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Cargo Movement Update #288[1]

Date: 28 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)	28,383	32,336	**60,719**	30,674	34,947	**65,621**	↓7%
Air Cargo (tons)	4,730	2,950	**7,680**	4,681	2,710	**7,391**	↑4%

Monthly Snapshot

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

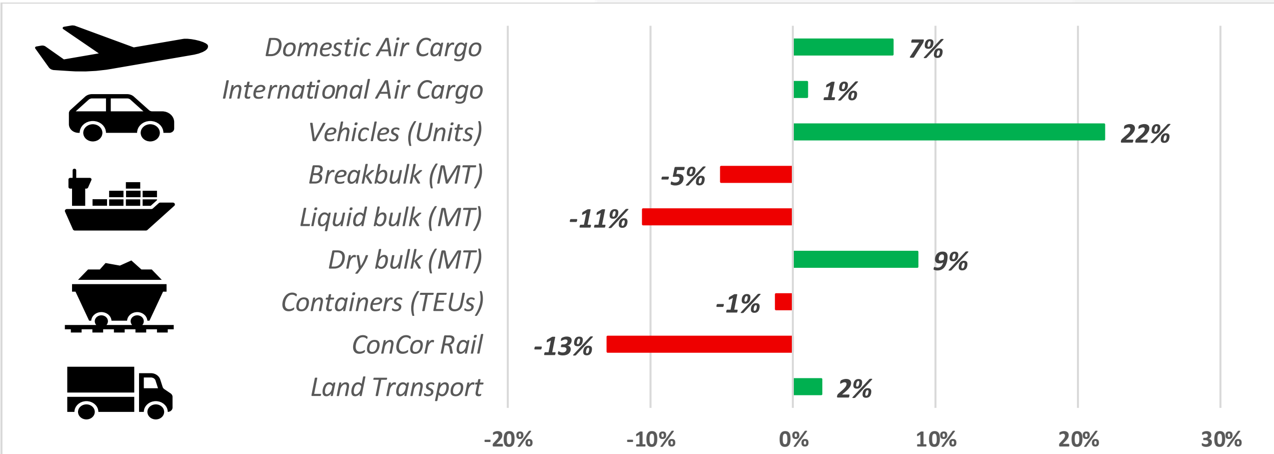
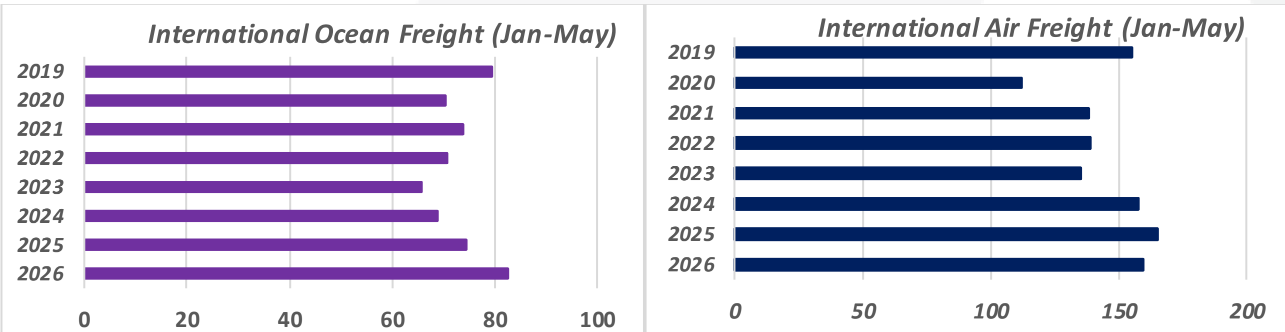


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **8,674 TEUs** was handled per day, with **7,912 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2,611** containers, up by **↑0.01%** from last week.
- Cross-border queue: **↑0.4 hrs**; transit: **↑0.8 hrs**; SA borders: **~9.6 hrs** (**↑23%**); SADC: **~8.9 hrs** (**↑9%**).
- Port congestion at its highest level since 2022, with **10.9%** of the **global fleet waiting at anchorages**.
- Global container freight rates have doubled in the last two months, rising another **↑9%** (w/w) **to $4,530**.
- Global air cargo remained tight, with worldwide rates up **↑1%** (w/w) to **$3.24/kg** and still **↑35%** (y/y).

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *288th* 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 **8,674 TEUs** was handled daily, a decrease from **9,374 TEUs** the previous week.

Port operations remained generally stable this week, with mixed performance across the national container network. In the Western Cape, Cape Town Container Terminal recorded lower waterside volumes following weather disruptions, while Cape Town Multi-Purpose Terminal showed a notable recovery in activity. Durban terminals continued to perform well, with Pier 1 Container Terminal maintaining stable operations supported by improved equipment availability. At the same time, Durban Gateway Terminal and Durban Multi-Purpose Terminal both reported stronger waterside performance. In the Eastern Cape, Ngqura Container Terminal showed modest improvements, although anchorage congestion remains, while Port Elizabeth Container Terminal continued to experience extended vessel delays. Overall, strong equipment availability across the major container terminals continued to support operational resilience.

Globally, following the tentative reopening of the Strait of Hormuz, UNCTAD cautioned that trade conditions should not be regarded as fully normalised, despite Brent crude easing back to around **$73/bbl**. The Strait normally carries around one-fifth of global oil and gas supplies, and the more than **100-day disruption** has left adjustment lags across transport, food and fertiliser supply chains. The central risk is therefore no longer only immediate energy availability, but the delayed pass-through of higher fuel, gas and fertiliser costs into agricultural production, freight costs, household budgets and vulnerable-economy inflation.

Container shipping has also not fully normalised. Linerlytica reports that **26 containerships**, totalling **195 000 TEU**, have withdrawn from the Persian Gulf, while more than **60 vessels** are deployed on intra-Gulf services. Broader market tightness remains evident, with TEU-mile demand growth at **↑7.3%**, vessel supply growth at **↑5.4%**, port congestion at its highest level since 2022, and **10.9%** of the global fleet waiting at anchorages.

Operational performance showed some improvement, but from a still-fragile base. *Sea-Intelligence* reported that global liner schedule reliability improved by **↑2.5%** in May to **64.7%**, the strongest level of the year, although reliability remained **↓1.2%** lower year-on-year and average delays for late vessels worsened to **5.52 days**. Freight rates also continued rising sharply, with Drewry's *WCI* up **↑9%** (w/w) to **$4 530/40ft**, approximately doubling in two months. Transpacific and Asia–Europe rates strengthened further, supported by tight capacity, blank sailings, peak-season demand, GRIs/PSS and persistent geopolitical uncertainty.

Led by outbound cargoes, this week's international air cargo flows increased for a third consecutive week. The daily average amounted to **~675,500 kg** inbound (**↑1%**, w/w) and **~421,500 kg** outbound (**↑9%**). Current volumes to and from ORTIA remain significantly above the commensurate volumes of June last year (**↑23%**) and also above the pre-pandemic June of 2019 (**↑21%**).

Global air cargo rates remained elevated in late June 2026, with worldwide prices edging up again and still well above last year (**↑35%**), while capacity was broadly stable but recovering in key Middle East lanes. Despite some relief from easing Gulf capacity constraints and lower jet fuel prices, strong pricing held across major trade lanes, especially Asia Pacific and Middle East & South Asia, indicating a market that was still tight and volatile. In other aviation news, FIATA has sought urgent clarification from airlines on whether and how they intend to implement expedited amendments to the *IATA Direct Air Waybill framework* from 1 July 2026, after FIATA argued that the formal review process had not been completed before the effective date. Lastly, on July 1, 2026, the European Union abolished its **€150 de minimis duty exemption**. In its place, the EU introduced a temporary, flat **€3 customs duty per individual item** (based on tariff classification) for low-value consignments.

On the N4 corridor, movements decreased by around **50 trucks**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**). Truck volumes through the border post decreased to **1,491 HGVs per day** (**↓4%**, w/w). Despite some minor instances of congestion, overall, queue times were stable at an average of **~4.2 hours** (**↓11%**, w/w) at the border. The average processing times were also stable at an average of **~4.1 hours** (**↓7%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time increased by around **half an hour** from last week, as transit time also increased – by **three-quarters of an hour**. The median border crossing times at South African borders increased by nearly **two hours** on average, averaging **~9.6 hrs** (**↑23%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) increased by **three-quarters of an hour**, averaging **~8.9 hrs** (**↑9%**). This week, on average, **three** SADC borders again took more than a day to cross, namely Chirundu OSBP, Dedza/Calomue OSBP and Kasumbalesa (the worst affected, taking around **five days** to cross from the **Zambian side**).

Cross-border developments this week include **(1)** worsening congestion at Kasumbalesa, where construction has reduced daily clearances into the DRC and pushed queues towards Kanyaka beyond 20 km; **(2)** industry concerns over new Durban Container Terminal driver-induction requirements, particularly for foreign drivers of South African-registered vehicles; and **(3)** Zambia's introduction of mandatory Advance Cargo Information submissions from 1 July 2026, alongside welcome fuel-price relief for road-freight operators.

For South Africa, the international situation reinforces both the opportunity and the constraint. Higher freight rates disrupted routing patterns and persistent geopolitical uncertainty raise logistics costs for importers and exporters, but they also underline the strategic value of reliable ports on the Cape route. South Africa is recovering from a low base: container volumes are improving, anchorage delays have fallen materially, and terminal productivity has strengthened, but the recovery remains "better, but too slow." The critical point is that improved vessel waiting times do not, by themselves, mean the logistics system is no longer a constraint, especially if rail volumes recover and additional cargo must be absorbed through Durban and other corridors. Operating recovery must therefore translate into structural recovery: recapitalisation, terminal equipment, digital systems, open-access rail capacity, private-sector participation and transparent whole-system performance measurement. Without that, South Africa risks observing global routing opportunities without converting them into durable trade competitiveness.

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 22 to 28 June (measured in TEUs)

7-day flow reported (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)	2,370	16,589	↓4%
Cape Town Container Terminal	2,053	14,373	↓22%
Ngqura Container Terminal	2,847	19,928	↑3%
Port Elizabeth Container Terminal	847	5,931	↓26%
Other	557	3,898	↑60%
Total	**8,674**	**60,719**	**↓7%**

Source: Calculated from TPT, 2026. Updated 28/06/2026.

An average of **~8,674 TEUs** (↓7%) was handled per day for the last week (*22 to 28 June, **Error! Reference source not found.***). Consequently, throughput was above the projected average of **~7,853 TEUs** (↑10% actual versus projected). For the coming week, a decreased average of **~7,912 TEUs** (↓9%) is predicted to be handled (*29 June to 5 July*, **Error! Reference source not found.**).

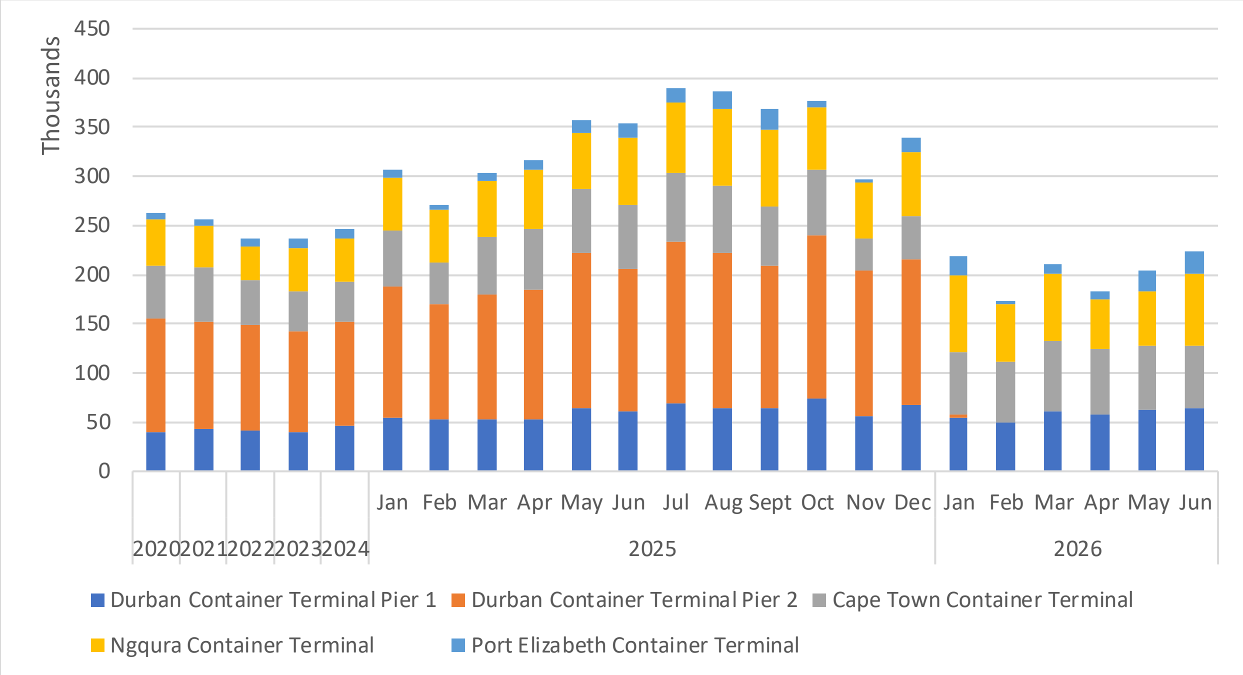
Table 3 – Container Ports – Weekly flow projected for 29 June to 5 July (measured in TEUs)

7-day flow projected (29/06/2026 – 05/07/2026)			
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)	2,000	13,999	↓16%
Cape Town Container Terminal	2,257	15,801	↑10%
Ngqura Container Terminal	2,341	16,387	↓18%
Port Elizabeth Container Terminal	448	3,138	↓47%
Other	866	6,062	↑56%
Total	**7,912**	**55,387**	**↓9%**

Source: Calculated from TPT, 2026. Updated 28/06/2026.

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 28/06/2026.

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:

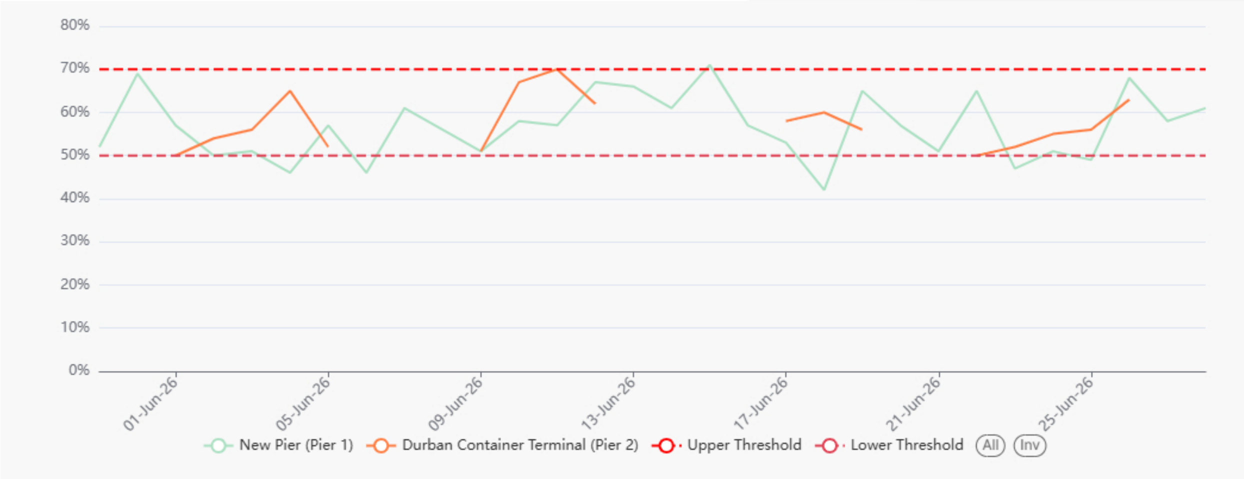
Table 4 – Vessel Dwell Time

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 30/06/2026.

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

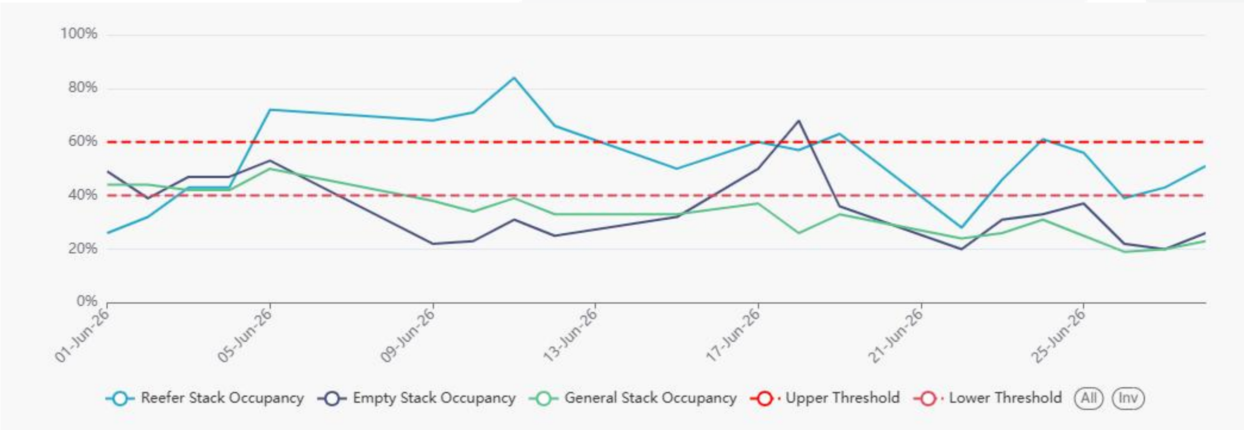
Figure 4 – Stack occupancy in Durban, general-purpose containers (30 May to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 28/06/2026.

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 (1 June to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 28/06/2026.

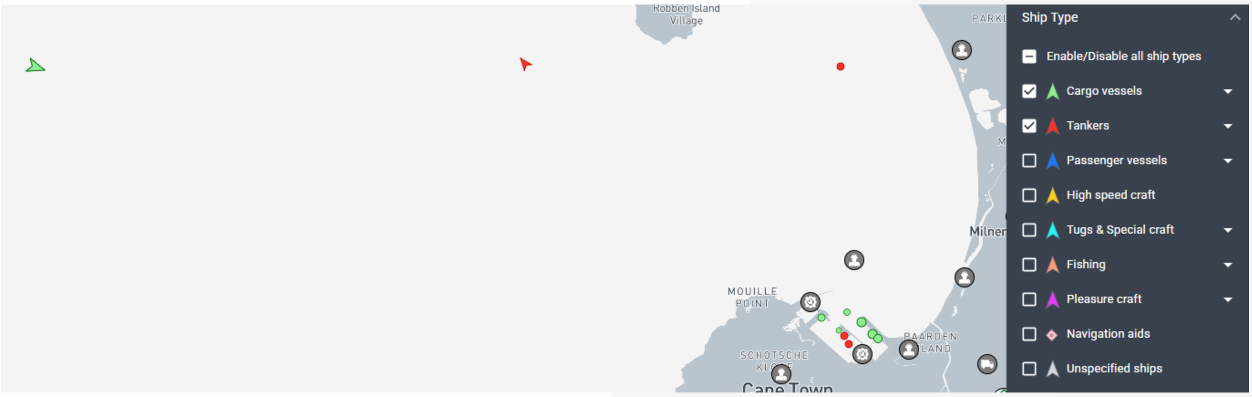
b. Summary of port operations

i. Cape Town

Cape Town reported a decline in waterside volumes from the previous week, in part likely due to the weather delays experienced towards the end of the week. Throughout the week, operations remained stable, with vessels spending 16 hours at anchorage and 36 hours at berth. Equipment availability remained strong, averaging eight out of nine STS cranes and 24 out of 32 RTGs available throughout the week.

Cape Town Multi-Purpose Terminal reported a significant increase in waterside volumes. Vessels spent an average of 100 hours at anchorage and 30 hours at berth. Equipment availability remained consistent, averaging two out of three cranes and three out of five straddle carriers throughout the reporting period.

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



Source: Marine Traffic. Updated 28/06/2026 at 14:00.

ii. Durban

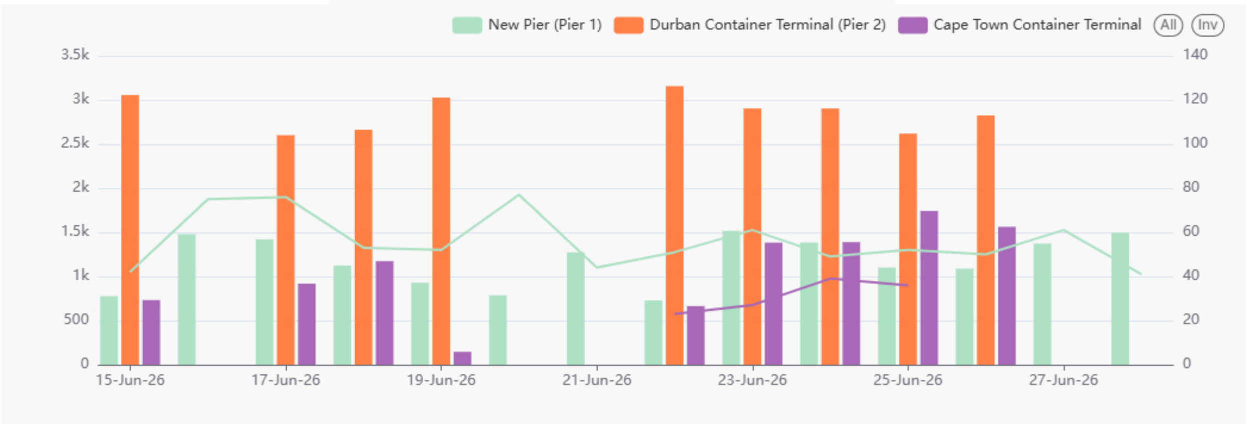
Pier 1 reported a relatively stable week, with a minor reduction in waterside volumes. Vessels spent an average of 18 hours at anchorage and 43 hours at berth, with around two vessels typically waiting at anchorage. The terminal reported strong equipment availability, averaging five out of seven cranes and 24 out of 25 RTGs available throughout the week, showing a consistent increase in RTG availability over the past few weeks, as a result of new equipment being introduced into the system. The **TTT** for the week averaged **~51 minutes** (**↓15%**, w/w), and the average **staging time** was **~37 minutes** (**↑6%**).

Durban Gateway Terminal's estimated volumes increased marginally from **2,606 containers** to **2,774 containers** (up by **↑4%**). In contrast, vessel waiting times increased to an average of 45 hours at anchorage and 82 hours at berth. Rail operations remained steady, though the containers on hand were higher than usual for the week. Still, it showed a slow decline towards the end of the week.

Durban Multi-Purpose Terminal experienced a significant recovery in waterside volumes, from a few slow weeks, though operations tapered down towards the end of the week. Vessel turnaround times remained strong, with vessels spending an average of 10 hours at anchorage and 43 hours at berth.

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.

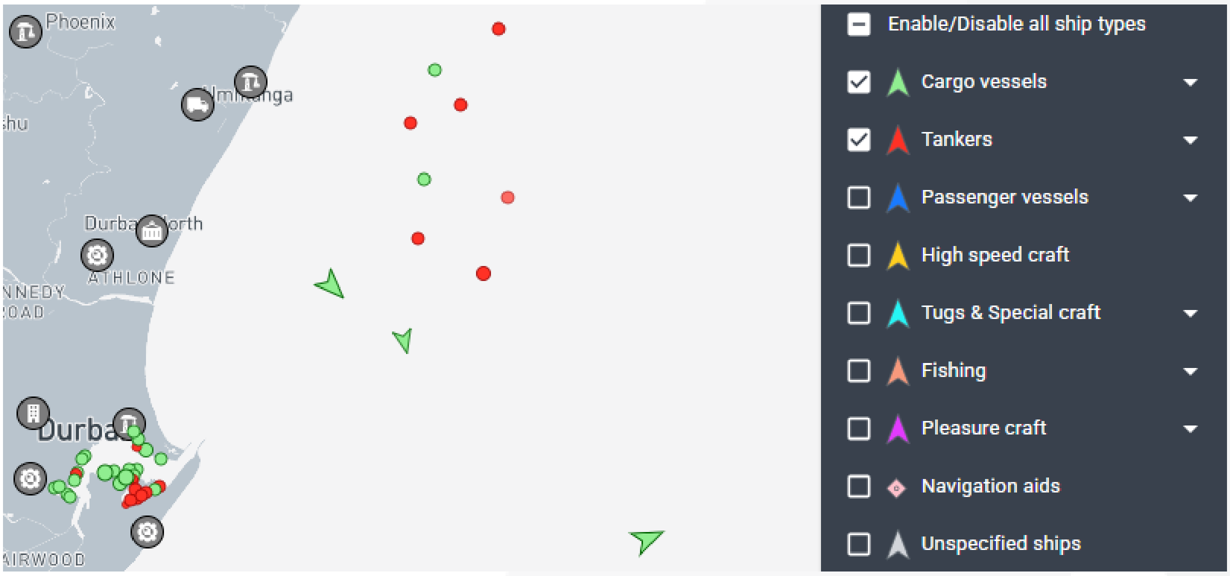
Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 28/06/2026.

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

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 28/06/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal maintained stable operations, with waterside volumes showing a slight increase from the previous week, which should support the clearing of the backlog. In spite of an improvement in operations, the terminal is experiencing some congestion, with an average of five vessels waiting at anchorage, with vessels waiting an average of 70 hours at anchorage, and 62 hours at berth. Equipment availability remained strong, averaging seven out of eight STS cranes and 23 out of 30 RTGs throughout the week.

Port Elizabeth Container Terminal reported a decline in waterside volumes, aggravating the backlog, with vessels spending an average of 119 hours at anchorage and 20 hours at berth. Equipment availability remained excellent, with all three cranes operational and all 11 straddle carriers available throughout the reporting period.

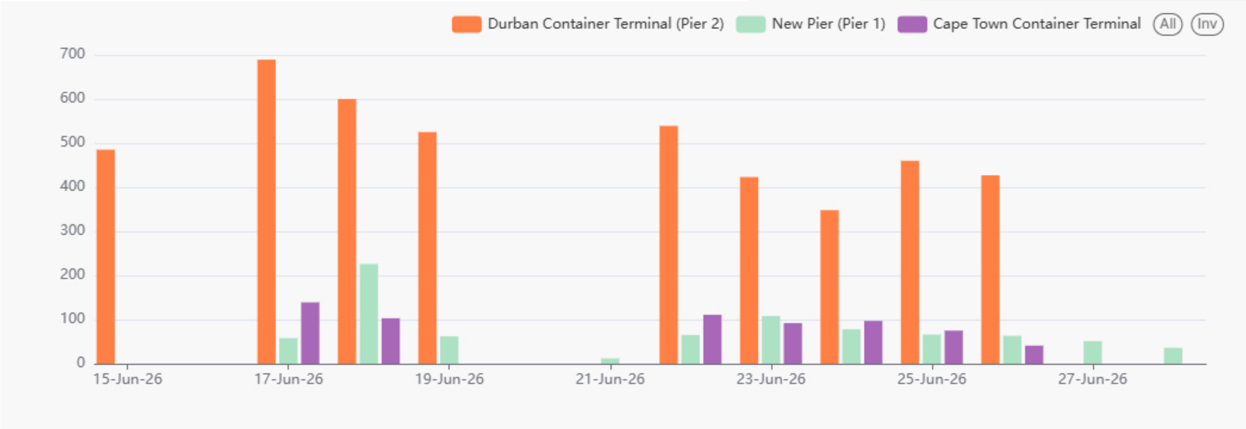
iv. Richards Bay

The daily average coal throughput for the week decreased only slightly and averaged roughly **127,507 tons** (**↓0.1%**, w/w) a day. An average of **24 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 (*22 to 28 June*), rail cargo on the ConCor line out of Durban was reported at **2,611** containers, up slightly by **↑0.01%** from the previous week's **2,610** containers.

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



Source: Calculated using data from Transnet, 2025. Updated 28/06/2026.

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 (*22 to 28 June*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *June 2025* was **~894,958 kg**.

Table 5 – International inbound and outbound cargo from OR Tambo

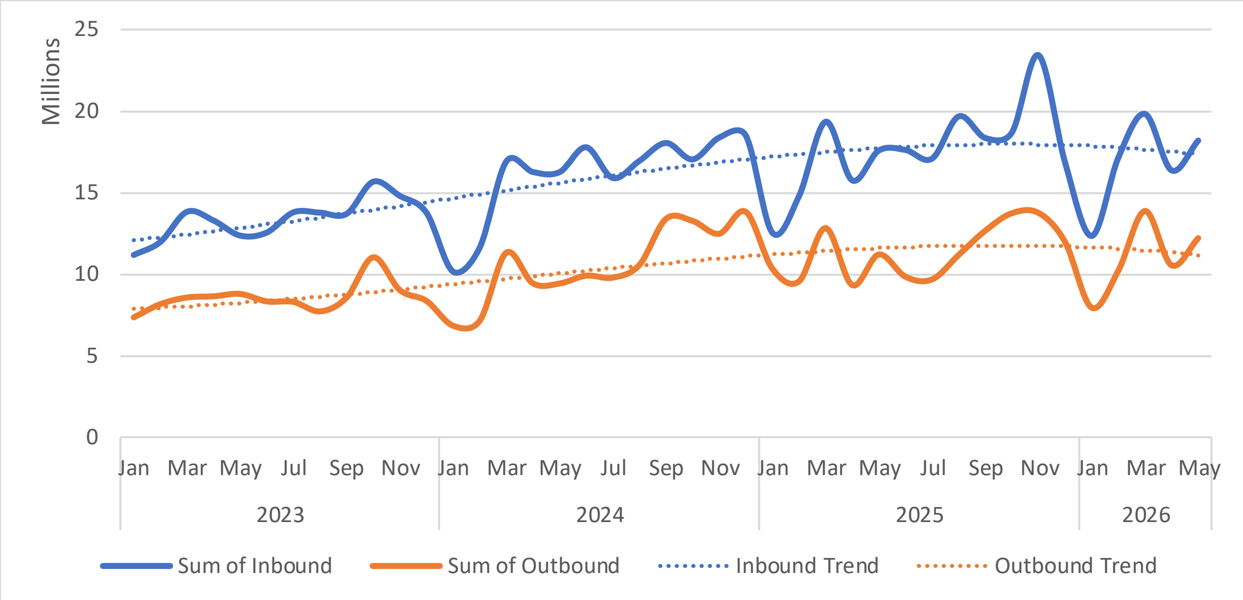
Flows	**Daily Ave.**	**Weekly Vol.**	**Change** (w/w)
Volume inbound	**675,647**	**4,729,530**	**↑1%**
Volume outbound	**421,477**	**2,950,338**	**↑9%**
Total	**1,097,124**	**7,679,868**	**↑4%**

Courtesy of ACOC. Updated: 28/06/2026.

Led by outbound cargoes, this week's international air cargo flows increased for a third consecutive week. The daily average amounted to **~675,500 kg** inbound (**↑1%**, w/w) and **~421,500 kg** outbound (**↑9%**). Current volumes to and from ORTIA remain significantly above the commensurate volumes of June last year (**↑23%**) and also above the pre-pandemic June of 2019 (**↑21%**).

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 Thursday, 2 July) per airport indicate:

- ORTIA: **9.6 days** (target: 5 days)
- CTIA: **3.6 days** (target: 4 days)
- Durban: **~7 days** (target: 5 days)

3. Road and Regional Update

a. Lebombo border post update

In the last week (*22 to 28 June*), movements decreased by around **50 trucks**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**).

- Truck volumes through the border post decreased to **1,491 HGVs per day** (**↓4%**, w/w).
- Despite some minor instances of congestion, overall, queue times were stable at an average of **~4.2 hours** (**↓11%**, w/w) at the border.
- The average processing times were also stable at an average of **~4.1 hours** (**↓7%**) per crossing.

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

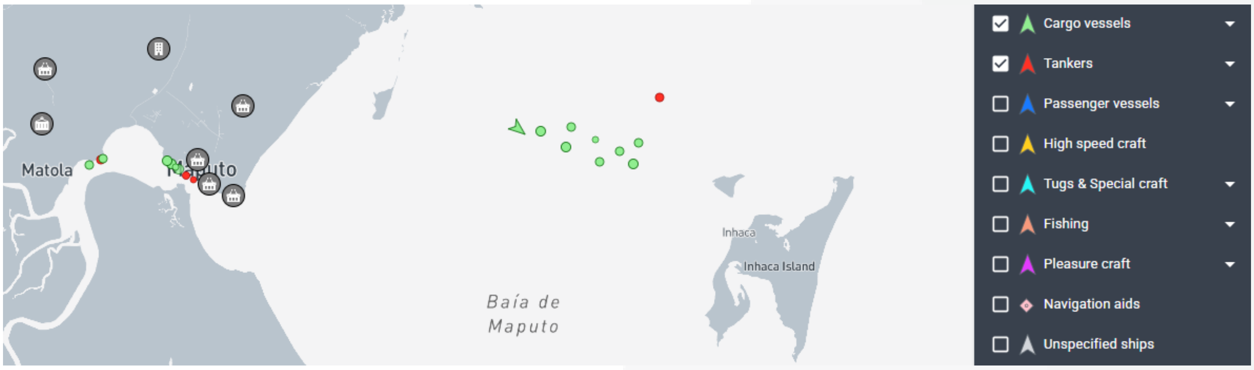
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,491	1,480	1,144	175	44	66	35	254
% (w/w)	**-4%**	**-1%**	**-5%**	**-14%**	**20%**	**7%**	**-6%**	**7%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 28/06/2026.

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 28/06/2026 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 **half an hour** from last week, as transit time also increased – by **three-quarters of an hour**.
- The median border crossing times at South African borders increased by nearly **two hours** on average, averaging **~9.6 hrs** (**↑23%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by **three-quarters of an hour**, averaging **~8.9 hrs** (**↑9%**).

1. **Kasumbalesa congestion worsens amid construction:**
   a. Construction in Kasumbalesa Town and at the border has significantly slowed processing into the DRC. Daily clearances have reportedly fallen from around **450–500 vehicles** to **200–250 vehicles**.
   b. The Chililabombwe Municipal Council has installed 15 mobile toilets and is providing water along the route, with a private operator reportedly developing new border facilities and truck-parking areas.
   c. The queue towards Kanyaka exceeded 20 km, with clearance taking around two days.
   d. A temporary “pay-and-go” system briefly improved movement but was abandoned later the same day, prompting transporters to request intervention from the Transit Bureau.
2. **DCT driver-induction requirements raise concerns:**
   a. New Durban Container Terminal driver-induction requirements have raised concerns among transporters and industry bodies.
   b. Drivers remain unclear on how verification will occur after completing the induction process.
   c. The requirements appear more burdensome for foreign drivers of South African-registered vehicles, with companies required to submit passports, asylum or work permits, and employment-confirmation letters.
   d. Drivers must also present documents in person on a designated day, raising questions over why the process cannot be handled at the border or through a more practical verification channel.
3. **Zambia introduces mandatory ACI submissions:**
   a. The Zambia Revenue Authority has confirmed that, from 1 July 2026, Advance Cargo Information must be submitted by email before goods enter or transit through Zambia.

b. The requirement applies to clearing agents, freight forwarders, transporters, importers, and other relevant stakeholders.

4. **Fuel-price relief supports road freight:**
   a. South African fuel prices will decline from 3 July 2026, with petrol falling by R1.95/litre and diesel by at least R3.14/litre.
   b. The reduction should provide short-term cost relief for road-freight operators.

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

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

Border Post	Direction	HGV[8] 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	515	18.8	4.3	18.5	15,450	3,605
Beitbridge	Zimbabwe-SA	539	4.7	1.2	4.4	16,170	3,773
Groblersbrug	SA-Botswana	229	19.9	2.1	19.6	6,870	1,603
Martin's Drift	Botswana-SA	199	5.1	1.0	5.1	5,970	1,393
Kopfontein	SA-Botswana	200	9.1	2.2	9.1	6,000	1,400
Tlokweng	Botswana-SA	48	0.7	0.2	0.4	1,440	336
Vioolsdrift	SA-Namibia	30	4.2	1.2	4.1	900	210
Noordoewer	Namibia-SA	20	2.2	0.5	2.1	600	140
Nakop	SA-Namibia	30	3.7	0.4	3.4	900	210
Ariamsvlei	Namibia-SA	20	1.1	0.3	1.1	600	140
Skilpadshek	SA-Botswana	259	15.1	2.0	15.1	7,770	1,813
Pioneer Gate	Botswana-SA	83	1.7	1.2	1.4	2,490	581
Ramatlabama	SA-Botswana	145	3.5	0.4	3.3	4,350	1,015
Ramatlabama	Botswana-SA	78	0.4	0.4	0.3	2,340	546
Lebombo	SA-Mozambique	1,593	4.2	1.4	4.1	47,790	11,151
Ressano Garcia	Mozambique-SA	1,527	1.5	0.3	1.3	45,810	10,689
Sum/Average		**5,515**	**6.0**	**1.2**	**5.8**	**165,450**	**38,605**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 21/06/2026.

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	8.9	1.7	8.7	9,600	2,240
Central Corridor	798	2.0	0.3	1.9	23,940	5,586
Dar Es Salaam Corridor	1,819	27.7	5.3	27.8	54,570	12,733
Maputo Corridor	3,120	2.9	0.8	2.7	93,600	21,840
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,265	19.7	3.8	21.7	97,950	22,855
Northern Corridor	2,817	0.3	0.1	0.3	92,520	21,588
WBNLD Corridor	843	4.3	0.9	4.1	25,290	5,901
Trans Cunene Corridor	100	2.8	0.6	2.7	3,000	700

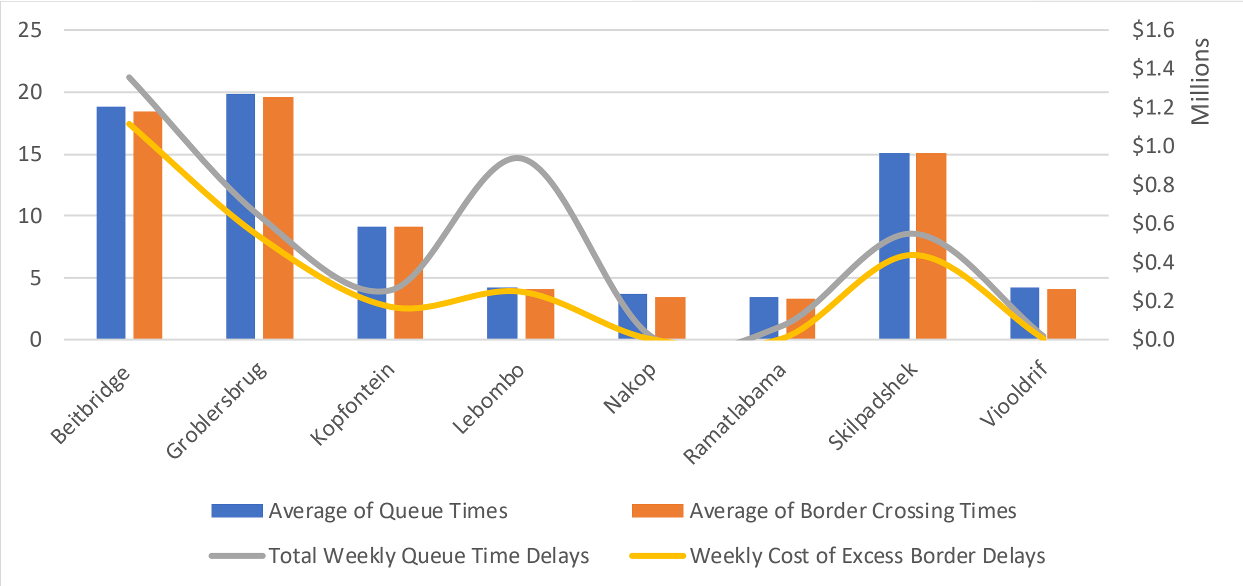
[6] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[7] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[8] 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
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	13.8	2.3	13.7	3,480	812
Sum/Average	**13,425**	**8.6**	**1.7**	**9.0**	**410,760**	**95,844**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 21/06/2026.

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

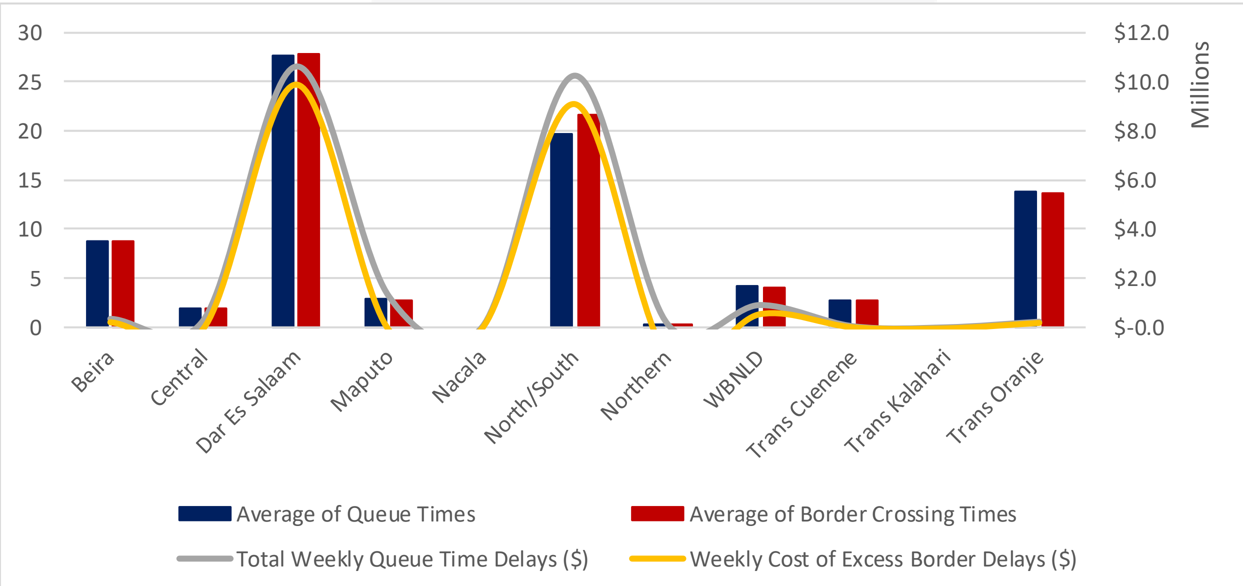
Figure 12 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 21/06/2026.

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 21/06/2026.

In summary, cross-border queue time averaged **~8.6 hours** (up by **~0.4 hours** from the previous week's **~8.2 hours**), indirectly costing the transport industry an estimated **$24.1 million** (**R396 million**). Furthermore, the week's average cross-border transit times hovered around **~9 hours** (up by **~0.8 hours** from the **~8.2 hours** recorded in the previous report), at an indirect cost to the transport industry of **$18.4 million** (**R303 million**). The total indirect cost for the week amounts to an estimated **~$42.5 million** (**R699 million**, up by **↑14%** from the **~R812 million** in the previous report).

4. International Update

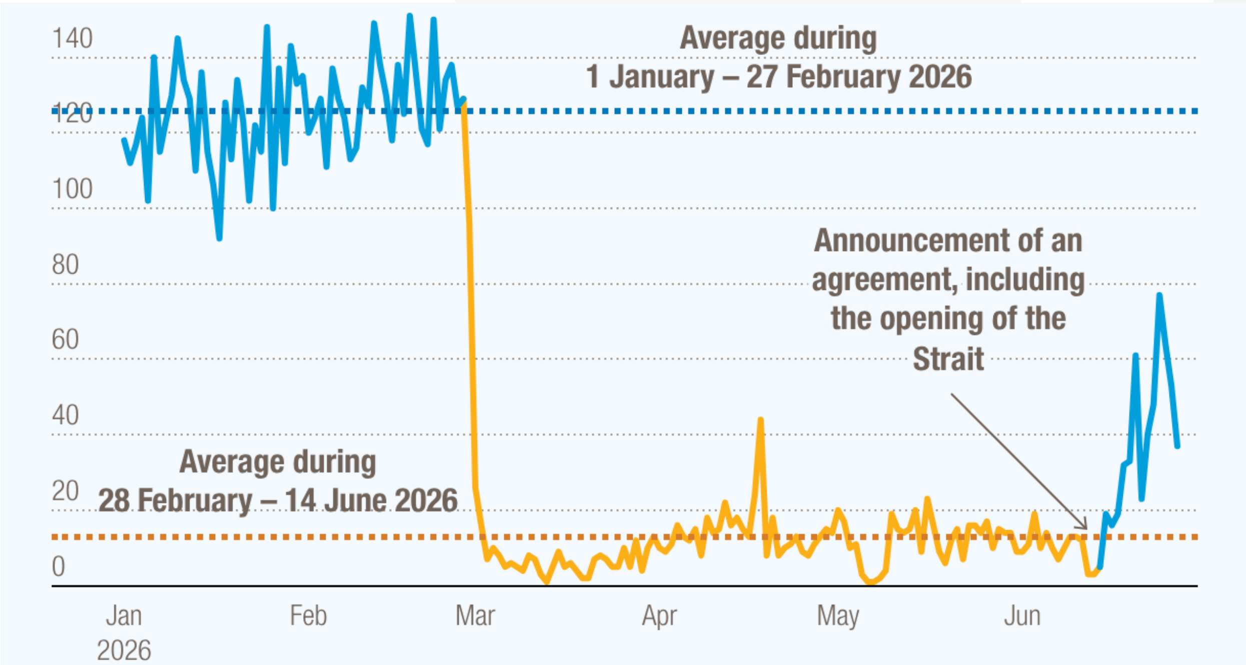
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Strait of Hormuz/Iran conflict

Following the peace deals and tentative opening of the Strait of Hormuz, UNCTAD cautions that the situation should not be read as a full normalisation of trade conditions.[9] The route normally carries around one-fifth of global oil and gas supplies, and the recent disruption lasted more than 100 days, leaving transport, food and fertiliser supply chains with adjustment lags even after the immediate energy shock eased. Brent crude has fallen back to around **$73/bbl**, close to pre-conflict levels. However, UNCTAD warns that earlier increases in fuel, gas and fertiliser costs may still pass through into agricultural production, freight costs and household budgets. Its central concern is therefore not only energy availability, but the delayed and uneven transmission of chokepoint disruption into food security, import costs and vulnerable-economy inflation.

Figure 14 – Daily ship transits through the Strait of Hormuz in 2026



Source: UNCTAD

[9] UNCTAD. 30/06/2026. Strait of Hormuz Disruptions: Beyond reopening - lasting impacts on vulnerable economies.

The distributional impact remains material. UNCTAD identifies 61 vulnerable economies exposed to oil and cereal import shocks linked to the disruption, including import-dependent economies such as Cape Verde and fragile staple-food importers such as Yemen. These economies face a combined exposure to higher fuel, electricity, transport and grain costs, with limited fiscal or logistical buffers to absorb the shock. UNCTAD also notes that a **↑5%** increase in food prices can significantly raise the risk of childhood wasting, underscoring that humanitarian and nutrition effects may persist after shipping lanes technically reopen.

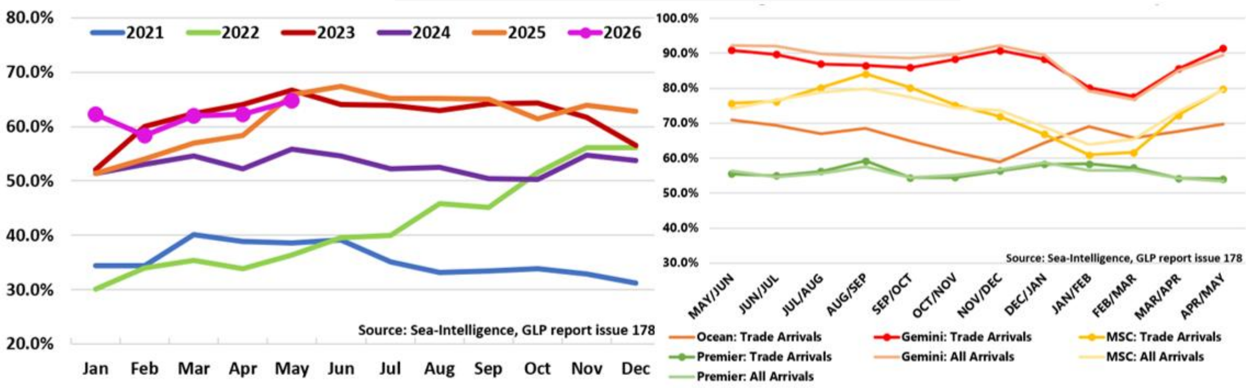
The current market backdrop supports this fragile-recovery assessment. An "eerie calm" in energy markets has followed the US-Iran interim peace deal of 17 June, with Middle East oil again entering the global market. However, there are warnings that this calm may be creating a false sense of security, given continuing uncertainty over Iranian control of the Strait, potential future levies on vessels entering and leaving the Gulf, and the absence of a permanent peace settlement.

Linerlytica's latest market pulse adds that container shipping has also not fully normalised. It reports that **26 containerships**, totalling **195 000 TEU**, have withdrawn from the Persian Gulf, while more than **60 vessels** are deployed on intra-Gulf services. Broader container-market tightness remains evident, with TEU-mile demand growth at **↑7.3%**, vessel supply growth at **↑5.4%**, port congestion at its highest level since 2022, and **10.9%** of the **global fleet waiting at anchorages**. The result is a shift from acute closure risk to rebalancing risk: energy prices have eased, but vessel positioning, congestion, insurance, war-risk pricing, fertiliser flows and food-cost pass-through remain unresolved.

ii. Global schedule reliability

Global liner schedule reliability improved further in May 2026, reaching its strongest level of the year. *Sea-Intelligence* reports that reliability has improved month-on-month since March, with May increasing by **↑2.5%** to **64.7%**. However, performance remained slightly weaker year-on-year, down by **↓1.2%**, while the average delay for late vessel arrivals deteriorated to **5.52 days**, up **0.04 days** month-on-month and **0.88 days** year-on-year.

Figure 15 – Global Schedule Reliability and Alliance East/West Schedule Reliability



Source: Sea Intelligence

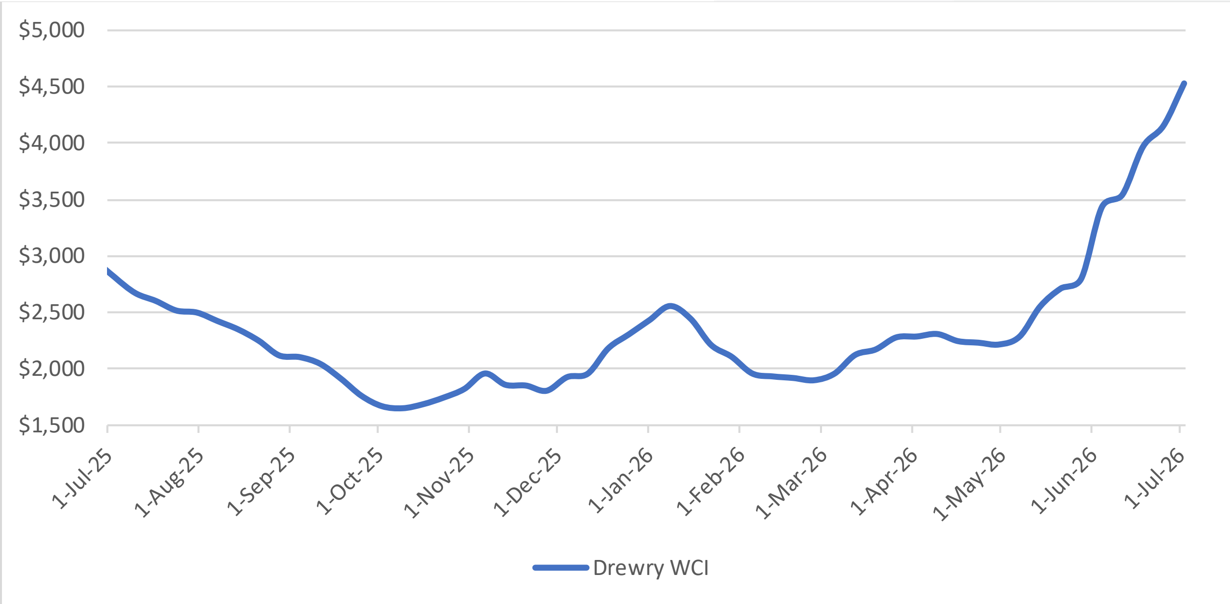
Among the top 13 carriers, Maersk ranked highest at **78.2%**, followed by Hapag-Lloyd at **76.0%** and MSC at **71.6%**, while Wan Hai was lowest at **38.0%**. Nine carriers improved month-on-month.

iii. Container freight rates and container industry summary

Drewry's latest "*World Container Index*" (WCI) assessment reports that spot container rates continued their upward climb, with the composite index rising **↑9%** (w/w) **to $4,530/40ft**, driven mainly by increases on the

Transpacific and Asia–Europe trades. The latest surge means that freight rates have now approximately doubled in two months:

Figure 16 – World Container Index ($/FEU)



Source: Calculated from [Drewry]

Transpacific rates strengthened sharply, with Shanghai–New York up ↑**11%** to **$7,902/40ft** and Shanghai–Los Angeles up ↑**10%** to **$6,349/40ft**, supported by tight capacity and announced blank sailings. Asia–Europe also firmed, with Shanghai–Genoa up ↑**10%** to **$6,360/40ft** and Shanghai–Rotterdam up ↑**7%** to **$4,682/40ft**. At the same time, Drewry expects further increases in the coming weeks amid peak-season demand, GRIs/PSS, and persistent geopolitical uncertainty.

b. Global air cargo industry

The latest weekly data from WorldACD show that global air cargo remained tight in the week of 15–21 June 2026, with worldwide rates edging up ↑**1%** to **$3.24/kg** and staying about ↑**35%** above last year, while spot rates rose ↑**1%** to **$3.75/kg**. Capacity was broadly stable to slightly higher worldwide.

Figure 17 – 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%	+3%		+3%	+3%		-1%	+35%
Asia Pacific		+1%	+6%		+2%	+10%		+1%	+36%
C. & S. America		+1%	+4%		-4%	+3%		-1%	+11%
Europe		+2%	+2%		+7%	+6%		-0%	+31%
M. East & S. Asia		+5%	-2%		+13%	+16%		-2%	+49%
North America		+1%	+0%		+10%	+8%		-1%	+24%
Worldwide		+2%	+2%		+4%	+9%		-0%	+34%

Source: [World ACD]

The Middle East & South Asia saw the biggest year-on-year rate increase and a strong recovery in capacity after the easing of tensions between Iran and the US. Asia Pacific also remained firm, with rates and spot rates far above last year's levels, while Europe, Africa, and North America were comparatively steadier. Even as capacity returned to Gulf-related lanes, especially to Europe and North America, rates stayed elevated because demand, belly hold constraints, and risk surcharges continued to support pricing. Jet fuel prices eased further, which may have helped later, but high rates and cautious capacity rebuilding still characterised the market in late June.

In other aviation news, FIATA has sought urgent clarification from airlines on whether and how they intend to implement expedited amendments to the IATA Direct Air Waybill framework from 1 July 2026, after FIATA argued that the formal review process had not been completed before the effective date.[10] FIATA requested postponement to 1 October 2026, citing unresolved legal, operational, contractual, liability and insurance implications for freight forwarders, and warned that implementation may differ by airline. Although not all airlines will implement the changes immediately, the framework is intended to change the contractual relationship between airlines, shippers, and freight forwarders, potentially making forwarders responsible for obligations traditionally borne by the shipper.[11]

Lastly, on July 1, 2026, the European Union abolished its **€150 de minimis duty exemption**. In its place, the EU introduced a temporary, flat **€3 customs duty per individual item** (based on tariff classification) for low-value consignments. This transitional measure impacts all B2C distance sales and will remain in effect until the EU Customs Data Hub is fully operational in 2028.[12]

ENDS[13]

[10] FIATA. 30/06/2026. FIATA seeks urgent clarification from airlines ahead of expedited implementation of IATA Direct Air Waybill changes.
[11] Goldstone, C. 01/07/2026. 'Bizarre' direct air waybill revamp a 'game-changer' for forwarders.
[12] Whiteman, A. 01/07/2026. Ready or not, it's the end of de minimis in the EU.
[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.*