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Cargo Movement Update #289[1]

Date: 5 July 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)	28,574	32,554	**61,128**	28,383	32,336	**60,719**	**↑1%**
Air Cargo (tons)	3,709	2,372	**6,081**	4,730	2,950	**7,680**	**↓21%**

Monthly Snapshot

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

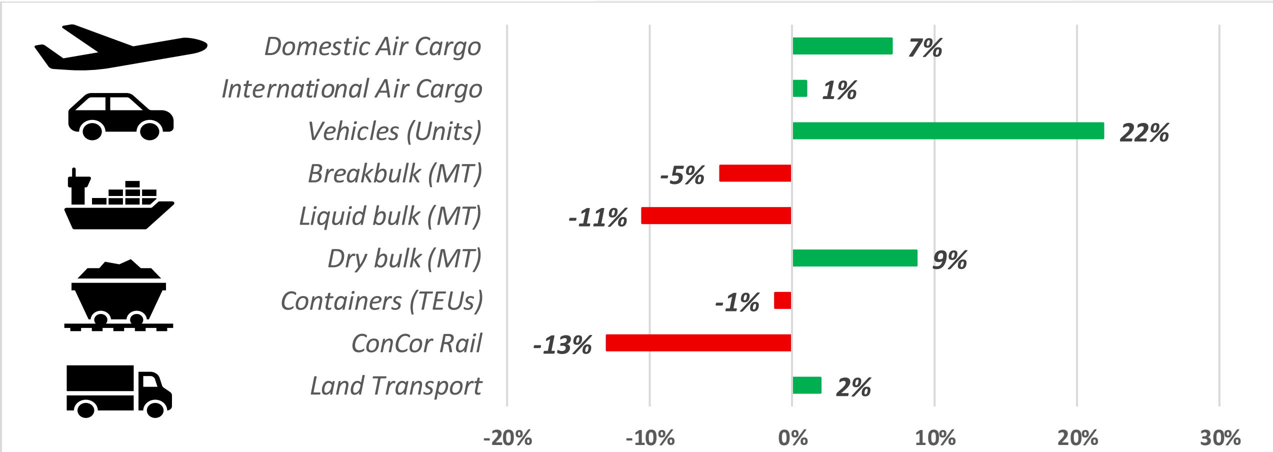
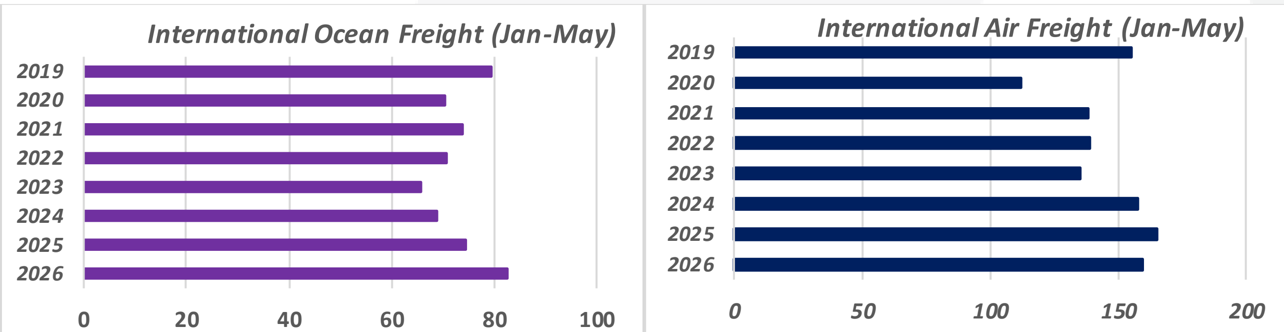


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **8,733 TEUs** was handled per day, with **7,912 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2,295** containers, down by **↓12%** from last week.
- Cross-border queue: **↓1.6 hrs**; transit: **↓2 hrs**; SA borders: **~9.7 hrs** (**↑1%**); SADC: **~6.7 hrs** (**↓25%**).
- IMF projects global growth at **↑3%** for '26 & **↑3.4%** for '27 amid renewed conflict & financial market repricing.
- Global container throughput reached a record **17.35 million TEUs** in May, with volume up by **↑6.2%** (m/m).
- Global air cargo demand strengthened further, with CTKs up **↑6.0%** (y/y) and international traffic up **↑6.5%**.

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[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *289th* 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 **8,733 TEUs** was handled daily, an increase from **8,674 TEUs** the previous week.

Port operations were mixed across the port system throughout the week, with weather disruptions and system- and power-related challenges significantly impacting operations. In the Western Cape, the container terminal and MPT reported a significant increase in waterside volumes, though FPT/AGL reported significant weather delays. In Durban, DGT had an increase in waterside volumes along with reports of congestion on the port and landside. At the same time, all container terminals were affected by poor weather conditions towards the end of the week. In the Eastern Cape, both NCT and PECT recorded lower vessel turnaround times, though waterside volumes were down, likely aggravated by power failures and poor weather conditions.

The IMF's July outlook projects global growth of **↑3.0%** in 2026 and **↑3.4%** in 2027, broadly unchanged from April, but with divergent drivers across regions. Conflict-related energy shocks are weighing on energy importers and vulnerable economies, while AI-linked demand is supporting countries integrated into global technology value chains. Disinflation has stalled, and downside risks remain from renewed conflict and possible financial-market repricing. South Africa's outlook remains weak, with IMF growth projections of *only* **↑1.1%** in 2026 and **↑1.3%** in 2027.

Global shipping continues to reflect strong underlying cargo demand despite persistent operational strain. Container port throughput reached a record **17.35 million TEUs** in May, up **↑6.2%** (m/m), indicating that current congestion and schedule disruption are being driven less by weak demand than by the system's difficulty absorbing elevated flows. The dry/reefer price index increased **↑6.7%** (m/m) to **95 index points**, with exports rising strongly from the Far East (**↑8%**) and SSA (**↑6.6%**), while imports into SSA increased **↑11%**. Fleet capacity also expanded: CMA CGM added **235,500 TEU** in H1 2026, ahead of MSC's **205,000 TEU**, taking CMA CGM to **4.39 million TEU** versus Maersk's **4.73 million TEU**. However, the Hormuz escalation has lifted oil and war-risk insurance exposure, despite no verified closure of the Strait and signs of limited Suez normalisation via Maersk's AE15 service.

After three consecutive weeks of growth, international air cargo to ORTIA subsided this week. The daily average amounted to **~530,000 kg** inbound (**↓22%**, w/w) and **~339,000 kg** outbound (**↓20%**). Current volumes to and from ORTIA still remain slightly above the commensurate volumes of July last year (**↑2%**) and also above the pre-pandemic July of 2019 (**↑2%**). For the month of June, international volume at ORTIA comes in at **↓3%** (m/m) and **↓9%** (y/y).

IATA's May figures point to continued air cargo expansion, with global CTKs up **↑6%** year-on-year and international traffic up **↑6.5%**, led mainly by Asia Pacific and North American carriers while Middle East disruption continued to weigh on the market. Capacity growth remained slower than demand at **↑1.9%**, lifting load factors to **46%**, while firm utilisation and still-elevated fuel costs kept yields **↑38%** above year-earlier levels. High-frequency data from World ACD show that international air cargo demand remained resilient in June, with global tonnages **↑9%** (y/y) and H1 volumes **↑5%**, supported by broad-based regional growth despite ongoing Middle East-related disruption. Rates remained elevated, with spot prices **↑43%** (y/y), although late-June tonnages and rates softened slightly and capacity continued to normalise.

On the N4 corridor, movements increased by around **20 trucks**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**). Truck volumes through the border post increased to **1,510 HGVs per day**

(↑**1.3%**, w/w). Overall, queue times increased marginally to an average of **~5 hours** (↑**19%**, w/w) at the border. The average processing times also increased marginally – to an average of **~4.6 hours** (↑**12%**) per crossing.

Weekly land border crossing figures in the SADC region show that the average queue time decreased by slightly more than **an hour and a half** from last week, as transit time also decreased – by **two hours**. The median border crossing times at South African borders were approximately stable, averaging **~9.7 hrs** (↑**1%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) decreased by more than **two hours**, averaging **~6.7 hrs** (↓**25%**). This week, on average, **two** SADC borders again took more than a day to cross, namely Beitbridge and Kasumbalesa (the worst affected, taking around **four days** to cross from the **Zambian side**).

Cross-border developments this week include **(1)** elevated traffic volumes at Beitbridge, partly due to transporters moving consignments ahead of possible protest action; **(2)** the release of Zambia's ZRA Customs Inward Report / CE 1 form for all inbound and transit cargo, with ACI submissions to be made via email; and **(3)** growing transporter concern around calls to bar foreign drivers from South African-registered vehicles, including the potential knock-on risk to South African drivers, vehicles, and cargo operating north of the Limpopo.

Finally, reform momentum in South Africa's freight logistics system continues to build. Speaking at the Africa Convention this week, Transport Minister Barbara Creecy noted that the rail reform programme has moved "*beyond planning and policy formulation to implementation*", with institutions established, tariffs published, the first private train operators named, major port concessions reaching financial close, and the National Rail Master Plan setting out a longer-term pathway towards a modern, resilient and competitive rail network capable of serving future market demand of up to **280 million tonnes beyond 2030**.[6]

This progress is welcome and important. However, the next phase must ensure that reform remains structural, and not merely operational. Operational recovery – typified by **(1)** higher volumes, **(2)** better asset availability and **(3)** improved daily execution – will only be sustained if the underlying architecture of the system changes, including: **(1)** credible open access, **(2)** independent regulation, **(3)** transparent tariffs, **(4)** bankable private-sector participation, **(5)** protected infrastructure investment and **(6)** clear separation between infrastructure management and train operations. The priority now is therefore to accelerate implementation so that the reform programme moves from policy architecture to practical market confidence, enabling private capital, operational capability and customer demand to return to the rail system at scale.

[6] Creecy, B. 07/07/2026. Minister of Transport Barbara Creecy Keynote Address.

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 29 June to 5 July (measured in TEUs)

7-day flow reported (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)	2,192	15,346	↓7%
Cape Town Container Terminal	2,968	20,773	↑45%
Ngqura Container Terminal	2,433	17,033	↓15%
Port Elizabeth Container Terminal	729	5,106	↓14%
Other	410	2,870	↓26%
Total	**8,733**	**61,128**	↑1%

Source: Calculated from TPT, 2026. Updated 05/07/2026.

An average of **~8,733 TEUs** (↑1%) was handled per day for the last week (*29 June to 5 July, **Error! Reference source not found.***). Consequently, throughput was above the projected average of **~7,912 TEUs** (↑10% actual versus projected). For the coming week, a decreased average of **~7,912 TEUs** (↓9%) is predicted to be handled (*6 to 12 July*, **Error! Reference source not found.**).

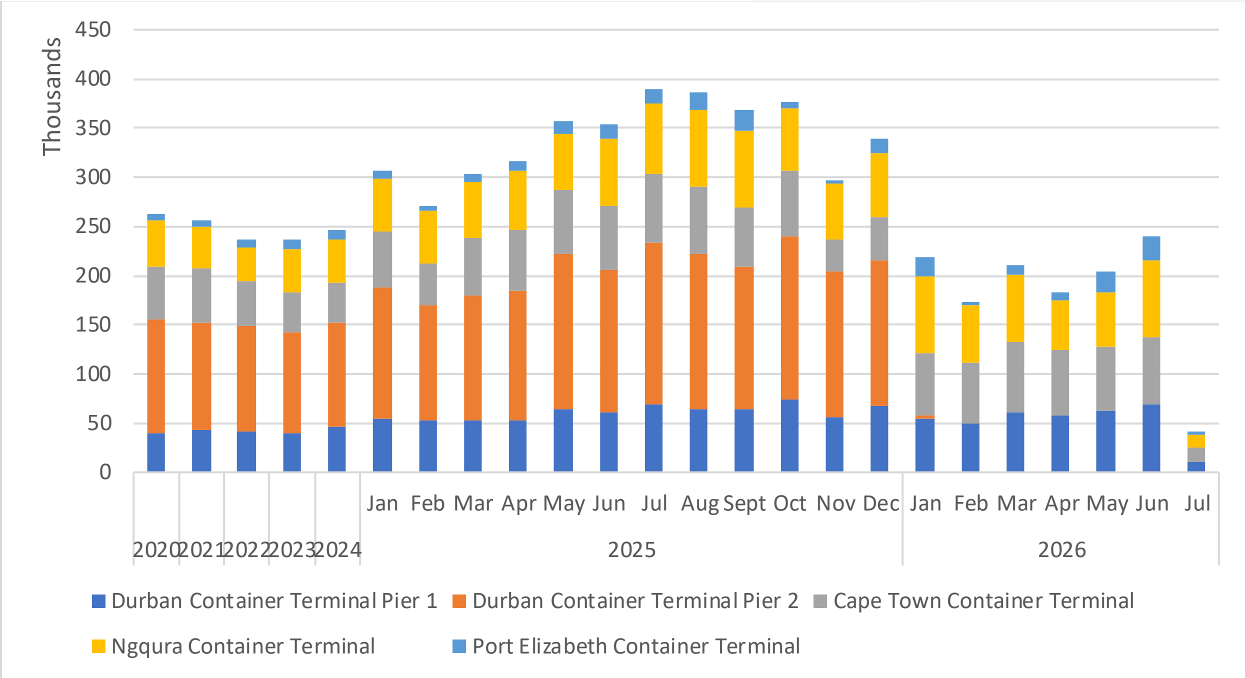
Table 3 – Container Ports – Weekly flow projected for 6 to 12 July (measured in TEUs)

7-day flow projected (06/07/2026 – 12/07/2026)			
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	↓9%
Cape Town Container Terminal	2,257	15,801	↓24%
Ngqura Container Terminal	2,341	16,387	↓4%
Port Elizabeth Container Terminal	448	3,138	↓39%
Other	866	6,062	↑111%
Total	**7,912**	**55,387**	↓9%

Source: Calculated from TPT, 2026. Updated 05/07/2026.

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 05/07/2026.

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:

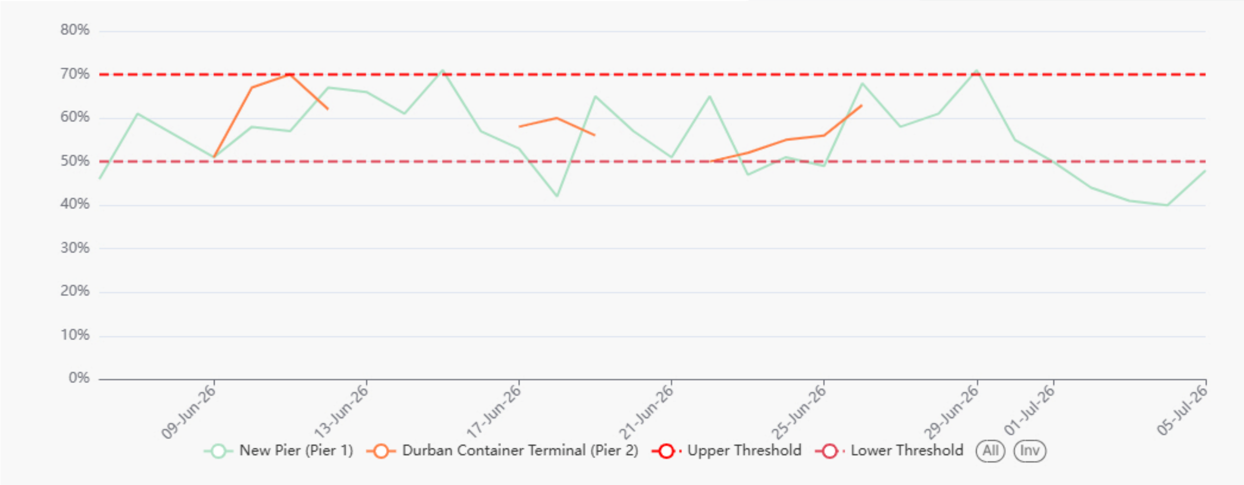
Table 4 – Vessel Dwell Time

Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.5	2.3
Cape Town	FPT	0.8	3
Cape Town	MPT	1.6	1.3
Durban	Pier 2	1.3	3.5
Durban	Pier 1	0.9	1.9
East London	MPT	0.2	3.1
Ngqura	NCT	2.4	2.6
Port Elizabeth	PECT	4.4	1.3

Source: Calculated from Marine Traffic AIS data, 2026. Updated 07/07/2026.

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

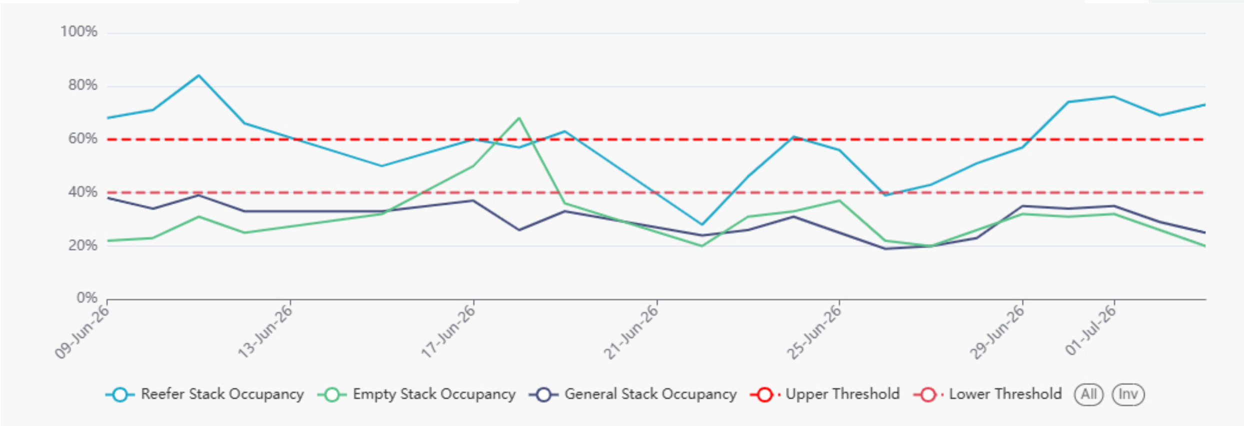
Figure 4 – Stack occupancy in Durban, general-purpose containers (6 June to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 05/07/2026.

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 (9 June to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 05/07/2026.

b. Summary of port operations

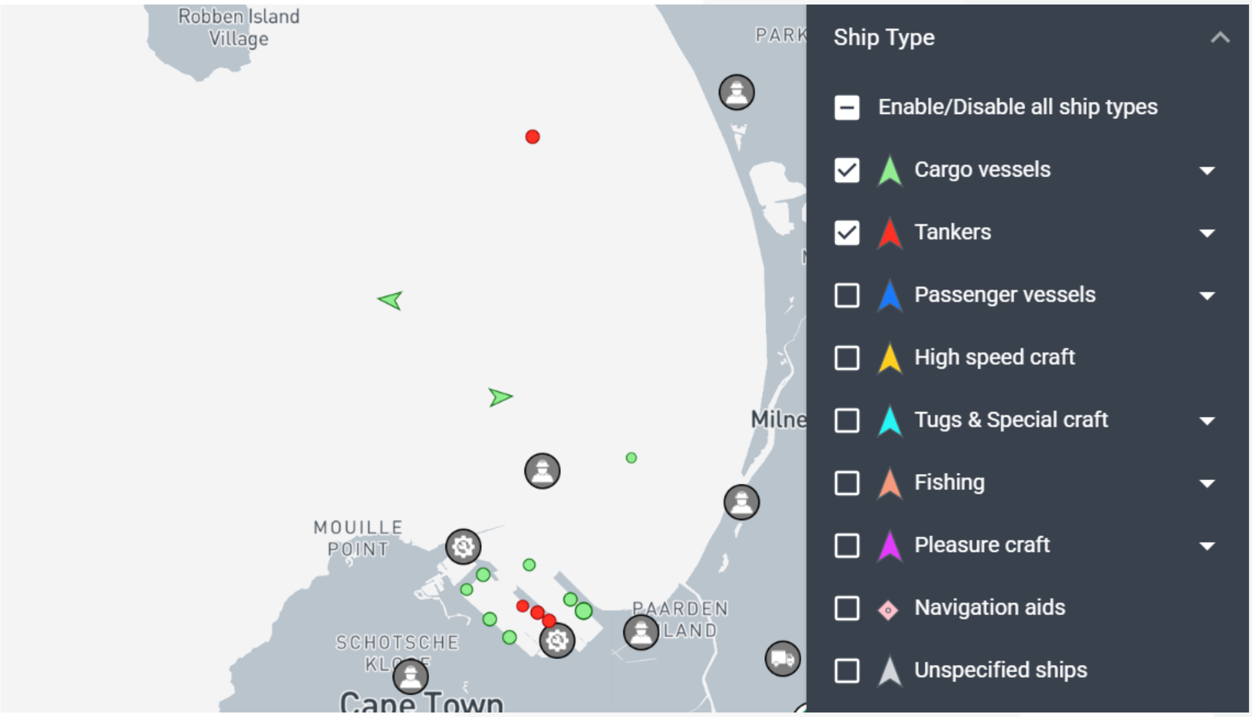
i. Cape Town

Cape Town Container Terminal recorded a significant recovery on the waterside (up by **↑45%**) from the previous week. Vessel turnaround times remained stable, with vessels spending an average of 6 hours at anchorage and 40 hours at berth, with only one vessel waiting at anchorage on average. Equipment availability remained strong, with an average of seven out of nine cranes and 29 out of 32 RTGs available throughout the week.

Cape Town Multi-Purpose Terminal reported a significant increase in waterside volumes, though starting from a low base from the previous week (up from 172 containers last week to 316 containers this week), with activities remaining low. Vessels spent an average of 34 hours at anchorage and 23 hours at berth, with equipment availability consistent at two out of three cranes and three out of five straddle carriers.

For berth A, the AGL Terminal reported that poor weather conditions heavily impacted the container vessel that berthed during the week; the vessel spent very little time at anchorage and spent 75 hours at berth (with 33 hours of weather delays).

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



Source: Marine Traffic. Updated 05/07/2026 at 14:00.

ii. Durban

Pier 1 (New Pier) reported a minor decline in waterside volumes, with a decrease in productivity towards the end of the week. Following a strong start to the week, a power outage on Friday caused significant delays on water and landside, compounded by poor weather conditions on Thursday and Friday. Vessels spent an average of 57 hours at anchorage and 60 hours at berth. Equipment availability remained strong, averaging six out of seven cranes and 23 out of 25 RTGs throughout the week. The **TTT** for the week averaged **~57 minutes** (**↑12%**, w/w), and the average **staging time** was **~33 minutes** (**↓11%**).

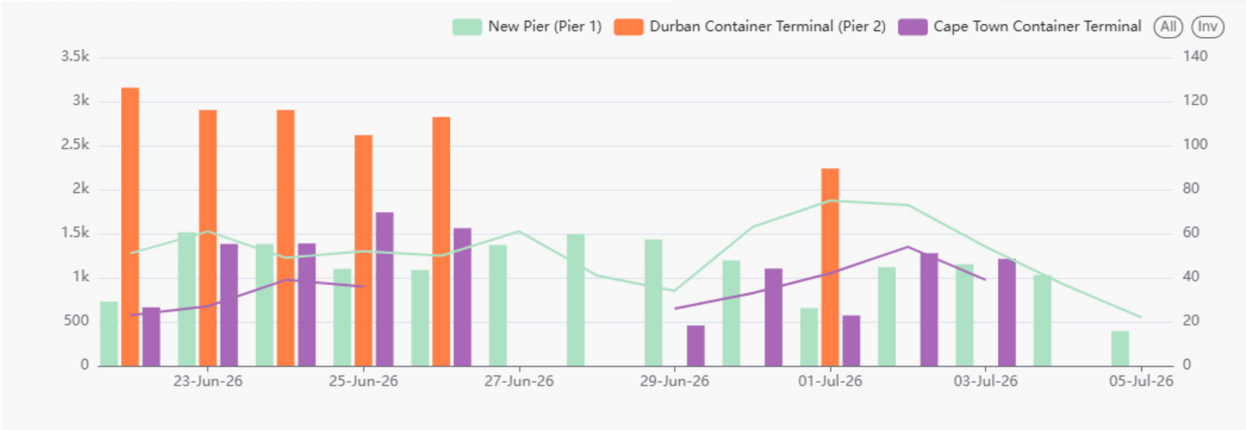
Durban Gateway Terminal recorded a significant increase in waterside volumes, up from a daily average of **2,774 containers** the past week, to **3,871 containers** per day this week (**↑40%**). Vessel waiting times, in contrast, remained extended, spending an average of 47 hours at anchorage and 110 hours at berth. Poor weather conditions towards the end of the week, along with a power outage on Friday, caused further delays. Industry reports indicate significant challenges on the landside. In addition, DGT-related information such as vessel lists, stack dates, etc. has not been updated on the Transnet website, though the information is available on the dedicated DGT-ICTSI website: https://dgt.ictsi.com/terminalupdates.

Overall, DGT reports that year-to-date weekly volumes are up by **↑12%**, while overall truck turnaround times have improved by **↑8%** over the same period. In anticipation of peak-season pressure, the terminal has granted an additional free import storage day for vessels arriving between 1 July and end-August, while booking slots will now be released on a 24-hour basis, with four-hourly reviews to release additional capacity where operationally possible.

Durban Multi-Purpose Terminal reported a 25% decline in waterside volumes, with vessels spending an average of 30 hours at anchorage and 66 hours at berth. Poor weather conditions on Thursday and Friday further affected performance.

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.

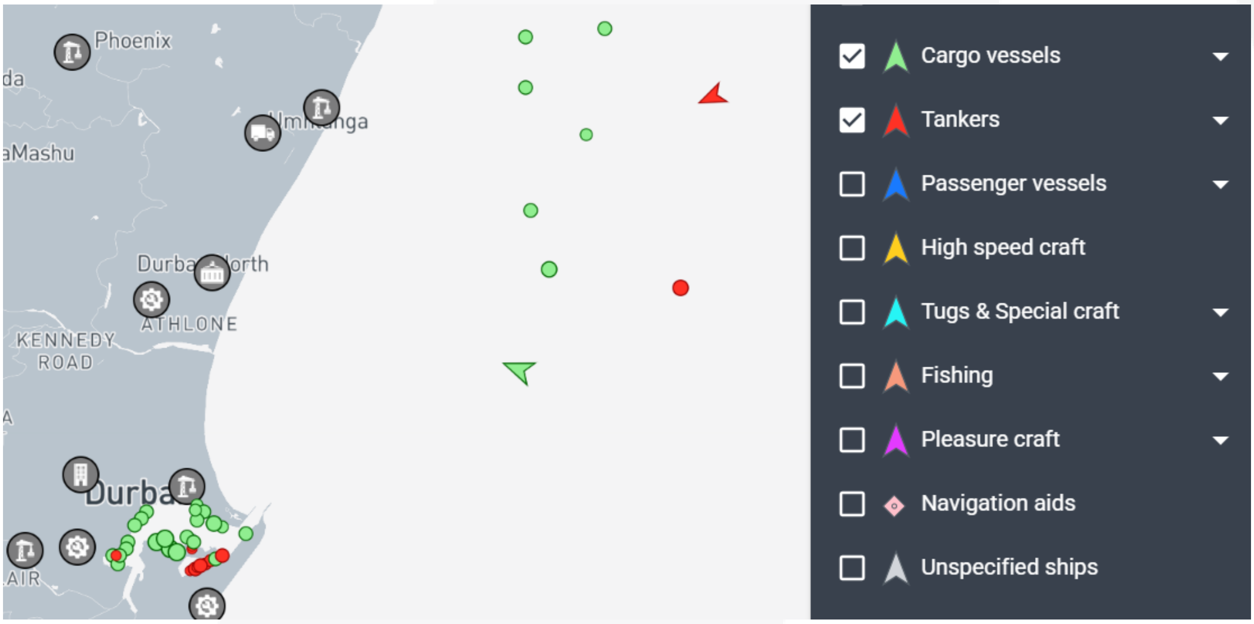
Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 05/07/2026.

The queue of container vessels waiting outside Durban **was again stable** this week. On Wednesday morning (8 July), **four** container vessels were waiting outside at anchorage for Durban, **two** for DGT, **one** for Point, and **one** for Pier 1. The queue of dry (**three**), liquid (**two**), and breakbulk (**four**) **was stable** from last week:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 05/07/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal reported a decline in waterside volumes, with congestion persisting as vessels spend an average of 79 hours at anchorage and 44 hours at berth—a three-hour system failure along with significant weather delays on Thursday and Friday aggravating the situation. Equipment availability remained steady with an average of seven out of eight cranes and 23 out of 30 RTGs available throughout the week.

Port Elizabeth Container Terminal experienced a decline in waterside volumes, aggravated by the system failure. Congestion on the port side has started clearing up with an average time at anchorage of 28 hours (down from 119 hours the previous week) and 44 hours on berth. Equipment availability remained strong with all three cranes and 11 straddle carriers available for most of the week.

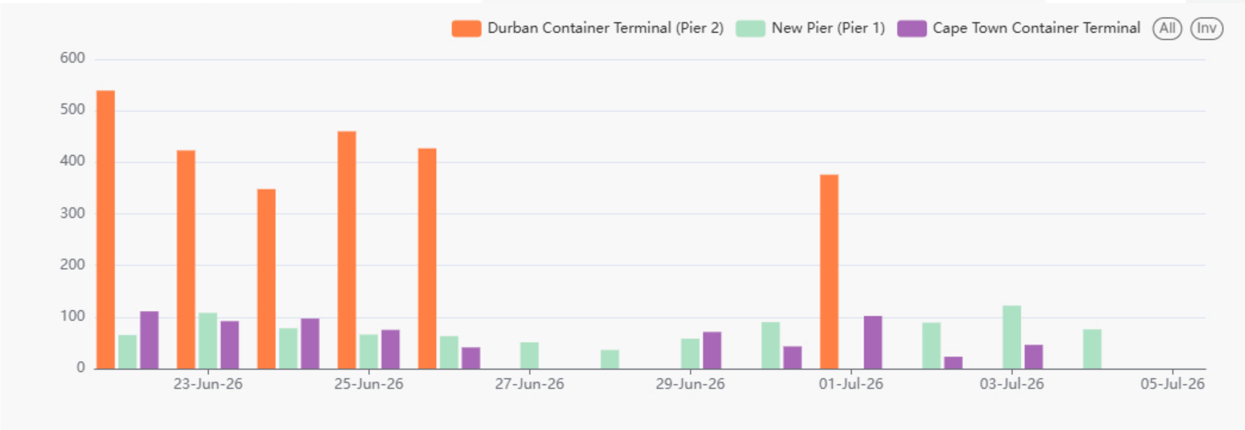
iv. Richards Bay

At RBCT, the daily average coal throughput for the week decreased slightly and averaged roughly **119,946 tons** (**↓6%**, w/w) a day. An average of **23 trains** was serviced on the landside (down from last week's **24**), and **above the target** (**22** trains).

v. Transnet Freight Rail (TFR)

In the last week (*29 June to 5 July*), rail cargo on the ConCor line out of Durban was reported at **2,295** containers, down by **↓12%** 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 05/07/2026.

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 (*29 June to 5 July*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *July 2025* was **~848,687 kg**.

Table 5 – International inbound and outbound cargo from OR Tambo

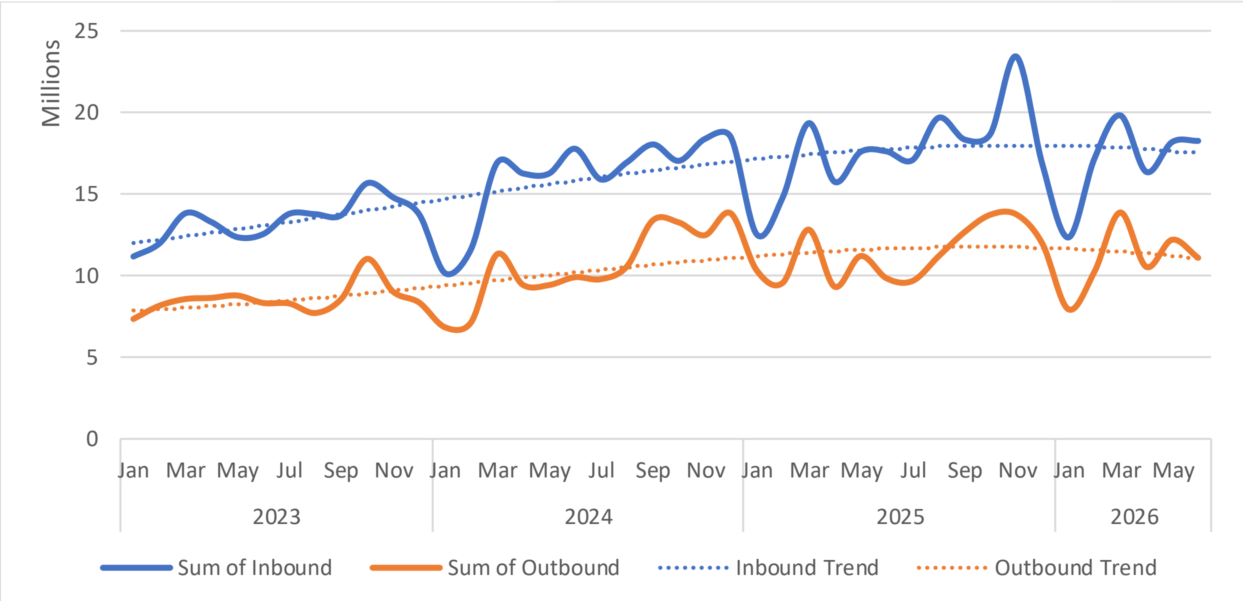
Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**529,909**	**3,709,362**	**↓22%**
Volume outbound	**338,855**	**2,371,987**	**↓20%**
Total	**868,764**	**6,081,349**	**↓21%**

Courtesy of ACOC. Updated: 05/07/2026.

After three consecutive weeks of growth, international air cargo to ORTIA subsided this week. The daily average amounted to **~530,000 kg** inbound (**↓22%**, w/w) and **~339,000 kg** outbound (**↓20%**). Current volumes to and from ORTIA still remain slightly above the commensurate volumes of July last year (**↑2%**) and also above the pre-pandemic July of 2019 (**↑2%**). For the month of June, international volume at ORTIA comes in at **↓3%** (m/m) and **↓9%** (y/y).

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, 8 July) per airport indicate:

- ORTIA: **6.4 days** (target: 5 days)
- CTIA: **4 days** (target: 4 days)
- Durban: **~5.7 days** (target: 5 days)

3. Road and Regional Update

a. Lebombo border post update

In the last week (*29 June to 5 July)*, movements increased by around **20 trucks**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**).

- Truck volumes through the border post increased to **1,510 HGVs per day** (**↑1.3%**, w/w).
- Overall, queue times increased marginally to an average of **~5 hours** (**↑19%**, w/w) at the border.

- The average processing times also increased marginally – to an average of **~4.6 hours** (**↑12%**) per crossing.

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

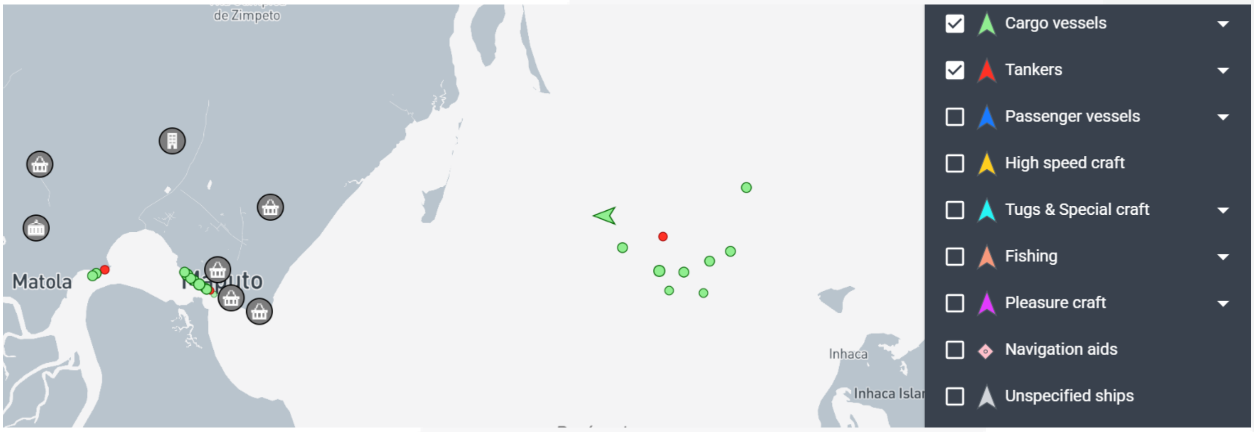
Table 6 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,510	1,500	1,198	185	33	55	29	233
% (w/w)	**1%**	**1%**	**5%**	**5%**	**-33%**	**-19%**	**-19%**	**-9%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 05/07/2026.

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 05/07/2026 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 slightly more than **an hour and a half** from last week, as transit time also decreased – by **two hours**.
- The median border crossing times at South African borders were approximately stable, averaging **~9.7 hrs** (**↑1%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) decreased by more than **two hours**, averaging **~6.7 hrs** (**↓25%**).

1. **Beitbridge experienced elevated traffic volumes during the week:**
    a. Higher-than-normal movements were partly linked to transporters seeking to move consignments before any potential protest action.
2. **ZRA has made the Customs Inward Report / CE 1 form available for inbound cargo:**
    a. The form applies to all cargo entering Zambia, including transit cargo moving through the country.
    b. Completion is the responsibility of the importer, not the transporter, unless the transporter is also the importer.
    c. All Advanced Cargo Information submissions must be sent via email.

3. **Transporters remain concerned about the potential barring of foreign drivers from South African-registered vehicles:**
    a. Many foreign drivers operating cross-border routes do not reside in South Africa and are only in the country temporarily under the 14-day visa-free period to load or offload cargo, often while making use of ZEP-related provisions.
    b. Industry concern is that some activist groups misunderstand the operational realities of regional road freight.
    c. Transporters have also raised concerns that anger linked to the issue may increasingly be directed at South African truck drivers operating north of the Limpopo, increasing the risk of intimidation, cargo damage, or theft.

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	543	24.0	6.3	25.0	16,290	3,801
Beitbridge	Zimbabwe-SA	273	5.5	1.4	5.3	8,190	1,911
Groblersbrug	SA-Botswana	230	17.7	2.3	17.4	6,900	1,610
Martin's Drift	Botswana-SA	148	1.2	0.2	1.1	4,440	1,036
Kopfontein	SA-Botswana	212	9.5	2.2	9.3	6,360	1,484
Tlokweng	Botswana-SA	50	0.7	0.2	0.4	1,500	350
Vioolsdrift	SA-Namibia	30	4.6	1.4	4.4	900	210
Noordoewer	Namibia-SA	20	2.1	0.5	2.1	600	140
Nakop	SA-Namibia	30	4.7	0.6	4.4	900	210
Ariamsvlei	Namibia-SA	20	1.2	0.4	1.1	600	140
Skilpadshek	SA-Botswana	287	9.4	2.2	9.2	8,610	2,009
Pioneer Gate	Botswana-SA	87	1.8	0.6	1.5	2,610	609
Ramatlabama	SA-Botswana	148	3.3	0.5	3.2	4,440	1,036
Ramatlabama	Botswana-SA	64	0.7	0.1	0.4	1,920	448
Lebombo	SA-Mozambique	1,408	5.0	1.4	4.6	42,240	9,856
Ressano Garcia	Mozambique-SA	1,419	2.6	0.3	2.3	42,570	9,933
Sum/Average		**4,969**	**5.9**	**1.3**	**5.7**	**149,070**	**34,783**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 28/06/2026.

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	10.0	2.6	9.8	9,600	2,240
Central Corridor	798	0.4	0.1	1.3	23,940	5,586
Dar Es Salaam Corridor	1,819	20.2	4.8	20.0	54,570	12,733
Maputo Corridor	2,827	3.8	0.9	3.5	84,810	19,789
Nacala Corridor	127	0.0	0.0	0.0	3,810	889

[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.

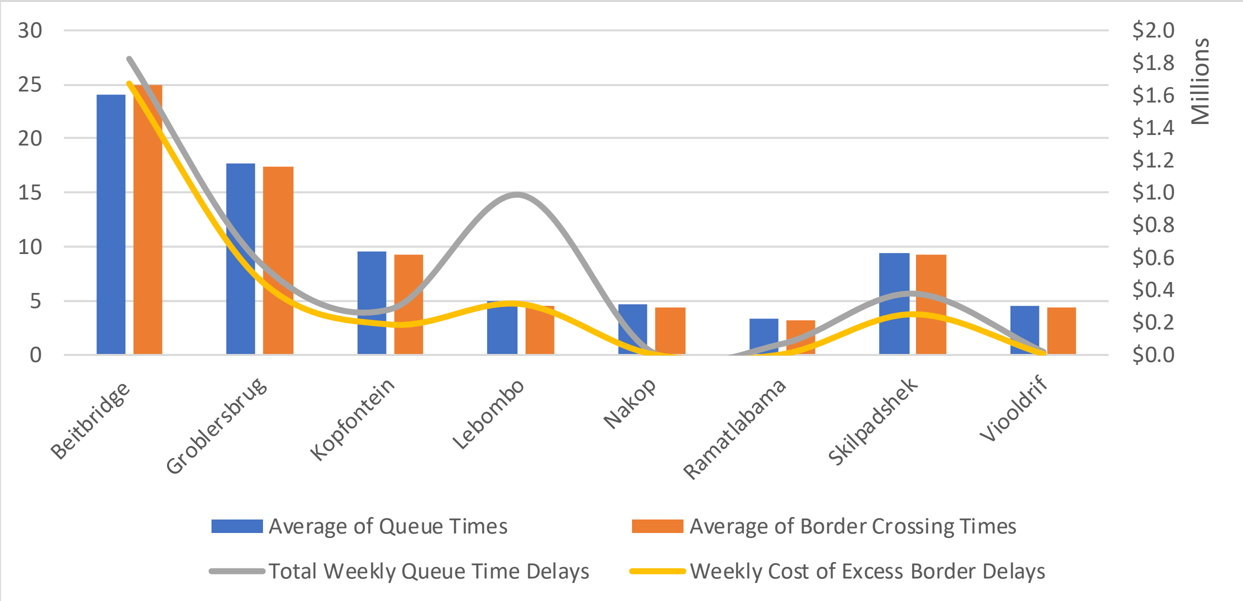
[9] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
North/South Corridor	2,977	16.9	3.5	16.8	89,310	20,839
Northern Corridor	2,817	0.3	0.1	0.3	92,520	21,588
WBNLD Corridor	878	3.9	0.8	3.6	26,340	6,146
Trans Cunene Corridor	100	3.2	0.7	3.0	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	9.4	1.6	9.2	3,480	812
Sum/Average	**12,879**	**7.0**	**1.5**	**7.0**	**394,380**	**92,022**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 28/06/2026.

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

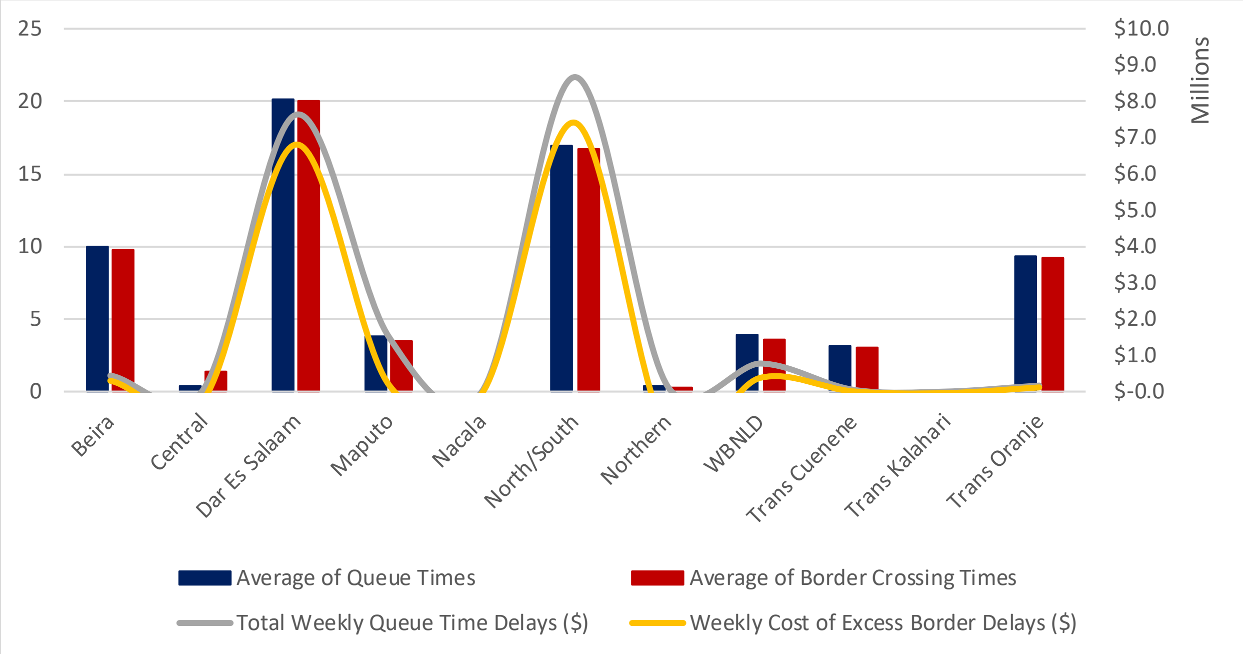
Figure 12 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 28/06/2026.

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 28/06/2026.

In summary, cross-border queue time averaged **~7 hours** (down by **~1.6 hours** from the previous week's **~8.6 hours**), indirectly costing the transport industry an estimated **$19.4 million** (**R315 million**). Furthermore, the week's average cross-border transit times hovered around **~7 hours** (down by **~2.0 hours** from the **~9 hours** recorded in the previous report), at an indirect cost to the transport industry of **$13.7 million** (**R222 million**). The total indirect cost for the week amounts to an estimated **~$33.1 million** (**R537 million**, down by **↓23%** from the **~R699 million** in the previous report).

4. International Update

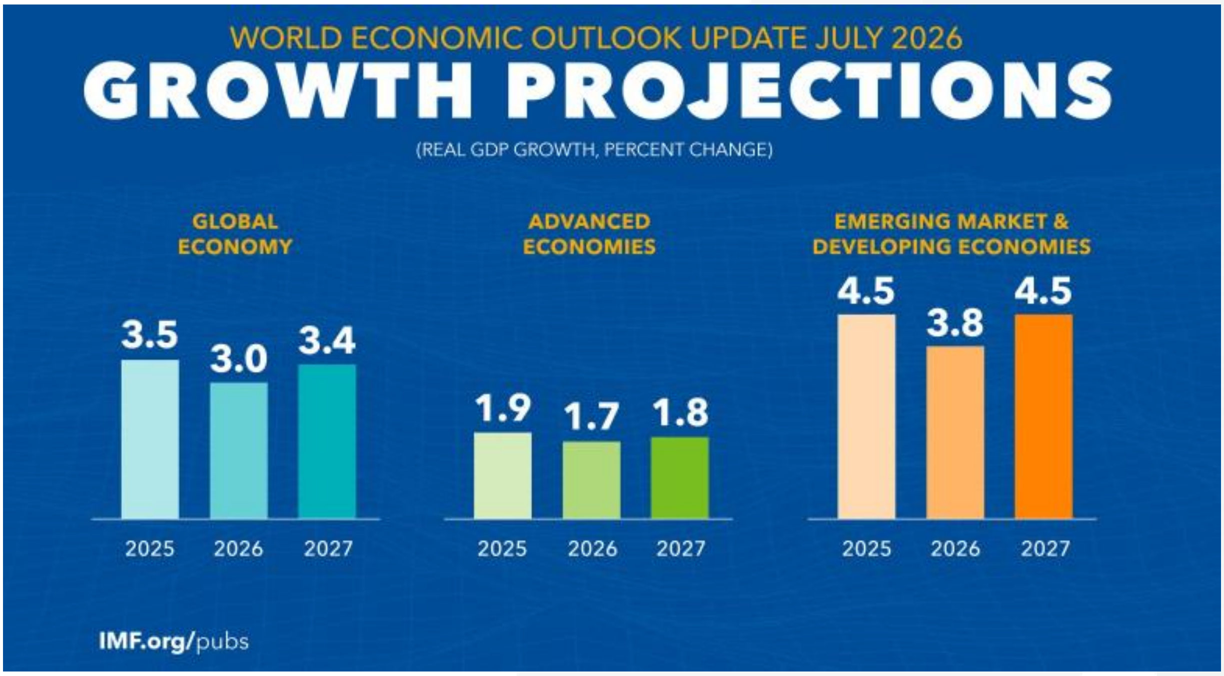
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the world economy, **(b)** the global shipping industry, and **(c)** the global aviation industry.

a. World economic outlook

The IMF released its latest "*World Economic Outlook*" for July, noting that global growth is projected at **↑3%** for 2026 and **↑3.4%** for 2027, broadly unchanged cumulatively from the April 2026 World Economic Outlook. The outlook is uneven: The war shock is weighing on energy importers and vulnerable economies, while AI-driven demand is lifting countries integrated into the global technology value chain.

Global disinflation has stalled. Risks are more balanced than in April, but downside risks from renewed conflict and financial market repricing persist. Policymakers should preserve price stability, rebuild fiscal space, and strengthen adaptability. For South Africa, the IMF predicts growth at **↑1.1%** for 2026 and **↑1.3%** for 2027.

Figure 14 – Global growth projections



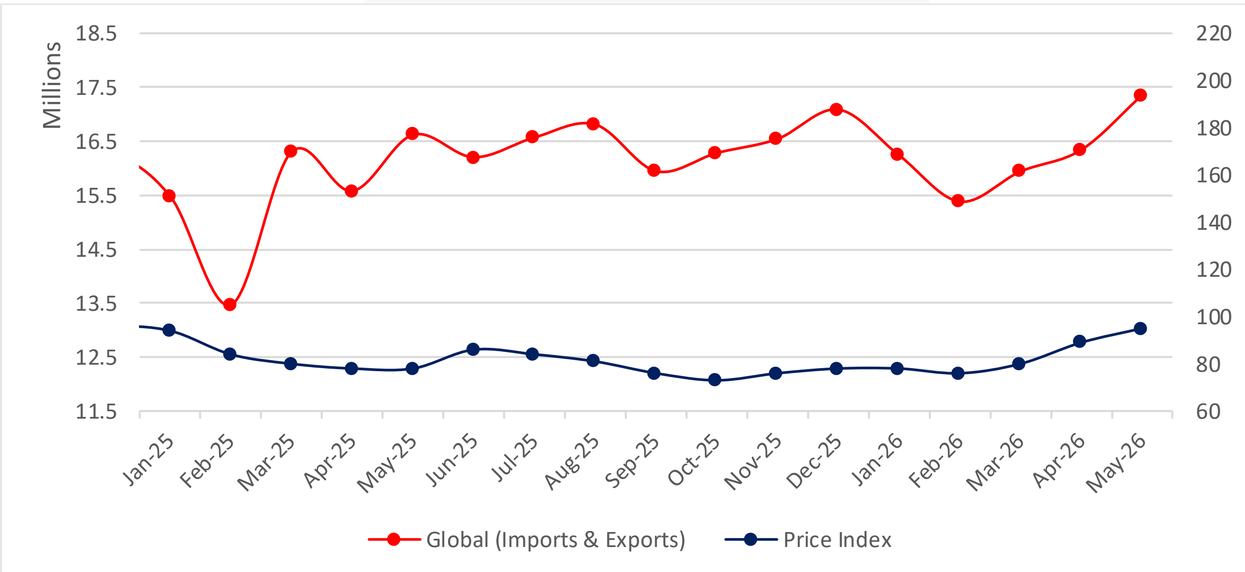
Source: IMF

b. Global shipping industry

i. Global container throughput volume

Global container port throughput reached a record **17.35 million TEUs** in May, highlighting the resilience of underlying cargo demand despite persistent **(1)** congestion, **(2)** schedule disruption, and **(3)** wider supply-chain pressure. The latest data from *Container Trade Statistics* (CTS) – with volume up by **↑6.2%** (m/m) – suggests that current strains are being driven not by weak volumes, but by the system's difficulty in absorbing elevated flows across already-constrained port, vessel, and inland logistics networks.

Figure 15 – Global container throughput volume (TEU, millions)



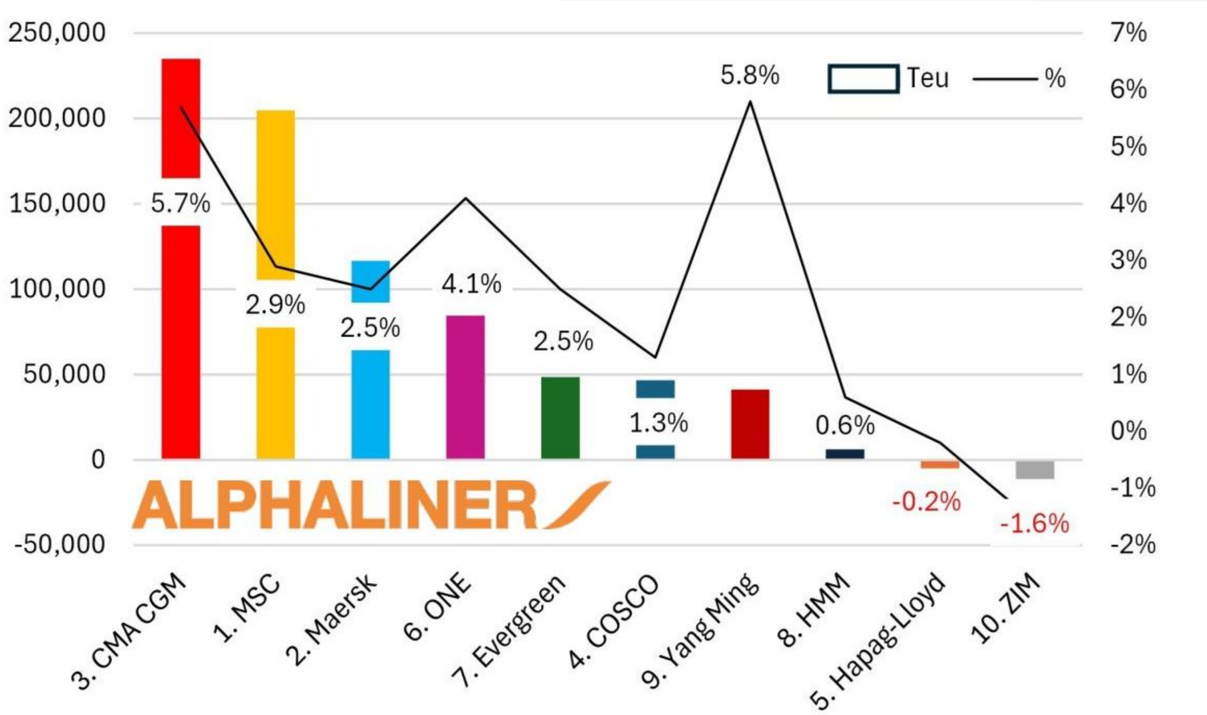
Source: CTS

As expected, the price index (dry and reefer) increased by **↑6.7%** (m/m) to **95 index points**. Regionally, exports surged from the Far East (**↑8%**), followed by SSA (**↑6.6%**) and South & Central America (**↑6%**). Imports increased significantly in the Indian Sub-Continent (**↑17%**), followed by SSA (**↑11%**) and the Far East (**↑8.8%**).

ii. Global container capacity changes

CMA CGM was the fastest-growing top-10 container carrier in the first half of 2026, adding **235,500 TEU** of fleet capacity (**↑5.7%**) and outpacing **MSC's 205,000 TEU** increase. With total capacity now at **4.39 million TEU**, CMA CGM has narrowed the gap to Maersk's **4.73 million TEU** and remains on track to challenge for second place in global liner shipping, supported by a **1.8 million TEU orderbook**. Overall liner fleet capacity grew by **↑2.0%** over the period, while the top-10 carriers expanded by an average of **↑2.7%**.

Figure 16 – Top 10 carriers: capacity changes January vs July 2026

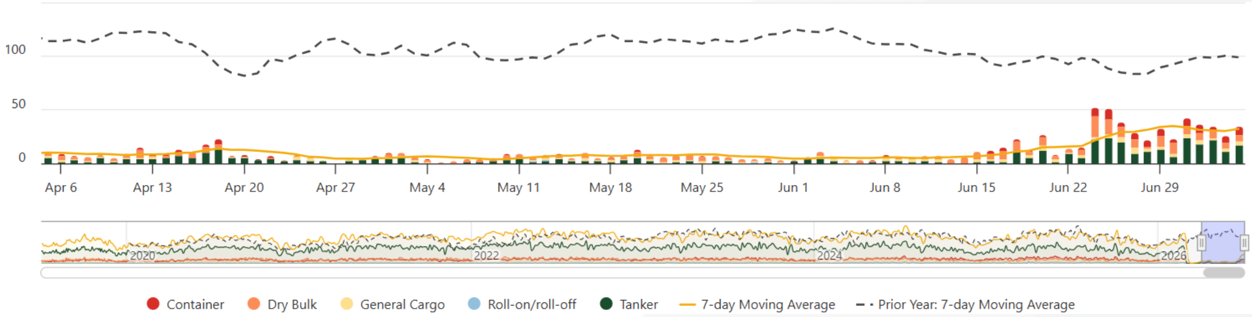


Source: Alphaliner

iii. Strait of Hormuz

The US-Iran conflict has escalated sharply after Washington launched a new round of strikes on Iranian military targets following attacks on three commercial vessels transiting the Strait of Hormuz. The strikes reportedly hit coastal radar, anti-ship missile sites, command-and-control infrastructure and IRGC fast boats. At the same time, the US also revoked the temporary waiver permitting Iranian oil exports, tightening sanctions pressure. Iran has condemned the action and threatened retaliation, raising the risk of further military activity around Hormuz. Oil prices have moved higher, and insurers are likely to maintain or raise war-risk premiums. However, there is no verified evidence that Hormuz has been closed or that regional oil exports have stopped. Nevertheless, the number of vessel transits remains significantly constrained – if not idle:

Figure 17 – Strait of Hormuz: Arrivals of ships



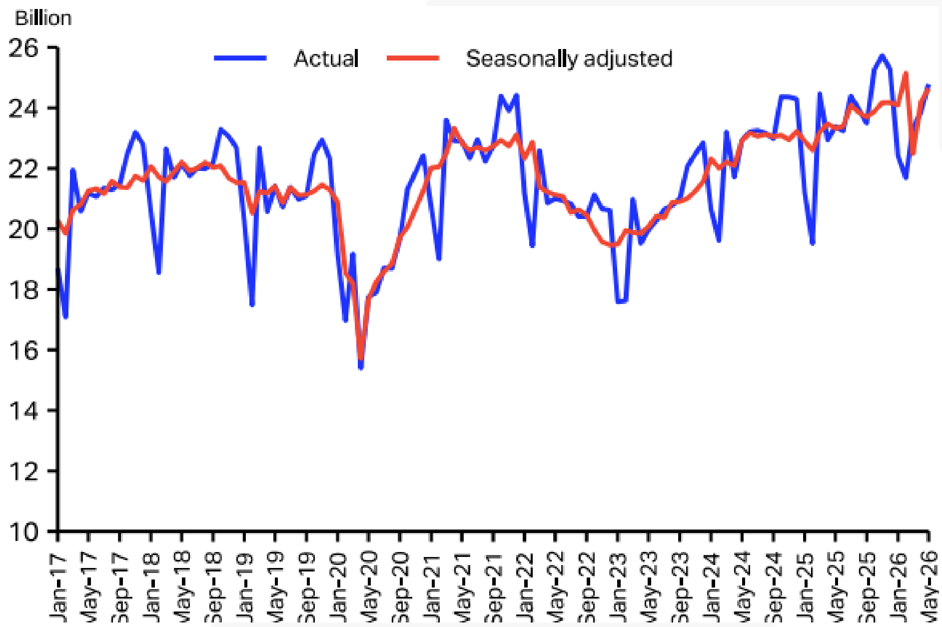
Source: IMF/Oxford Port Watch

Elsewhere, Maersk (through the Gemini Alliance) has announced that the carriers have pushed the AE15 service back through the Suez Canal, suggesting a broader opening may be nearing.[10]

c. Global air cargo industry

For May, IATA's latest "*Air Cargo Market Analysis*" indicates that global air cargo demand strengthened further, with CTKs up **↑6.0%** year-on-year and international traffic up **↑6.5%**. Capacity also expanded, but more slowly, with ACTKs up **↑1.9%** globally and **↑2.8%** internationally, lifting the global cargo load factor by **↑1.8%** to **46.3%**. Growth was led by Africa (**↑13.3%**), North America (**↑10.5%**), Asia Pacific (**↑8%**) and Europe (**↑6.7%**), while the Middle East remained the main drag, with CTKs down **↓8.9%** as hub disruption continued. Freighter traffic was particularly strong, expanding by **↑11%** year-on-year. Although jet fuel prices softened month-on-month, they remained **↑94%** above year-earlier levels, while cargo yields increased by **↑38%** year-on-year.

Figure 18 – Industry CTK (billions)

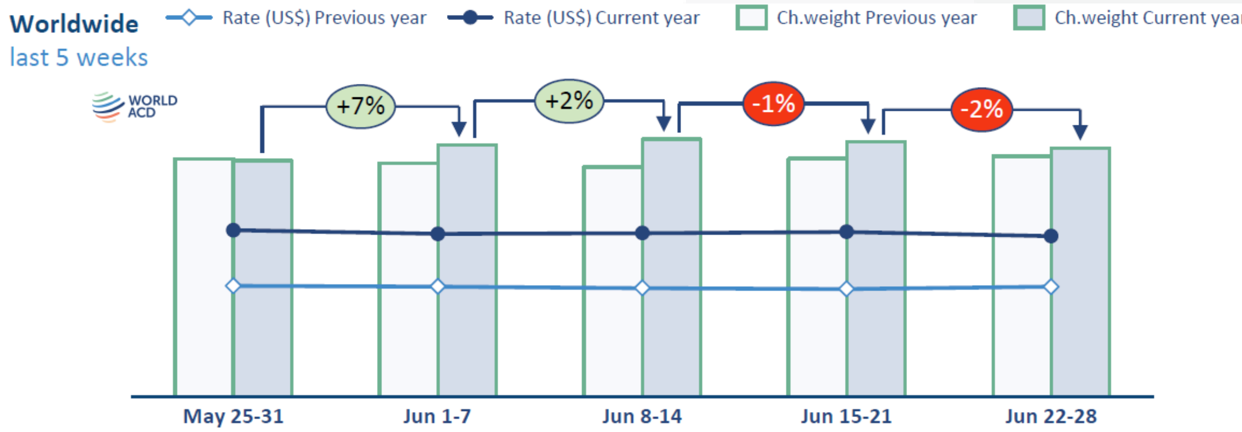


Source: IATA

[10] Whiteman, A. 06/07/2026. Bad news, congestion at Jeddah; good news, Maersk service returns to Suez.

The latest weekly data from WorldACD show that global air cargo demand remained resilient in June, with tonnages ↑**9%** year-on-year and H1 volumes ↑**5%**, despite continuing Middle East-related capacity disruption. Growth was broad-based, led by MESA (↑**11%**), Asia Pacific (↑**10%**) and North America (↑**9%**), while Africa was comparatively subdued at ↑**1%**.

Figure 19 – Chargeable weight and rates (past five weeks)



	May 25-31	Jun 1-7	Jun 8-14	Jun 15-21	Jun 22-28
Current year	$3.28	$3.22	$3.23	$3.25	$3.19
Previous year	$2.45	$2.44	$2.41	$2.40	$2.43

Source: WorldACD

Pricing conditions remained firm: full-market rates were↑**33%** (y/y) in June/Q2, and spot rates averaged **$3.71/kg**, ↑**43%** (y/y). However, the final full week of June showed modest cooling, with both tonnages and rates down ↓**2%** (w/w). Capacity continued normalising, rising ↑**3%** (2w/2w), supported by MESA recovery.

ENDS[11]

[11]***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.*