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Cargo Movement Update #277[1]

Date: 12 April 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)	22,146	25,231	**47,377**	23,332	29,999	**53,331**	**↓11%**
Air Cargo (tons)	4,006	2,250	**6,256**	4,519	2,800	**7,319**	**↓15%**

Monthly Snapshot

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

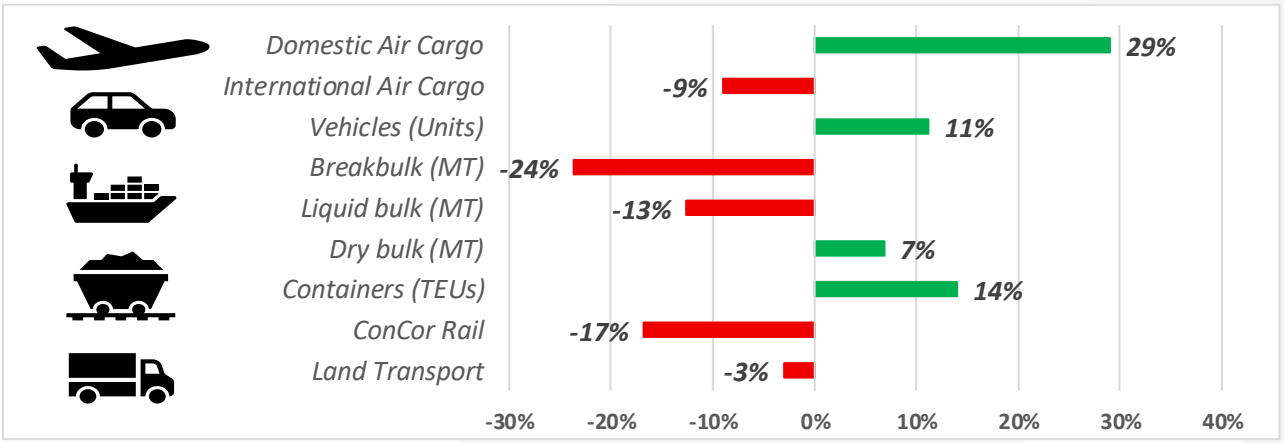
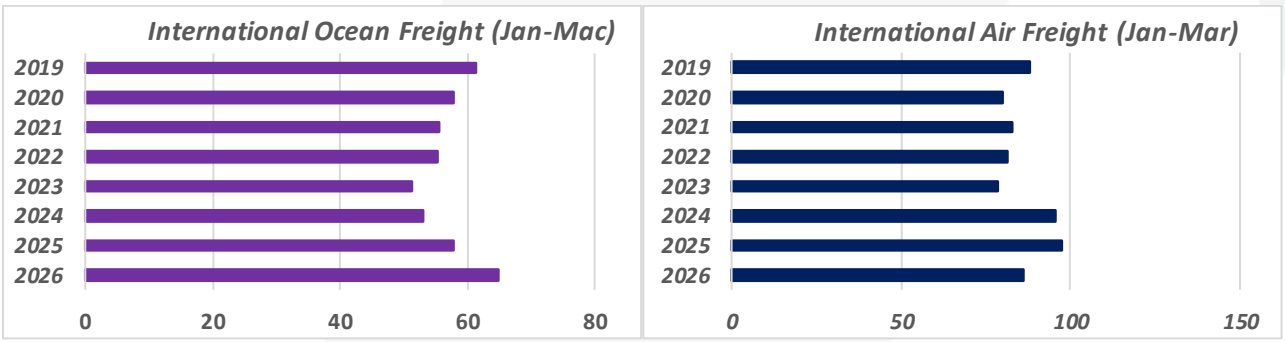


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **6,768**[6] **TEUs** were handled per day, with **7,714 TEUs** projected for next week.
- TNPA Mar: TEUs: **↑17%** (m/m) & **↑14%** (y/y). Bulk: **↑13%** & **↑7%**. Vehicles: **↑72%** & **↑11%** (y/y).
- Rail cargo handled out of Durban was reported at **2,138** containers, up by **↑81%** from last week.
- Cross-border queue: **no change**; transit: **↑0.7 hrs**; SA borders: **~10.3 hrs** (**↓7%**); SADC: **~6.7 hrs** (**↑16%**).
- Day 9/14 ceasefire sees Hormuz traffic slowly moving, with container growth to slow to **↑1.8%** in 2026.
- Global air cargo tonnages are down by **↓4%** (w/w), as rates have increased again (**↑4%**) to **$3.10/kg**.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *277th* 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: Mar vs. Mar.
[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 **6,768 TEUs** was handled daily, a decrease from **7,619 TEUs** the previous week.

Reduced volumes across the port system characterised port operations throughout the week, except for the Cape Town Container Terminal. CTCT reported no weather delays, adding to the improved performance. In Durban, Pier 1 showed reduced volumes, while the limited data from Durban Gateway Terminal hinted at a strong week. The Eastern Cape had lower than usual volumes, with reduced capacity for the coming weeks due to equipment outages (for maintenance).

Transnet Port Terminals has implemented a fuel neutrality charge of **R52 per container from 1 May 2026**, triggered by a sharp increase in coastal diesel prices to **R25.04/l**, with the charge structured as a threshold-based, monthly-adjusted cost recovery mechanism. While the framework aligns with input-cost pass-through principles, its step-based design and limited transparency on underlying cost exposure suggest **partial, rather than fully neutral, cost recovery**.

Global shipping markets remain constrained by the Strait of Hormuz disruption, with the system in day 9 of a two-week ceasefire, but risks are still elevated. Gulf-bound mainline capacity remains down at least **↓48%**, while backlog conditions have eased, with stranded fleet capacity declining from **1.4% to 1.0%** inside the Gulf and to just **↓0.2%** outside. Transit flows have resumed but remain below pre-conflict norms, with voyage extensions of **10–14 days** reducing effective capacity. Fuel prices (mid-$90/bbl) continue to drive elevated BAFs and rate volatility, although below COVID-era extremes. The Middle East accounts for <5% of global throughput, limiting systemic risk, but second-order effects persist. *Drewry* forecasts global container growth slowing to **↑1.8%** in 2026, with downside risk to **0.5–1.3%**.

For shippers, the implication is to standardise bunker cost management, actively monitor alternative routings, and avoid planning assumptions based on near-term normalisation. Contracting strategies should leverage structural overcapacity, while supply chains must build flexibility to accommodate longer transit times and ongoing geopolitical volatility.

This week's international cargo flows significantly subsided – especially with exports. The daily average amounted to **~572,000 kg** inbound (**↓11%**, w/w) and **~321,000 kg** outbound (**↓20%**). Current volumes to and from ORTIA are nonetheless still above the commensurate volumes of April last year (**↑6%**) – but below the pre-pandemic April of 2019 (**↓8%**).

Monthly, international air cargo volumes were mixed across South Africa's major gateways in March 2026 – Johannesburg (**↑60%**, m/m; **↑7%**, y/y) rebounded strongly, while Cape Town (**↓14%**, m/m; **↓52%**, y/y) and Durban (**↓67%**, m/m; **↓72%**, y/y) recorded sharp contractions – resulting in total international air cargo throughput declining by **↓9%** year-on-year compared with March 2025.

Domestic air cargo volumes were generally resilient in March 2026 – Johannesburg (**↑4%**, m/m; **↑64%**, y/y) and Durban (**↑5%**, m/m; **↑3%**, y/y) posted gains, while Cape Town (**↓4%**, m/m; **↓3%**, y/y) softened marginally – resulting in total domestic air cargo throughput increasing by **↑2%** month-on-month and **↑29%** year-on-year.

Global air cargo markets continue to feel the effects of the conflict, as air cargo volumes declined **↓4%** week-on-week, reflecting seasonal weakness and broad regional slowdowns, while rates rose **↑4%** to **$3.10/kg** (**↑21%**, y/y) amid capacity constraints and disruption-linked surcharges. A fragile Middle East

ceasefire offers limited relief, with constrained capacity likely to sustain elevated pricing despite softer demand.

On the N4 corridor, movements increased for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **1 train per day**) also increased for the week. Truck volumes through the border post increased to around **1,522 HGVs per day** (**↑5%**, w/w). Overall, queue times decreased to an average of **~3.6 hours** (**↓14%**) at the border. The average processing times also decreased to an average of **~3.4 hours** (**↓17%**) per crossing. It appears that the visit from Minister Creecy last week has had a positive effect on HGV volume and processing times.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts increased by a significant **↑14%** (m/m). Northbound traffic (Eastbound for Lebombo) increased across the board, notably at **Lebombo** (**↑19%**), **Kopfontein** (**↑16%**) and **Ramatlhabama** (**↑15%**). Southbound traffic (Westbound for Lebombo) also increased across the board, notably at **Kopfontein** (**↑32%**), Skilpadshek (**↑32%**), and **Ramatlhabama** (**↑22%**). Overall, the most significant increases were at Lebombo (**↑18%**), Kopfontein (**↑17%**), and **Ramatlhabama** (**↑17%**). Beitbridge was mostly stable (**↑1%**).

Weekly land border crossing figures in the SADC region show that the average queue time was mostly stable from last week, as transit time increased by approximately **three-quarters of an hour**. The median border crossing times at South African borders decreased by about **three-quarters of an hour** on average, averaging **~10.3 hrs** (**↓7%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) increased by **nearly an hour**, averaging **~6.7 hrs** (**↑16%**). This week, on average, the same two SADC borders took more than a day to cross, namely Chirundu OSBP and Kasumbalesa (the worst affected, taking around **five days** to cross from the **Zambian side**).

Cross-border developments this week include **(1)** severe congestion across the Groblersbrug–Kazungula corridor driven by passenger prioritisation and downstream warehousing closures, **(2)** the emergence of fraudulent weighbridge enforcement scams targeting transporters in Zambia, and **(3)** irregular and duplicative levy collections in Mazabuka, creating additional cost and compliance uncertainty.

In summary, TNPA's March port statistics reinforce a broadly positive logistics trajectory, with container throughput rising to **452,125 TEUs** (**↑17%**, m/m; **↑14%**, y/y), bulk volumes reaching **21.7 million tonnes** (**↑13%**, m/m; **↑2%**, y/y), and vehicle units surging to **93,128** (**↑72%**, m/m; **↑11%**, y/y). This momentum is mirrored in Durban's container performance, where early indications suggest gains following recent structural reforms (DGT/Pier 2 is up by **↑6.6%**, y/y for Q1). Notwithstanding heightened geopolitical risk in the Gulf and upward pressure on oil prices, the system continues to demonstrate resilience, underpinned by incremental operational improvements and sustained demand. However, the durability of these gains will depend on deepened collaboration across stakeholders – particularly the institutionalisation of transparent data-sharing frameworks – to support integrated planning, credible performance measurement, and evidence-based reform.

Contents

1. Ports Update

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

a. Container flow overview

Because of the unavailability of Transnet figures last week, the following table reconciles the containers handled for the week of 30 March to 5 April:

Table 2 – Container Ports – Weekly flow Projected for 30 March to 5 April (measured in TEUs)

7-day flow projected (30/03/2026 – 12/04/2026)			
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)	1,874	13,121	↓10%
Cape Town Container Terminal	2,521	17,648	↑17%
Ngqura Container Terminal	2,248	15,738	↓2%
Port Elizabeth Container Terminal	286	1,999	↓33%
Other	689	4,825	↑18%
Total	**7,619**	**53,331**	↑1%

Source: Calculated from TPT, 2026. Updated 12/04/2026.

The following tables indicate the container flows reported for the last seven days:

Table 3 – Container Ports – Weekly flow reported for 6 to 12 April (measured in TEUs)

7-day flow reported (06/04/2026 – 12/04/2026)			
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)	1,823	12,764	↓3%
Cape Town Container Terminal	2,615	18,307	↑4%
Ngqura Container Terminal	1,826	12,779	↓19%
Port Elizabeth Container Terminal	227	1,589	↓21%
Other	277	1,938	↓60%
Total	**6,768**	**47,377**	↓11%

Source: Calculated from TPT, 2026. Updated 12/04/2026.

An average of **~6,768 TEUs** (↓11%) was handled per day for the last week (*6 to 12 April, Table 2*). Consequently, throughput was above the projected average of **~6,641 TEUs** (↑2% actual versus projected). For the coming week, an increased average of **~7,714 TEUs** (↑14%) is predicted to be handled (*13 to 19 April, Table 4*).

Table 4 – Container Ports – Weekly flow projected for 13 to 19 April (measured in TEUs)

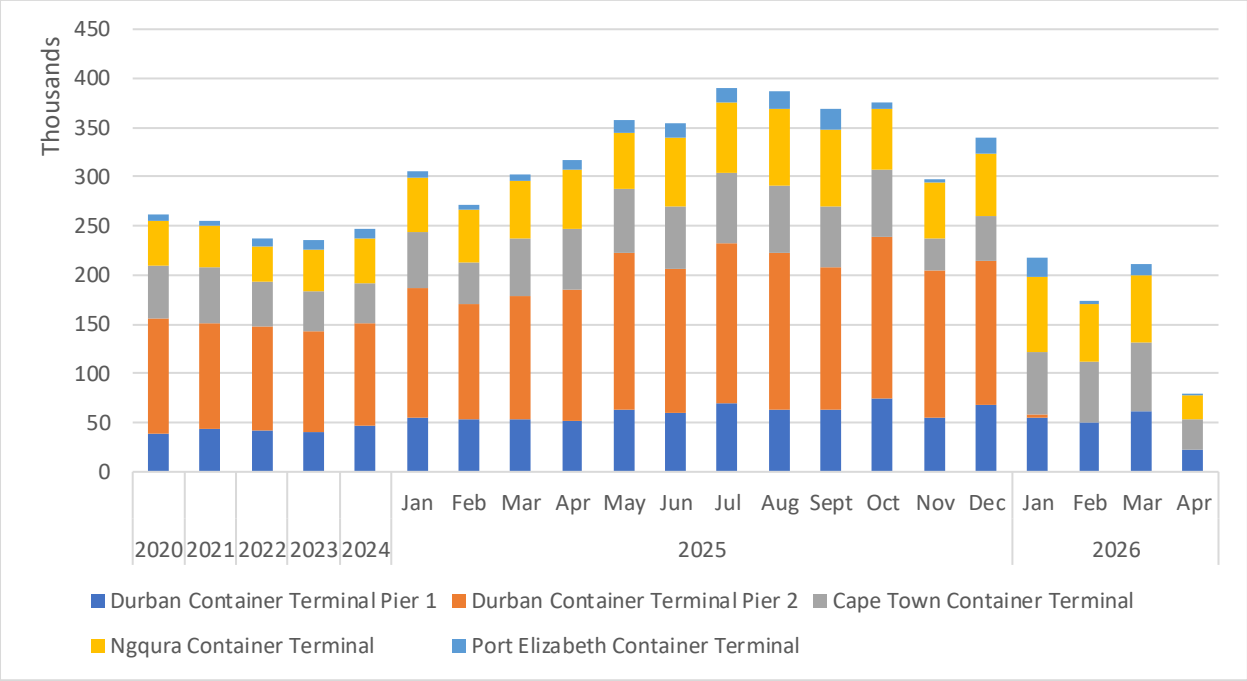
7-day flow projected (13/04/2026 – 19/04/2026)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Gateway Terminal (Pier 2)	Since the transition from DCT to DGT, no information has been received.		
New Pier (Pier 1)	1,889	13,226	↑4%
Cape Town Container Terminal	2,121	14,845	↓19%

Ngqura Container Terminal	2,404	16,828	↑32%
Port Elizabeth Container Terminal	380	2,661	↑67%
Other	920	6,439	↑232%
Total	**7,714**	**53,999**	↑14%

Source: Calculated from TPT, 2026. Updated 12/04/2026.

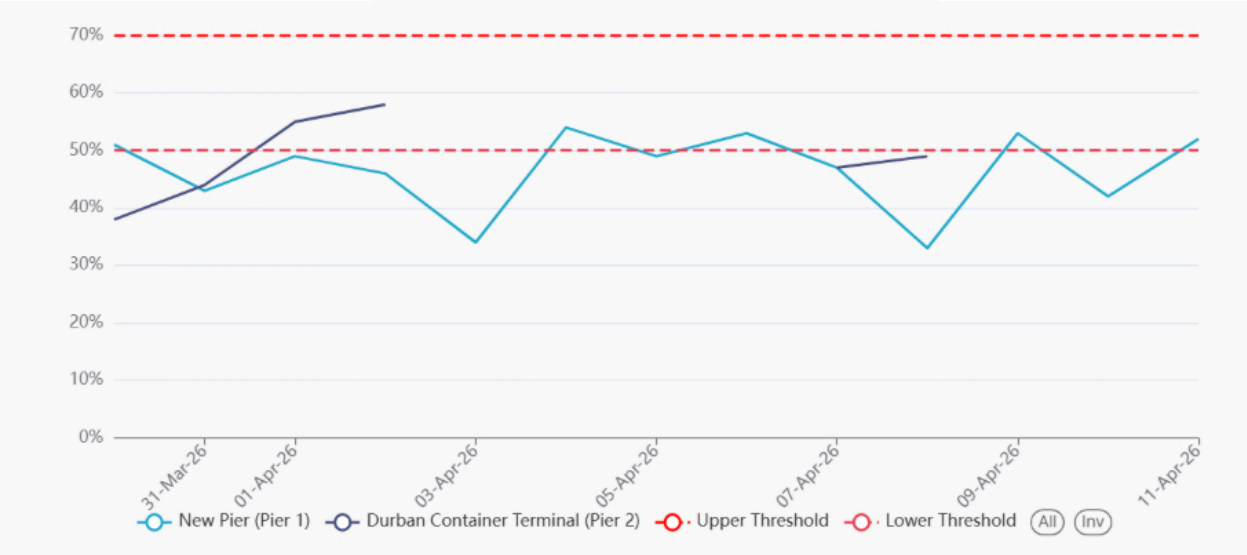
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2026, and updated 12/04/2026.

Figure 4 – Stack occupancy in Durban, general-purpose containers (28 March to present; day on the day)



Source: Calculated using data from Transnet, 2026, and updated 12/04/2026.

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 (28 March to present, day on day)

Source: Calculated using data from Transnet, 2026, and updated 12/04/2026.

b. TNPA: March update

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

- Container throughput totalled **452,125 TEUs**, which is up by **↑17%** (m/m) and **↑14%** (y/y).
- Total bulk cargo totalled **21,7 million tonnes**, which is up by **↑13%** (m/m) and **↑2%** (y/y).
- Vehicle throughput totalled **93,128 units**, which is up by **↑72%** (m/m) and **↑11%** (y/y).

The narrative around these figures centres around a substantial increase across the board, both monthly and yearly. The following table shows the respective changes versus February:

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

	Feb	Mar	Movement	% change
Containers (TEUs)	**387,107**	**452,125**	**65,018**	**17%**
Landed	191,028	224,497	33,469	18%
Shipped	196,079	227,628	31,549	16%
Dry bulk (MT)	15,907,525	17,693,260	1,785,735	11%
Liquid bulk (MT)	2,691,316	3,464,794	773,478	29%
Breakbulk (MT)	667,862	526,729	-141,133	-21%
Vehicles (Units)	54,012	93,128	39,116	72%
Total cargo (excl. Vehicles)	**19,266,703**	**21,684,783**	**2,418,080**	**13%**

Source: Calculated from TNPA, updated 15/04/2026.

Transnet Port Terminals handled an impressive **452 thousand containers** and **21.7 million metric tonnes** of **bulk** cargo during March. Vehicles were the most significant mover, followed by containers and liquid bulk.

[7] Transnet. 2025. Port statistics.

Only the breakbulk throughput was less than in February. These developments are, of course, aligned with the global uptake after the Chinese New Year lull. Nevertheless, the throughput levels have exceeded typical South African seasonality, which is quite encouraging:

Table 6 – TNPA – Cyclical volume and growth: March 2020, 2025, and 2026

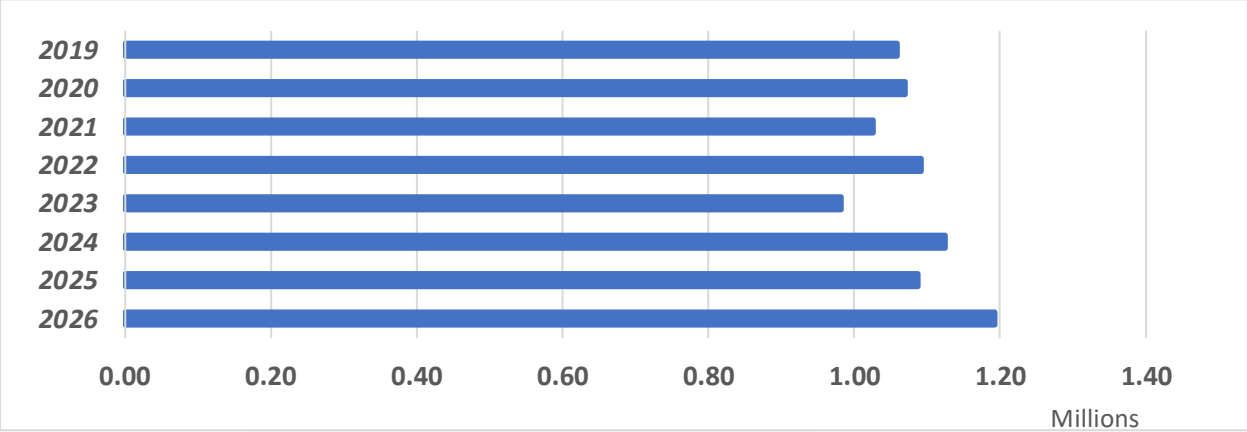
	2020	2025	2026	% 20 –'26	% '25-'26
Containers (TEUs)	**326,619**	**396,653**	**452,125**	**38%**	**14%**
Landed	157,284	189,133	224,497	43%	19%
Shipped	169,335	207,520	227,628	34%	10%
Dry bulk (MT)	14,974,933	16,557,886	17,693,260	18%	7%
Liquid bulk (MT)	3,430,771	3,965,453	3,464,794	1%	-13%
Breakbulk (MT)	248,820	690,153	526,729	112%	-24%
Vehicles (Units)	60,352	83,772	93,128	54%	11%
Total cargo (excl. Vehicles)	**18,654,524**	**21,213,493**	**21,684,783**	**16%**	**2%**

Source: Calculated from TNPA, updated 15/04/2026.

Compared to yearly trends, gains are evident across several sub-sectors, with containers (**↑14%**), vehicles (**↑11%**) and dry bulk (**↑7%**) leading the way. The two sub-sectors showing contractions are with breakbulk (**↓24%**), which is unsurprising and liquid bulk (**↓13%**), which is exactly as expected given the global situation in Iran.

Spotlighting the container industry, we can start to assess the impact of ICTSI's operational takeover of the Durban Container Terminal Pier 2, or 'Durban Gateway Terminal'. After the first quarter of 2026, overall container throughput at Durban is up by **↑6.2%**, with throughput at DGT up by slightly more, at **↑6.6%**.[8] This reflects a broadly improved operational environment across the port system, with incremental gains in vessel productivity, berth fluidity, and landside coordination. Credit is due to both Transnet and private sector participation at DGT for sustaining volumes and stabilising performance during a period of structural transition, as illustrated in a similar vein to *Figure 1*:

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



Source: Calculated from TNPA, updated 15/04/2026.

However, the current data discontinuity materially constrains system-wide visibility and evidence-based decision-making. In a network where volumes are the primary performance anchor, the absence of terminal-

[8] Throughput estimates are derived indirectly from TNPA cargo dues data, using applicable tariff structures and container categorisation to infer handled volumes. The methodology yields an estimated margin of error of approximately ±4%. A detailed explanation of the approach can be provided upon request; however, direct access to disaggregated terminal data would materially enhance accuracy, transparency, and analytical value.

level throughput data introduces analytical blind spots, weakens benchmarking integrity, and limits the ability to calibrate interventions across the logistics chain. If public–private partnerships are to deliver their full efficiency dividend, they must be underpinned by transparent, standardised, and timely data-sharing protocols across all operators.

The recent restructuring of the container network remains directionally correct and should continue. However, its success will depend not only on capital deployment and operational reforms, but equally on institutional alignment—particularly the establishment of enforceable data-sharing frameworks that serve the collective interests of port users, regulators, and the broader economy.

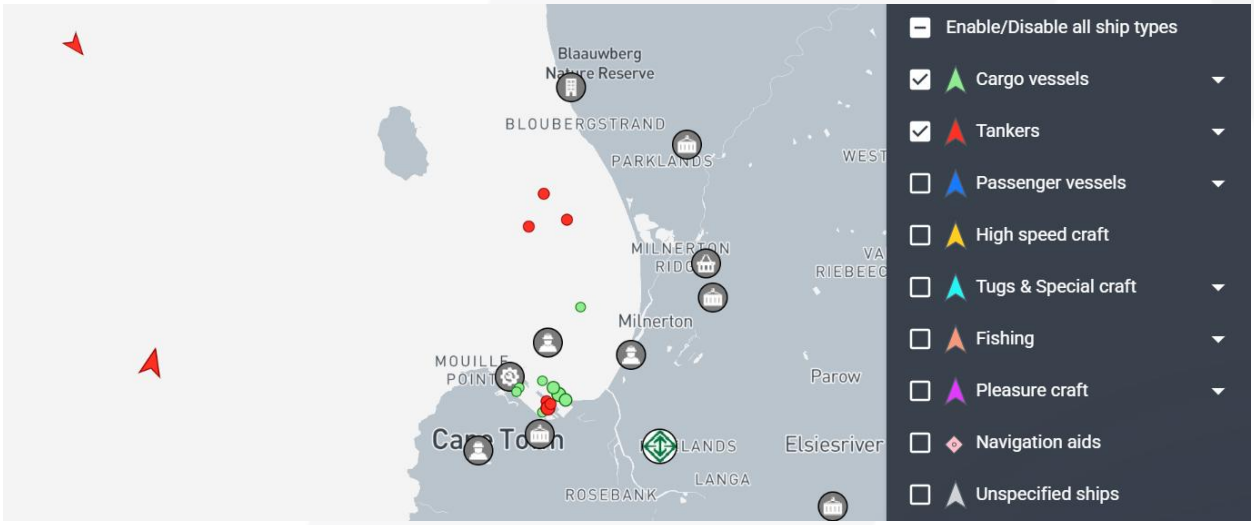
c. Summary of port operations

i. Cape Town

The Cape Town Container Terminal showed an increase in volumes this week, with the relief of no weather delays reported. An average of eight out of 9 cranes and 27 out of 32 RTGs were available throughout the week. An average of three vessels were reported at berth (spending around 41 hours at berth), and two at anchorage (at an average of 30 hours spent at anchorage), with a total of 10 vessel calls through the week, further adding to the increased volumes.

The Cape Town Multi-Purpose Terminal showed a significant decline in volumes, with just one vessel calling during the week, berthing on arrival, and spending one day at port. The terminal reported two out of three cranes available throughout the week.

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



Source: Marine Traffic. Updated 12/04/2026 at 14:00.

ii. Durban

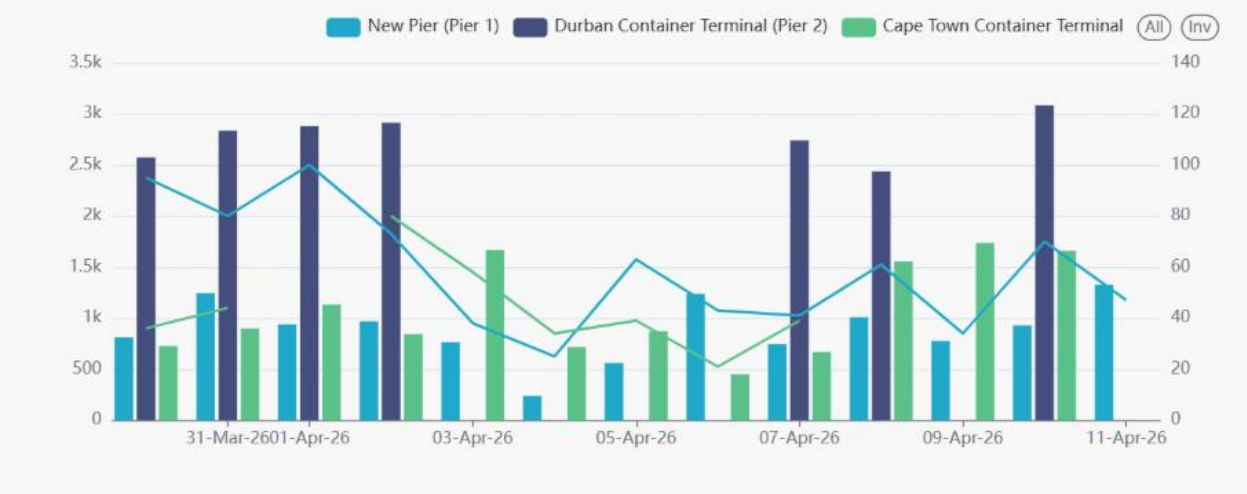
Pier 1's waterside volumes are slightly down from the previous week, paired with lower rail volumes. The terminal had around four vessel calls through the week, with an average of one vessel at anchorage (waiting around 35 hours), and two vessels at berth (working for around 48 hours). Throughout the week, the terminal had an average of five out of seven cranes and 13 out of 25 RTGs available. The **TTT** for the week averaged **~49 minutes** (**↓28%**, w/w), and the average **staging time** was **~29 minutes** (**↓48%**).

Durban Gateway Terminal reported an average of 11 out of 15 cranes available throughout the week. There was an average of four vessels at berth (working for an average of 83 hours), and one vessel at anchorage (waiting around 10 hours). The terminal is estimated to have moved around 3,500 containers per day.

The Durban Multi-Purpose Terminal experienced a significant reduction in volumes, with just one vessel calling at the terminal, spending less than one day at berth.

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

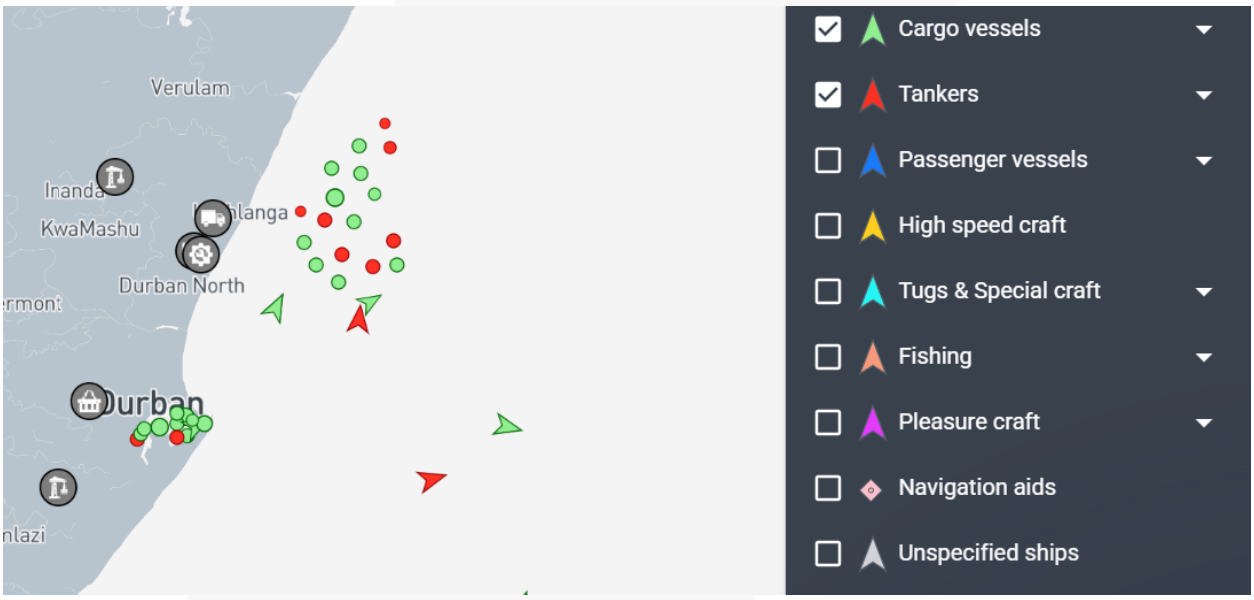
Figure 8 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 12/04/2026.

The queue of container vessels waiting outside Durban **was stable** this week. On Wednesday afternoon (15 April), **two** container vessels were waiting outside at anchorage for Durban, **both** for DGT. The queue of dry (**five**), liquid (**seven**), and breakbulk (**two**) increased slightly from last week:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 12/04/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal had a slower week, with an average of only two vessels at berth (working around 38 hours at anchorage), and an average of one vessel at anchorage (waiting for an average of 10 hours). The terminal reported an average of six out of eight cranes and 25 out of 30 RTGs throughout the week. Berth D100 will be out of operation for testing and crane repairs (a joint effort between TPT and TNPA); the estimated date of return is towards the end of April.

Port Elizabeth Container Terminal reported lower volumes than the previous week, though the terminal had four vessel calls. Vessels spent an average of 21 hours at anchorage and 22 hours at berth. The terminal reported an average of two out of three cranes and 9 out of 11 straddle carriers available throughout the week. The third crane (the second STS crane) remains out for repairs, with no additional feedback received in the past week; the estimated date of return remains mid-May.

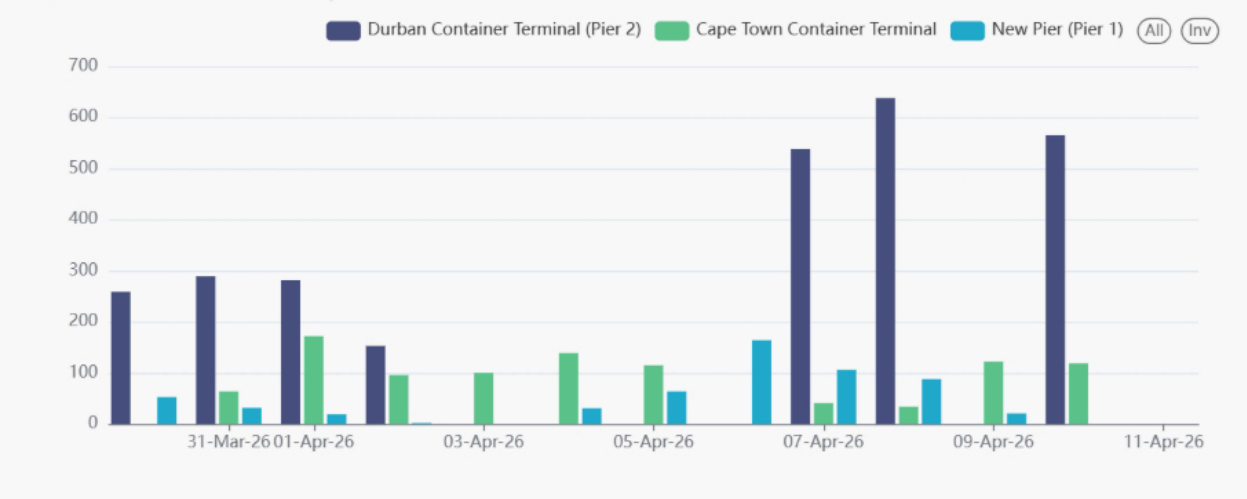
iv. Richards Bay

The daily average coal throughput for the week **decreased substantially** and averaged around **135,000 tons** (**↓37%**, w/w) a day. An average of **20 trains** was serviced on the landside (**down** from last week's **24**), and **slightly below** the target (of **22** trains).

v. Transnet Freight Rail (TFR)

In the last week (*6 to 12 April*), rail cargo on the ConCor line out of Durban was reported at **2,138** containers, up by **↑81%** from the previous week's **1,184** containers.

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



Source: Calculated using data from Transnet, 2025. Updated 12/04/2026.

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 (*6 to 12 April*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *April 2025* averaged **~839,596 kg**.

Table 7 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**572,335**	**4,006,345**	**↓11%**
Volume outbound	**321,410**	**2,249,870**	**↓20%**
Total	**893,745**	**6,256,215**	**↓15%**

Courtesy of ACOC. Updated: 12/04/2026.

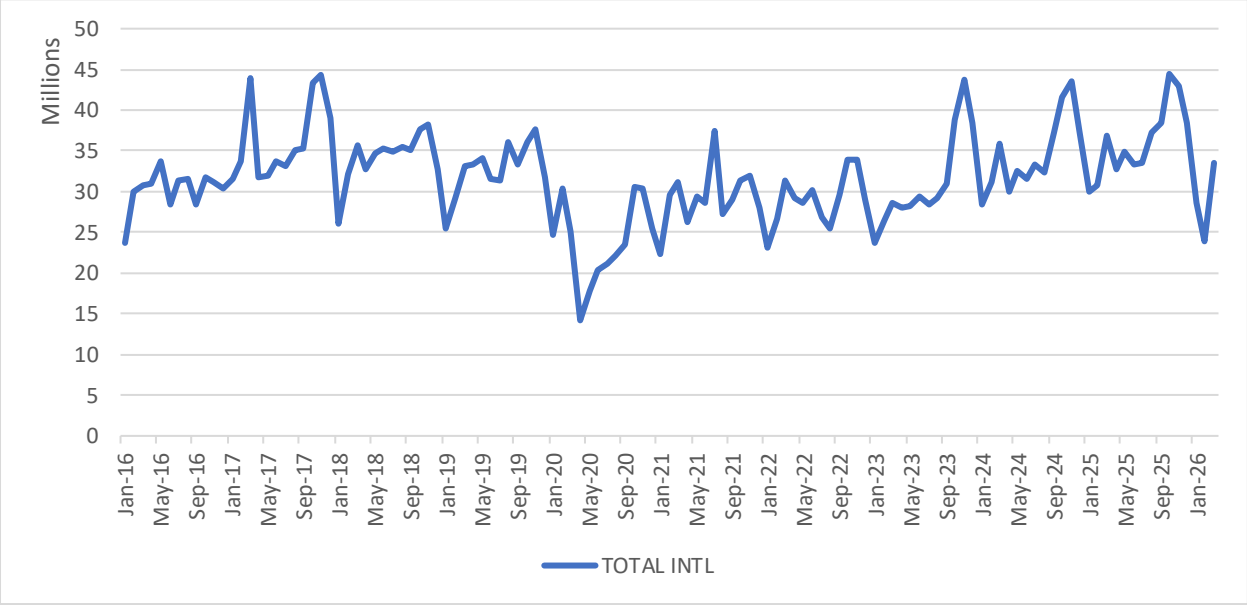
This week's international cargo flows significantly subsided – especially with exports. The daily average amounted to **~572,000 kg** inbound (**↓11%**, w/w) and **~321,000 kg** outbound (**↓20%**). Current volumes to and from ORTIA are nonetheless still above the commensurate volumes of April last year (**↑6%**) – but below the pre-pandemic April of 2019 (**↓8%**).

For the full month of March, a noticeable increase in international volumes handled at ORTIA is evident, despite the turmoil in the Gulf and the overall global reductions in air freight:

- Johannesburg increased by a significant **↑60%** (m/m) versus February and is up by **↑7%** (y/y) versus 2025.
- Cape Town, on the other hand, decreased by **↓14%** (m/m) and by a substantial **↓52%** (y/y) versus 2025.
- Durban also decreased by a mammoth **↓67%** (m/m) and **↓72%** (y/y) versus 2025.
- Consequently, total international air cargo for March 2026 was down by **↓9%** (y/y) versus 2025.

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

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



Calculated from ACOC. Updated: 12/04/2026.

b. Domestic air cargo

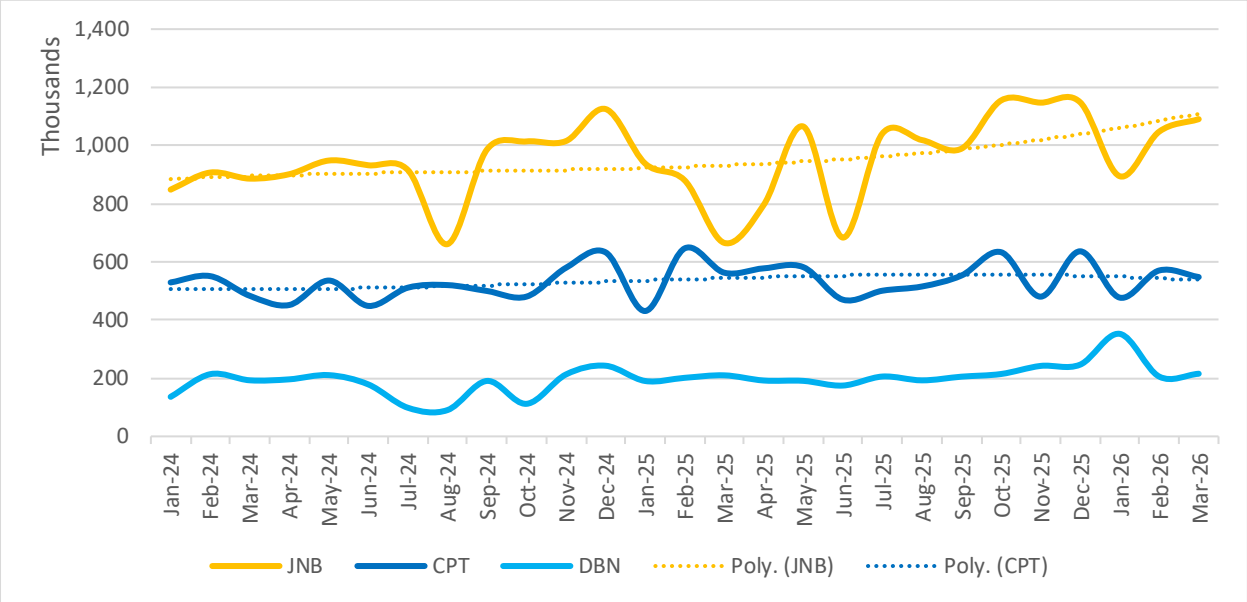
For the whole month of March, unlike international volumes, domestic volumes handled at our three main terminals were mostly stable versus February, with annual volumes up, driven by strong growth at ORTIA:

- Johannesburg increased by **↑4%** (m/m) versus February and is up by **↑64%** (y/y) versus 2025.

- Cape Town decreased by **↓4%** (m/m) and is down by **↓3%** (y/y) versus 2025.
- Durban increased by **↑5%** (m/m) and by **↑3%** (y/y) versus 2025.
- Consequently, total monthly domestic air cargo for March was up by **↑2%** month-on-month and **↑29%** year-on-year.

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

Figure 12 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 15/04/2026.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*6 to 12 April*), movements increased for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **1 train per day**) also increased for the week.

- Truck volumes through the border post increased to around **1,522 HGVs per day** (**↑5%**, w/w).
- Overall, queue times decreased to an average of **~3.6 hours** (**↓14%**) at the border.
- The average processing times also decreased to an average of **~3.4 hours** (**↓17%**) per crossing.

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

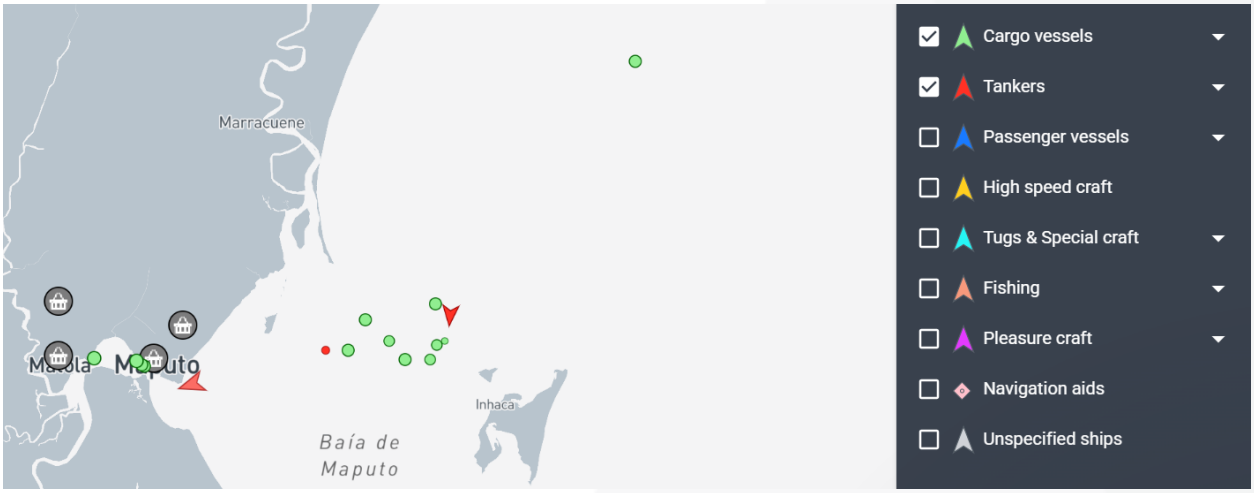
Table 8 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4
Average	1,522	1,406	1,124	192	56	197	54	233
% (w/w)	**5%**	**1%**	**2%**	**5%**	**1%**	**69%**	**31%**	**4%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 12/04/2026.

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

Figure 13 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 13/04/2026 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 March:

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

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	15,825	**10%**	6,660	**-14%**	22,485	**1%**
Groblersbrug	7,144	**8%**	5,567	**8%**	12,711	**8%**
Kopfontein	6,496	**16%**	751	**32%**	7,247	**17%**
Lebombo	45,733	**19%**	43,865	**18%**	89,598	**18%**
Ramatlhabama	5,832	**15%**	2,320	**22%**	8,152	**17%**
Skilpadshek	8,741	**8%**	2,055	**32%**	10,796	**12%**

Source: TransAfricaBorder, 14/04/2026.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts increased by a significant **↑14%** (m/m). Northbound traffic (Eastbound for Lebombo) increased across the board, notably at **Lebombo** (**↑19%**), **Kopfontein** (**↑16%**) and **Ramatlhabama** (**↑15%**). Southbound traffic (Westbound for Lebombo) also increased across the board, notably at **Kopfontein** (**↑32%**), Skilpadshek (**↑32%**), and **Ramatlhabama** (**↑22%**). Overall, the most significant increases were at Lebombo (**↑18%**), Kopfontein (**↑17%**), and **Ramatlhabama** (**↑17%**). Beitbridge was mostly stable (**↑1%**).

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

- Overall, the average queue time was mostly stable from last week, as transit time increased by approximately **three-quarters of an hour**.
- The median border crossing times at South African borders decreased by about **three-quarters of an hour** on average, averaging **~10.3 hrs** (**↓7%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by **nearly an hour**, averaging **~6.7 hrs** (**↑16%**).

1. **Groblersbrug–Kazungula corridor disruption (Southbound/Northbound):**

a. Southbound queues at Groblersbrug were triggered by downstream warehousing closures in Johannesburg, constraining cargo offloading capacity.
b. Simultaneously, prioritisation of passenger traffic at Groblersbrug and Tlokweng Border Post reduced commercial processing to minimal levels, with trucks held for up to five days.

2. **Queue spillover and corridor imbalance:**
   a. The suppression of commercial flows upstream led to a surge in northbound arrivals at Kazungula Border Post, where queues exceeded 3 km.
   b. Once normal commercial operations resumed, accumulated backlogs resulted in severe congestion and extended clearance delays.
3. **Fraudulent enforcement activity in Zambia:**
   a. Transporters reported a coordinated scam involving the impersonation of the Road Development Agency (RDA), alleging weighbridge evasion fines.
   b. The RDA has confirmed it does not issue fines telephonically, indicating systematic data harvesting and attempted financial extortion.
4. **Irregular and duplicative levy collection (Mazabuka):**
   a. Local officials in Mazabuka have been collecting "council levies" from drivers despite prior payment in Choma.
   b. This represents regulatory inconsistency and potential unlawful duplication, with conflicting guidance from authorities regarding the legitimacy of such charges.

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

Table 10 – 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	578	18.9	4.5	18.6	17,340	4,046
Beitbridge	Zimbabwe-SA	457	3.9	1.2	3.5	13,710	3,199
Groblersbrug	SA-Botswana	220	21.9	3.1	21.5	6,600	1,540
Martin's Drift	Botswana-SA	166	5.3	1.2	5.2	4,980	1,162
Kopfontein	SA-Botswana	193	10.8	2.2	10.5	5,790	1,351
Tlokweng	Botswana-SA	18	0.5	0.2	0.3	540	126
Vioolsdrift	SA-Namibia	30	4.3	2.2	4.2	900	210
Noordoewer	Namibia-SA	20	1.9	0.4	1.6	600	140
Nakop	SA-Namibia	30	4.0	1.1	3.6	900	210
Ariamsvlei	Namibia-SA	20	1.3	0.4	1.2	600	140
Skilpadshek	SA-Botswana	270	16.6	2.5	16.4	8,100	1,890
Pioneer Gate	Botswana-SA	44	0.0	0.0	0.0	1,320	308
Ramatlhabama	SA-Botswana	164	4.7	0.5	4.4	4,920	1,148
Ramatlhabama	Botswana-SA	55	0.6	0.2	0.4	1,650	385
Lebombo	SA-Mozambique	1,393	3.6	1.1	3.4	41,790	9,751
Ressano Garcia	Mozambique-SA	1,354	1.3	0.2	1.2	40,620	9,478

[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.

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
Sum/Average		**5,012**	**6**	**1**	**6**	**150,360**	**35,084**

Source: TransAfricaBorder, week ending 05/04/2026.

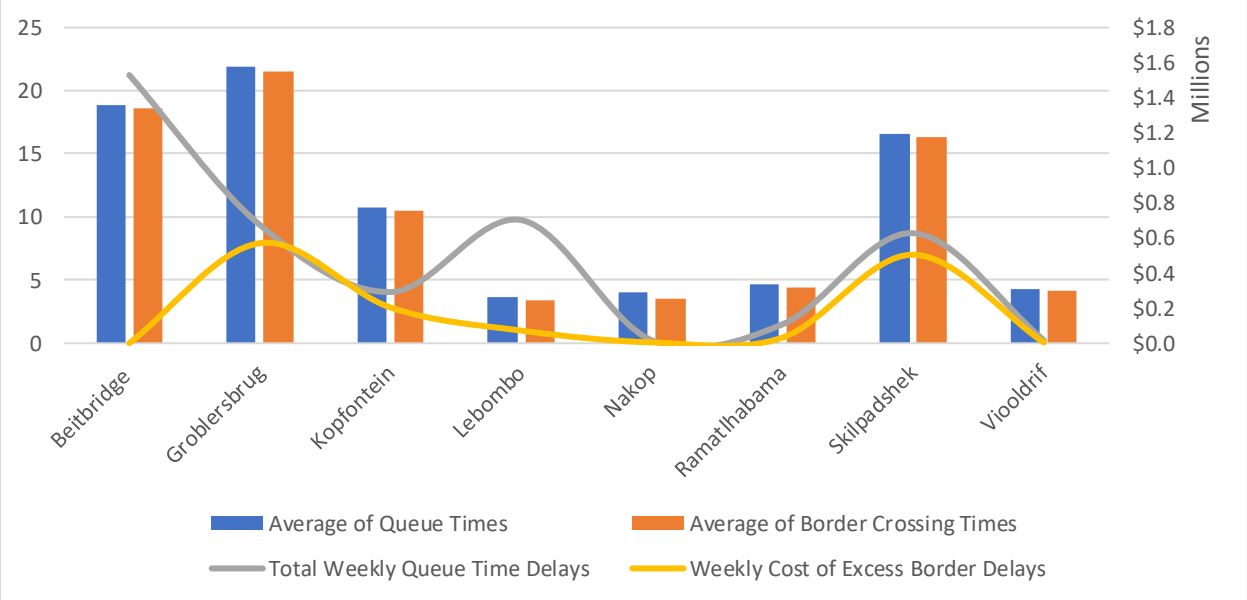
Table 11 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	7.2	2.0	6.9	9,600	2,240
Central Corridor	798	0.0	0.0	0.0	23,940	5,586
Dar Es Salaam Corridor	1,819	20.8	4.7	25.4	54,570	12,733
Maputo Corridor	2,747	2.5	0.7	2.3	82,410	19,229
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,566	14.2	2.8	15.8	106,980	24,962
Northern Corridor	2,817	0.4	0.1	0.3	92,520	21,588
WBNLD Corridor	774	4.9	0.9	4.7	23,220	5,418
Trans Cunene Corridor	100	2.9	1.0	2.6	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	10.4	3.7	10.2	3,480	812
Sum/Average	**13,284**	**6.4**	**1.4**	**7.1**	**406,530**	**94,857**

Source: TransAfricaBorder, week ending 05/04/2026.

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

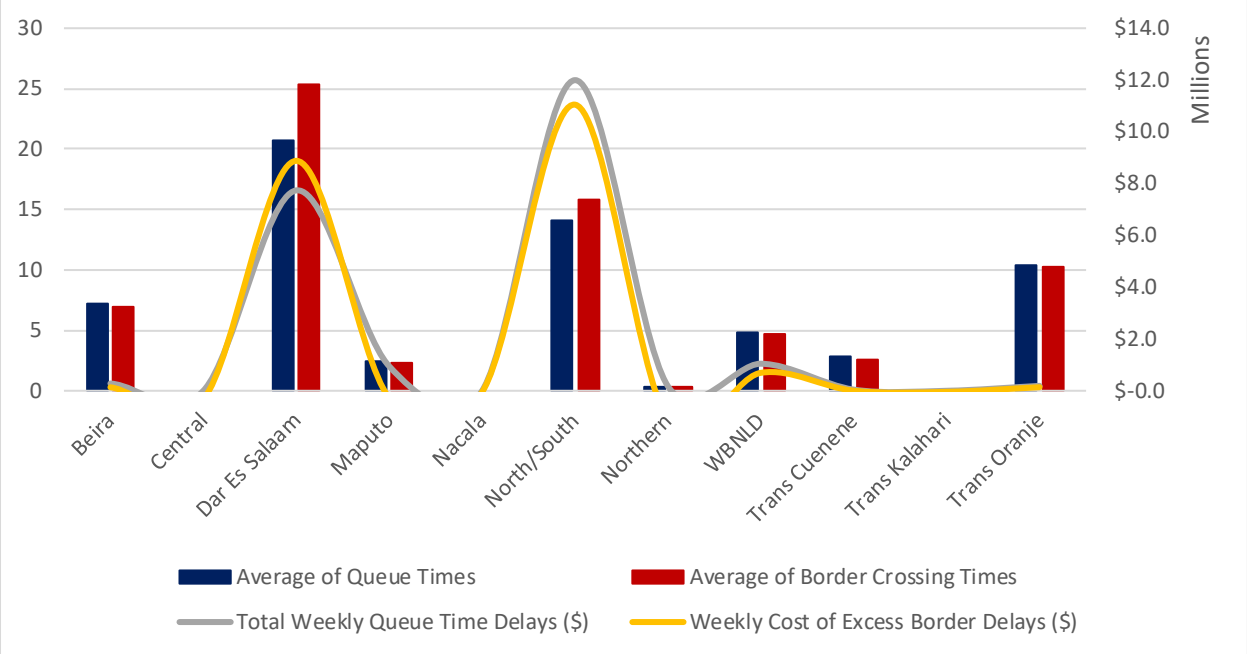
Figure 14 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder, week ending 05/04/2026.

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

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



Source: Calculated from TransAfricaBorder, week ending 05/04/2026.

In summary, cross-border queue time averaged **~6.4 hours** (**no change** from the previous week's **~6.4 hours**), indirectly costing the transport industry an estimated **$22.4 million** (**R377 million**). Furthermore, the week's average cross-border transit times hovered around **~7.1 hours** (up by **~0.7 hours** from the **~6.4 hours** recorded in the previous report), at an indirect cost to the transport industry of **$19 million** (**R320 million**). The total indirect cost for the week amounts to an estimated **~$41.5 million** (**R698 million**, up by **↑11%** from the **~R629 million** in the previous report).

4. International Update

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

a. Global shipping industry

i. Strait of Hormuz/Iran conflict

With the ongoing Iran conflict, the Strait of Hormuz continues to serve as the most critical geopolitical and logistical chokepoint, with conditions remaining highly fluid despite tentative de-escalation. At the time of writing, the market is in day 9 of a two-week ceasefire, although underlying risks remain elevated given fragile diplomatic signalling and continued military posturing.

Operationally, the container shipping response has followed a clear three-phase adjustment. Initial withdrawals from the Gulf were followed by partial reintegration via alternative network configurations, with carriers now actively preparing for renewed escalation scenarios. This is reflected in a sharp reduction in Gulf-bound capacity (down at least **↓48%** on mainline services), partially offset by limited redeployment to adjacent corridors such as the Red Sea.

Transit activity through the Strait has stabilised but remains significantly below pre-conflict norms. The *Drewry transit chart* illustrates both reduced vessel calls and constrained nominal capacity, confirming that

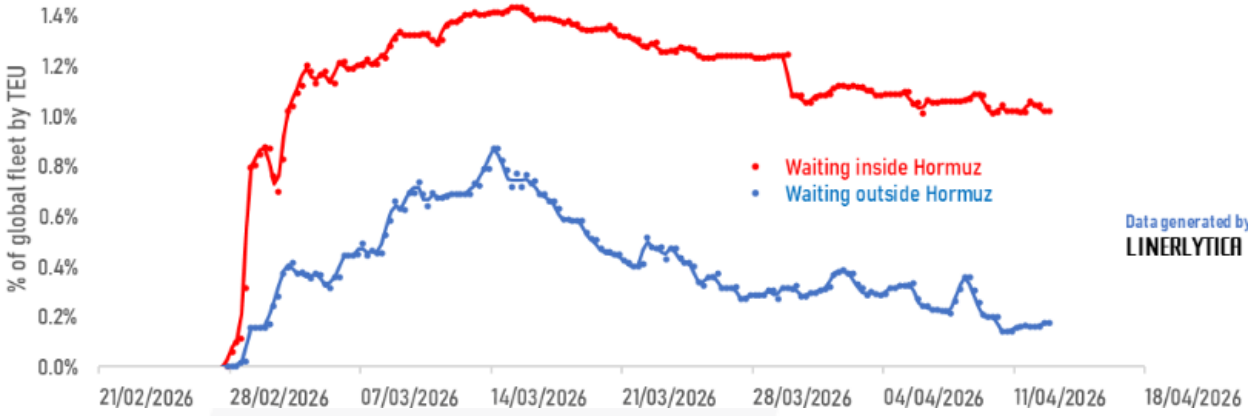
while flows have resumed, they are operating under heightened risk tolerance and insurance constraints rather than full commercial normalisation.

Figure 16 – Containership transits of the Strait of Hormuz (both directions) in 2026

Source: Drewry

Linerlytica this week reported that the departure of some of the stranded ships, as well as the partial resumption of intra-Gulf feeder services have reduced the total capacity of containerships waiting inside the Persian Gulf from a peak of **1.4% of the global fleet to 1.0% currently**, while ships waiting outside of Hormuz have also declined to only **↓0.2%** as carriers have cleared most of the vessel backlog and redeployed ships away from the Middle East:

Figure 17 – Containership affected by the Strait of Hormuz blockade



Source: Linerlytica

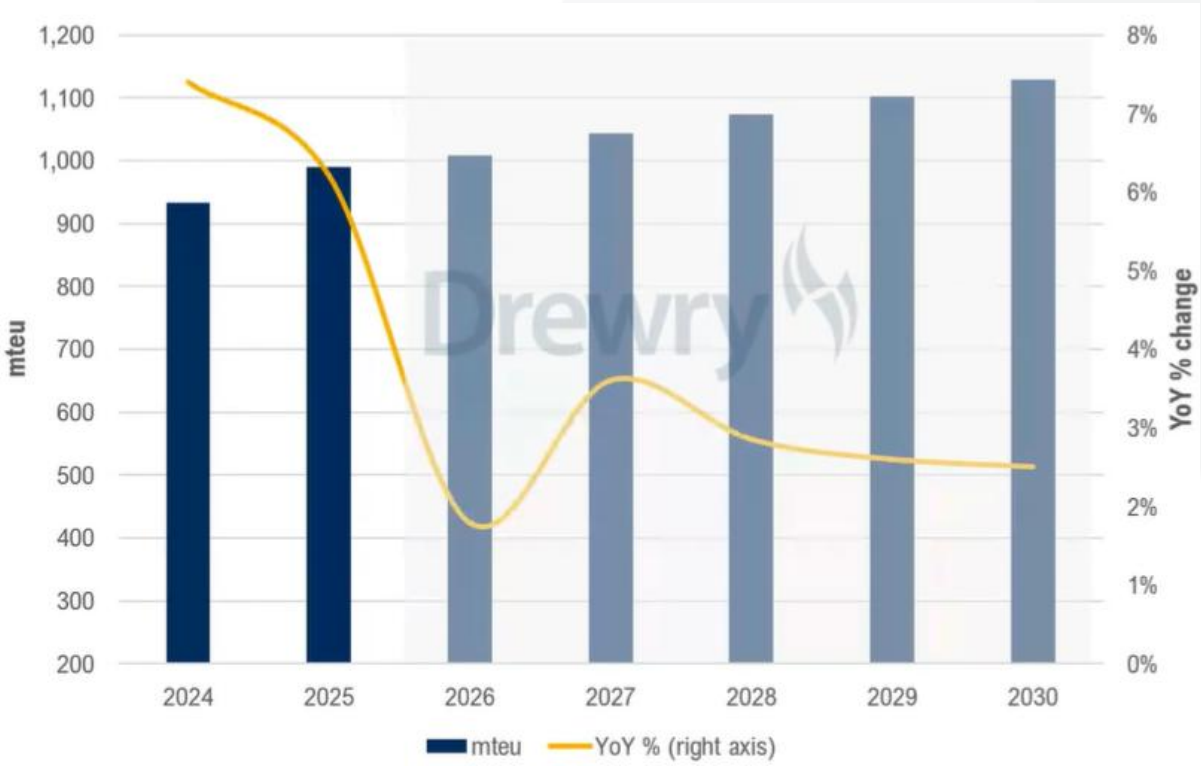
From a cost perspective, the disruption has been transmitted primarily through energy markets and bunker pricing (oscillating in the **mid-$90** across the last few days). Elevated fuel costs have driven widespread

bunker adjustment factors (BAFs) and emergency fuel surcharges (EFS), contributing to freight rate volatility (although significantly less compared to the COVID-19 shock). Spot rates into the Gulf spiked materially during the disruption phase and, while easing, remain structurally above pre-conflict levels.

Importantly, the global container system has proven relatively resilient. The Middle East accounts for **less than 5% of global container port throughput**, limiting systemic contagion. However, second-order effects – longer routings (**10** to **14 days**), port substitution, congestion at alternative hubs, and slower vessel speeds – are extending voyage cycles and reducing effective capacity.

Looking ahead, *Drewry's* base case anticipates a slowdown in global container throughput growth to approximately **↑1.8%** in 2026, with downside risk toward **~0.5–1.3%** under prolonged disruption scenarios (*see the 2030F throughput forecast visual*).

Figure 18 – Global container shipping demand outlook (2018-2030F, TEU Millions)



Source: Drewry

The key transmission channel remains energy: with significant oil supply disruptions already evident, further price escalation would likely suppress global demand and amplify logistics costs across all modes.

Drewry makes several suggestions to shippers to alleviate some of the current risk:

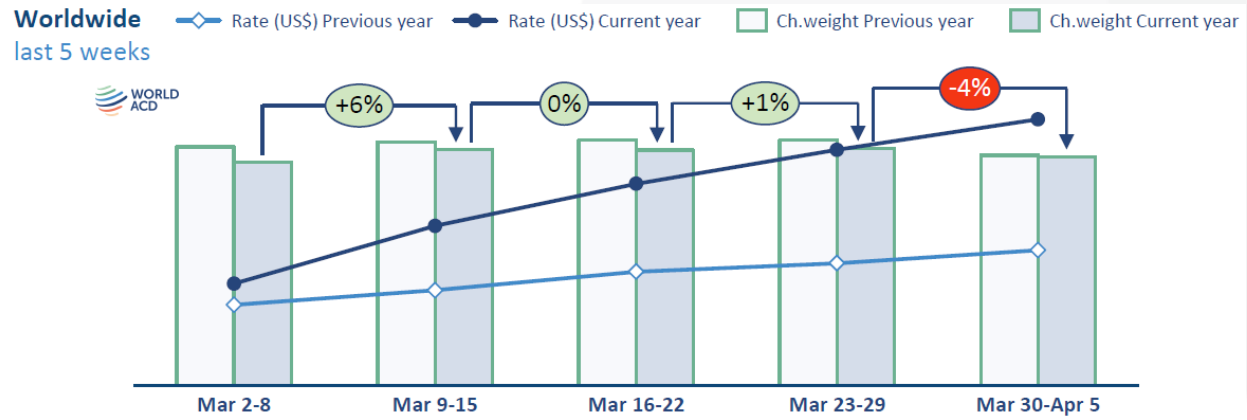
1. **Standardise bunker cost management:** Implement a consistent bunker adjustment framework across carriers and actively ensure that any easing in fuel prices is transmitted through reduced BAFs.
2. **Do not assume near-term normalisation:** Plan for sustained disruption, with structurally higher fuel costs, longer transit times, and continued geopolitical volatility embedded in network design and procurement strategies.
3. **Continuously evaluate routing optionality:** Actively monitor and compare primary and alternative trade lanes, including cost, transit time, and risk, as conditions evolve.

4. **Adjust sourcing and contracting strategies:** Leverage underlying structural overcapacity in global shipping to secure competitive contract rates, while isolating Middle East-linked trades from standard procurement cycles.
5. **Build flexibility into supply chains:** Avoid reliance on short lead times and optimise planning assumptions to account for extended voyage cycles, port substitution, and potential network reconfiguration.

b. Global air cargo industry

The high-frequency WorldACD data, global air cargo markets softened in volume terms during week 14 (30 March–5 April), with worldwide tonnage declining **↓4%** week-on-week, largely reflecting seasonal (notably the Easter Weekend) effects and broad-based contractions across major origin regions. Despite this, pricing dynamics remained firm: global rates increased **↑4%** week-on-week to approximately **$3.10/kg** and are **↑21%** higher year-on-year, underpinned by capacity constraints and sustained disruption-linked surcharges.

Figure 19 – Chargeable weight and rates (past two to five weeks)



Source: World ACD

Regionally, APAC exports weakened modestly, while Middle East & South Asia (MESA) stood out with **↑10%** weekly tonnage growth, albeit from a significantly depressed base due to conflict-related capacity losses. March marked a structural inflexion, with global volumes declining **↓4%** (y/y, from **↑7-8%** growth earlier in the year), while rates rose **↑12%** (y/y), driven by elevated fuel and war risk costs. Looking ahead, a fragile ceasefire offers limited near-term relief, with constrained belly hold capacity and elevated costs expected to sustain rate strength despite subdued demand.

ENDS [12]

[12]**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.*