SAVINO DEL BENE®
Global Logistics and Forwarding Company

CARGO MOVEMENT UPDATE

Date: 1 March 2026

Key Notes

- An average of **7,340**[1] **TEUs** were handled per day, with **6,641 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2,558** containers, down by **↓20%** from last week.
- Cross-border queue: **↓0,9 hrs**; transit: **↑2,2 hrs**; SA borders: **~12,7 hrs** (**↑38%**); SADC: **~7,6 hrs** (**↑37%**).
- Iran conflict impacts **20 million barrels of oil**, or **~one-fifth** (as much as **30%**) of **daily global production**.
- Persian Gulf ports: **3,3% of global TEU throughput**, although **10% of the global fleet's routes** = impacted.
- The impact is also felt on global air cargo through important hubs, with more than **3,000 flights cancelled**.

i. Port operations - General

- At our container terminals, an average of **7,340 TEUs** was handled daily, an increase from **6,079 TEUs** the previous week.
  - For the coming week, a decreased average of **~6,641 TEUs** (**↓10%**) is predicted to be handled.
- Weather delays continued to delay port operations, with CTCT starting the week with poor weather conditions, improving towards the end of the week.
  - Inversely, NCT and PECT started the week with clear weather with minor delays towards the end of the week, though most terminals improved volumes from a slow previous week.
  - However, the newly introduced truck booking system continues to create challenges for truckers.

ii. Post operations – Performance Metrics

- CTCT handled an average of **~2 849 TEUs** (**↑14%**, w/w) containers a day, with an average of **~1 742** (**↓39%**) projected this week.
  - For the week, the terminal reported an average of 8 out of 9 cranes and 27 out of 32 RTGs available per day.
- DCT Pier 1 handled **~2 169 TEUs** (**↑135%**, w/w) containers a day, with an average of **~1 669** (**↓23%**) projected this week.
  - The terminal reported an average of five out of seven STS cranes available per day, with no significant challenges reported.
  - The TTT at Pier 1 for the week averaged **~42 minutes** (**↑56%**, w/w), and the average staging time was **~25 minutes** (**↓63%**).
- With the transition of Durban Container Terminal Pier 2 to Durban Gateway Terminal under ICTSI, reporting structures have been revised, and comparable operational data are therefore not currently reflected in this section of the report.
  - Nevertheless, available indicators suggest that landside activity remains relatively steady, with road volumes reportedly performing well.
- The queue of container vessels waiting outside Durban was stable this week.
  - On Tuesday afternoon (3 March), **one** container vessel was waiting outside at anchorage for Pier 1, and **one** for Point.
  - The queue of dry (**eight**), liquid (**three**), and breakbulk (**three**) vessels was also stable from last week.
- South Africa's other container terminals produced the following results for the week at all other terminals:

[1] Figures for this week onward exclude volumes handled by DGT, as the data were not available at the time of reporting

  - Ngqura Container Terminal handled an average of **~1 876 TEUs** (**↑7%**, w/w) containers a day, with an average of **~1 774 TEUs** (**↓5%**) projected this week.
  - Port Elizabeth Container Terminal handled an average of **~155 TEUs** (**↑53%**) containers a day, with an average of **~348 TEUs** (**↑125%**, w/w) projected this week.
  - Other terminals handled a combined average of **~291 TEUs** (**↓63%**, w/w), with an average of **~1 108 TEUs** (**↑281%**) projected this week.
- At RBCT, the daily average coal throughput for the week **decreased slightly** and averaged around **174,000 tons** (**↑12%**, w/w) a day.
  - An average of **23 trains** was serviced on the landside (**slightly higher** than last week's 20), and **slightly below** the target (of **22** trains).
- In the last week (*23 February to 1 March*), rail cargo on the ConCor line out of Durban was reported at **2,558** containers (despite the lack of data for DGT for 28 February/1 March), down by **↓20%** from the previous week's **3,214** containers.

iii. Lebombo border post update

In the last week (*23 February to 1 March)*, movements increased marginally for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **2 trains per day**) were stable this week.

- Truck volumes through the border post increased to around **1,508 HGVs per day** (**↑2%**, w/w).
- Overall queue times increased slightly at an average of **~3,6 hours** at the border.
- The average processing times were stable at an average of **~3,4 hours** (**no change**) per crossing.

iv. SADC cross-border road freight update

- Overall, the average queue time decreased slightly from last week, while transit time increased by more than **two hours**.
- The median border crossing times at South African borders increased by **three and a half hours** on average, averaging **~12,7 hrs** (**↑38%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by **two hours**, averaging **~7,6 hrs** (**↑37%**).

1. **Kakoso Bridge collapse (Zambia):**
   a. The Kakoso Bridge on the Chingola–Chililabombwe route toward Kasumbalesa collapsed following heavy rainfall.
   b. Transporters have been advised to reroute via Mokambo or Sakania while a temporary diversion is being constructed, expected to be operational within approximately 48 hours.
2. **Kazungula congestion and administrative constraints:**
   a. Truck queues at Kazungula reached approximately 5 km earlier in the week but reduced to around 3 km.
   b. Delays were linked to clearing agents exhausting transit bond capacity due to slow cargo movement.
   c. The Zambia Revenue Authority (ZRA) mitigated delays by lowering inspection risk parameters within the ASYCUDA system.
3. **Kazungula Bridge Authority launch and 24-hour operations:**
   a. The Kazungula Bridge Authority (KBA) was formally launched, with leadership from the ZRA and Botswana Unified Revenue Service (BURS).
   b. Authorities confirmed that the border facility will transition to 24-hour operations, although the implementation timeline remains uncertain.

4. **Zimbabwe mineral export suspension:**
    a. Zimbabwe has announced an immediate suspension of exports of raw minerals and lithium concentrates.
    b. Transporters were instructed by ZIMRA to return cargo to mines and offload, introducing potential disruption to regional mineral supply chains.
5. **Hazardous cargo incident near Beitbridge:**
    a. An LPG tanker accident occurred approximately 40 km from Beitbridge on the Bulawayo road.
    b. The driver was hospitalised, and authorities supervised a controlled transfer of product to another tanker.
    c. Traffic in the area was advised to avoid the route due to safety risks.

- In summary, cross-border queue time averaged **~4,1 hours** (down **~0,9 hours** from the previous week's **~5,0 hours**), indirectly costing the transport industry an estimated **$11,9 million** (**R190 million**). Furthermore, the week's average cross-border transit times also hovered around **~8,2 hours** (up by **~2,2 hours** from the **~6,0 hours** recorded in the previous report), at an indirect cost to the transport industry of **$22,6 million** (**R361 million**). The total indirect cost for the week amounts to an estimated **~$34,5 million** (**R551 million**, up by **↑20%** from the **~R458 million** in the previous report.

v. Global shipping industry

- The escalation of the Iran conflict over the weekend of 27–28 February 2026 has significantly altered operating conditions in global shipping, shifting the Gulf region from a period of heightened tension to an environment characterised by acute war-risk exposure.
- AIS data show numerous vessels remaining stationary in the Persian Gulf and Gulf of Oman, with **roughly 147 ships idling** in the region as operators delay transits through the Strait of Hormuz while assessing security and insurance risks.
- The waterway remains a critical global chokepoint, carrying around **20 million barrels of oil per day** – roughly **one-fifth of global supply** – making disruptions highly consequential for energy shipping markets.
    - War-risk insurance withdrawals and sharply rising premiums have already driven tanker freight rates higher and reduced chartering activity, amplifying the economic impact beyond any direct physical disruption.
- Container shipping is also experiencing operational disruption.
    - Around **650,000 TEU** of weekly container throughput handled at Persian Gulf ports – approximately **3,3% of global volume** – could be affected, while services transiting the Strait involve about **10% of the global containership fleet**.
    - More than **130 containerships are currently trapped in the Gulf**, and carriers have suspended bookings to the Middle East, rerouting some services via the Cape of Good Hope.
- The resulting network adjustments are expected to lengthen voyage times, tighten vessel supply, and increase freight rates.
- Although maritime traffic around South Africa may rise due to Cape diversions, the benefits to local ports remain limited unless additional maritime services such as bunkering, repairs, and crew changes are expanded.

vi. South African air cargo industry

- Because of the Iran conflict, international inbound cargo was severely reduced this week, as all Emirates and Qatar flights were cancelled.
    - Consequently, the daily average amounted to **~525,000 kg** inbound (**↓26%**, w/w) and **~396,000 kg** outbound (**↑3%**).
    - Despite the suppressed number of flights to and from the Middle East, total ORTIA volume for February still increased by **↑35%** (m/m) and **↑12%** (y/y).

vii. International air industry

- The escalation of the Iran conflict has also disrupted global air cargo networks, primarily through airspace restrictions and hub instability across the Middle East.
    - Since the onset of hostilities, roughly **3,000 flights have been cancelled**, affecting both passenger operations and the **belly-hold cargo capacity** that supports a significant share of East–West air freight flows.
- Major regional hubs, including Dubai and Doha, have experienced intermittent disruptions, with airlines suspending or rerouting services to avoid restricted airspace.
    - These detours lengthen flight paths, reduce available cargo capacity, and create operational imbalances as aircraft and cargo equipment fall out of position.
- Freight forwarders are already reporting **space shortages, booking restrictions, and rapidly changing schedules**, while some operators have temporarily paused cargo acceptance at Gulf hubs.
- The immediate effect is a tightening of global air cargo capacity and upward pressure on freight rates as airlines reconfigure networks and clear emerging backlogs.
- Notably, the most recent market data – showing a **20% decline in global chargeable weight during the Lunar New Year period** and average freight rates around **$2,38/kg** – predates the escalation of the Iran conflict and therefore does not yet capture the potential geopolitical impact on air cargo markets.