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Cargo Movement Update #269[1]

Date: 15 February 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)	21 345	24 319	**45 664**	25 733	29 317	**55 050**	↓17%
Air Cargo (tons)	4 479	2 466	**6 945**	4 343	2 607	**6 950**	↓0,1%

Monthly Snapshot

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

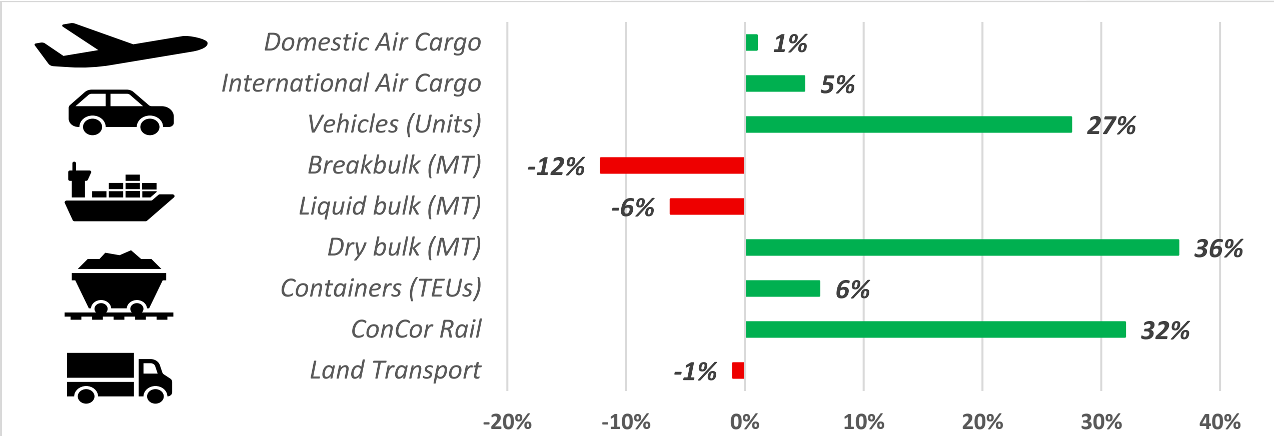
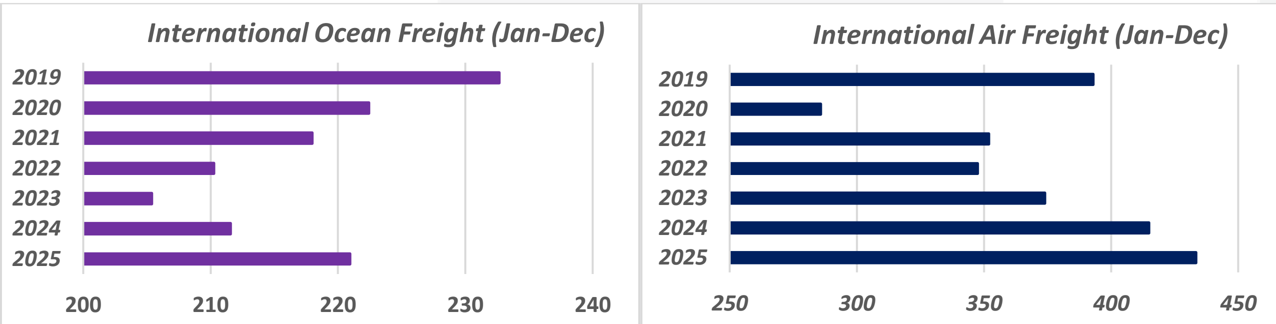


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **6,523**[6] **TEUs** were handled per day, with **7,165 TEUs** projected for next week.
- TNPA Jan: TEUs: **↑1%** (m/m) & **↑6%** (y/y). Bulk: **↑28%** & **↑27%**. Vehicles: **↓20%** but **↑27%** (y/y).
- Rail cargo handled out of Durban was reported at **2,938** containers, up by ↑24% from last week.
- Cross-border queue: **↓1,0**; transit: **↓0,8 hrs**; SA borders: **~8,9 hrs** (**↑6%**); SADC: **~4,4 hrs** (**↓17%**).
- Global container freight rates have declined by another **↓1,3%** (or **$26**) this week, falling to **$1,959/40'.**
- Global air cargo demand is up for a 5th week – by **↑2%** (w/w) & **↑6%** (y/y). Capacity is up by **↑25%** (y/y).

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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 *269th* 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 were not available at the time of reporting

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 **6,523 TEUs** was handled daily, a decrease from **7,864 TEUs** the previous week.

Weather delays continued to plague the Eastern Cape, and especially the Western Cape. Additional system-related delays were incurred with the CTCT experiencing not only wind stoppages, but downtime due to power outages and system challenges, and NCT experienced delays relating to the newly implemented booking system.

Global trade conditions are becoming increasingly fragmented, as recent tariff adjustments—particularly in the United States—are redistributing competitiveness across countries and sectors, reinforcing structural asymmetries and accelerating trade diversion. Developed economies are consolidating advantages, while developing countries face increasing barriers and constraints to value-chain upgrading, underscoring the strategic importance of diversification and export competitiveness.

In the global shipping industry, structural overcapacity continues to weigh on market conditions despite improving dry bulk demand driven by commodity flows such as bauxite, soybeans, and steel. In container shipping, weakening volumes and excess fleet capacity have accelerated consolidation, exemplified by Hapag-Lloyd's planned acquisition of ZIM. Other developments include **(1)** aggressive blank sailings and alliance restructuring to rebalance supply, **(2)** declining transpacific volumes amid tariff impacts and earlier cargo front-loading, and **(3)** continued freight rate weakness, with global container rates declining by **↓1,3%** (w/w) to **$1,959 per 40-ft container**.

For the full month of January, international air cargo reflected the typical cyclical slowdown, with Johannesburg and Cape Town recording sharp month-on-month declines (both down by **↓26%**), Durban showing strong growth both month-on-month and year-on-year, and overall volumes remaining marginally lower (**↓4,8%**, y/y) compared to January 2025. Domestic air cargo volumes also declined sharply month-on-month across the main terminals, reflecting the seasonal slowdown, but remained firmly higher overall (**↑11%**, y/y), supported by strong growth in Durban and sustained gains in Cape Town despite weakness in Johannesburg.

Weekly, international air cargo to and from ORTIA was stable and remained relatively elevated, with some minor increases in inbound cargo. The daily average amounted to **~640,000 kg** inbound (**↑3%**, w/w) and **~352,000 kg** outbound (**↓5%**). Collectively, the current levels remain significantly above last year's level (**↑24%**) and have this week exceeded the comparative levels of pre-pandemic February 2020 (**↑4%**).

Global air cargo demand continued its recovery, with chargeable weight increasing by **↑2%** (w/w) and **↑6%** (y/y), marking the fifth consecutive weekly gain following the year-end slowdown. This growth was driven by strong rebounds in North America and the Middle East & South Asia, while overall capacity increased significantly (**↑25%**, y/y), keeping freight rates broadly stable and indicating a gradual rebalancing of supply and demand.

Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts increased marginally by **↑0,5%** (m/m), reflecting a modest post-Festive Season recovery. However, northbound volumes declined at most crossings – notably Kopfontein (**↓17%**), Beitbridge (**↓14%**), and Groblersbrug (**↓14%**) – while Lebombo recorded a strong counter-trend increase of **↑11%**.

On the N4 corridor, movements increased for heavy-goods vehicles – despite some operational challenges this week. Truck volumes through the border post increased to around **1,399 HGVs per day** (**↑2%**, w/w).

Overall queue times decreased to an average of **~3,4 hours** (**↓23%**) at the border. The average processing times also decreased, to an average of **~3,2 hours** (**↓26%**) per crossing. Other developments this week include operational disruptions during the KM7 dry run at the Lebombo border post, where system glitches, limited staffing, and single-lane processing significantly reduced throughput and resulted in truck queues within the staging areas. However, no delays were reported at the physical border itself.

Weekly figures in the SADC region show that cross-border road transport times decreased on average this week. Overall, the average queue time decreased by **an hour** from last week, while transit time decreased by nearly **an hour**. The median border crossing times at South African borders, on the other hand, increased by approximately **half an hour** on average, averaging **~8,9 hrs** (**↑6%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased by nearly **an hour**, averaging **~4,4 hrs** (**↓17%**). This week, on average, the same two SADC borders took more than a day to cross, namely Beitbridge and Kasumbalesa (the worst affected, taking around **two days** to cross). Other cross-border developments this week included **(1)** FESARTA establishing contact with a security provider in the DRC to support copper truck escorts and improve corridor security, **(2)** extended delays at Zimbabwe's borders following changes to ZIMRA's duty payment confirmation system, with queues reaching 7,4 km, and **(3)** Botswana introducing a 3-day transit permit, with misalignment with Zambia's T1 processes increasing compliance risk and potential penalties.

South Africa's strong dry bulk performance in January aligns with improving global commodity demand, particularly for iron ore and other resource exports, emphasising again the enabling role of logistics as a primary production input rather than a downstream service. Indeed, South Africa exported a record number of iron ore exports out of the Port of Saldanha in January (with some **9,3 million metric tonnes** of total dry bulk cargo exported out of the port), which is the highest since June 2018. TNPA reported total bulk throughput of **23,8 million tonnes**, increasing by **↑28%** (m/m) and **↑27%** (y/y), alongside container volumes rising by **↑6%** (y/y) to **353,825 TEUs**. These gains reflect renewed export momentum across mining, agriculture, and manufacturing sectors, where efficient rail-port integration, terminal productivity, and corridor reliability determine the ability to convert resource endowment into trade flows, foreign exchange earnings, and broader economic output.

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. Nevertheless, an update is provided below, including the weekly number of containers moved on the waterside. Note: the reporting unit is in containers and not TEUs, as shown in *Tables 2* and *3*.

Table 2 – Container Ports – Weekly flow reported for 9 to 15 February (measured in TEUs)

7-day flow reported (09/02/2026 – 15/02/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Pier 2)	Since the transition from DCT to DGT, no information has been received. Note the totals below.		
New Pier (Pier 1)	1 824	12 767	↓19%
Cape Town Container Terminal	1 426	9 980	↓34%
Ngqura Container Terminal	1 953	13 673	↓26%
Port Elizabeth Container Terminal	133	934	↑453%
Other	1 187	8 310	↑44%
Total	**6 523**	**45 664**	**↓17%**

Source: Calculated from TPT, 2026. Updated 15/02/2026.

An average of **~5,523 TEUs** (↓17%) was handled per day for the last week (*9 to 15 February, Table 2*). Consequently, throughput was below the projected average of **~7,165 TEUs** (↓9% actual versus projected). For the coming week, an increased average of **~7,165 TEUs** (↑10%) is predicted to be handled (*16 to 22 February*, *Table 3*).

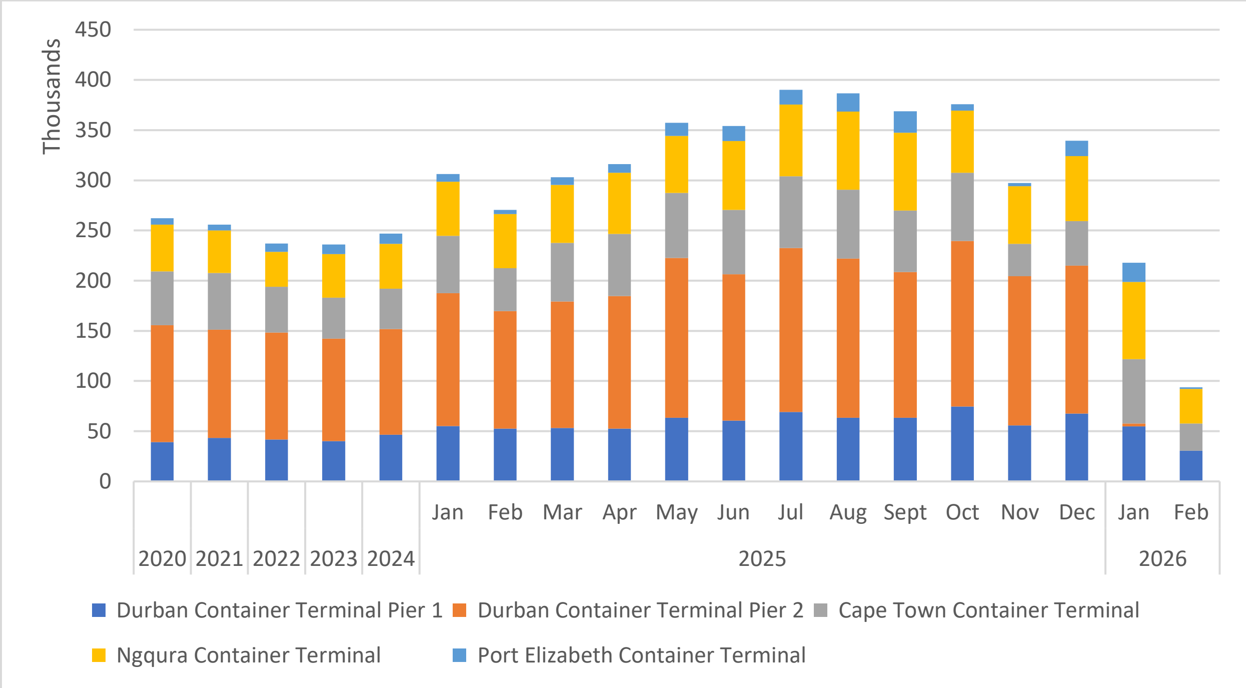
Table 3 – Container Ports – Weekly flow projected for 16 to 22 February (measured in TEUs)

7-day flow projected (16/02/2026 – 22/02/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Pier 2)	Since the transition from DCT to DGT, no information has been received. Note the totals below.		
New Pier (Pier 1)	1 897	13 277	↑4%
Cape Town Container Terminal	1 910	13 373	↑34%
Ngqura Container Terminal	1 945	13 617	↓0,4%
Port Elizabeth Container Terminal	366	2 561	↑174%
Other	1 047	7 329	↓12%
Total	**7 165**	**50 157**	**↑10%**

Source: Calculated from TPT, 2026. Updated 15/02/2026.

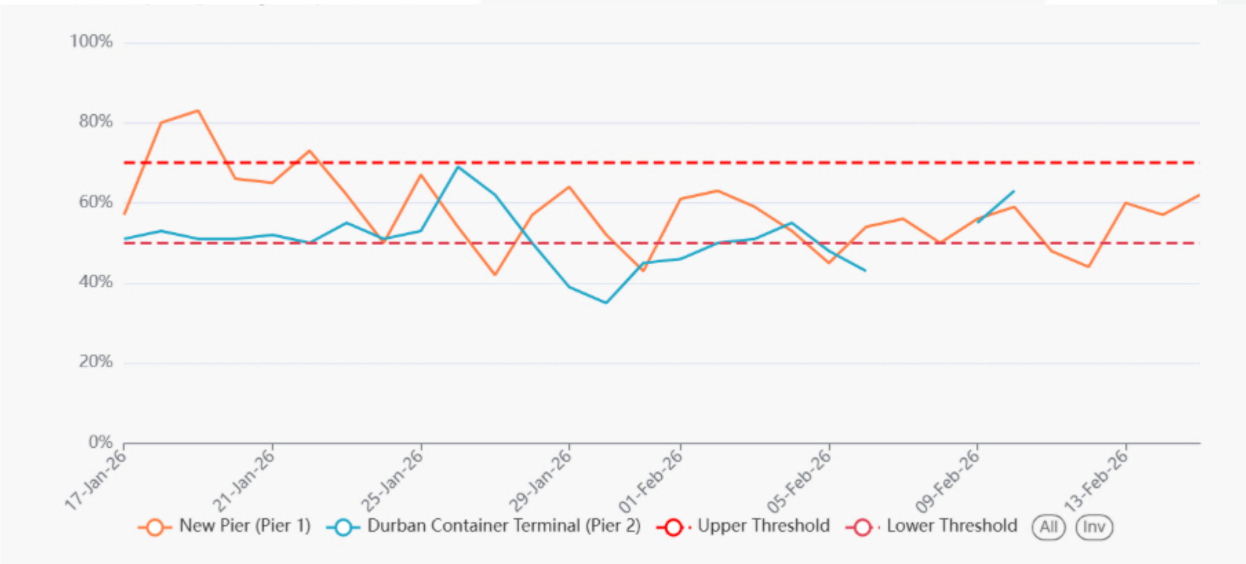
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2026, and updated 15/02/2026.

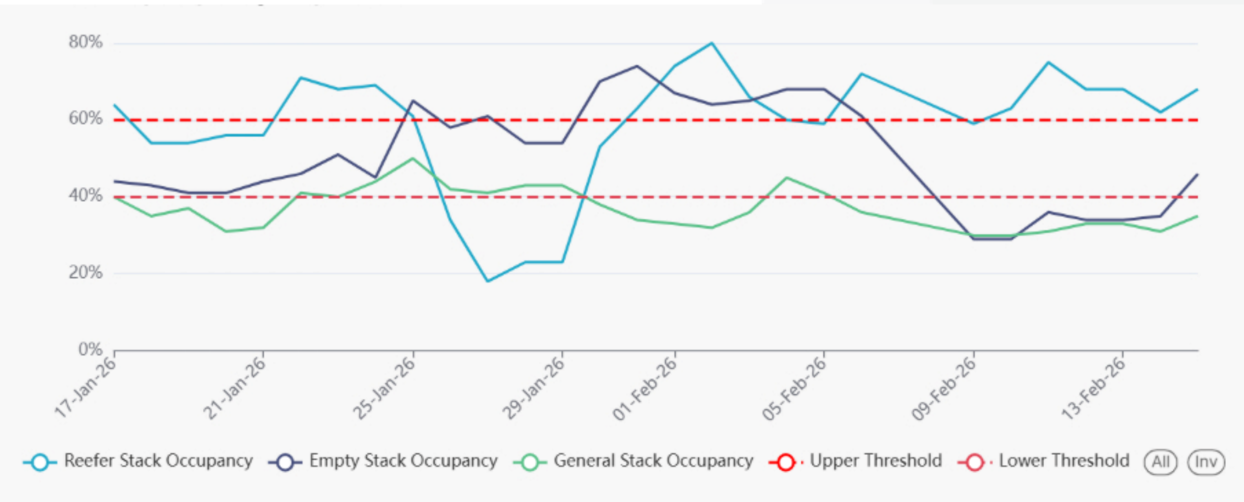
Figure 4 – Stack occupancy in DCT, general-purpose containers (17 January to present; day on the day)



Source: Calculated using data from Transnet, 2026, and updated 15/02/2026.

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 (17 January to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 15/02/2026.

b. TNPA: January update

TNPA has released consolidated port statistics for January[7], with the figures showing that:

- Container throughput totalled **353,825 TEUs**, which is up by **↑1%** (m/m) and **↑6%** (y/y).
- Total bulk cargo totalled **23,8 million tonnes**, which is up by **↑28%** (m/m) and **↑27%** (y/y).
- Vehicle throughput totalled **67,761 units**, which is down by **↓20%** (m/m), but up by **↑27%** (y/y).

These figures indicate that Transnet had a good start to the year and has continued to build on some good momentum gathered at the end of last year. Compared to December, several metrics are stable, as significant gains were made in the bulk sector. In fact, a record number of iron ore was exported out of the Port of Saldanha in January (with some **9,3 million metric tonnes** of total dry bulk cargo exported out of the port), which is the highest since June 2018. The following table shows the respective changes versus December:

Table 4 – TNPA – Monthly volume and growth: January 2026

	Dec	Jan	Movement	% change
Containers (TEUs)	**349 999**	**353 825**	**3 826**	**1%**
Landed	187 185	186 554	-631	0%
Shipped	162 814	167 271	4 457	3%
Dry bulk (MT)	14 989 512	20 107 798	5 118 286	34%
Liquid bulk (MT)	3 091 413	3 230 888	139 475	5%
Breakbulk (MT)	509 186	470 391	-38 795	-8%
Vehicles (Units)	84 443	67 761	-16 682	-20%
Total cargo (excl. Vehicles)	**18 590 111**	**23 809 077**	**5 218 966**	**28%**

Source: TNPA, updated 17/02/2026.

[7] Transnet. 2025. Port statistics.

Transnet Port Terminals handled nearly **354 thousand containers** and **24 million metric tonnes** of **bulk** cargo during January. Container throughput was mostly as expected; however, bulk throughput was significantly above the average levels of late. Elsewhere, vehicle throughput decreased slightly, coming in at **67,761 units**. Looking at the cyclical figures, the following table shows the respective changes versus January of last year and pre-pandemic:

Table 5 – TNPA – Cyclical volume and growth: January 2020, 2025, and 2026

	2020	2025	2026	% 20 –'26	% '25-'26
Containers (TEUs)	**347 651**	**332 965**	**353 825**	**2%**	**6%**
Landed	174 955	183 216	186 554	7%	2%
Shipped	172 696	149 749	167 271	-3%	12%
Dry bulk (MT)	16 136 610	14 732 387	20 107 798	25%	36%
Liquid bulk (MT)	3 185 728	3 446 314	3 230 888	1%	-6%
Breakbulk (MT)	324 765	535 315	470 391	45%	-12%
Vehicles (Units)	39 879	53 160	67 761	70%	27%
Total cargo (excl. Vehicles)	**19 647 103**	**18 714 015**	**23 809 077**	**21%**	**27%**

Source: TNPA, updated 17/02/2026.

Compared to yearly trends, gains are evident across several sub-sectors, with dry bulk (**↑36%**) and vehicles (**↑27%**) leading the way. The only contractions are with breakbulk (**↓12%**) and liquid bulk (**↓6%**). All in all, the figures are overwhelmingly positive. For 2026, our internal forecasts demonstrate that South Africa can confidently achieve growth rates of between **↑2,5%** to **↑4,2%** for the year.

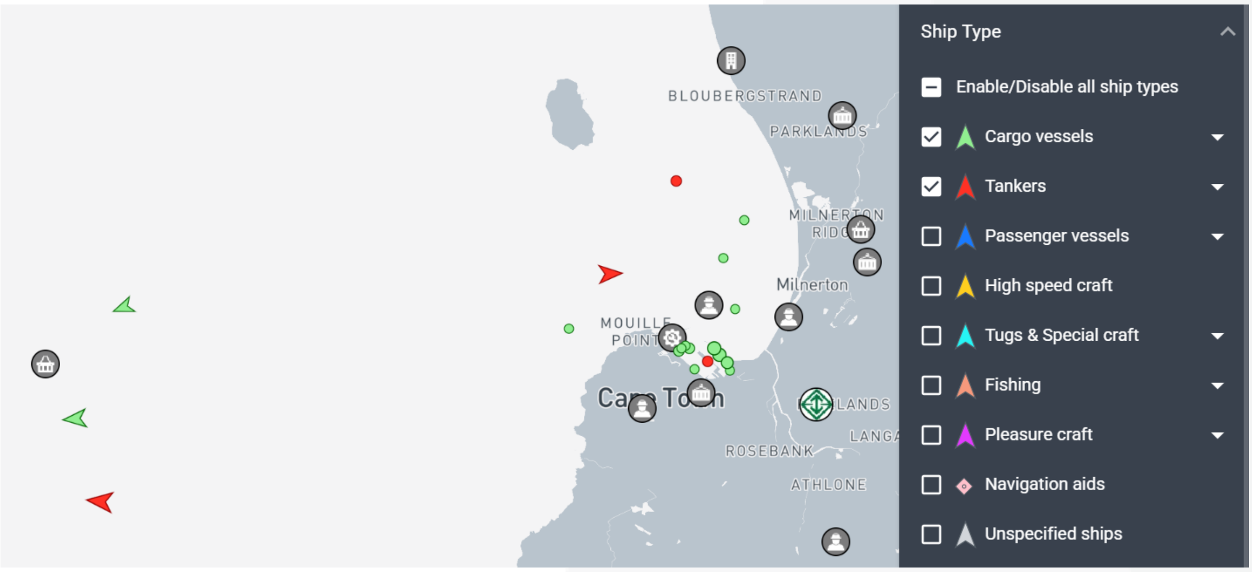
c. Summary of port operations

i. Cape Town

CTCT's operational struggles continued, starting the week with power outages, system down times and weather delays, leaving the port non-operational for the entirety of Monday, and a significant portion of Tuesday. Following that, further intermittent weather delays were experienced, with six vessels at anchorage by the end of the week, and a significant reduction in volumes from the previous week and the projections for the week. Indeed, according to Linerlytica, the current *queue-to-berth ratio* at the port is **1,00**.[8] The terminal reported that the weather forecast for this week seems to be clear. In spite of the challenges, the terminal had an average of 8 out of 9 cranes and 29 out of 32 RTGs available.

[8] Linerlytica. 14/02/2026. Global Containership Port Congestion.

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



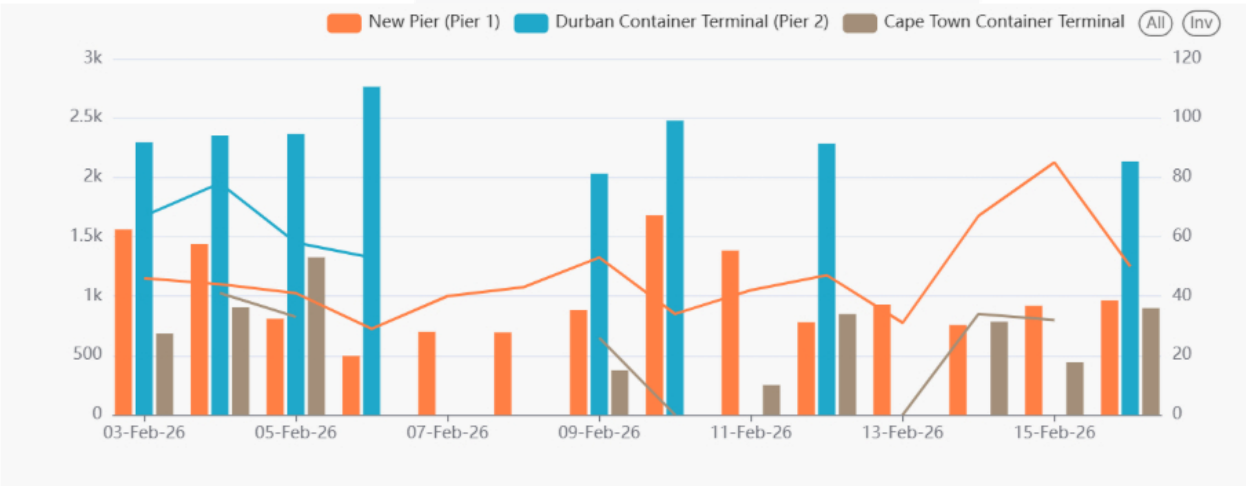
Source: Marine Traffic. Updated 15/02/2026 at 14:00.

ii. Durban

The **TTT** at Pier 1 for the week averaged **~51 minutes** (**↑21%**, w/w), and the average **staging time** was **~37 minutes** (**↑68%**). The terminal had an average of four out of seven cranes and 16 out of 25 RTGs available. Pier 1 indicated that the low volumes for the past week will continue through this week, in large part due to the Chinese New Year, which has led to empty berths and a lull in operations at the terminal.

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

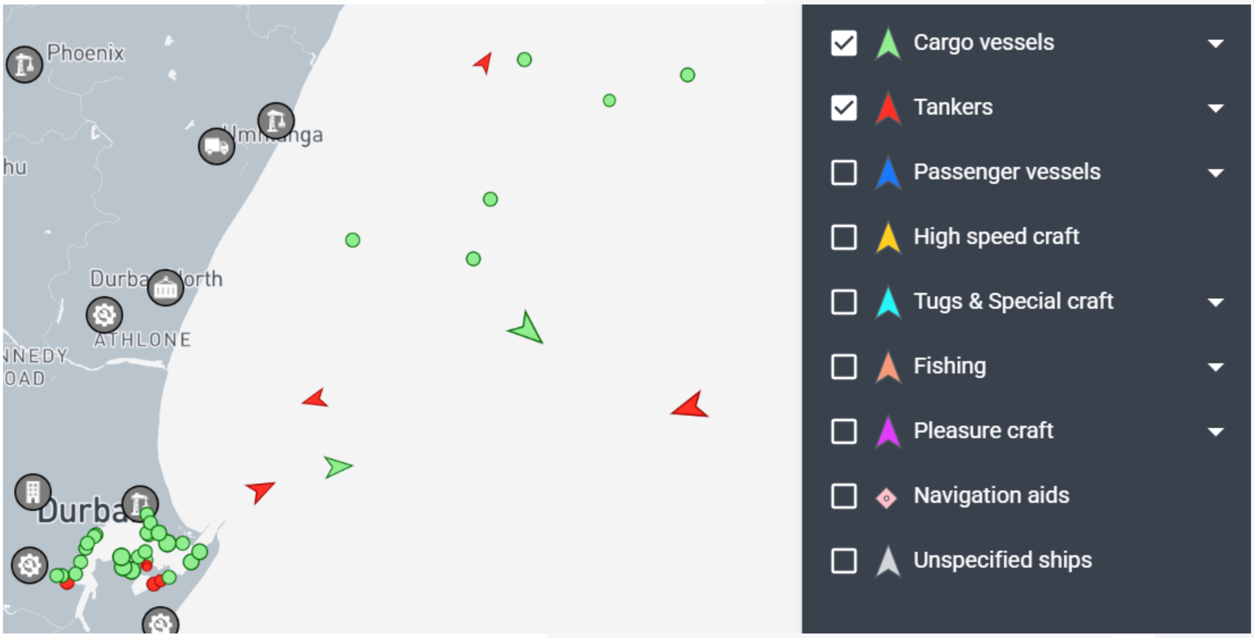
Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 15/02/2026.

The queue of container vessels waiting outside Durban was stable this week. On Wednesday afternoon (18 February), **one** container vessel was waiting outside at anchorage for Point. The queue of dry (**three**), liquid (**one**), and breakbulk (**one**) vessels slightly decreased from last week:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 15/02/2026 at 14:00.

iii. Eastern Cape

NCT started implementing the truck booking system at the terminal last week (starting Monday morning). The process has been met with mixed reviews, with truckers indicating one of the largest challenges is the communications received from the terminal (bookings can only be made once a vessel has completed discharge, which should be communicated to the industry promptly to allow adequate time to make bookings). The terminal had an average of 6 out of 8 cranes and 25 out of 30 RTGs available throughout the week.

TNPA Port Elizabeth reported one tug out of commission, with no estimated date of return as yet, resulting in the port having to share with the Port of Ngqura. This has resulted in minor delays in vessel movements. In addition, PECT's second Mobile Harbour Crane remains out of commission, with the estimated date of return remaining 31 March.

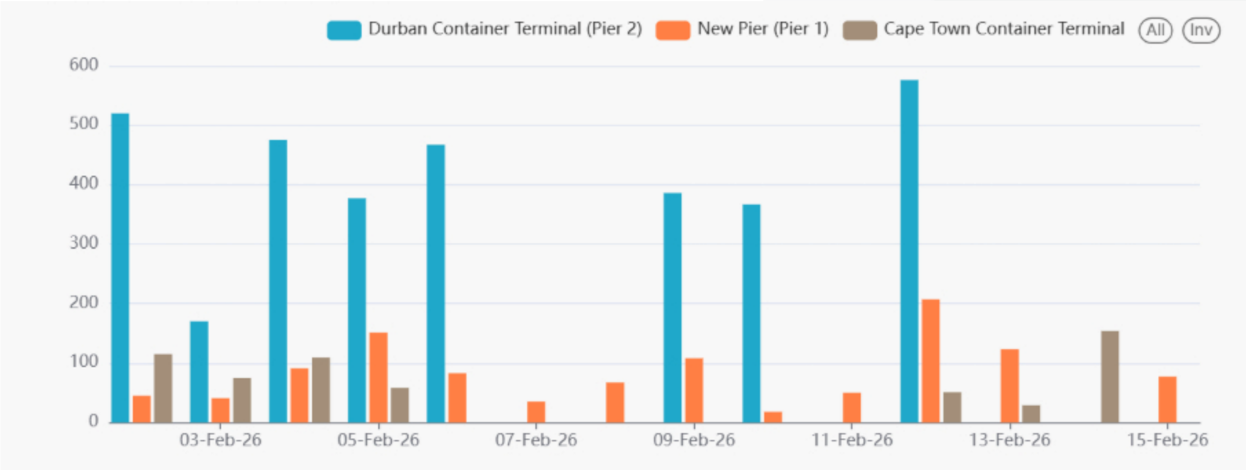
iv. Richards Bay

The daily average coal throughput for the week increased after the lower volumes posted last week and averaged around **188,000 tons** (**↑21%**, w/w) a day. An average of **22 trains** was serviced on the landside (slightly higher than last week's 19), and slightly on par with the target (of 22 trains).

v. Transnet Freight Rail (TFR)

There has been a full recovery on the City Deep – Mafikeng line, and no further challenges have been reported across the port system.

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



Source: Calculated using data from Transnet, 2025. Updated 15/02/2026.

In the last week (*9 to 15 February*), rail cargo on the ConCor line out of Durban was reported at **2,938** (excluding 14/15 February for DGT) containers, up by **↑24%** from the previous week's **2,371** 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 (*9 to 15 February*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *February 2025* averaged **~796,956 kg**.

Table 6 – International inbound and outbound cargo from OR Tambo

Flows	**Daily Ave.**	**Weekly Vol.**	**Change** (w/w)
Volume inbound	**639 867**	**4 479 069**	**↑3%**
Volume outbound	**352 217**	**2 465 519**	**↓5%**
Total	**992 084**	**6 944 588**	**↓0,1%**

Courtesy of ACOC. Updated: 15/02/2026.

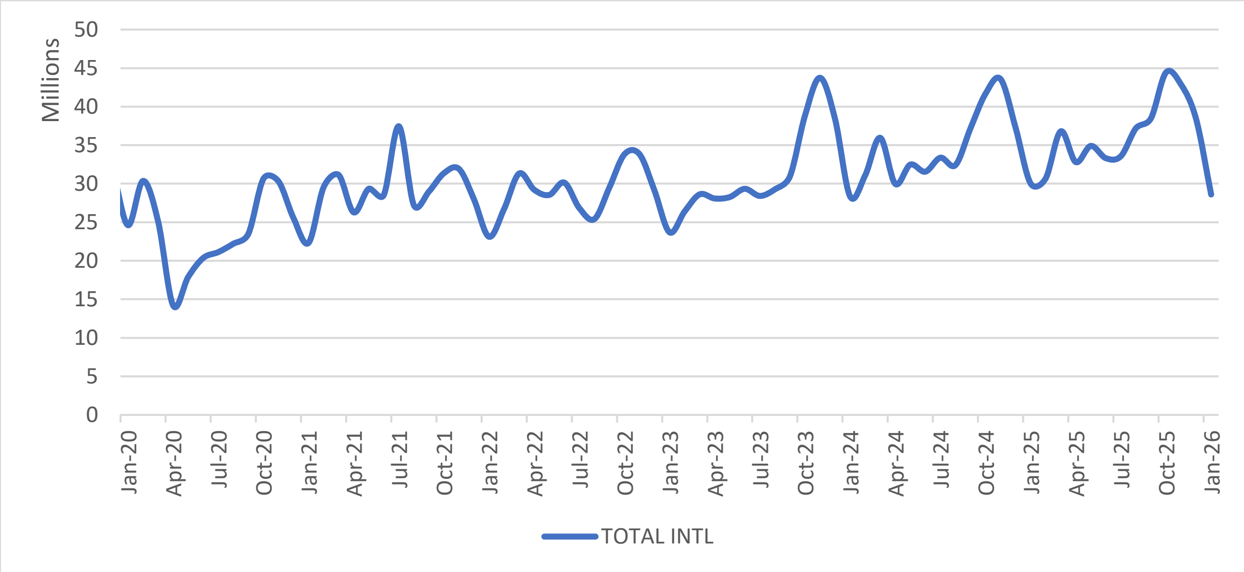
International air cargo to and from ORTIA was stable this week and remained relatively elevated, with some minor increases in inbound cargo. The daily average amounted to **~640,000 kg** inbound (**↑3%**, w/w) and **~352,000 kg** outbound (**↓5%**). Collectively, the current levels remain significantly above last year's level (**↑24%**) and have this week exceeded the comparative levels of pre-pandemic February 2020 (**↑4%**).

For the full month of January, the typically cyclical lull is evident:

- Johannesburg decreased by **↓26%** (m/m) versus December, but is up by **↑5%** (y/y) versus 2025.
- Cape Town also decreased by **↓26%** (m/m) and by **↓28%** (y/y) versus 2025.
- Durban increased by **↑6%** (m/m) and by **↑38%** (y/y) versus 2025.
- Consequently, total international air cargo for January 2026 was down by **↓4,8%** (y/y) versus 2025.

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

Figure 10 – International cargo: All terminals (kg millions)



Calculated from ACOC. Updated: 16/02/2026.

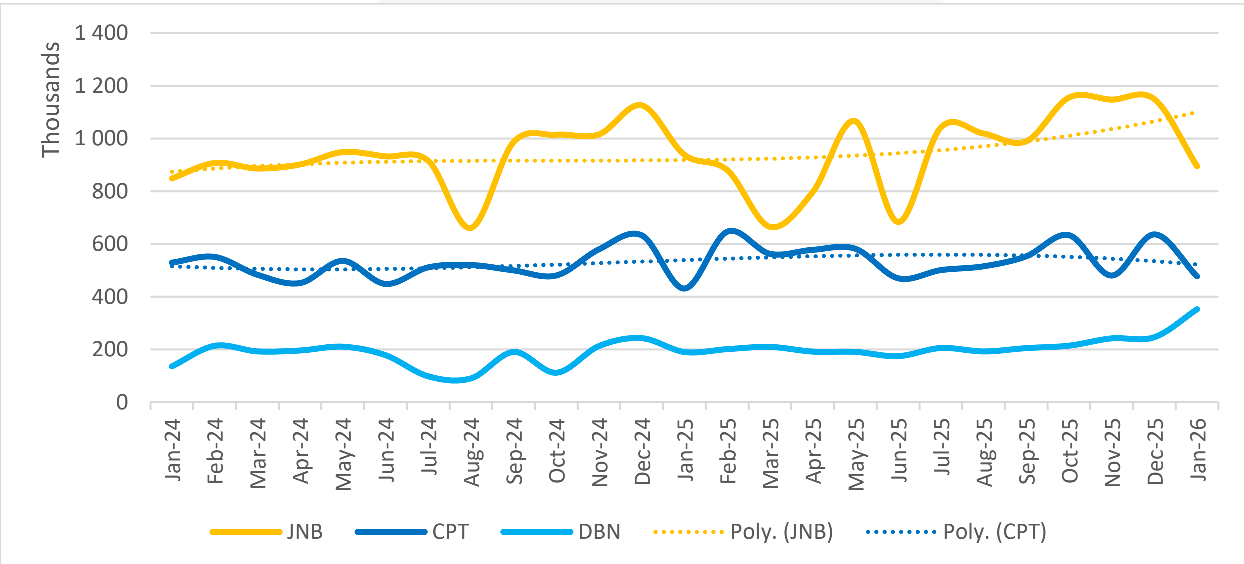
b. Domestic air cargo

For the whole month of January, domestic volumes handled at our three main terminals decreased significantly, but remain up on last year's volumes:

- Johannesburg decreased by **↓22%** (m/m) versus December, and is down by **↓5%** (y/y) versus 2025.
- Cape Town decreased by **↓25%** (m/m), but is up by **↑11%** (y/y) versus 2025.
- Durban increased by **↑43%** (m/m) and is nearly double (**↑85%**) year-on-year.
- Consequently, total monthly domestic air cargo for January was down by **↓15%** (m/m), but remained up by **↑11%** (y/y) versus 2025.

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 16/02/2026.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*9 to 15 February)*, movements increased for heavy-goods vehicles – despite some operational challenges this week. The border post was significantly delayed on Saturday, with additional limited processing on Monday adding to the delays.

Some updates concern the processing pilot:

- A dry run of the new truck driver passport processing system at the KM7 runway commenced at 08h00 (later than the planned 06h00 start) due to immigration system glitches.
- Processing capacity has been significantly constrained, with only one operational vehicle lane/booth at KM7 instead of the intended four lanes, resulting in processing times of approximately 2.5–3 minutes per truck.
- Staffing constraints further reduced throughput after a Mozambican immigration official withdrew unexpectedly, leaving only one Mozambican and two South African officials processing drivers.
- Consequently, queues have built up within staging areas and extended towards the start of the runway, although no congestion has been reported between KM7 and the physical border crossing itself.
- Authorities suspended the dry run at 18h00 on 16 February and will resume operations at 08h00 on 17 February, while border pass issuance continues in the interim.
- Truck volumes through the border post increased to around **1,399 HGVs per day** (**↑2%**, w/w).
- Overall queue times decreased to an average of **~3,4 hours** (**↓23%**) at the border.
- The average processing times also decreased, to an average of **~3,2 hours** (**↓26%**) per crossing.

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

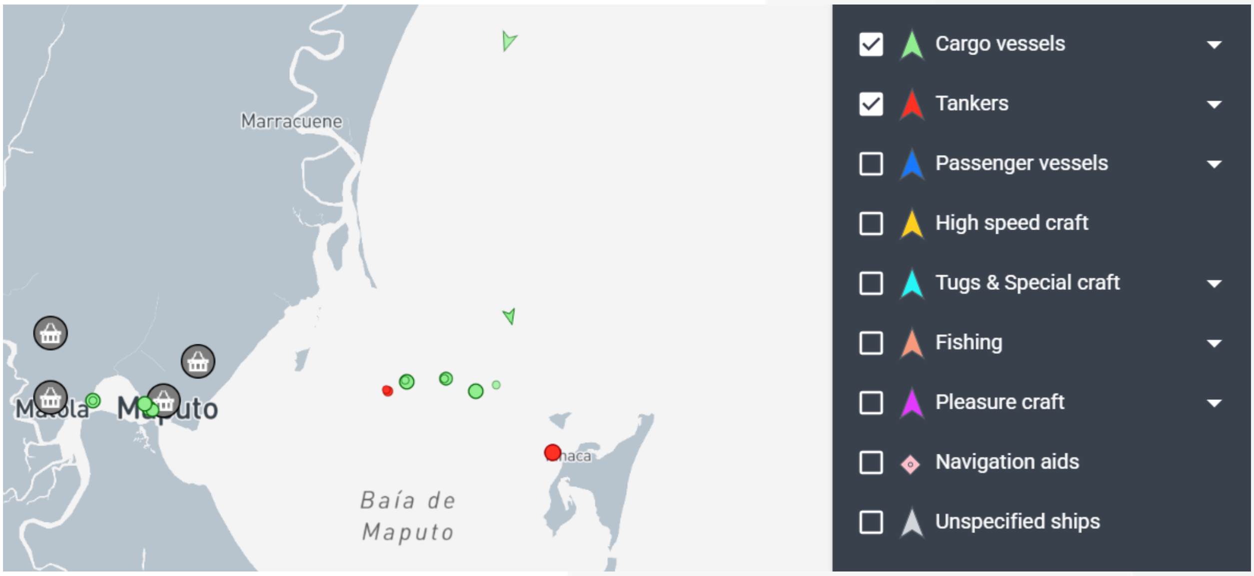
Table 7 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1 399	1 332	1 032	208	52	61	47	243
% (w/w)	**2%**	**6%**	**0%**	**8%**	**2%**	**-2%**	**40%**	**8%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 15/02/2026.

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 15/02/2026 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 January:

Table 8 – HGVs – Main South African borders (both directions)

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	12 833	**-20%**	7 706	**-3%**	20 539	**-14%**
Groblersbrug	6 231	**-13%**	4 556	**-15%**	10 787	**-14%**
Kopfontein	5 388	**-15%**	943	**-27%**	6 331	**-17%**
Lebombo	39 444	**10%**	39 265	**12%**	78 709	**11%**
Ramatlhabama	5 623	**-11%**	2 261	**75%**	7 884	**3%**
Skilpadshek	7 732	**-12%**	1 938	**5%**	9 670	**-9%**

Source: TLC & FESARTA, 18/02/2026.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts increased by **↑0,5%** (m/m), driven primarily by the slight upturn after the Festive Season of December (**↓12%** down on November). Northbound traffic (Eastbound for Lebombo) decreased across the board – except through Lebombo, with the total reductions evident at **Kopfontein** (**↓17%**), **Beitbridge** (**↓14%**) and **Groblersbrug** (**↓14%**). Lebombo's overall total increased by **↑11%**.

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

- Overall, the average queue time decreased by **an hour** from last week, while transit time decreased by nearly **an hour**.
- The median border crossing times at South African borders, on the other hand, increased by approximately **half an hour** on average, averaging **~8,9 hrs** (**↑6%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased by nearly **an hour**, averaging **~4,4 hrs** (**↓17%**).

1. **DRC corridor security:**
    a. FESARTA has established contact with a private security agency in the DRC to provide escorts for copper trucks and support with broader security risks, representing a constructive step toward improving safety and predictability along critical mining export corridors.
2. **Zimbabwe border delays (ZIMRA payments):**
    a. A new ZIMRA payment confirmation system – intended to reflect duty payments within 30 minutes in ASYCUDA World – is currently experiencing delays of 24 hours or more.
    b. Combined with exchange rate–driven duty top-ups, this has materially slowed border processing, with reports of trucks taking over a week to enter Zimbabwe and queues reaching 7,4km.
3. **Botswana transit permit requirement (BURS):**
    a. Botswana has introduced a 3-day Temporary Permit for foreign transit trucks.
    b. However, operational misalignment with Zambia's T1 release process – which can take up to 5 days – creates compliance risks, including penalties of P5,000 for late exit and K4,000 for entry into Zambia without a T1, increasing operational and cost uncertainty for cross-border operators.

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

Table 9 – Delays[9] summary – South African borders[10] (both directions)

Border Post	Direction	HGV[11] 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	575	28,7	6,4	29,0	17 250	4 025
Beitbridge	Zimbabwe-SA	525	12,6	2,1	12,3	15 750	3 675
Groblersbrug	SA-Botswana	221	12,5	1,5	12,3	6 630	1 547
Martin's Drift	Botswana-SA	187	2,0	0,3	2,0	5 610	1 309
Kopfontein	SA-Botswana	186	6,2	1,4	6,1	5 580	1 302
Tlokweng	Botswana-SA	23	0,6	0,2	0,4	690	161
Vioolsdrift	SA-Namibia	30	5,1	1,5	5,2	900	210
Noordoewer	Namibia-SA	20	1,4	0,4	1,3	600	140
Nakop	SA-Namibia	30	5,4	0,5	5,2	900	210
Ariamsvlei	Namibia-SA	20	1,0	0,3	1,0	600	140
Skilpadshek	SA-Botswana	270	7,2	2,3	7,1	8 100	1 890
Pioneer Gate	Botswana-SA	66	0,0	0,0	0,0	1 980	462
Ramatlhabama	SA-Botswana	159	3,0	0,3	3,0	2 190	511
Ramatlhabama	Botswana-SA	73	0,5	0,2	0,3	4 770	1 113
Lebombo	SA-Mozambique	1 300	3,4	0,5	3,2	39 000	9 100
Ressano Garcia	Mozambique-SA	1 298	1,7	0,2	1,4	38 940	9 086
Sum/Average		**4 983**	**5,7**	**1,1**	**5,6**	**149 490**	**34 881**

Source: TLC, FESARTA, & Crickmay, week ending 08/02/2026.

[9] 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.
[10] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[11] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

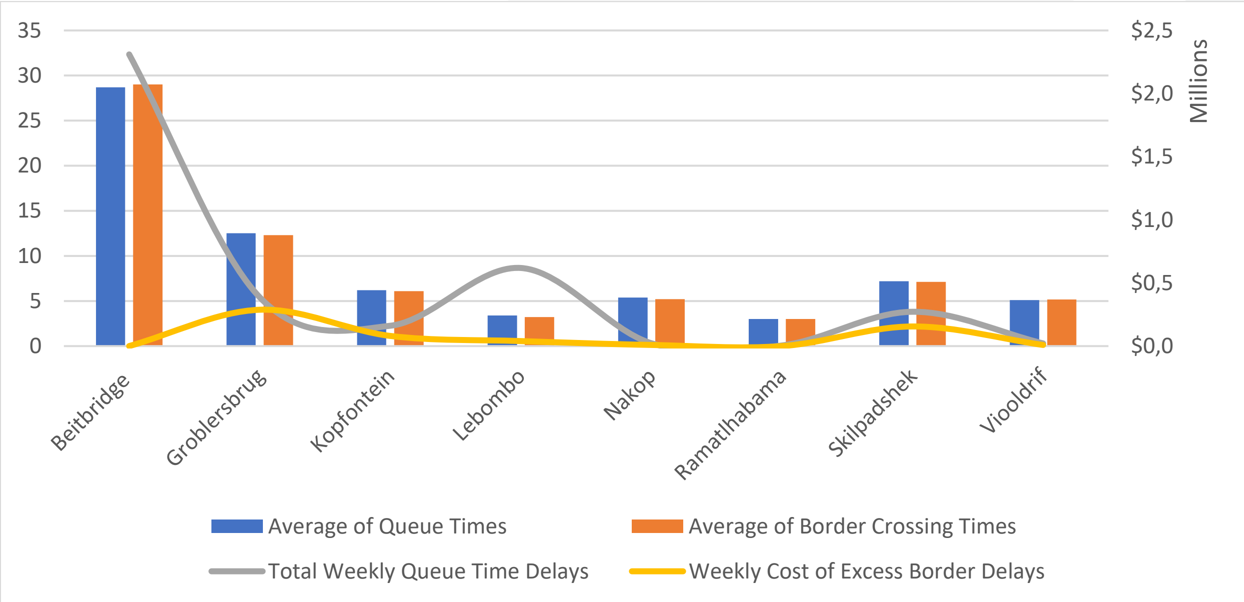
Table 10 – Delays summary – Corridor perspective

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	12,1	3,8	12,0	9 600	2 240
Central Corridor	798	0,2	0,1	0,2	23 940	5 586
Dar Es Salaam Corridor	1 819	12,2	3,3	12,0	54 570	12 733
Maputo Corridor	2 598	2,6	0,4	2,3	77 940	18 186
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 465	11,3	2,5	11,0	103 950	24 255
Northern Corridor	2 817	0,5	0,2	0,4	92 520	21 588
WBNLD Corridor	807	2,8	0,6	2,7	24 210	5 649
Trans Cunene Corridor	100	3,2	0,7	3,2	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700
Trans Oranje Corridor	116	12,8	3,5	12,7	3 480	812
Sum/Average	**13 067**	**5,0**	**1,2**	**4,9**	**400 020**	**93 338**

Source: TLC, FESARTA, & Crickmay, week ending 08/02/2026.

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

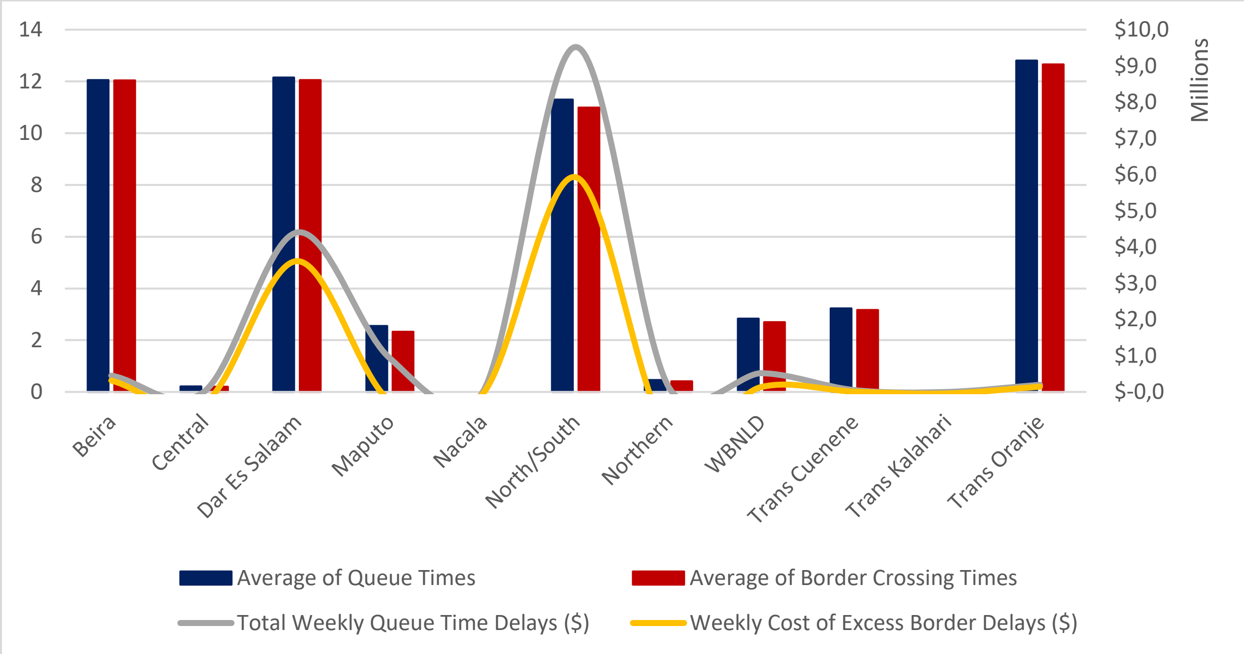
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 08/02/2026.

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 08/02/2026.

In summary, cross-border queue time averaged **~5,0 hours** (down by **~1,0 hours** from the previous week's **~6,0 hours**), indirectly costing the transport industry an estimated **$16,2 million** (**R259 million**). Furthermore, the week's average cross-border transit times also hovered around **~4,9 hours** (down by **~0,8 hours** from the **~5,7 hours** recorded in the previous report), at an indirect cost to the transport industry of **$8,3 million** (**R133 million**). The total indirect cost for the week amounts to an estimated **~$24,5 million** (**R392 million**, down by **↓23%** from the **~R509 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 trade update, **(b)** the global shipping industry, and **(c)** the global aviation industry.

a. Global trade update

UNCTAD's latest *Global Trade Update* highlights that recent tariff adjustments – particularly in the United States – are reshaping global trade competitiveness, redistributing market share unevenly across countries, sectors, and value chains. The emerging pattern illustrates a "*tale of three sectors*," where policy-driven price differentials are directly influencing sourcing decisions and trade flows.

Key developments include:

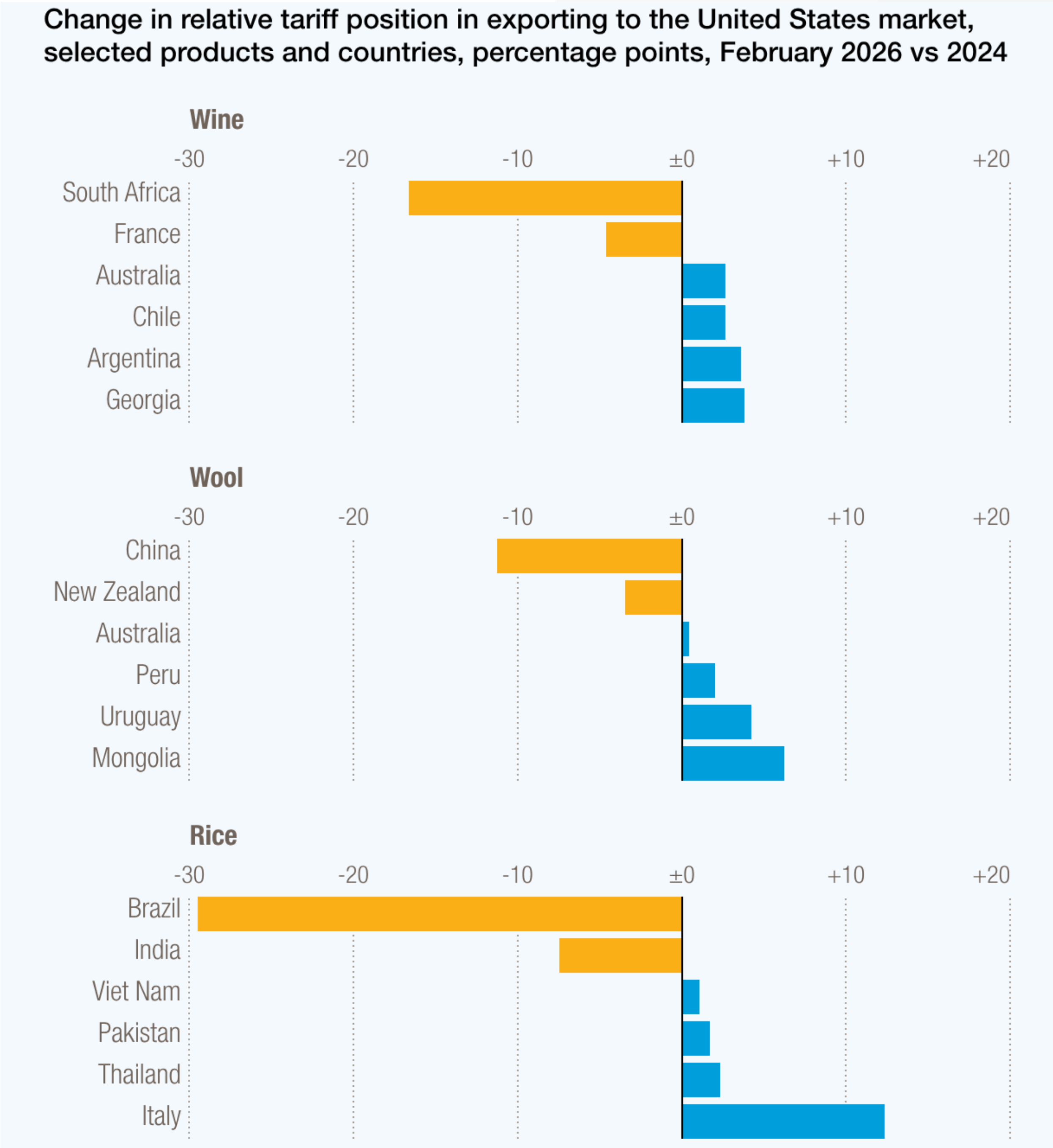
Trade policy shifts are redistributing competitiveness globally: Tariff changes alter relative export prices, affecting which countries gain or lose access to key markets and influencing sourcing, production, and investment decisions across global value chains.

Developed economies are gaining a relative advantage, while developing economies face growing disadvantages: Recent tariff changes have widened competitiveness gaps, with developed countries strengthening their position, while developing and least developed countries face increasing tariff-related barriers in major markets.

Sector-specific trade diversion is accelerating (note the illustration "*tale of three sectors*" below): Uneven tariff changes are creating winners and losers across individual commodities—for example, South African wine exports to the US have become significantly more expensive relative to competitors, while some European agricultural exports have gained tariff advantages, reshaping bilateral trade patterns.

Tariff escalation continues to constrain value-chain upgrading: Lower tariffs on raw materials and higher tariffs on processed goods (e.g., cocoa vs chocolate) reinforce structural asymmetries, limiting developing economies' ability to move up the value chain and capture greater export value.

Figure 15 – A tale of three sectors: Winners and losers in wine, wool, and rice markets



Source: UNCTAD

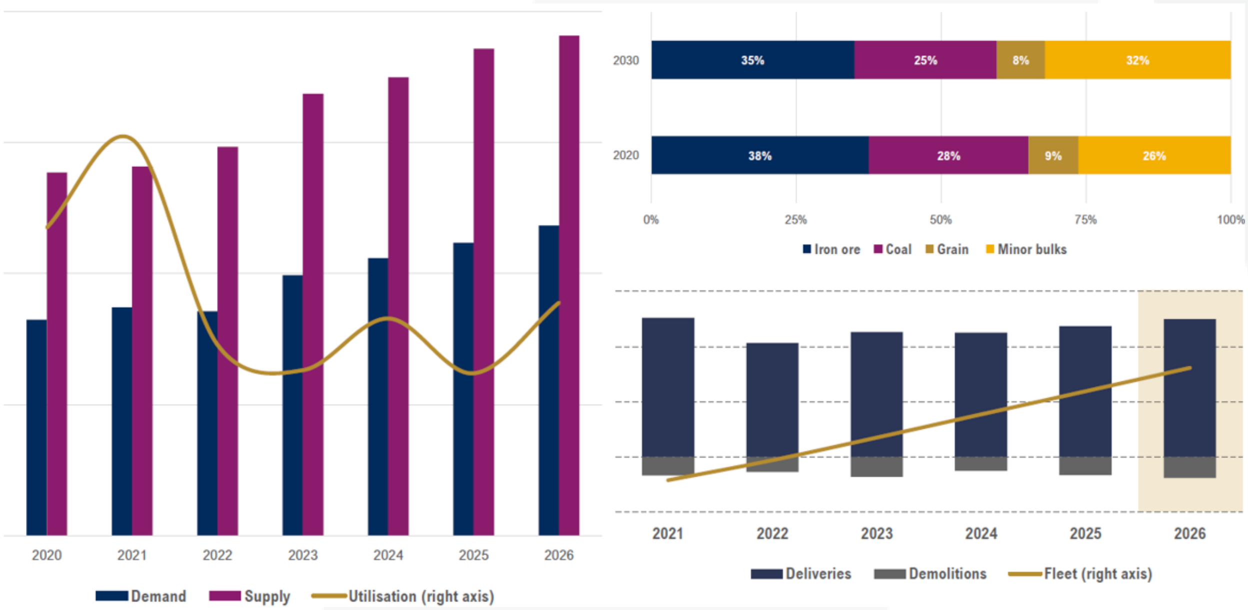
In summary, the global trade environment is becoming more fragmented and discriminatory, with tariff asymmetries driving trade diversion, reinforcing existing production hierarchies, and increasing the strategic importance of diversification, preferential access, and export competitiveness.

b. Global shipping industry

i. Global dry bulk market summary

In the latest webinar series – *Dry Bulk Shipping Market Outlook - February 2026* – Drewry explains how the industry is entering 2026 with improving trade fundamentals but rising supply-side pressure that could cap freight rate upside. Demand growth is supported by expanding bauxite shipments, rising South American soybean exports, and stronger steel demand from India, which collectively underpin positive rate expectations across vessel segments. However, a significant wave of vessel deliveries is expected to increase fleet capacity, potentially diluting utilisation gains. Structural shifts are also underway, including declining coal trade on larger vessels and growing demand linked to energy transition commodities such as spodumene. Regulatory tightening and decarbonisation measures will further influence fleet deployment, speed, and operating economics over the medium term. The following three figures illustrate the current market fundamentals:

Figure 16 – Market Fundamentals: LH: Utilisation of dry bulk fleet; RH Top: Demand; LH: Bottom: Supply



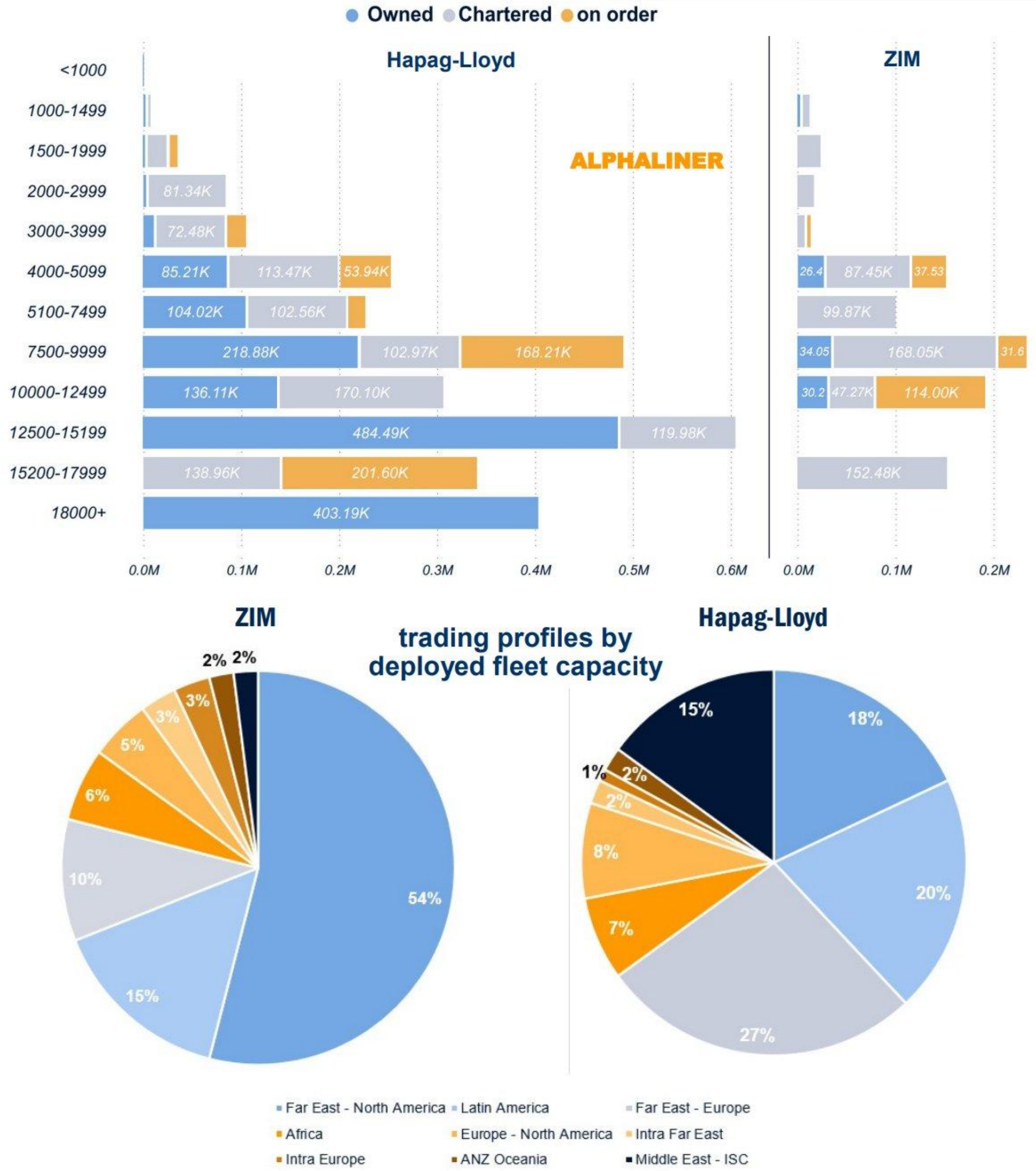
Source: [Drewry]

Ultimately, the dry bulk market outlook remains cautiously positive, with improving commodity demand offset by a significant expansion in fleet capacity, which is expected to constrain utilisation gains and limit sustained freight rate escalation in 2026.

ii. Global container market summary and capacity

Global demand continues to wane slightly, as overcapacity remains an issue. Moreover, the consolidation among carriers is accelerating with news this week. Hapag-Lloyd's planned **$4,2 billion acquisition of ZIM** represents the largest consolidation since COSCO's acquisition of OOCL and reflects intensifying competitive pressures amid declining freight rates and softening cargo volumes. The ensuing deployment of ZIM capacity will be interesting to monitor, as the composition and trade lanes of the respective carriers are quite different:

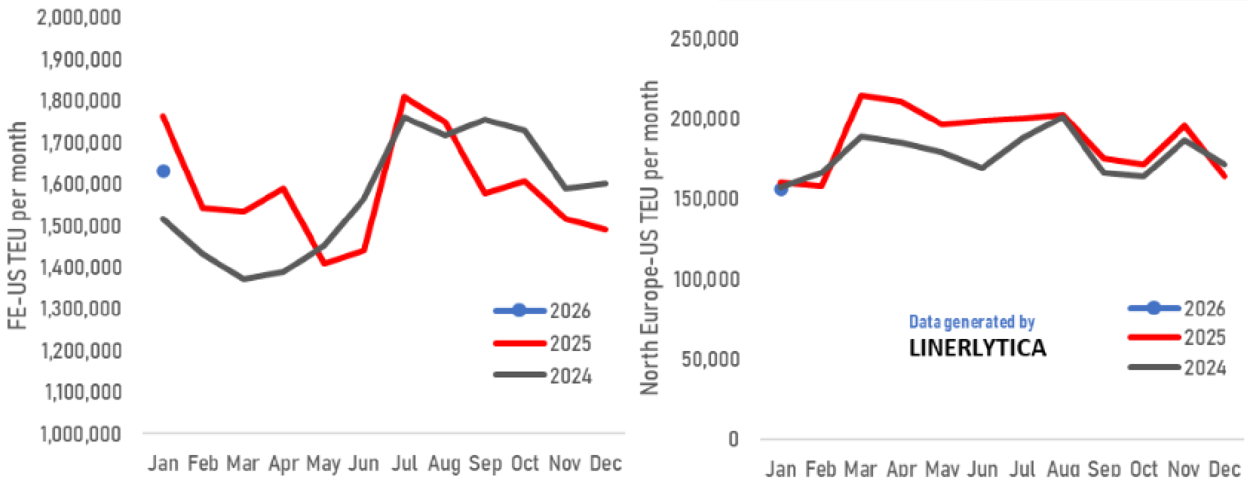
Figure 17 – Carriers' operating fleet and ownership (TEUs) & Trading profiles by deployed capacity (%)



Source: Alphaliner

Elsewhere, demand conditions remain subdued, particularly on the transpacific trade, where volumes declined by ↓**7,5%** in January due to tariff impacts and earlier front-loading of cargo, even as new services and additional capacity continue to be introduced, increasing the risk of a rate war.[12]

Figure 18 – Transpacific & Transatlantic container volume by month (2024-2026)



Source: Linerlytica

At the same time, carriers are aggressively managing supply through blank sailings, with 136 sailings cancelled in February (↑**122%** versus January), reflecting seasonal Chinese New Year weakness and broader demand softening.[13] Structural overcapacity remains a dominant medium-term concern, with the global orderbook equivalent to 34% of the existing fleet and excess capacity expected to persist until at least 2028. In response, carriers are rationalising networks, including a planned 37% reduction in transatlantic weekly capacity through alliance restructuring and service closures. Overall, consolidation, capacity withdrawals, and blank sailings reflect an industry attempting to rebalance supply-demand conditions amid weakening trade fundamentals.

iii. Global freight rates

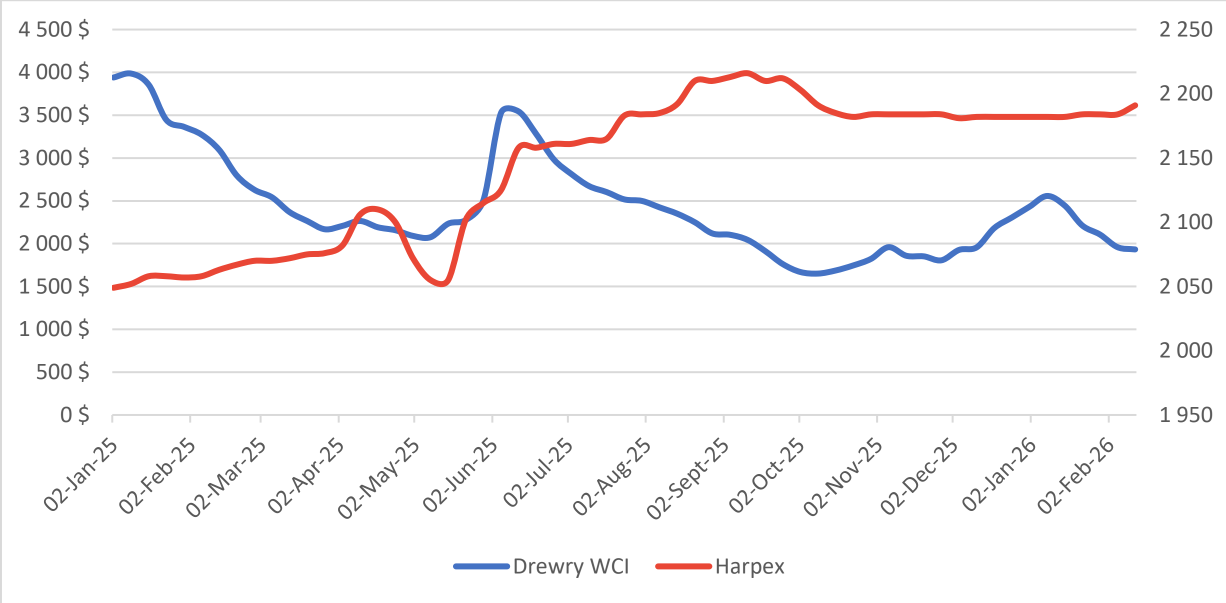
Global container freight rates have declined by another ↓**1,3%** (or **$26**) this week, falling to **$1,959 per 40-ft container**, according to Drewry's latest "*World Container Index (WCI)*".

The ongoing rate weakness reflects both structural and seasonal factors: rates peaked earlier than usual and have since softened amid subdued cargo demand and excess vessel capacity ahead of the Chinese New Year, with carriers already announcing widespread blank sailings to rebalance supply.[14] Drewry expects spot rates to decline slightly further in the coming weeks, as weak demand and elevated capacity continue to weigh on the market despite ongoing capacity management interventions by shipping lines.

Elsewhere, the charter market increased slightly this week, with the *Harpex Index* trading at **2,191 points**.[15] The following illustrates the divergent flows since the middle of last year:

[12] Linerlytica. 16/02/2026. Market Pulse – Week 7.
[13] Van Marle, G. 17/02/2026. Blanked sailings soar as carriers anticipating CNY slump.
[14] Van Marle, G. 13/02/2026. Ocean spots: early peak and pre-CNY volatility keep rates low.
[15] Harpex. 13/02/2026. Harper Petersen Charter Rates Index.

Figure 19 – World Container Index (2020-2025)

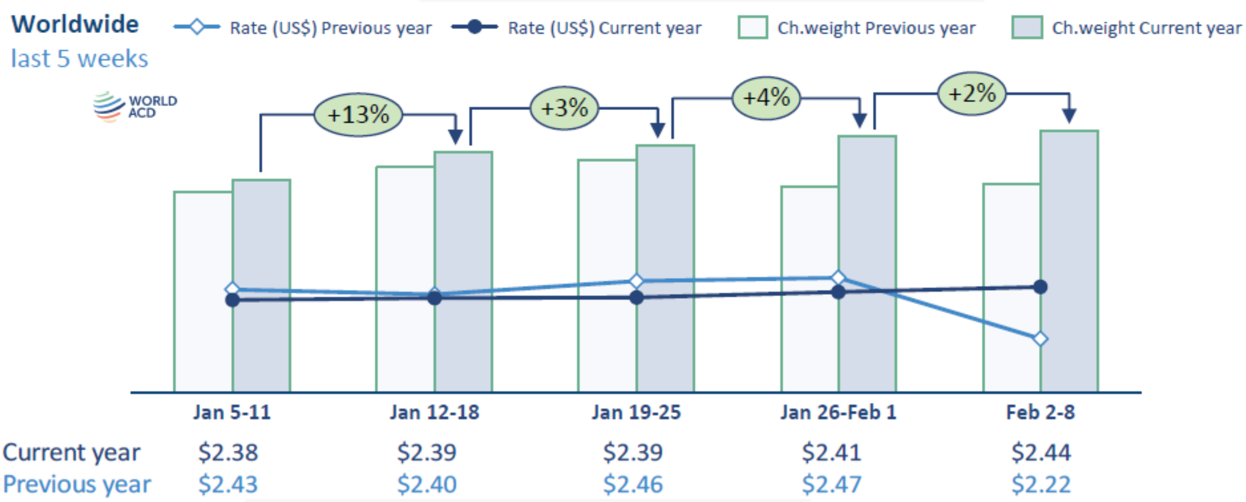


Source: Calculated from Drewry & Harpex

c. Global air cargo industry

According to the high-frequency data from WorldACD, global air cargo demand continued its recovery, with chargeable weight increasing by **↑2%** week-on-week, marking the 5th consecutive weekly gain following the year-end slump. Growth was driven primarily by strong rebounds from North America (**↑8%**) and the Middle East and South Asia (**↑7%**), reflecting restored capacity after weather disruptions and earlier geopolitical constraints.

Figure 20 – Chargeable weight and rates (past five weeks)



Source: World ACD

Flower exports from Central and South America declined after the Valentine's peak, while Asia-Pacific volumes remained broadly stable ahead of Lunar New Year factory closures. Overall, global chargeable weight increased by **↑6%** (y/y) and capacity expanded significantly (**↑25%**, y/y), indicating improved supply conditions. Rates rose modestly (**↑1%** over the past two weeks), suggesting a stable demand-capacity balance.

ENDS [16]

[16]**ACKNOWLEDGEMENT:**

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