

Cargo Movement Update #264¹

Date: 11 January 2026

Weekly Snapshot

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

Flows	Current ²			Previous ³			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	20 251	23 071	43 322	22 676	29 157	51 833	↓16%
Air Cargo (tons)	2 061	1 613	3 674	3 089	2 008	5 096	↓28%

Monthly Snapshot

Figure 1 – Cyclical⁴ monthly cargo volume, year on year (most metrics: Dec '24 vs Dec '25, % growth)

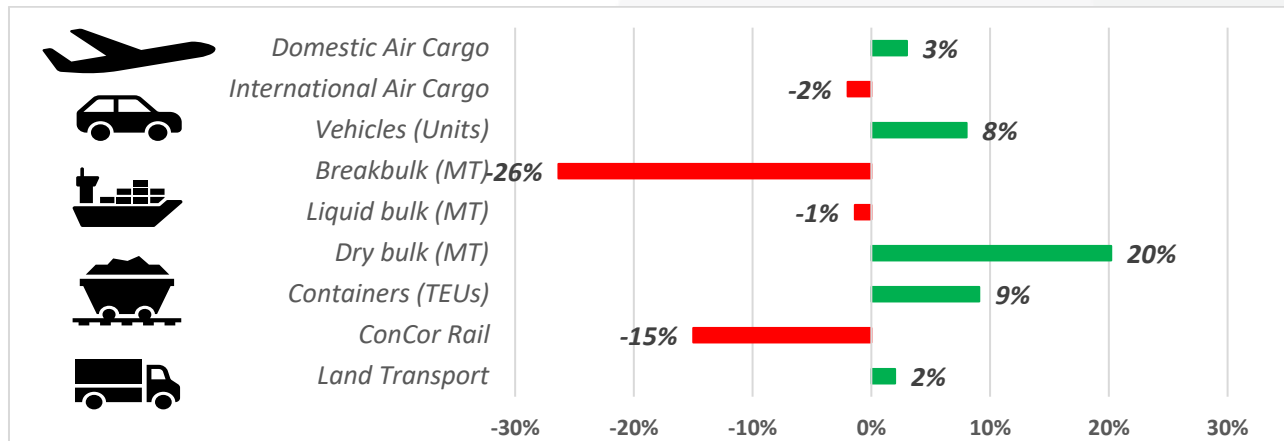
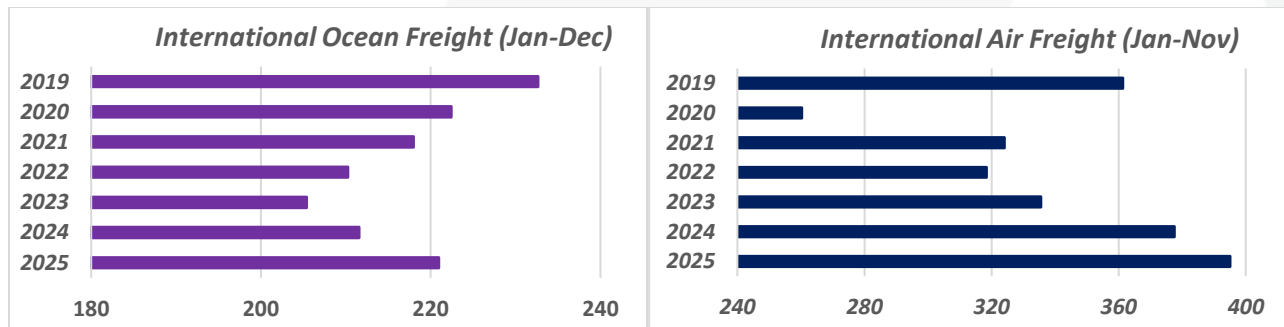


Figure 2 – Year-to-date flows 2019-2025⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~6 187⁶ TEUs were handled per day, with ~6,840 TEUs projected for next week.
- TNPA Dec: TEUs: ↓4% (m/m), ↑9% (y/y) & ↑3,2% (YTD). Bulk: ↓2% (m/m), ↓2% (y/y) & ↑4,4% (YTD).
- Rail cargo handled out of Durban was reported at 3,872 containers, up by ↑63% from last week.
- Cross-border queue: unchanged; transit: ↓0,4 hrs; SA borders: ~8,4 hrs (↓33%); SADC: ~5,2 hrs (unchanged).
- Global spot rates rose by ↑17,2% (or \$375) to \$2 557/40ft between end-2025 and early-2026.
- IATA reports that global air cargo demand (CTKs) rose ↑5,5% (y/y) in November 2025.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 264th update.

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

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

⁴ 'Monthly' means the last months' worth of available data compared to the same month in the previous year. Most: Dec vs. Dec; except Air (Nov).

⁵ Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

⁶ Figures for this week onward exclude volumes handled by DGT, as the data was not available at the time of reporting

Executive Summary

This update – the *first for 2026* – provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **6,189 TEUs** was handled daily, a decrease from **7,405 TEUs** the previous week.

Port operations were significantly impacted by weather delays across the Eastern and Western Regions, with the KwaZulu-Natal receiving the knock-on effect of their scheduled vessels being delayed at other ports. In contrast, most terminals reported a steady rate of equipment availability throughout the first two weeks of the year, with one or two non-operational cranes, in some instances on empty berths. In addition, the Durban Auto Terminal announced that they had reached their budgeted volumes well before the financial year end, and continues to outperform their targeted volumes frequently.

Global trade enters 2026 amid slower economic growth, heightened policy uncertainty, and ongoing structural realignment. Global GDP growth is projected at approximately **2,6–2,7%**, below pre-pandemic trends, with subdued investment reflecting geopolitical fragmentation, rising protectionism, and tighter regulatory regimes. These dynamics are reshaping trade patterns, alongside longer-term shifts such as expanding digitally deliverable services, stronger South–South trade, and stricter environmental standards.

In transport and shipping, container volumes remain resilient despite weak seasonality. Global container throughput continues to outperform expectations year-on-year, even as freight rates remain materially below 2025 levels. Structural overcapacity persists, constraining pricing power, although early-2026 rate increases reflect short-term operational and seasonal factors. Regionally, Sub-Saharan African imports remain a relative bright spot, while exports have softened. Operationally, tentative recovery in Suez transits, selective capacity deployment, and weather-related port disruptions underscore the industry's continued emphasis on resilience, diversification, and risk management at the start of the year.

International air cargo to South Africa was significantly reduced this week. The daily average of air cargo handled amounted to **~294,381 kg** inbound (**↓33%**, w/w) and **~230,406 kg** outbound (**↓20%**). Consequently, because of the reduction, the current levels are significantly below last year's level (**~↓37%**) and the comparative levels of pre-pandemic 2019 (**~↓35%**), as volumes across the New Year period in January typically reduce significantly. Despite the slowdown towards the end of the year, total air freight to and from ORTIA in 2025 totalled **350 million kilograms**, which is up by **↑0,7%** (y/y) on the 2024 total year-to-date air freight.

Global air cargo markets continued to demonstrate resilience toward the end of 2025, with international demand rising by around **↑7%** (w/w), outpacing capacity growth of roughly **↑5%**, and supporting broadly stable load factors despite seasonal volatility. While late-December adjustments led to a short-term contraction in activity—with capacity down about **↓9%** and chargeable weight falling by around **↓30%** over a two-week period—these movements were consistent with historical year-end patterns rather than a demand shock. High-frequency indicators nonetheless point to a structurally supportive demand environment, led by Asia-Pacific trade lanes, reinforcing air cargo's role as a critical enabler of global trade under uncertain conditions.

On the N4 corridor, movements increased substantially for road transport – recovering from the Festive Season, while reporting for rail transport was sparse. Truck volumes through the border post increased to around **1,300 HGVs per day** (**↑20%**, w/w). Queue times were stable at an average of **~2,8 hours** at the border. The average processing time decreased to an average of **~2,5 hours** per crossing.

In the SADC region, cross-border road transport times were, on average, decreased slightly this week. Overall, the average queue time was unchanged from last week, while transit time decreased by about **20 minutes**. The median border crossing times at South African borders decreased by more than **four hours**, averaging **~8,4 hrs (↓33%)** for the week. In contrast, the greater SADC region (excluding South African-controlled) was essentially unchanged, averaging **~5,2 hrs**. This week, on average, three SADC borders took around a day to cross, namely Beitbridge, Kasumbalesa (the worst affected, taking **around three days** from the **Zambian side**), and Katima Mulilo. Cross-border developments this week included **(1)** Zambia's announcement of higher toll fees for medium, heavy and abnormal goods vehicles – alongside plans for a new toll gate near Mazabuka – and **(2)** emerging plans by the Botswana Motorists' Association to relocate the Groblersbrug border post and develop a freight-dedicated bridge in response to rising corridor traffic.

In concluding the first report of 2026, our attention turns to consolidated throughput for the year just gone. Looking at aggregate performance, Transnet National Ports Authority's consolidated statistics for 2025 indicate a measured but meaningful improvement across South Africa's major cargo segments. Container throughput reached **4,473 million TEUs**, reflecting a **↑3,2%** year-on-year increase, while total bulk cargo volumes rose to **221 million tonnes**, up **↑4,4%** compared to 2024. Most notably, vehicle throughput increased sharply to **899,094 units**, representing a **↑15%** year-on-year expansion, underscoring the responsiveness of specific trade lanes and terminals where operational conditions and demand have aligned more favourably.

Looking ahead, South Africa's ability to translate recent logistics reforms into durable economic gains will depend on whether trade, transport and logistics are treated as integrated economic infrastructure rather than isolated operational functions. While essential milestones have been achieved (notably with the 25-year Transnet-ICTSI joint venture to operate and further develop the Durban Container Terminal Pier Two, which commenced at the turn of the year), sustained growth will hinge on continued institutional reform, improved system-wide coordination, and the capacity to raise throughput and reliability to — and beyond — pre-pandemic levels.

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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.

With the transition of Durban Container Terminal Pier 2 to Durban Gateway Terminal under ICTSI, reporting structures have been revised. As a result, DGT data is not included in this section of the report at present. This omission is noted with concern, and a constructive appeal is made to DGT leadership to reconsider this approach, as collaborative data-sharing practices are in the collective interest of all stakeholders and have demonstrably contributed to the system-wide performance improvements observed over the past 18 months.

Table 2 – Container Ports – Weekly flow reported for 5 to 11 January (measured in TEUs)

7-day flow reported (05/01/2026 – 11/01/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Gateway Terminal (Pier 2)	Since the transition from DCT to DGT, no information has been received.		
New Pier (Pier 1)	1 730	12 109	↓13%
Cape Town Container Terminal	1 739	12 173	↑44%
Ngqura Container Terminal	1 995	13 965	↓33%
Port Elizabeth Container Terminal	124	868	↓82%
Other	601	4 207	↑6%
Total	6 189	43 322	↓16%

Source: Calculated from TPT, 2026. Updated 11/01/2026.

An average of ~**6,189 TEUs** (↓16%) was handled per day for the last week (5 to 11 January, Table 2). Consequently, throughput was slightly below the projected average of ~**6,840 TEUs** (↓10% actual versus projected). For the coming week, an increased average of ~ **6,840 TEUs** (↑11%) is predicted to be handled (12 to 18 January, Table 3).

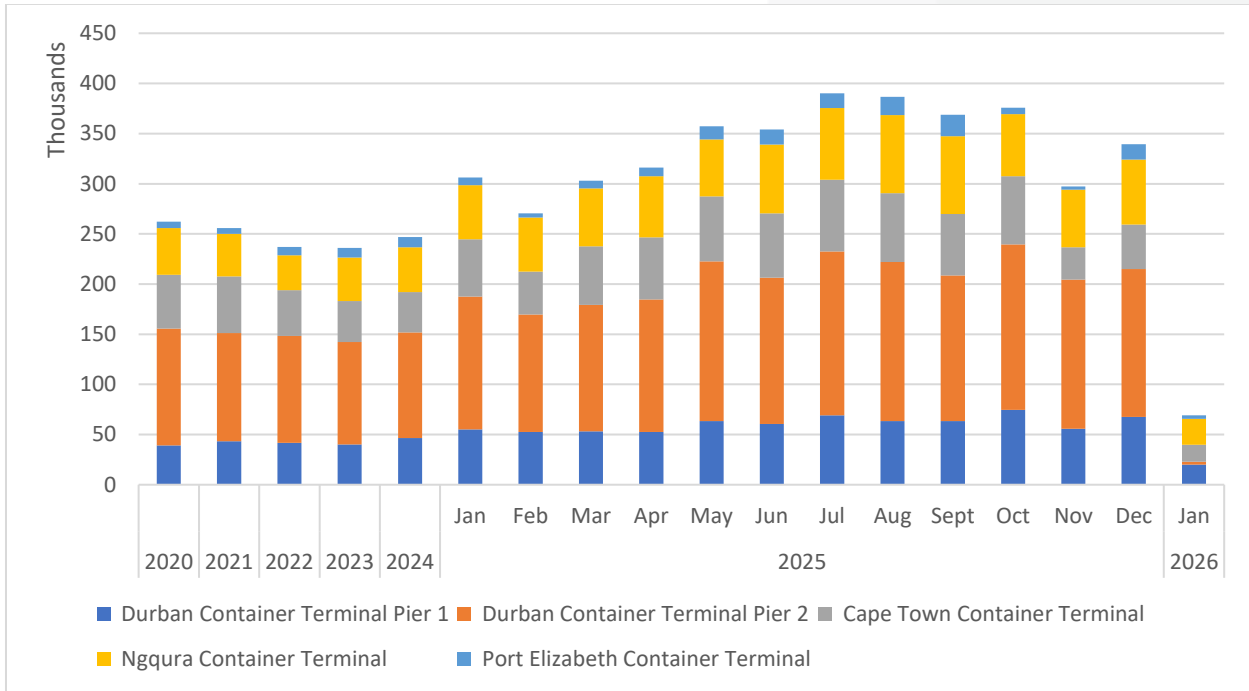
Table 3 – Container Ports – Weekly flow projected for 12 to 18 January (measured in TEUs)

7-day flow projected (12/01/2026 – 18/01/2026)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	Since the transition from DCT to DGT, no information has been received.		
New Pier (Pier 1)	1 645	11 518	↓5%
Cape Town Container Terminal	1 910	13 373	↑10%
Ngqura Container Terminal	1 922	13 451	↓4%
Port Elizabeth Container Terminal	366	2 561	↑195%
Other	997	6 976	↑66%
Total	6 840	47 878	↑11%

Source: Calculated from TPT, 2026. Updated 11/01/2026.

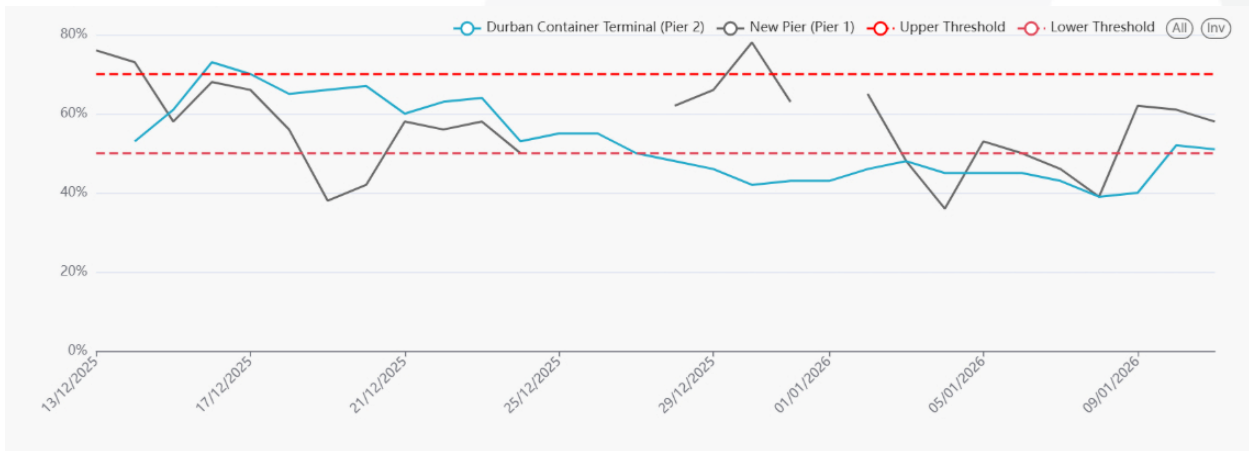
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2026, and updated 11/01/2026.

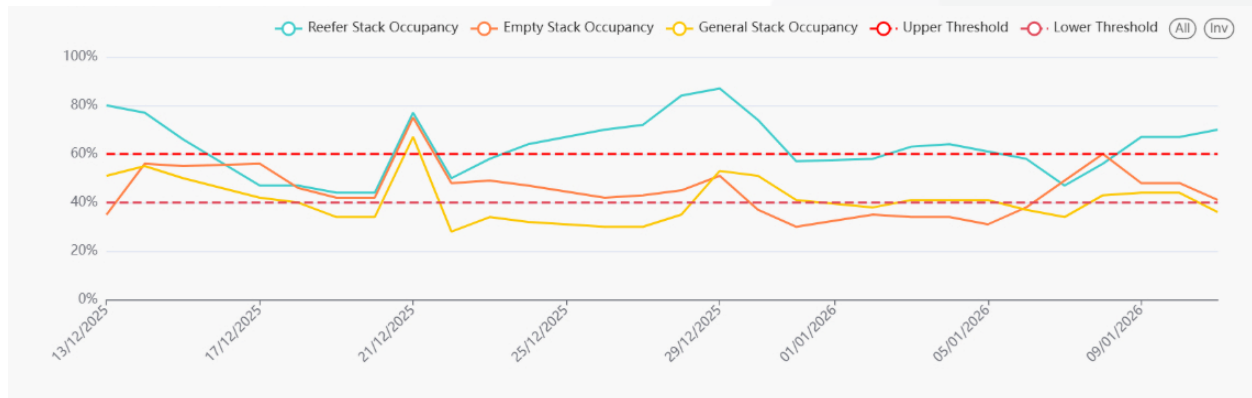
Figure 4 – Stack occupancy in DCT, general-purpose containers (13 December to present; day on the day)



Source: Calculated using data from Transnet, 2026, and updated 11/01/2026.

The following figure shows daily stack occupancy in Cape Town over a similar period.

Figure 5 – Stack occupancy in CTCT, GP, reefer, and empty stack (13 December to present, day on day)



Source: Calculated using data from Transnet, 2026, and updated 11/01/2026.

b. TNPA: December update

TNPA has released consolidated port statistics for December⁷, with the full year-to-date figures showing that:

- Container throughput in 2025 totalled **4,473 million TEUs**, which is up by **↑3,2%** (y/y) on 2024.
- Total bulk cargo in 2025 totalled **221 million tonnes**, which is up by **↑4,4%** (y/y) on 2024.
- Vehicle throughput in 2025 totalled **899,094 units**, which is up by **↑15%** (y/y) on 2024.

All sectors indicate growth, which reaffirms the positive initiatives and greater collaboration throughout the maritime economy. However, when only looking at the throughput of full containers, the change in 2024 comes to **↓0,4%** (y/y), which speaks more to the lacklustre economy than to containerised operations. Therefore, for both the economy and port operations, there is a need to drive past these numbers and surpass the previous records of 2018 (which is **4,8 million TEUs**). Our forecasts predict a calendar throughput of **between 4,57 and 4,75 million TEUs** for 2026.

Considering the specific figures for December, the headline figures indicate that:

- Container throughput in December decreased by **↓4%** (m/m), but increased annually by **↑9%** (y/y).
- Total bulk cargo decreased monthly by **↓1%** (m/m) and annually by **↓2%** (y/y).
- Vehicles decreased monthly by **↓10%** (m/m), but increased annually by **↑19%** (y/y).

These figures are mostly cyclical (December typically sees a significant reduction). Therefore, the best indication of progress is by comparing with yearly statistics (see below). Nevertheless, the following table shows the respective changes versus November:

Table 4 – TNPA – Monthly volume and growth: December 2025

	Nov	Dec	Movement	% change
Containers (TEUs)	365 764	349 999	-15 765	-4%
Landed	194 810	187 185	-7 625	-4%
Shipped	170 954	162 814	-8 140	-5%
Dry bulk (MT)	15 240 344	14 989 512	-250 832	-2%

⁷ Transnet. 2025. [Port statistics](#).

Liquid bulk (MT)	2 840 929	3 091 413	250 484	9%
Breakbulk (MT)	616 822	509 186	-107 636	-17%
Vehicles (Units)	94 213	84 443	-9 770	-10%
Total cargo (excl. Vehicles)	18 698 095	18 590 111	-107 984	-1%

Source: [TNPA](#), updated 11/01/2026.

Transnet Port Terminals handled **350 thousand containers** and **15 million metric tonnes of bulk cargo** during December, which is significantly below the record throughput of last month. Vehicle throughput also decreased, coming in at **84,443 units**. Compared to yearly trends, the movement is much more aligned cyclically with containers, with gains especially in containers imported (**↑20%**) – but losses in bulk cargoes (**↓2%**), as evidenced by the following table:

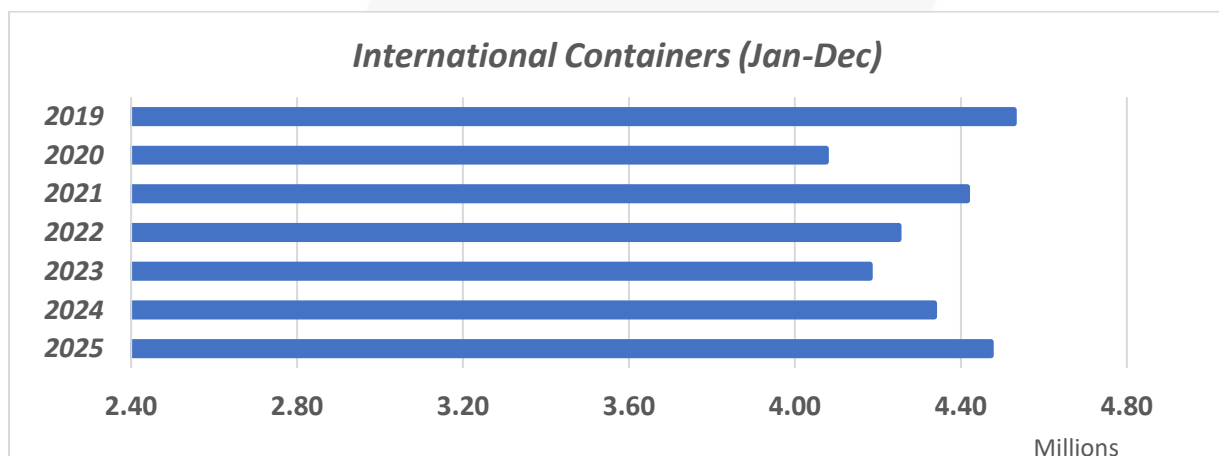
Table 5 – TNPA – Cyclical volume and growth: December 2019, 2024, and 2025

	2019	2024	2025	% 19-'25	% '24-'25
Containers (TEUs)	331 914	320 837	349 999	5%	9%
Landed	162 642	155 724	187 185	15%	20%
Shipped	169 272	165 113	162 814	-4%	-1%
Dry bulk (MT)	15 453 687	15 509 485	14 989 512	-3%	-3%
Liquid bulk (MT)	3 005 963	2 852 975	3 091 413	3%	8%
Breakbulk (MT)	461 701	520 537	509 186	10%	-2%
Vehicles (Units)	57 828	71 236	84 443	46%	19%
Total cargo (excl. Vehicles)	18 921 351	18 882 997	18 590 111	-2%	-2%

Source: [TNPA](#), updated 11/01/2026.

Containers shipped (**↓1%**, y/y), dry bulk (**↓3%**) and breakbulk (**↓2%**) are down annually; whereas containers landed (**↑20%**), liquid bulk (**↑8%**) and vehicle throughput (**↑19%**) have increased compared to December 2024. As mentioned above, when reading the cyclical figures with the year-to-date figures (also note *Figure 2*), the positive trend continues, as South Africa's bulk cargoes are up by **↑4,4% YTD**. However, despite the improved cyclical numbers, YTD port volumes remain down by **↓6,6%** versus 2019. For containers, the YTD has improved to **↑3,2%**, after being down by **↓4,2%** just six months ago in June, as illustrated by the following year-to-date for containers to December:

Figure 6 – Year-to-date flows 2019-2025: containers, y/y (TEU millions)



Source: [TNPA](#), updated 11/01/2026.

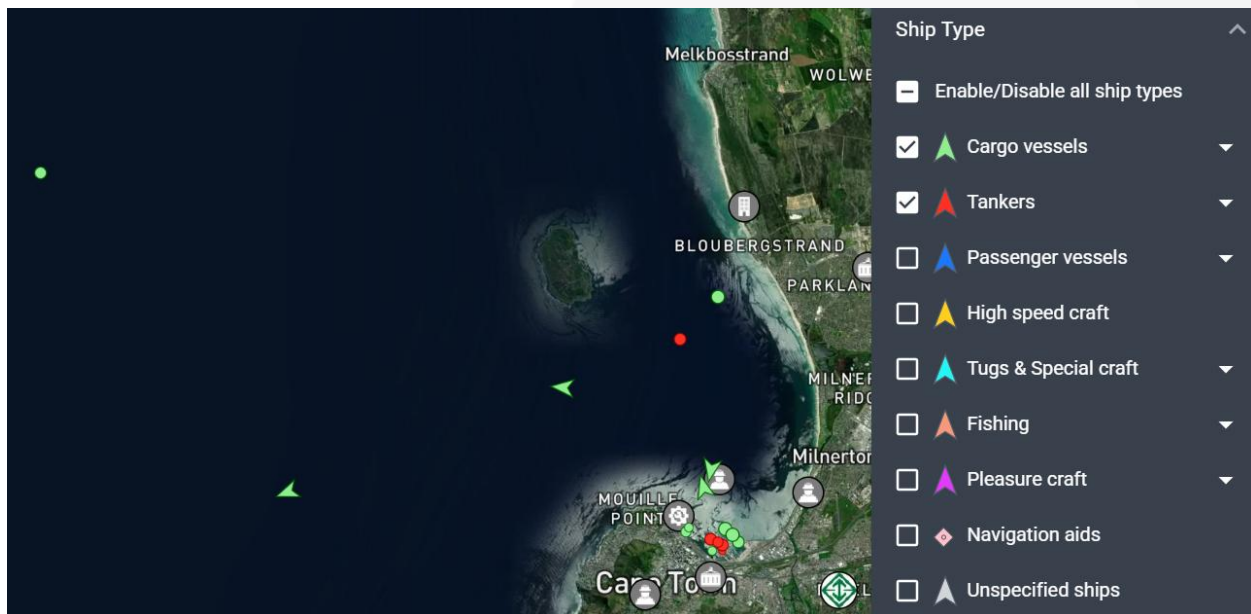
Ultimately, as illustrated, the final figure of **4,473 million TEUs** shows that the system has improved in recent years, with the main drivers being **(1)** new equipment, **(2)** improved processes across the marine, the quayside, and the landside, and **(3)** improved collaboration across the industry. While essential milestones have been achieved, sustained growth will hinge on continued institutional reform, improved system-wide coordination, and the capacity to raise throughput and reliability to — and beyond — pre-pandemic levels.

c. Summary of port operations

i. Cape Town

Cape Town Container Terminal started the year with significant weather challenges, reporting around 84 hours (over 3 days in total) of non-operational hours for the year, 11 days into the year. Though the terminal had a total of six vessels at anchorage in the last week, towards the end of the week, the numbers have reduced significantly. Though the terminal has started catching up, the delays have had a significant impact on exports, particularly the fresh produce industry, which requires a faster-paced process to ensure its produce reaches international markets within a strict timeframe.

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



Source: Marine Traffic. Updated 11/01/2026 at 14:00.

ii. Durban

Pier 1 suffered a knock-on effect from the congestion of the Western and Eastern Cape container terminals, with the vessels scheduled for Pier 1 being delayed at other terminals, leading to no vessels at berth or at anchorage. The terminal has advised that they will be using this time to get some much-needed maintenance done to the cranes, aiming to increase the operational cranes from the current average of four to five out of seven. The **TTT** for the week averaged **~40 minutes (↓38%, w/w)**, and the average **staging time** was **~21 minutes (↓16%)**.

The 25-year Transnet–ICTSI joint venture to operate and further develop Durban Container Terminal Pier Two commenced this week, marking a significant milestone in South Africa’s port reform agenda and Transnet’s strategy to crowd in private sector participation in strategic operations. The partnership is expected to raise DCT2’s container handling capacity from **2,0 to 2,8 million TEUs** through new equipment

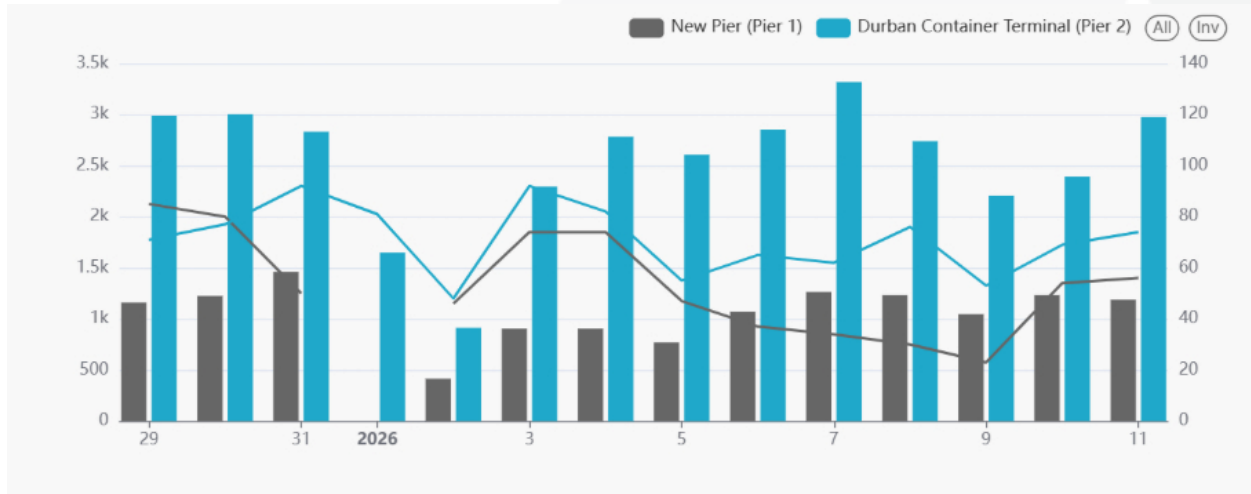
and advanced technology, while materially improving operational performance, including crane productivity and ship working hours. The terminal has shown little to no vessels at anchorage, with an average of two to three vessels on berth, and a complement of around 10 out of 15 cranes available throughout the past week. The TTT for the week averaged **~67 minutes (↓8%, w/w)**, and the average staging time was **~51 minutes (↑59%)**.

Durban’s MPT terminal has been plagued with crane breakdowns, working with only one or two of the four Mobile Harbour Cranes over the past week. The impact on operations, however, was not significant, as the terminal had very low berth occupancy rates, with only one vessel at berth by the end of the week.

The Ro-Ro terminal in Durban has reported exceptional performance over the past year, with the terminal hitting its budgeted volumes early in the new year, with time to spare. Over the past week, the terminal has reported no vessels at anchorage and continued outperforming targeted volumes on waterside as well as landside.

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

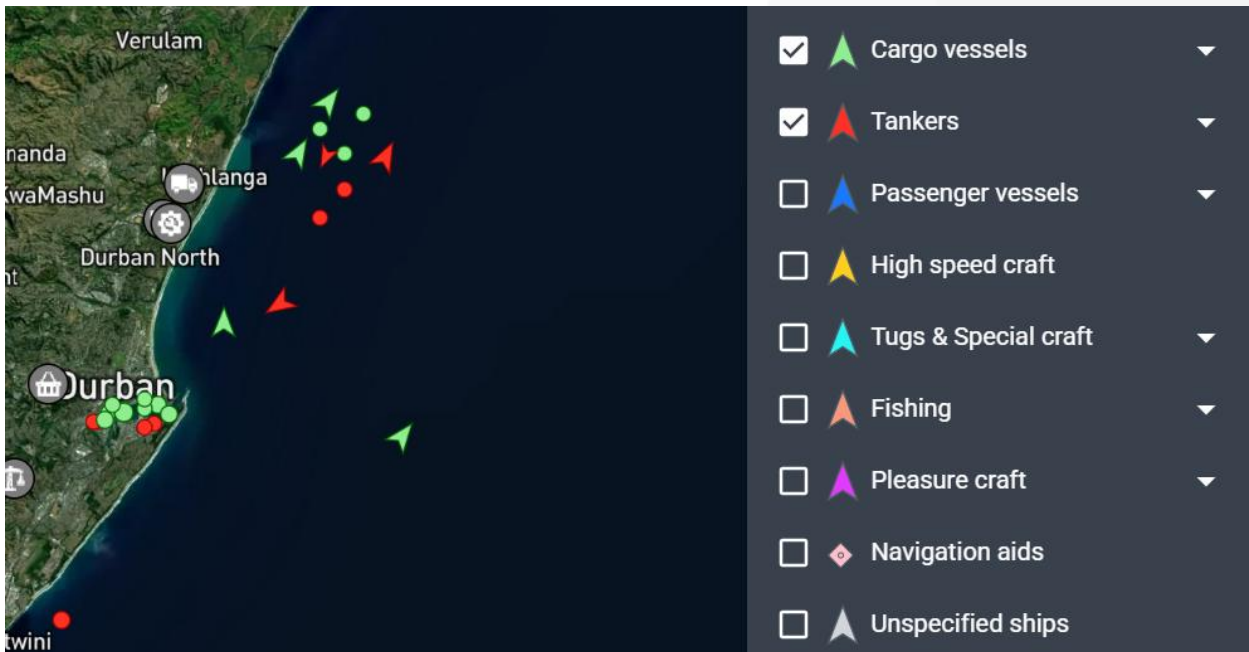
Figure 8 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2026, and updated 11/01/2026.

The queue of container vessels waiting outside Durban decreased this week. On Monday evening (12 January), **no** container vessels were waiting outside at anchorage for either Pier 1, Pier 2, or Point. The queue of dry (**two**), liquid (**two**), and breakbulk (**two**) vessels, on the other hand, was stable compared to last week. The following snapshot shows the current status quo:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 11/01/2026 at 14:00.

iii. Richards Bay

The daily average coal throughput for the week decreased significantly (far a great end of/start to the year) and averaged around **127,000 tons** (↓42%, w/w) a day. An average of **24 trains** was serviced on the landside (up by **two** from last week), and slightly above the target (of 22 trains).

iv. Eastern Cape ports

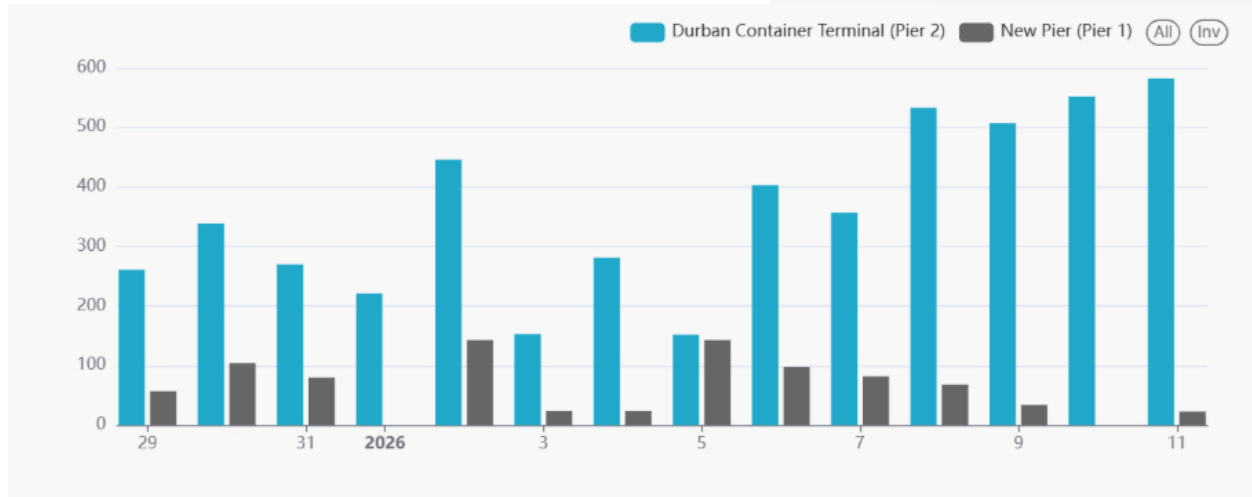
NCT reported significant weather delays over the first two weeks of the year, with NCT having up to five vessels at anchorage (both at anchorage and outer port limits). However, the terminal had a steady stream of equipment availability, with seven out of eight cranes available and 24 to 26 out of 30 RTGs available throughout the week.

PECT, though plagued by similar weather disruptions, there was a constant supply of equipment with three out of three cranes (two STS and one MHC) and 11 out of 11 straddle carriers available to support operations. The terminal indicated that they will be taking out one of the STS cranes for planned maintenance from 19 January to 31 March.

v. Transnet Freight Rail (TFR)

In the first few weeks of the year, rail feedback channels have reported that the majority of rail lines are fully operational. The exception to this is the line between City Deep and Mafikeng, which is experiencing challenges due to locomotive breakdowns.

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



Source: Calculated using data from Transnet, 2025. Updated 11/01/2026.

In the last week (5 to 11 January), rail cargo on the ConCor line out of Durban was reported at **3,872** containers, up by **↑63%** from the previous week’s **2,380** containers.

vi. AGOA update

At the start of 2026, South Africa welcomed the approval of the AGOA Extension Bill by the US House of Representatives, which proposes a three-year reauthorization of AGOA until 2028 and now proceeds to the Senate, offering short-term relief and renewed certainty for firms amid heightened US tariff pressures. While shorter than the long-term renewal sought by beneficiaries, the extension supports bilateral trade, complements AfCFTA objectives, and sustains regional value chains and US supply chains reliant on AGOA-linked imports. The decision reinforces the strategic SA–US trade relationship—worth **\$15 billion in 2024**, with South Africa running a surplus—and underpins continued engagement on reciprocal tariff arrangements to address trade barriers and deepen investment ties.

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 (29 December to 4 January). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in December 2024 averaged **~833,599 kg**.

Table 6 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	294 381	2 060 664	↓33%
Volume outbound	230 406	1 612 840	↓20%
Total	524 786	3 673 504	↓28%

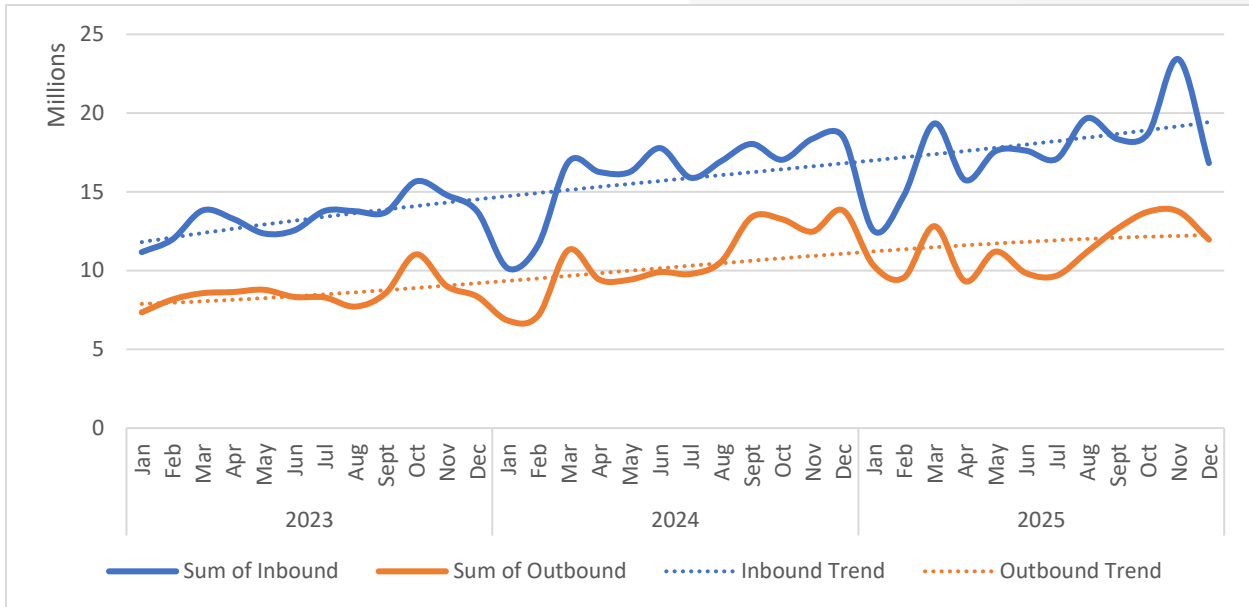
Courtesy of ACOC. Updated: 11/01/2026.

International air cargo to South Africa was significantly reduced this week. The daily average of air cargo handled amounted to **~294,381 kg** inbound (**↓33%**, w/w) and **~230,406 kg** outbound (**↓20%**). Consequently, because of the reduction, the current levels are significantly below last year’s level (**~↓37%**)

and the comparative levels of pre-pandemic 2019 (~↓35%), as volumes across the New Year period in January typically reduce significantly. Despite the slowdown towards the end of the year, total air freight to and from ORTIA in 2025 totalled **350 million kilograms**, which is up by **↑0,7%** (y/y) on the 2024 total year-to-date air freight.

The following figure shows the international air cargo flows to and from all terminals since the start of 2023:

Figure 11 – International cargo for OR Tambo – volumes per month (kg millions)

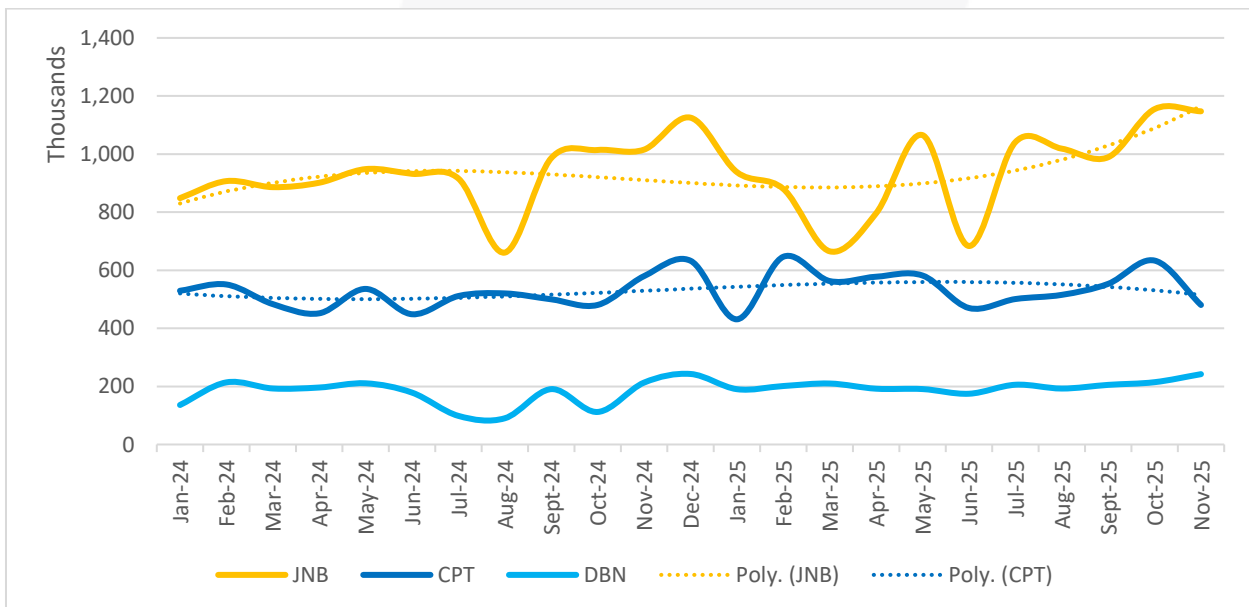


Calculated from ACOC. Updated: 11/01/2026.

b. Domestic air cargo

The following figure shows the movement since the start of last year:

Figure 12 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 11/01/2026.

3. Road and Regional Update

a. Lebombo border post update

In the last week (5 to 11 January), movements increased substantially for road transport – recovering from the Festive Season, while reporting for rail transport was sparse.

- Truck volumes through the border post increased to around **1,300 HGVs per day** (↑20%, w/w).
- Queue times were stable at an average of **~2,8 hours** at the border.
- The average processing time decreased to an average of **~2,5 hours** per crossing.

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

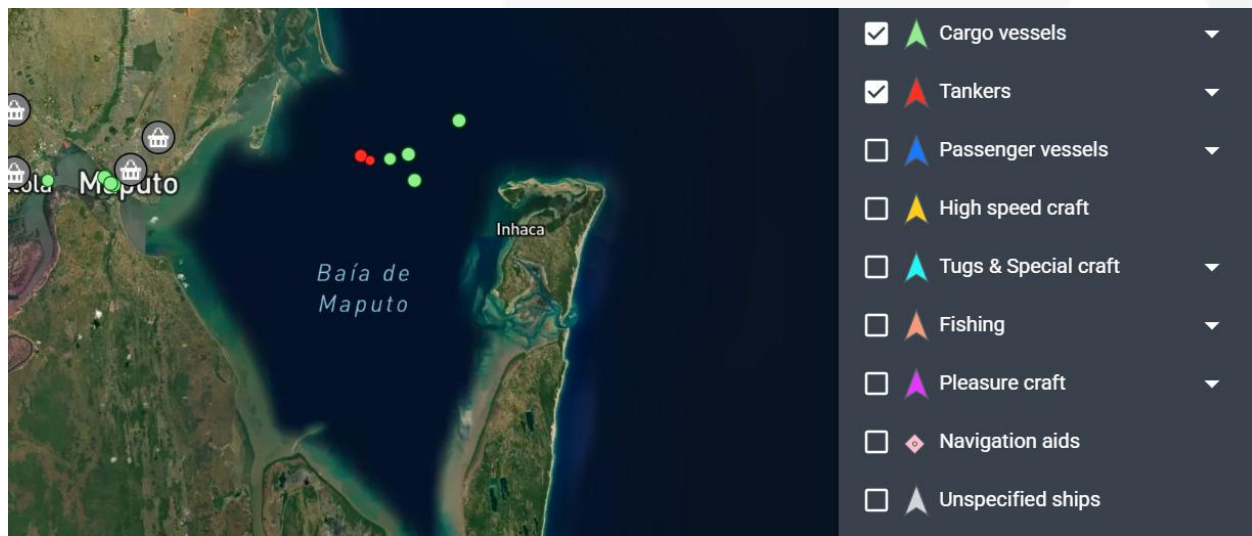
Table 7 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo
Average	1 300	1 228	987	159	46	53	37	173	0	n/a	1	n/a
% (w/w)	20%	19%	13%	42%	39%	47%	75%	11%	33%	n/a	-167%	n/a

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 11/01/2026.

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 11/01/2026 at 14:00.

b. SADC cross-border and road freight update

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

- Overall, the average queue time was unchanged from last week, while transit time decreased by about **20 minutes**.
- The median border crossing times at South African borders decreased by more than **four hours**, averaging **~8,4 hrs** (↓33%) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was essentially unchanged, averaging **~5,2 hrs**.

1. Zambia — toll fee increases and new toll infrastructure:

- a. The **National Road Fund Agency (NRFA) in Zambia** has **increased toll fees** on all NRFA toll plazas, as well as on the Tre toll plaza on the **Lusaka–Ndola road**.
- b. The toll increases **apply to Medium, Heavy, and Abnormal Goods Vehicles** only, indicating a targeted policy affecting commercial freight operations.
- c. Figures indicate toll fees have risen from **\$60 to \$90** for the affected categories.
- d. A **new toll gate is planned near Mazabuka**, though details on timing, design or tariff structure are pending further notification.
- e. Stakeholder engagement is in motion, led by FESARTA, with the stated intention to **intervene on behalf of transporters** regarding the fee increase.

2. Botswana/South Africa border — Groblersbrug planning:

- a. **Botswana Motorists’ Association (BMA)** reports **plans to relocate the Groblersbrug border** facility in response to heightened traffic volumes.
- b. The increased traffic is attributed to transporters **preferring the Botswana route**, likely in pursuit of operational efficiencies or congestion avoidance on alternative corridors.
- c. As part of this strategic adjustment, a **new freight-dedicated bridge** is proposed to mitigate congestion; however, specifics on **location, timeline, and implementation strategy** remain undefined at this stage.

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

Table 8 – Delays⁸ summary – South African borders⁹ (both directions)

Border Post	Direction	HGV ¹⁰ 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	266	22,7	6,5	29,0	7 980	1 862
Beitbridge	Zimbabwe-SA	199	14,8	2,4	13,1	5 970	1 393
Groblersbrug	SA-Botswana	168	13,2	2,5	20,6	5 040	1 176
Martin’s Drift	Botswana-SA	153	2,3	0,3	1,4	4 590	1 071
Kopfontein	SA-Botswana	80	5,5	1,1	5,3	2 400	560
Tlokweng	Botswana-SA	22	0,7	0,2	0,4	660	154
Vioolsdrift	SA-Namibia	30	3,6	1,3	4,1	900	210
Noordoewer	Namibia-SA	20	1,0	1,0	2,1	600	140
Nakop	SA-Namibia	30	1,7	0,5	1,5	900	210
Ariamsvlei	Namibia-SA	20	0,9	0,4	0,6	600	140
Skilpadshek	SA-Botswana	116	3,3	1,4	3,2	3 480	812
Pioneer Gate	Botswana-SA	25	0,0	0,0	0,0	750	175
Ramatlhabama	SA-Botswana	70	1,3	0,3	1,2	870	203
Ramatlhabama	Botswana-SA	29	0,6	0,2	0,3	2 100	490
Lebombo	SA-Mozambique	982	2,8	0,5	2,5	29 460	6 874
Ressano Garcia	Mozambique-SA	908	1,3	0,2	1,2	27 240	6 356
Sum/Average		3 118	4,7	1,2	5,4	93 540	21 826

Source: TLC, FESARTA, & Crickmay, week ending 04/01/2026.

⁸ 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.

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

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

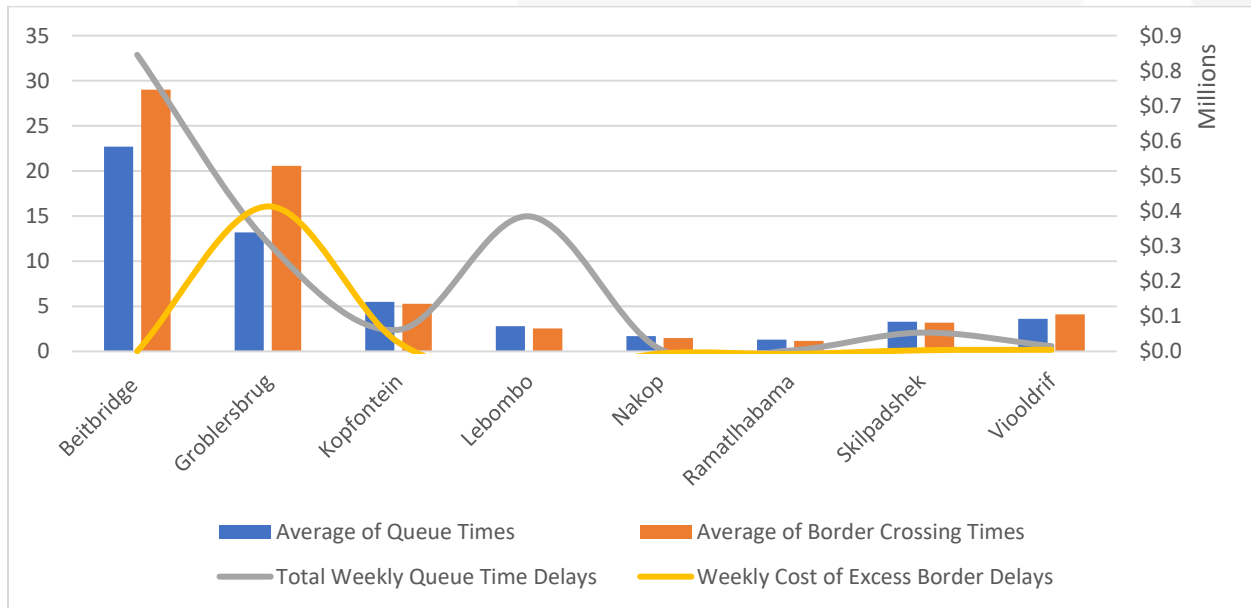
Table 9 – Delays summary – Corridor perspective

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	11,8	2,9	11,5	9 600	2 240
Central Corridor	798	1,9	0,0	1,9	23 940	5 586
Dar Es Salaam Corridor	1 819	13,9	2,3	14,1	54 570	12 733
Maputo Corridor	1 890	2,1	0,4	1,9	56 700	13 230
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	2 743	10,5	1,9	12,4	82 290	19 201
Northern Corridor	2 817	0,2	0,1	0,2	92 520	21 588
Trans Caprivi Corridor	372	1,8	0,5	1,6	11 160	2 604
Trans Cunene Corridor	100	1,8	0,8	2,1	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700
Trans Oranje Corridor	116	21,6	2,7	21,6	3 480	812
Sum/Average	11 202	5,2	0,9	5,6	344 070	80 283

Source: TLC, FESARTA, & Crickmay, week ending 04/01/2026.

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

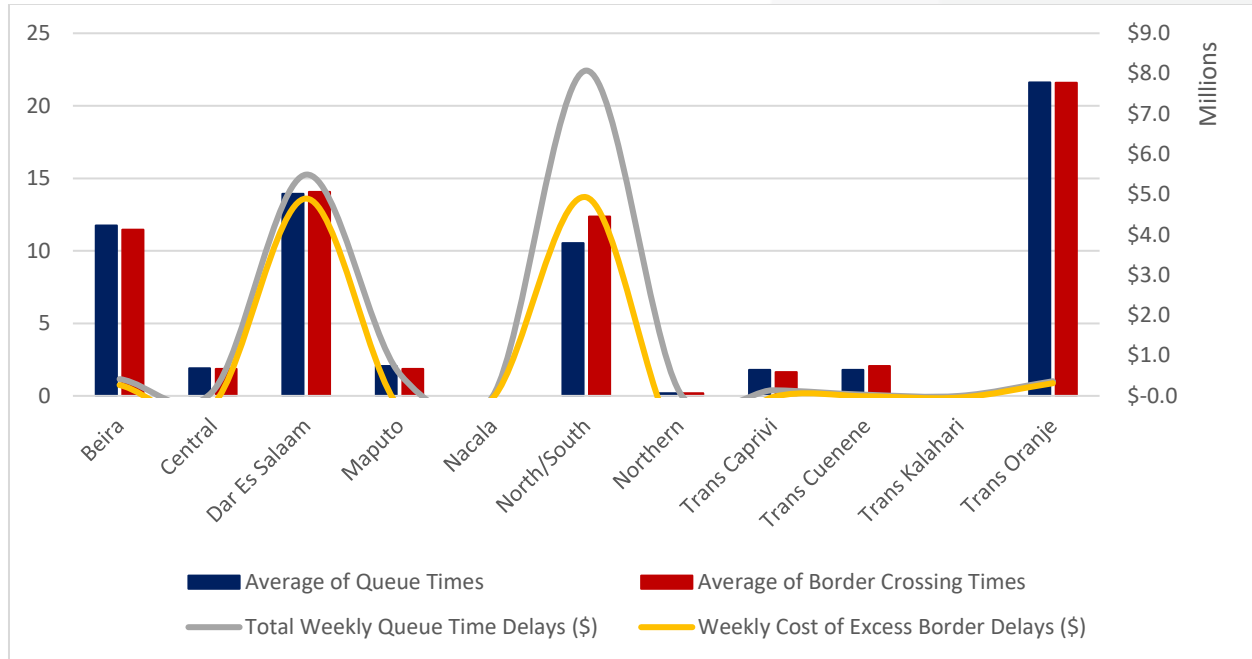
Figure 14 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 04/01/2026.

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: TLC, FESARTA, & Crickmay, week ending 04/01/2026.

In summary, cross-border queue time averaged **~5,2 hours** (unchanged from the previous week's **~5,2 hours**), indirectly costing the transport industry an estimated **\$15,3 million (R252 million)**. Furthermore, the week's average cross-border transit times also hovered around **~5,6 hours** (down by **~0,4 hours** from the **~6,1 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$8,6 million (R141 million)**. The total indirect cost for the week amounts to an estimated **~\$23,8 million (R392 million)**, down by **↓2,7%** from the **~R403 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

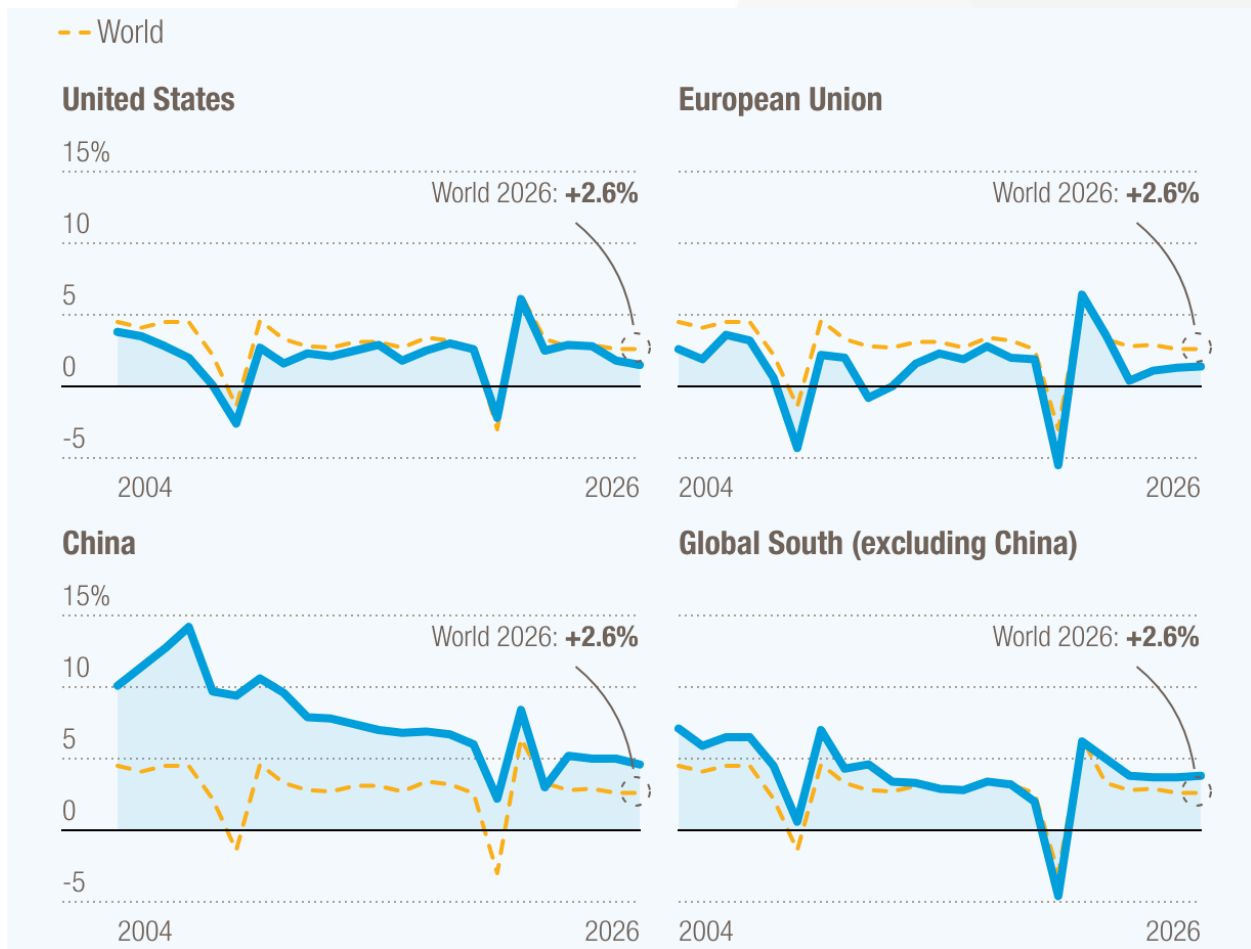
Global trade and economic activity enter 2026 against a backdrop of slower growth, policy uncertainty, and structural realignment. According to UNCTAD's *Global Trade Update*, the trade momentum that delivered a strong performance in 2025 is expected to moderate in 2026 as headwinds from slowing global growth, geopolitical fragmentation, and tighter national regulations take effect. Global output is projected to grow at around **2,6–2,7% in 2026**, marginally below 2025 and below the pre-pandemic trend, with investment remaining subdued across most regions.

A range of systemic shifts is redefining global commerce. Rising protectionism — evidenced by increased tariff use — and reconfigured value chains are reshaping trade flows and rising policy uncertainty, particularly for developing and less diversified economies. Simultaneously, new structural dynamics — such as the expanding share of digitally deliverable services, a surge in South–South trade, and tighter environmental and technical regulations — are creating opportunities alongside risks.

Investment decisions in 2026 will therefore be influenced not only by traditional demand drivers but also by regulatory, environmental, and geopolitical factors. Strategic emphasis on diversification, regional

integration, and resilience in global value chains will be critical for sustaining trade expansion amid persistent uncertainty.

Figure 16 – Real gross domestic product (GDP) growth, world and selected economies (2004-2026)



Source: [UNCTAD](http://unctad.org)

b. Global shipping industry

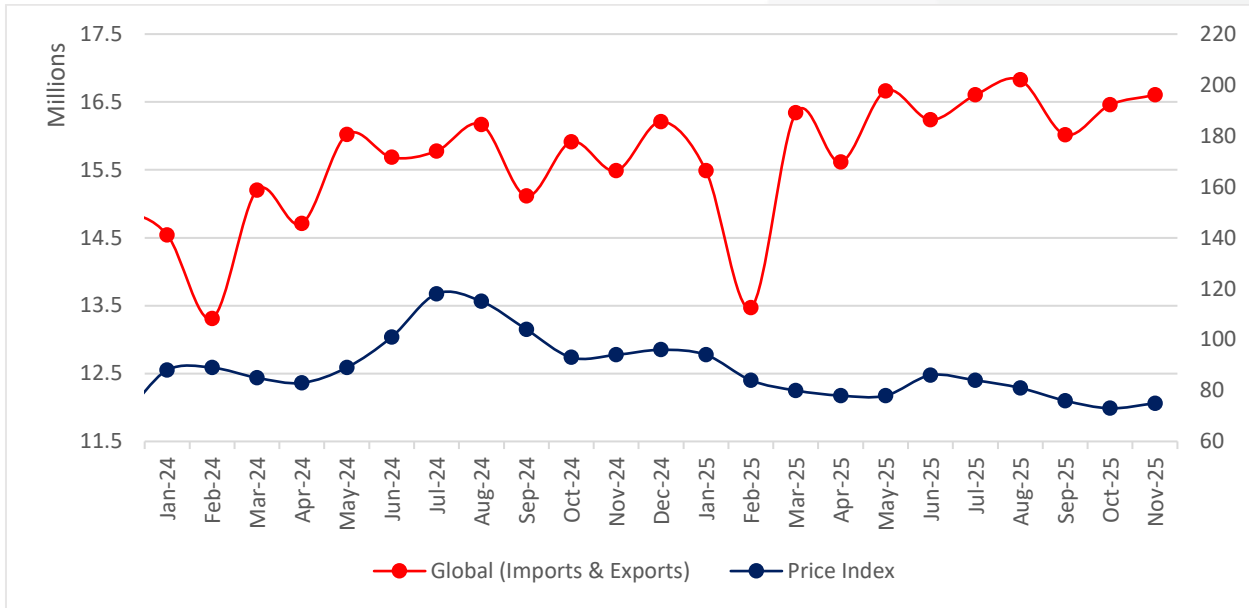
i. Global container trade statistics for October

The latest container throughput figures from *Container Trade Statistics* (CTS) show that container volume increased slightly in November, but is significantly up versus the corresponding period last year. Consequently, in brief, the peak season did not materialise (as expected), although throughput for the year exceeded expectations. The total throughput is up by **↑0,9%** monthly and up by **↑7,2%** (y/y) annually. Regionally, it was a mix, as some trade lanes experienced increases in November, notably Sub-Saharan imports at **↑8,4%** and European imports at **↑7,0%**, respectively. On the other hand, the most significant decreases were with Sub-Saharan exports – down by **↓6,9%** versus October.

After four months of decreases, the global price index (dry and reefer combined) increased in November by **↑2,7%** monthly – but remains significantly down by **↓20%** yearly.

Collectively, the following figure illustrates the global container throughput and price index since the start of 2024:

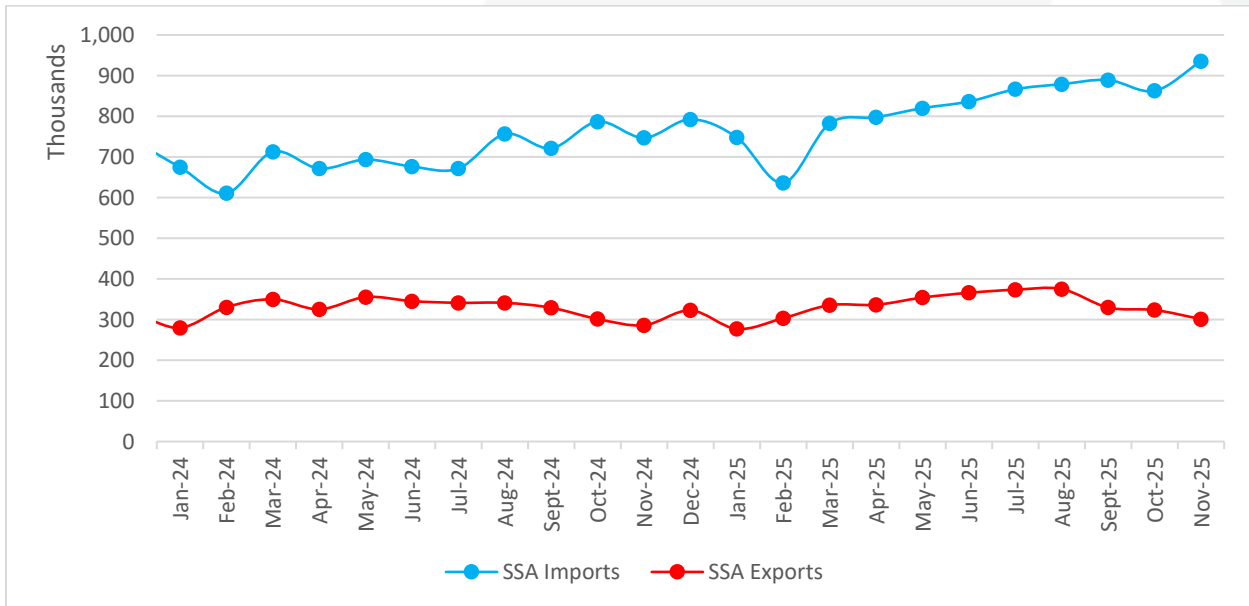
Figure 17 – Global Containerised Throughput (TEUs) and price index



Source: Calculated from [CTS](#)

Throughput in October reached **16,6 million TEUs** – some **220 thousand containers** below the record level achieved last in August this year. The following figure shows Sub-Saharan African trade over the same period:

Figure 18 – Sub-Saharan Africa Containerised Throughput (TEUs)



Source: Calculated from [CTS](#)

SSA imports and exports went in divergent directions in November. Annually, SSA imports remain significantly up (**↑25%, y/y**) – with exports up by **↑5,3% (y/y)**.

ii. Container industry summary and 2026 start

The global container shipping industry in early 2026 continues to navigate a complex mix of supply–demand imbalances, route shifts, and rate volatility. Spot freight rates have shown a pre-Chinese New Year bounce

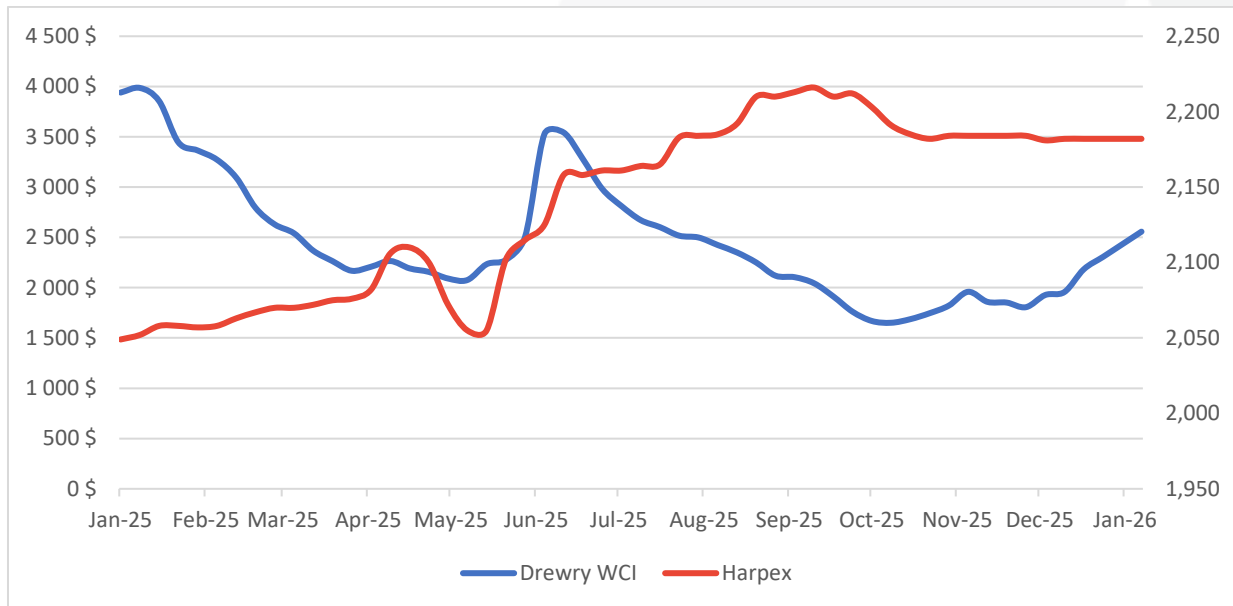
on major ex-Asia trades, though carriers and shippers remain cautious amid weak overall demand. Structural overcapacity persists, with fleet growth outpacing projected cargo growth and exerting downward pressure on rates, particularly across Asia–Europe and transpacific corridors.

A noteworthy operational shift is the gradual return of vessels through the Suez Canal/Red Sea after prolonged rerouting around the Cape of Good Hope; weekly Suez transits recently rose, reflecting tentative confidence in regional security. However, major lines are still watching risk conditions before full reinstatement of services. Emerging opportunities are seen on secondary trade lanes (e.g., Latin America–Africa) and targeted capacity increases on African trades, even as winter weather has triggered delays and congestion at Northern Hemisphere ports.

iii. Global freight rates and carrier profits

Global freight rates increased significantly over the Festive Period, with the “World Container Index” (WCI) up by **↑17,2%** (or **\$375**) between the last measurement of 2025 and the first of 2026. Therefore, the index is now trading at **\$2 557 per 40-ft container**.¹¹ Elsewhere, the charter market remains stable, with the *Harpex Index* trading at **2,182 points**.¹² The following shows the respective indices since the start of 2025:

Figure 19 – World Container Index (WCI) & Harpex Charter Index



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

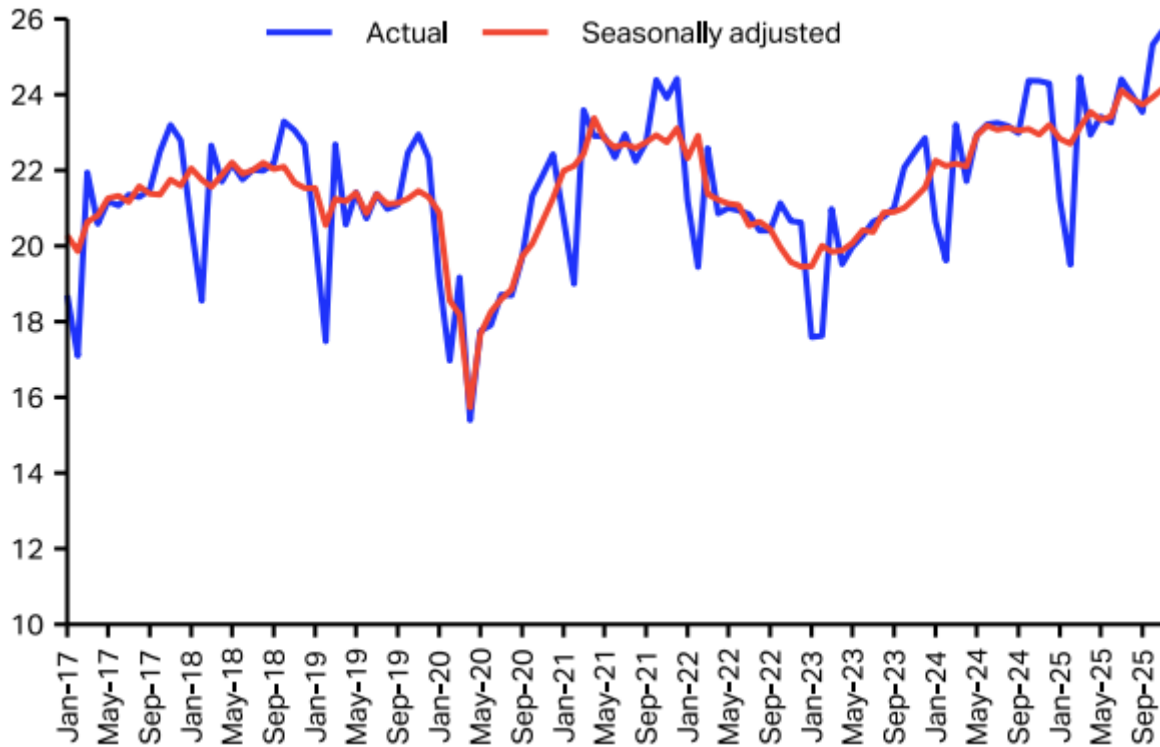
c. Global air cargo industry

The latest IATA “Air Cargo Market Analysis” for November reports that global air cargo demand, measured in Cargo Tonne-Kilometres (CTKs), rose **↑5,5%** (y/y) in November 2025, driven by strong activity in emerging markets and peak-season shipments, with international CTKs up about **↑6,9%**. Available capacity (ACTK) expanded by **↑4,7%** (y/y), resulting in a modestly improved cargo load factor (**~49,1%**), indicating demand slightly outpaced capacity growth. Regional variations were pronounced: Africa and Asia-Pacific posted

¹¹ Drewry. 08/01/2026. [World Container Index](#).
¹² Harpex. 09/01/2026. [Harper Petersen Charter Rates Index](#).

double-digit CTK gains, whereas the Americas lagged. Broader trade indicators suggest resilient, if uneven, global freight momentum.

Figure 20 – Industry CTKs, billion



Source: [IATA](#)

According to high-frequency metrics from World ACD, worldwide air cargo volumes remained resilient into late December and early January, with December closing at **↑7%** (y/y) growth in chargeable weight, lifting full-year 2025 tonnages to a new record despite softer pricing conditions.

Figure 21 – Capacity, chargeable weight, and rates (past two to five weeks)

Origin Regions
last 2 to 5 weeks



Origin Regions	Capacity ¹			Chargeable weight ¹			Rate ¹		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-4%	+6%		-22%	+0%		+0%	+7%
Asia Pacific		-9%	-1%		-25%	+6%		-8%	-3%
C. & S. America		-9%	+4%		-30%	+10%		-1%	-4%
Europe		-10%	+4%		-44%	-3%		-7%	-1%
M. East & S. Asia		-4%	+4%		-14%	+10%		-5%	-17%
North America		-10%	-4%		-37%	+2%		-4%	-6%
Worldwide		-9%	+0%		-30%	+4%		-5%	-3%

Source: [World ACD](#)

In the final two weeks of the year, capacity contracted sharply (**↓9%**, 2w/2w) in line with seasonal adjustments, while chargeable weight fell more steeply (**↓30%**) and average rates eased (**↓5%**), mirroring patterns observed a year earlier. Regionally, Asia-Pacific continued to outperform, supported by strong

outbound demand and relatively constrained capacity, while global rates remained broadly stable but slightly lower than end-2024 levels

In other aviation news, severe winter weather across parts of Europe disrupted air cargo operations over the year-end period, with snow and ice causing airport closures, flight cancellations, and knock-on delays across major hubs. The impact was most pronounced on time-sensitive and high-value cargo, as capacity constraints and network congestion compounded existing peak-season pressures.

ENDS ¹³

¹³**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.*