



Date: 12 April 2026

Key Notes

- An average of **6,768 TEUs** were handled per day, with **7,714 TEUs** projected for next week.
 - TNPA Mar: TEUs: **↑17%** (m/m) & **↑14%** (y/y). Bulk: **↑13%** & **↑7%**. Vehicles: **↑72%** & **↑11%** (y/y).
 - Rail cargo handled out of Durban was reported at **2,138** containers, up by **↑81%** from last week.
 - Cross-border queue: **no change**; transit: **↑0.7 hrs**; SA borders: **~10.3 hrs (↓7%)**; SADC: **~6.7 hrs (↑16%)**.
- i. Port operations - General**
- At our container terminals, an average of **6,768 TEUs** was handled daily, a decrease from **7,619 TEUs** the previous week.
 - Reduced volumes across the port system characterised port operations throughout the week, except for the Cape Town Container Terminal.
 - CTCT reported no weather delays, adding to the improved performance. In Durban, Pier 1 showed reduced volumes, while the limited data from Durban Gateway Terminal hinted at a strong week.
 - The Eastern Cape had lower than usual volumes, with reduced capacity for the coming weeks due to equipment outages (for maintenance).
 - Transnet Port Terminals has implemented a fuel neutrality charge of **R52 per container from 1 May 2026**, triggered by a sharp increase in coastal diesel prices to **R25.04/l**, with the charge structured as a threshold-based, monthly-adjusted cost recovery mechanism.
 - While the framework aligns with input-cost pass-through principles, its step-based design and limited transparency on underlying cost exposure suggest **partial, rather than fully neutral, cost recovery**.

ii. TNPA: March Update

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

- Container throughput totalled **452,125 TEUs**, which is up by **↑17%** (m/m) and **↑14%** (y/y).
- Total bulk cargo totalled **21,7 million tonnes**, which is up by **↑13%** (m/m) and **↑2%** (y/y).
- Vehicle throughput totalled **93,128 units**, which is up by **↑72%** (m/m) and **↑11%** (y/y).
- After the first quarter of 2026, overall container throughput at Durban is up by **↑6.2%**, with throughput at DGT up by slightly more, at **↑6.6%**.

iii. Post operations – Performance Metrics

- CTCT handled a projected average of **~2,615 TEUs (↑4%, w/w)** containers a day, with a projected average of **~2,121 TEUs (↓19%)** next week.
 - An average of eight out of 9 cranes and 27 out of 32 RTGs were available throughout the week.
 - An average of three vessels were reported at berth (spending around 41 hours at berth), and two at anchorage (at an average of 30 hours spent at anchorage), with a total of 10 vessel calls through the week, further adding to the increased volumes.
- DCT Pier 1 handled a projected average of **~1,823 TEUs (↓3%, w/w)** containers a day, with a projected average of **~1,889 TEUs (↑4%)** next week.
 - Pier 1's waterside volumes are slightly down from the previous week, paired with lower rail volumes.



- The terminal had around four vessel calls through the week, with an average of one vessel at anchorage (waiting around 35 hours), and two vessels at berth (working for around 48 hours).
- Throughout the week, the terminal had an average of five out of seven cranes and 13 out of 25 RTGs available.
- The **TTT** for the week averaged **~49 minutes (↓28%, w/w)**, and the average **staging time** was **~29 minutes (↓48%)**.
- Durban Gateway Terminal reported an average of 11 out of 15 cranes available throughout the week.
 - There was an average of four vessels at berth (working for an average of 83 hours), and one vessel at anchorage (waiting around 10 hours).
 - The terminal is estimated to have moved around 3,500 containers per day.
- The queue of container vessels waiting outside Durban **was stable** this week.
 - On Thursday afternoon (9 April), **two** container vessels were waiting outside at anchorage for Durban, **one** for Pier 1 and **one** for DGT.
 - The queue of dry (**eight**), liquid (**one**), and breakbulk (**zero**) vessels was also stable from last week.
- South Africa's other container terminals produced the following projected results for the week:
- Ngqura Container Terminal handled a projected average of **~1,826 TEUs (↓19%, w/w) containers** day, with a projected average of **2,404 TEUs (↑32%)** next week.
 - Port Elizabeth Container Terminal handled a projected average of **~227 TEUs (↓21%)** containers a day, with a projected average of **~380 TEUs (↑67%)** next week.
 - Other terminals handled a combined projected average of **~277 TEUs (↓60%, w/w)**, with a projected average of **~920 TEUs (↑232%)** next week.
- At RBCT, the daily average coal throughput for the week **decreased substantially** and averaged around **135,000 tons (↓37%, w/w)** a day.
 - An average of **20 trains** was serviced on the landside (**down** from last week's **24**), and **slightly below** the target (of **22** trains).
- In the last week (*6 to 12 April*), rail cargo on the ConCor line out of Durban was reported at **2,138** containers, up by **↑81%** from the previous week's **1,184** containers.

iv. Lebombo border post update

- On the N4 corridor, movements increased for heavy-goods vehicles, as trains from KM4 to Maputo (an average of **1 train per day**) also increased for the week.
- Truck volumes through the border post increased to around **1,522 HGVs per day (↑5%, w/w)**.
 - Overall, queue times decreased to an average of **~3.6 hours (↓14%)** at the border.
 - The average processing times also decreased to an average of **~3.4 hours (↓17%)** per crossing.
 - It appears that the visit from Minister Creecy last week has had a positive effect on HGV volume and processing times.

v. SADC cross-border road freight update

- Overall, Heavy Goods Vehicle (HGV) traffic through South Africa's main border posts increased by a significant **↑14% (m/m)**.
 - Northbound traffic (Eastbound for Lebombo) increased across the board, notably at **Lebombo (↑19%)**, **Kopfontein (↑16%)** and **Ramatlabama (↑15%)**.
 - Southbound traffic (Westbound for Lebombo) also increased across the board, notably at **Kopfontein (↑32%)**, **Skilpadshek (↑32%)**, and **Ramatlabama (↑22%)**.



- Overall, the most significant increases were at Lebombo (**↑18%**), Kopfontein (**↑17%**), and **Ramatlabama (↑17%)**. Beitbridge was mostly stable (**↑1%**).
- Weekly land border crossing figures in the SADC region show that the average queue time was mostly stable from last week, as transit time increased by approximately **three-quarters of an hour**.
 - The median border crossing times at South African borders decreased by about **three-quarters of an hour on average, averaging ~10.3 hrs (↓7%)** for the week.
 - In contrast, the greater SADC region (excluding South African-controlled) increased by **nearly an hour, averaging ~6.7 hrs (↑16%)**.
 - This week, on average, the same two SADC borders took more than a day to cross, namely Chirundu OSBP and Kasumbalesa (the worst affected, taking around **five days** to cross from the **Zambian side**).
- In summary, cross-border queue time averaged **~6.4 hours (no change)** from the previous week's **~6.4 hours**, indirectly costing the transport industry an estimated **\$22.4 million (R377 million)**. Furthermore, the week's average cross-border transit times hovered around **~7.1 hours** (up by **~0.7 hours** from the **~6.4 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$19 million (R320 million)**. The total indirect cost for the week amounts to an estimated **~\$41.5 million (R698 million)**, up by **↑11%** from the **~R629 million** in the previous report.

vi. Global trade update

- In the latest “*Global Trade Update*” from UNCTAD for April 2026, the UN-agency notes that global trade continued to expand into early 2026, supported primarily by developing economies, with **East Asia and Africa emerging as key growth drivers**.
- Strong performance in these regions reflects sustained demand in manufacturing, commodities, and South–South trade linkages, reinforcing a structural shift away from traditional demand centres.
- While volumes remain resilient, trade value growth is partly inflation-driven, with structural dependencies heightening exposure to systemic shocks.

vii. Global shipping industry

- Global shipping markets remain constrained by the Strait of Hormuz disruption, with the system in day 9 of a two-week ceasefire, but risks are still elevated.
 - Gulf-bound mainline capacity remains down at least **↓48%**, while backlog conditions have eased, with stranded fleet capacity declining from **1.4% to 1.0%** inside the Gulf and to just **↓0.2%** outside.
 - Transit flows have resumed but remain below pre-conflict norms, with voyage extensions of **10–14 days** reducing effective capacity.
 - Fuel prices (mid-\$90/bbl) continue to drive elevated BAFs and rate volatility, although below COVID-era extremes. The Middle East accounts for <5% of global throughput, limiting systemic risk, but second-order effects persist.
 - *Drewry* forecasts global container growth slowing to **↑1.8%** in 2026, with downside risk to **0.5–1.3%**.
- For shippers, the implication is to standardise bunker cost management, actively monitor alternative routings, and avoid planning assumptions based on near-term normalisation.
 - Contracting strategies should leverage structural overcapacity, while supply chains must build flexibility to accommodate longer transit times and ongoing geopolitical volatility.

**viii. South African air cargo industry**

- This week's international cargo flows significantly subsided – especially with exports.
 - The daily average amounted to **~572,000 kg** inbound (**↓11%**, w/w) and **~321,000 kg** outbound (**↓20%**).
 - Current volumes to and from ORTIA are nonetheless still above the commensurate volumes of April last year (**↑6%**) – but below the pre-pandemic April of 2019 (**↓8%**).
- Monthly, international air cargo volumes were mixed across South Africa's major gateways in March 2026 – Johannesburg (**↑60%**, m/m; **↑7%**, y/y) rebounded strongly, while Cape Town (**↓14%**, m/m; **↓52%**, y/y) and Durban (**↓67%**, m/m; **↓72%**, y/y) recorded sharp contractions – resulting in total international air cargo throughput declining by **↓9%** year-on-year compared with March 2025.
- Domestic air cargo volumes were generally resilient in March 2026 – Johannesburg (**↑4%**, m/m; **↑64%**, y/y) and Durban (**↑5%**, m/m; **↑3%**, y/y) posted gains, while Cape Town (**↓4%**, m/m; **↓3%**, y/y) softened marginally – resulting in total domestic air cargo throughput increasing by **↑2%** month-on-month and **↑29%** year-on-year.

ix. International air industry

- Global air cargo markets continue to feel the effects of the conflict, as air cargo volumes declined **↓4%** week-on-week, reflecting seasonal weakness and broad regional slowdowns, while rates rose **↑4%** to **\$3.10/kg** (**↑21%**, y/y) amid capacity constraints and disruption-linked surcharges.
- A fragile Middle East ceasefire offers limited relief, with constrained capacity likely to sustain elevated pricing despite softer demand.