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Cargo Movement Update #286[1]

Date: 14 June 2026

Weekly Snapshot

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

Flows	Current[2]			Previous[3]			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	28,632	32,620	**61,252**	27,096	30,869	**57,965**	↑6%
Air Cargo (tons)	4,458	2,513	**6,971**	3,827	2,592	**6,419**	↑9%

Monthly Snapshot

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

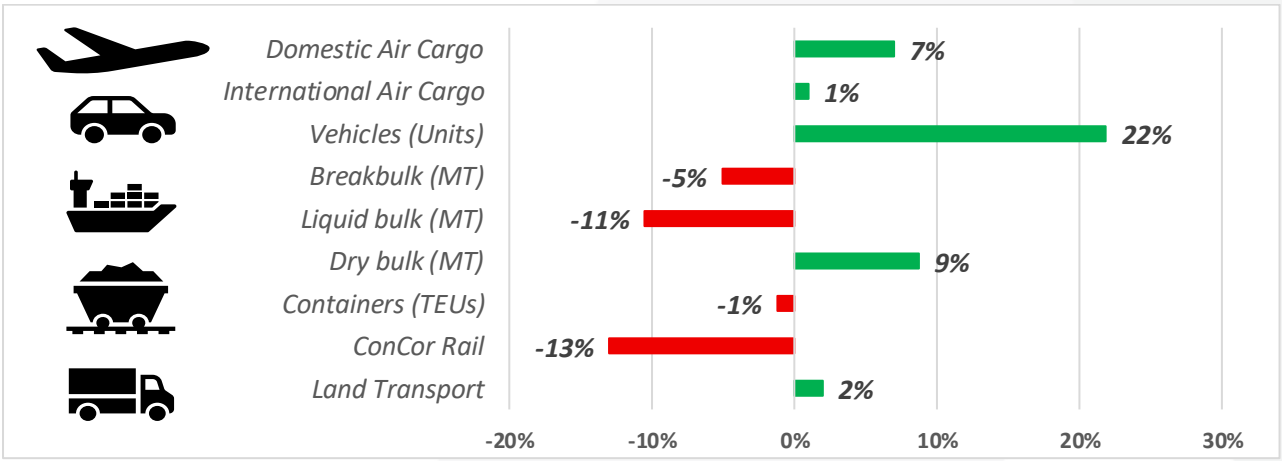
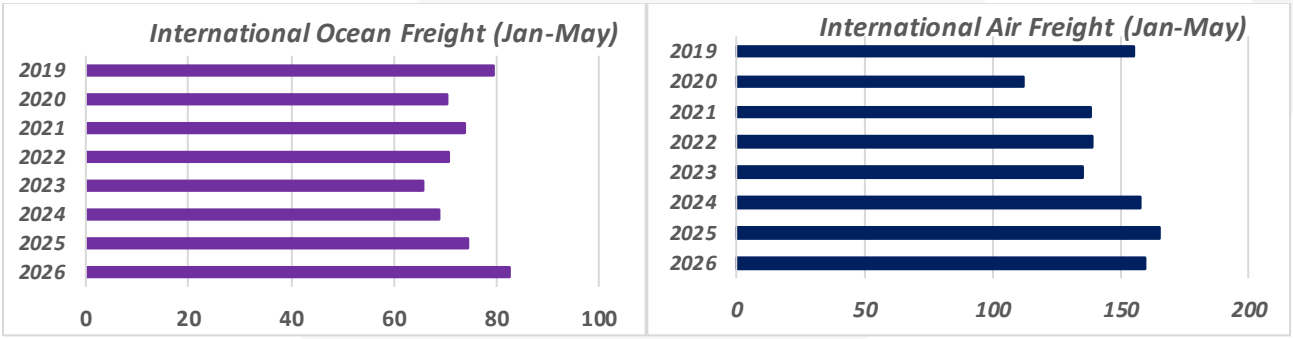


Figure 2 – Year-to-date flows 2019-2026[5]: ocean, (y/y) (million metric tonnes) & air freight, (y/y) (kg millions)



Key Notes

- An average of **8,750 TEUs** was handled per day, with **7,809 TEUs** projected for next week.
- TNPA May: TEUs: **↑12%** (m/m) & **↓1%** (y/y). Bulk: **↓1%** & **↑0.1%.** Vehicles: **↓14%** & **↑2%** (y/y).
- Rail cargo handled out of Durban was reported at **3,161** containers, up by ↑4% from last week.
- Cross-border queue: **↓1.1 hrs**; transit: **↓0.9 hrs**; SA borders: **~8.2 hrs** (**↓16%**); SADC: **~7.1 hrs** (**↓11%**).
- Global growth is projected to slow from **↑2.9%** in 2025 to **↑2.5%** in 2026, the weakest since the pandemic.
- After a prolonged surge, global air cargo rates eased by **↓1%** (w/w) to **$3.24/kg** but remain **↑33%** (y/y).

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *286th* 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: May vs. May.
[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.

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 **8,750 TEUs** was handled daily, a decrease from **8,281 TEUs** the previous week.

Port operations were mixed this week, despite a decrease in waterside volumes at all terminals except the Eastern Cape terminals; overall, waterside volumes were up. Strong waterside volumes in the Eastern Cape were supported by consistent equipment availability, as the terminals recovered from poor weather conditions the previous week. The Western Cape's decline in volumes was in part due to poor weather conditions the previous week. Overall, equipment availability remained strong across all major container terminals, supporting operational resilience despite weather impacts and fluctuating vessel volumes.

Global economic and shipping conditions remained highly sensitive to geopolitical disruption this week. The World Bank's latest outlook points to a material weakening in global growth, with output expected to slow from **↑2.9%** in 2025 to **↑2.5%** in 2026, before recovering modestly to around **↑2.8%** over 2027–28. The downgrade reflects the **(1)** impact of the Middle East conflict, **(2)** higher energy, LNG and fertiliser prices, and **(3)** the assumed disruption to Strait of Hormuz shipping flows through July. Global trade growth is also expected to ease from **↑4.8%** in 2025 to **↑2.9%** in 2026, although AI-related trade continues to support selected high-technology manufacturing and services flows. South Africa's outlook remains subdued, with growth projected at **↑1.0%** in 2026, **↑1.5%** in 2027 and **↑1.7%** in 2028. In shipping, the reported reopening of Hormuz and the US-Iran peace agreement have reduced immediate supply-chain risk, but carriers are expected to restore Gulf services cautiously, while maintaining contingency routings, war-risk surcharges and selective bookings. Freight rates also surged, with Drewry's WCI rising **↑12%** to **$3 969/FEU**, an 18-month high.

This week's international cargo flows increased substantially for inbound cargoes, as outbound cargoes were mostly steady. The daily average amounted to **~639,000 kg** inbound (**↑16%**, w/w) and **~359,000 kg** outbound (**↓3%**). Current volumes to and from ORTIA remain above the commensurate volumes of June last year (**↑11%**) and also above the pre-pandemic June of 2019 (**↑10%**).

For the full month of May, international air cargo volumes showed a modest rebound following the earlier reduction linked to Gulf-related disruption and broader global weakness in air freight. Johannesburg recorded a **↑4%** (m/m) increase versus April and was **↑5%** higher (y/y) compared with May 2025. Cape Town moved in the opposite direction, declining by **↓10%** (m/m) and **↓11%** (y/y). Durban posted the strongest monthly recovery, increasing by **↑26%** (m/m), although volumes remained **↓17%** below May 2025 levels. Consequently, total international air cargo for May 2026 increased by **↑2%** (m/m) and was marginally above last year's level, rising by **↑1%** (y/y). Despite the rebound, the year-to-date cargoes remain down by **↓3.4%** (y/y), mainly because of the Gulf disruptions.

For May, domestic air cargo volumes handled across the three main terminals were generally positive, with total monthly domestic cargo increasing by **↑1%** (m/m) and **↑7%** (y/y). Johannesburg remained stable compared with April but was **↑8%** higher compared with May 2025, while Cape Town increased by **↑3%** (m/m) and **↑2%** (y/y). Durban also recorded monthly growth, rising by **↑2%** versus April, and posted the strongest annual increase at **↑13%** (y/y). Overall, the May data points to a steady domestic cargo environment, with modest monthly growth and a comparatively stronger year-on-year performance across all three terminals.

International air cargo activity recovered in early June after the prior week's holiday-related contraction, with WorldACD reporting a **↑3%** (w/w) rebound in global chargeable weight in week 23. The recovery was led by stronger outbound volumes from North America, up **↑16%**, and MESA, up **↑13%**. However, the two-week trend remained softer, with worldwide chargeable weight down **↓5%**, and Africa and MESA particularly weak at **↓12%** and **↓13%**, respectively. Capacity improved modestly by **↑1%** (w/w), led by MESA and Africa, although MESA capacity remains materially below pre-conflict levels. Global rates eased slightly by **↓1%** to **$3,24/kg**, but remain **↑33%** higher year-on-year.

On the N4 corridor, movements decreased by about **38 trucks**, as trains from KM4 to Maputo also slightly decreased (an average of **1 train per day**). Truck volumes through the border post decreased slightly to **1,445 HGVs per day** (**↓3%**, w/w). Overall, queue times increased to an average of **~4.7 hours** (**↑24%**) at the border. The average processing times also increased at an average of **~4.4 hours** (**↑26%**) per crossing.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts increased by **↓6.1%** (m/m). Northbound traffic (Eastbound for Lebombo) was mixed, with substantial increases at **Groblersbrug** (**↑12%**), **Beitbridge** (**↑9%**) and **Skilpadshek** (**↑8%**), and a substantial decrease at Ramatlabama (**↓10%**). Southbound traffic (Westbound for Lebombo) increased significantly at **Kopfontein** (**↑99%**), **Skilpadshek** (**↑26%**) and Beitbridge (**↑20%**).

Weekly land border crossing figures in the SADC region show that the average queue time decreased by slightly more than **an hour** from last week, as transit time went in the opposite direction and decreased by nearly **an hour**. The median border crossing times at South African borders decreased by **an hour and a half** on average, averaging **~8.2 hrs** (**↓16%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased by approximately **an hour**, averaging **~7.1 hrs** (**↓11%**). This week, on average, **two** SADC borders again took more than a day to cross, namely Chirundu OSBP and Kasumbalesa (the worst affected, taking around **four and a half days** to cross from the **Zambian side**).

Cross-border developments this week included **(1)** stricter Kazungula risk-management controls, with high-value consignments now required to move in sealable transport and pre-clearance/payment requirements reinforced for both northbound and southbound traffic, **(2)** operational disruptions from a northbound Kazungula queue exceeding 3 km, Lebombo lane constraints due to speed-hump repairs, and a truck rollover on the Masvingo–Harare road, and **(3)** renewed road-safety and enforcement concerns following reports of an overloaded taxi-and-trailer combination receiving preferential treatment at Lebombo.

Finally, a significant amount of public discourse this week was dominated again by the latest World Bank Container Port Performance Index (CPPI). However, it is again worth emphasising: the CPPI should be interpreted carefully. It is a useful vessel-time-in-port indicator, adjusted for call and vessel size, but it is not a complete measure of port-system performance. It does not fully capture cargo throughput, terminal cost, landside evacuation, hinterland connectivity, rail availability, container dwell, reliability, or cargo-owner outcomes. South Africa's ranking, therefore, matters, but the policy response should not be defensive; it should be operational. The priority is sustained collaboration between government, Transnet, cargo owners, shipping lines and logistics providers; continued improvement in berth, crane, truck and rail performance; and structural reform that brings capital, accountability and operating discipline into the system. Above all, reform requires timely, disaggregated and verifiable Transnet data, without which neither industry nor government can diagnose performance credibly.

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 period runs from Monday to Sunday:

Table 2 – Container Ports – Weekly flow reported for 8 to 14 June (measured in TEUs)

7-day flow reported (08/06/2026 – 14/06/2026)			
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)	2,187	15,308	↓2%
Cape Town Container Terminal	2,116	14,813	↓1%
Ngqura Container Terminal	2,773	19,408	↑35%
Port Elizabeth Container Terminal	758	5,307	↑29%
Other	917	6,416	↓28%
Total	**8,750**	**61,252**	↑6%

Source: Calculated from TPT, 2026. Updated 14/06/2026.

An average of **~8,750 TEUs** (↑6%) was handled per day for the last week (*8 to 14 June, **Error! Reference source not found.***). Consequently, throughput was above the projected average of **~7,809 TEUs** (↑12% actual versus projected). For the coming week, a decreased average of **~7,809 TEUs** (↓11%) is predicted to be handled (*15 to 21 June*, **Error! Reference source not found.**).

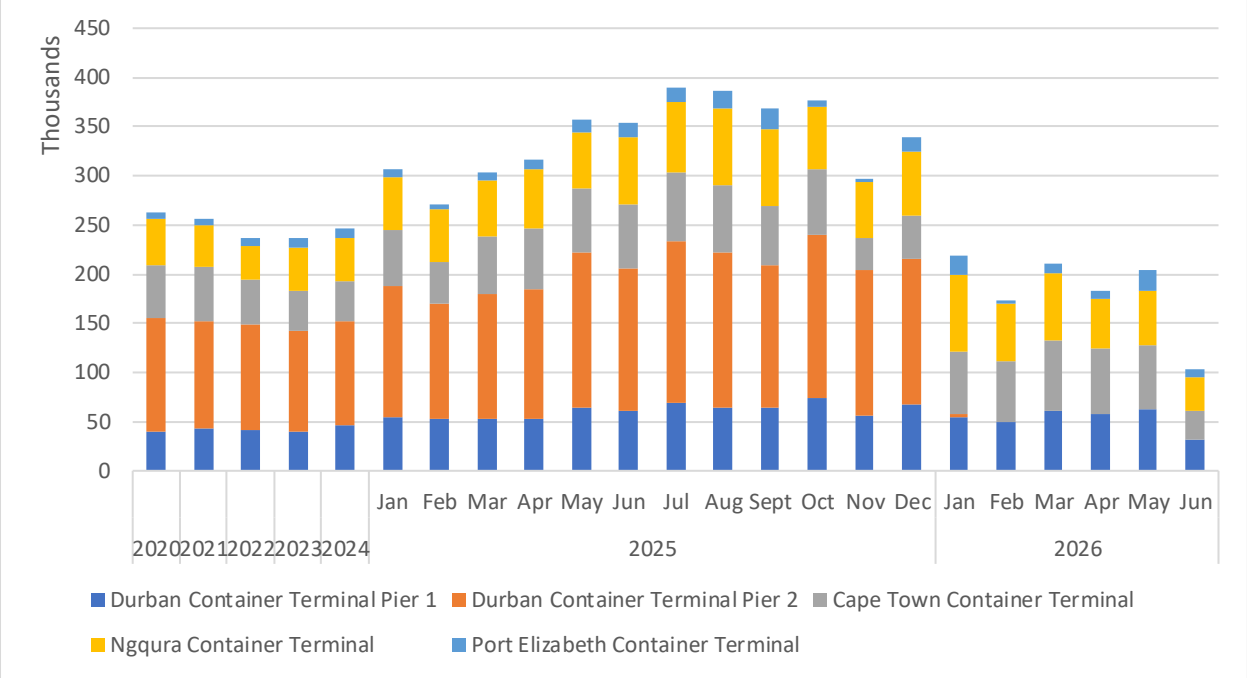
Table 3 – Container Ports – Weekly flow projected for 15 to 21 June (measured in TEUs)

7-day flow projected (15/06/2026 – 21/06/2026)			
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)	2,105	14,733	↓4%
Cape Town Container Terminal	2,289	16,025	↑8%
Ngqura Container Terminal	2,163	15,142	↓22%
Port Elizabeth Container Terminal	426	2,982	↓44%
Other	826	5,784	↓10%
Total	**7,809**	**54,666**	↓11%

Source: Calculated from TPT, 2026. Updated 14/06/2026.

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 14/06/2026.

The following table shows the average vessel time (in days) at anchorage and the average time at berth (in days) at our respective ports and terminals as of Wednesday:

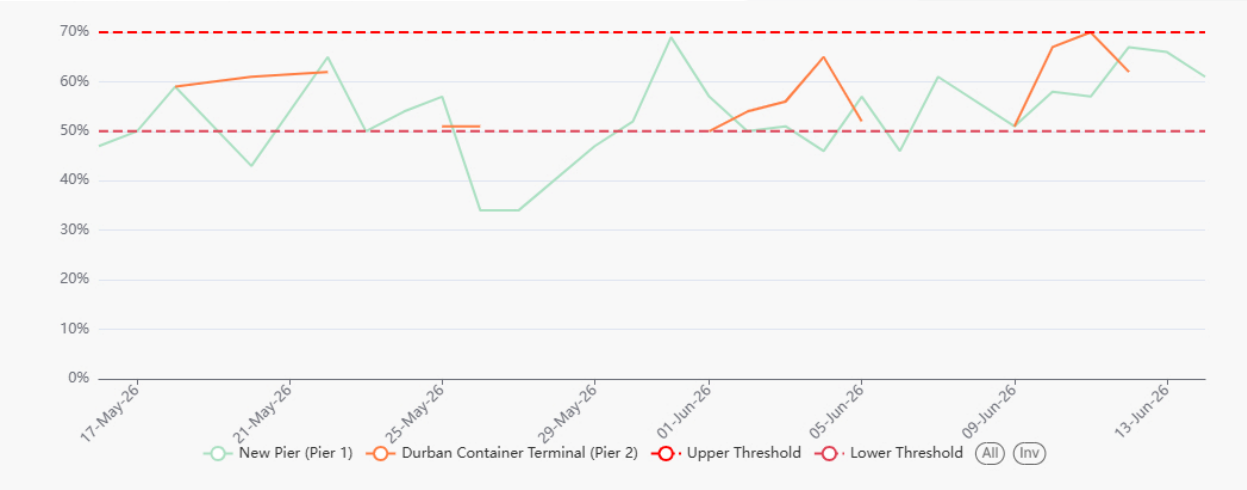
Table 4 – Vessel Dwell Time

Port	Terminal	Average Time at Anchorage (days)	Average Time at Berth (days)
Cape Town	CTCT	0.6	2.7
Cape Town	FPT	-	4.5
Cape Town	MPT	2.3	1.2
Durban	Pier 2	1.1	3.7
Durban	Pier 1	1.5	1.6
East London	MPT	-	3.6
Ngqura	NCT	2.7	2.2
Port Elizabeth	PECT	1.9	1.5

Source: Calculated from Marine Traffic AIS data, 2026. Updated 10/06/2026.

The following figure shows daily stack occupancy in Durban across the last two weeks or so:

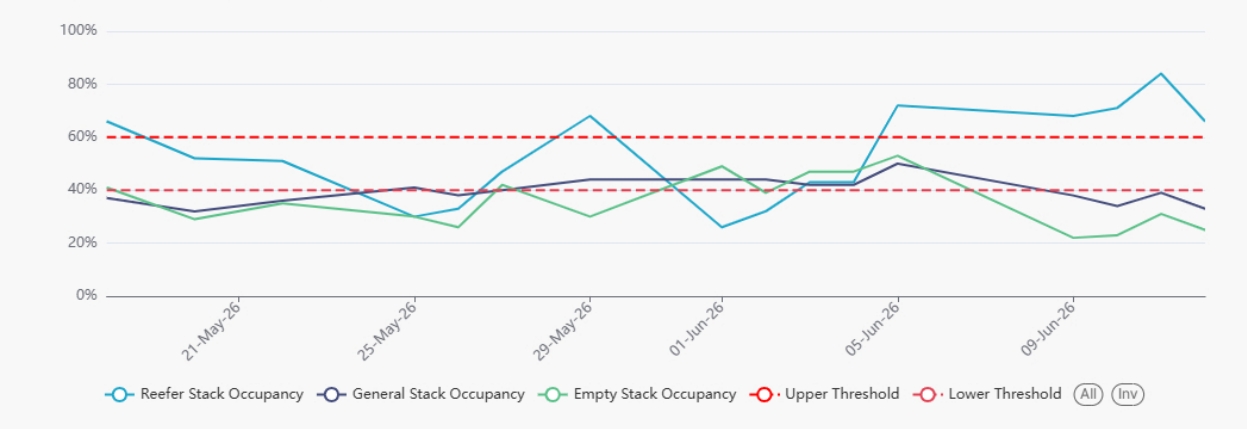
Figure 4 – Stack occupancy in Durban, general-purpose containers (16 May to present; day on day)



Source: Calculated using data from Transnet, 2026, and updated 14/06/2026.

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 (16 May to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 14/06/2026.

b. TNPA: May update

TNPA has released consolidated port statistics for May[6], with the figures showing that:

- Container throughput totalled **342,363 TEUs**, which is up by **↑12%** (m/m), but down **↓1%** (y/y).
- Total bulk cargo totalled **17,6 million tonnes**, which is down by **↓1%** (m/m) and approximately similar to last year (**↑0.1%**, y/y).
- Vehicle throughput totalled **62,300 units**, which is down by **↓14%** (m/m), but up **↑2%** (y/y).

The following table shows the changes from April per sub-sector group:

[6] Transnet. 2026. Port statistics.

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

	Apr	May	Movement	% change
Containers (TEUs)	**304,955**	**342,363**	**37,408**	**12%**
Landed	146,909	182,496	35,587	24%
Shipped	158,046	159,867	1,821	1%
Dry bulk (MT)	14,994,078	13,512,000	-1,482,078	-10%
Liquid bulk (MT)	2,264,840	3,554,078	1,289,238	57%
Breakbulk (MT)	608,779	554,915	-53,864	-9%
Vehicles (Units)	72,232	62,300	-9,932	-14%
Total cargo (excl. Vehicles)	**17,867,697**	**17,620,993**	**-246,704**	**-1%**

Source: Calculated from TNPA, updated 11/06/2026.

The main throughput levels are approximately similar to last year, but down in comparison to pre-pandemic numbers of 2019:

Table 6 – TNPA – Cyclical volume and growth: May 2019, 2025, and 2026

	2019	2025	2026	Growth: '19-'26	Growth: '25-'26
Containers (TEUs)	**368,223**	**346,480**	**342,363**	**-7%**	**-1%**
Landed	194,968	167,826	182,496	-6%	9%
Shipped	173,255	178,654	159,867	-8%	-11%
Dry bulk (MT)	16,945,481	14,228,886	13,512,000	-20%	-5%
Liquid bulk (MT)	3,939,730	2,916,933	3,554,078	-10%	22%
Breakbulk (MT)	674,743	492,083	554,915	-18%	13%
Vehicles (Units)	59,886	61,292	62,300	4%	2%
Total cargo (excl. Vehicles)	**21,559,954**	**17,637,901**	**17,620,993**	**-18%**	**0%**

Source: Calculated from TNPA, updated 11/06/2026.

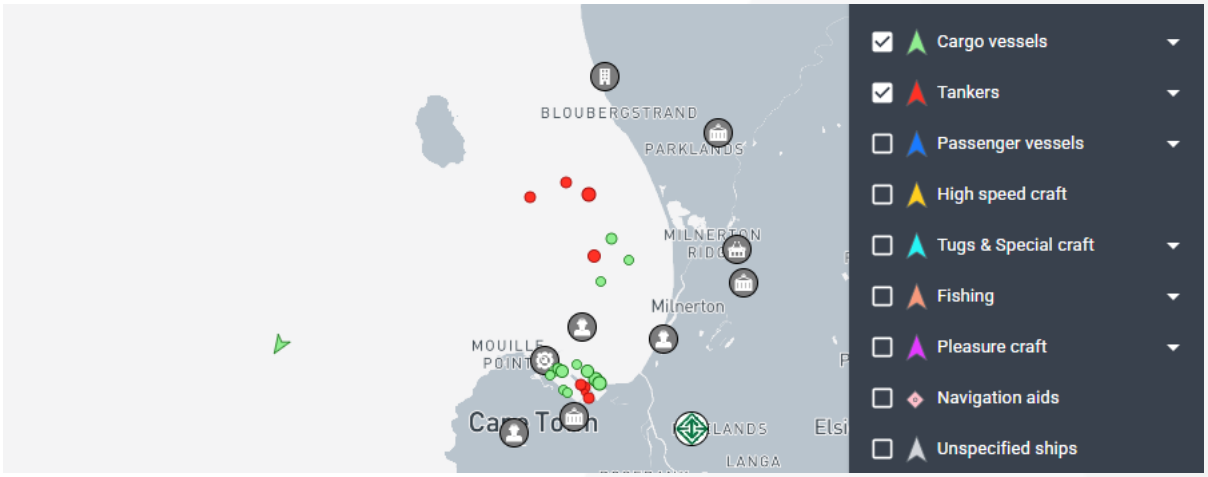
c. Summary of port operations

i. Cape Town

The Cape Town Container Terminal reported stable waterside movements, with a marginal decline of 1% from the previous week, in part due to poor weather conditions. Vessel activities remained steady, with an average of one or two vessels at anchorage, waiting around 11 hours, and three vessels at berth working for around 72 hours. Equipment availability remained strong, with an average of seven out of 9 cranes and 31 out of 32 RTGs available throughout the week.

Cape Town Multi-Purpose Terminal reported a significant reduction in activity, with waterside volumes declining significantly from the previous week (down **↓68%**). Vessels spend an average of 20 hours at anchorage and 35 hours at berth. Equipment availability remained consistent, with an average of two out of three cranes and three out of five straddle carriers available throughout the week.

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



Source: Marine Traffic. Updated 14/06/2026 at 14:00.

ii. Durban

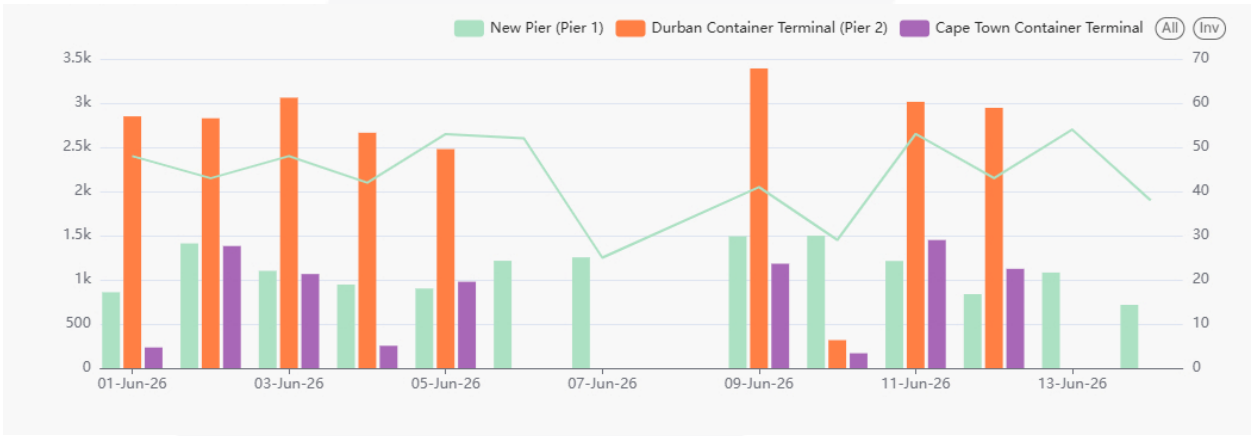
Pier 1 reported a minor decline in waterside volumes, though equipment availability remained strong with an average of five out of seven cranes and 20 out of 25 RTGs available throughout the week. Vessels spent an average of 24 hours at berth and 50 hours at berth. The **TTT** for the week averaged **~42 minutes** (**↓5%**, w/w), and the average **staging time** was **~24 minutes** (**↑9%**).

Durban Gateway Terminal's estimated waterside volumes appear to be down significantly, from an average of 3,873 container moves per day to 2,661 moves per day. Vessels spent an average of 38 hours at anchorage and 75 hours at berth. Road and rail volumes remained steady throughout the week, though stack and rail occupancy increased towards the end of the week.

Durban Multi-Purpose Terminal reported a minor decline in waterside volumes from the previous week. Vessels spent an average of five hours waiting at anchorage and 42 hours at berth. The terminal reported an average of three out of four cranes available throughout the week.

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.

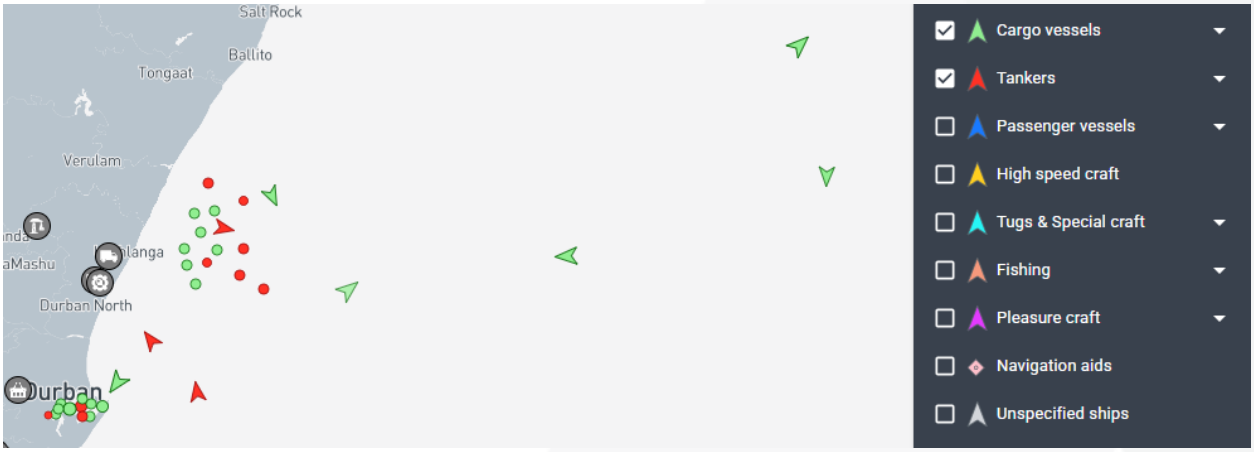
Figure 7 – Durban & Cape Town: Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 14/06/2026.

The queue of container vessels waiting outside Durban **was again stable** this week. On Wednesday morning (17 June), **one** container vessels were waiting outside at anchorage for Durban, **one** for DGT. The queue of dry (**four**), liquid (**seven**), and breakbulk (**two**) **was stable** from last week:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 14/06/2026 at 14:00.

iii. Eastern Cape

Ngqura Container Terminal reported a strong week, with a significant increase in waterside volumes. Stack occupancy remained stable, with a steady equipment availability, throughout the week, with an average of seven out of eight operational cranes and 24 out of 30 RTGs. Vessels spent an average of 56 hours at anchorage and 71 hours at berth.

Port Elizabeth Container Terminal had a similarly strong week, with significant improvements in waterside movements from the previous week. Vessels spent an average of 138 hours at anchorage and 41 hours at berth, despite higher volumes, indicating that the terminal has started working on clearing a backlog of vessels, likely attributed, in part, to weather delays the previous week. Equipment availability remained consistent, with an average of three out of three containers and 10 out of 11 straddle carriers available throughout the week.

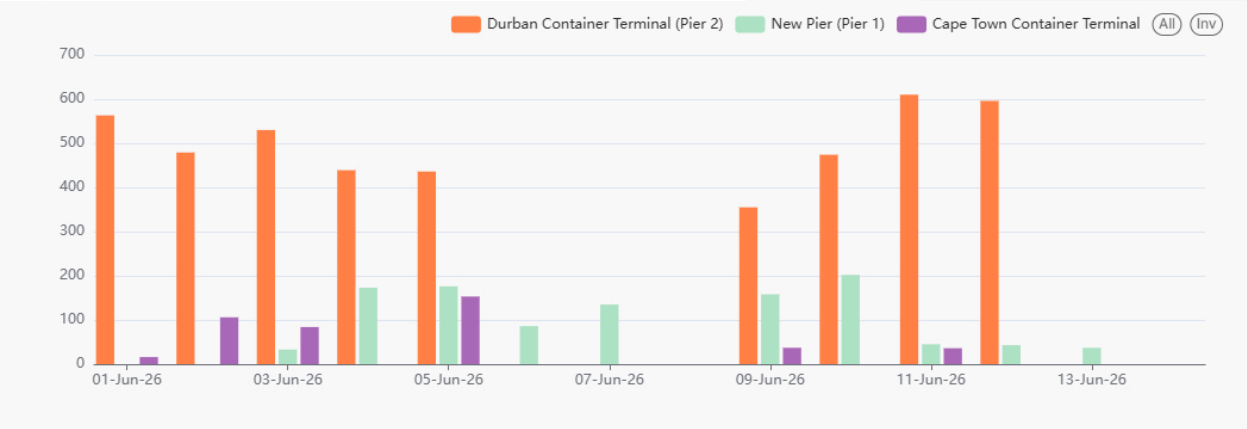
iv. Richards Bay

The daily average coal throughput for the week increased considerably and averaged roughly **167,000 tons** (**↑28%**, w/w) a day. An average of **16 trains** was serviced on the landside (down from last week's **18**), and **below the target** (**22** trains).

v. Transnet Freight Rail (TFR)

In the last week (*8 to 14 June*), rail cargo on the ConCor line out of Durban was reported at **3,161** containers, up by **↑4%** from the previous week's **3,050** containers.

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



Source: Calculated using data from Transnet, 2025. Updated 14/06/2026.

2. Air Cargo Update

a. International air cargo

As mentioned last week, the following table shows the inbound and outbound air cargo flows to and from ORTIA for last week (*8 to 14 June*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *June 2025* averaged **~894,958 kg**.

Table 7 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Vol.	Change (w/w)
Volume inbound	**636,826**	**4,457,785**	**↑16%**
Volume outbound	**358,991**	**2,512,937**	**↓3%**
Total	**995,817**	**6,970,722**	**↑9%**

Courtesy of ACOC. Updated: 14/06/2026.

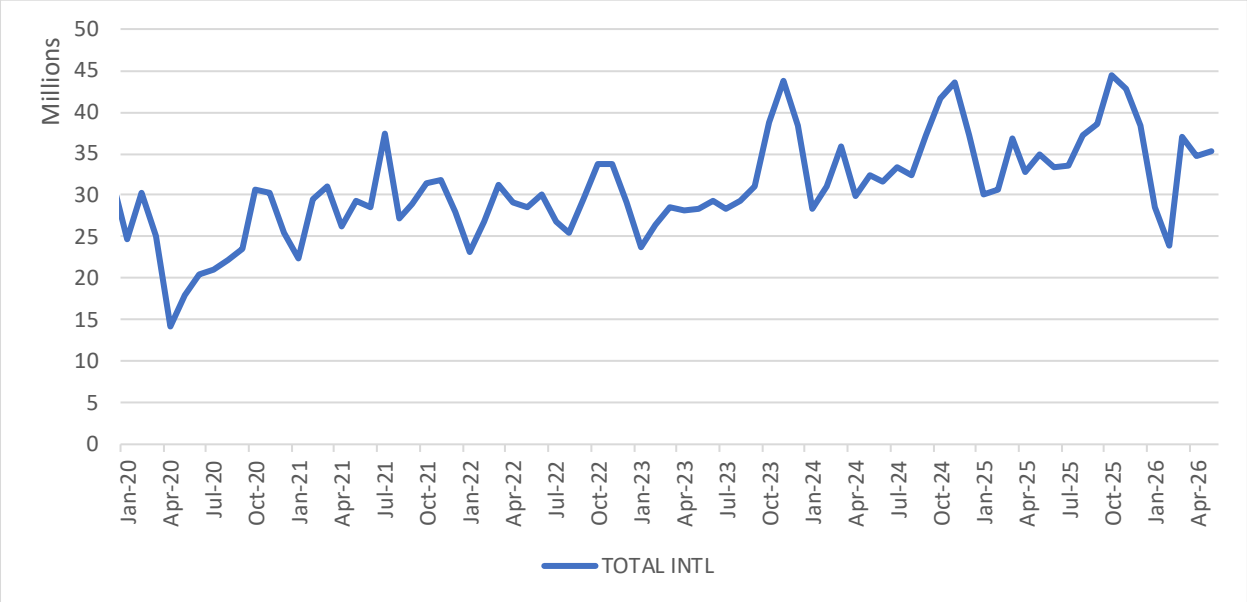
This week's international cargo flows increased substantially for inbound cargoes, as outbound cargoes were mostly steady. The daily average amounted to **~639,000 kg** inbound (**↑16%**, w/w) and **~359,000 kg** outbound (**↓3%**). Current volumes to and from ORTIA remain above the commensurate volumes of June last year (**↑11%**) and also above the pre-pandemic June of 2019 (**↑10%**).

For the full month of May, a slight rebound was evident after the reduction because of the turmoil in the Gulf and the overall global reductions in air freight:

- Johannesburg increased by **↑4%** (m/m) versus April and is up by **↑5%** (y/y) versus 2025.
- Cape Town – on the other hand – decreased by **↓10%** (m/m) and by **↓11%** (y/y) versus 2025.
- Durban increased by **↑26%** (m/m) but remains down by **↓17%** (y/y).
- Consequently, total international air cargo for May 2026 is up by **↑2%** (m/m) – and up by nearly the same amount versus 2025 (**↑1%**).

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: 26/05/2026.

The latest reported fuel stock days (as of Friday, 19 June) per airport indicate:

- ORTIA: **10.7 days** (target: 5 days)
- CTIA: **4.1 days** (target: 4 days)
- Durban: **9.4 days** (target: 5 days)

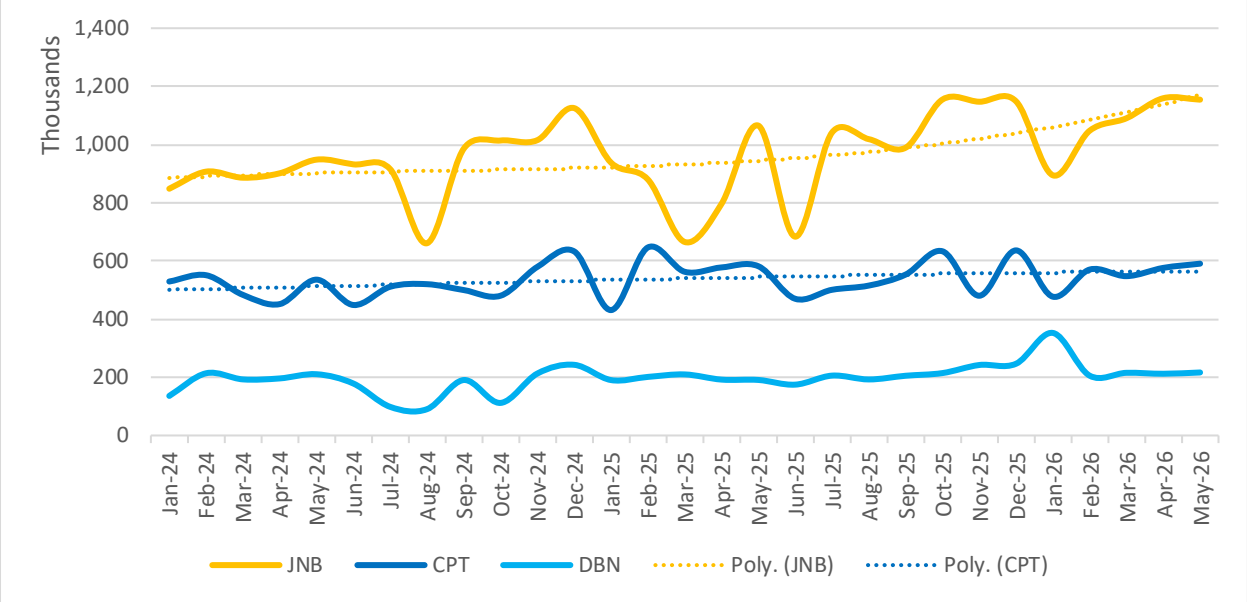
b. Domestic air cargo

For May, domestic volumes handled at our three main terminals mostly increased:

- Johannesburg was stable (m/m) versus April and is up by **↑8%** (y/y) versus 2025.
- Cape Town increased by **↑3%** (m/m) and is up by **↑2%** (y/y) versus 2025.
- Durban increased by **↑2%** (m/m), but up by **↑13%** (y/y) versus 2025.
- Consequently, total monthly domestic air cargo for May was up by **↑1%** (m/m) and **↑7%** (y/y).

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 26/05/2026.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*8 to 14 June)*, movements decreased by about **38 trucks**, as trains from KM4 to Maputo also slightly decreased (an average of **1 train per day**).

- Truck volumes through the border post decreased slightly to **1,445 HGVs per day** (**↓3%**, w/w).
- Overall, queue times increased to an average of **~4.7 hours** (**↑24%**) at the border.
- The average processing times also increased at an average of **~4.4 hours** (**↑26%**) 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	1,445	1,398	1,121	201	34	65	39	230
% (w/w)	**-3%**	**-5%**	**-4%**	**-1%**	**-22%**	**2%**	**17%**	**-2%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 14/06/2026.

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 14/06/2026 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 May:

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

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	15,668	**9%**	8,178	**20%**	23,846	**13%**
Groblersbrug	7,168	**12%**	4,543	**-15%**	11,711	**0%**
Kopfontein	6,104	**2%**	1,737	**99%**	7,841	**14%**
Lebombo	44,373	**-3%**	42,110	**5%**	90,752	**5%**
Ramatlabama	5,305	**-10%**	2,288	**16%**	7,593	**-4%**
Skilpadshek	8,907	**8%**	2,382	**26%**	11,289	**12%**

Source: TransAfricaBorder, 10/06/2026.

Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts increased by **↓6.1%** (m/m). Northbound traffic (Eastbound for Lebombo) was mixed, with substantial increases at **Groblersbrug** (**↑12%**), **Beitbridge** (**↑9%**) and **Skilpadshek** (**↑8%**), and a substantial decrease at Ramatlabama (**↓10%**). Southbound traffic (Westbound for Lebombo) increased significantly at **Kopfontein** (**↑99%**), **Skilpadshek** (**↑26%**) and Beitbridge (**↑20%**).

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

- Overall, the average queue time decreased by slightly more than **an hour** from last week, as transit time went in the opposite direction and decreased by nearly **an hour**.
- The median border crossing times at South African borders decreased by **an hour and a half** on average, averaging **~8.2 hrs** (**↓16%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased by approximately **an hour**, averaging **~7.1 hrs** (**↓11%**).

1. **Kazungula / Zambia–Botswana corridor:**
    a. BURS issued a notice on 8 June indicating that, due to elevated theft risks involving high-value consignments, particularly vehicles transiting south through Kazungula, such cargo must now move in sealable transport units, effective 30 May.
    b. Zambia also issued stricter risk-management requirements for pre-clearance, with all northbound trucks through Kazungula required to be fully pre-cleared and all applicable fees, special releases, and declarations paid before approaching the border.
    c. Southbound traffic should only proceed to the border once pre-cleared by both Zambia and Botswana and after receiving a formal "proceed to border" notification.
    d. By Thursday morning, the northbound queue at Kazungula was measured at more than 3 km, indicating continued pressure on border processing.
2. **Lebombo:**
    a. Urgent construction and repairs to speed humps constrained traffic flow, with at least three export lanes unavailable and only two import lanes operational at one stage.
    b. A separate enforcement concern was raised after an apparently overloaded taxi and trailer was observed crossing at Lebombo, reportedly receiving preferential movement despite an unstable and visibly non-compliant load.
3. **Zimbabwe corridor:**
    a. An overturned truck near the Mvuma turn-off on the Masvingo–Harare road partially blocked the road, with road users advised to use alternative routes.

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

Table 10 – Delays[7] summary – South African borders[8] (both directions)

Border Post	Direction	HGV[9] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	584	23.1	5.1	23.1	17,520	4,088
Beitbridge	Zimbabwe-SA	507	4.3	1.3	4.2	15,210	3,549
Groblersbrug	SA-Botswana	233	11.2	2.0	11.1	6,990	1,631
Martin's Drift	Botswana-SA	144	1.9	0.2	1.6	4,320	1,008
Kopfontein	SA-Botswana	206	10.7	3.1	10.4	6,180	1,442
Tlokweng	Botswana-SA	45	0.6	0.2	0.4	1,350	315
Vioolsdrift	SA-Namibia	30	5.3	1.1	5.2	900	210
Noordoewer	Namibia-SA	20	2.8	0.4	2.5	600	140
Nakop	SA-Namibia	30	4.0	0.5	3.6	900	210
Ariamsvlei	Namibia-SA	20	1.2	0.4	1.1	600	140
Skilpadshek	SA-Botswana	264	5.1	1.5	5.1	7,920	1,848
Pioneer Gate	Botswana-SA	88	2.7	1.1	2.4	2,640	616
Ramatlabama	SA-Botswana	144	3.0	0.3	2.6	4,320	1,008
Ramatlabama	Botswana-SA	77	0.7	0.2	0.4	2,310	539
Lebombo	SA-Mozambique	1,540	4.7	1.2	4.4	46,200	10,780
Ressano Garcia	Mozambique-SA	1,464	1.6	0.3	1.4	43,920	10,248

[7] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[8] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[9] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Border Post	Direction	HGV[9] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Sum/Average			**5,396**	**5.2**	**1.2**	**5.0**	**161,880**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 07/06/2026.

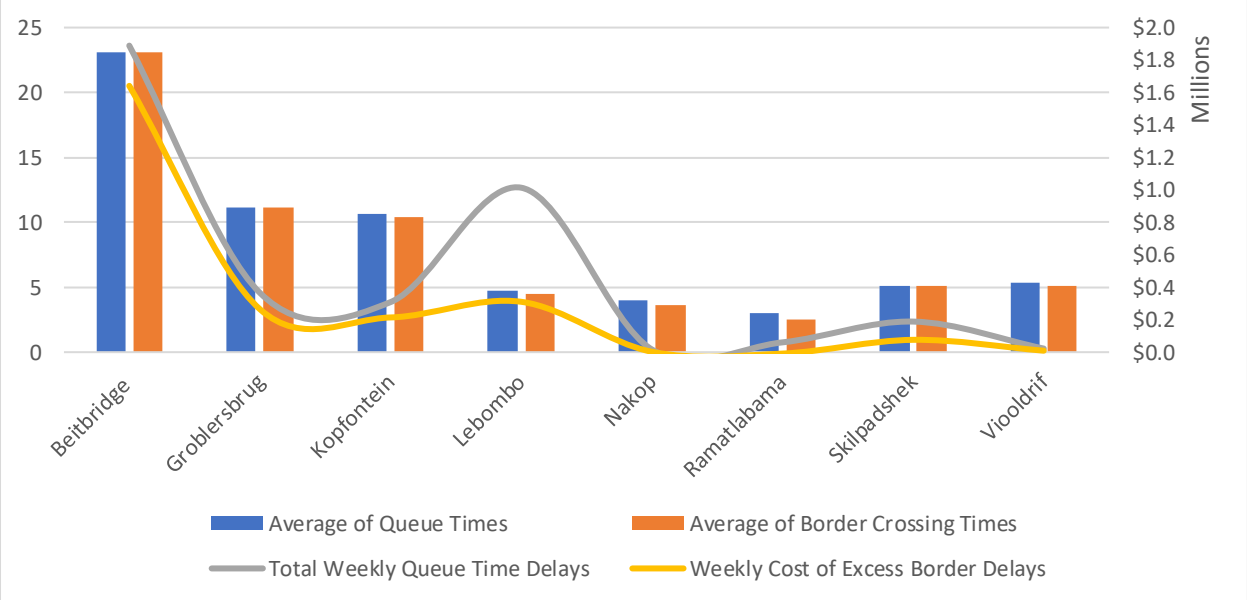
Table 11 – Delays summary – Corridor perspective

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	9.6	2.5	9.3	9,600	2,240
Central Corridor	798	1.3	0.0	0.3	23,940	5,586
Dar Es Salaam Corridor	1,819	22.9	3.3	22.8	54,570	12,733
Maputo Corridor	3,004	3.2	0.7	2.9	90,120	21,028
Nacala Corridor	127	0.0	0.0	0.0	3,810	889
North/South Corridor	3,593	16.3	2.9	16.3	107,790	25,151
Northern Corridor	2,817	0.3	0.0	0.3	92,520	21,588
WBNLD Corridor	854	3.4	0.9	3.2	25,620	5,978
Trans Cunene Corridor	100	3.3	0.6	3.1	3,000	700
Trans Kalahari Corridor	100	0.0	0.0	0.0	3,000	700
Trans Oranje Corridor	116	20.6	1.9	20.3	3,480	812
Sum/Average	**13,648**	**7.5**	**1.2**	**7.2**	**417,450**	**97,405**

Source: Calculated from TransAfricaBorder & Crickmay, week ending 07/06/2026.

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

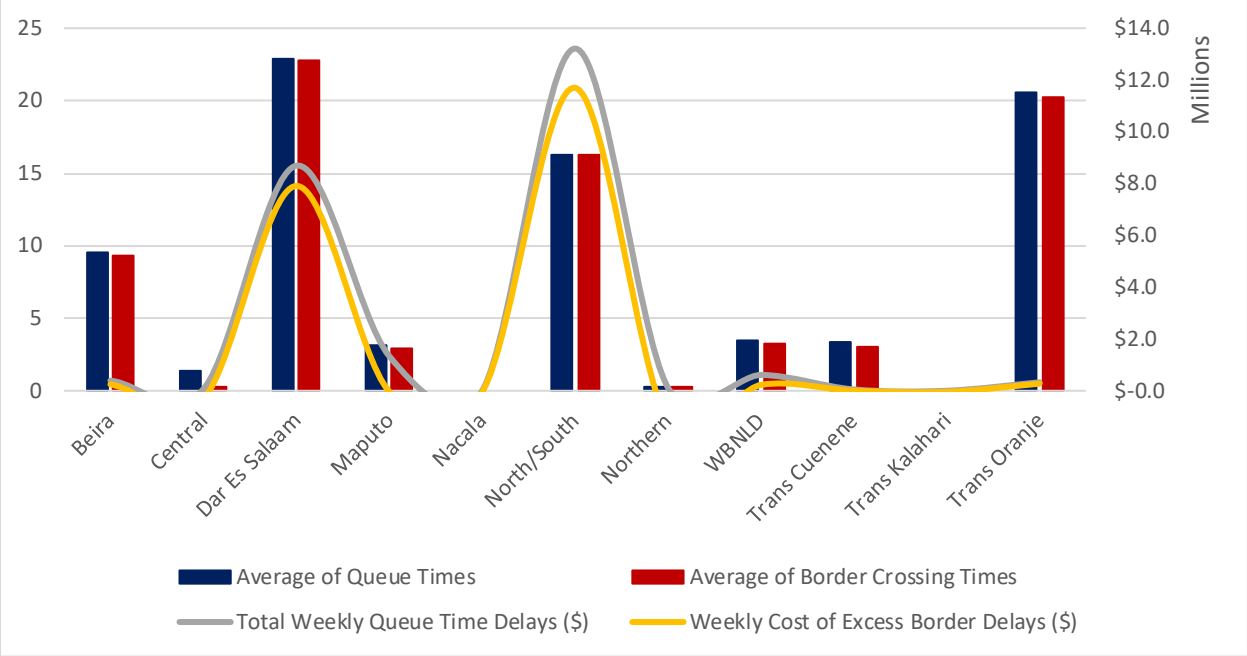
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: Calculated from TransAfricaBorder & Crickmay week ending 07/06/2026.

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 & Crickmay, week ending 07/06/2026.

In summary, cross-border queue time averaged **~7.5 hours** (up by **~1.1 hours** from the previous week's **~6.3 hours**), indirectly costing the transport industry an estimated **$24.8 million** (**R401 million**). Furthermore, the week's average cross-border transit times hovered around **~7.2 hours** (down by **~0.9 hours** from the **~8.2 hours** recorded in the previous report), at an indirect cost to the transport industry of **$18.7 million** (**R303 million**). The total indirect cost for the week amounts to an estimated **~$43.5 million** (**R704 million**, up by **↑22%** from the **~R575million** in the previous report).

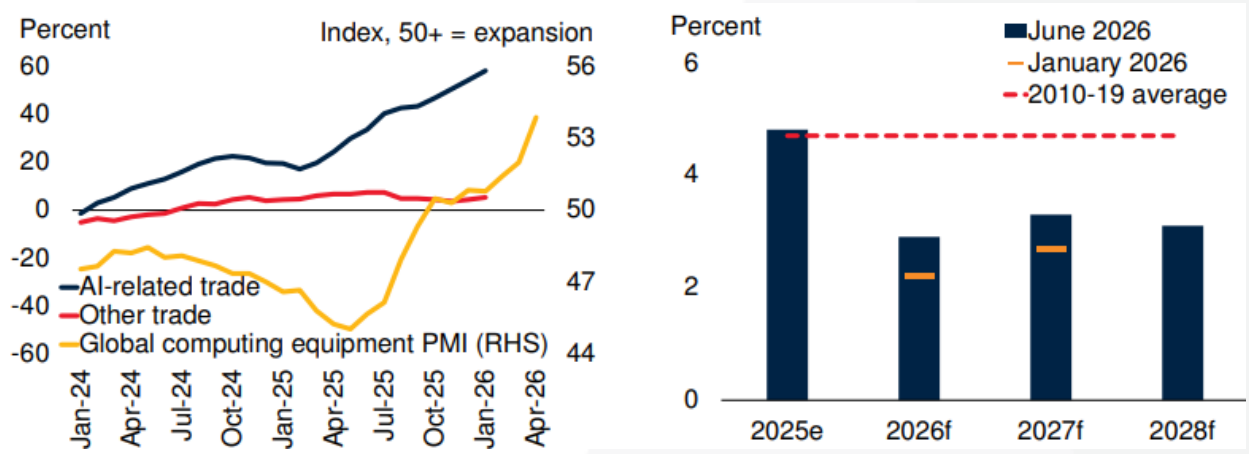
4. International Update

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

a. Global economy

The World Bank's latest *Global Economic Prospects* report indicates that the Middle East conflict and disruption to shipping through the Strait of Hormuz have materially weakened the global outlook. Global growth is projected to slow from **↑2.9%** in 2025 to **↑2.5%** in 2026, the weakest rate since the pandemic, before improving to around **↑2.8%** over 2027–28 as energy supplies recover, monetary easing resumes, and trade strengthens. The report assumes severe Hormuz-related disruption through July, with shipping volumes only gradually returning towards pre-conflict levels by year-end. This has already pushed energy, LNG and fertiliser prices sharply higher, adding to inflation, food-security risks, and pressure on energy-importing economies. Global trade growth is expected to slow from **↑4.8%** in 2025 to **↑2.9%** in 2026, although AI-related demand continues to support selected high-technology manufacturing and services trade, particularly in economies with the digital infrastructure, skills base and energy capacity to capture these gains.

Figure 15 – AI-related trade and global computing equipment PMI & Global trade growth



Source: World Bank

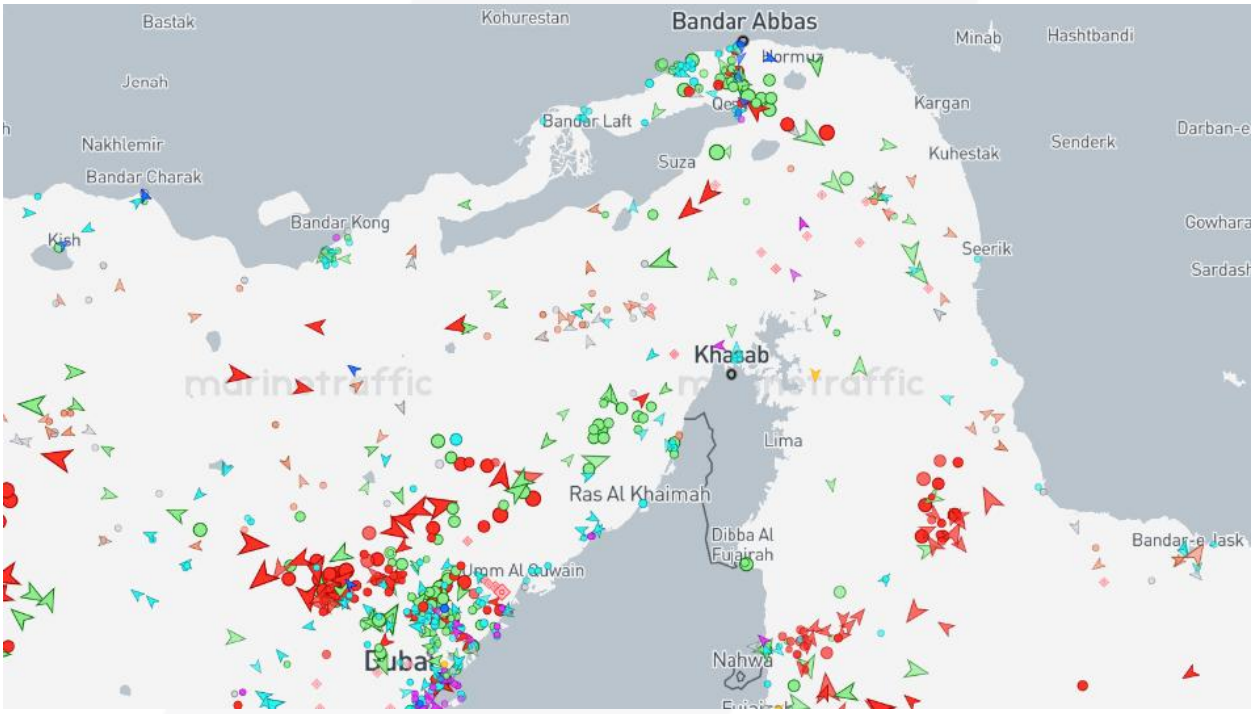
For South Africa, the World Bank projects modest growth of **↑1.0%** in 2026, rising to **↑1.5%** in 2027 and **↑1.7%** in 2028, underscoring a weak domestic growth trajectory despite some reform momentum.

b. Global shipping industry

i. Strait of Hormuz/Iran conflict

The reported reopening of the Strait of Hormuz and the US-Iran peace agreement have eased the most acute supply-chain risk, but the recovery in Gulf flows is likely to be gradual rather than instantaneous. Linerlytica estimates that reopening could release around **51 containerships**, with approximately **300,000 TEU** of capacity currently stranded in the Persian Gulf, providing short-term relief to an already stretched container market.

Figure 16 – Strait of Hormuz (Friday, 19 June 08:00)



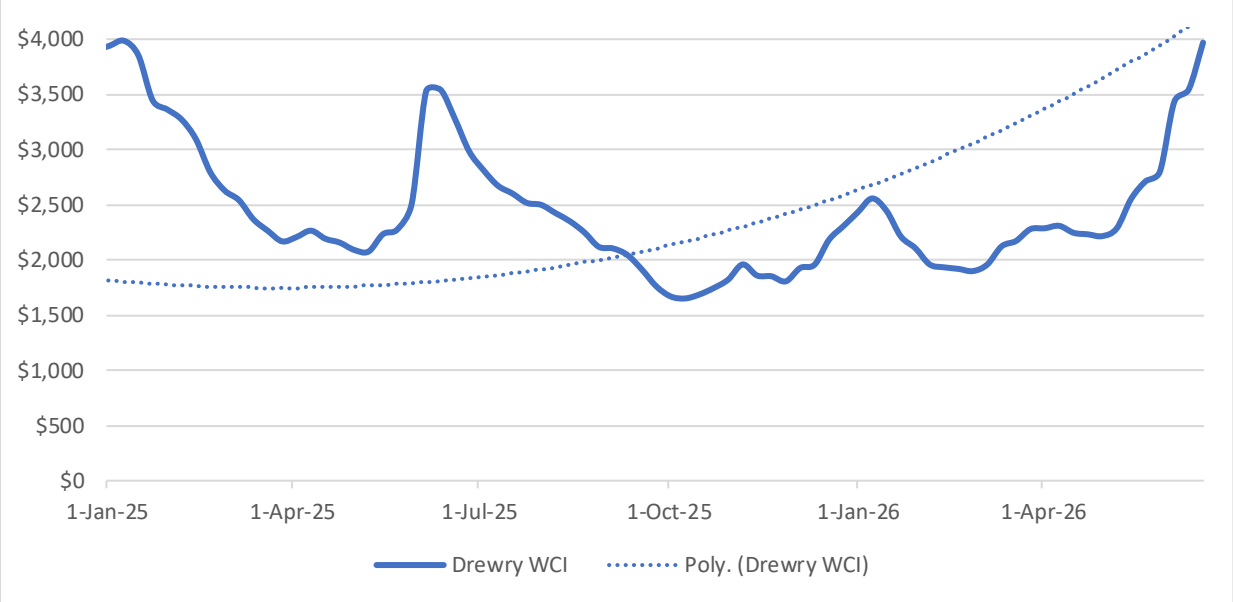
Source: Marine Traffic

However, carriers are unlikely to restore regular Gulf rotations immediately. The first phase will probably involve evacuating trapped tonnage and clearing backlogged cargo, followed by cautious service reinstatement subject to naval-security guarantees, port readiness, insurance pricing, and crew-risk protocols. Reuters similarly reports that oil and tanker movements have started to resume, but that shippers remain cautious until safe passage is consistently demonstrated. For container lines, the immediate implication is some easing of vessel scarcity and schedule pressure, but not a rapid normalisation of freight rates. Carriers will probably maintain contingency routings, war-risk surcharges, and selective bookings into Gulf ports until political and operational confidence improves.

ii. Container freight rates

Freight rates continued to strengthen sharply this week, with Drewry's "*World Container Index*" (WCI) increasing by **↑12% to $3 969 per 40ft container**, its highest level in 18 months.

Figure 17 – World Container Index ($/FEU)



Source: Calculated from Drewry

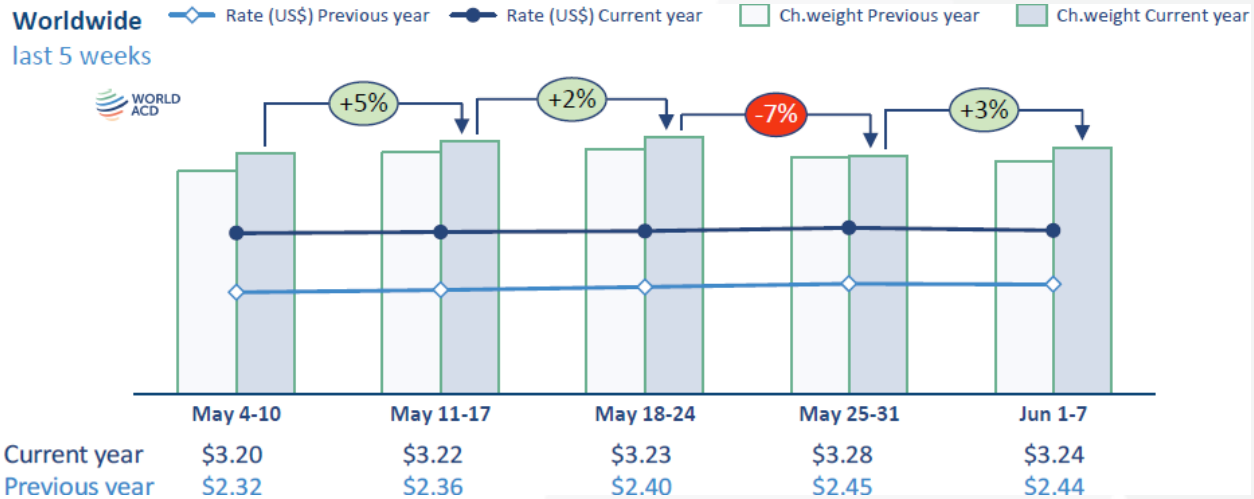
The increase was again concentrated on the main East–West trades, especially the Transpacific and Asia–Europe routes. On the Transpacific, Shanghai–New York rates rose by **↑15%** to **$6 769/FEU**, while Shanghai–Los Angeles increased by **↑10%** to **$5 142/FEU**, supported by cargo frontloading ahead of expected US tariff changes and continued carrier capacity management, including blank sailings. Asia–Europe rates also moved higher, with Shanghai–Rotterdam up **↑15%** to **$4 342/FEU** and Shanghai–Genoa up **↑12%** to **$5 756/FEU**. Drewry notes that peak-season demand, tighter capacity, higher FAK rates and further peak-season surcharges are keeping upward pressure on spot rates, even as the US-Iran interim agreement has improved market sentiment by reducing immediate Strait of Hormuz-related risk.

c. Global air cargo industry

The high-frequency WorldACD data, international air cargo activity recovered in early June after the prior week's holiday-driven contraction across Europe, the United States, MESA and Africa. WorldACD reports that global chargeable weight rebounded by **↑3%** (w/w) in week 23, following a **↓7%** fall, supported mainly by stronger outbound volumes from North America (**↑16%**) and MESA (**↑13%**). However, two-week

comparisons remain softer, with worldwide chargeable weight down **↓5%**, and Africa and MESA particularly affected at **↓12%** and **↓13%**, respectively.

Figure 18 – Chargeable weight and rates (past five weeks)



Source: World ACD

Capacity recovered modestly by **↑1%** (w/w), led by MESA and Africa, although MESA capacity remains materially below pre-conflict levels. Global rates eased by **↓1%** (w/w) to **$3.24/kg** but remain **↑33%** (y/y), indicating still-elevated pricing despite lower fuel prices.

ENDS[10]

[10]**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.*