

Cargo Movement Update #287¹

Date: 21 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)	30,674	34,947	65,621	28,632	32,620	61,252	↑7%
Air Cargo (tons)	4,681	2,710	7,391	4,458	2,513	6,971	↑6%

Monthly Snapshot

Figure 1 – Cyclical⁴ monthly cargo volume, year on year (most metrics: May '25 vs May '26, % growth)

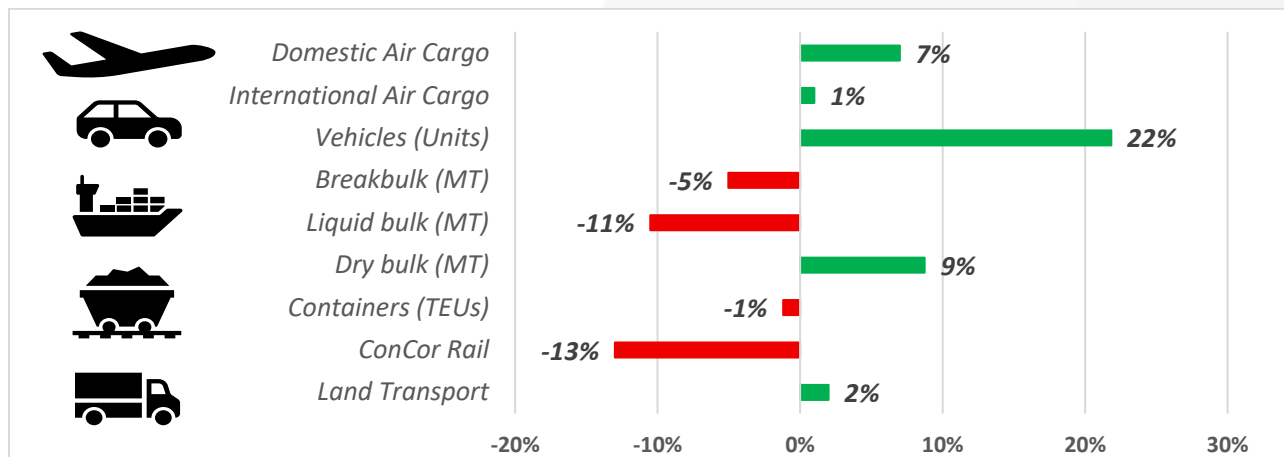
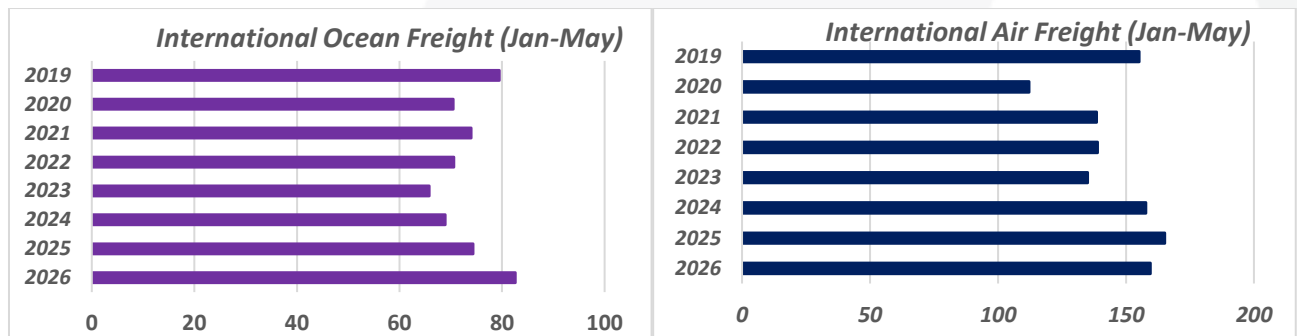


Figure 2 – Year-to-date flows 2019-2026⁵: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **9,374 TEUs** was handled per day, with **7,853 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2,610** containers, down by **↓17%** from last week.
- Cross-border queue: **↑0.7 hrs**; transit: **↑0.9 hrs**; SA borders: **~7.8 hrs (↓4%)**; SADC: **~8.2 hrs (↑15%)**.
- Since the peace deal was signed, nine container ships, **26 dry bulk** and **31 tankers** have transited the Strait.
- Carriers are gearing for another major rate hike in July with increases as high as **\$5,000/FEU on certain routes**.
- Worldwide air cargo was up by **↑1% (w/w)**, while global capacity and rates (**\$3.23/kg**) remained stable.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 287th 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: May vs. May.

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 **9,374 TEUs** was handled daily, an increase from **8,750 TEUs** the previous week.

Port performance was mixed this week, with a notable improvement in operations in CTCT despite poor weather conditions. Durban's Pier 1 Terminal and PECT reported an increase in volumes, while both Cape Town and Durban's multi-purpose terminals reported a significant drop in waterside volumes. DGT and NCT had relatively stable performance, despite some challenges faced in NCT with container damage. Weather-related delays continued to affect operations in the Western Cape, while elevated anchorage times in the Eastern Cape suggest that vessel backlogs remain a challenge despite improved terminal throughput. Overall, equipment availability remained strong across most terminals, supporting operational resilience despite localised disruptions. Lastly, a fire incident at D Berth within Durban's Point Multi-Purpose Terminal temporarily affected operations on the evening of 22 June, with Transnet Port Terminals confirming that the affected section resumed operations approximately an hour later.

Following the Iran-US peace deal on 17 June, only nine container ships had departed the Persian Gulf, including six Iranian vessels, leaving **more than 50 container ships still stranded** amid uncertainty over transit terms through the Strait of Hormuz. Wider shipping movements also remained disrupted, with dry bulk and tanker transits continuing but seafarer evacuation concerns still evident.

Sea-Intelligence cautioned that conventional vessel-delay metrics may understate true liner-network disruption, as carriers increasingly build structural buffers into published schedules. This produces more early arrivals and reduces the measured average delay, even while underlying volatility persists.

The supply-side outlook is also shifting: Alphaliner reports that the global containership orderbook is nearing **13 million TEU**, equivalent to **38.3% of the cellular fleet**, with contracting since mid-2025 moving decisively toward smaller and mid-sized vessels. Container freight markets remained firm, with mid-June rate increases largely holding and further July hikes expected. Cargo demand is now outpacing available vessel slots, while port congestion continues to absorb effective capacity, with anchorage capacity rising to **3.4 million TEU**.

This week's international cargo flows increased slightly for both inbound and outbound cargoes. The daily average amounted to **~667,000 kg inbound (↑5%, w/w)** and **~387,000 kg outbound (↑8%)**. Current volumes to and from ORTIA remain significantly above the commensurate volumes of June last year (**↑18%**) and also above the pre-pandemic June of 2019 (**↑16%**).

The global air cargo market remained broadly stable in week 24, with worldwide tonnage up **↑1% (w/w)**, capacity unchanged, and average pricing flat at **\$3.23/kg** despite renewed Middle East hostilities. Year-on-year conditions remain firmer, with global chargeable weight up **↑10%** and rates around one-third higher than in 2025, led by continued growth from the Middle East & South Asia, Africa and Asia Pacific.

On the N4 corridor, movements increased by exactly **100 trucks**, as trains from KM4 to Maputo **were stable (an average of 2 trains per day)**. Truck volumes through the border post increased to **1,545 HGVs per day (↑6%, w/w)**. Overall, queue times were stable at an average of **~4.7 hours** at the border. The average processing times were also stable at an average of **~4.4 hours** per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time increased by around **three-quarters of an hour** from last week, as transit time went in the opposite direction and increased by nearly **an hour**. The median border crossing times at South African borders decreased by around **half an hour** on average, averaging **~7.8 hrs (↓4%)** for the week. In contrast, the greater SADC region

(excluding South African-controlled) increased by slightly more than **an hour**, averaging **~8.2 hrs (↑15%)**. This week, on average, **three** SADC borders again took more than a day to cross, namely Chirundu OSBP and Kasumbalesa (the worst affected, taking around **six days** to cross from the **Zambian side**) and Katima Mulilo.

Cross-border developments this week included **(1)** changes by the Namibia Revenue Agency to ASYCUDA World, requiring incorrect importer or exporter details on SAD500 declarations to be cancelled and replaced rather than amended by Voucher of Correction; **(2)** renewed transporter concerns over deteriorating port-access infrastructure at Richards Bay, with calls for rehabilitation and clearer accountability on truck access fees; **(3)** reported immigration-compliance risks in Zambia, with drivers urged to verify that passports are correctly stamped before proceeding; **(4)** increasing queues at Kasumbalesa, linked to slower processing by newer officials and ongoing border-facility upgrades; and **(5)** the extension of Zimbabwean Exemption Permits to 28 May 2027.

The tentative start of vessel evacuations from the Strait of Hormuz this week, following the Iran-US peace deal, again underlines both the value and the limits of logistics visibility in periods of disruption. Even where tracking platforms provide near-real-time insight, the operating picture remains imperfect. In the current conflict environment, reports of GPS jamming, AIS spoofing and vessels “going dark” mean that vessel movements must be interpreted with caution and with due regard to the limitations of AIS data. The broader lesson for South Africa’s logistics system is clear. True logistics monitoring cannot be achieved through fragmented, bilateral or institution-specific datasets. It requires a step change in how public entities, private operators, cargo owners, intermediaries and service providers share data, integrate systems and collaborate around a common operational picture. Too often, the line of sight across the domestic logistics chain remains partial, delayed or contested. Until industry-wide data sharing becomes routine, structured and trusted, South Africa will continue to manage logistics performance reactively rather than systemically. Data integration is therefore not a technical add-on; it is a core requirement for resilience, accountability and operational reform.

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1. Ports Update

This section provides an overview of the flow of containerised cargo through our commercial ports.

a. Container flow overview

The following tables indicate the container flows reported for the last seven days. The reporting period runs from Monday to Sunday:

Table 2 – Container Ports – Weekly flow reported for 15 to 21 June (measured in TEUs)

7-day flow reported (15/06/2026 – 21/06/2026)			
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)	2,471	17,299	↑13%
Cape Town Container Terminal	2,648	18,534	↑25%
Ngqura Container Terminal	2,757	19,301	↓1%
Port Elizabeth Container Terminal	1,151	8,054	↑52%
Other	348	2,433	↓62%
Total	9,374	65,621	↑7%

Source: Calculated from TPT, 2026. Updated 21/06/2026.

An average of ~9,374 TEUs (↑7%) was handled per day for the last week (15 to 21 June, **Error! Reference source not found.**). Consequently, throughput was above the projected average of ~7,809 TEUs (↑20% actual versus projected). For the coming week, a decreased average of ~7,853 TEUs (↓16%) is predicted to be handled (22 to 28 June, **Error! Reference source not found.**).

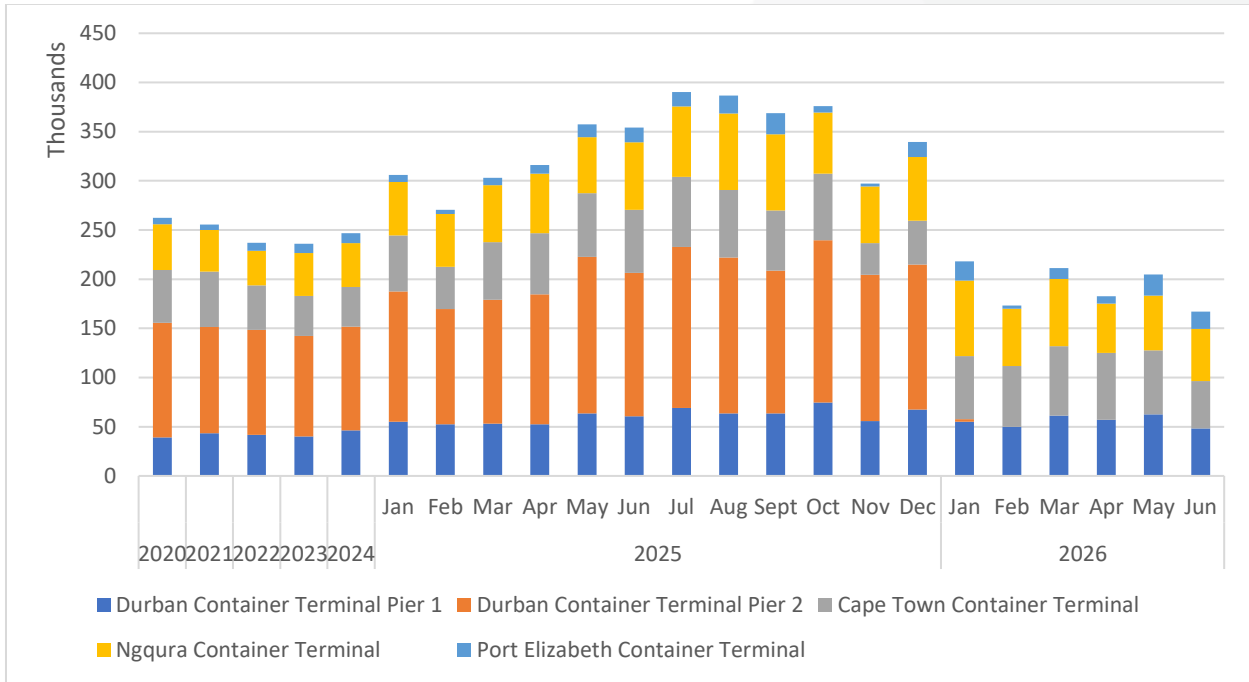
Table 3 – Container Ports – Weekly flow projected for 22 to 28 June (measured in TEUs)

7-day flow projected (22/06/2026 – 28/06/2026)			
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)	2,060	14,418	↓17%
Cape Town Container Terminal	2,276	15,929	↓14%
Ngqura Container Terminal	2,239	15,675	↓19%
Port Elizabeth Container Terminal	436	3,049	↓62%
Other	843	5,903	↑143%
Total	7,853	54,974	↓16%

Source: Calculated from TPT, 2026. Updated 21/06/2026.

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 21/06/2026.

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:

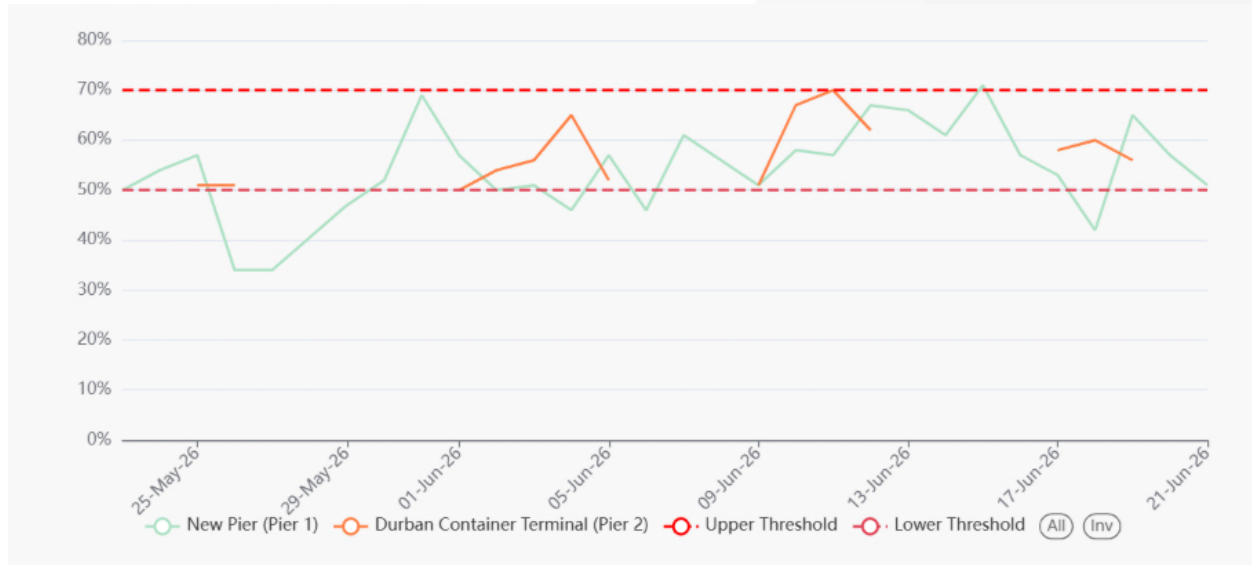
Table 4 – Vessel Dwell Time

Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.4	2.6
Cape Town	FPT	0.0	2.8
Cape Town	MPT	1.6	1.3
Durban	Pier 2	1.0	3.2
Durban	Pier 1	1.1	1.9
East London	MPT	0.0	3.3
Ngqura	NCT	2.5	2.6
Port Elizabeth	PECT	4.5	1.6

Source: Calculated from Marine Traffic AIS data, 2026. Updated 24/06/2026.

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

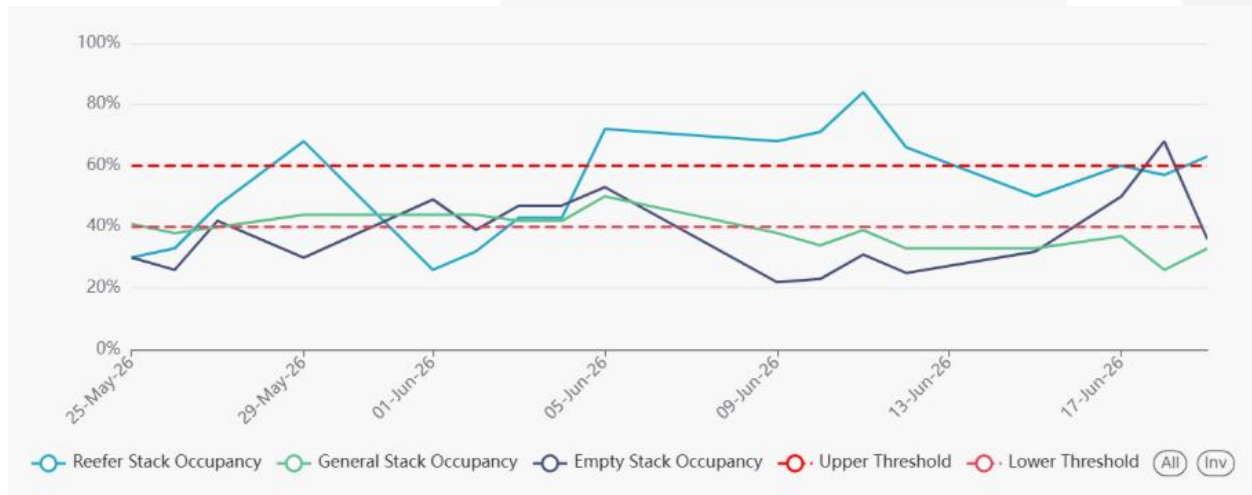
Figure 4 – Stack occupancy in Durban, general-purpose containers (23 May to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 21/06/2026.

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 (25 May to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 21/06/2026.

b. Summary of port operations

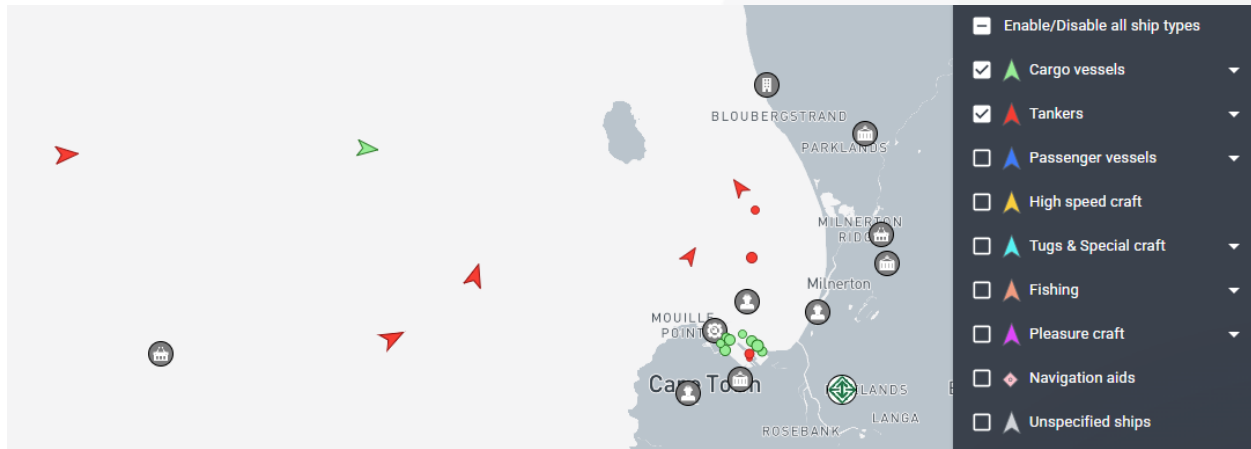
i. Cape Town

The Cape Town Container Terminal reported a significant increase in waterside volumes from the previous week (up 25%). Vessel delays remained limited, with vessels spending an average of five hours at anchorage and 50 hours at berth. Equipment availability remained strong with an average of eight out of nine cranes and 27 out of 32 RTGs available throughout the week. Weather-related delays were reported throughout the week, though they had little impact on waterside volumes.

Cape Town Multi-Purpose Terminal had an exceptionally quiet week, with waterside volumes declining sharply as the terminal completed work on a vessel carried over from the previous week, with no additional

vessels calling at the terminal. Equipment availability remained stable, averaging two out of three cranes and three out of five straddle carriers available throughout the reporting period.

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



Source: Marine Traffic. Updated 21/06/2026 at 14:00.

ii. Durban

Pier 1 reported a minor increase in waterside volumes, paired with a slight increase in vessel calls. Vessels spent an average of 29 hours at anchorage and 53 hours at berth. The **TTT** for the week averaged **~60 minutes (↑43%, w/w)**, and the average **staging time** was **~35 minutes (↑46%)**.

Durban Gateway Terminal experienced a slight reduction in waterside throughput, down from **2,661 to 2,606 containers per day (↓2%, w/w)**. Vessel activity remained relatively steady, with an average of two vessels at anchorage, waiting around 24 hours, and spending 70 hours at berth.

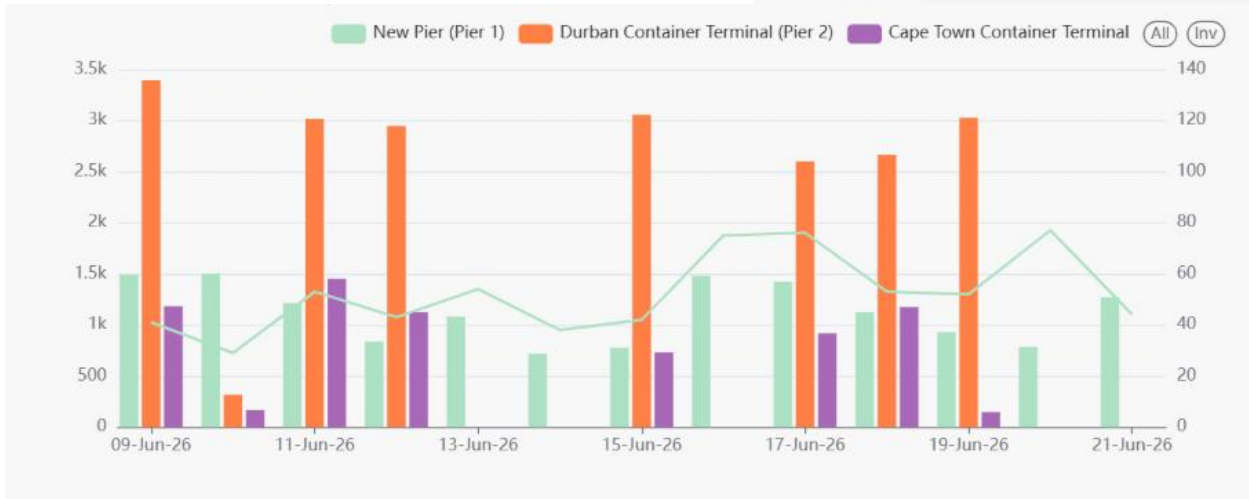
Durban Multi-Purpose Terminal reported a significant decline in waterside volumes. Despite lower volumes, vessels generally berthed on arrival, spending an average of one hour waiting at anchorage and 101 hours at berth. Equipment availability remained stable, averaging three out of four cranes throughout the week.

Lastly, A fire incident at D Berth within Durban's Point Multi-Purpose Terminal temporarily affected operations on the evening of 22 June, with Transnet Port Terminals confirming that the affected section resumed operations approximately an hour later. The fire was extinguished, no injuries were reported, affected stakeholders were informed, and investigations into the cause of the incident are underway.⁶

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.

⁶ Singh, K. 23/06/2026. [Durban Port fire incident: No injuries reported as investigations begin](#).

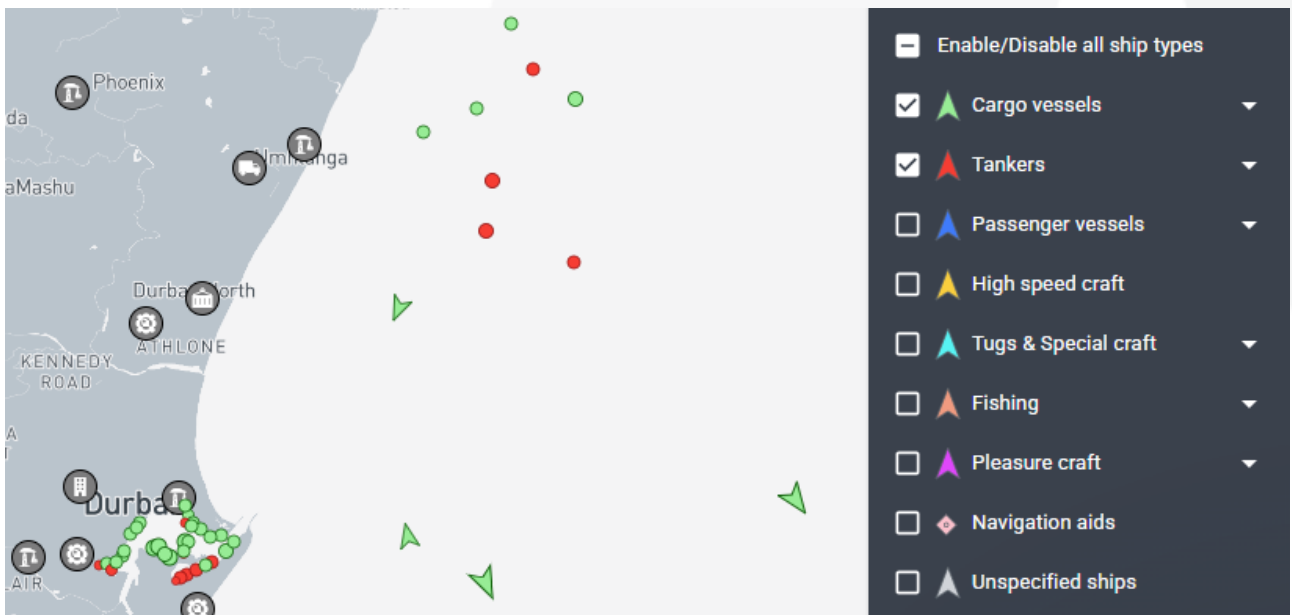
Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 21/06/2026.

The queue of container vessels waiting outside Durban **was again stable** this week. On Wednesday morning (24 June), **three** container vessels were waiting outside at anchorage for Durban, **two** for DGT and **one** for Point. The queue of dry (**two**), liquid (**five**), and breakbulk (**zero**) **was stable** from last week:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 21/06/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal had another stable week regarding waterside performance, with marginal fluctuations. Vessels spent an average of 56 hours at anchorage and 65 hours at berth. Over the reporting period, the terminal had an average of seven out of eight cranes and 25 out of 30 RTGs available. Operations were strong in spite of waterside operations coming to a standstill due to two separate incidents where containers fell into the ocean. Further feedback on the cause of these abnormal incidents is yet to be received.

Port Elizabeth Container Terminal delivered a strong performance, with waterside volumes up by more than 50%. This strong performance is crucial, as vessels are spending an average of 108 hours at anchorage before berthing for 40 hours. Equipment availability remained stable, with all three cranes operational and 10 straddle carriers available throughout the week.

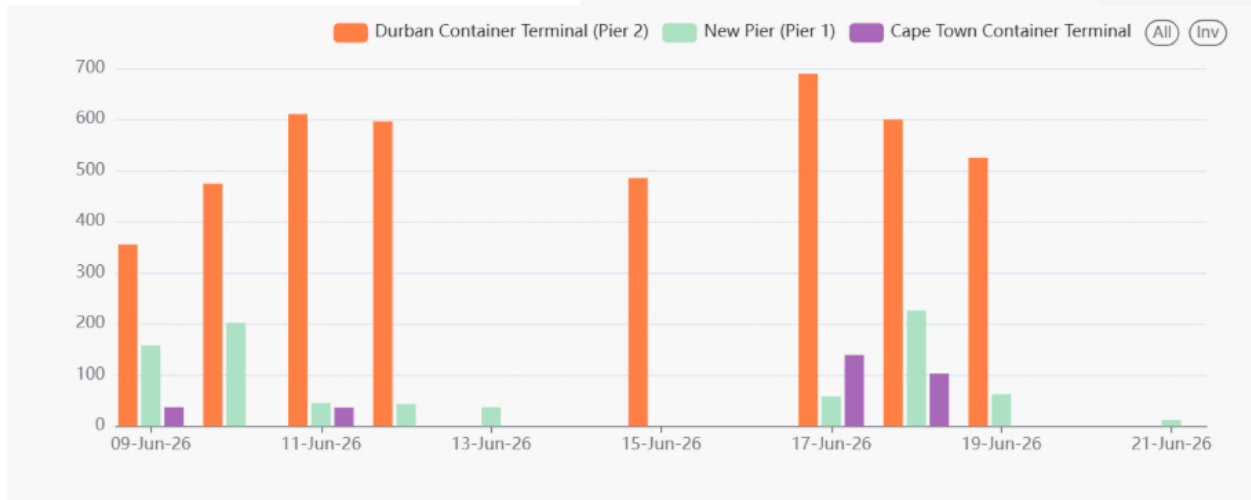
iv. Richards Bay

The daily average coal throughput for the week increased considerably and averaged roughly **127,766 tons** (↓23%, w/w) a day. An average of **25 trains** was serviced on the landside (up from last week’s 16), and **above the target** (22 trains).

v. Transnet Freight Rail (TFR)

In the last week (15 to 21 June), rail cargo on the ConCor line out of Durban was reported at **2,610** containers, down by **↓17%** from the previous week’s **3,050** containers.

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



Source: Calculated using data from Transnet, 2025. Updated 21/06/2026.

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 (15 to 21 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	668,682	4,680,772	↑5%
Volume outbound	387,128	2,709,898	↑8%
Total	1,055,810	7,390,670	↑6%

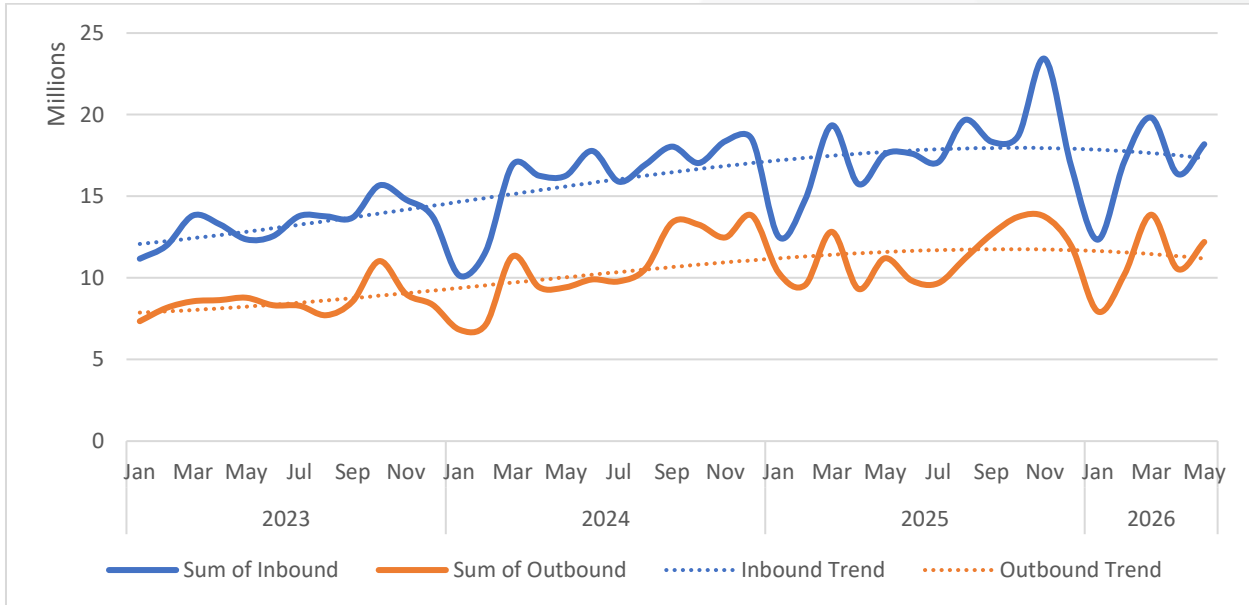
Courtesy of ACOC. Updated: 21/06/2026.

This week’s international cargo flows increased slightly for both inbound and outbound cargoes. The daily average amounted to ~667,000 kg inbound (↑5%, w/w) and ~387,000 kg outbound (↑8%). Current volumes

to and from ORTIA remain significantly above the commensurate volumes of June last year (**↑18%**) and also above the pre-pandemic June of 2019 (**↑16%**).

The following figure shows the international air cargo flows to and from ORTIA 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, 24 June) per airport indicate:

- ORTIA: **9.3 days** (target: 5 days)
- CTIA: **3.9 days** (target: 4 days)
- Durban: **~9 days** (target: 5 days)

3. Road and Regional Update

a. Lebombo border post update

In the last week (15 to 21 June), movements increased by exactly **100 trucks**, as trains from KM4 to Maputo were stable (an average of **2 trains per day**).

- Truck volumes through the border post increased to **1,545 HGVs per day** (**↑6%**, w/w).
- Overall, queue times were stable at an average of **~4.7 hours** at the border.
- The average processing times were also stable at an average of **~4.4 hours** per crossing.

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

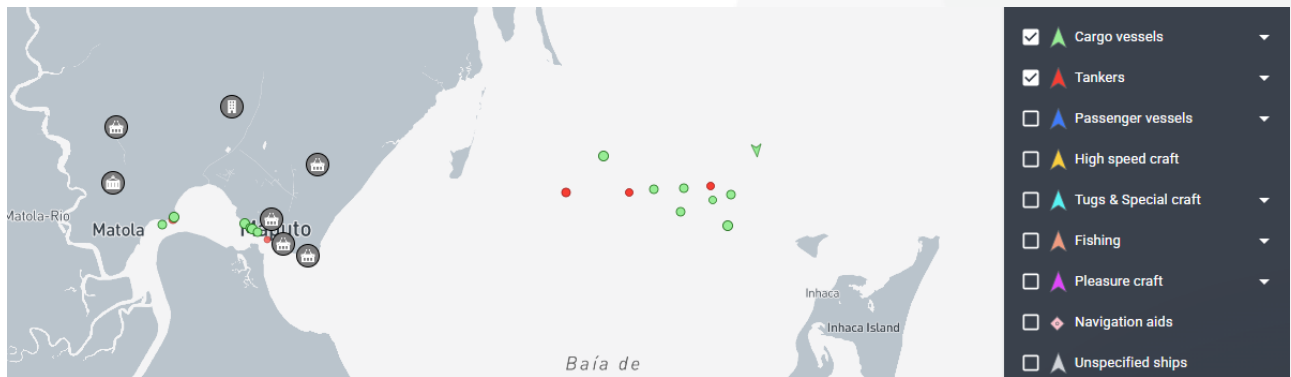
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,545	1,496	1,199	200	35	61	37	235
% (w/w)	6%	7%	7%	-1%	4%	-6%	-5%	2%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 21/06/2026.

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 21/06/2026 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 increased by around **three-quarters of an hour** from last week, as transit time went in the opposite direction and increased by nearly **an hour**.
- The median border crossing times at South African borders decreased by around **half an hour** on average, averaging **~7.8 hrs (↓4%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by slightly more than **an hour**, averaging **~8.2 hrs (↑15%)**.

1. Namibia: ASYCUDA World declaration changes:

- a. The Namibia Revenue Agency advised that changes have been made to ASYCUDA World for Block 2: Exporter and Block 8: Importer details.
- b. Importer and exporter details can reportedly no longer be amended through a Voucher of Correction.
- c. Where these details are incorrect, the SAD500 must be cancelled and replaced, making accurate upfront declaration data more important.

2. Richards Bay: port-access infrastructure concerns:

- a. Transporters have raised concerns about the condition of port-access infrastructure at Richards Bay, citing vehicle damage and higher operating costs.
- b. Industry representatives have requested intervention from the Minister of Transport, with calls for clearer accountability on maintenance and rehabilitation.
- c. Operators have also questioned how truck access fees are being allocated relative to the condition of the facilities.

3. Zambia: immigration compliance risks:

- a. Industry reports indicate increased concern around passport-stamping and immigration-compliance checks on Zambian corridors.
- b. Drivers are advised to verify that passport stamps have been correctly applied and recorded before proceeding, to avoid fines or delays at subsequent checkpoints.

4. Kasumbalesa: renewed congestion:

- a. Queues around Kasumbalesa are reportedly increasing again.

- b. Delays are being attributed to slower border processing, newer officials at the post, and ongoing border-facility upgrades.
- c. The upgrades should support longer-term efficiency, but are currently adding to short-term transit delays.

5. Zimbabwean Exemption Permit extension:

- a. The Zimbabwean Exemption Permit has reportedly been extended to 28 May 2027.
- b. The extension provides affected permit holders with additional administrative certainty, although employers and transporters should continue monitoring compliance requirements.

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

Table 7 – Delays⁷ summary – South African borders⁸ (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	581	17.6	4.4	17.4	17,430	4,067
Beitbridge	Zimbabwe-SA	547	5.4	1.3	5.3	16,410	3,829
Groblersbrug	SA-Botswana	212	12.2	1.6	12.1	6,360	1,484
Martin’s Drift	Botswana-SA	148	4.8	1.2	4.5	4,440	1,036
Kopfontein	SA-Botswana	211	9.9	2.0	9.5	6,330	1,477
Tlokweng	Botswana-SA	54	0.6	0.2	0.4	1,620	378
Vioolsdrift	SA-Namibia	30	4.0	2.0	4.0	900	210
Noordoewer	Namibia-SA	20	2.1	0.4	2.1	600	140
Nakop	SA-Namibia	30	3.6	0.6	3.4	900	210
Ariamsvlei	Namibia-SA	20	1.1	0.4	1.1	600	140
Skilpadshek	SA-Botswana	303	9.5	2.1	9.3	9,090	2,121
Pioneer Gate	Botswana-SA	80	1.7	1.1	1.4	2,400	560
Ramatlabama	SA-Botswana	148	2.7	0.4	2.4	4,440	1,036
Ramatlabama	Botswana-SA	76	0.4	0.1	0.3	2,280	532
Lebombo	SA-Mozambique	1,400	4.7	1.3	4.4	42,000	9,800
Ressano Garcia	Mozambique-SA	1,392	1.5	0.3	1.3	41,760	9,744
Sum/Average		5,252	5.1	1.2	4.9	157,560	36,764

Source: Calculated from [TransAfricaBorder](#) & Crickmay, week ending 14/06/2026.

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	12.2	4.2	11.9	9,600	2,240
Central Corridor	798	4.9	0.3	1.0	23,940	5,586
Dar Es Salaam Corridor	1,819	24.5	5.7	27.8	54,570	12,733
Maputo Corridor	2,792	3.1	0.8	2.9	83,760	19,544
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,613	16.7	3.4	17.9	108,390	25,291

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 Ramatlabama border post between South Africa and Botswana has been added.

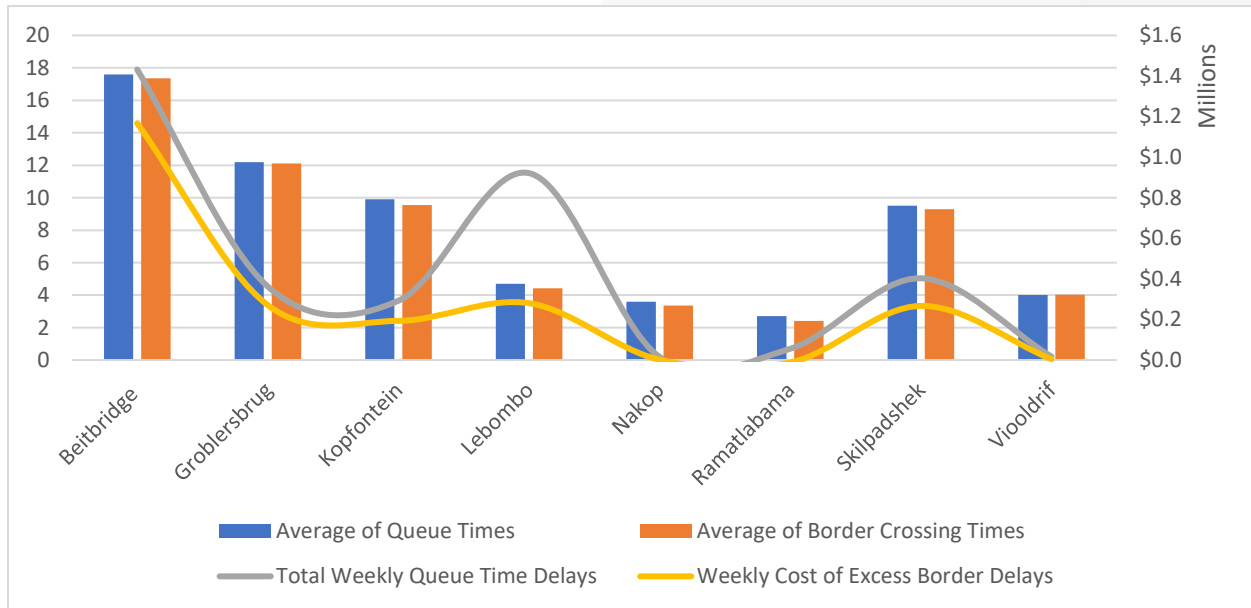
⁹ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Northern Corridor	2,817	0.4	0.1	0.3	92,520	21,588
WBNDL Corridor	902	3.6	0.9	3.4	27,060	6,314
Trans Cunene Corridor	100	2.7	0.8	2.6	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	18.4	0.9	18.6	3,480	812
Sum/Average	13,504	8.2	1.6	8.2	413,130	96,397

Source: Calculated from [TransAfricaBorder](#) & Crickmay, week ending 14/06/2026.

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

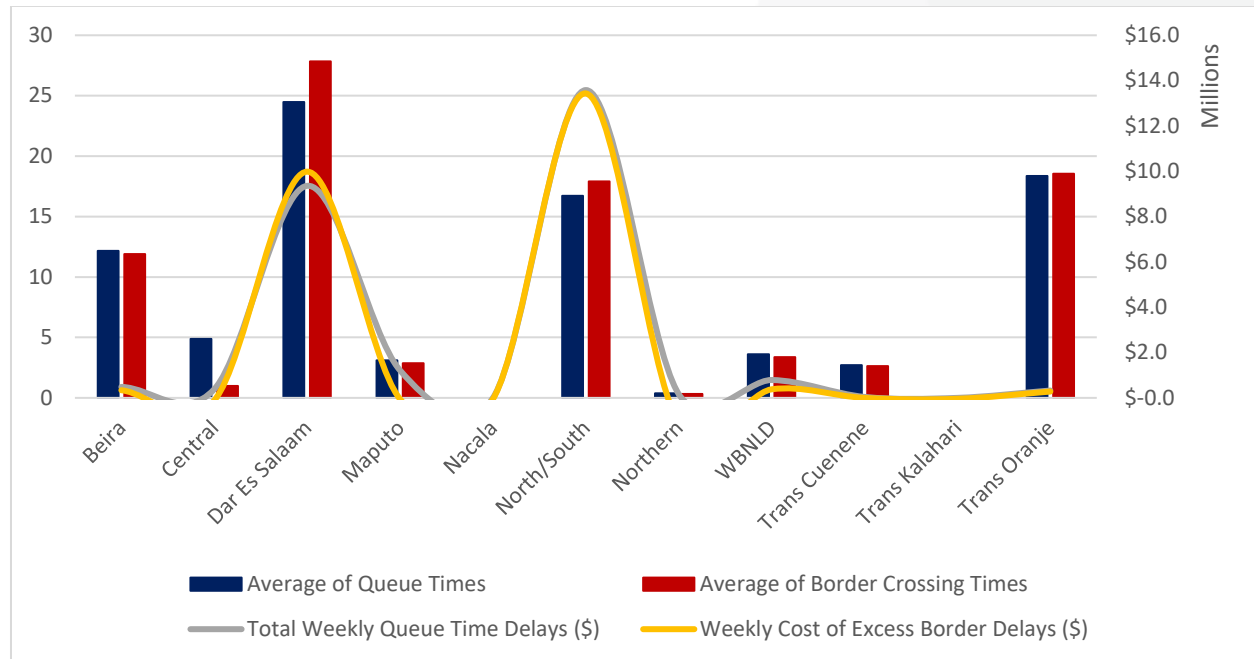
Figure 12 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: Calculated from [TransAfricaBorder](#) & Crickmay week ending 14/06/2026.

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 14/06/2026.

In summary, cross-border queue time averaged **~8.2 hours** (up by **~0.7 hours** from the previous week's **~7.5 hours**), indirectly costing the transport industry an estimated **\$24.3 million (R434 million)**. Furthermore, the week's average cross-border transit times hovered around **~8.2 hours** (up by **~0.9 hours** from the **~7.2 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$23 million (R379 million)**. The total indirect cost for the week amounts to an estimated **~\$49.3 million (R812 million)**, up by **↑15%** from the **~R704 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

Only **nine (9) container ships** have departed from the Persian Gulf after the Iran-US peace deal was signed on 17 June, including 6 Iranian ships. The slow pace of evacuations still leaves **more than 50 containerships** stranded in the Gulf due to uncertainty over Iran's terms for transit. Two Iranian-linked ships of over 6,000 TEU were scrapped in the last 2 weeks, marking the largest containerships to be commercially scrapped since 2020.¹⁰ Elsewhere, according to the *IMF Port Watch tracker*, some **26 dry bulk** and **31 tankers** have transited the Strait¹¹, as the IMF contemplates evacuating some **11,000-plus seafarers**.¹²

¹⁰ Linerlytica. 22/06/2026. [Market Pulse - week 25](#).

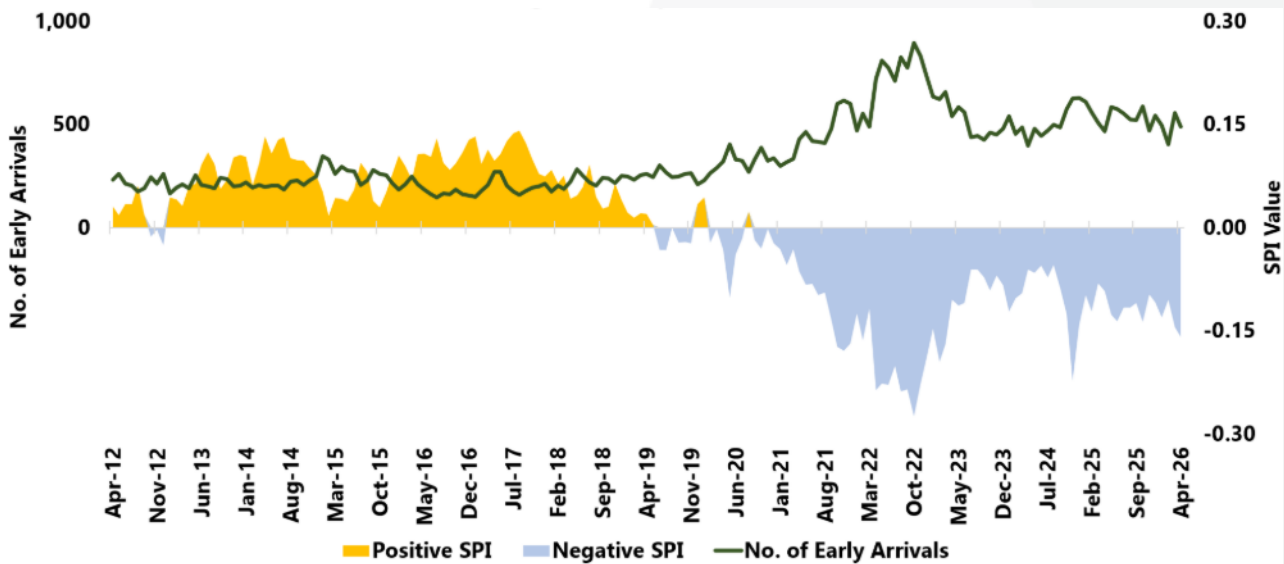
¹¹ IMF. 24/06/2026. [Trade Disruptions in the Strait of Hormuz](#).

¹² Manaadiar, H. 24/06/2026. [Getting it Strait: From 20,000 stranded seafarers in Hormuz to 11,000 departures](#).

ii. Vessel delays and carrier orderbook

Sea-Intelligence this week notes that conventional vessel-delay metrics may understate the severity of current liner-network disruption, as shipping lines increasingly add structural schedule buffers to absorb operational volatility. This schedule padding lengthens published transit times and produces more early arrivals, which register as “negative delays” and reduce the global average delay figure. As illustrated, a negative *Schedule Padding Index* (SPI) value indicates the artificial addition of schedule buffers, which corresponds directly with a relatively higher number of early vessel arrivals:

Figure 14 – Relationship between structural buffering and early vessel arrivals

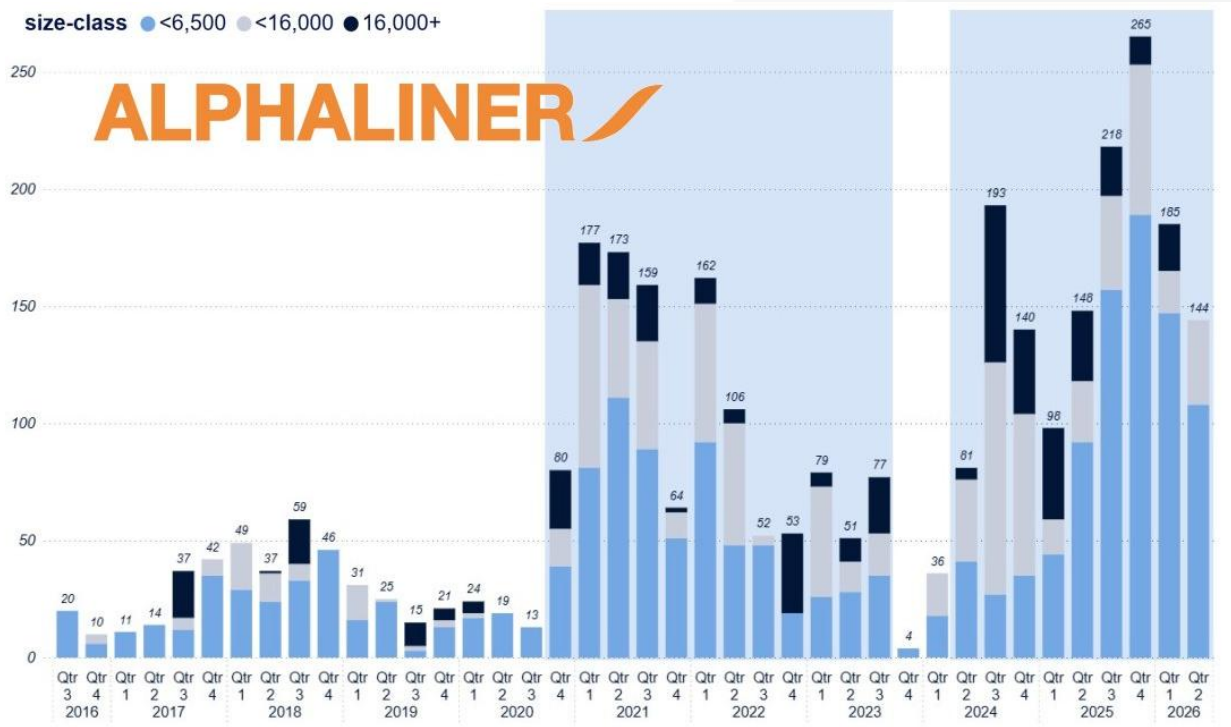


Source: [Sea Intelligence](#)

Pre-pandemic, the SPI averaged **+0.06 days**, and early arrivals accounted for only **1.9%** of deep-sea calls. In 2022, the index fell to **-0.20 days**, with early arrivals rising to **6.9%**. In early 2026, continued *Red Sea* and *Strait of Hormuz* diversions kept the index negative, at **-0.14 days**.

The schedule-reliability discussion also needs to be read against a changing supply-side backdrop. Alphaliner notes that the global containership orderbook is now approaching **13 million TEU**, equivalent to **38.3% of the cellular fleet** in service, but the composition of new contracting has shifted materially. Whereas the post-pandemic ordering cycle and early-2024 deals were dominated by large and ultra-large vessels aimed at mainline scale economies, contracting since mid-2025 has moved decisively toward smaller and mid-sized tonnage.

Figure 15 – Containership orders per vessel size-class (units)



Source: [Alphaliner](#)

Since July 2025, **74% of new vessel orders** have been for ships **below 6,500 TEU**, compared with less than 30% in the comparable period a year earlier. This suggests that carriers are increasingly responding to capacity pressure in regional, feeder and flexible deployment segments, rather than only adding mainline mega-ship capacity.

iii. Container freight rates and container industry summary

The positive momentum in the container market continues with the mid-June rate hikes sticking without rollbacks in the strongest rate ascent since the Red Sea diversions started at the end of 2023. Carriers are gearing for another major rate hike in July with increases as high as **\$5,000/FEU on certain routes**. Cargo demand is now clearly outpacing the availability of vessel slots, with the peak season in full swing, coupled with the strong growth of cleantech exports out of China. Containership supply remains very tight with port congestion continuing to take away effective supply as **capacity at anchorages rose to 3.4m TEU** last week.¹³ Expectations are for the weekly rates to continue to increase and will be reported on again next week.

b. Global air cargo industry

The latest weekly data from WorldACD indicate that the global air cargo market remained broadly stable in week 24, despite renewed hostilities in the Middle East. Worldwide tonnage increased by **↑1% week-on-week**, while global capacity was unchanged, and pricing remained flat at an average of **\$3.23/kg**.




















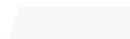
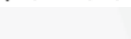
¹³ Linerlytica. 22/06/2026. [Market Pulse - week 25](#).

Figure 16 – Capacity, chargeable weight and rates (past two to five weeks)

Origin Regions

last 2 to 5 weeks



	Capacity ¹			Chargeable weight ¹			Rate ¹		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		+2%	+2%		-4%	+5%		-5%	+37%
Asia Pacific		+0%	+5%		-0%	+11%		+1%	+33%
C. & S. America		-1%	+3%		-4%	+5%		-1%	+10%
Europe		-1%	+1%		+1%	+6%		-1%	+31%
M. East & S. Asia		+5%	-5%		+4%	+10%		-3%	+47%
North America		-1%	+0%		+10%	+7%		-2%	+23%
Worldwide		+0%	+1%		+1%	+9%		-0%	+33%

Source: [World ACD](#)

On a two-week-on-two-week basis, global chargeable weight was also up **↑1%**, with pricing flat, suggesting limited immediate market disruption. Year-on-year comparisons remained stronger, with global chargeable weight up **↑10%**, led by double-digit growth from the Middle East & South Asia, Africa and Asia Pacific. MESA traffic continued to recover after Eid al-Adha, although capacity from the region fell by **↓2%** week-on-week. Asia Pacific–Europe volumes increased slightly, while Asia Pacific–USA demand softened. Rates remain elevated year-on-year, with global pricing around one-third higher than in 2025, despite limited weekly movement.

ENDS¹⁴

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.