



Date: 8 March 2026

Key Notes

- An average of **7,992¹ TEUs** were handled per day, with **6,641 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2,431** containers, down by **↓5%** from last week.
- Cross-border queue: **↑2,6 hrs**; transit: **↓1,7 hrs**; SA borders: **~10,2 hrs (↓20%)**; SADC: **~6,0 hrs (↓21%)**.
- Strait of Hormuz transits down by **↓97%**, with **20-25%** of **global oil & LNG** affected; **~2%** of containers.
- Iran conflict affecting **~15%** of **global air cargo capacity**, with jet fuel supply short and rates soaring.

i. Port operations - General

- At our container terminals, an average of **7,992 TEUs** was handled daily, an increase from **7,340 TEUs** the previous week.
 - For the coming week, a decreased average of **~6,641 TEUs (↓17%)** is predicted to be handled.
- Port operations improved somewhat over the past week, with significantly fewer reports of weather delays and equipment breakdowns.
 - Minor congestion was experienced in the Cape Town Multi-Purpose Terminal due to an overflow of empty containers, though the issue was quickly resolved.
 - The truck booking system, newly implemented in NCT, continues to cause concern as the industry struggles to obtain the slots needed to service its clients.

ii. Post operations – Performance Metrics

- CTCT handled an average of **~2 248 TEUs (↓21%, w/w)** containers a day, with an average of **~1 742 (↓23%)** projected this week.
 - Equipment availability remains consistent, with 8 out of 9 cranes and 25 out of 32 RTGs available on average throughout the week.
- DCT Pier 1 handled **~1 949 TEUs (↓10%, w/w)** containers a day, with an average of **~1 669 (↓14%)** projected this week.
 - Pier 1 had a slightly slower week, though landside volumes remained consistent, with an average truck turnaround time of **75 minutes (↑79%, w/w)** and staging of **79 minutes (↑216%)**.
 - The terminal also reported an average of four out of seven cranes and 15 out of 25 RTGs available.
- The queue of container vessels waiting outside Durban was stable this week.
 - The queue of container vessels waiting outside Durban increased slightly this week.
 - On Tuesday afternoon (10 March), **two** container vessels were waiting outside at anchorage for Pier 1, and three for DGT.
- South Africa's other container terminals produced the following results for the week at all other terminals:
 - Ngqura Container Terminal handled an average of **~2 332 TEUs (↑24%, w/w)** containers a day, with an average of **~1 774 TEUs (↓24%)** projected this week.
 - Port Elizabeth Container Terminal handled an average of **~223 TEUs (↑44%)** containers a day, with an average of **~348 TEUs (↑56%, w/w)** projected this week.
 - Other terminals handled a combined average of **~1 240 TEUs (↑326%, w/w)**, with an average of **~1 108 TEUs (↓11%)** projected this week.

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



- At RBCT, the daily average coal throughput for the week **increased slightly** and averaged around **187,000 tons (↑7%, w/w)** a day.
 - An average of **22 trains** was serviced on the landside (**slightly lower** than last week's 23), and **on par with** the target (of 22 trains).
- In the last week (2 to 8 March), rail cargo on the ConCor line out of Durban was reported at **2,431** containers (despite the lack of data for DGT for 28 February/1 March), down by **↓5%** from the previous week's **2,558** containers.

iii. Lebombo border post update

In the last week (2 to 8 March), movements decreased marginally for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **1 train per day**) also decreased slightly this week.

- Truck volumes through the border post decreased to around **1,451 HGVs per day (↓4%, w/w)**.
- Overall queue times increased slightly at an average of **~3,9 hours (↑8%)** at the border.
- The average processing times also increased slightly at an average of **~3,5 hours (↑3%)** per crossing.

iv. SADC cross-border road freight update

- Overall, the average queue time increased by more than **two and a half hours** from last week, while transit time decreased by nearly **two hours**.
- The median border crossing times at South African borders decreased by **two and a half hours** on average, averaging **~10,2 hrs (↓20%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) also decreased by an hour and a half, averaging **~6,0 hrs (↓21%)**.

1. Kasumbalesa diversion road reopened:

- a. The temporary diversion route constructed after a road collapse near the Kasumbalesa corridor was initially expected to be completed by Wednesday, but was reopened earlier on Monday evening, restoring traffic flow on the route.

2. ASYCUDA World disruptions in Zambia:

- a. The national customs platform experienced widespread outages affecting **Tax Online and Smart Invoice systems**, preventing payment processing. Authorities temporarily reverted to **manual payment procedures**.
- b. The system resumed operations by Wednesday morning following a directive giving the responsible task team **48 hours to restore functionality**.

3. New cross-border levy introduced:

- a. As of **2 March**, a new levy was implemented at **Kasumbalesa, Sakania, and Mokambo**, set at **\$35 for imports and \$55 for exports**.
- b. The measure was introduced **without prior notice**, prompting requests for clarification from transport operators.

4. Severe congestion at Kazungula:

- a. Border delays worsened during the week, with some trucks that arrived on **Sunday still waiting by mid-week**.
- b. By Thursday afternoon, the **northbound queue exceeded 10 km**.

5. Security and safety incidents at the Kazungula corridor:

- a. Theft of **prop shafts from three trucks** occurred overnight, with estimated losses of **over R60,000 per unit**.



- b. Queuing traffic now occupies **two lanes**, constraining opposing traffic flows and contributing to an accident involving a tanker spill that required road cleanup.

6. CONDEP inspection delays:

- a. Persistent congestion linked to **CONDEP inspection processes** continues to cause extended waiting times, with operators requesting that inspections be conducted **while vehicles remain in the parking area** to reduce delays.
- 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

- Since late February 2026, joint US-Israeli military strikes on Iran and subsequent Iranian retaliation have precipitated a de facto closure of the **Strait of Hormuz**, a narrow chokepoint that normally transits **≈20–25% of global seaborne oil and liquefied natural gas** and significant volumes of fertilisers.
 - Traffic through the Strait collapsed sharply – daily ship transits fell from typical averages of over **129 to single-digit levels (↓97%)** as carriers suspended voyages and avoided the area due to security risks, hostile warnings, and the withdrawal of war-risk insurance.
- Looking deeper into the composition of container vessels currently in the Strait, some ports are acting as spillover ports.
 - Ships waiting outside the Strait of Hormuz have started to build up as ports in the Arabian Gulf struggle to cater to the increased demand.
 - Salalah, Khor Fakkan, Fujairah, Sohar and Duqm have all seen increased vessel traffic, with operations at Salalah partially disrupted last week following a drone attack.
- After the record number of containers handled globally was achieved in December last year, the latest container throughput figures from *Container Trade Statistics* (CTS) show that container volume decreased substantially in January.
 - The total throughput is down by **↓5,4%** monthly – but increased by **↑3,6%** (y/y) annually.
- Regionally, all import and export flows were down month-on-month (led by South and Central America at **↓11,5%** on the import side, and Europe at **↓18,9%** on the export side) – much as expected.
- For prices, the CTS global price index (dry and reefer combined) was stable in January, but remains down by more than **↓18%** yearly.
- Throughput in January reached **16 million TEUs** – some **920 thousand containers** below the record level achieved in December.
- SSA exports decreased significantly in January and were down by **↓6,7%** (m/m) – but still up by **↑13,2%** (y/y) versus 2025. Imports, on the other hand, were down by **↓11,1%** (m/m) – but still up by **↑16,3%** (y/y).

vi. South African air cargo industry

- This week's international cargo flows were materially constrained due to Middle East airspace closures and regional security disruptions.
- Major Gulf carriers (including Emirates and Qatar Airways) operated at significantly reduced capacity, with many scheduled services to and from South Africa suspended or limited pending airspace authorisation.



- Consequently, the daily average amounted to **~531,000 kg** inbound (**↑1%**, w/w) and **~331,000 kg** outbound (**↓16%**).
- Current volumes to and from ORTIA are now below the commensurate volumes of March last year (**↓2%**) and significantly below the pre-pandemic March of 2020 (**↓7%**).

vii. International air industry

- Airspace closures across parts of the Gulf have removed **nearly 40% of Asia–Europe air cargo capacity**, forcing airlines to reroute flights around restricted corridors and bypass several key Middle Eastern hubs.
- As a result, carriers and forwarders are increasingly using **cross-border trucking to move cargo to operational airports in the Gulf**, while tighter capacity and longer routings are pushing **Asia–Europe airfreight rates sharply higher** and creating backlogs across several trade lanes.
- Europe is particularly exposed due to its reliance on Persian Gulf supply, while higher insurance costs and longer rerouting via the Cape of Good Hope are pushing fuel premiums higher and increasing delivery times for airlines.
- Global air cargo demand rebounded following the Lunar New Year period, with worldwide chargeable weight rising about **↑2%** week-on-week, led by strong outbound volumes from the Asia Pacific and technology-related shipments.
 - Freight rates softened slightly, declining around **↓3%** (w/w) and **↓1%** (y/y), indicating weaker pricing power despite relatively constrained capacity.
 - The late-week escalation of the Iran conflict caused sudden disruptions in the Middle East and South Asia region – temporarily affecting roughly **15% of global capacity** and triggering sharp short-term declines in regional export volumes.