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Cargo Movement Update #290[1]

Date: 12 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)	29,024	33,067	**62,091**	28,574	32,554	**61,128**	**↑2%**
Air Cargo (tons)	4,201	3,508	**7,709**	3,709	2,372	**6,081**	**↑27%**

Monthly Snapshot

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

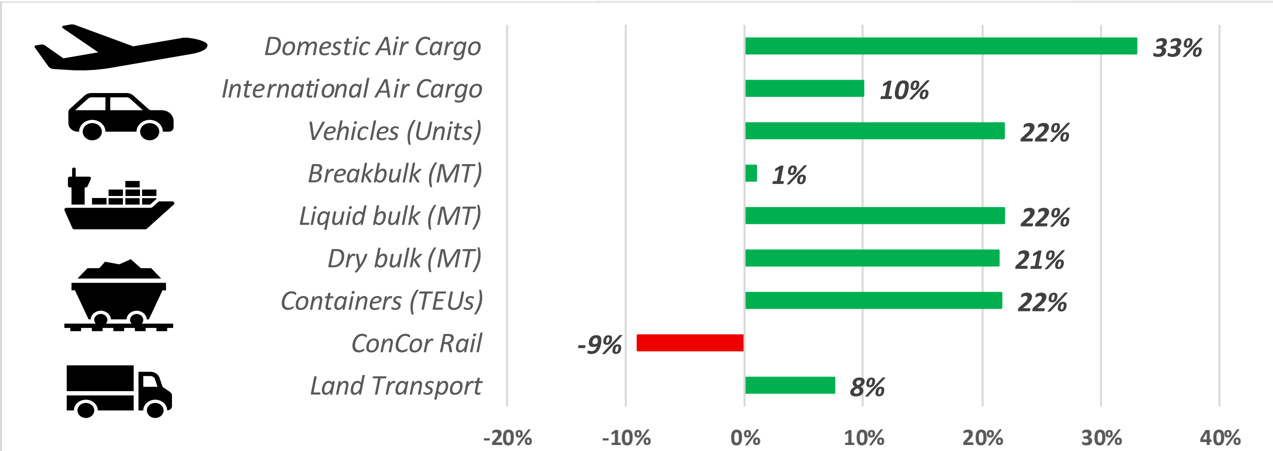
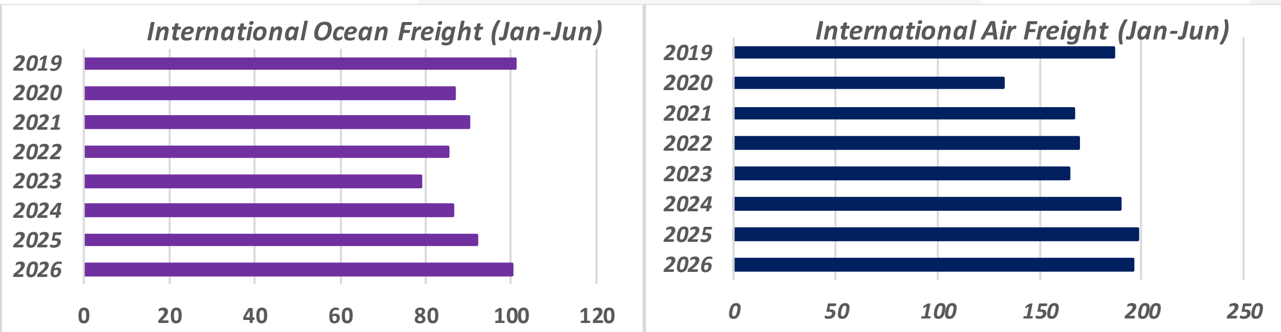


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **8,870 TEUs** was handled per day, with **7,912 TEUs** projected for next week.
- TNPA June: TEUs: **↑33%** (m/m) & **↑22%** (y/y). Bulk: **↑9%** & **↑3%.** Vehicles: **↑40%** & **↑24%** (y/y).
- Rail cargo handled out of Durban was reported at **2,183** containers, down by **↓5%** from last week.
- Cross-border queue: **↑0.3 hrs**; transit: **↑0.1 hrs**; SA borders: **~8.8 hrs** (**↓10%**); SADC: **~6.9 hrs** (**↑3%**).
- Container spot rates have reached a two-year high, as the *WCI* increased by **↑2.4%** to **$4,639/40"**.
- Global air cargo volumes are down by **↓2%**, as average worldwide rates fell by **↓1%** (w/w) to **$3.13/kg**.

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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 *290th* 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: June vs. June.
[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 **8,870 TEUs** was handled daily, an increase from **8,733 TEUs** the previous week.

Port operations showed an improvement in waterside operations for the Eastern Cape, with both NCT and PECT recording a strong week, in spite of weather and equipment delays. In contrast, the Western Cape reported a slow week across all three container handling terminals. In KwaZulu-Natal, the Durban Multi-Purpose Terminal reported a minor increase and a steady week for Pier 1, while operations at DGT were increasingly strained over the past week.

Global shipping developments this week were dominated by **(1)** continued disruption in the Middle East, **(2)** structural changes to liner networks, and **(3)** firmer freight rates. Shipping through the Strait of Hormuz remained severely constrained following renewed US-Iran hostilities, driving Middle East container rates above pandemic-era highs as carriers suspended services, rerouted vessels and imposed additional risk surcharges.

Meanwhile, *Sea-Intelligence* reported that global liner networks have entered a structural phase of lower service density, with carriers maintaining network reach while reducing port call frequency and relying more heavily on transhipment hubs. Container freight markets strengthened further, with Drewry's *World Container Index* (WCI) increasing by **2.4%** week-on-week to **US$4,639 per 40-foot container**, its highest level in approximately **two years**, with expectations that rates will remain firm in the near term.

International air cargo to ORTIA rebounded significantly this week – led by outbound cargoes. The daily average amounted to **~600,000 kg** inbound (**↑13%**, w/w) and **~501,000 kg** outbound (**↑48%**). Current volumes to and from ORTIA are significantly above the commensurate volumes of July last year (**↑30%**) and also above the pre-pandemic July of 2019 (**↑30%**).

For the full month of June, international air cargo volumes showed a slight increase across the board. Johannesburg increased by **↑2%** (m/m) versus May and is up by **↑9%** (y/y) versus 2025. Cape Town increased by **↑8%** (m/m) and by **↑13%** (y/y) versus 2025. Durban increased by **↑25%** (m/m) but remains down by **↓9%** (y/y). Consequently, total international air cargo for June 2026 is up by **↑3%** (m/m) and up by **↑10%** versus 2025. Despite the rebound, the year-to-date cargoes remain down by **↓1.2%** (y/y), mainly because of the Gulf disruptions.

For June, domestic volumes handled at our three main terminals mostly decreased month-on-month – but remain up versus the same time last year. Johannesburg decreased by **↓17%** (m/m) versus May but is up by **↑8%** (y/y) versus 2025. Cape Town increased by **↑5%** (m/m) and is up by **↑32%** (y/y) versus 2025. Durban decreased by **↓9%** (m/m), but is up by **↑13%** (y/y) versus 2025. Consequently, total monthly domestic air cargo for June is down by **↓10%** (m/m) but is up by **↑33%** (y/y) versus 2025.

International air cargo markets softened during the week, with average worldwide rates falling **↓1%** to **$3.13/kg**, spot rates declining **↓2%** to **$3.62/kg**, and global cargo volumes decreasing **↓2%**, largely reflecting the US Independence Day holiday and weaker Hong Kong–Europe traffic following changes to the EU's de minimis import rules. Despite the weekly slowdown, worldwide chargeable weight remains **↑4%** higher year-on-year, while renewed tensions in the Middle East could disrupt capacity and place renewed upward pressure on air freight rates in the coming weeks.

On the N4 corridor, movements increased by around **30 trucks a day**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**). Truck volumes through the border post increased to **1,539 HGVs per**

day (↑**2%**, w/w). Overall, queue times decreased to an average of **~3.6 hours** (↓**28%**, w/w) at the border. The average processing times also decreased – to an average of **~3.4 hours** (↓**26%**) per crossing.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts decreased by ↓**2.6%** (m/m). Northbound traffic (Eastbound for Lebombo) was mixed, with only **Kopfontein** increasing, and a substantial decrease at **Ramatlabama** (↓**17%**) and **Skilpadshek** (↓**8%**). Southbound traffic (Westbound for Lebombo) increased slightly at **Beitbridge** (↑**4%**), **Groblersbrug** (↑**3%**), and **Skilpadshek** (↑**3%**) – and decreased significantly at **Kopfontein** (↓**19%**).

Weekly land border crossing figures in the SADC region show that the average queue time increased slightly by around **20 minutes** from last week, as transit time also decreased marginally. The median border crossing times at South African borders increased marginally, averaging **~8.8 hrs** (↓**10%**) for the week. In contrast, the greater SADC region (excluding South African-controlled borders) **was essentially stable**, averaging **~6.9 hrs** (↑**3%**). This week, on average, **the same 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)** operational disruptions at Beitbridge and Kopfontein due to system and power failures; **(2)** continued reports of unlawful passport confiscations and enforcement irregularities; and **(3)** scheduled SARS digital platform maintenance.

In summarising this edition, June's consolidated port statistics provide further evidence that South Africa's ports are sustaining a meaningful operational recovery. Container throughput reached **454,460 TEUs** in June, up ↑**33%** month-on-month and ↑**22%** year-on-year, while total bulk cargo increased ↑**9%** month-on-month and ↑**3%** year-on-year. Most importantly, the year-to-date trajectory remains firmly positive, with container volumes up ↑**9.4%** and total bulk cargoes up ↑**9.0%** compared with the same period last year.

These are very encouraging results and suggest that recent operational restructuring and performance-focused interventions are delivering tangible improvements. However, it is important not to conflate operational gains with structural reform. The current momentum should reinforce, rather than diminish, the imperative to continue implementing deeper institutional and structural reforms that will secure long-term competitiveness, resilience, and sustained growth across the national ports system.

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 6 to 12 July (measured in TEUs)

7-day flow reported (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)	2,098	14,689	↓4%
Cape Town Container Terminal	2,623	18,361	↓12%
Ngqura Container Terminal	2,599	18,193	↑7%
Port Elizabeth Container Terminal	943	6,602	↑29%
Other	607	4,246	↑48%
Total	**8,870**	**62,091**	**↑2%**

Source: Calculated from TPT, 2026. Updated 12/07/2026.

An average of **~8,870 TEUs** (↑2%) was handled per day for the last week (*6 to 12 July, Table 2*). Consequently, throughput was above the projected average of **~7,912 TEUs** (↑12% actual versus projected). For the coming week, a decreased average of **~7,912 TEUs** (↓11%) is predicted to be handled (*13 to 19 July*, *Table 3*).

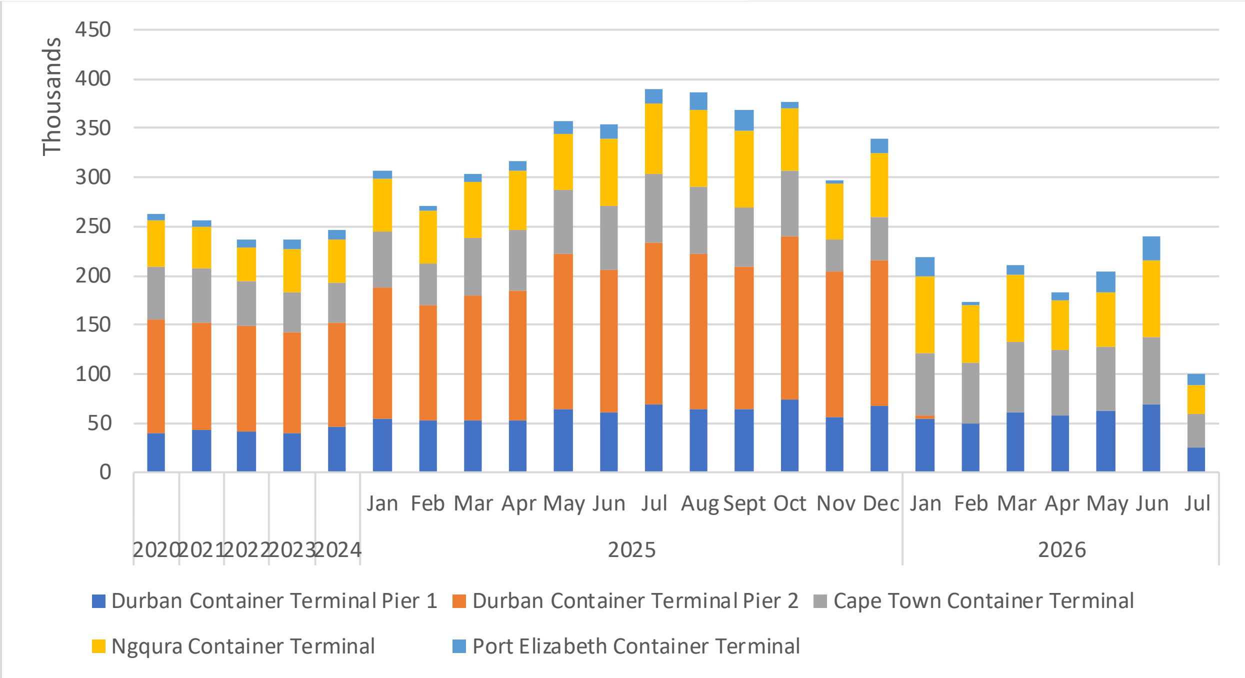
Table 3 – Container Ports – Weekly flow projected for 13 to 19 July (measured in TEUs)

7-day flow projected (13/07/2026 – 19/07/2026)			
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	↓5%
Cape Town Container Terminal	2,257	15,801	↓14%
Ngqura Container Terminal	2,341	16,387	↓10%
Port Elizabeth Container Terminal	448	3,138	↓52%
Other	866	6,062	↑43%
Total	**7,912**	**55,387**	**↓11%**

Source: Calculated from TPT, 2026. Updated 12/07/2026.

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 12/07/2026.

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 afternoon:

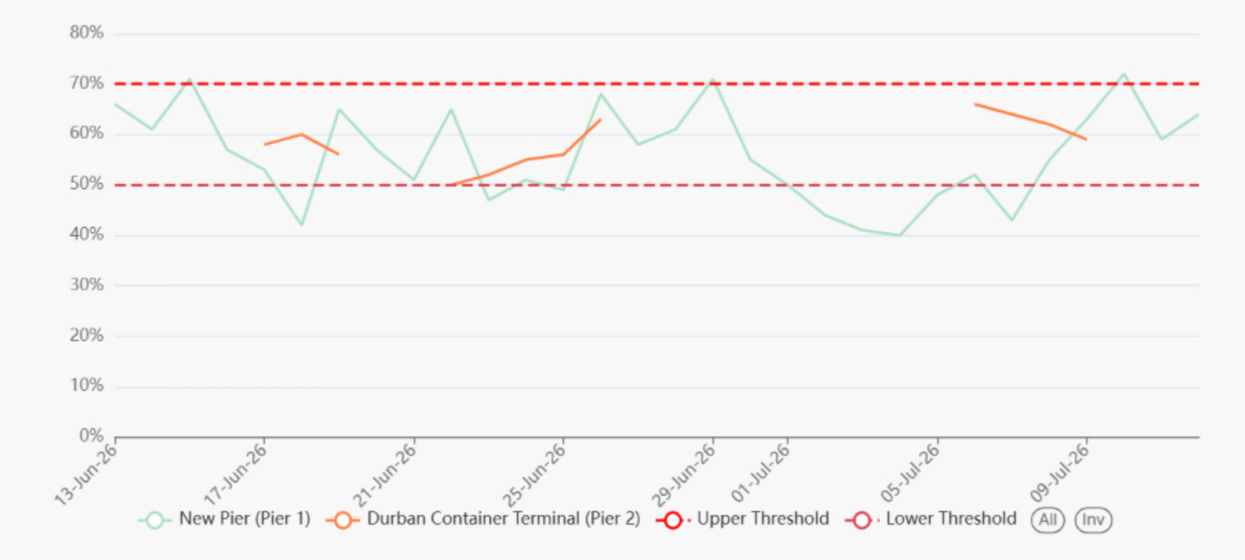
Table 4 – Vessel Dwell Time

Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.5	2.3
Cape Town	FPT	0.8	3.0
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 14/07/2026.

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

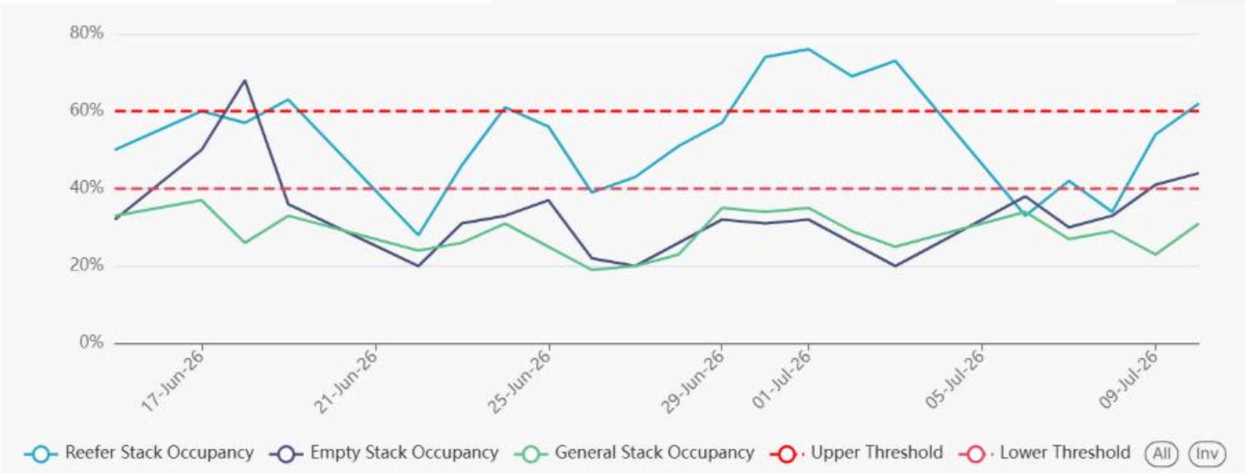
Figure 4 – Stack occupancy in Durban, general-purpose containers (13 June to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 12/07/2026.

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 (15 June to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 12/07/2026.

b. TNPA: June update

TNPA has released consolidated port statistics for June[6], with the figures showing that:

- Container throughput totalled **454,460 TEUs**, which is up by a solid **↑33%** (m/m) and by **↑22%** (y/y).
- Total bulk cargo totalled **19,157 million tonnes**, which is up by **↑9%** (m/m) and up by **↑3%** (y/y).
- Vehicle throughput totalled **86,979 units**, which is up by **↑40%** (m/m) and up by **↑24%** (y/y).

The following table shows the changes from June per sub-sector group:

[6] Transnet. 2026. Port statistics.

Table 5 – TNPA – Monthly volume and growth: June 2026

	May	June	Movement	% change
Containers (TEUs)	**342,363**	**454,460**	**112,097**	**33%**
Landed	182,496	229,126	46,630	26%
Shipped	159,867	225,334	65,467	41%
Dry bulk (MT)	13,512,000	15,424,602	1,912,602	14%
Liquid bulk (MT)	3,554,078	3,153,986	-400,092	-11%
Breakbulk (MT)	554,915	578,216	23,301	4%
Vehicles (Units)	62,300	86,979	24,679	40%
Total cargo (excl. Vehicles)	**17,620,993**	**19,156,804**	**1,535,811**	**9%**

Source: Calculated from TNPA, updated 12/07/2026.

The main throughput levels are up versus last year and have also increased in comparison to pre-pandemic numbers of 2019:

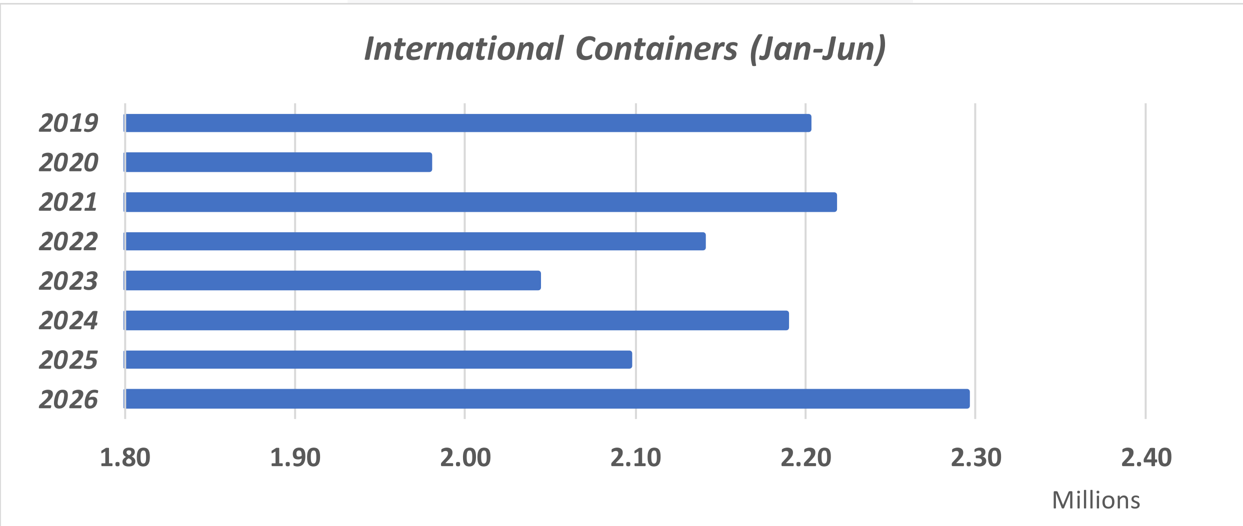
Table 6 – TNPA – Cyclical volume and growth: June 2019, 2025, and 2026

	2019	2025	2026	Growth: '19-'26	Growth: '25-'26
Containers (TEUs)	**389,779**	**373,644**	**454,460**	**17%**	**22%**
Landed	206,486	188,732	229,126	11%	21%
Shipped	183,293	184,912	225,334	23%	22%
Dry bulk (MT)	15,208,884	15,277,178	15,424,602	1%	1%
Liquid bulk (MT)	2,779,753	2,713,689	3,153,986	13%	16%
Breakbulk (MT)	330,235	642,527	578,216	75%	-10%
Vehicles (Units)	67,025	70,291	86,979	30%	24%
Total cargo (excl. Vehicles)	**18,318,872**	**18,633,394**	**19,156,804**	**5%**	**3%**

Source: Calculated from TNPA, updated 12/07/2026.

Similar to *Figure 2*, the following table illustrates the year-to-date container throughput, which is January-to-June up by **↑9.4%** (y/y):

Figure 6 – Year-to-date flows 2019-2026: ocean, (y/y) (TEUs, millions)



Source: Calculated from TNPA, updated 12/07/2026.

c. Summary of port operations

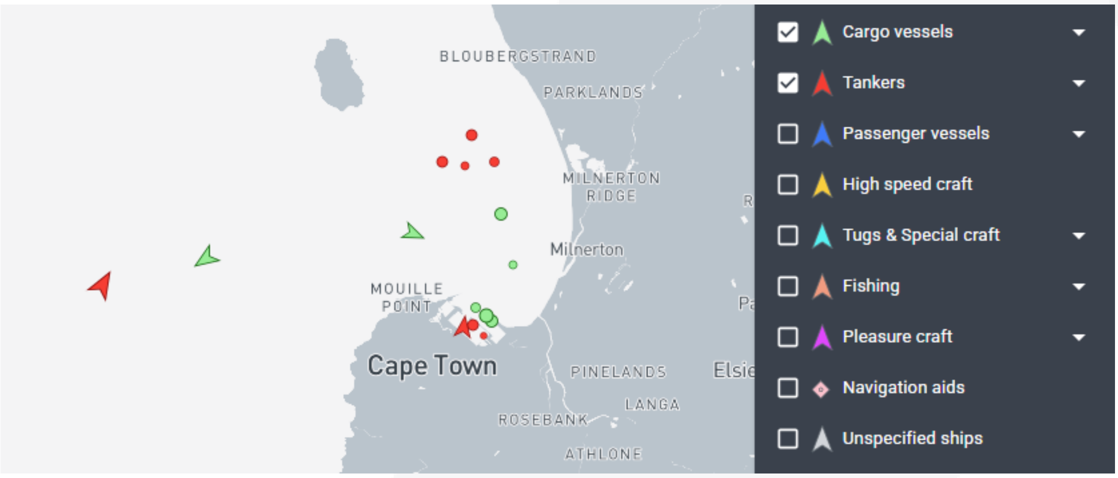
i. Cape Town

Cape Town Container Terminal reported a relatively stable week, with a minor decline in waterside volumes, following last week's strong performance. Vessels spent an average of two hours at anchorage and 41 hours at berth. Equipment availability remained strong with an average of eight out of 9 cranes and 28 out of 32 RTGs available throughout the week. The terminal suffered significant weather delays towards the end of the week.

Cape Town Multi-Purpose Terminal had another slow week, with a significant decline in waterside volumes, with the first vessel visit for the week arriving on Sunday. Equipment availability remained unchanged with an average of two out of three cranes and three out of five straddle carriers available throughout the week.

For Berth A, the AGL Terminal completed a vessel early in the week, with no further vessels scheduled for the past or current week as the terminal embarks on some quay-side maintenance.

Figure 7 – Cape Town vessel view (per vessel group)



Source: Marine Traffic. Updated 12/07/2026 at 14:00.

ii. Durban

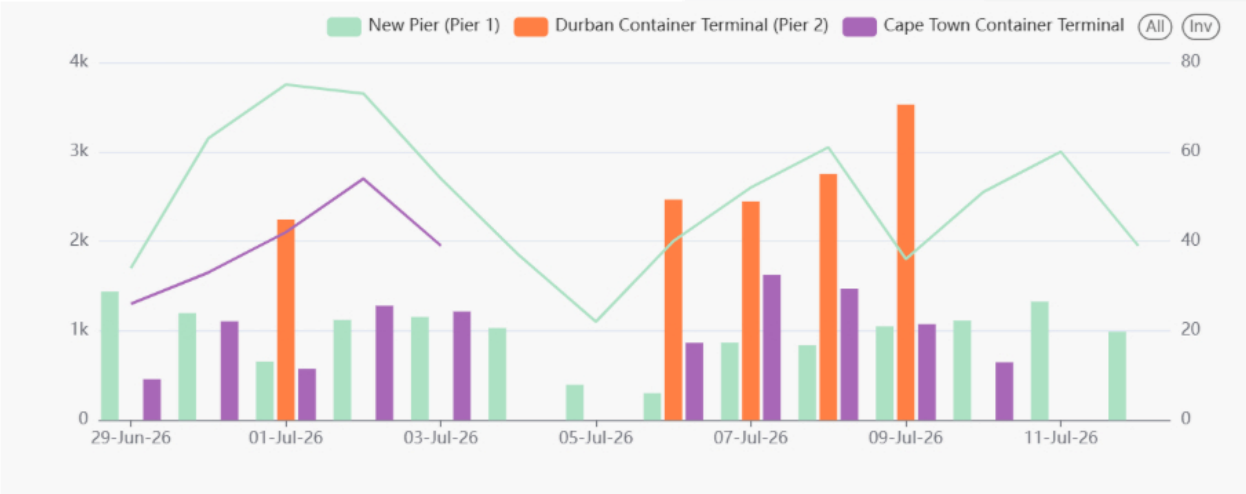
Pier 1 reported another steady week, with a minor fluctuation in waterside volumes. However, vessel turnaround times have improved, notably on anchorage, down from 57 hours the week before to 15 hours for the reporting period, with vessels spending an average of 49 hours at berth. Equipment availability remained steady with an average of four out of seven cranes, and a notably strong RTG complement of 24 out of 25 available throughout the week. The **TTT** for the week averaged **~48 minutes** (**↓16%**, w/w), and the average **staging time** was **~26 minutes** (**↓21%**).

Durban Gateway Terminal's estimated waterside volumes declined significantly to only **2,087 moves per day**, down from **3,871 per day the previous week**. There was an increase in time at anchorage to 63 hours (up from 47 hours the previous week); in contrast, time at berth showed an improvement to 66 hours (down from 110 hours the previous week). Throughout the week, various industry partners noted significant challenges with relation to landside volumes at DGT.

Durban Multi-Purpose Terminal had another slow week, with a minor increase of 4% in waterside volumes. Vessels spent an average of 38 hours at anchorage and 68 hours at berth, similar to the previous week, with crane availability remaining limited, with an average of two out of four cranes operational throughout the week.

The following figure summarises the performance of Cape Town and Durban's container terminals for the last two weeks, focusing on gate moves and time spent in the terminals.

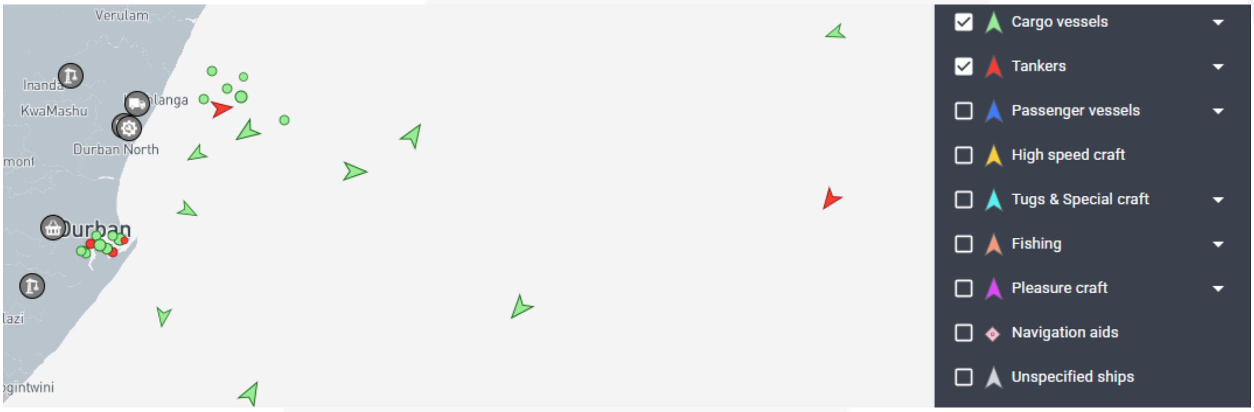
Figure 8 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 12/07/2026.

The queue of container vessels waiting outside Durban **was again stable** this week. On Wednesday morning (15 July), **seven** container vessels were waiting outside at anchorage for Durban, **five** for DGT, **one for Pier 1 and one** for Point. The queue of dry (**five**), liquid (**zero**), and breakbulk (**two**) **was stable** from last week:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 12/07/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal reported a strong week, with an increase in waterside volumes, a sharp decline in time at anchorage to 15 hours (down from 79 hours the previous week), and an average time at berth of 39 hours, in spite of mid-week weather delays. Equipment availability remained consistent with an average of seven out of eight cranes and 24 out of 30 RTGs available throughout the week.

Port Elizabeth Container Terminal reported a strong week, with an increase in waterside volumes of 29%. Vessel turnaround times improved with vessels spending an average of 18 hours at anchorage and 33 hours at berth, down from 28 hours and 44 hours respectively the previous week. In spite of crane breakdowns causing significant delays on Thursday, equipment availability, on average, remained strong with a full complement of cranes and straddle carriers in operation for most of the week.

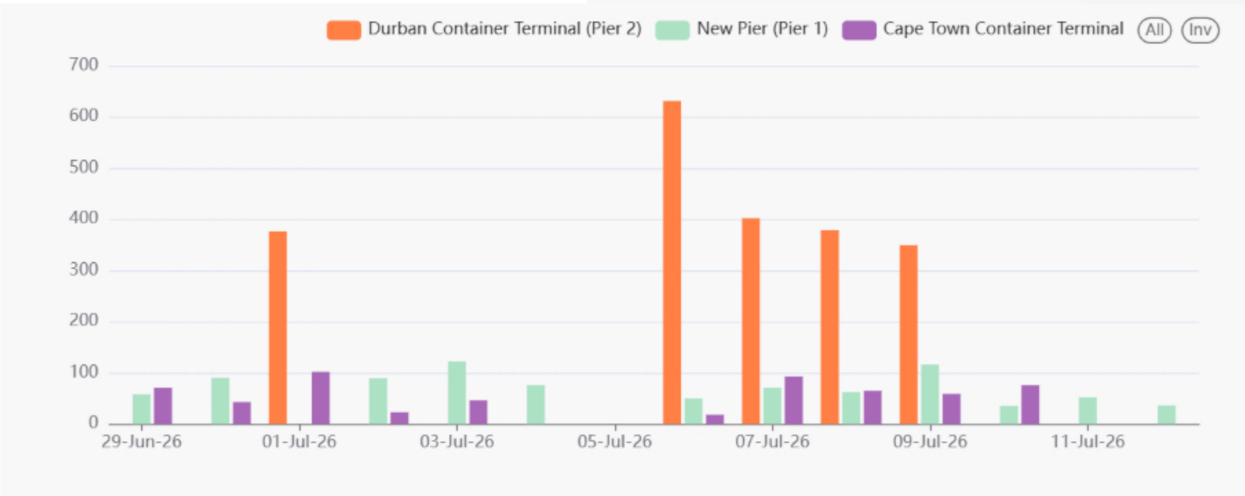
iv. Richards Bay

At RBCT, the daily average coal throughput for the week **increased considerably** and averaged roughly **163,568 tons** (**↑36%**, w/w) a day. An average of **24 trains** was serviced on the landside (constant from last week's **24**), and **above the target** (**22** trains).

v. Transnet Freight Rail (TFR)

In the last week (*6 to 12 July*), rail cargo on the ConCor line out of Durban was reported at **2,183** containers, down by **↓5%** from the previous week's **2,295** containers.

Figure 10 – TFR: Rail handled (Pier 1, Pier 2, and CTCT)



Source: Calculated using data from Transnet, 2025. Updated 12/07/2026.

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 (*6 to 12 July*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *July 2025* was **~848,687 kg**.

Table 7 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**600,084**	**4,200,591**	**↑13%**
Volume outbound	**501,206**	**3,508,445**	**↑48%**
Total	**1,101,291**	**7,709,036**	**↑27%**

Courtesy of ACOC. Updated: 12/07/2026.

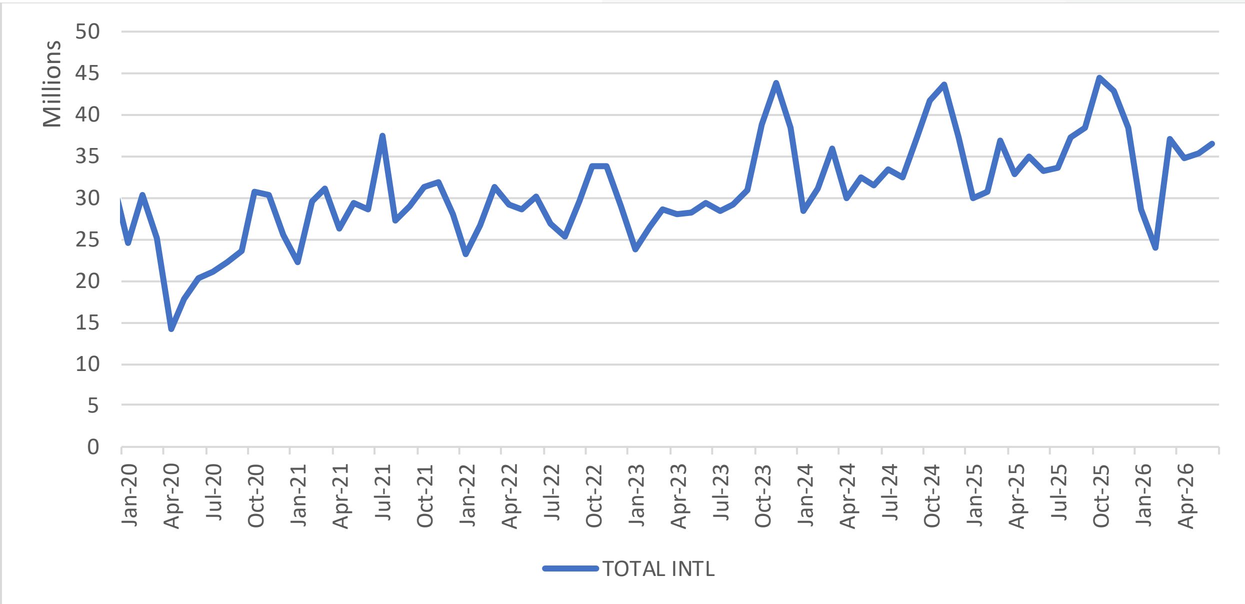
International air cargo to ORTIA rebounded significantly this week – led by outbound cargoes. The daily average amounted to **~600,000 kg** inbound (**↑13%**, w/w) and **~501,000 kg** outbound (**↑48%**). Current volumes to and from ORTIA are significantly above the commensurate volumes of July last year (**↑30%**) and also above the pre-pandemic July of 2019 (**↑30%**).

For the full month of June, a slight increase was again witnessed across the board:

- Johannesburg increased by **↑2%** (m/m) versus May and is up by **↑9%** (y/y) versus 2025.
- Cape Town increased by **↑8%** (m/m) and by **↑13%** (y/y) versus 2025.
- Durban increased by **↑25%** (m/m) but remains down by **↓9%** (y/y).
- Consequently, total international air cargo for June 2026 is up by **↑3%** (m/m) and up by **↑10%** versus 2025.

The following figure shows the international air cargo flows to and from all terminals since the start of 2020:

Figure 11 – International cargo: All terminals (kg millions)



Calculated from ACOC. Updated: 12/07/2026.

The latest reported fuel stock days (as of Wednesday, 15 July) per airport indicate:

- ORTIA: **7.1 days** (target: 5 days)
- CTIA: **3.7 days** (target: 4 days)
- Durban: **~8.2 days** (target: 5 days)

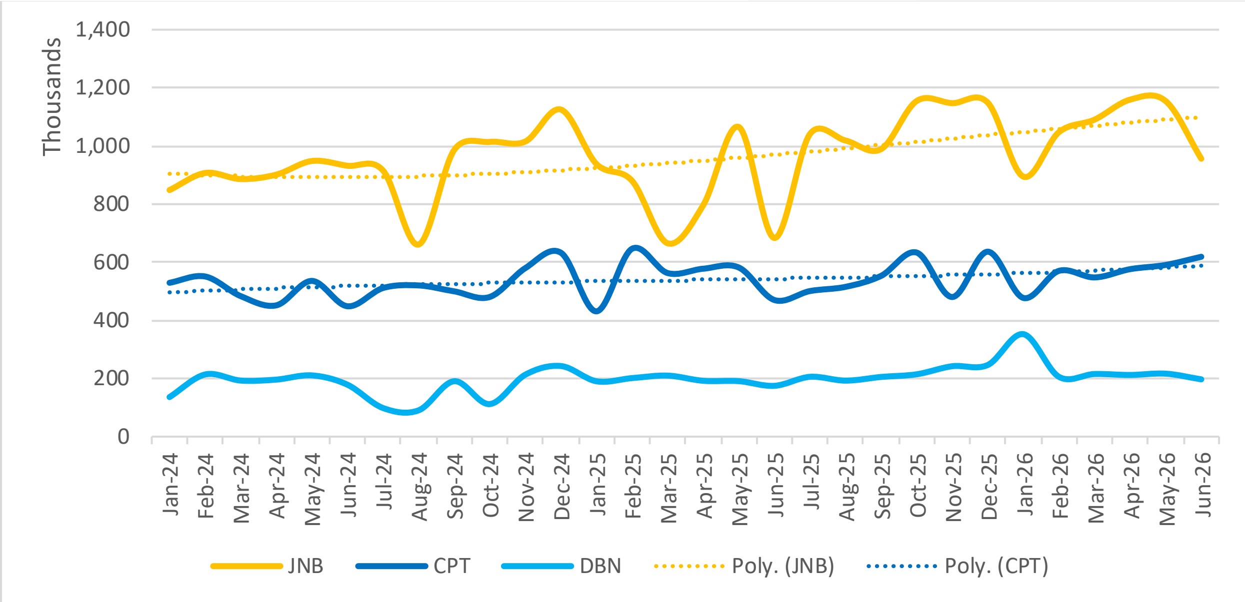
b. Domestic air cargo

For June, domestic volumes handled at our three main terminals mostly decreased month-on-month – but remain up versus the same time last year:

- Johannesburg decreased by **↓17%** (m/m) versus May but is up by **↑8%** (y/y) versus 2025.
- Cape Town increased by **↑5%** (m/m) and is up by **↑32%** (y/y) versus 2025.
- Durban decreased by **↓9%** (m/m), but is up by **↑13%** (y/y) versus 2025.
- Consequently, total monthly domestic air cargo for June is down by **↓10%** (m/m) but is up by **↑33%** (y/y) versus 2025.

The following figure shows the movement since the start of 2024:

Figure 12 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 12/07/2026.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*6 to 12 July*), movements increased by around **30 trucks a day**, as trains from KM4 to Maputo **were stable** (an average of **2 trains per day**).

- Truck volumes through the border post increased to **1,539 HGVs per day** (**↑2%**, w/w).
- Overall, queue times decreased to an average of **~3.6 hours** (**↓28%**, w/w) at the border.
- The average processing times also decreased – to an average of **~3.4 hours** (**↓26%**) per crossing.

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

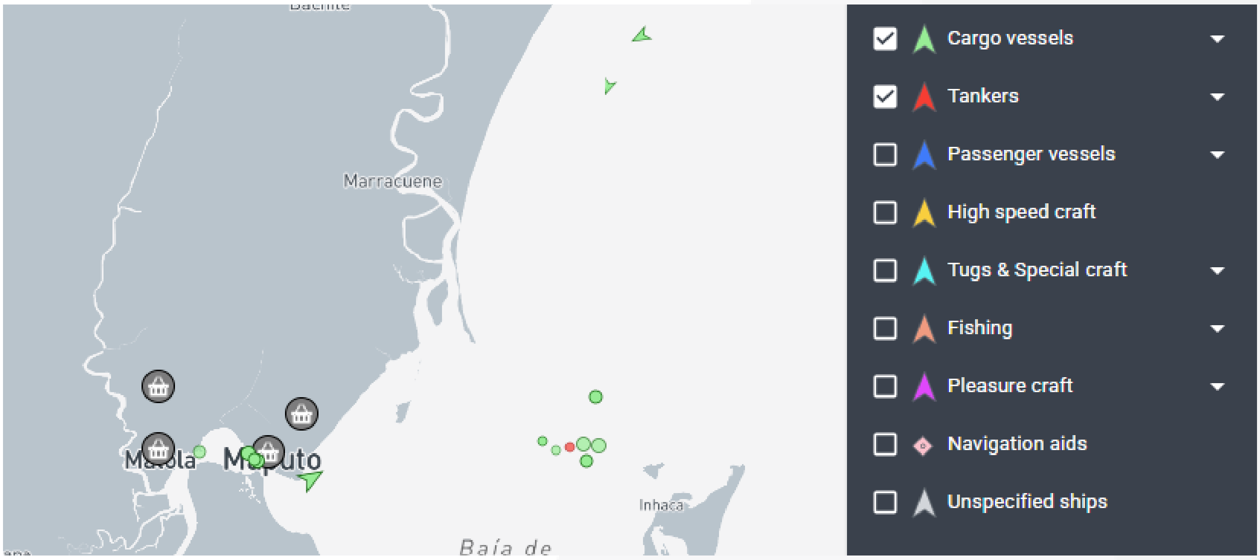
Table 8 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,539	1,524	1,210	195	43	64	39	260
% (w/w)	**2%**	**2%**	**1%**	**5%**	**24%**	**13%**	**26%**	**10%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 12/07/2026.

The following shows a snapshot of the vessels waiting for the Port of Maputo:

Figure 13 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 12/07/2026 at 14:00.

b. SADC cross-border and road freight update

The following table shows the consolidated monthly flow of HGVs across some of the key borders for June:

Table 9 – HGVs – Main South African borders (both directions)

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	15,469	**-1%**	8,517	**4%**	23,986	**1%**
Groblersbrug	6,830	**-5%**	4,694	**3%**	11,524	**-2%**
Kopfontein	6,280	**3%**	1,410	**-19%**	7,690	**-2%**
Lebombo	44,729	**-4%**	43,809	**-1%**	88,538	**-2%**
Ramatlabama	4,425	**-17%**	2,158	**-6%**	6,583	**-13%**
Skilpadshek	8,209	**-8%**	2,455	**3%**	10,664	**-6%**

Source: TransAfricaBorder, 10/07/2026.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts decreased by **↓2.6%** (m/m). Northbound traffic (Eastbound for Lebombo) was mixed, with only **Kopfontein** increasing, and a substantial decrease at **Ramatlabama** (**↓17%**) and **Skilpadshek** (**↓8%**). Southbound traffic (Westbound for Lebombo) increased slightly at **Beitbridge** (**↑4%**), **Groblersbrug** (**↑3%**), and **Skilpadshek** (**↑3%**) – and decreased significantly at **Kopfontein** (**↓19%**).

Notable trends this week in cross-border road freight within South Africa and the broader SADC region:

- Overall, the average queue time increased slightly by around **20 minutes** from last week, as transit time also decreased marginally.
- The median border crossing times at South African borders increased marginally, averaging **~8.8 hrs** (**↓10%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled borders) **was essentially stable**, averaging **~6.9 hrs** (**↑3%**).

1. **Beitbridge Border Post:**
   a. Southbound congestion was reported on Tuesday morning.

   b. Delays were attributed to system-related processing challenges.
   c. Concerns were also raised over an apparently overloaded or oversized vehicle remaining in the queue to cross into Zimbabwe.
   d. A further incident involved a traveller whose passport was allegedly confiscated by a police officer.
   e. The individual was referred to the Beitbridge Border Manager for assistance.
   f. The incident highlights ongoing concerns regarding the unlawful confiscation of passports by enforcement officials.

2. **Kopfontein Border Post:**
   a. A major power outage caused significant operational disruption.
   b. The backup generator also experienced technical failures.
   c. Operators were advised to divert cargo via Skilpadshek or Ramatlabama until normal operations could be restored.
3. **SARS Digital Platform:**
   a. Scheduled maintenance took place on 9 July between 21:30 and 23:00.
   b. Users were advised to expect temporary service interruptions during the maintenance window.

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

Table 10 – 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	558	27.4	8.3	27.0	16,740	3,906
Beitbridge	Zimbabwe-SA	486	5.1	2.0	5.1	14,580	3,402
Groblersbrug	SA-Botswana	232	15.0	1.5	14.6	6,960	1,624
Martin's Drift	Botswana-SA	151	1.9	0.3	1.6	4,530	1,057
Kopfontein	SA-Botswana	191	9.5	1.3	7.2	5,730	1,337
Tlokweng	Botswana-SA	48	0.7	0.2	0.4	1,440	336
Vioolsdrift	SA-Namibia	30	5.4	1.4	5.2	900	210
Noordoewer	Namibia-SA	20	2.9	0.4	2.5	600	140
Nakop	SA-Namibia	30	4.5	1.1	4.3	900	210
Ariamsvlei	Namibia-SA	20	1.7	0.3	1.4	600	140
Skilpadshek	SA-Botswana	231	5.6	1.5	5.3	6,930	1,617
Pioneer Gate	Botswana-SA	81	0.0	0.0	0.0	2,430	567
Ramatlabama	SA-Botswana	152	3.1	0.5	3.1	4,560	1,064
Ramatlabama	Botswana-SA	59	0.5	0.1	0.3	1,770	413
Lebombo	SA-Mozambique	1,523	3.6	1.2	3.4	45,690	10,661
Ressano Garcia	Mozambique-SA	1,525	1.9	0.3	1.5	45,750	10,675
Sum/Average		**5,337**	**5.6**	**1.3**	**5.2**	**160,110**	**37,359**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 05/07/2026.

[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.

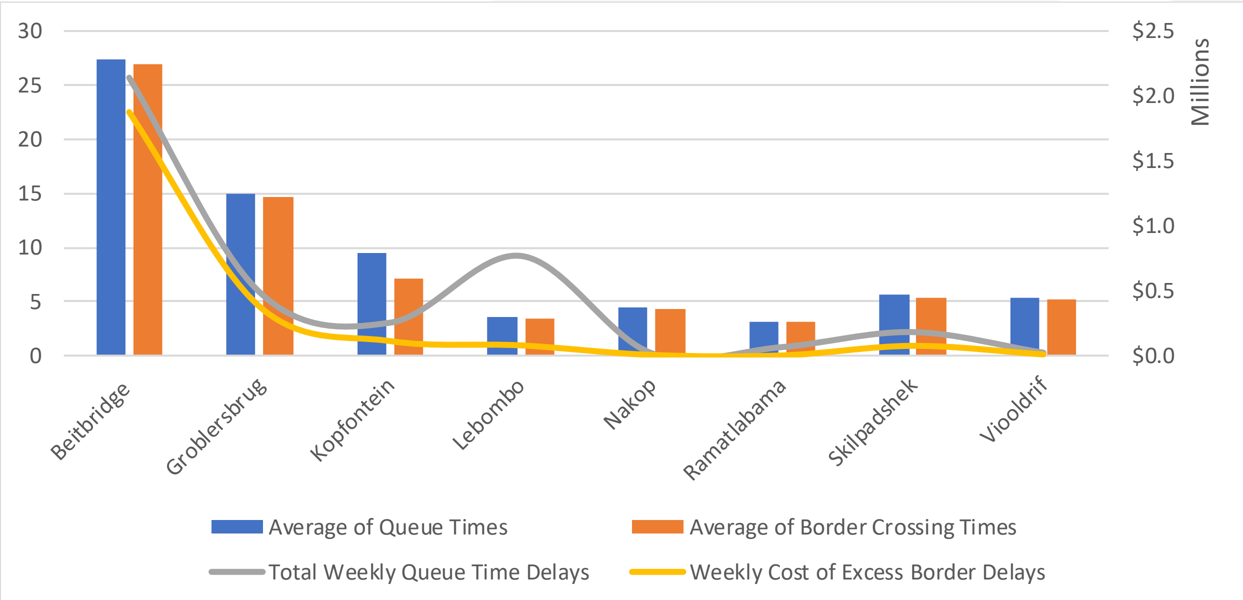
Table 11 – Delays summary – Corridor perspective

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	8.2	2.4	8.1	9,600	2,240
Central Corridor	798	2.1	0.6	2.1	23,940	5,586
Dar Es Salaam Corridor	1,819	19.6	4.4	19.5	54,570	12,733
Maputo Corridor	3,048	2.8	0.7	2.4	91,440	21,336
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,210	16.5	3.6	16.3	96,300	22,470
Northern Corridor	2,817	1.0	0.3	0.9	92,520	21,588
WBNLD Corridor	792	3.1	0.6	2.6	23,760	5,544
Trans Cunene Corridor	100	3.6	0.8	3.4	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	15.8	1.9	15.4	3,480	812
Sum/Average	**13,247**	**7.3**	**1.6**	**7.1**	**405,420**	**94,598**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 05/07/2026.

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

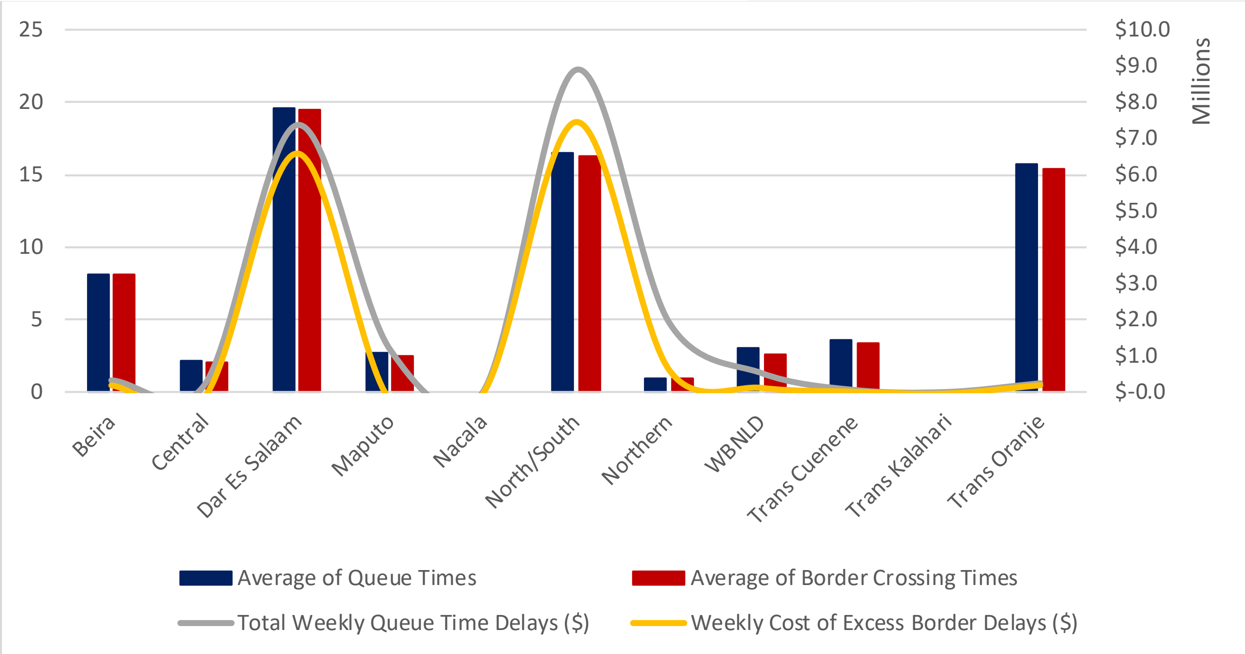
Figure 14 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 05/07/2026.

The following figure echoes those above, this time from a corridor perspective.

Figure 15 – Weekly cross-border delays & estimated cost from a corridor perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay, week ending 05/07/2026.

In summary, cross-border queue time averaged **~7.3 hours** (up by **~0.3 hours** from the previous week's **~7 hours**), indirectly costing the transport industry an estimated **$20.7 million** (**R338 million**). Furthermore, the week's average cross-border transit times hovered around **~7.1 hours** (up by **~0.1 hours** from the **~7 hours** recorded in the previous report), at an indirect cost to the transport industry of **$14.7 million** (**R240 million**). The total indirect cost for the week amounts to an estimated **~$35.4 million** (**R578 million**, up by **↑7.7%** from the **~R537 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 update

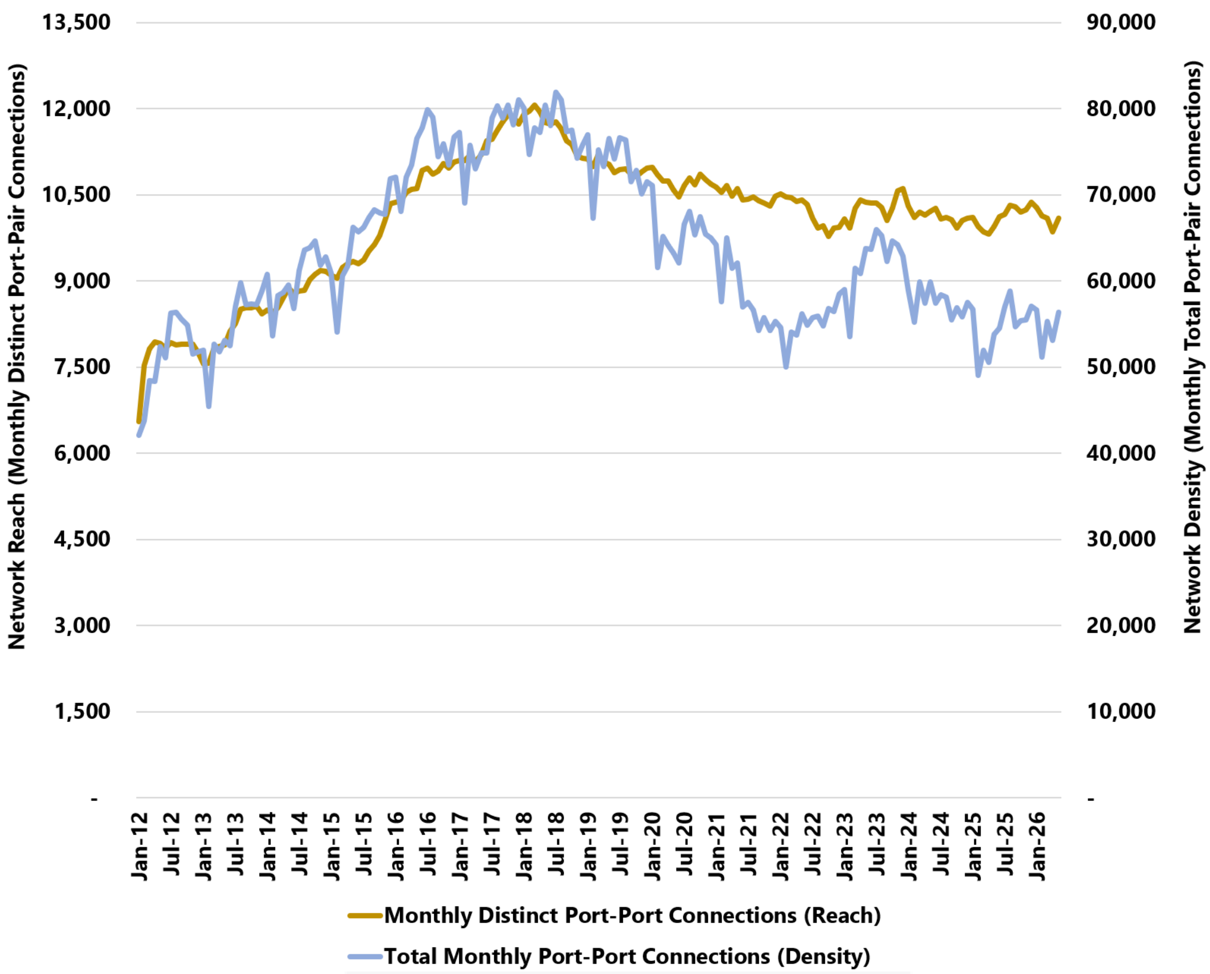
Escalating hostilities between the US and Iran have again disrupted shipping through the Strait of Hormuz, with both sides exchanging strikes and making conflicting claims about whether the waterway remains open. Although a small number of vessels have reportedly transited the strait discreetly, commercial traffic remains severely constrained after attacks on merchant shipping. Container freight rates from the Middle East have surged beyond pandemic-era peaks as carriers suspend services, reroute vessels and impose risk surcharges. The disruption has also lifted oil prices and renewed inflation concerns, and heightened the risk of prolonged supply chain instability across global energy and container markets.

ii. Global liner network changes

Sea-Intelligence's analysis shows that global liner shipping has undergone a structural shift since the pandemic. While carriers have largely preserved their geographic network coverage, they now serve ports less frequently than before 2020, reflecting a move towards leaner, more hub-and-spoke-oriented networks.

Rather than expanding direct services, shipping lines are consolidating calls and relying more heavily on transhipment hubs to maintain connectivity. The findings suggest that this is no longer a temporary response to disruption, but a permanent change in network design aimed at improving efficiency and operational resilience, albeit with fewer direct service opportunities for shippers.

Figure 16 – Global Network Reach versus Density

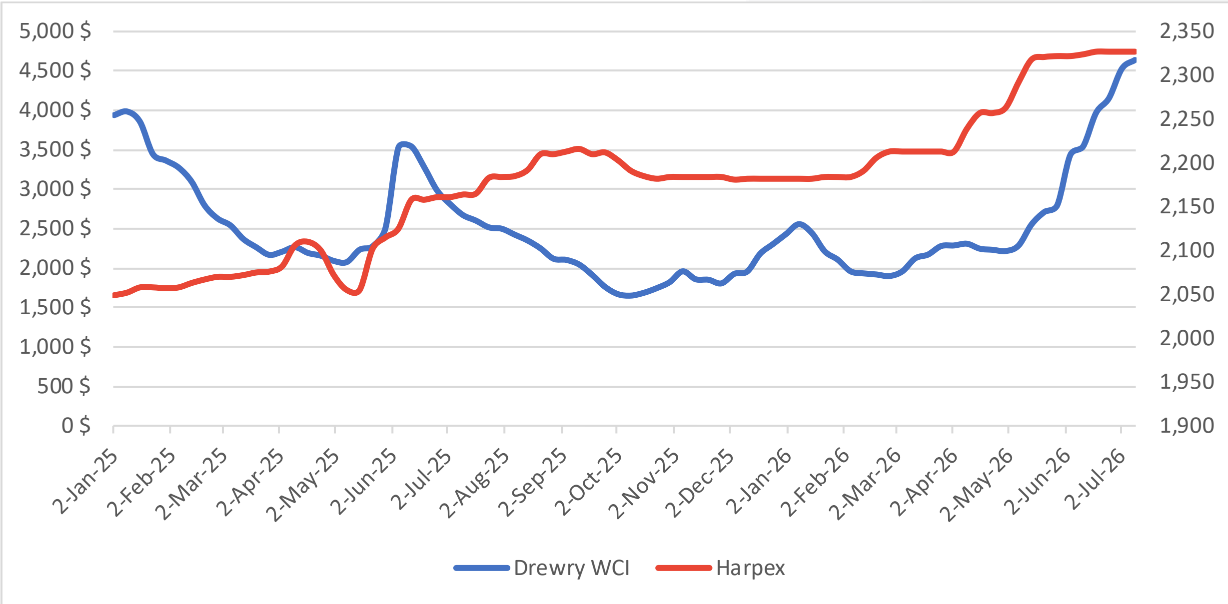


Source: Sea Intelligence

iii. Container freight rates

After the recent surge in spot prices, container freight rates have finally caught up to the comparative charter indices. This week, Drewry's *World Container Index* (WCI) increased by **↑2.4%** to **$4,639 per 40-foot container**, extending its recent rally and reaching its highest level in approximately two years. The benchmark has risen sharply over recent weeks, reflecting sustained strength in the container spot market, with Drewry expecting rates to remain firm in the near term.

Figure 17 – Drewry WCI ($/40ft) & Harper Petersen Index

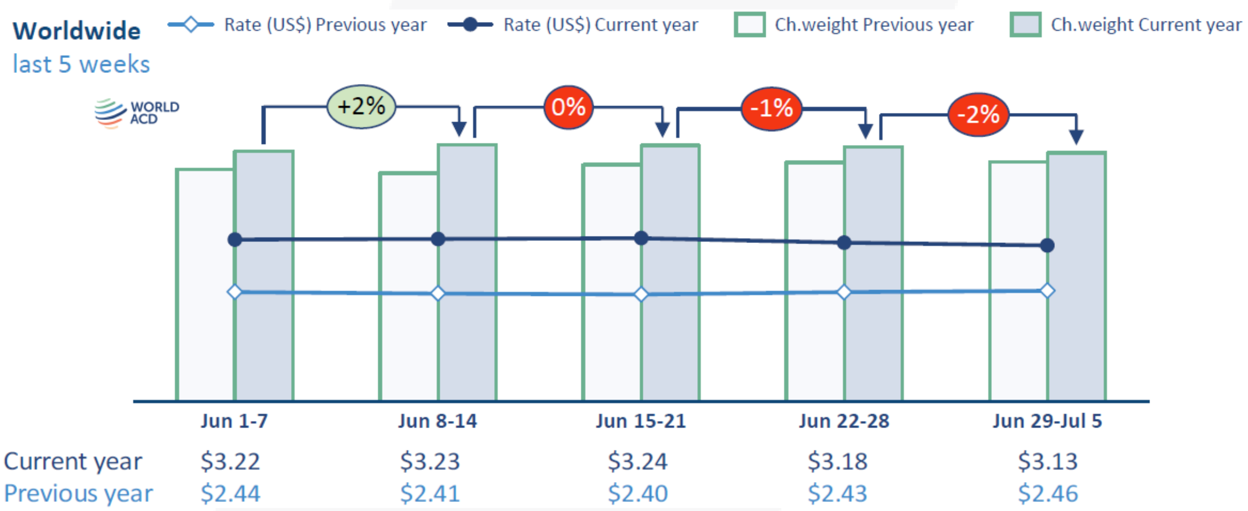


Source: Calculated from: [Drewry](#) & [Harpex](#)

b. Global air cargo industry

The latest weekly data from WorldACD show that global air cargo markets softened further during the week ending 5 July, with average worldwide rates declining **↓1%** week-on-week to **$3.13/kg**, following a **↓2%** drop the previous week, while spot rates fell **↓2%** to **$3.62/kg** as lower fuel prices and softer demand weighed on the market. Worldwide cargo volumes also declined **↓2%**, largely reflecting the US Independence Day holiday and a sharp reduction in Hong Kong–Europe traffic after the EU removed its de minimis duty exemption for low-value imports.

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



Source: [WorldACD](#)

Despite the weekly slowdown, global chargeable weight remains **↑4%** higher than a year ago, led by strong Asia-Pacific demand. Capacity has recovered to slightly above pre-conflict levels, although renewed tensions involving the US and Iran could disrupt operations and place renewed upward pressure on rates in the weeks ahead.

ENDS[10]

[10] ***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.*