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Cargo Movement Update #266[1]

Date: 25 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)	28 463	32 428	**60 891**	24 753	28 201	**52 954**	**↑15%**
Air Cargo (tons)	3 948	2 190	**6 138**	3 184	1 941	**5 126**	**↑20%**

Monthly Snapshot

Figure 1 – Cyclical[4] monthly cargo volume, year on year (most metrics: Dec '24 vs Dec '25, % growth)

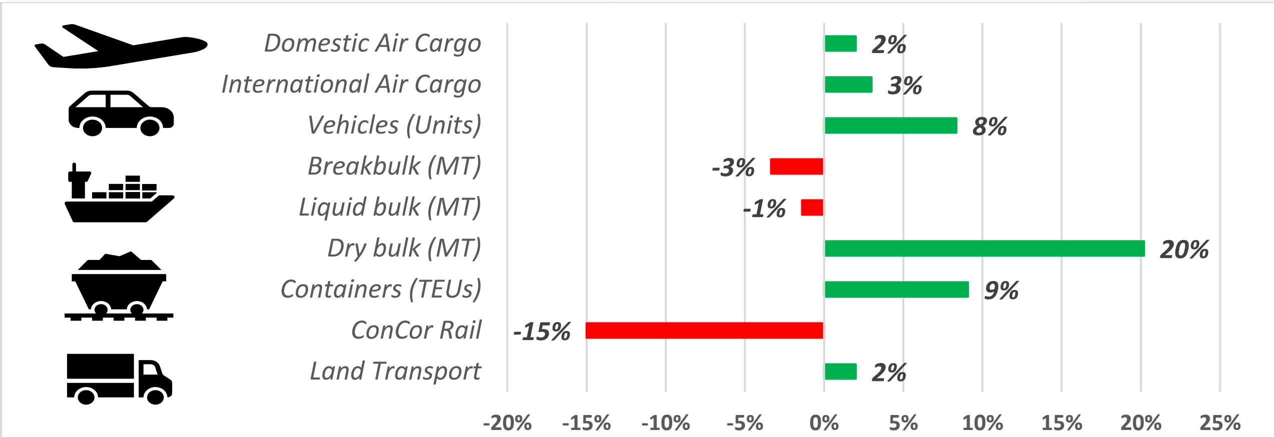
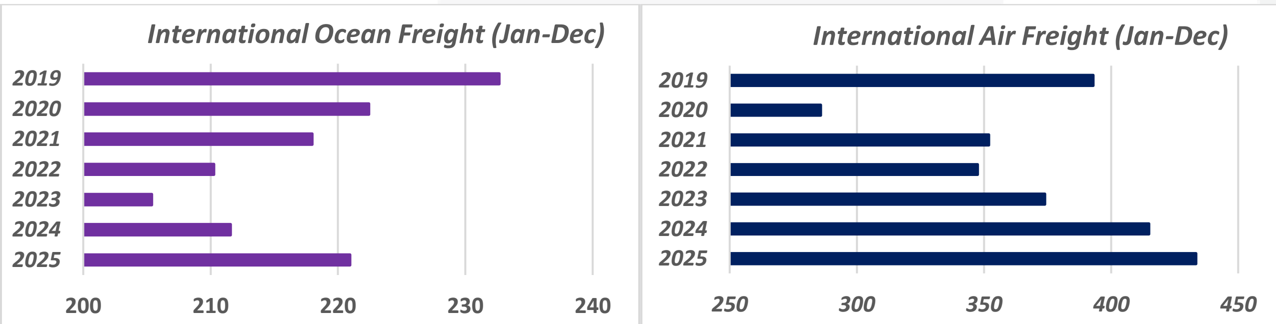


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **8,699**[6] **TEUs** were handled per day, with **7,165 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **4,114** containers, up by **↑28%** from last week.
- Cross-border queue: **↓0,2**; transit: **↓0,3 hrs**; SA borders: **~7,9 hrs** (**↑15%**); SADC: **~4,4 hrs** (**↓8%**).
- Global schedule reliability declined by **↓1,2%** to **62,8%** (m/m; still **↑9%**, y/y). Ave. late arrivals: **~5 days**.
- Carrier strategies & CNY continue to influence rates, as the *WCI* is down by **↓9,5%** to **$2,212/40-ft**.
- Worldwide chargeable air cargo is up by **↑11%** (w/w) and **↑5%** (y/y). Rates are at **$2,41/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 *266th* 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 *third 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 **8,699 TEUs** was handled daily, an increase from **7,565 TEUs** the previous week.

Port operations, though still challenged by weather conditions in some instances, showed a strong recovery, with vessel delays reducing and waterside operations increasing. Equipment availability remained steady throughout the week, with most terminals reporting a near full complement of cranes and a strong support of landside equipment.

Globally, container shipping conditions softened further this week. Sea-Intelligence reports that schedule reliability slipped to **62,8%** month-on-month, with average delays widening to just over **five days** (although performance remains materially stronger year-on-year and select alliances continue to outperform). Routing patterns remain fluid, with renewed **Cape of Good Hope diversions** reflecting security concerns in the Red Sea and raising **congestion risks** for **North European** and **Mediterranean gateways** should Suez transits resume at scale. Scrubber adoption has plateaued at roughly **42% of global capacity** as fuel spreads narrow and regulatory pressures intensify. Freight markets weakened materially, with Drewry's *WCI* falling **↓9,5%** week-on-week amid post-Chinese-New-Year demand softness, while charter rates remained broadly stable.

International air cargo to and from ORTIA (which handles about **87% of total international cargo**) is starting to pick up nicely as January progresses. The daily average of international air cargo handled amounted to **~564,000 kg** inbound (**↑24%**, w/w) and **~313,000 kg** outbound (**↑13%**). Consequently, because of the increase, the current levels are now above last year's level (**6%**) and the comparative levels of pre-pandemic January 2020 (**↑5%**). Operationally, ORTIA's seven-day *Echo Taxilane* repair will temporarily constrain wide-body stand availability and raise towing and remote-gate complexity. Still, simulations indicate that all scheduled services – including air cargo – can be accommodated through mitigation measures, with freight operations expected to remain unaffected.

Global air-cargo volumes rebounded sharply in mid-January, with worldwide chargeable weight up **↑11%** week-on-week and about **↑5%** year-on-year, even as capacity continued to expand faster at roughly **↑9%** (y/y). Rates appear to have stabilised and begun edging higher to around **$2,41/kg**, but remain uneven across regions and, in several key Asia-Pacific lanes, below last year's levels. In other aviation news, widespread flight cancellations across the US and Canada this past weekend are likely to disrupt scheduled belly and truck-feeder connectivity, constraining cargo lift and throughput on key North American trade corridors.

On the N4 corridor, movements increased slightly for heavy-goods vehicles. Truck volumes through the border post increased to around **1,368 HGVs per day** (**↑3%**, w/w). Queue times decreased to an average of **~2,4 hours** (**↓29%**) at the border. The average processing times also decreased to an average of **~2,2 hours** (**↓31%**) per crossing.

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 **15 minutes**. The median border crossing times at South African borders, on the other hand, increased by **an hour**, averaging **~7,9 hrs** (**↑15%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased by more than **half an hour**, averaging **~4,4 hrs** (**↓8%**). This week, on average, two SADC borders took around a day to cross, namely Beitbridge and Kasumbalesa (taking **around two days** from the **Zambian side**). Cross-border developments this week included **(1)** Hazmatrelated disruptions following a tanker accident on the Pongola–Piet Retief corridor, **(2)** operational pressures at Beitbridge and Chirundu stemming from abnormal passenger flows, weighbridge non-compliance and scanner failures, and **(3)** renewed congestion and industry resistance in the DRC after the reinstatement of a $100 truck-scanning charge at Kanyaka.

In concluding the third edition, we bring our attention to the US amid the continued strength of the Dollar-exchange. The US House has approved only a one-year, retroactive renewal of AGOA through December 2026 after multi-year negotiations collapsed, preserving short-term duty-free access for African exports but prolonging policy uncertainty that is likely to weigh on South African trade flows, exporter investment decisions, and medium-term planning across port, shipping, and logistics networks. Lastly, some news from Davos - where the WEF is taking place - Transnet signed an MoU with Port of Antwerp-Bruges International and APEC to modernise South Africa's ports through cooperation on digitalisation, sustainability, corridor development, training, and EU Global Gateway–linked investment, with implementation overseen by a joint monitoring committee.

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 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, and DGT data is therefore not currently reflected in this section of the report. This absence is noted with concern. A renewed and time-sensitive appeal is made to DGT leadership to revisit this position, as the routine sharing of non-confidential throughput data is foundational to system-wide transparency, evidence-based coordination, and the performance gains recorded across South Africa's logistics network over the past 18 months.

Table 2 – Container Ports – Weekly flow reported for 19 to 25 January (measured in TEUs)

7-day flow reported (19/01/2026 – 25/01/2026)			
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)	2 271	15 898	↑125%
Cape Town Container Terminal	2 505	17 532	↑5%
Ngqura Container Terminal	2 397	16 776	↓9%
Port Elizabeth Container Terminal	820	5 741	↓24%
Other	706	4 944	↑52%
Total	**8 699**	**60 891**	**↑15%**

Source: Calculated from TPT, 2026. Updated 25/01/2026.

An average of **~8,699 TEUs** (↑15%) was handled per day for the last week (*19 to 25 January, Table 2*). Consequently, throughput was above the projected average of **~6,840 TEUs** (↑27% actual versus projected). For the coming week, a decreased average of **~ 7,165 TEUs** (↓18%) is predicted to be handled (*26 January to 1 February*, *Table 3*).

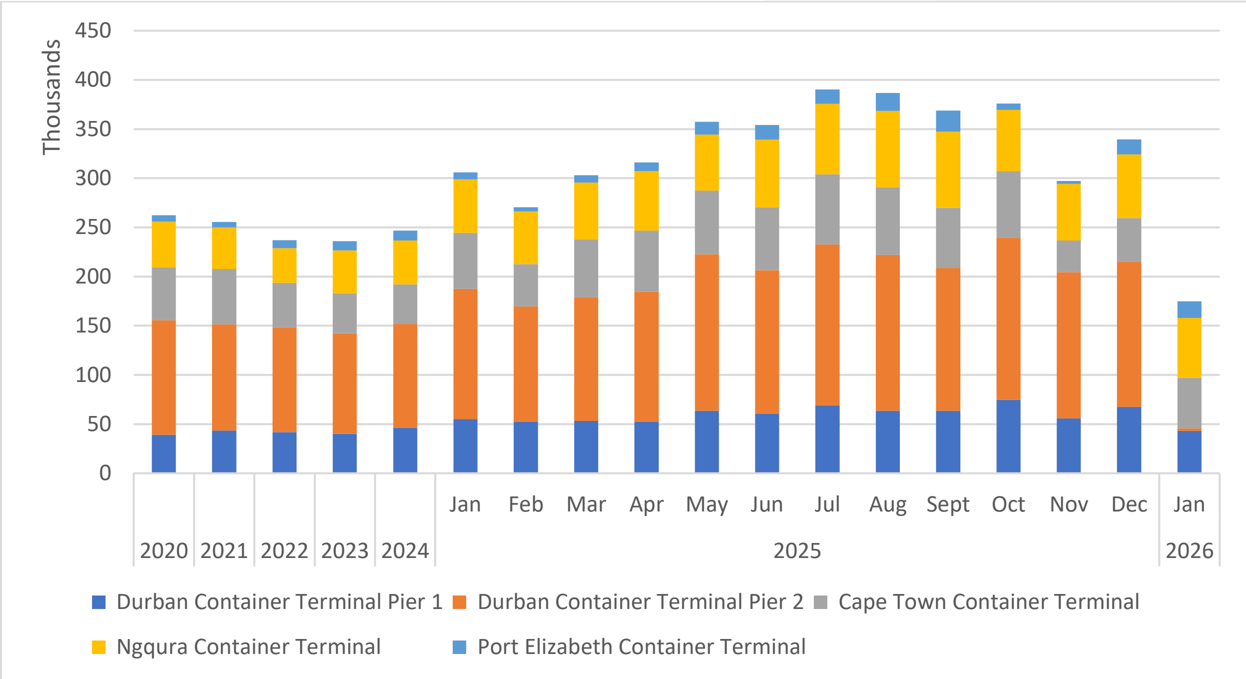
Table 3 – Container Ports – Weekly flow projected for 26 January to 1 February (measured in TEUs)

7-day flow projected (26/01/2026 – 01/02/2026)			
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)	1 897	13 277	↓16%
Cape Town Container Terminal	1 910	13 373	↓24%
Ngqura Container Terminal	1 945	13 617	↓19%
Port Elizabeth Container Terminal	366	2 561	↓55%
Other	1 047	7 329	↑48%
Total	**7 165**	**50 157**	**↓18%**

Source: Calculated from TPT, 2026. Updated 25/01/2026.

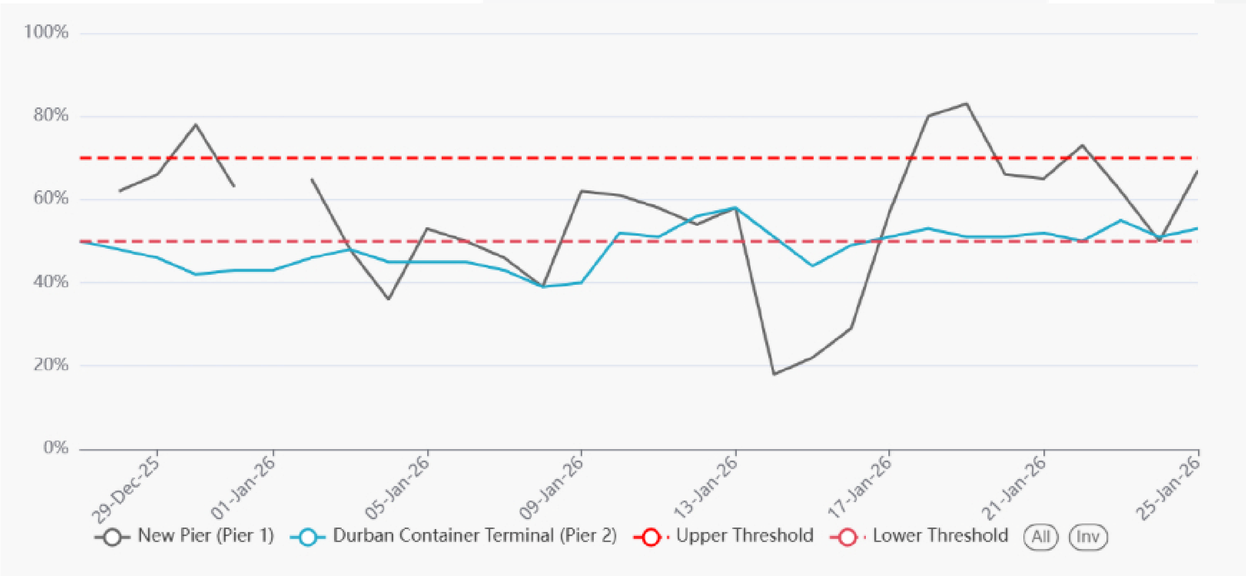
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2026, and updated 25/01/2026.

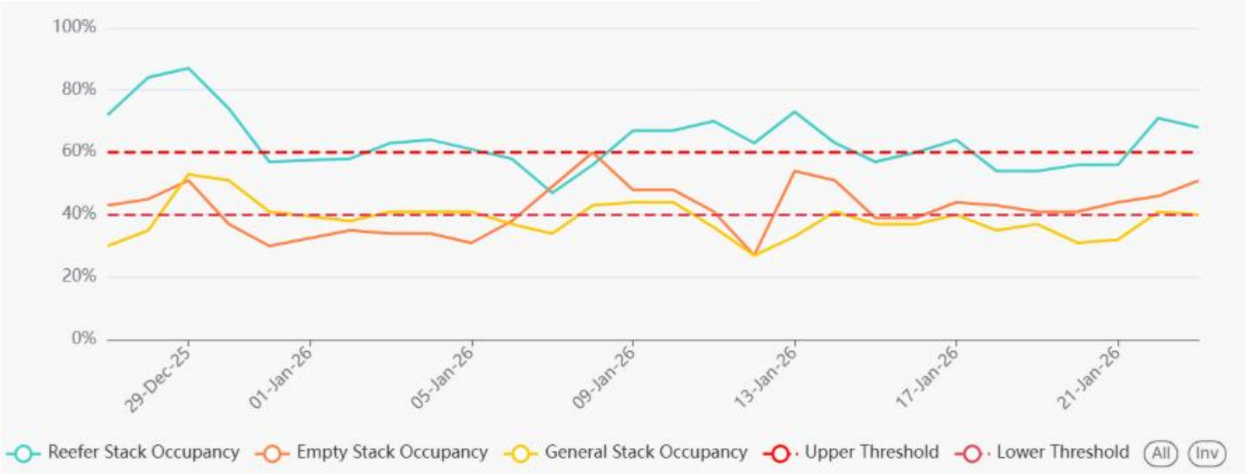
Figure 4 – Stack occupancy in DCT, general-purpose containers (29 December to present; day on the day)



Source: Calculated using data from Transnet, 2026, and updated 25/01/2026.

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 (29 December to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 25/01/2026.

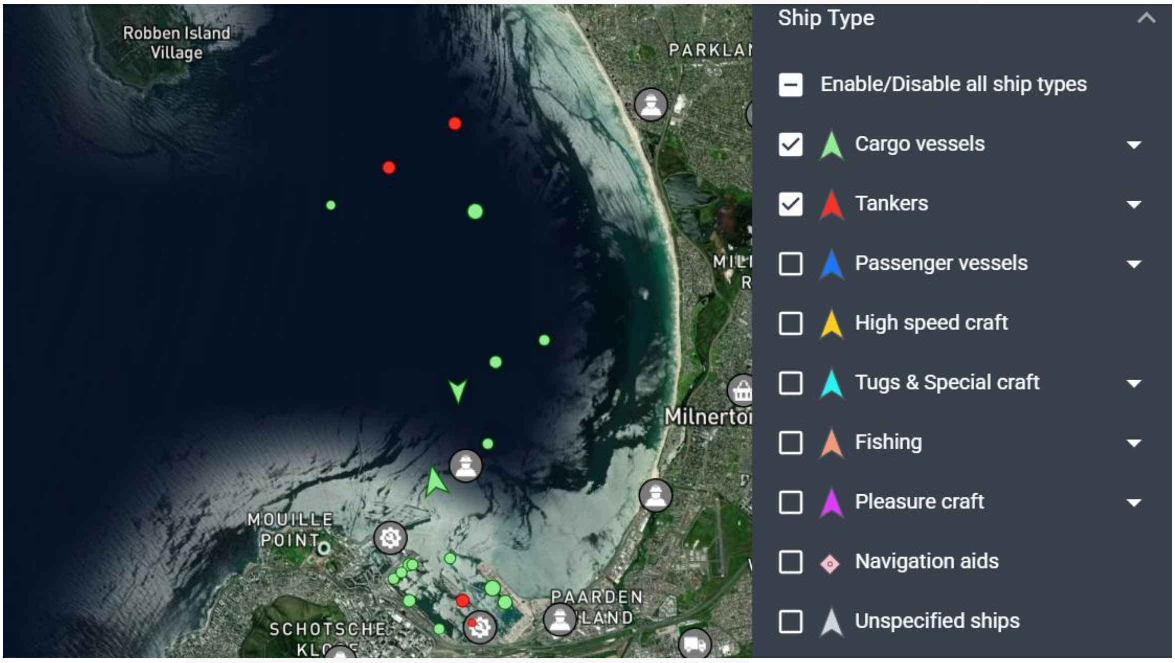
b. Summary of port operations

i. Cape Town

Though CTCT started the week with poor weather conditions (being windbound most of Monday and Tuesday), the terminal managed to make up for some delays, with just one vessel waiting at anchorage by the end of the week, and berthing delays slowly reducing. As with the previous week, CTCT reported steady equipment availability, with 8 out of 9 STS cranes available for most of the week, and 28 out of 31 RTGs. Apart from the weather conditions, no challenges were reported.

Cape Town Multi-Purpose Terminal had a quiet week, with one vessel at berth and minimal delays or equipment breakdowns reported.

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



Source: Marine Traffic. Updated 25/01/2026 at 14:00.

ii. Durban

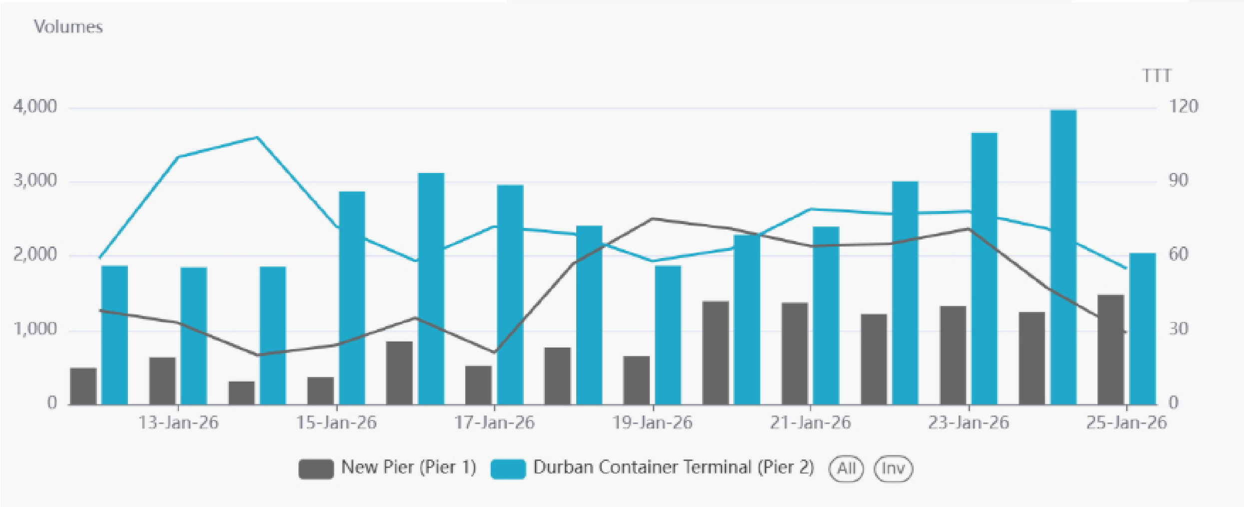
After a few quiet weeks, due to congestion at other South African ports, Durban's Pier 1 had a busier week, with a reduction in empty berths and an increase in volumes, with vessel delays of around one day. However, with the increase in volumes on the landside came an increase in time spent at the port. The **TTT** for the week averaged **~60 minutes** (**↑82%**, w/w), and the average **staging time** was **~67 minutes** (**↑253%**). With regards to equipment, the availability remained consistent with other weeks, reporting five out of seven STS cranes available, and 15 out of 25 RTGs.

The Durban Gateway Terminal had a strong week with waterside operations, moving more than 4,000 TEUs twice in the past week, with an average daily volume of **3,244**. On the landside, the **TTT** for the week averaged **~69 minutes** (**↓10%%**, w/w), and the average **staging time** was **~57 minutes** (**↑8%**). Equipment availability showed a steady supply of 11 out of 15 cranes available. As a result of the stronger performance, the terminal had vessels berthing on arrival (for the most part).

Durban Multi-Purpose Terminal's equipment challenges continued with an average of two or three of the four cranes available; however, as with previous weeks, the low berth occupancy countered the effect, with little to no impact on operations being experienced.

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.

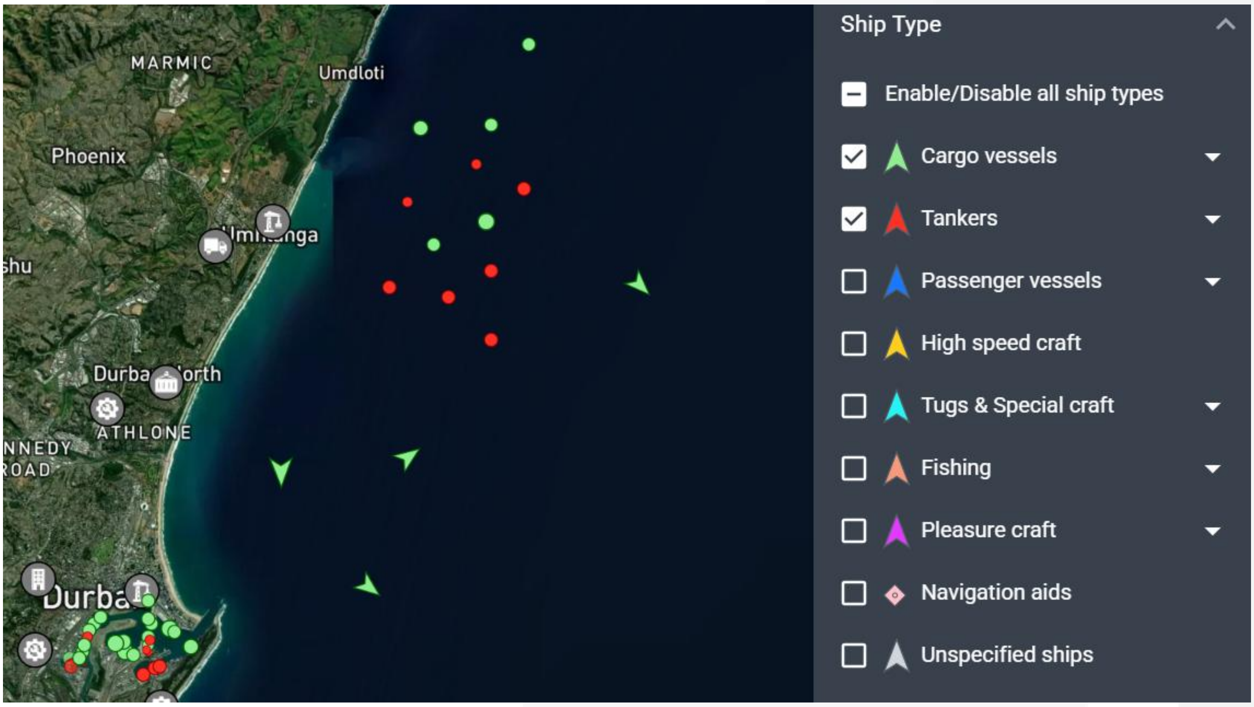
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 25/01/2026.

The queue of container vessels waiting outside Durban increased slightly this week. On Wednesday evening (28 January), **three** container vessels were waiting outside at anchorage – **all** for Pier 1. The queue of dry (**three**), liquid (**four**), and breakbulk (**one**) 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 25/01/2026 at 14:00.

iii. Richards Bay

The daily average coal throughput for the week increased and averaged around **172,000 tons** (**↑4%**, w/w) a day. An average of **23 trains** was serviced on the landside (similar to last week), and slightly above the target (of 22 trains).

iv. Eastern Cape ports

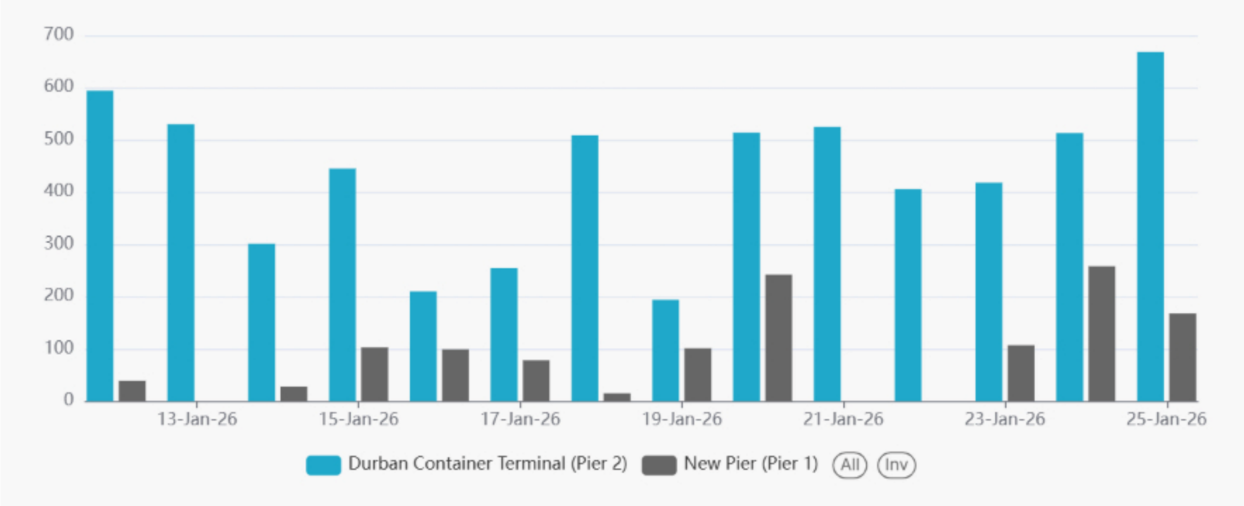
Ngqura Container Terminal had a busy week, with an average of three to four container vessels at anchorage (drifting and in anchorage), with around 20 hours of vessel delays reported for the week. Though from an equipment perspective, the terminal remained steady with seven out of 8 cranes and 24 out of 30 RTGs available throughout the week.

Port Elizabeth Container Terminal reported a somewhat slower week, especially on waterside operations, partially due to one of the terminal's STS cranes being out for planned maintenance (scheduled from 19 January to the end of March). The terminal reported one vessel at anchorage towards the middle of the week, but by the weekend, the terminal had vessels berthing on arrival, recovering quickly from the slower operations.

v. Transnet Freight Rail (TFR)

There was an overhead hook-up at Dargle on the Container Corridor on Tuesday (27 January), resulting in the line closing for 6-8 hours. This caused a backlog of trains stacked on both sides and container stock to build up in Durban and City Deep. TFR gave container trains priority on Wednesday (28 January). The line between City Deep and Mafikeng continues to be affected by a severe shortage of locos, causing serious delays on the route to Botswana.

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



Source: Calculated using data from Transnet, 2025. Updated 25/01/2026.

In the last week (*19 to 25 January*), rail cargo on the ConCor line out of Durban was reported at **4,114** containers, up by **↑28%** from the previous week's **3,206** containers.

vi. Other updates

The US House of Representatives has passed a provision in the fiscal "Minibus" spending bill (HR7148) that *retroactively renews the African Growth and Opportunity Act (AGOA) for one year through 31 December 2026* after multi-year renewal negotiations collapsed due to opposition from the White House and some Republican lawmakers. This short-term extension preserves *duty-free access for eligible sub-Saharan African exports into the US market*, which had lapsed after the act expired on 30 September 2025, but *creates significant uncertainty for trade continuity and long-term investment decisions* in sectors that depend on predictable preferences (e.g., apparel, agriculture, automotive components). For South Africa specifically, continued AGOA eligibility and the policy environment remain contested amid tariff disputes and shifting US political priorities, implying heightened risk for exporters and logistics operators reliant on US market access absent a longer-term framework.

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 (*19 to 25 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

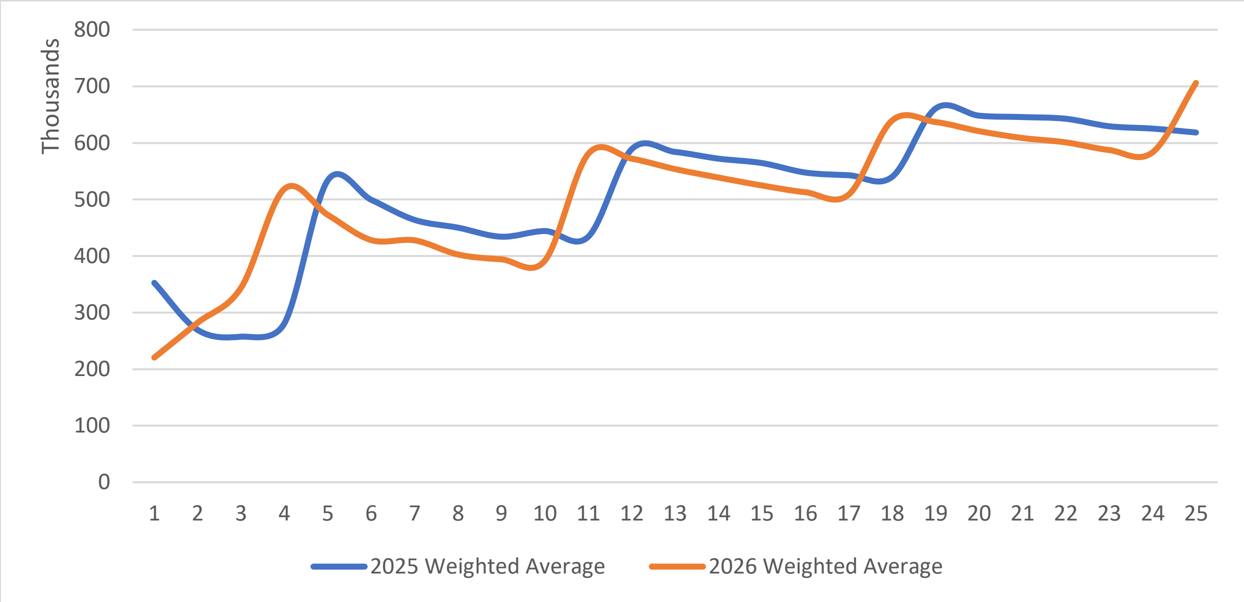
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	564 007	3 948 049	↑24%
Volume outbound	312 790	2 189 528	↑13%
Total	876 797	6 137 577	↑20%

Courtesy of ACOC. Updated: 25/01/2026.

The daily average of international air cargo handled amounted to **~564,000 kg** inbound (**↑24%**, w/w) and **~313,000 kg** outbound (**↑13%**). Consequently, because of the increase, the current levels are now above last year's level (**↑6%**) and the comparative levels of pre-pandemic January 2020 (**↑5%**).

The following figure shows the rolling daily weighted average international air cargo flows to and from ORTIA since the start of the year, with a comparison to the same time last year:

Figure 10 – International cargo for OR Tambo – daily weighted average for January (kg thousands)



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

Operationally, Airports Company South Africa's risk assessment indicates that the seven-day closure of ORTIA's *Echo Taxilane* for pavement remediation will materially constrain airside capacity – reducing allowable **Code F movements to four per day** and increasing towing, remote-stand use, and congestion risk – yet simulations show that all scheduled flights, including cargo operations, can be accommodated with mitigations such as staggered departures, additional bussing, and enforced repositioning rules.

Critically for freight stakeholders, the modelling explicitly concludes that cargo flights will not be disrupted, with operational impacts concentrated on passenger wide-body stand allocation and turnaround complexity during the works.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*19 to 25 January)*, movements increased slightly for heavy-goods vehicles.

- Truck volumes through the border post increased to around **1,368 HGVs per day** (**↑3%**, w/w).
- Queue times decreased to an average of **~2,4 hours** (**↓29%**) at the border.
- The average processing times also decreased to an average of **~2,2 hours** (**↓31%**) per crossing.

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

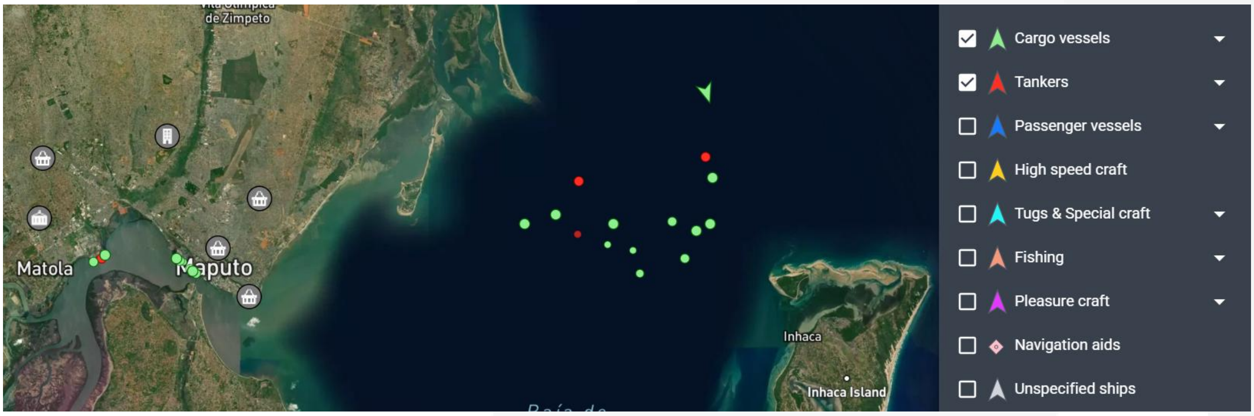
Table 5 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1 368	1 354	988	170	40	76	38	236
% (w/w)	**3%**	**0%**	**-4%**	**-5%**	**11%**	**18%**	**-15%**	**3%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 25/01/2026.

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 25/01/2026 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 **10 minutes** from last week, while transit time decreased by about **15 minutes**.
- The median border crossing times at South African borders, on the other hand, increased by **an hour**, averaging **~7,9 hrs** (**↑15%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased by more than **half an hour**, averaging **~4,4 hrs** (**↓8%**).

1. **Pongola–Piet Retief corridor:**
   a. A tanker crash approximately 50 km from Pongola caused hazardous material spillage, triggering Hazmat protocols and an extensive clean-up operation, resulting in temporary disruption to traffic flows.
2. **Beitbridge passenger traffic:**
   a. The festive season saw a sharp increase in passenger vehicle volumes, followed by elevated return flows after the New Year. Traffic levels are now reportedly normalising.
3. **Weighbridge compliance at Beitbridge:**
   a. Authorities reported repeated attempts by drivers to evade penalties by waiting near the weigh-in-motion (WIM) system in the belief that it would reset, allowing passage without settling outstanding fines.
   b. Monitoring and enforcement have been heightened.

4. **Chirundu (Zimbabwe side) congestion:**
    a. Commercial traffic backed up due to slow scanner processing, reportedly after lightning damage to the equipment.
    b. Stakeholders have requested that scanning be suspended until repairs are completed to alleviate congestion.
5. **Kanyaka (DRC) scanner reinstatement:**
    a. Authorities quietly reintroduced a truck-scanning system with a mandatory $100 fee, previously abandoned last year after industry resistance and severe congestion.
    b. The renewed implementation has again prompted opposition from drivers and transporters, resulting in significant queues and refusals to proceed through the post.

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

Table 6 – 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	459	22,1	6,5	23,4	13 770	3 213
Beitbridge	Zimbabwe-SA	230	9,6	2,4	14,2	6 900	1 610
Groblersbrug	SA-Botswana	234	11,0	1,5	13,5	7 020	1 638
Martin's Drift	Botswana-SA	154	12,8	0,4	2,2	4 620	1 078
Kopfontein	SA-Botswana	196	5,9	1,2	5,4	5 880	1 372
Tlokweng	Botswana-SA	24	0,7	0,2	0,4	720	168
Vioolsdrift	SA-Namibia	30	3,9	2,1	4,2	900	210
Noordoewer	Namibia-SA	20	1,9	0,4	1,3	600	140
Nakop	SA-Namibia	30	2,3	1,2	3,4	900	210
Ariamsvlei	Namibia-SA	20	0,9	0,4	1,0	600	140
Skilpadshek	SA-Botswana	281	3,5	2,0	6,1	8 430	1 967
Pioneer Gate	Botswana-SA	72	0,0	0,0	0,0	2 160	504
Ramatlhabama	SA-Botswana	215	3,8	0,5	5,0	2 550	595
Ramatlhabama	Botswana-SA	85	0,5	0,2	0,4	6 450	1 505
Lebombo	SA-Mozambique	1 325	2,4	0,4	2,2	39 750	9 275
Ressano Garcia	Mozambique-SA	1 316	1,8	0,2	1,5	39 480	9 212
Sum/Average		**4 691**	**5,2**	**1,2**	**5,3**	**140 730**	**32 837**

Source: TLC, FESARTA, & Crickmay, week ending 18/01/2026.

Table 7 – 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	13,5	4,0	13,3	9 600	2 240
Central Corridor	798	1,1	0,4	1,1	23 940	5 586
Dar Es Salaam Corridor	1 819	12,4	1,3	12,4	54 570	12 733
Maputo Corridor	2 641	2,1	0,3	1,8	79 230	18 487
Nacala Corridor	127	0,0	0,0	0,0	3 810	889

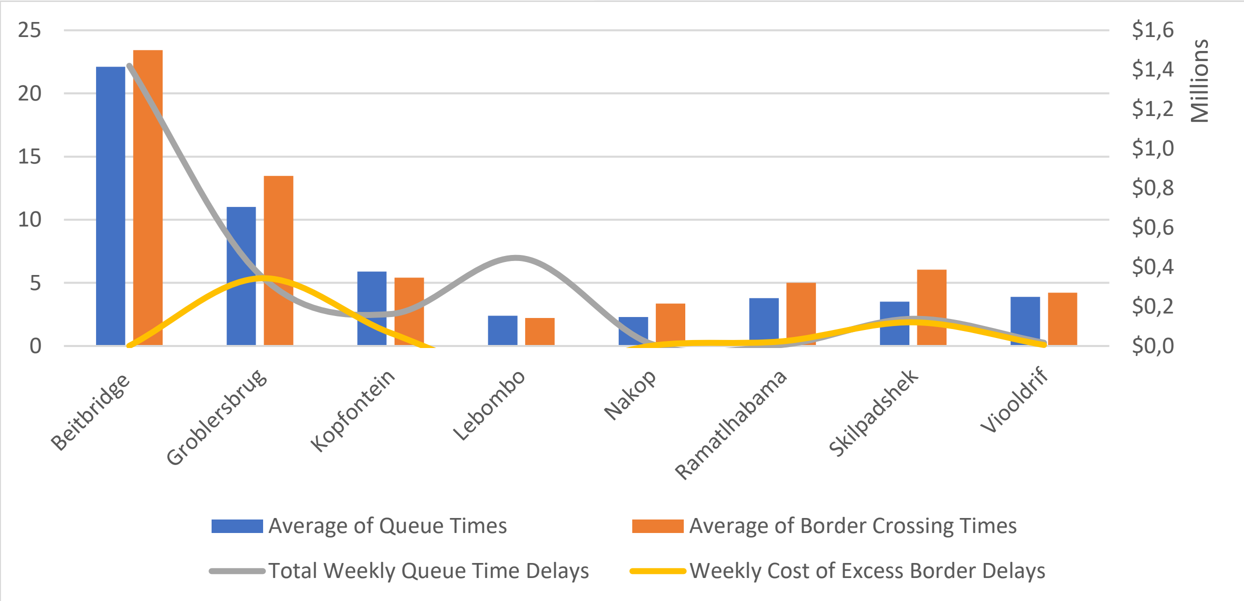
[7] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[8] Note: From this week onwards, bi-directional flows through the 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	3 034	10,4	1,5	9,9	91 020	21 238
Northern Corridor	2 817	0,3	0,1	0,2	92 520	21 588
Trans Caprivi Corridor	903	2,2	0,6	2,8	27 090	6 321
Trans Cunene Corridor	100	2,3	1,0	2,5	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700
Trans Oranje Corridor	116	16,0	2,4	12,0	3 480	812
Sum/Average	**12 775**	**4,9**	**0,8**	**4,8**	**391 260**	**91 294**

Source: TLC, FESARTA, & Crickmay, week ending 18/01/2026.

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

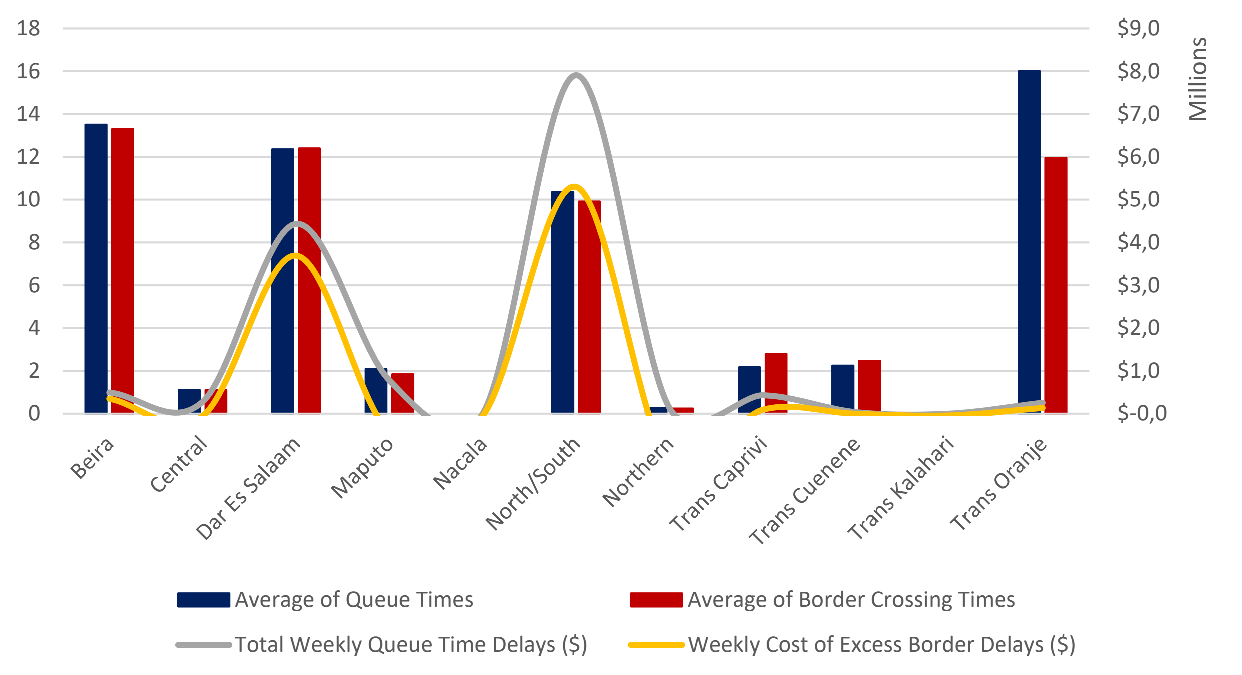
Figure 12 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 18/01/2026.

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: TLC, FESARTA, & Crickmay, week ending 18/01/2026.

In summary, cross-border queue time averaged **~4,9 hours** (down by **~0,2 hours** from the previous week's **~5,1 hours**), indirectly costing the transport industry an estimated **$14,7 million** (**R242 million**). Furthermore, the week's average cross-border transit times also hovered around **~4,8 hours** (down by **~0,3 hours** from the **~5,1 hours** recorded in the previous report), at an indirect cost to the transport industry of **$7,8 million** (**R56 million**). Therefore, despite the decreases in average time, the weighted average increased because of increases at busy borders; the total indirect cost for the week amounts to an estimated **~$22,6 million** (**R371 million**, up by **↑62%** from the **~R229 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.

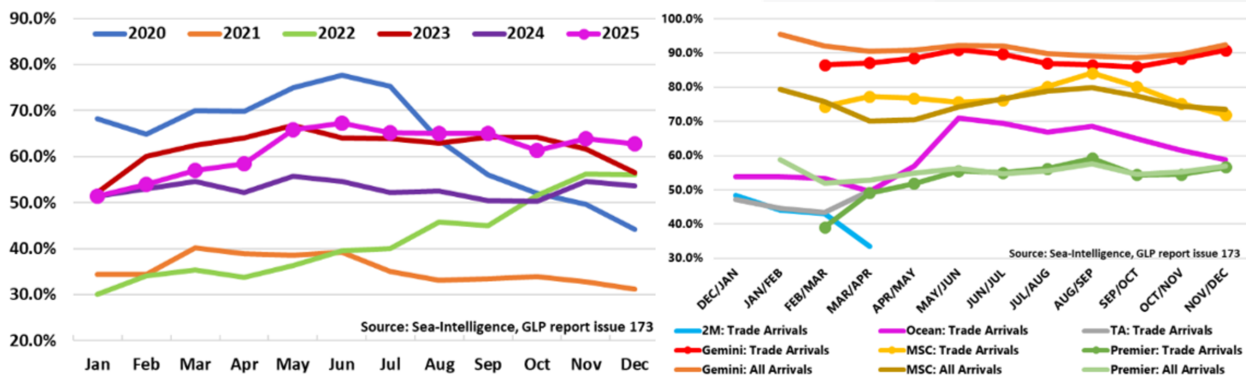
a. Global shipping industry

i. Global schedule reliably and container industry summary

According to *Sea-Intelligence's* Global Liner Performance (GLP) report, global schedule reliability declined month-on-month by **↓1,2%** to **62,8%**, the second-lowest level since May 2025, though still **↑9,0%** higher year-on-year.[10] Average delays for late vessel arrivals increased to **5,04 days** (second–highest since April). Among the top 13 carriers, Maersk (**77%**) and Hapag-Lloyd (**75%**) led in reliability; Wan Hai (**48%**) was lowest. Alliance performance showed Gemini Cooperation above **92%** across all arrivals.

[10] Murphy, A. 26/01/2026. Global schedule reliability drops to 62.8% in December 2025.

Figure 14 – Global Schedule Reliability (%) and Alliance Schedule Reliability (days)

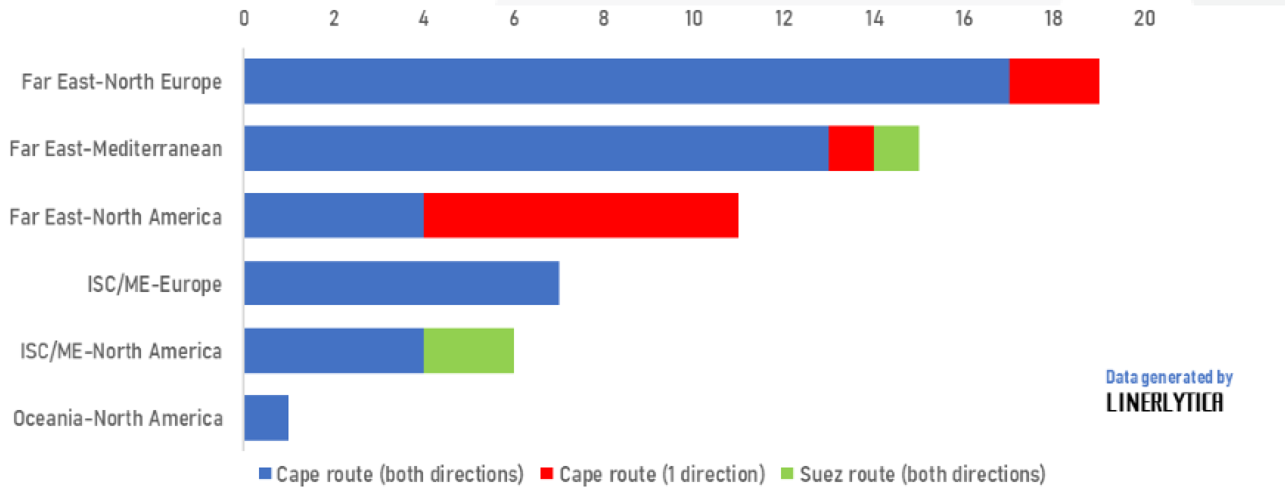


Source: Sea Intelligence

ii. Cape of Good Hope and Suez routing

Major carriers remain hesitant about fully reverting to Suez Canal transits despite intermittent returns. Linerlytica notes ongoing uncertainty: while some services (e.g., CMA CGM's FAL1) are scheduled to resume Suez voyages from April, rerouting of other strings back around the Cape persists, and full redeployment from the longer route would free substantial capacity currently absorbed by Cape detours. The current trades indicate the following routings:

Figure 15 – Number of services on the Cape route (January 2026)



Source: Linerlytica

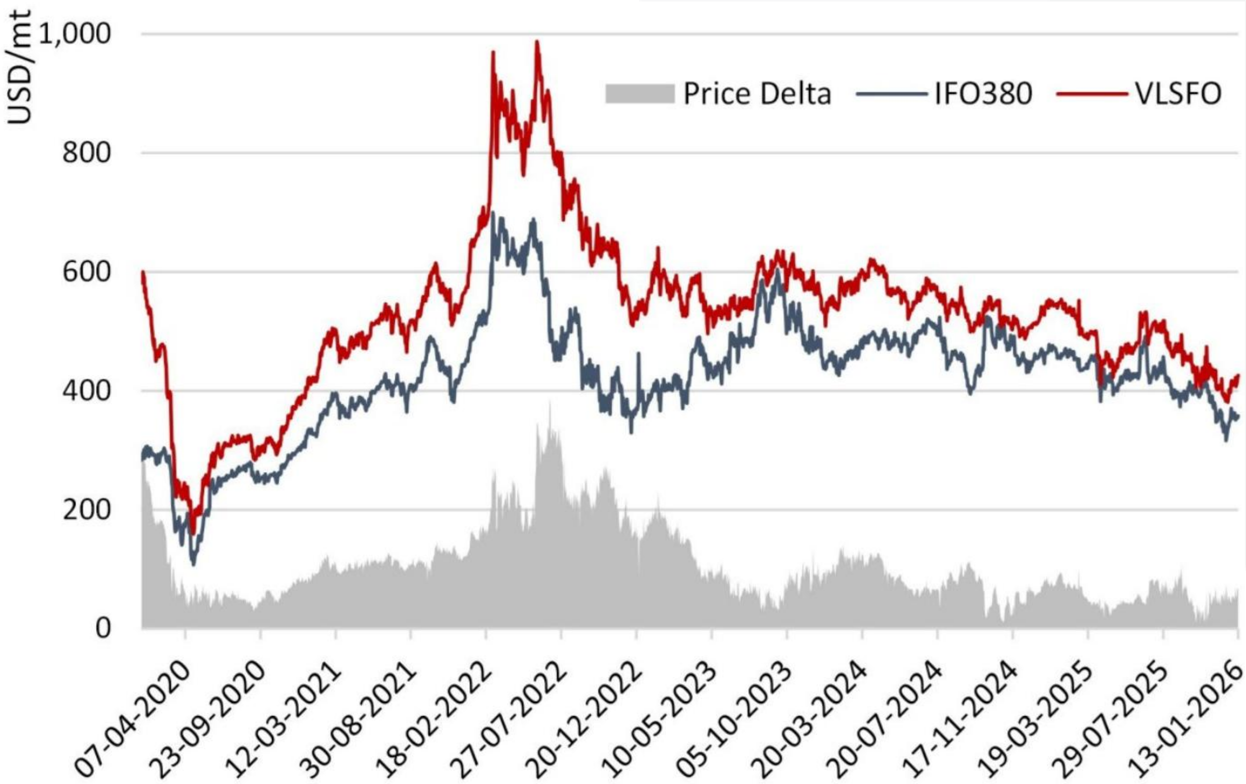
On a carrier level, reports show that CMA CGM has reversed recent Suez returns and rerouted three Asia-Europe services via the Cape, citing heightened geopolitical and security risks, generating shippers' confidence volatility.[11] Consequently, North European and Mediterranean gateways face potential congestion and competitive shifts if Suez transits increase.[12]

[11] Van Marle, G. 20/01/2026. CMA CGM lead rethink on Suez return as political uncertainty rises.
[12] Van Marle, G. 19/01/2026. Return to Suez: major challenges for North Europe and Mediterranean Ports.

iii. Scrubber adoption & fuel update

The latest Alphaliner commentary shows that scrubber adoption in the container fleet has plateaued: scrubber-equipped ships now represent about **42% of cellular container capacity** (**1,543 ships**, **~13,9 Million TEU**), but incremental uptake has slowed markedly compared with the rapid growth seen through mid-2024. This reflects the shrinking fuel price differential between high-sulphur and low-sulphur fuels, which reduces the economic incentive for scrubber installation, alongside the rise of alternative-fuel newbuilds and tightening regulatory frameworks (e.g., EU FuelEU Maritime and Fit for 55) that disadvantage scrubber systems due to higher energy use. Lower fuel spreads signal diminished cost savings for scrubber operators.

Figure 16 – Rotterdam Bunker Prices ($/MT) with spread HFO/VLSFO



Source: Alphaliner

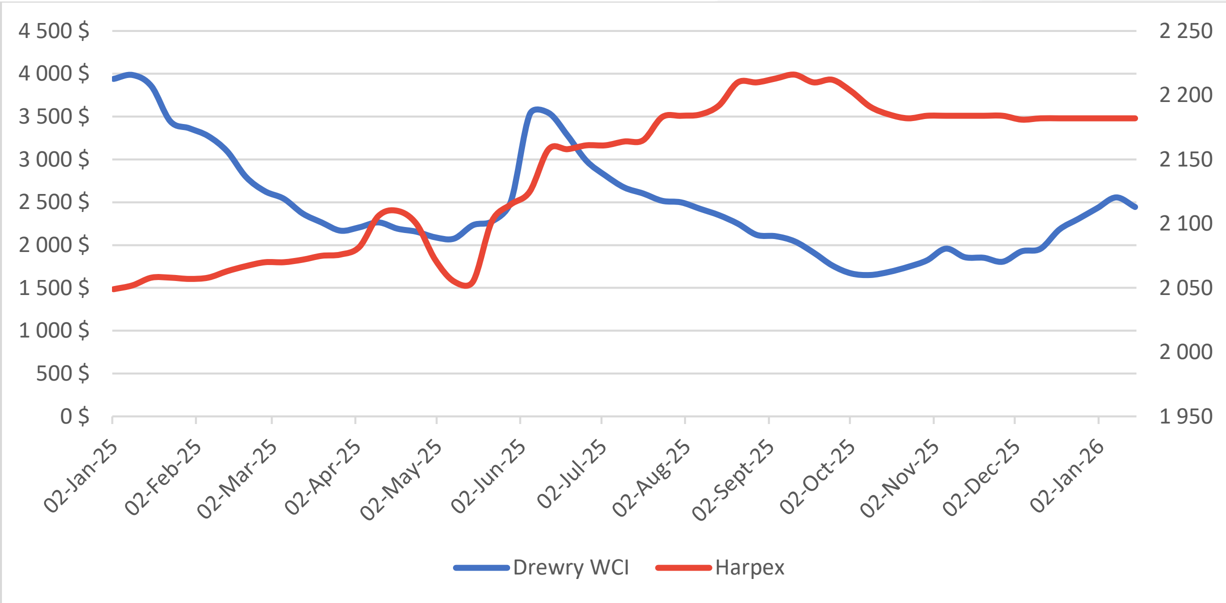
iv. Global freight rates

Latest "*World Container Index (WCI)*" data from Drewry's for the week ending 22 January shows the composite index fell by a significant **↓9,5%** (or **$223**) to approximately **$2,212 per 40-ft container**.[13] The change marked a second consecutive week of declines, indicating continued softening of freight market conditions. Spot rates on major East-West trade lanes were broadly lower: Shanghai–New York rates fell about **↓11%** to **$3,191**, Shanghai–Los Angeles dropped **↓12%** to **$2,546**, and Asia–Europe trades also eased, reflecting reduced cargo demand following the Chinese New Year period (as blankings have been unveiled).[14] Carrier strategies to manage capacity shifted operational patterns – with some services rerouted and others

[13] Drewry. 22/01/2026. World Container Index.
[14] Van Marle. 16/01/2026. Ocean spot rates feel the pressure as CNY blankings are unveiled.

reinstated via traditional canals – suggest a gradual adjustment in adequate capacity to prevent more severe rate collapses amid prevailing weak demand. Elsewhere, the charter market remains stable, with the *Harpex Index* trading at **2,184 points**.[15] The following shows the two indices side-by-side since the start of 2025:

Figure 17 – World Container Index (WCI)

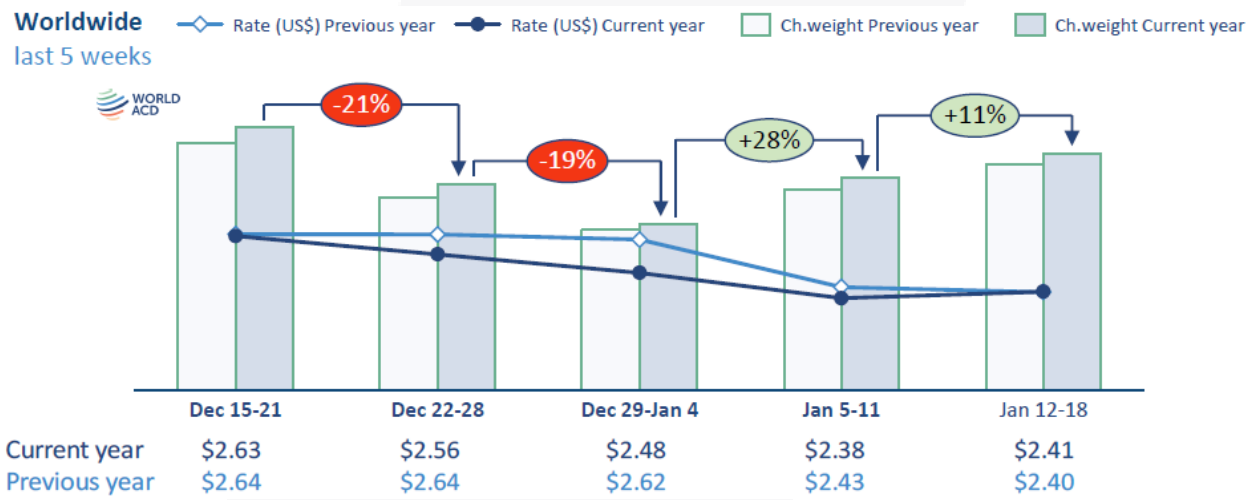


Source: Calculated from [Drewry](#) & [Harpex](#)

b. Global air cargo industry

WorldACD data show a strong post-holiday rebound in global air-cargo demand, with worldwide chargeable weight rising **↑11%** week-on-week in mid-January and remaining about **↑5%** above last year. In comparison, capacity continues to outpace volumes (**↑9%**, versus **↑5%**, y/y, respectively).

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



Source: [World ACD](#)

[15] Harpex. 23/01/2026. Harper Petersen Charter Rates Index.

Rates appear to have bottomed and edged higher to roughly **$2,41/kg**, though pricing remains mixed by region. Asia-Pacific volumes are surging to Europe, while flows to the US are uneven, and spot rates generally trail last year's levels.

In other aviation news, widespread flight cancellations across the United States and Canada this past weekend – driven by severe winter storms that resulted in thousands of cancelled flights at major hubs including Toronto Pearson and multiple US gateway airports – are likely to disrupt scheduled belly and truck-feeder connectivity, constraining cargo lift and throughput on key North American trade corridors. These operational disruptions – stemming from extreme weather and persistent air-network irregular operations – can be expected to reduce volumes on major trade routes linking with these hubs in the near term, adding logistical friction and potential short-term rate volatility.[16]

ENDS [17]

[16] Gorman, S. & Brittain, B. 26/01/2025. Winter storm grips much of US in snow, ice, Arctic cold.

[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.*