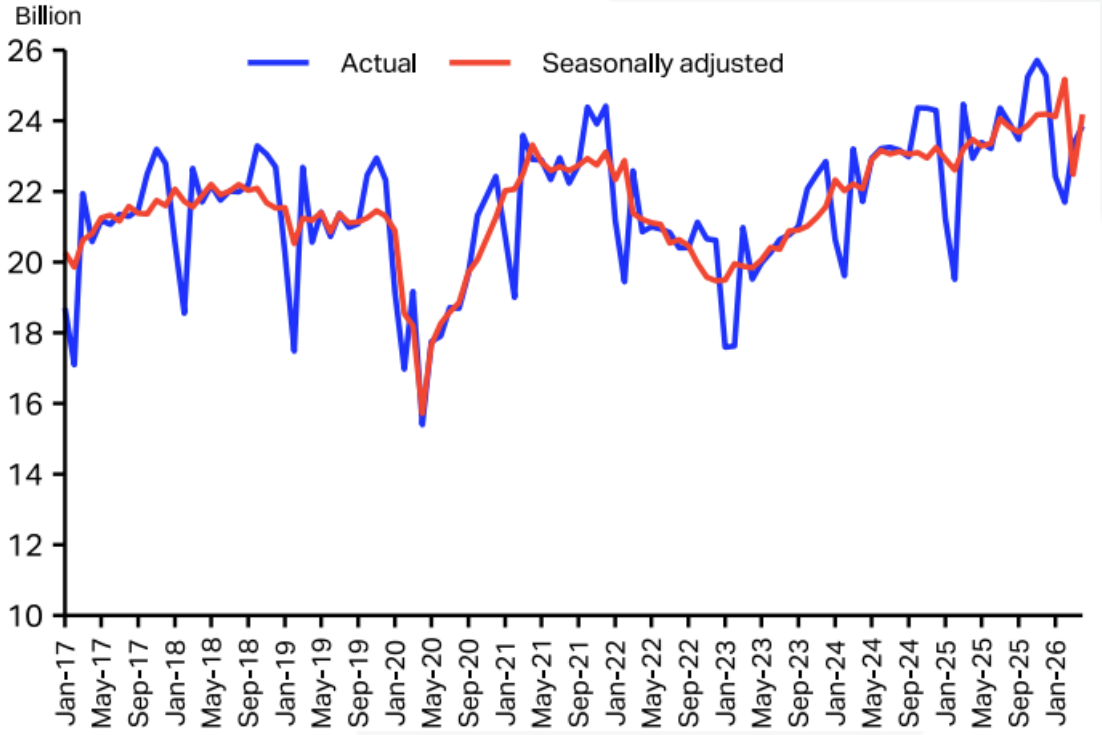


Source: Calculated from Drewry & Harpex

b. Global air cargo industry

For April, IATA's latest "*Air Cargo Market Analysis*" indicates a partial recovery from March's disruption, with global air cargo demand (CTK) increasing by **↑4,0%** (y/y) and international traffic also up **↑4,0%**. Capacity (ACTK), however, remained constrained at **↓0,4%** globally and **↓0,9%** internationally, lifting the global cargo load factor by **↑1,9%** to **46,0%**. The recovery was led by Asia Pacific, with CTKs up **↑10,5%**, followed by Africa at **↑7,7%**, Europe at **↑6,0%** and North America at **↑5,0%** (all y/y). The Middle East remained the clear underperformer, with CTKs down **↓18,2%** and ACTKs down **↓22,9%**, reflecting continued disruption across Gulf-linked corridors. Jet fuel prices remained highly elevated, while air cargo yields increased by **↑32,2%** year-on-year.

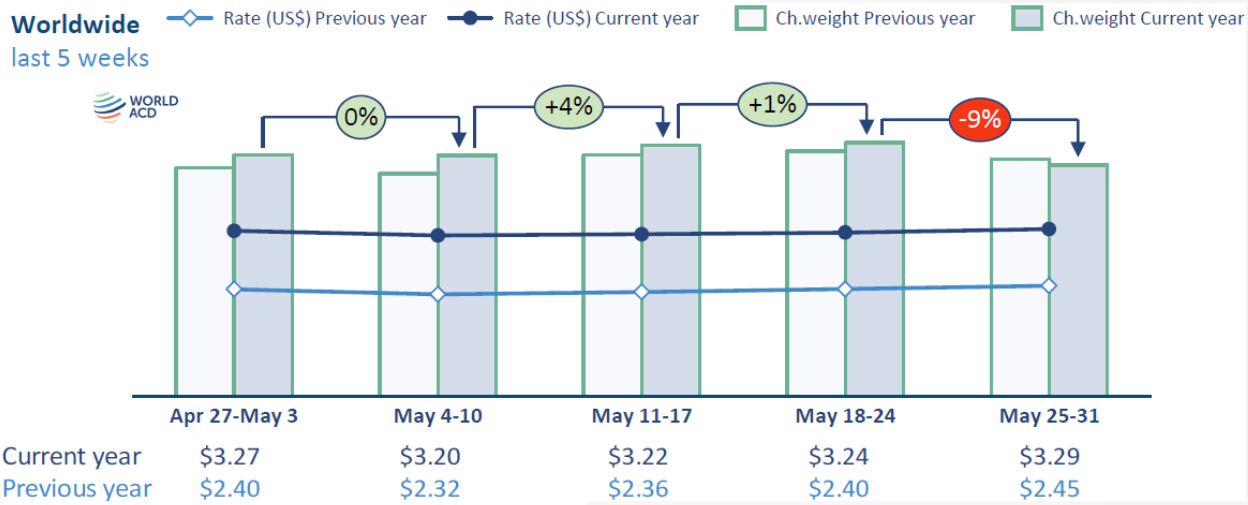
Figure 17 – Industry CTK (billions)



Source: IATA

The high-frequency WorldACD data, global air cargo demand weakened in Week 22, with chargeable weight falling by **↓9%** (w/w), largely due to Pentecost, US Memorial Day and Eid al-Adha disruptions. Volumes declined from all origin regions, with the sharpest falls from the Middle East & South Asia (**↓21%**) and Africa (**↓20%**).

Figure 18 – Chargeable weight and rates (past five weeks)



Source: World ACD

Despite weaker traffic, global average rates rose by **↑2%** week-on-week to **$3.29/kg**, leaving pricing **↑35%** above the same period last year. Capacity contracted by **↓1%**, mainly due to a **↓6%** decline from the Middle East & South Asia. The late-May slowdown reduced May's full-month growth to 3% year-on-year, although year-to-date global tonnage remains 4% above 2025 levels, supported mainly by Asia Pacific growth.

ENDS [13]

[13] **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.*