



Date: 15 March 2026

Key Notes

- An average of **9,268¹ TEUs** were handled per day, with **6,641 TEUs** projected for next week.
- TNPA Feb: TEUs: **↑9%** (m/m) & **↑9%** (y/y). Bulk: **↓19%** but **↑7%**. Vehicles: **↓20%** & **↓14%** (y/y).
- Rail cargo handled out of Durban was reported at **2,902** containers, up by **↑19%** from last week.
- Cross-border queue: **↓1,7 hrs**; transit: **↓1,8 hrs**; SA borders: **~8,2 hrs (↓20%)**; SADC: **~4,3 hrs (↓28%)**.
- Port congestion at the key hub ports across South Asia has started to ease following the initial disruptions
- Global air cargo markets opened 2026 with continued growth, with CTks increasing by **↑5,6%** (y/y).

i. Port operations - General

- At our container terminals, an average of **9,268 TEUs** was handled daily, an increase from **6,641 TEUs** the previous week.
- Port operations were plagued by some weather delays across various ports, leading to vessel changeovers.
- The truck booking system remains a challenge across ports, notably in Ngqura.

ii. TNPA: February update:

TNPA has released consolidated port statistics for February², with the figures showing that:

- Container throughput totalled **387,107 TEUs**, which is up by **↑9%** (m/m) and **↑9%** (y/y).
- Total bulk cargo totalled **19,3 million tonnes**, which is down by **↓19%** (m/m), but up by **↑7%** (y/y).
- Vehicle throughput totalled **54,012 units**, which is down by **↓20%** (m/m) and **↓14%** (y/y).

iii. Post operations – Performance Metrics

- CTCT handled an average of **~2,706 TEUs (↑20%, w/w)** containers a day, with an average of **~1,742 (↓36%)** projected this week.
 - Equipment availability remained consistent, with eight out of 9 cranes and 28 out of 32 RTGs available on average across the week
- DCT Pier 1 handled **~2,601 TEUs (↑33%, w/w)** containers a day, with an average of **~1,669 (↓36%)** projected this week.
 - Pier 1 had an average of two vessels at anchorage throughout the week, with an increase in waterside volumes from the previous week.
 - The terminal reported an average of five out of seven cranes and 16 out of 25 RTGs, consistent with previous weeks.
 - Truck turnaround time averaged **71 minutes (↓4%, w/w)** and staging **49 minutes (↓38%)**.
- The queue of container vessels waiting outside Durban was stable this week.
 - The queue of container vessels waiting outside Durban decreased this week.
 - On Wednesday afternoon (17 March), **zero** container vessels were waiting outside at anchorage for Durban.
 - The queue of dry (**four**), liquid (**six**), and breakbulk (**one**) vessels also decreased slightly from last week.

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

² Transnet. 2025. [Port statistics](#).



- South Africa's other container terminals produced the following results for the week at all other terminals:
 - Ngqura Container Terminal handled an average of **~2,172 TEUs (↓7%, w/w) containers** a day, with an average of **~1 774 TEUs (↓24%)** projected this week.
 - Port Elizabeth Container Terminal handled an average of **~398 TEUs (↑78%)** containers a day, with an average of **~348 TEUs (↓12%, w/w)** projected this week.
 - Other terminals handled a combined average of **~1,391 TEUs (↑12%, w/w)**, with an average of **~1,108 TEUs (↓20%)** projected this week.
- At RBCT, the daily average coal throughput for the week **decreased** and averaged around **162,500 tons (↓13%, w/w)** a day.
 - An average of **24 trains** was serviced on the landside (**slightly higher** than last week's 22), and **above** the target (of 22 trains).
- In the last week (9 to 15 March), rail cargo on the ConCor line out of Durban was reported at **2,902** containers (despite the lack of data for DGT for 28 February/1 March), up by **↑19%** from the previous week's **2,431** containers.

iv. Lebombo border post update

In the last week (9 to 15 March), movements decreased very marginally for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **1 train per day**) were stable this week.

- Truck volumes through the border post decreased to around **1,446 HGVs per day (↓0,4%, w/w)**.
- Overall queue times decreased slightly to an average of **~3,1 hours (↓21%)** at the border.
- The average processing times also decreased slightly at an average of **~3,0 hours (↓14%)** per crossing.

v. SADC cross-border road freight update

- Overall, the average queue time decreased by nearly **an hour and three-quarters** from last week, while transit time decreased by almost **the same magnitude**.
- The median border crossing times at South African borders decreased by **two hours** on average, averaging **~8,2 hrs (↓20%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) also decreased, going down by **an hour and three-quarters**, averaging **~4,3 hrs (↓28%)**.

1. Groblersbrug Border Post:

- a. Conditions deteriorated significantly, with transporters reporting **waiting times of up to four days to cross**.
- b. **Queue-jumping behaviour by drivers** has worsened congestion. Some trucks reportedly bypass the main queue and park closer to border offices to obtain receipts allowing entry into the secondary queue.
- c. **Heavy rainfall in Botswana** around Ramma lands led to the **temporary closure of the B140 road** toward Groblersbrug.
- d. Transporters were advised to **divert to alternative crossings**, and **pre-cleared vehicles** were authorised to proceed via other border posts.

2. Beitbridge Border Post

- a. Operations were disrupted on Thursday morning due to a **power outage on the South African side**.
- b. The **backup generator failed to start**, leaving the border without power for most of the day.



- c. Technicians restored the system **shortly before 8:00 p.m. on Thursday**, after which processing resumed.

3. Kazungula Border Post:

- a. **Severe congestion developed**, with approximately **640 trucks waiting to cross the Zambezi** and a queue stretching around **17 km**.
- b. Delays stemmed largely from **last week's outage of the ASYCUDA customs system**, which prevented transporters from generating Payment Registration Numbers (PRNs) electronically.
- c. During the outage, **PRNs had to be issued manually by customs officials**, creating significant processing delays.
- d. Some transporters reported **waiting up to seven days** to enter Zambia.
- e. Truck stops in Kazungula were **at full capacity**, forcing additional trucks to park along public roads.

4. Nakonde Border Post / Tunduma Border Post:

- a. **Double-queue congestion** was reported at the Nakonde–Tunduma crossing, reflecting the broader regional knock-on effects from the ASYCUDA disruption.
 - b. By Friday morning, reports indicated that **Zambian border operations had largely returned to normal**, with system functionality restored and queues beginning to clear.
- In summary, cross-border queue time averaged **~4,9 hours** (down **~1,7 hours** from the previous week's **~6,6 hours**), indirectly costing the transport industry an estimated **\$13,2 million (R223 million)**. Furthermore, the week's average cross-border transit times also hovered around **~4,8 hours** (down by **~1,8 hours** from the **~6,5 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$6,2 million (R106 million)**. The total indirect cost for the week amounts to an estimated **~\$19,4 million (R329 million)**, down by **↓48%** from the **~R631 million** in the previous report.

vi. Global shipping industry

- Global trade conditions remain subdued but structurally reconfiguring, with developing economies increasingly anchoring growth as South–South trade expands as a stabilising force.
 - Trade flows are progressively reoriented toward intra-developing market exchanges, supported by Asia-centric value chains and strengthening Africa–Asia and Africa–Latin America linkages, which are offsetting weaker demand from advanced economies.
- In global shipping, disruption in the Strait of Hormuz has exposed systemic dependence on a critical chokepoint, with limited viable alternatives and only partial substitution capacity.
 - While initial congestion impacts across Asia have eased and delays remain contained, network instability persists through rate volatility, opportunistic cargo handling, and tightening bunker supply.
 - The episode reinforces structural fragilities in hub-and-spoke networks and highlights underinvestment in multimodal resilience.

vii. South African air cargo industry

- This week's international cargo flows bounced back after the significant reductions (mainly led by the Middle East airspace closures and regional security disruptions) experienced last week.
 - Consequently, the daily average amounted to **~593,000 kg** inbound (**↑12%**, w/w) and **~420,000 kg** outbound (**↑27%**).



- Current volumes to and from ORTIA are again above the commensurate volumes of March last year (**↑16%**) and the pre-pandemic March of 2020 (**↑9%**).
- Monthly, international air cargo volumes declined across all major South African gateways in February 2026 – Johannesburg (**↓13%**, m/m; **↓18%**, y/y), Cape Town (**↓27%**, m/m; **↓35%**, y/y), and Durban (**↓17%**, m/m; **↓4%**, y/y) – resulting in total international air cargo throughput falling by **↓22%** year-on-year compared with February 2025.
- Domestic air cargo volumes broadly strengthened in February 2026 – Johannesburg (**↑17%**, m/m; **↑19%**, y/y) and Cape Town (**↑20%**, m/m; **↓12%**, y/y) recorded monthly gains, while Durban declined sharply (**↓42%**, m/m; **↑2%**, y/y) – resulting in total domestic air cargo throughput increasing by **↑6%** both month-on-month and year-on-year.

viii. International air industry

- Global air cargo markets remain resilient in January, with latest demand (CTKs) figures from IATA expanding by **↑5,6%** (y/y) (**↑7,2%** international), outpacing capacity growth (ACTKs **↑3,6%**), and modest load factor gains indicating broadly balanced market conditions despite emerging capacity constraints and regional divergence.
 - Growth continues to be led by Africa, the Middle East, and Asia-Pacific, while structural drivers – particularly e-commerce, trade reconfiguration, and AI-related flows – sustain air cargo’s outperformance relative to broader global trade.
- According to the high-frequency data from WorldACD, global air cargo volumes have softened, with chargeable weight declining by **↓4%** (w/w) and **↓12%** (y/), amid widespread disruptions – particularly in the Middle East – driven by sharp capacity reductions of over 30% week-on-week.
 - Despite weaker volumes, rates have increased by approximately **↑6%** week-on-week to around **\$2,40/kg**, indicating a tightening market where supply-side constraints, rather than demand strength, are driving pricing dynamics.