



Date: 15 February 2026

Key Notes

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

i. Port operations - General

- At our container terminals, an average of **6,523 TEUs** was handled daily, a decrease from **7,864 TEUs** the previous week.
 - For the coming week, an increased average of **~7,165 TEUs (↑10%)** is predicted to be handled.
- Weather delays continued to plague the Eastern Cape, and especially the Western Cape.
- Additional system-related delays were incurred with the CTCT experiencing not only wind stoppages, but downtime due to power outages and system challenges, and NCT experienced delays relating to the newly implemented booking system.

ii. TNPA: January update

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

- Container throughput totalled **353,825 TEUs**, which is up by **↑1%** (m/m) and **↑6%** (y/y).
- Total bulk cargo totalled **23,8 million tonnes**, which is up by **↑28%** (m/m) and **↑27%** (y/y).
- Vehicle throughput totalled **67,761 units**, which is down by **↓20%** (m/m), but up by **↑27%** (y/y).
- A record number of iron ore was exported out of the Port of Saldanha in January (with some **9,3 million metric tonnes** of total dry bulk cargo exported out of the port), which is the highest since June 2018.
- Elsewhere, vehicle throughput decreased slightly, coming in at **67,761 units**. Looking at the cyclical figures.
- Compared to yearly trends, gains are evident across several sub-sectors, with dry bulk (**↑36%**) and vehicles (**↑27%**) leading the way.
 - The only contractions are with breakbulk (**↓12%**) and liquid bulk (**↓6%**). All in all, the figures are overwhelmingly positive.
 - For 2026, our internal forecasts demonstrate that South Africa can confidently achieve growth rates of between **↑2,5%** to **↑4,2%** for the year.

iii. Post operations – Performance Metrics

- CTCT handled an average of **~1 426 TEUs (↓34%, w/w)** containers a day, with an average of **~1 910 (↑34%)** projected this week.
 - According to Linerlytica, the current *queue-to-berth ratio* at the port is **1,00**.
 - In spite of the challenges, the terminal had an average of 8 out of 9 cranes and 29 out of 32 RTGs available.
- DCT Pier 1 handled **~1 824 TEUs (↓19%, w/w)** containers a day, with an average of **~1 897 (↓4%)** projected this week.
 - The **TTT** at Pier 1 for the week averaged **~51 minutes (↑21%, w/w)**, and the average **staging time** was **~37 minutes (↑68%)**.
 - The terminal had an average of four out of seven cranes and 16 out of 25 RTGs available.



- The queue of container vessels waiting outside Durban was stable this week.
 - On Wednesday afternoon (18 February), **one** container vessel was waiting outside at anchorage for Point.
 - The queue of dry (**three**), liquid (**one**), and breakbulk (**one**) vessels slightly decreased from last week.
- South Africa's other container terminals produced the following results for the week at all other terminals:
 - Ngqura Container Terminal handled an average of **~1 953 TEUs** (**↓26%**, w/w) containers a day, with an average of **~1 945 TEUs** (**↓0,4%**) projected this week.
 - Port Elizabeth Container Terminal handled an average of **~133 TEUs** (**↑453%**) containers a day, with an average of **~366 TEUs** (**↑171%**, w/w) projected this week.
 - Other terminals handled a combined average of **~1 187 TEUs** (**↑44%**, w/w), with an average of **~1 047 TEUs** (**↓12%**) projected this week.
- At RBCT, the daily average coal throughput for the week increased after the lower volumes posted last week and averaged around **188,000 tons** (**↑21%**, w/w) a day.
 - An average of **22 trains** was serviced on the landside (slightly higher than last week's 19), and slightly on par with the target (of 22 trains).
- In the last week (9 to 15 February), rail cargo on the ConCor line out of Durban was reported at **2,938** (excluding 14/15 February for DGT) containers, up by **↑24%** from the previous week's **2,371** containers.

iv. **Lebombo border post update**

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

Some updates concern the processing pilot:

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

v. **SADC cross-border road freight update**

- For January overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts increased by **↑0,5%** (m/m), driven primarily by the slight upturn after the Festive Season of December (**↓12%** down on November).



- Northbound traffic (Eastbound for Lebombo) decreased across the board – except through Lebombo, with the total reductions evident at **Kopfontein (↓17%)**, **Beitbridge (↓14%)** and **Grobblersbrug (↓14%)**. Lebombo’s overall total increased by **↑11%**.
- For the week, the average queue time decreased by **an hour** from last week, while transit time decreased by nearly **an hour**.
- The median border crossing times at South African borders, on the other hand, increased by approximately **half an hour** on average, averaging **~8,9 hrs (↑6%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased by nearly **an hour**, averaging **~4,4 hrs (↓17%)**.

1. DRC corridor security:

- a. FESARTA has established contact with a private security agency in the DRC to provide escorts for copper trucks and support with broader security risks, representing a constructive step toward improving safety and predictability along critical mining export corridors.

2. Zimbabwe border delays (ZIMRA payments):

- a. A new ZIMRA payment confirmation system – intended to reflect duty payments within 30 minutes in ASYCUDA World – is currently experiencing delays of 24 hours or more.
- b. Combined with exchange rate–driven duty top-ups, this has materially slowed border processing, with reports of trucks taking over a week to enter Zimbabwe and queues reaching 7,4km.

3. Botswana transit permit requirement (BURS):

- a. Botswana has introduced a 3-day Temporary Permit for foreign transit trucks.
- b. However, operational misalignment with Zambia’s T1 release process – which can take up to 5 days – creates compliance risks, including penalties of P5,000 for late exit and K4,000 for entry into Zambia without a T1, increasing operational and cost uncertainty for cross-border operators.

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

vi. Global shipping industry

- Global trade conditions are becoming increasingly fragmented, as recent tariff adjustments—particularly in the United States—are redistributing competitiveness across countries and sectors, reinforcing structural asymmetries and accelerating trade diversion.
 - Developed economies are consolidating advantages, while developing countries face increasing barriers and constraints to value-chain upgrading, underscoring the strategic importance of diversification and export competitiveness.
- In the global shipping industry, structural overcapacity continues to weigh on market conditions despite improving dry bulk demand driven by commodity flows such as bauxite, soybeans, and steel.
- In container shipping, weakening volumes and excess fleet capacity have accelerated consolidation, exemplified by Hapag-Lloyd’s planned acquisition of ZIM.



- Other developments include **(1)** aggressive blank sailings and alliance restructuring to rebalance supply, **(2)** declining transpacific volumes amid tariff impacts and earlier cargo front-loading, and **(3)** continued freight rate weakness, with global container rates declining by **↓1,3%** (w/w) to **\$1,959 per 40-ft container**.

vii. South African air cargo industry

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

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

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

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

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

viii. International air industry

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