

Cargo Movement Update #265¹

Date: 18 January 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)	24 753	28 201	52 954	20 251	23 071	43 322	↑22%
Air Cargo (tons)	3 184	1 941	5 126	2 393	1 919	4 312	↑19%

Monthly Snapshot

Figure 1 – Cyclical⁴ monthly cargo volume, year on year (most metrics: Dec '24 vs Dec '25, % growth)

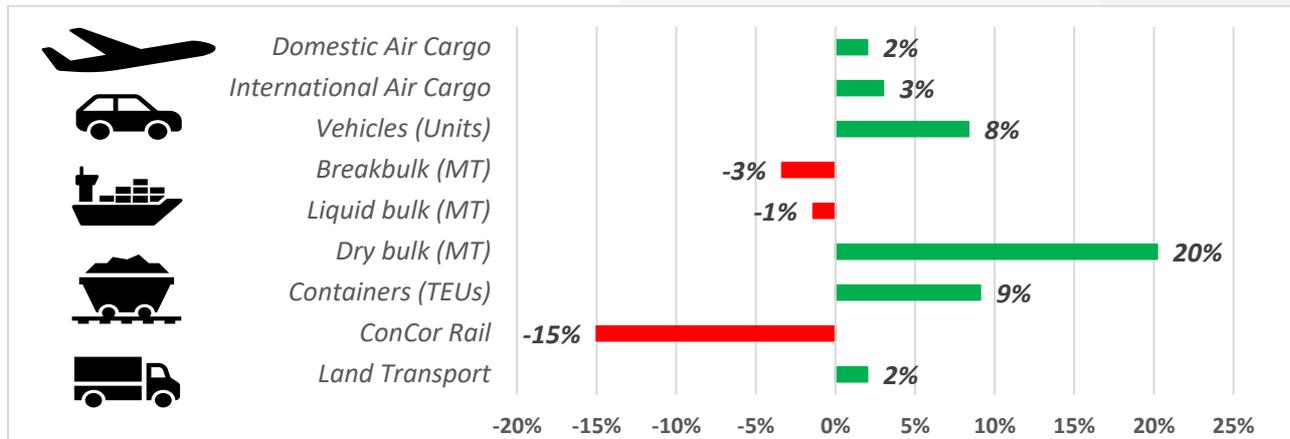
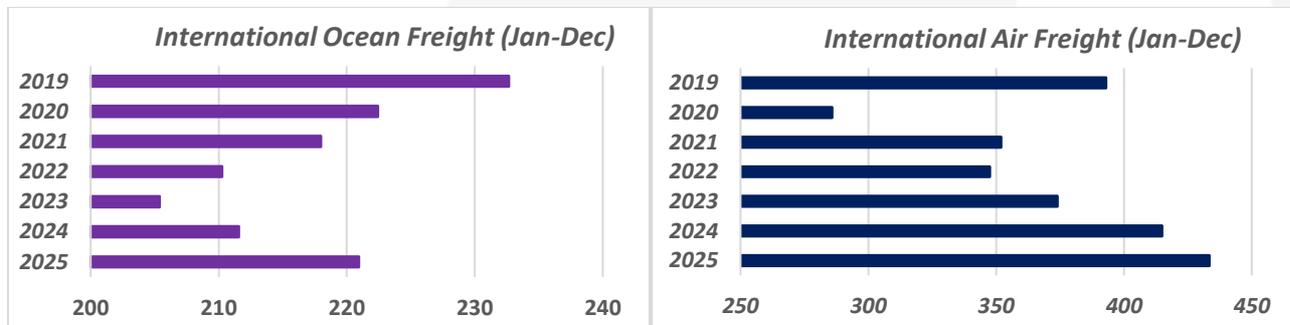


Figure 2 – Year-to-date flows 2019-2025⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~7,565⁶ TEUs were handled per day, with ~6,840 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 3,206 containers, down by ↓9% from last week.
- Cross-border queue: ↓0,1; transit: ↓0,6 hrs; SA borders: ~6,9 hrs (↓19%); SADC: ~4,8 hrs (↓8%).
- Global seaborne dry bulk trade reached a record of 5,7 billion metric tons in 2025 (↑1,7%, y/y) on 2024.
- Global spot rates remain volatile since Christmas (↑16%), but dropped by ↑4,4% to \$2 445/40-ft.
- Global air cargo rose sharply week-on-week (↑26%), reversing the typical year-end contraction.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 265th 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: Dec vs. Dec.

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.

⁶ Figures for this week onward exclude volumes handled by DGT, as the data was not available at the time of reporting

Executive Summary

This update – the *second for 2026* – provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **7,565 TEUs** was handled daily, an increase from **6,189 TEUs** the previous week.

Port operations were plagued by poor weather conditions, particularly in the Western Cape, while the rest of the regions are starting to recover the lost time. Equipment availability remained consistent throughout the week, and backlogs are beginning to clear up.

Globally, updates this week indicate that dry bulk seaborne trade reached a record **~ \uparrow 5,7 billion tonnes** in 2025, up about **\uparrow 1,7%** year-on-year, with iron ore and bauxite driving much of the gain, while coal lagged. At the same time, container shipping faces slower demand growth in 2026, with throughput expansion decelerating below long-term averages, persistent overcapacity, and downward pressure on freight rates expected. A gradual return to Suez Canal routings is factored into market prospects, reinforcing the evolving demand–supply dynamics across segments. Other developments this week included **(1)** Alphaliner data showing that container transits via the Suez Canal remain uneven despite growing discussion of a return, **(2)** warnings that a phased resumption of Suez routings could strain North European and Mediterranean ports through renewed congestion risks, and **(3)** continued downward pressure on ocean spot freight rates as Chinese New Year blank sailings weigh on Asia–Europe and transpacific trades.

International air cargo to and from South Africa for 2025 was up by **\uparrow 4,5%** (y/y) versus 2024 (see *Figure 2*). Simultaneously, calendar year domestic air cargo for 2025 was up by **\uparrow 5,9%** (y/y) versus 2024. For the week, international air cargo to and from South Africa had a very slow start to the year; however, volumes are starting to pick up – especially imports. The daily average of air cargo handled amounted to **~455,000 kg** inbound (**\uparrow 33%**, w/w) and **~277,000 kg** outbound (**\uparrow 1%**). Consequently, because of the increase, the current levels are now significantly above last year's level (**~ \uparrow 14%**) and the comparative levels of pre-pandemic January 2020 (**~ \uparrow 13%**). Operationally, **ACSA has shared** an update confirming a **R332 million**, multi-year refurbishment of the OR Tambo freight warehouse precinct, aimed at restoring regulatory compliance, modernising critical infrastructure, and improving cargo access and operational efficiency, with construction commencing in March 2026 and completion expected by December 2027.

Global air cargo markets recorded a pronounced post-holiday rebound in early January, although volumes and pricing dynamics remain mixed. Worldwide chargeable weight rose sharply week-on-week (**\uparrow 26%**), reversing the typical year-end contraction, yet tonnages remain around **\downarrow 20%** below mid-December peaks. Despite the volume recovery, yields remain under pressure. Average global rates eased further to around **\$2,46/kg**, down roughly **\downarrow 10%** from mid-December levels, although marginally above last year's equivalent.

On the N4 corridor, movements increased slightly for heavy-goods vehicles. Truck volumes through the border post increased to around **1,333 HGVs per day** (**\uparrow 2%**, w/w). Queue times increased to an average of **~3,4 hours** (**\uparrow 21%**) at the border. The average processing times also increased to an average of **~3,4 hours** (**\uparrow 28%**) per crossing.

Heavy goods vehicle (HGV) traffic through South Africa's main border posts for December dropped by **\downarrow 12%** (m/m), driven primarily by the reduction of trade over the Festive Season. Northbound traffic (Eastbound for Lebombo) decreased across the board, with the total reductions evident at **Beitbridge** (**\downarrow 13%**), **Lebombo** (**\downarrow 13%**), and **Skilpadshek** (**\downarrow 14%**).

Weekly figures in the SADC region show that cross-border road transport times, on average, decreased slightly. Overall, the average queue time decreased by **10 minutes** from last week, while transit time

decreased by about **half an hour**. The median border crossing times at South African borders decreased by more than **an hour and a half**, averaging **~6,9 hrs (↓19%)** for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased by more than **half an hour**, averaging **~4,8 hrs**. This week, on average, only one SADC border took around a day to cross, namely Kasumbalesa (taking **around three days** from the **Zambian side**). Nevertheless, four other borders took close to a day, namely Beitbridge, Chirundu OSBP, Forbes, and Katima Mulilo. Cross-border developments this week included **(1)** security-related disruptions and temporary route closures in the Democratic Republic of Congo following unrest linked to the artisanal mining ban, **(2)** concerns over differential road toll charges applied to Tanzanian-registered trucks in Zambia, and **(3)** a protest-related disruption at the Ramatlabama border post due to electricity supply issues.

In concluding the second edition, we look forward to a positive, collaborative year in trade, transport, and logistics. Going ahead, there are emerging signals that confidence in South Africa's logistics backbone has not been irreparably eroded. Recent market appetite for Transnet's debt issuance, which reportedly attracted bids of roughly **R42 billion**⁷ — points to sustained investor belief in the strategic value of the national freight network, notwithstanding the lost years and well-documented operational failings. This interest reflects a forward-looking assessment: that with credible reform, improved governance, and disciplined execution, logistics performance can recover. Ultimately, trade, transport and logistics remain *foundational economic infrastructure*. Their effectiveness will continue to shape competitiveness, investment decisions, and South Africa's capacity to convert policy intent into real economic growth.

⁷ Peyper, L. 20/01/2026. [Transnet debt sale draws record demand, attracting R42bn in bids.](#)

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1. Ports Update

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

a. Container flow overview

The following tables indicate the container flows reported for the last seven days. The reporting aligns with TPT's cycle, which runs from Monday to Sunday.

With the transition of Durban Container Terminal Pier 2 to Durban Gateway Terminal under ICTSI, reporting structures have been revised. As a result, DGT data is not included in this section of the report at present. This omission is noted with concern, and a constructive appeal is made to DGT leadership to reconsider this approach, as collaborative data-sharing practices are in the collective interest of all stakeholders and have demonstrably contributed to the system-wide performance improvements observed over the past 18 months.

Table 2 – Container Ports – Weekly flow reported for 12 to 18 January (measured in TEUs)

7-day flow reported (12/01/2026 – 18/01/2026)			
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)	1 011	7 074	↓42%
Cape Town Container Terminal	2 384	16 688	↑37%
Ngqura Container Terminal	2 634	18 439	↑32%
Port Elizabeth Container Terminal	1 073	7 511	↑765%
Other	463	3 242	↓23%
Total	7 565	52 954	↑22%

Source: Calculated from TPT, 2026. Updated 18/01/2026.

An average of ~**7,565 TEUs (↑22%)** was handled per day for the last week (12 to 18 January, Table 2). Consequently, throughput was slightly above the projected average of ~**6,840 TEUs (↑11%** actual versus projected). For the coming week, a decreased average of ~ **6,840 TEUs (↓10%)** is predicted to be handled (19 to 25 January, Table 3).

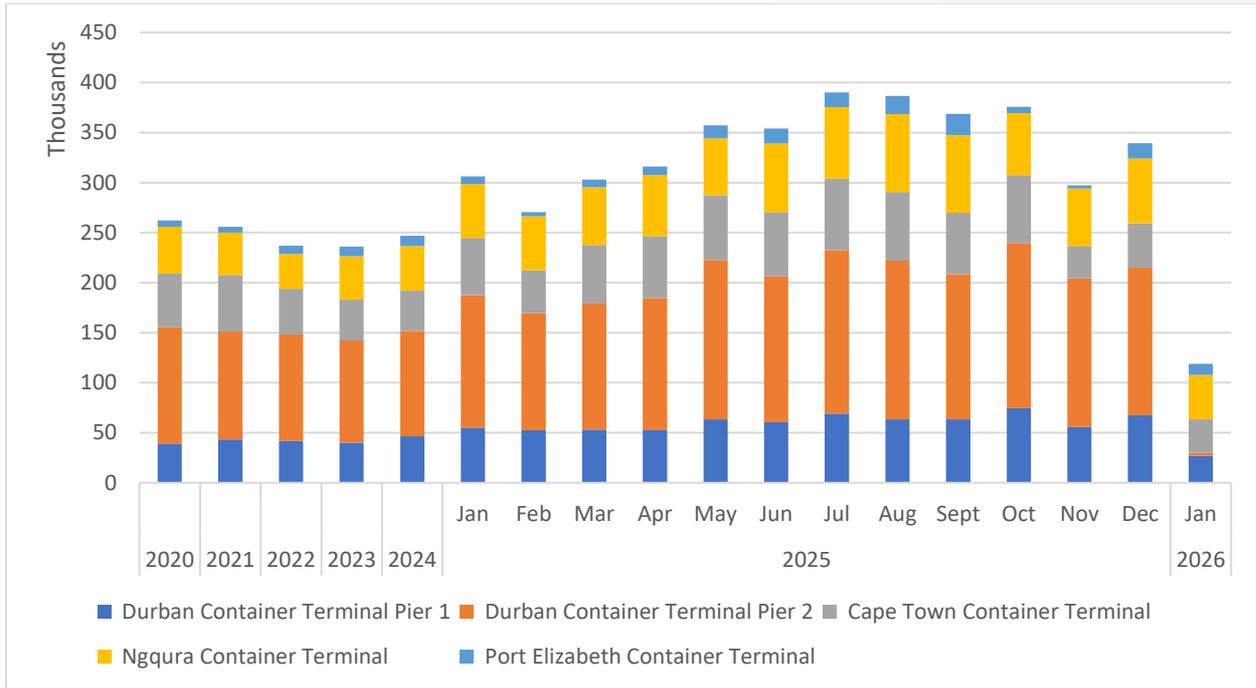
Table 3 – Container Ports – Weekly flow projected for 19 to 25 January (measured in TEUs)

7-day flow projected (19/01/2026 – 25/01/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	Since the transition from DCT to DGT, no information has been received.		
New Pier (Pier 1)	1 645	11 518	↑63%
Cape Town Container Terminal	1 910	13 373	↓20%
Ngqura Container Terminal	1 922	13 451	↓27%
Port Elizabeth Container Terminal	366	2 561	↓66%
Other	997	6 976	↑115%
Total	6 840	47 878	↓10%

Source: Calculated from TPT, 2026. Updated 18/01/2026.

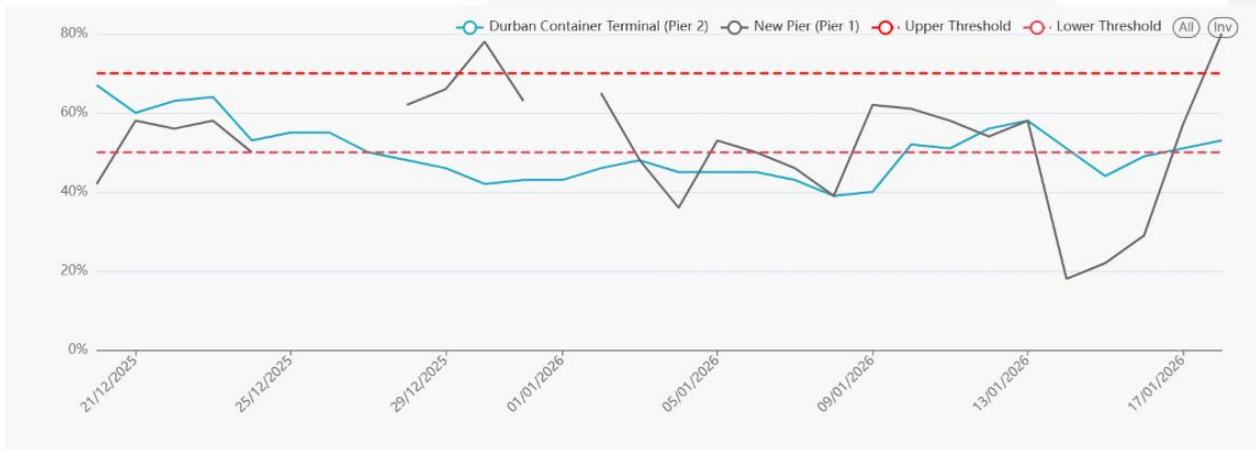
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

Figure 3 – Monthly flow reported for total container movement (thousands, 2020 to present, m/m)



Source: Calculated from TPT, 2026, and updated 18/01/2026.

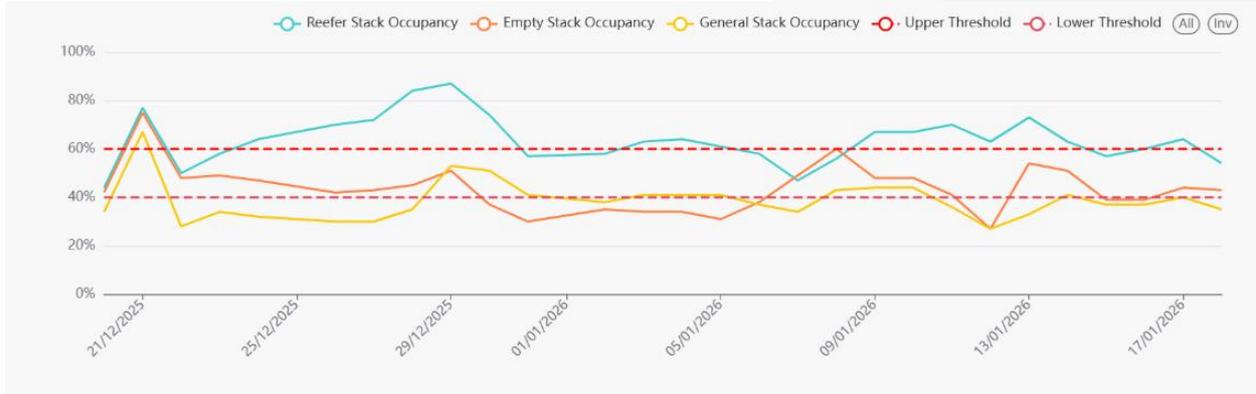
Figure 4 – Stack occupancy in DCT, general-purpose containers (21 December to present; day on the day)



Source: Calculated using data from Transnet, 2026, and updated 18/01/2026.

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 (21 December to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 18/01/2026.

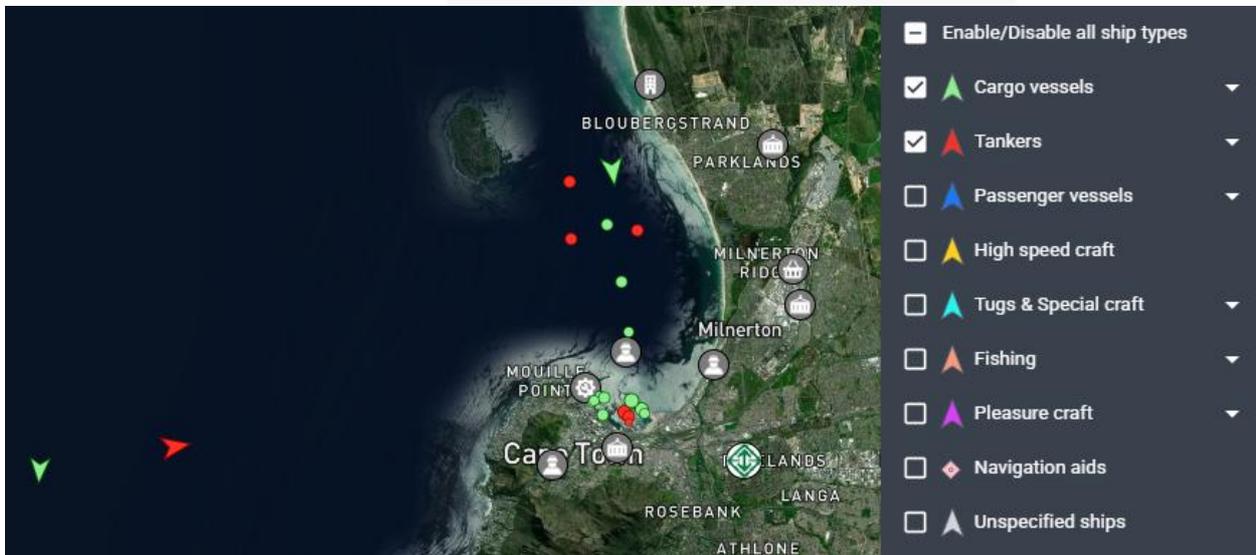
b. Summary of port operations

i. Cape Town

The Cape Town Container Terminal suffered significant weather delays throughout the week, with a total of more than 40 hours lost. In contrast to the challenges with weather, the terminal had a much stronger performance with equipment, with an average of 8 out of 9 STS cranes available and 28 out of 31 RTGs. This meant that when the weather subsided, the terminal was able to leverage the opportunity to work on catching up on the backlog.

Cape Town Multi-Purpose Terminal also suffered weather delays, though not as significant as CTCT, with single crane outages throughout the week.

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



Source: Marine Traffic. Updated 18/01/2026 at 14:00.

ii. Durban

Weather conditions throughout the Eastern and Western Coasts had a knock-on effect, causing vessel delays, which led to a significantly lower than usual berth occupancy at Durban Container Terminal’s Pier 1.

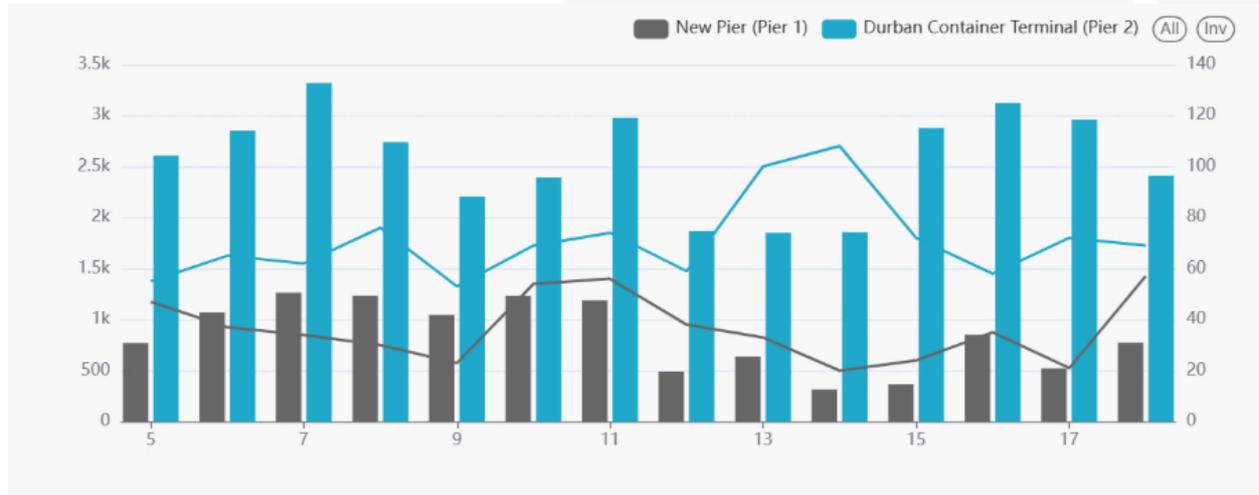
Though towards the end of the week, the situation has been improving. On the landside, the TTT for the week averaged ~33 minutes (↓18%, w/w), and the average staging time was ~19 minutes (↓10%). Equipment availability throughout the week remained consistent, though not quite where it could be, with 5 out of 7 cranes available, and 17 out of 25 RTGs.

The Durban Gateway Terminal, through new reporting structures, reported little with regard to challenges on both land and waterside. Container volumes (TEUs) average volumes per day 3,200 TEUs, up from 2,635 last week (↑21%). The TTT for the week averaged ~77 minutes (↑8%, w/w), and the average staging time was ~53 minutes (↑10%). Equipment availability remained consistent for the terminal, with cranes 10 out of 15.

Durban’s MPT terminal was plagued by crane breakdowns, running with only one or two cranes (out of the full complement of four) throughout the week. The impact thereof was minimal, as the terminal had only one vessel at berth (as opposed to the usual two), allowing the team time to work on the breakdowns.

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

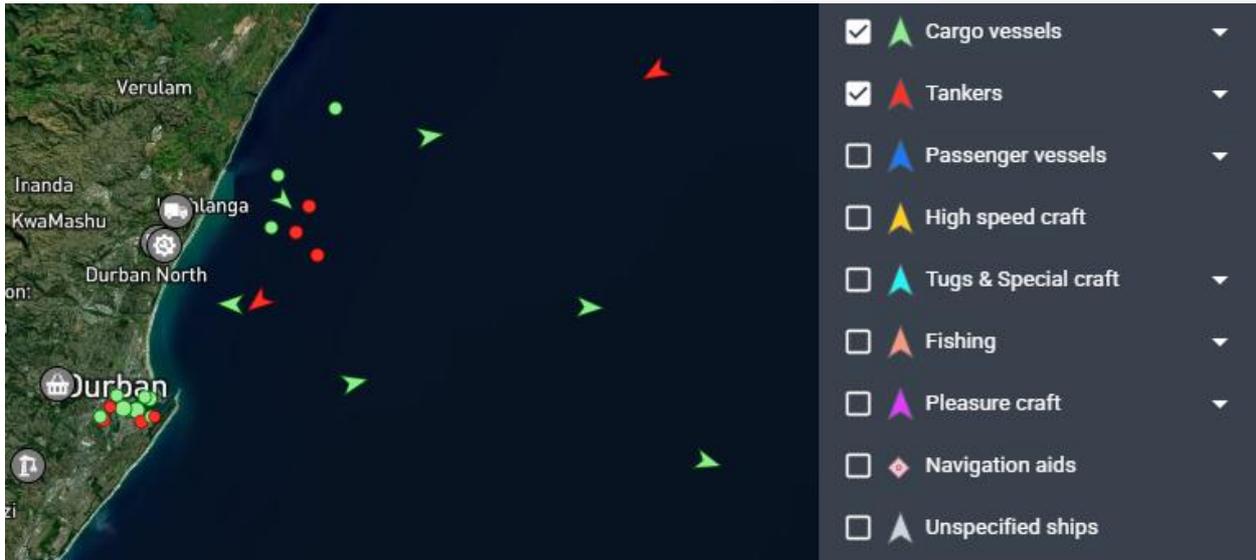
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 18/01/2026.

The queue of container vessels waiting outside Durban increased slightly this week. On Wednesday evening (21 January), **two** container vessels were waiting outside at anchorage – one for Pier 1 and one for DGT. The queue of dry (**one**), liquid (**seven**), and breakbulk (**two**) vessels also slightly increased from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 18/01/2026 at 14:00.

iii. Richards Bay

The daily average coal throughput for the week increased and averaged around **166,000 tons** (**↑31%**, w/w) a day. An average of **23 trains** was serviced on the landside (down by **one** from last week), and slightly above the target (of 22 trains).

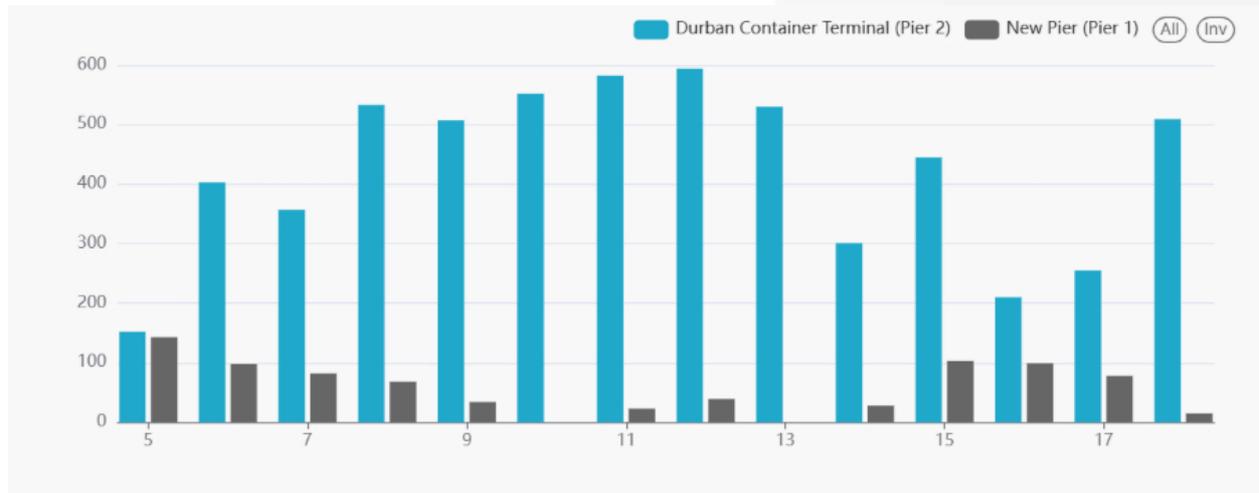
iv. Eastern Cape ports

The Ngqura and Port Elizabeth Container Terminals suffered minor weather delays, with congestion starting to clear up at NCT as the terminal returned to operation. Minimal equipment breakdowns were reported. PECT advised that one of their STS cranes will be on planned maintenance from 19 January to 31 March, while the other STS crane and MHC will remain in operation.

v. Transnet Freight Rail (TFR)

There were no significant incidents reported throughout the week, with the exception of the City Deep – Mafikeng line, which is still not running due to the unavailability of locomotives. No feedback has been shared with the industry regarding a possible solution or timeline.

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



Source: Calculated using data from Transnet, 2025. Updated 18/01/2026.

In the last week (12 to 18 January), rail cargo on the ConCor line out of Durban was reported at **3,206** containers, down by **↓9%** from the previous week's **3,872** containers.

2. Air Cargo Update

a. International air cargo

The following table shows the inbound and outbound air cargo flows to and from ORTIA for the week (12 to 18 January). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in January 2025 averaged **~643,564 kg**.

Table 4 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	454 916	3 184 409	↑33%
Volume outbound	277 333	1 941 329	↑1%
Total	732 248	5 125 738	↑19%

Courtesy of ACOC. Updated: 18/01/2026.

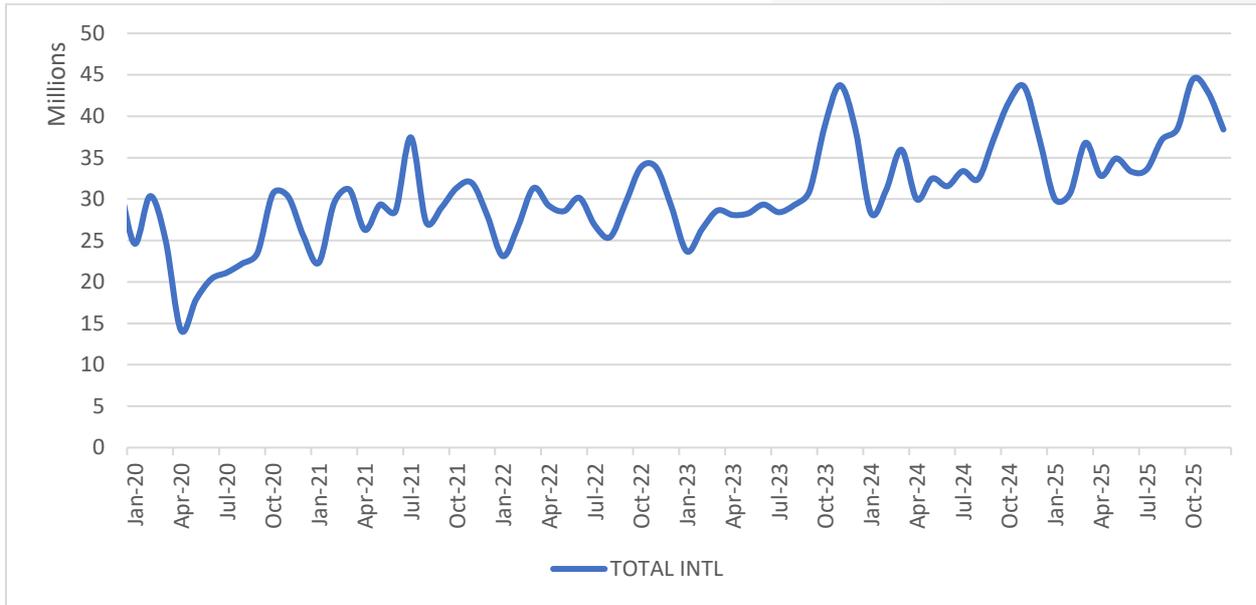
International air cargo to South Africa had a very slow start to the year; however, volumes are starting to pick up – especially imports. The daily average of air cargo handled amounted to **~455,000 kg** inbound (**↑33%**, w/w) and **~277,000 kg** outbound (**↑1%**). Consequently, because of the increase, the current levels are now significantly above last year's level (**~↑14%**) and the comparative levels of pre-pandemic January 2020 (**~↑13%**).

For the full month of December:

- Johannesburg decreased by **↓8%** (m/m) versus November, but is up by **↑10%** (y/y) versus 2024.
- Cape Town decreased by a substantial **↓18%** (m/m) and by **↓12%** (y/y) versus 2024.
- Durban increased by **↑3%** (m/m), but is down by **↓13%** (y/y) versus 2024.
- Consequently, calendar year international air cargo for 2025 was up by **↑4,5%** (y/y) versus 2024.

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

Figure 10 – International cargo for OR Tambo – volumes per month (kg millions)



Calculated from ACOC. Updated: 22/01/2026.

Operationally, ACSA has shared an update on its Freight Warehouse Refurbishment Project at OR Tambo International Airport, outlining a significant **R332 million investment** to refurbish and modernise the existing cargo warehouse facilities. The project covers approximately **43,800 m² of warehouse and office space**. It focuses primarily on regulatory compliance, including fire protection systems, building services, and structural upgrades, alongside improvements to efficiency through modern building management systems. A key component is the reconfiguration of cargo access gates to reduce congestion and improve traffic flow. Construction is scheduled to commence in March 2026, with completion targeted for December 2027, and some operational disruption is expected during implementation.

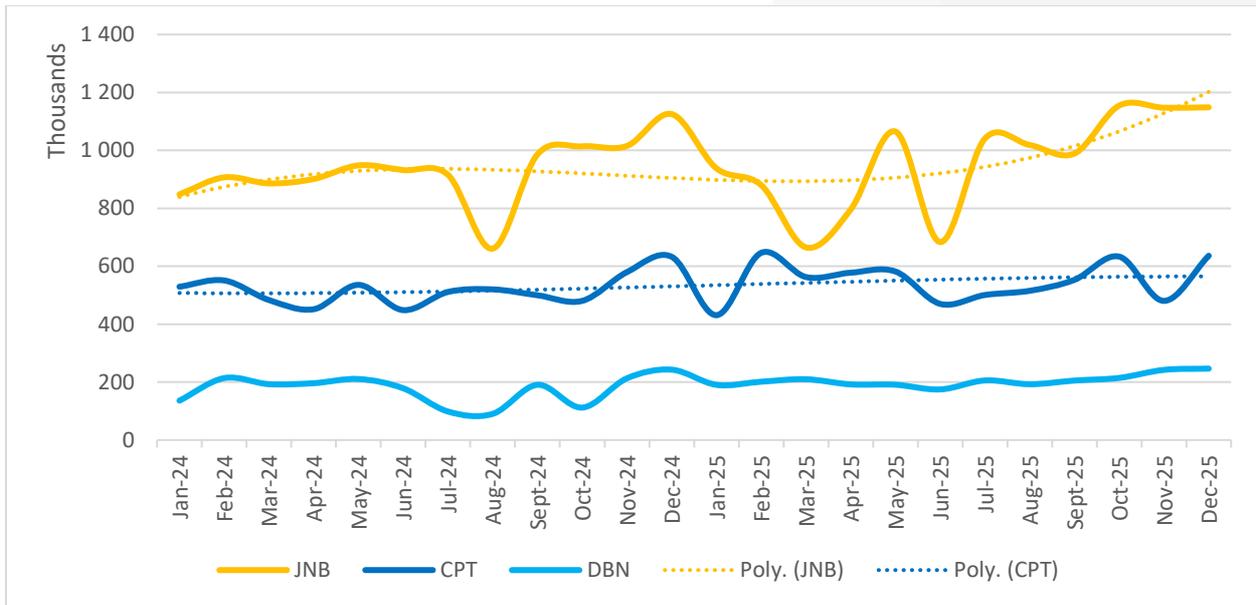
b. Domestic air cargo

For the whole month of December, domestic volumes handled at our three main terminals increased slightly for the month and remain up on last year’s volumes:

- Johannesburg was similar to November (**↑0,1%**, m/m), and is up by **↑2%** (y/y) versus 2024.
- Cape Town increased by **↑32%** (m/m) and by **↑1%** (y/y) versus 2024.
- Durban increased by **↑2%** (m/m) and is also up by **↑2%** year-on-year.
- Consequently, calendar year domestic air cargo for 2025 was up by **↑5,9%** (y/y) versus 2024.

The following figure shows the movement since the start of last year:

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 22/01/2026.

3. Road and Regional Update

a. Lebombo border post update

In the last week (5 to 11 January), movements increased slightly for heavy-goods vehicles.

- Truck volumes through the border post increased to around **1,333 HGVs per day (↑2%, w/w)**.
- Queue times increased to an average of **~3,4 hours (↑21%)** at the border.
- The average processing times also increased to an average of **~3,4 hours (↑28%)** per crossing.

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

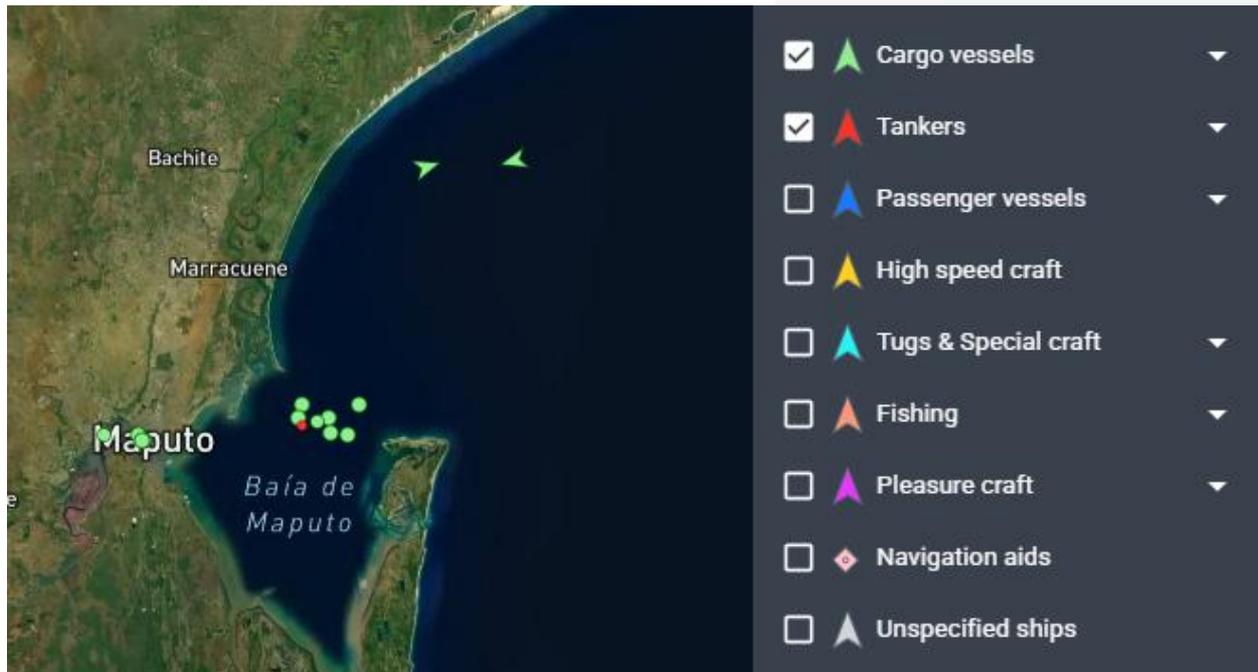
Table 5 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1 333	1 348	1 025	178	35	62	43	229
% (w/w)	2%	9%	4%	11%	-29%	16%	15%	24%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 18/01/2026.

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

Figure 12 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 18/01/2026 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 December:

Table 6 – HGVs – Main South African borders (both directions)

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	16 053	-4%	7 914	-26%	23 967	-13%
Groblersbrug	7 166	-5%	5 356	-12%	12 522	-8%
Kopfontein	6 338	-4%	1 293	94%	7 631	5%
Lebombo	35 817	-13%	35 049	-13%	70 866	-13%
Ramatlhabama	5 684	-12%	2 039	-6%	7 723	-10%
Skilpadshek	8 755	-14%	1 848	-16%	10 603	-14%

Source: TLC & FESARTA, 20/01/2026.

Heavy goods vehicle (HGV) traffic through South Africa’s main border posts dropped by **↓12%** (m/m), driven primarily by the reduction of trade over the Festive Season. Northbound traffic (Eastbound for Lebombo) decreased across the board, with the total reductions evident at **Beitbridge (↓13%)**, **Lebombo (↓13%)**, and **Skilpadshek (↓14%)**.

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

- Overall, the average queue time decreased by **10 minutes** from last week, while transit time decreased by about **half an hour**.
- The median border crossing times at South African borders decreased by more than **an hour and a half**, averaging **~6,9 hrs (↓19%)** for the week.

- In contrast, the greater SADC region (excluding South African-controlled) decreased by more than **half an hour**, averaging **~4,8 hrs**.
 1. **Democratic Republic of Congo (DRC):**
 - a. The Congolese government imposed a nationwide ban on artisanal mining approximately one month ago, triggering sustained protests in key mining regions.
 - b. Unrest reportedly resulted in the death of one Zambian truck driver and five Congolese miners, with more than 80 arrests recorded.
 - c. Transporters were advised to caution drivers operating around Likasi, Fungurume, and Kolwezi due to heightened security risks.
 - d. During the past week, the government indicated that the issue would be resolved imminently; shortly thereafter, the ban was **partially lifted**, conditional on mining companies bringing operations into regulatory compliance.
 - e. Ongoing riots along the Kolwezi–Lubumbashi corridor led to a temporary closure of this strategic route.
 - f. As of mid-week, reports suggest that calm has returned and mining operations have resumed under normal conditions.
 2. **Zambia / Tanzania corridor (road transport charges):**
 - a. It was noted that Road Transport and Safety Agency (RTSA) toll fees for Tanzanian-registered trucks are reportedly set at USD 16 per 100 km, compared to USD 10 per 100 km for trucks from other countries.
 - b. FESARTA has formally engaged RTSA on this apparent differential treatment; further updates are expected pending a response.
 3. **Botswana–South Africa border:**
 - a. On 6 January, a protest occurred at **Ramatlabama** Border Post, reportedly linked to a lack of electricity supply, with potential implications for cross-border movements.

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

Table 7 – Delays⁸ summary – South African borders⁹ (both directions)

Border Post	Direction	HGV ¹⁰ 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	329	22,1	5,2	22,1	9 870	2 303
Beitbridge	Zimbabwe-SA	252	9,6	2,2	9,4	7 560	1 764
Groblersbrug	SA-Botswana	180	11,0	2,0	11,0	5 400	1 260
Martin’s Drift	Botswana-SA	136	12,8	1,4	12,5	4 080	952
Kopfontein	SA-Botswana	80	5,9	1,2	5,6	2 400	560
Tlokweng	Botswana-SA	22	0,7	0,2	0,4	660	154
Vioolsdrift	SA-Namibia	30	3,9	1,3	4,1	900	210
Noordoewer	Namibia-SA	20	1,9	1,0	2,1	600	140
Nakop	SA-Namibia	30	2,3	0,5	2,2	900	210
Ariamsvlei	Namibia-SA	20	0,9	0,3	0,6	600	140
Skilpadshek	SA-Botswana	116	3,5	1,3	3,3	3 480	812
Pioneer Gate	Botswana-SA	25	0,0	0,0	0,0	750	175

⁸ 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.

⁹ Note: From this week onwards, bi-directional flows through the Ramatlabama border post between South Africa and Botswana has been added.

¹⁰ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Border Post	Direction	HGV ¹⁰ Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Ramatlhabama	SA-Botswana	70	3,8	1,3	3,5	870	203
Ramatlhabama	Botswana-SA	29	0,5	0,2	0,3	2 100	490
Lebombo	SA-Mozambique	1 301	3,4	0,5	3,2	39 030	9 107
Ressano Garcia	Mozambique-SA	1 283	2,5	0,2	2,3	38 490	8 981
Sum/Average		3 923	5,3	1,2	5,1	117 690	27 461

Source: TLC, FESARTA, & Crickmay, week ending 11/01/2026.

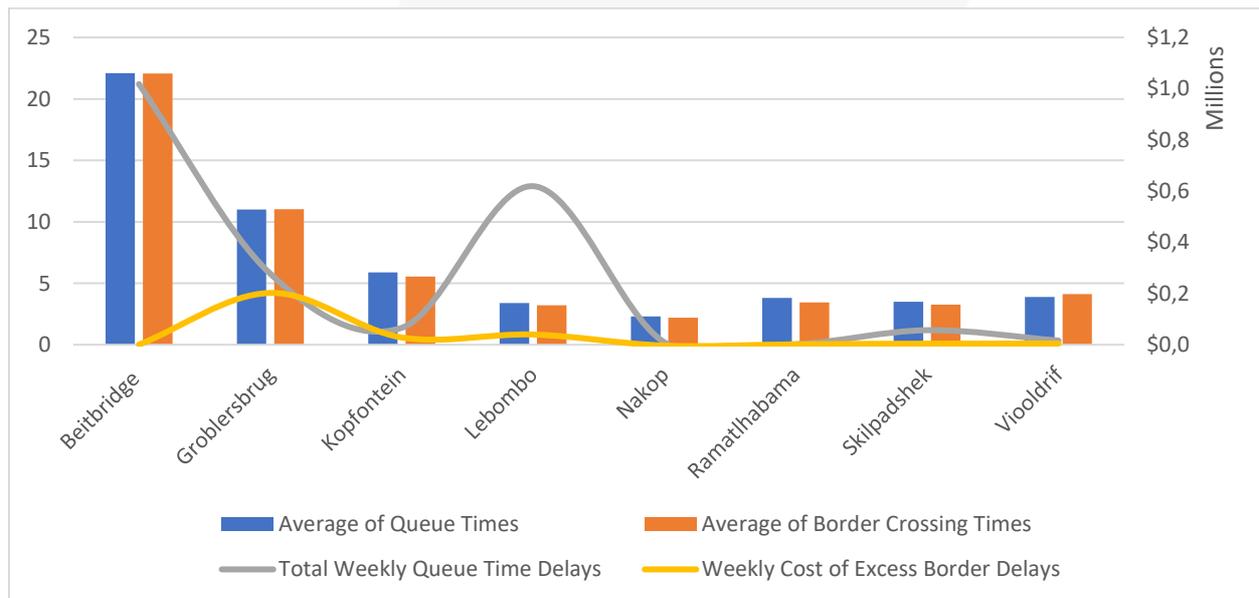
Table 8 – Delays summary – Corridor perspective

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	11,6	2,4	11,4	9 600	2 240
Central Corridor	798	0,3	0,1	0,3	23 940	5 586
Dar Es Salaam Corridor	1 819	15,2	1,4	15,0	0	0
Maputo Corridor	2 584	3,0	0,4	2,8	77 520	18 088
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	2 854	10,9	1,6	10,8	85 620	19 978
Northern Corridor	2 817	0,2	0,0	0,2	92 520	21 588
Trans Caprivi Corridor	372	2,2	0,6	2,1	11 160	2 604
Trans Cunene Corridor	100	2,3	0,8	2,2	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700
Trans Oranje Corridor	116	16,0	3,5	15,8	3 480	812
Sum/Average	12 007	5,1	0,8	5,1	313 650	73 185

Source: TLC, FESARTA, & Crickmay, week ending 11/01/2026.

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

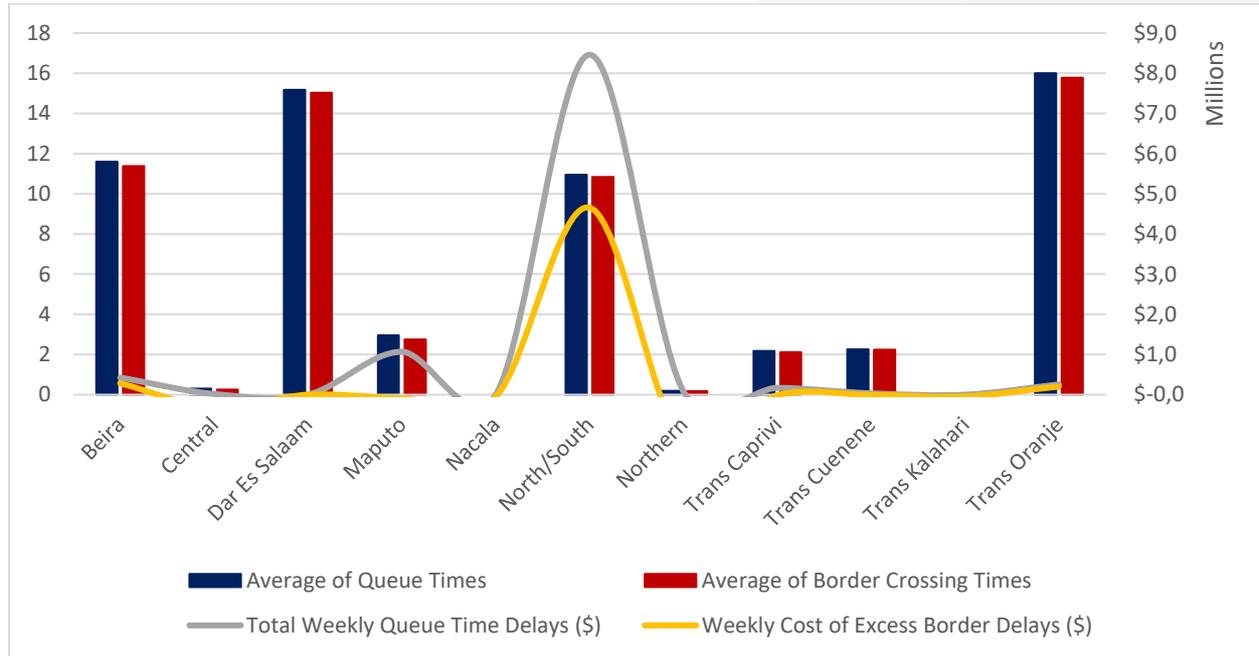
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 11/01/2026.

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

Figure 14 – Weekly cross-border delays & estimated cost from a corridor perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 11/01/2026.

In summary, cross-border queue time averaged **~5,1 hours** (down from the previous week's **~5,2 hours**), indirectly costing the transport industry an estimated **\$10,5 million (R178 million)**. Furthermore, the week's average cross-border transit times also hovered around **~5,1 hours** (down by **~0,5 hours** from the **~6,1 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$3,4 million (R56 million)**. The total indirect cost for the week amounts to an estimated **~\$13,9 million (R229 million)**, down by **↓42%** from the **~R392 million** in the previous report).

4. International Update

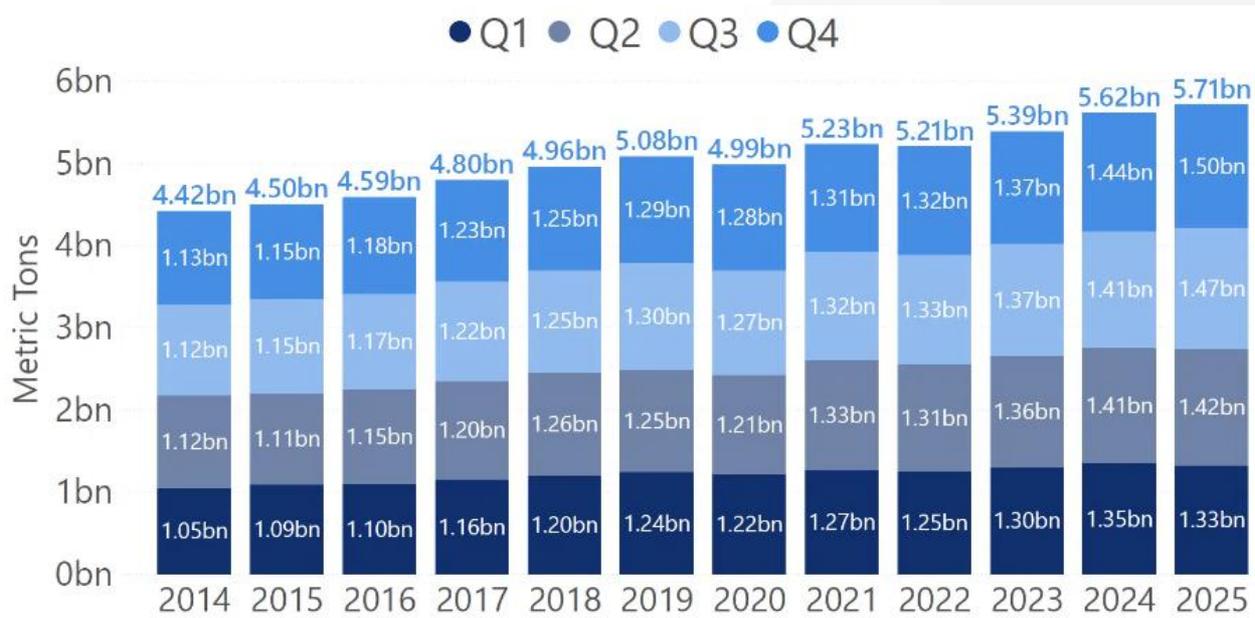
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Global dry bulk overview and outlook

According to AXS Marine, global seaborne dry bulk trade reached a **new historical high of 5,7 billion metric tons in 2025**, a **↑1,7% increase** on 2024, extending a long-term upward trend. Growth was concentrated in the second half of the year, with Q3 and Q4 rising strongly. Iron ore remained the largest cargo, while bauxite shipments surged over 20%. Coal and some agricultural grains declined. Steel, steel products, fertilisers, and nickel ore also contributed to overall growth, with notable variations across commodities and vessel segments.

Figure 15 – Global Dry Bulk Flows (metric tons)



Source: [AXS Marine](#)

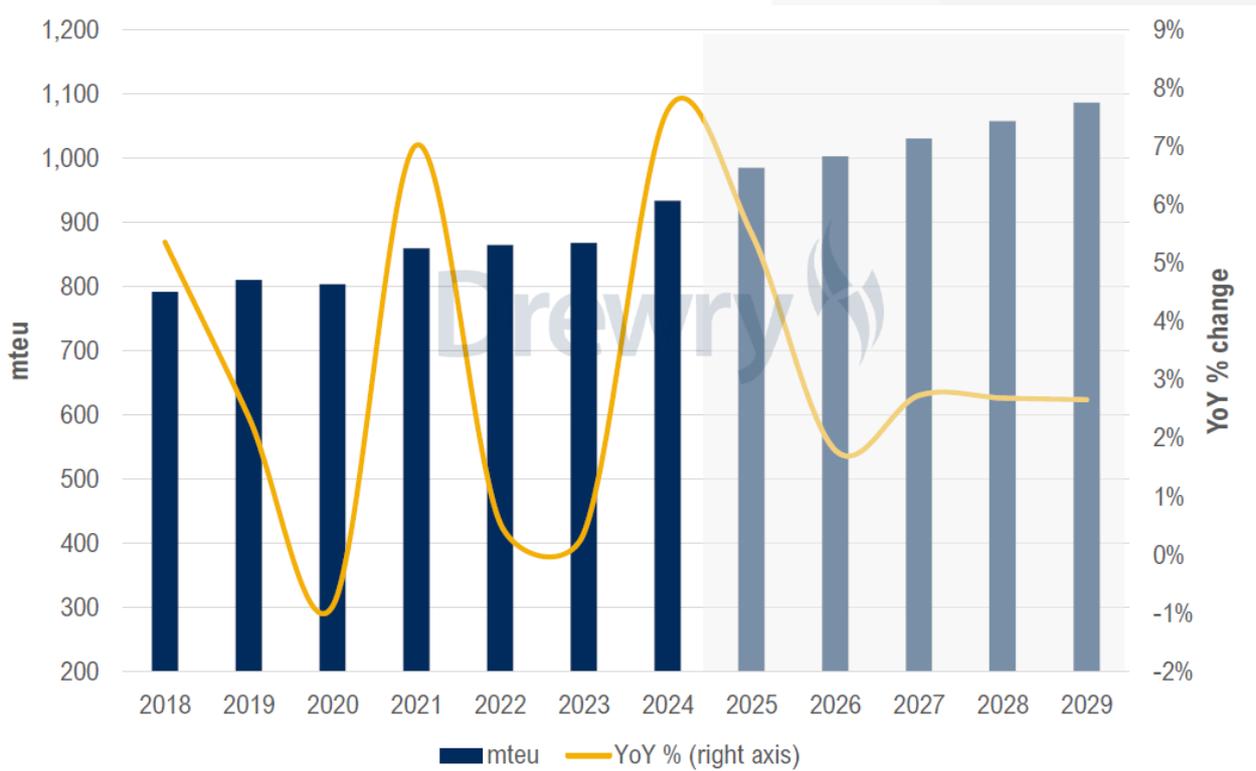
For South Africa, the analysis highlights **continued strength in iron ore export volumes**, reinforcing the country’s role as a key supplier to global dry bulk markets. At the same time, **coal shipments are noted as being under pressure**, reflecting both softer global demand dynamics and ongoing domestic logistics constraints, particularly on rail and port corridors. Together, these trends underscore the uneven performance across South Africa’s bulk commodity exports despite record global dry bulk flows.

ii. **Container industry outlook for 2026 and summary**

Based on Drewry’s latest *Container Market Outlook 2026* for January, the container shipping industry is entering a phase of **slower demand growth alongside persistent overcapacity**.¹¹ Global container port throughput is estimated to have grown by **↑5,5% in 2025**, but is expected to decelerate sharply to **around ↑1,8% in 2026**, before stabilising at **↑2–3% thereafter**. On the supply side, fleet growth continues to outpace demand, with only a temporary slowdown in 2026 before accelerating again from 2027 due to a record orderbook. A gradual return to Suez Canal transits is Drewry’s base case, likely exerting further downward pressure on freight rates. As a result, freight rates and carrier profitability are forecast to decline materially in 2026, while shippers prioritise cost competitiveness, service reliability, and resilience.

¹¹ Drewry. 20/01/2026. [Drewry Webinar - Container Market Outlook Jan 2026](#).

Figure 16 – World port throughput (2018-2029 forecast, million TEU)



Source: [Drewry](#)

Elsewhere in the industry, recent Alphaliner AIS-derived data indicate that despite publicity around a Suez return, overall container ship transits through the Suez Canal have declined year-on-year, with larger vessels still largely avoiding the route and traffic recovery remaining uneven across vessel sizes.¹² Concurrently, liner services eye a fuller return to Suez transits, prompting concerns over port congestion in North European and Mediterranean gateways as deleted calls are reinstated nearly simultaneously.¹³ Meanwhile, ocean spot freight rates are under pressure as blank sailings ahead of the Chinese New Year contribute to rate declines on major Asia-North America and Asia-Europe trades.¹⁴

iii. Global freight rates

Over recent weeks, Drewry’s “World Container Index (WCI)” has shown notable volatility: after rising sharply — including a **↑16%** increase to about **\$2,557/40-ft container** driven by carrier rate hikes on key Transpacific and Asia-Europe trades across the last week three weeks — the index subsequently eased this week, falling around **↑4,4%** (or **\$112**) to approximately **\$2 445 per 40-ft container**¹⁵, as weaker spot rates emerged on the same major trade routes. This sequence reflects an underlying tug-of-war between opportunistic pricing by carriers and demand-related softness in the spot market. Elsewhere, the charter market remains stable, with the *Harpex Index* trading at **2,182 points**.¹⁶ The following shows the index since the start of 2024:

¹² Alphaliner. 16/01/2026. [2026 starts with vessel idling firmly below 1%](#).

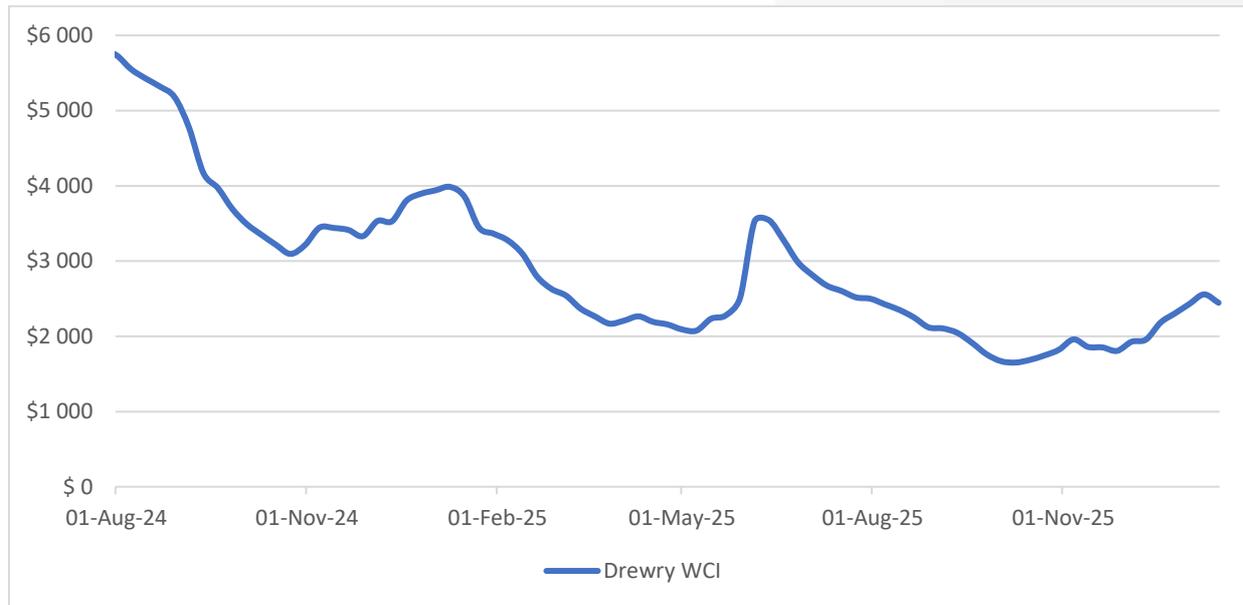
¹³ Van Marle, G. 19/01/2026. [Return to Suez: major challenges for North Europe and Mediterranean.](#)

¹⁴ Van Marle, G. 16/01/2026. [Ocean spot rates feel the pressure as CNY blankings are unveiled.](#)

¹⁵ Drewry. 15/01/2026. [World Container Index.](#)

¹⁶ Harpex. 09/01/2026. [Harper Petersen Charter Rates Index.](#)

Figure 17 – World Container Index (WCI)



Source: Calculated from [Drewry](#)

b. Global air cargo industry

According to high-frequency metrics from World ACD, global air cargo markets recorded a pronounced post-holiday rebound in early January, although volumes and pricing dynamics remain mixed. Worldwide chargeable weight rose sharply week-on-week (**↑26%**), reversing the typical year-end contraction, yet tonnages remain around **↓20%** below mid-December peaks. On a year-on-year basis, global chargeable weight is approximately **↑5%** higher, with growth led by Asia Pacific, Middle East and South Asia (MESA), and North America, indicating a continuation of structurally resilient demand lanes.

Figure 18 – Capacity, chargeable weight, and rates (past two to five weeks)

Origin Regions
last 2 to 5 weeks



Origin Region	Capacity ¹			Chargeable weight ¹			Rate ¹		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-11%	+3%		-20%	-5%		+2%	+8%
Asia Pacific		-7%	+5%		-17%	+6%		-7%	-1%
C. & S. America		-6%	+10%		-15%	+7%		-1%	-4%
Europe		-8%	+9%		-38%	-6%		-3%	+2%
M. East & S. Asia		-2%	+8%		+1%	+14%		-4%	-16%
North America		-4%	+3%		-15%	+4%		+1%	-2%
Worldwide		-6%	+5%		-20%	+4%		-4%	-1%

Source: [World ACD](#)

Despite the volume recovery, yields remain under pressure. Average global rates eased further to around **\$2,46/kg**, down roughly **↓10%** from mid-December levels, although marginally above last year's equivalent. Spot rates followed a similar trajectory, declining week-on-week and year-on-year, particularly ex-Asia Pacific and MESA, reflecting returning capacity and softer pricing power. Overall, the market shows improving cargo fundamentals but limited near-term upside for rates, as capacity normalisation continues to outpace yield recovery.

ENDS ¹⁷

¹⁷**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.*