

# Cargo Movement Update #273<sup>1</sup>

**Date: 15 March 2026**

## Weekly Snapshot

Table 1 – Port volumes and air cargo flows, week on week

Flows	Current <sup>2</sup>			Previous <sup>3</sup>			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	30,326	34,550	<b>64,876</b>	26,151	29,794	<b>55,945</b>	<b>↑16%</b>
Air Cargo (tons)	4,151	2,937	<b>7,088</b>	3,714	2,316	<b>6,030</b>	<b>↑18%</b>

## Monthly Snapshot

Figure 1 – Cyclical<sup>4</sup> monthly cargo volume, year on year (most metrics: Feb '25 vs Feb '26, % growth)

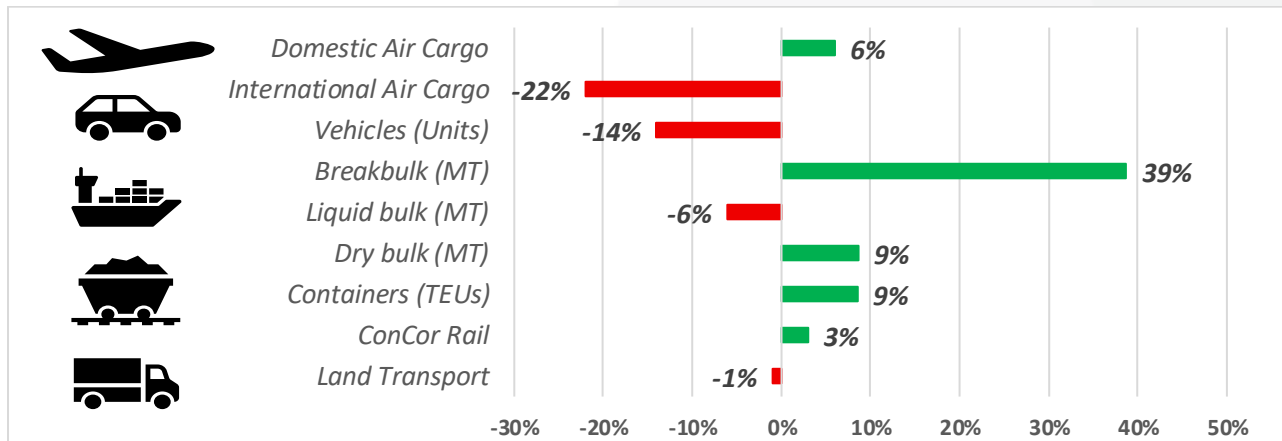
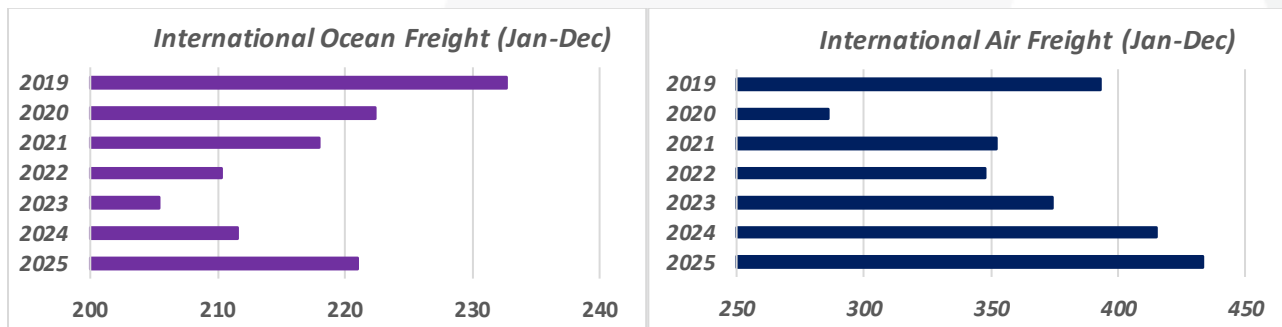


Figure 2 – Year-to-date flows 2019-2025<sup>5</sup>: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



## Key Notes

- An average of **9,268<sup>6</sup> TEUs** were handled per day, with **6,641 TEUs** projected for next week.
- TNPA Feb: TEUs: **↑9%** (m/m) & **↑9%** (y/y). Bulk: **↓19%** but **↑7%**. Vehicles: **↓20%** & **↓14%** (y/y).
- Rail cargo handled out of Durban was reported at **2,902** containers, up by **↑19%** from last week.
- Cross-border queue: **↓1,7 hrs**; transit: **↓1,8 hrs**; SA borders: **~8,2 hrs (↓20%)**; SADC: **~4,3 hrs (↓28%)**.
- Port congestion at the key hub ports across South Asia has started to ease following the initial disruptions
- Global air cargo markets opened 2026 with continued growth, with CTKs increasing by **↑5,6%** (y/y).

<sup>1</sup> This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 273<sup>rd</sup> update.

<sup>2</sup> 'Current' means the last seven days (a week's) of available data.

<sup>3</sup> 'Previous' means the preceding 8-14 days (a week) of available data.

<sup>4</sup> 'Monthly' means the last months' worth of available data compared to the same month in the previous year. Most: Jan vs. Jan.

<sup>5</sup> 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.

<sup>6</sup> 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 **9,268 TEUs** was handled daily, an increase from **6,641 TEUs** the previous week.

Port operations were plagued by some weather delays across various ports, leading to vessel changeovers. The truck booking system remains a challenge across ports, notably in Ngqura.

Global trade conditions remain subdued but structurally reconfiguring, with developing economies increasingly anchoring growth as South–South trade expands as a stabilising force. Trade flows are progressively reoriented toward intra-developing market exchanges, supported by Asia-centric value chains and strengthening Africa–Asia and Africa–Latin America linkages, which are offsetting weaker demand from advanced economies.

In global shipping, disruption in the Strait of Hormuz has exposed systemic dependence on a critical chokepoint, with limited viable alternatives and only partial substitution capacity. While initial congestion impacts across Asia have eased and delays remain contained, network instability persists through rate volatility, opportunistic cargo handling, and tightening bunker supply. The episode reinforces structural fragilities in hub-and-spoke networks and highlights underinvestment in multimodal resilience.

This week's international cargo flows bounced back after the significant reductions (mainly led by the Middle East airspace closures and regional security disruptions) experienced last week. Consequently, the daily average amounted to **~593,000 kg** inbound (**↑12%**, w/w) and **~420,000 kg** outbound (**↑27%**). Current volumes to and from ORTIA are again above the commensurate volumes of March last year (**↑16%**) and the pre-pandemic March of 2020 (**↑9%**).

Monthly, international air cargo volumes declined across all major South African gateways in February 2026 – Johannesburg (**↓13%**, m/m; **↓18%**, y/y), Cape Town (**↓27%**, m/m; **↓35%**, y/y), and Durban (**↓17%**, m/m; **↓4%**, y/y) – resulting in total international air cargo throughput falling by **↓22%** year-on-year compared with February 2025. Domestic air cargo volumes broadly strengthened in February 2026 – Johannesburg (**↑17%**, m/m; **↑19%**, y/y) and Cape Town (**↑20%**, m/m; **↓12%**, y/y) recorded monthly gains, while Durban declined sharply (**↓42%**, m/m; **↑2%**, y/y) – resulting in total domestic air cargo throughput increasing by **↑6%** both month-on-month and year-on-year.

Global air cargo markets remain resilient in January, with latest demand (CTKs) figures from IATA expanding by **↑5,6%** (y/y) (**↑7,2%** international), outpacing capacity growth (ACTKs **↑3,6%**), and modest load factor gains indicating broadly balanced market conditions despite emerging capacity constraints and regional divergence. Growth continues to be led by Africa, the Middle East, and Asia-Pacific, while structural drivers – particularly e-commerce, trade reconfiguration, and AI-related flows – sustain air cargo's outperformance relative to broader global trade.

According to the high-frequency data from WorldACD, global air cargo volumes have softened, with chargeable weight declining by **↓4%** (w/w) and **↓12%** (y/), amid widespread disruptions – particularly in the Middle East – driven by sharp capacity reductions of over 30% week-on-week. Despite weaker volumes, rates have increased by approximately **↑6%** week-on-week to around **\$2,40/kg**, indicating a tightening market where supply-side constraints, rather than demand strength, are driving pricing dynamics.

On the N4 corridor, movements decreased very marginally for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **1 train per day**) were stable this week. Truck volumes through the border post decreased to around **1,446 HGVs per day** (**↓0,4%**, w/w). Overall queue times decreased slightly to an

average of **~3,1 hours** (↓**21%**) at the border. The average processing times also decreased slightly to an average of **~3,0 hours** (↓**14%**) per crossing.

Weekly figures in the SADC region show that the average queue time decreased by nearly **an hour and three-quarters** from last week, while transit time decreased by almost **the same magnitude**. The median border crossing times at South African borders decreased by **two hours** on average, averaging **~8,2 hrs** (↓**20%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) also decreased, going down by **an hour and three-quarters**, averaging **~4,3 hrs** (↓**28%**). This week, on average, three SADC borders took more than a day to cross, namely Kasumbalesa (the worst affected, taking around **a day and a half** to cross), Katima Mulilo, and Kazungula.

Cross-border developments this week included **(1)** worsening congestion and driver-related queue management issues at Groblersbrug, compounded by **rain-related road closures in Botswana**, **(2)** a prolonged **power outage at Beitbridge** which halted processing for much of Thursday, and **(3)** severe **system-related congestion at Kazungula and other Zambian borders following the ASYCUDA outage**, with truck queues extending up to **17 km** and delays of up to **seven days** before conditions began normalising toward the end of the week.

Summarising this edition, our attention again goes global to the geopolitical crisis. Despite modest gains in February port performance, South Africa risks underutilising a strategic opportunity arising from shifting global shipping dynamics around the Strait of Hormuz and broader geopolitical disruptions. TNPA data shows container throughput increased to **387,107 TEUs** (↑**9%**, m/m; ↑**9%**, y/y), while bulk volumes declined to **19.3 million tonnes** (↓**19%**, m/m; ↑**7%**, y/y) and vehicle volumes fell by **↓20%** (m/m) and **↓14%** (y/y), reflecting uneven recovery patterns. While container growth is encouraging, it remains insufficient relative to rising global rerouting potential, where South Africa should be positioning itself as a key servicing and transshipment hub. However, as often mentioned, failure to improve reliability, efficiency, and ancillary maritime services risks forfeiting these gains to better-performing competitor ports.

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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.

As mentioned throughout the start of this year, 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.

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

7-day flow reported (09/03/2026 – 15/03/2026)			
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)	2,601	18,206	↑33%
Cape Town Container Terminal	2,706	18,945	↑20%
Ngqura Container Terminal	2,172	15,202	↓7%
Port Elizabeth Container Terminal	398	2,785	↑78%
Other	1,391	9,738	↑12%
<b>Total</b>	<b>9,268</b>	<b>64,876</b>	<b>↑16%</b>

Source: Calculated from TPT, 2026. Updated 15/03/2026.

An elevated average of ~9,268 TEUs (↑16%) was handled per day for the last week (9 to 15 March, Table 2). Consequently, throughput was above the projected average of ~6,641 TEUs (↑40% actual versus projected). For the coming week, a decreased average of ~6,641 TEUs (↓28%) is predicted to be handled (16 to 22 March, Table 3).

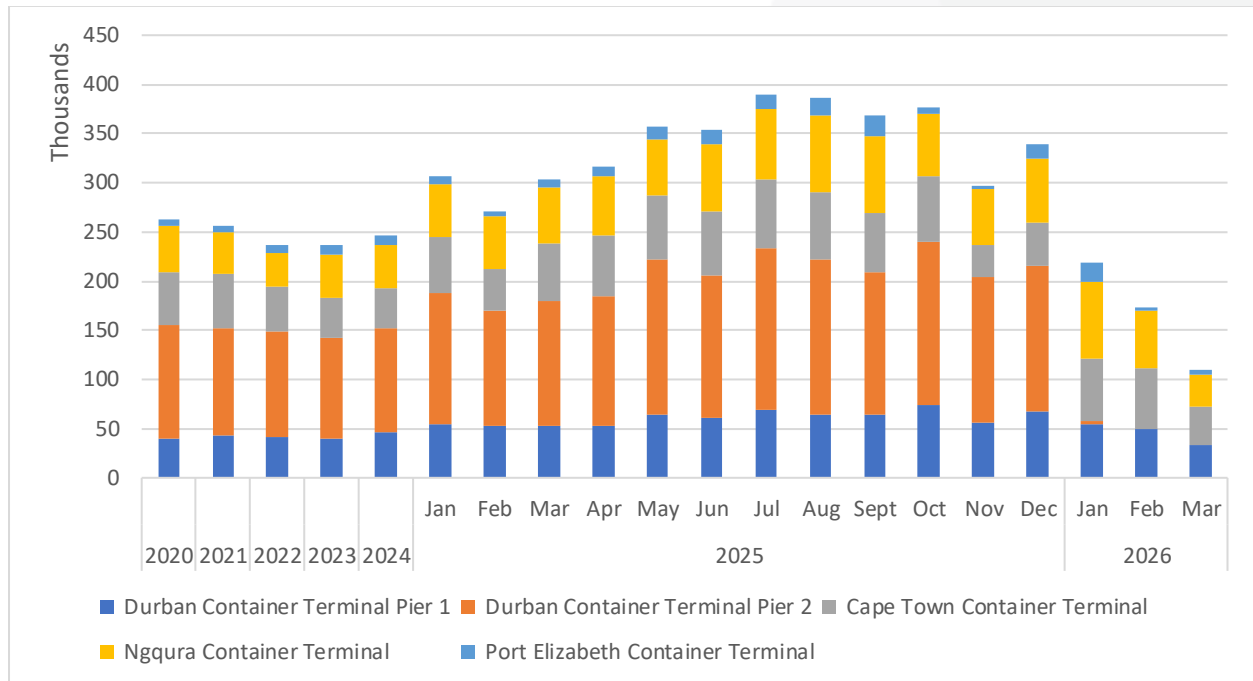
Table 3 – Container Ports – Weekly flow projected for 16 to 22 March (measured in TEUs)

7-day flow projected (16/03/2026 – 22/03/2026)			
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)	1,669	11,686	↓36%
Cape Town Container Terminal	1,742	12,192	↓36%
Ngqura Container Terminal	1,774	12,415	↓18%
Port Elizabeth Container Terminal	348	2,439	↓12%
Other	1,108	7,758	↓20%
<b>Total</b>	<b>6,641</b>	<b>46,489</b>	<b>↓28%</b>

Source: Calculated from TPT, 2026. Updated 15/03/2026.

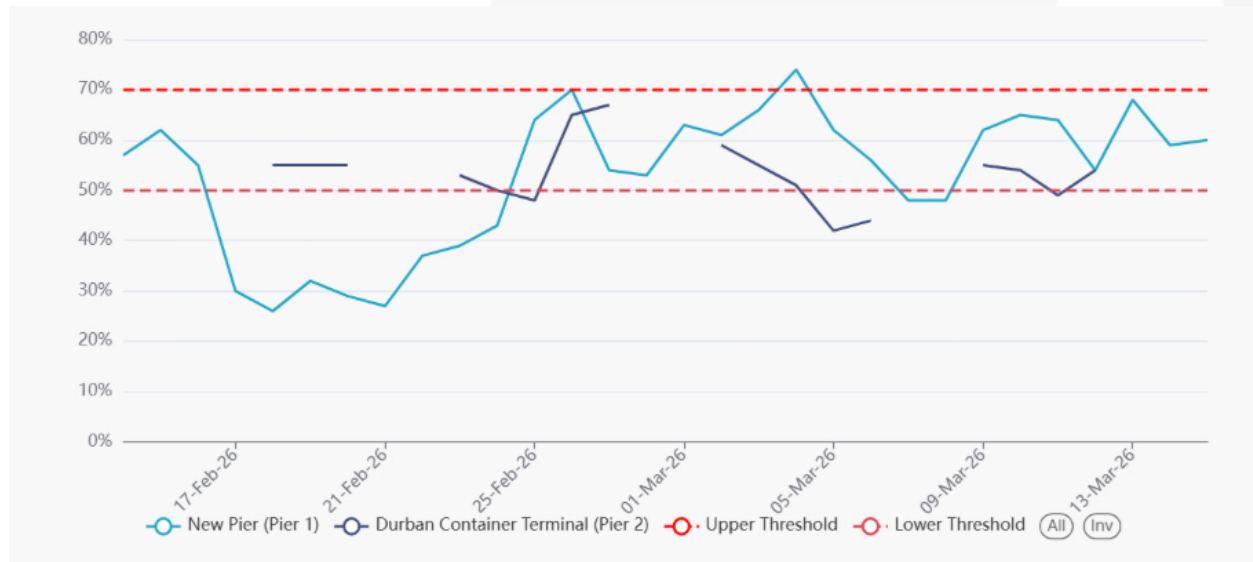
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2026, and updated 15/03/2026.

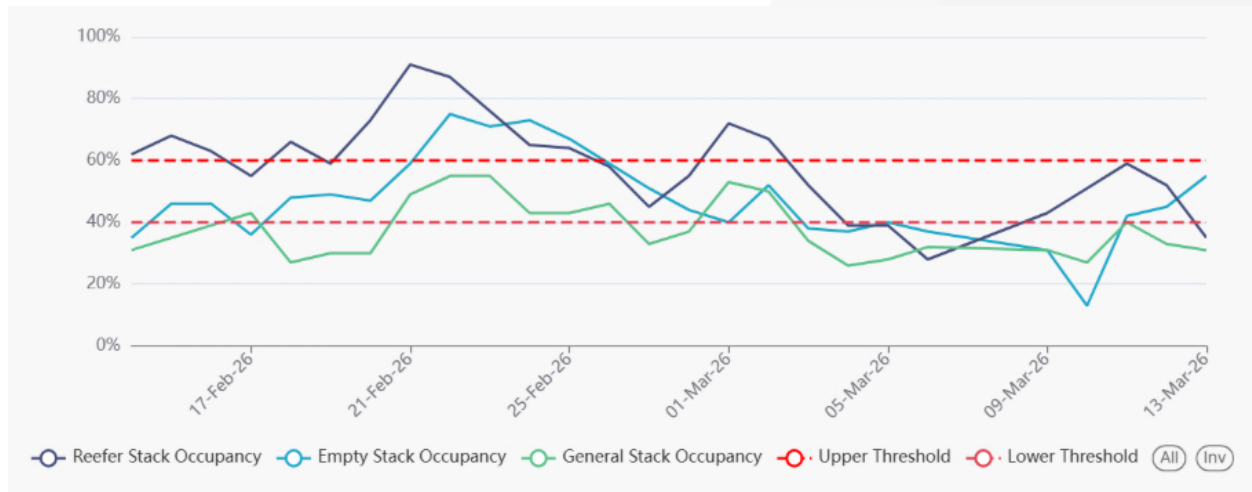
Figure 4 – Stack occupancy in Durban, general-purpose containers (12 February to present; day on the day)



Source: Calculated using data from Transnet, 2026, and updated 15/03/2026.

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 (12 February to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 15/03/2026.

**b. TNPA: February update**

TNPA has released consolidated port statistics for February<sup>7</sup>, with the figures showing that:

- Container throughput totalled **387,107 TEUs**, which is up by **↑9%** (m/m) and **↑9%** (y/y).
- Total bulk cargo totalled **19,3 million tonnes**, which is down by **↓19%** (m/m), but up by **↑7%** (y/y).
- Vehicle throughput totalled **54,012 units**, which is down by **↓20%** (m/m) and **↓14%** (y/y).

The narrative around these figures centres around a substantial increase in containers and a significant decrease in dry bulk cargoes. The following table shows the respective changes versus December:

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

	Jan	Feb	Movement	% change
<b>Containers (TEUs)</b>	<b>353,825</b>	<b>387,107</b>	<b>33,282</b>	<b>9%</b>
Landed	186,554	191,028	4,474	2%
Shipped	167,271	196,079	28,808	17%
<b>Dry bulk (MT)</b>	<b>20,107,798</b>	<b>15,907,525</b>	<b>-4,200,273</b>	<b>-21%</b>
<b>Liquid bulk (MT)</b>	<b>3,230,888</b>	<b>2,691,316</b>	<b>-539,572</b>	<b>-17%</b>
<b>Breakbulk (MT)</b>	<b>470,391</b>	<b>667,862</b>	<b>197,471</b>	<b>42%</b>
<b>Vehicles (Units)</b>	<b>67,761</b>	<b>54,012</b>	<b>-13,749</b>	<b>-20%</b>
<b>Total cargo (excl. Vehicles)</b>	<b>23,809,077</b>	<b>19,266,703</b>	<b>-4,542,374</b>	<b>-19%</b>

Source: [TNPA](#), updated 15/03/2026.

Transnet Port Terminals handled more than **387 thousand containers** and **19 million metric tonnes** of bulk cargo during February. Dry bulk was the most significant mover, down by **↓21%** (m/m), followed by liquid bulk, down by **↓17%** (m/m). Vehicle trade was also down (**↓20%**), and significantly down on the average monthly flows since 2021 (**↓19%** - at around **66,400 units**). Looking at the cyclical figures, the following table shows the respective changes versus February of last year and pre-pandemic:

<sup>7</sup> Transnet. 2025. [Port statistics](#).

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

	2020	2025	2026	% 20-'26	% '25-'26
<b>Containers (TEUs)</b>	<b>394,719</b>	<b>356,584</b>	<b>387,107</b>	<b>-2%</b>	<b>9%</b>
Landed	188,856	174,415	191,028	1%	10%
Shipped	205,863	182,169	196,079	-5%	8%
<b>Dry bulk (MT)</b>	<b>15,043,392</b>	<b>14,641,436</b>	<b>15,907,525</b>	<b>6%</b>	<b>9%</b>
<b>Liquid bulk (MT)</b>	<b>4,118,155</b>	<b>2,865,590</b>	<b>2,691,316</b>	<b>-35%</b>	<b>-6%</b>
<b>Breakbulk (MT)</b>	<b>325,649</b>	<b>481,650</b>	<b>667,862</b>	<b>105%</b>	<b>39%</b>
<b>Vehicles (Units)</b>	<b>60,795</b>	<b>62,871</b>	<b>54,012</b>	<b>-11%</b>	<b>-14%</b>
<b>Total cargo (excl. Vehicles)</b>	<b>19,487,196</b>	<b>17,988,676</b>	<b>19,266,703</b>	<b>-1%</b>	<b>7%</b>

Source: [TNPA](#), updated 15/03/2026.

Compared to yearly trends, gains are evident across several sub-sectors, with containers (↑10%) and breakbulk (↑39%) leading the way. The only contractions are with vehicles (↓14%) and liquid bulk (↓6%), which mirrors the situation reported last month. Collectively, the figures remain positive and build on the decent start made by the terminals since January. For 2026, our internal forecasts demonstrate that South Africa can confidently achieve growth rates of between ↑2,5% to ↑4,2% for the year.

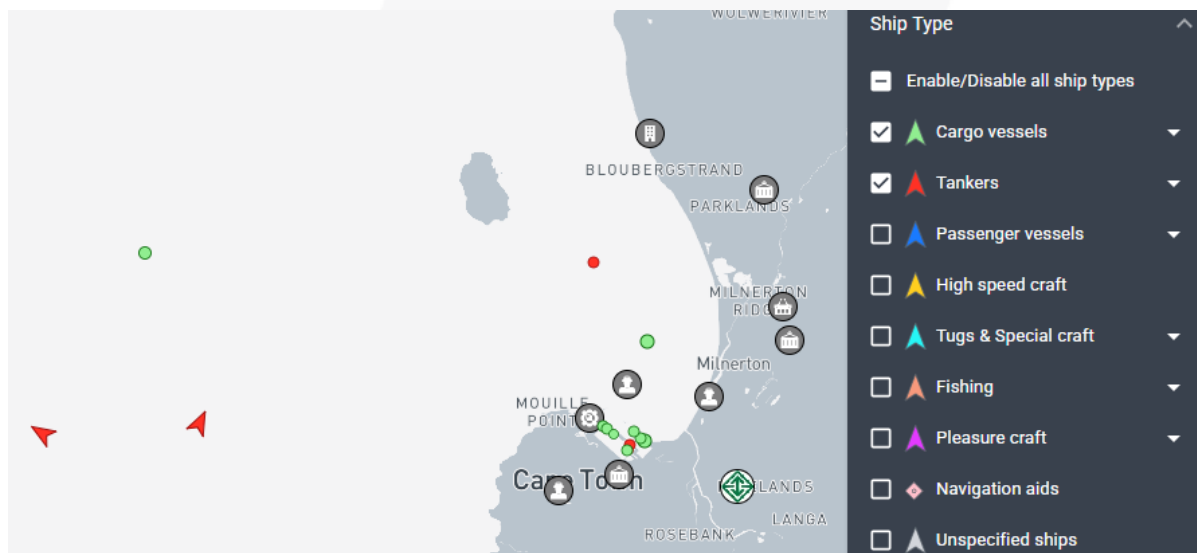
### c. Summary of port operations

#### i. Cape Town

The Cape Town Container Terminal started the week with minor weather delays; the weather cleared up on Tuesday and remained clear throughout the rest of the week. Equipment availability remained consistent, with eight out of 9 cranes and 28 out of 32 RTGs available on average across the week. The delays built up by continuous weather delays have cleared, in part due to better weather conditions, and in part due to some vessel shuffling, with no vessels at anchorage reported at CTCT by the end of the week.

The Cape Town Multi-Purpose Terminal had a quiet week starting the weekend, with no vessels at berth. No weather delays were reported, along with a near full complement of container handling equipment for the week, with an average of two out of three cranes and three out of four straddle carriers available.

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



Source: Marine Traffic. Updated 15/03/2026 at 14:00.

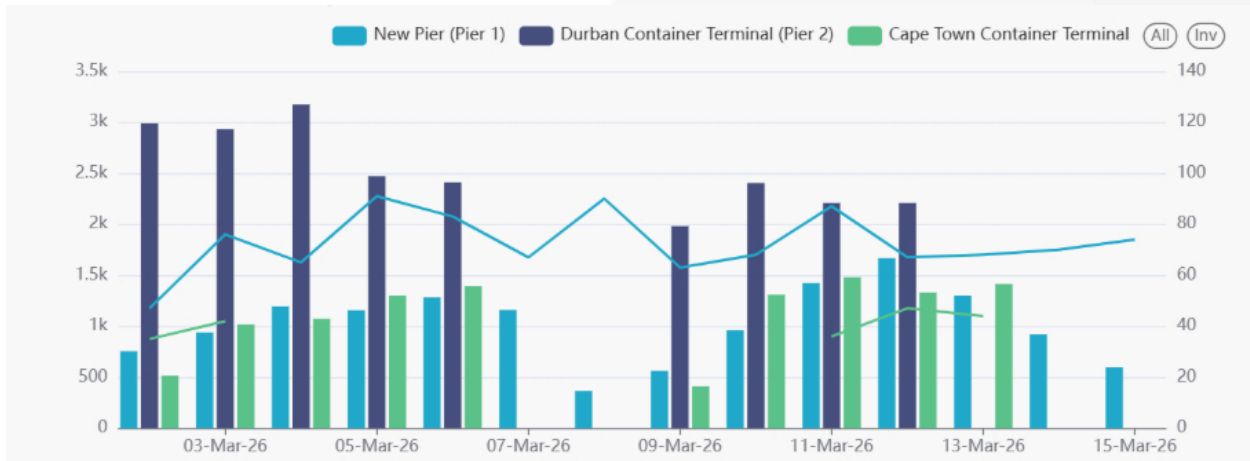
**ii. Durban**

Pier 1 had an average of two vessels at anchorage throughout the week, with an increase in waterside volumes from the previous week. The terminal reported an average of five out of seven cranes and 16 out of 25 RTGs, consistent with previous weeks. Truck turnaround time averaged **71 minutes (↓4%, w/w)** and staging **49 minutes (↓38%)**.

Durban Multi-Purpose Terminal had a busier week than last, with an increase in volumes on the waterside. The terminal reported an average of three out of four cranes, with the fourth crane on long outage until May. The terminal had a relatively good berth occupancy.

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.

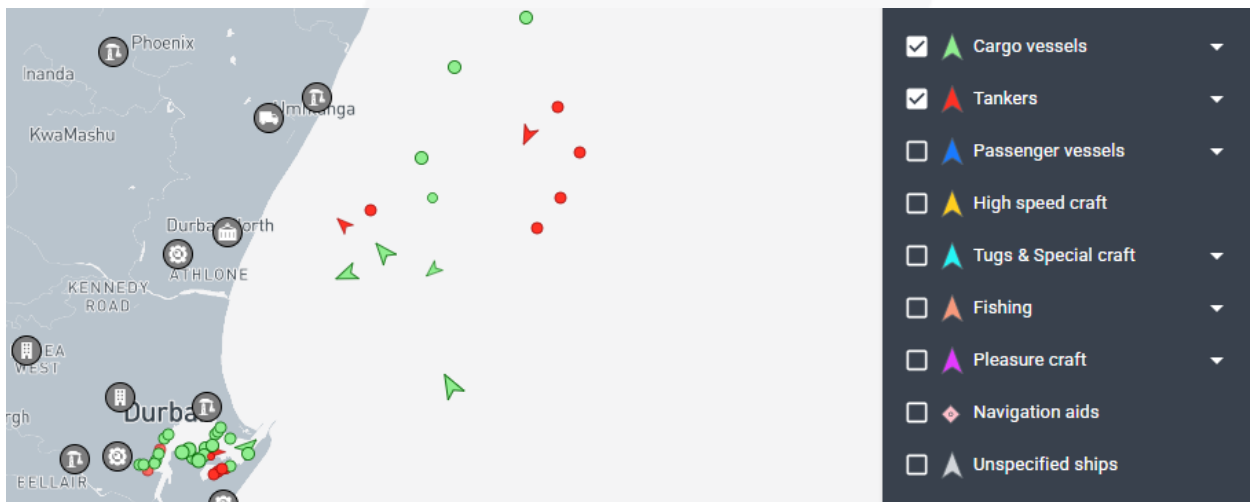
Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 15/03/2026.

The queue of container vessels waiting outside Durban decreased this week. On Wednesday afternoon (17 March), **zero** container vessels were waiting outside at anchorage for Durban. The queue of dry (**four**), liquid (**six**), and breakbulk (**one**) vessels also decreased slightly from last week:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 15/03/2026 at 14:00.

**iii. Eastern Cape**

Ngqura Container Terminal reported weather delays throughout the week, with a reduction in waterside volumes, with some of the conditions leading to vessels omitting the port and calling at Cape Town instead. The terminal had an average of seven out of eight cranes and 24 out of 30 RTGs available throughout the week. Though the terminal reports an average truck turnaround time of 37 minutes, some reports indicate that the booking system is constrained.

Port Elizabeth Container Terminal reported minor weather delays throughout the week, clearing up towards the end of the week, with a significant increase in waterside volumes. The terminal reported two out of three cranes (with the third on long outage) and 10 out of 11 straddle carriers.

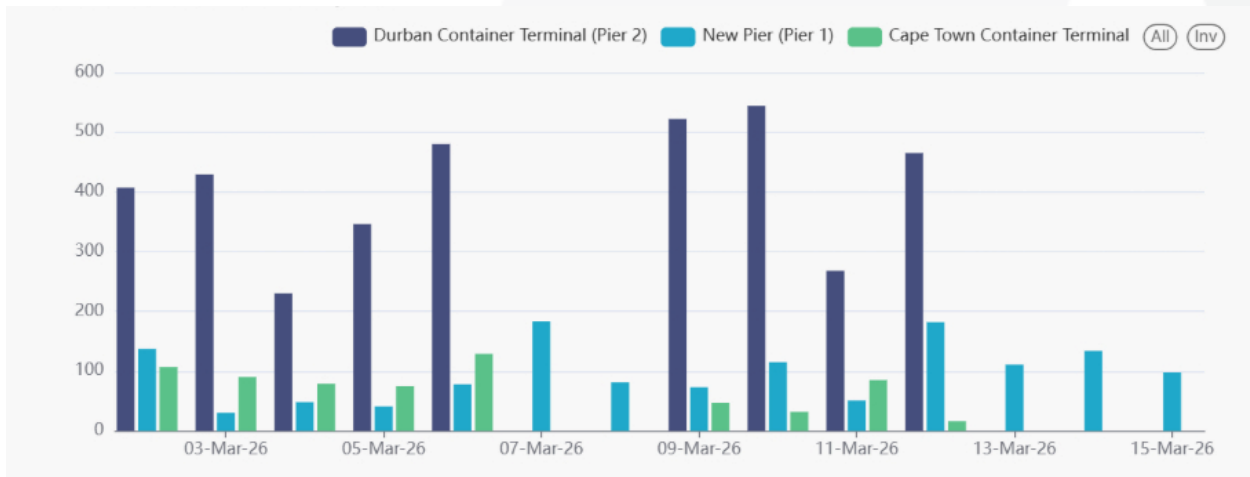
**iv. Richards Bay**

The daily average coal throughput for the week **decreased** and averaged around **162,500 tons (↓13%, w/w)** a day. An average of **24 trains** was serviced on the landside (**slightly higher** than last week’s 22), and **above** the target (of 22 trains).

**v. Transnet Freight Rail (TFR)**

In the last week (9 to 15 March), rail cargo on the ConCor line out of Durban was reported at **2,902 containers** (despite the lack of data for DGT for 28 February/1 March), up by **↑19%** from the previous week’s **2,431 containers**.

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



Source: Calculated using data from Transnet, 2025. Updated 15/03/2026.

**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 March). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in March 2025 averaged **~876,122 kg**.

Table 6 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	592,963	4,150,738	↑12%
Volume outbound	419,579	2,937,054	↑27%
Total	1,012,542	7,087,792	↑18%

Courtesy of ACOC. Updated: 15/03/2026.

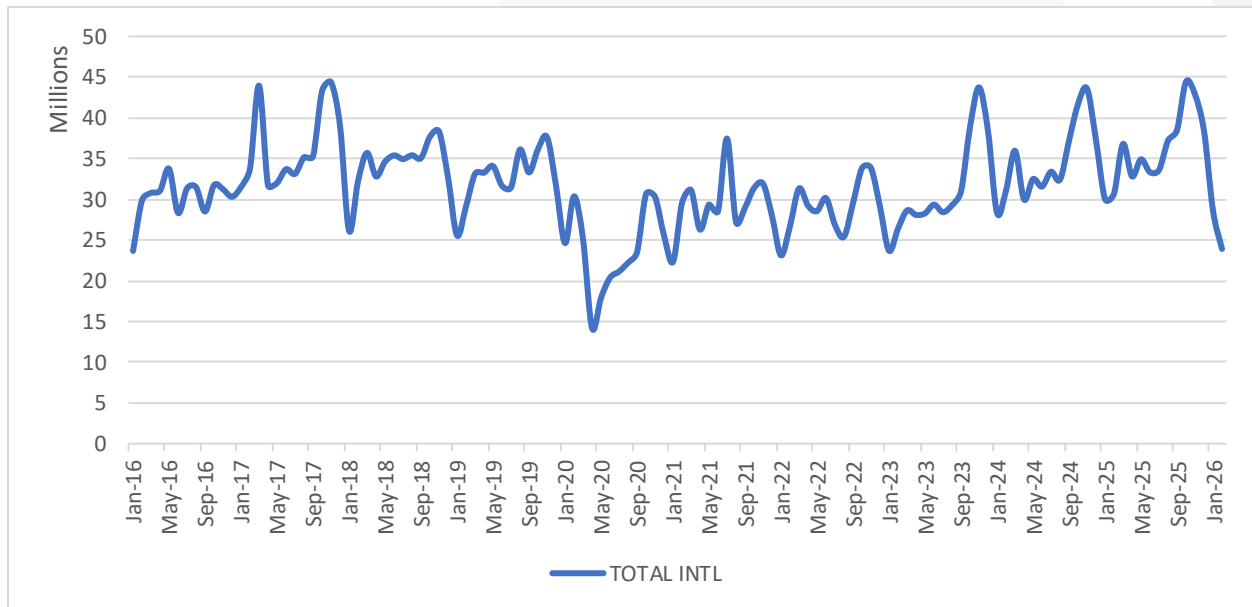
This week’s international cargo flows bounced back after the significant reductions (mainly led by the Middle East airspace closures and regional security disruptions) experienced last week. Consequently, the daily average amounted to ~593,000 kg inbound (↑12%, w/w) and ~420,000 kg outbound (↑27%). Current volumes to and from ORTIA are again above the commensurate volumes of March last year (↑16%) and the pre-pandemic March of 2020 (↑9%).

For the full month of February, some of the global reductions have manifested themselves in our figures:

- Johannesburg decreased by ↓13% (m/m) versus January and is down by ↓18% (y/y) versus 2025.
- Cape Town also decreased by ↓27% (m/m) and by ↓35% (y/y) versus 2025.
- Durban also decreased by ↓17% (m/m) and by ↓4% (y/y) versus 2025.
- Consequently, total international air cargo for February 2026 was down by ↓22% (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: 15/03/2026.

Operationally, the following updates are worth noting this week:

- ACSA has initiated a major **capacity expansion and modernisation of air cargo infrastructure at ORTIA**, centred on a proposed New Cargo Precinct (Midfield Cargo Complex) that will add ~750,000 tonnes per annum capacity and ~75,000 m<sup>2</sup> of warehousing, addressing current constraints in the existing western precinct.

- The project is currently in the **EIA scoping phase**, with stakeholder consultation underway (public comment open until 20 April 2026), and will proceed to detailed impact assessment before environmental authorisation is granted.
- In parallel, **short- to medium-term operational improvements are being implemented**, including a large-scale refurbishment of existing cargo warehouse facilities (34,700 m<sup>2</sup> warehouse plus offices), upgrades to critical systems, and reconfiguration of cargo access to improve traffic flow and efficiency, with completion targeted for December 2027.
- From an operational risk perspective, **jet fuel supply remains stable (≈3 weeks of cover)**, but the system is exposed to geopolitical risks – particularly Middle East crude supply disruptions – given South Africa’s increased reliance on imports following refinery closures.
- Overall, the developments reflect a **dual-track strategy**: immediate efficiency gains through refurbishment and process optimisation, alongside longer-term structural expansion to support air cargo growth and trade facilitation.

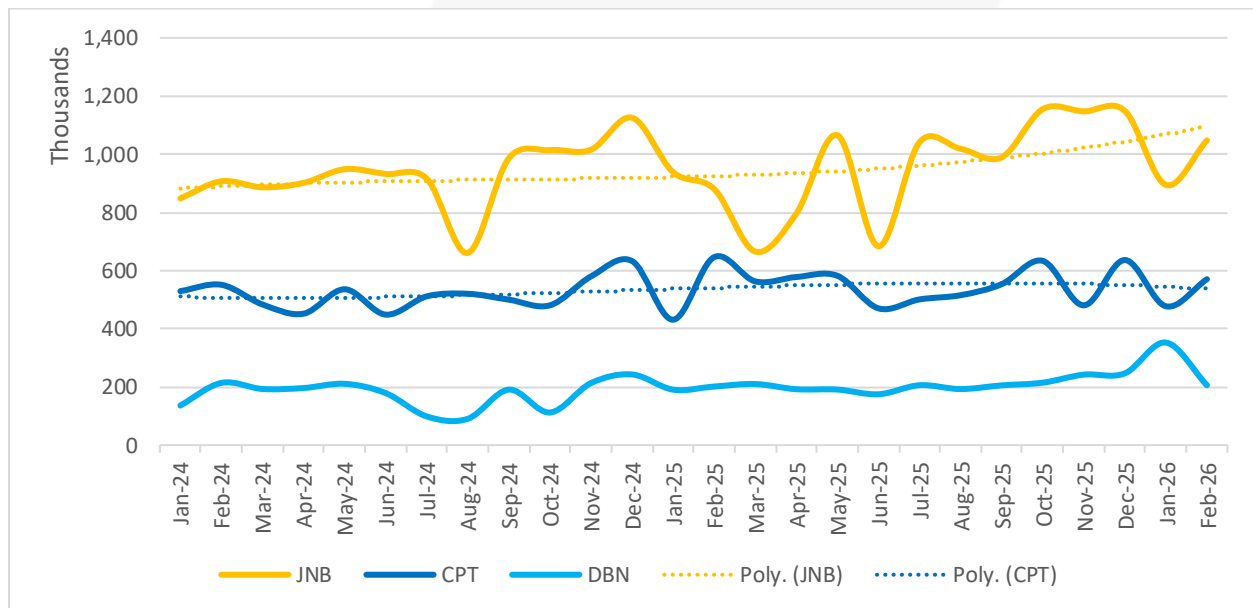
### b. Domestic air cargo

For the whole month of February, unlike international volumes, domestic volumes handled at our three main terminals mostly increased versus January, with annual volumes also broadly up:

- Johannesburg increased by **↑17%** (m/m) versus January and is up by **↑19%** (y/y) versus 2025.
- Cape Town increased by **↑20%** (m/m) but is down by **↓12%** (y/y) versus 2025.
- Durban decreased by **↓42%** (m/m – after the same magnitude of increase last month) but is similar to last year’s level (**↑2%**).
- Consequently, total monthly domestic air cargo for February was up by **↑6%** month-on-month and year-on-year.

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 15/03/2026.

### 3. Road and Regional Update

#### a. Lebombo border post update

In the last week (9 to 15 March), movements decreased very marginally for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **1 train per day**) were stable this week.

- Truck volumes through the border post decreased to around **1,446 HGVs per day** (↓0,4%, w/w).
- Overall queue times decreased slightly to an average of **~3,1 hours** (↓21%) at the border.
- The average processing times also decreased slightly at an average of **~3,0 hours** (↓14%) per crossing.

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

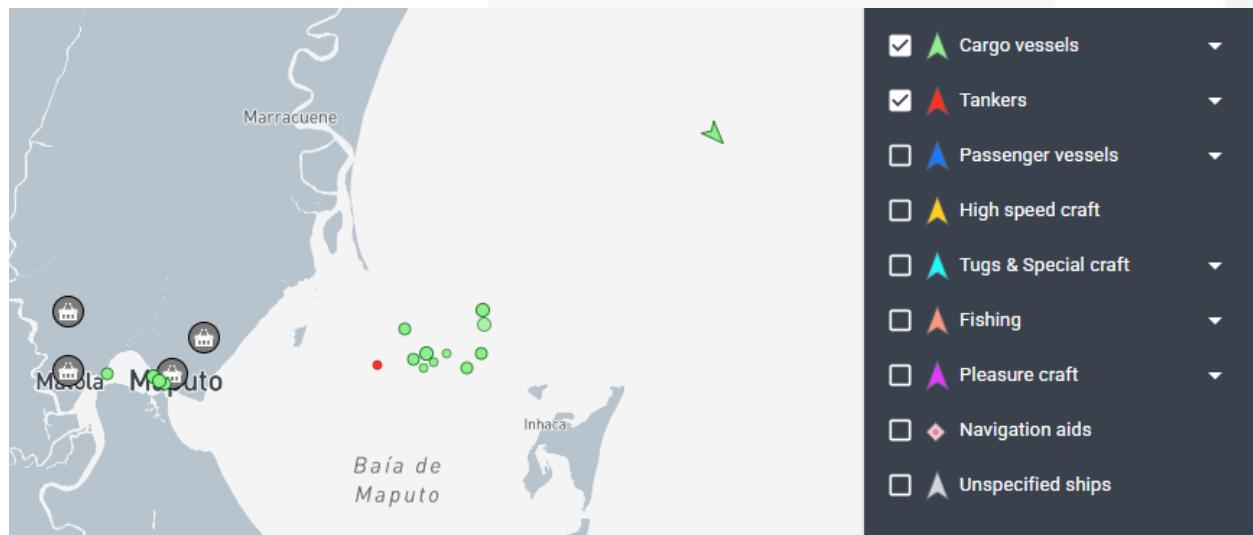
Table 7 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,446	1,381	1,113	195	44	67	31	248
% (w/w)	0%	-1%	1%	-4%	-19%	12%	-9%	-2%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 15/03/2026.

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 15/03/2026 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 nearly **an hour and three-quarters** from last week, while transit time decreased by almost **the same magnitude**.
- The median border crossing times at South African borders decreased by **two hours** on average, averaging **~8,2 hrs** (↓20%) for the week.

- In contrast, the greater SADC region (excluding South African-controlled) also decreased, going down by **an hour and three-quarters**, averaging **~4,3 hrs (↓28%)**.
  1. **Groblersbrug Border Post:**
    - a. Conditions deteriorated significantly, with transporters reporting **waiting times of up to four days to cross**.
    - b. **Queue-jumping behaviour by drivers** has worsened congestion. Some trucks reportedly bypass the main queue and park closer to border offices to obtain receipts allowing entry into the secondary queue.
    - c. **Heavy rainfall in Botswana** around Ramma lands led to the **temporary closure of the B140 road** toward Groblersbrug.
    - d. Transporters were advised to **divert to alternative crossings**, and **pre-cleared vehicles** were authorised to proceed via other border posts.
  2. **Beitbridge Border Post**
    - a. Operations were disrupted on Thursday morning due to a **power outage on the South African side**.
    - b. The **backup generator failed to start**, leaving the border without power for most of the day.
    - c. Technicians restored the system **shortly before 8:00 p.m. on Thursday**, after which processing resumed.
  3. **Kazungula Border Post:**
    - a. **Severe congestion developed**, with approximately **640 trucks waiting to cross the Zambezi** and a queue stretching around **17 km**.
    - b. Delays stemmed largely from **last week's outage of the ASYCUDA customs system**, which prevented transporters from generating Payment Registration Numbers (PRNs) electronically.
    - c. During the outage, **PRNs had to be issued manually by customs officials**, creating significant processing delays.
    - d. Some transporters reported **waiting up to seven days** to enter Zambia.
    - e. Truck stops in Kazungula were **at full capacity**, forcing additional trucks to park along public roads.
  4. **Nakonde Border Post / Tunduma Border Post:**
    - a. **Double-queue congestion** was reported at the Nakonde–Tunduma crossing, reflecting the broader regional knock-on effects from the ASYCUDA disruption.
    - b. By Friday morning, reports indicated that **Zambian border operations had largely returned to normal**, with system functionality restored and queues beginning to clear.

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

Table 8 – Delays<sup>8</sup> summary – South African borders<sup>9</sup> (both directions)

Border Post	Direction	HGV <sup>10</sup> 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	497	18.4	4.4	18.2	14,910	3,479
Beitbridge	Zimbabwe-SA	211	3.9	1.3	3.5	6,330	1,477

<sup>8</sup> 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.

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

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

Border Post	Direction	HGV <sup>10</sup> Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Groblersbrug	SA-Botswana	240	18.4	2.5	18.2	7,200	1,680
Martin's Drift	Botswana-SA	180	3.8	1.2	3.5	5,400	1,260
Kopfontein	SA-Botswana	202	6.9	2.1	6.5	6,060	1,414
Tlokweng	Botswana-SA	22	0.5	0.2	0.3	660	154
Violsdrift	SA-Namibia	30	5.8	1.3	5.5	900	210
Noordoewer	Namibia-SA	20	2.6	0.5	2.4	600	140
Nakop	SA-Namibia	30	4.2	1.1	4.1	900	210
Ariamsvlei	Namibia-SA	20	1.0	0.3	0.6	600	140
Skilpadshek	SA-Botswana	270	7.2	2.3	7.1	8,100	1,890
Pioneer Gate	Botswana-SA	58	1.7	0.0	0.0	1,740	406
Ramatlhabama	SA-Botswana	167	3.0	1.1	2.6	5,010	1,169
Ramatlhabama	Botswana-SA	70	0.4	0.1	0.3	2,100	490
Lebombo	SA-Mozambique	1,443	3.1	0.5	3.0	43,290	10,101
Ressano Garcia	Mozambique-SA	1,377	1.6	0.2	1.3	41,310	9,639
<b>Sum/Average</b>		<b>4,837</b>	<b>5.2</b>	<b>1.2</b>	<b>4.8</b>	<b>145,110</b>	<b>33,859</b>

Source: [TransAfricaBorder](http://TransAfricaBorder), week ending 08/03/2026.

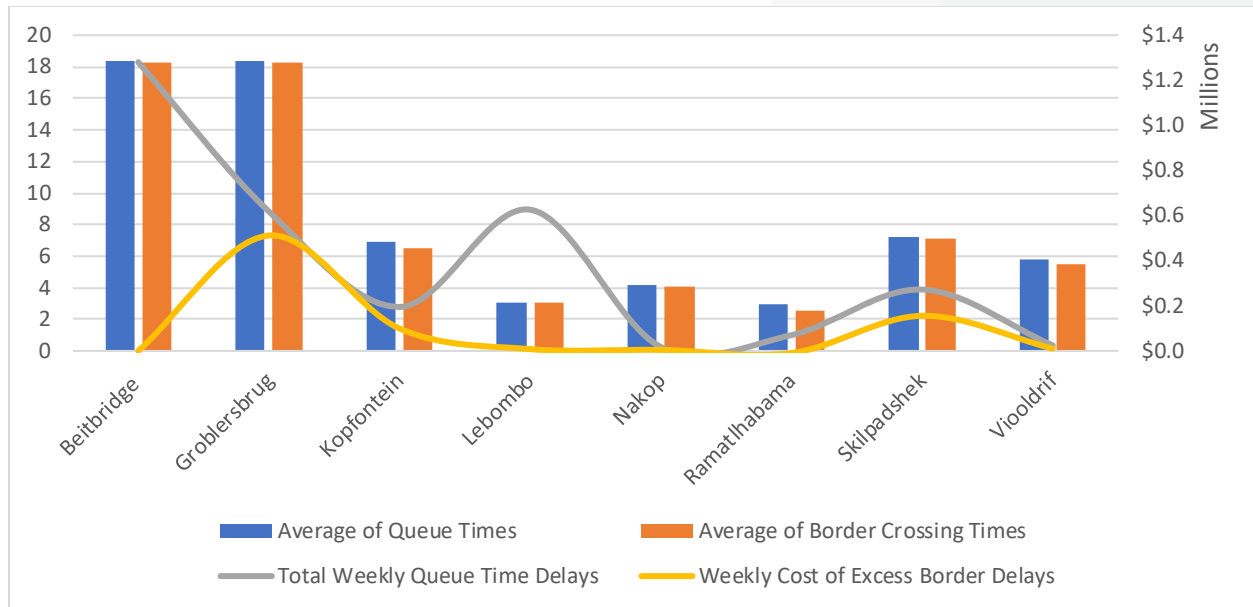
Table 9 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	8.4	3.4	8.0	9,600	2,240
Central Corridor	798	0.6	0.1	0.5	23,940	5,586
Dar Es Salaam Corridor	1,819	11.0	2.6	10.9	54,570	12,733
Maputo Corridor	2,820	2.4	0.4	2.2	84,600	19,740
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,273	9.8	2.1	9.7	98,190	22,911
Northern Corridor	2,817	0.3	0.1	0.2	92,520	21,588
WBNLD Corridor	819	3.7	0.9	3.3	24,570	5,733
Trans Cunene Corridor	100	3.4	0.8	3.1	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	22.7	1.5	22.5	3,480	812
<b>Sum/Average</b>	<b>13,109</b>	<b>4.9</b>	<b>1.0</b>	<b>4.8</b>	<b>401,280</b>	<b>93,632</b>

Source: [TransAfricaBorder](http://TransAfricaBorder), week ending 08/03/2026.

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

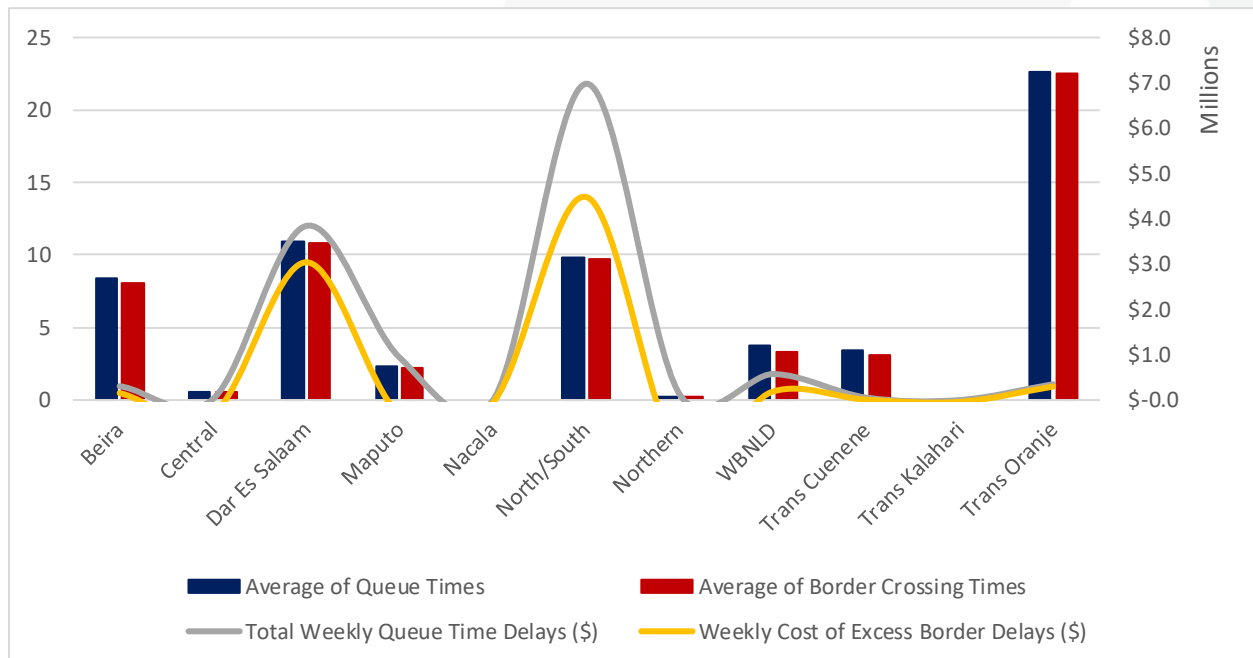
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: Calculated from [TransAfricaBorder](http://TransAfricaBorder), week ending 08/03/2026.

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: Calculated from [TransAfricaBorder](http://TransAfricaBorder), week ending 08/03/2026.

In summary, cross-border queue time averaged **~4,9 hours** (down **~1,7 hours** from the previous week's **~6,6 hours**), indirectly costing the transport industry an estimated **\$13,2 million (R223 million)**. Furthermore, the week's average cross-border transit times also hovered around **~4,8 hours** (down by **~1,8 hours** from the **~6,5 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$6,2 million (R106 million)**. The total indirect cost for the week amounts to an estimated **~\$19,4 million (R329 million)**, down by **↓48%** from the **~R631 million** in the previous report).

#### 4. International Update

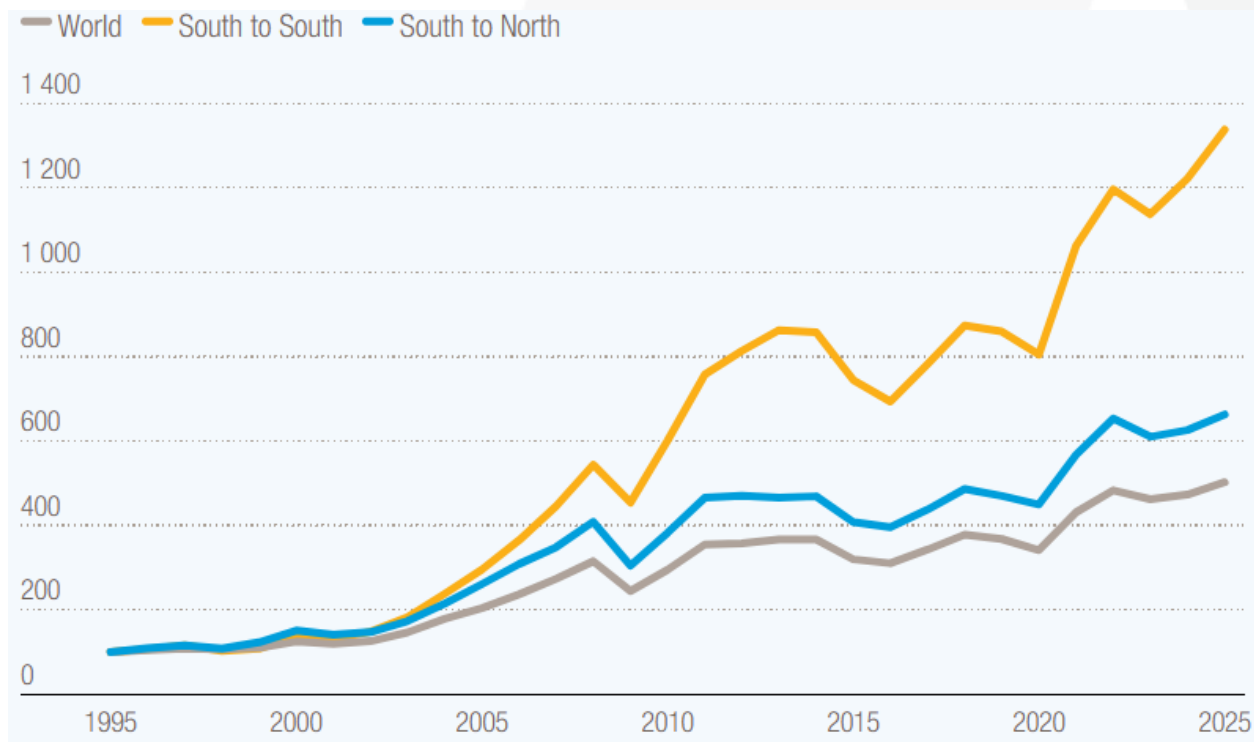
The following section provides some context around the global economy and its impact on trade, mainly an update on (a) global trade, (b) the global shipping industry, and (c) the global aviation industry.

##### a. Global trade

UNCTAD's *Global Trade Update (March 2026)* highlights a decelerating but structurally shifting global trade environment, where developing economies increasingly anchor growth. While overall trade momentum is moderating amid geopolitical fragmentation, policy uncertainty, and supply chain disruptions, South–South trade continues to expand as a stabilising force. This reflects a long-term reorientation of trade flows: developing countries now direct most exports to other developing markets, supported by Asia-centric value chains and growing Africa–Asia and Africa–Latin America linkages.

The report emphasises that South–South trade is no longer peripheral but central to global trade resilience, offsetting weaker demand from advanced economies and offering diversification opportunities. For Africa, this shift is material, with over half of exports now destined for developing markets, reinforcing the strategic importance of regional integration and interregional corridors. However, realising these gains requires reform of trade rules, improved connectivity, and reduced structural barriers to enable deeper participation in evolving Southern-led value chains.

Figure 15 – World, South to South, and South to North merchandise export flows (Index 1995 = 100)



Source: [UN Trade and Development](#)

**b. Global shipping industry**

**i. Iran conflict and the impact on global shipping**

Drewry’s recent assessment indicates that the Strait of Hormuz disruption has placed acute pressure on global container shipping, exposing the Gulf’s structural dependence on a single maritime chokepoint.<sup>11</sup> Approximately **33 million TEUs** – around **3,5% of global container trade** – move annually through Gulf terminals, emphasising the systemic importance of the corridor.

While alternative “bypass” ports across the GCC and wider region (e.g. Salalah, Duqm, and Red Sea gateways) collectively offer more than **20 million TEU of latent capacity**, Drewry finds this capacity largely theoretical rather than operationally equivalent. Geography is the principal constraint: many alternative ports require long overland transport legs (often exceeding 1,500 km), lack rail connectivity, and impose high cost and time penalties.

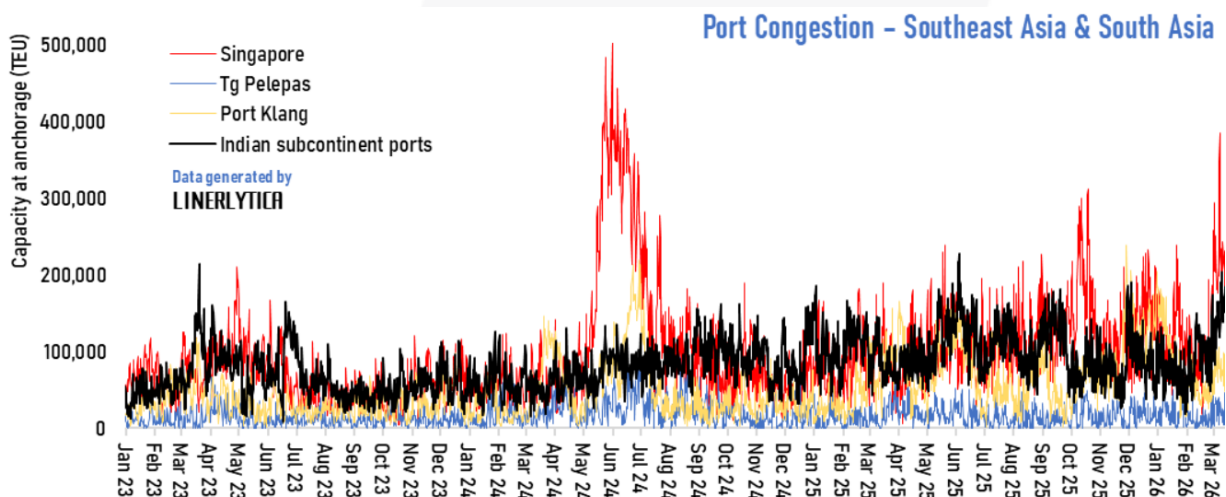
Critically, not all ports are substitutable. Khor Fakkan emerges as the only high-utility bypass due to proximity and connectivity, while others suffer from weak hinterland integration. As a result, there is effectively no scalable substitute for Hormuz; a closure would erode hub connectivity across the Gulf and fragment established liner networks.

The implication for global shipping is a forced reconfiguration toward longer routings, increased transshipment complexity, and higher inland logistics costs. Structurally, the crisis highlights decades of underinvestment in multimodal corridors and reinforces the fragility of hub-and-spoke systems concentrated around single chokepoints. However, the immediate effects have already subsided.

**ii. Hormuz's impact on regional port congestion is less severe than expected**

Port congestion at the key hub ports across South Asia and Southeast Asia has started to ease following the initial disruptions from the closure of the Strait of Hormuz:

Figure 16 – Port Congestion – South-East Asia & South Asia (capacity at anchorage)



Source: Calculated from [Linerlytica](https://www.linerlytica.com)

<sup>11</sup> Drewry. 13/03/2026. [Container Shipping via Strait of Hormuz under pressure: Can GCC bypass ports fill the gap?](https://www.drewry.com/news/2026/03/13/container-shipping-via-strait-of-hormuz-under-pressure-can-gcc-bypass-ports-fill-the-gap/)

Singapore bore the brunt of the initial shock, but congestion has started to clear after delays peaked at **3,5 days**, while the other main Southeast Asian hubs have been able to limit delays **to less than 1 day**. On the Indian subcontinent, displaced Middle East traffic is still building up, especially in Mundra and Colombo, but the impact has so far been kept under control with delays averaging less than 2 days, and traffic flow is expected to peak in the coming week. Attention is shifting towards bunker availability, with supply reported to be tightening across Asia, with China the only key region where availability has not been significantly affected.

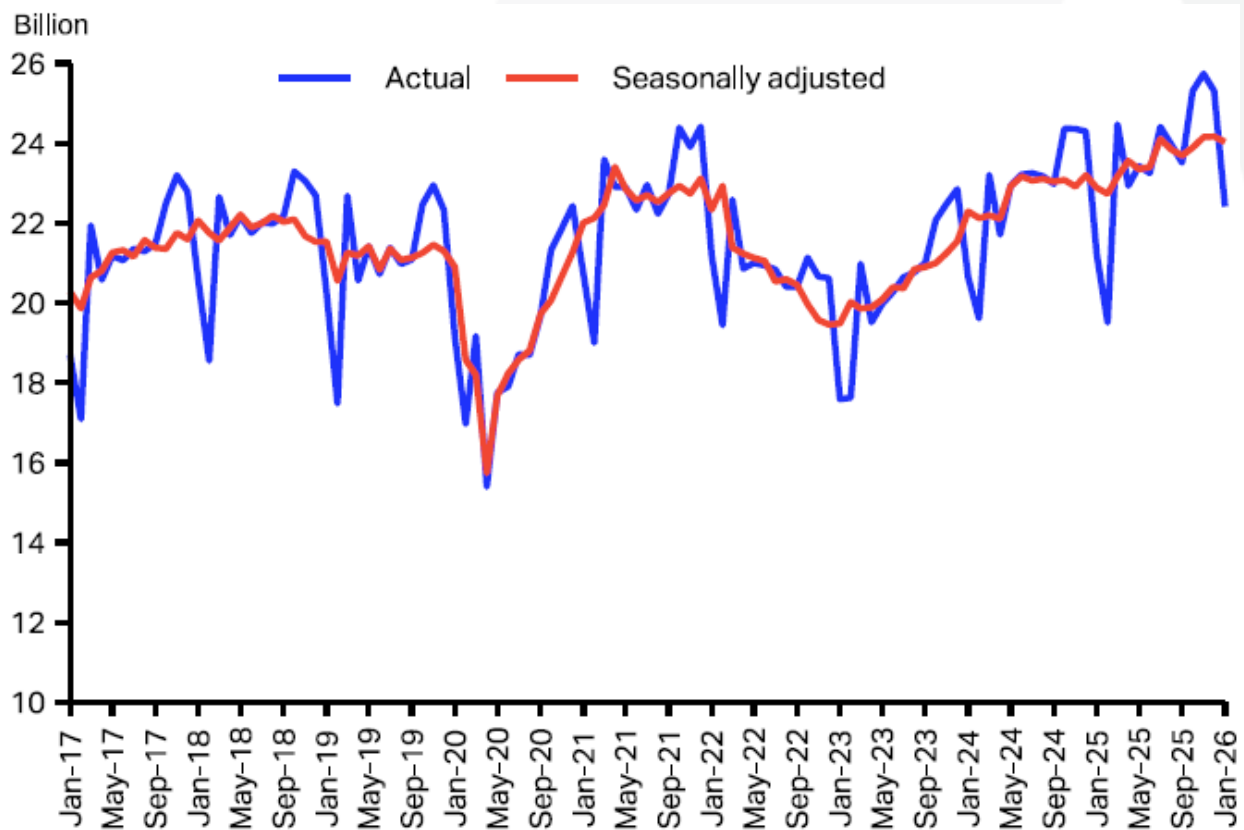
Additional evidence suggests that operational instability is already materialising along these corridors: carriers are increasingly discharging cargo opportunistically, shifting cost burdens onto forwarders, while extreme spot rate volatility reflects fragmented network reliability.

At the same time, emerging Gulf initiatives—such as UAE–Oman “green corridors”—indicate early-stage attempts to mitigate chokepoint risk, though these remain incremental relative to the scale of Hormuz-dependent flows.

### c. Global air cargo industry

According to the latest “Air Cargo Market Analysis” by IATA, global air cargo markets opened 2026 with continued demand growth, with CTKs increasing by **↑5,6%** year-on-year (**↑7,2%** for international), reflecting resilient trade flows despite policy uncertainty and uneven regional dynamics:

Figure 17 – Industry CTKs (Billions)



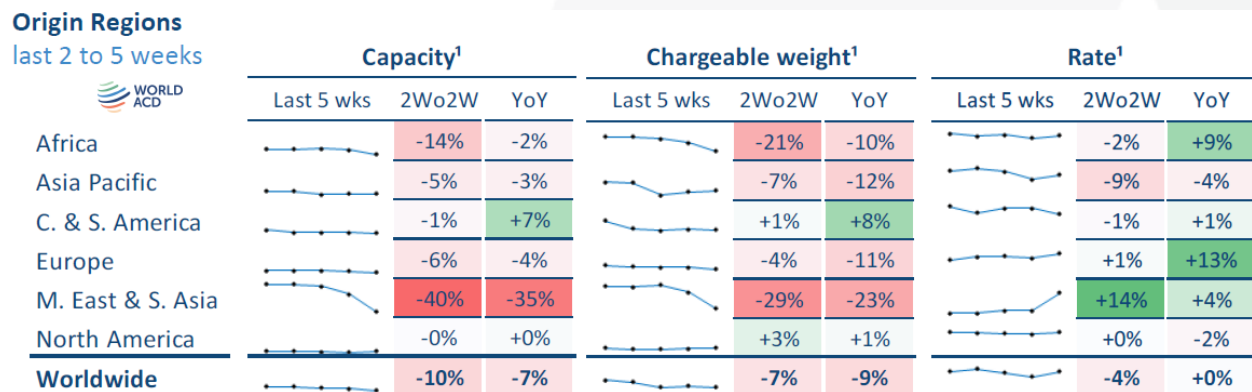
Source: [IATA](http://www.iata.org)

Capacity (ACTKs) rose more moderately by **↑3,6%** (y/y), reaching record January levels, indicating early signs of supply-side fatigue, particularly in Asia-Pacific. Load factors improved slightly (**↑0,9%** to **45,1%**), suggesting broadly balanced demand–capacity conditions, albeit with regional divergence.

Regionally, Africa remains the standout performer (**↑18,2%**), while Asia-Pacific (**↑7,8%**) and Europe (**↑6,9%**) continue to anchor global growth; the Middle East (**↑9,3%**) reflects hub strength, whereas the Americas remain weak. Structurally, air cargo continues to outperform broader trade, with CTKs up **~↑17%** since 2023, underpinned by e-commerce, trade reconfiguration, and AI-driven high-value flows. Being from January, these figures all pointed to a robust year ahead for air cargo; unfortunately, the current Iran conflict and subsequent pressures on Middle East airspace are set to scupper some growth by February.

According to the high-frequency data from WorldACD, global air cargo markets have weakened in the latest period, with chargeable weight declining by approximately **↓4%** week-on-week and **↓12%** year-on-year, reflecting widespread disruption linked to geopolitical tensions and capacity constraints. Rates have moved in the opposite direction, rising by around **↑6%** week-on-week to **\$2,40/kg** (and up year-on-year), driven by sharp capacity reductions – particularly in the Middle East, where volumes and capacity fell by more than **↓30%** week-on-week.

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



Source: [World ACD](#)

At a more aggregated level, recent multi-week trends show softening volumes globally (**~↓7%** year-on-year) alongside declining capacity, while pricing remains broadly supported, pointing to a tightening market driven more by supply shocks than demand strength.

ENDS <sup>12</sup>

<sup>12</sup>**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.*