Southern Africa's

freight news features

by ftw

August 2026

COLD CHAIN LOGISTICS

CORRIDORS

PROJECT CARGO

TRAINING & RECRUITMENT

AIRFREIGHT

Southern Africa's freight news by ftw

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CONTENTS

South Africa's logistics industry continues to demonstrate its ability to compete with the very best in the world. In this issue, our Cold Chain Logistics feature highlights the groundbreaking work being done by the Perishable Products Export Control Board, which is developing a world-first digital container loading module designed to streamline export certification and reduce costly delays.

We also examine the infrastructure and trade developments driving freight demand in our Corridors feature, while Project Cargo explores the major mining, energy and infrastructure investments fuelling heavy-lift and breakbulk opportunities across the region.

Rounding out the issue are features on Training & Recruitment and Airfreight, looking at the people, skills and connectivity shaping the future of logistics.

As always, we hope you enjoy this month's edition and the stories shaping our industry.

Happy reading,

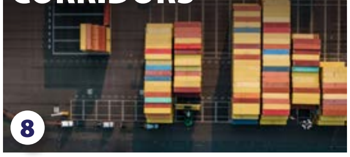
Liesl Venter

Volume 68 August 2026

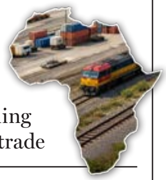
COLD CHAIN LOGISTICS

3 PPECB to launch pioneering digital solution
4 Quality of data as important as cargo movement
6 Food and beverage sector buoys business sentiment

CORRIDORS



8 New multimodal corridor to link southern African countries
10 Major investments will streamline cargo flow
12 Maputo making inroads in rail growth plan
14 Lobito transforming regional mineral trade



PROJECT CARGO

15 Bullish outlook for the sector
18 Additional routing options boost export access
20 Demand for heavy-lift capabiity
24 Record Chinese EV exports constrain capacity
26 Maputo invests in digital trade platform

TRAINING & RECRUITMENT

27 Candidates need to hit the ground running
28 AI proficiency a must-have
30 Real-world exposure an ongoing challenge

AIRFREIGHT

31 Rates expected to increase
32 Industry shifting to value-dense cargo
34 Capacity constraints an ongoing challenge

Feature by Liesl Venter

PPECB to launch pioneering digital solution

The Perishable Products Export Control Board (PPECB) is in an advanced stage of development of its digital cold chain container loading module, a world first, that could significantly reduce export administration delays by enabling export and phytosanitary certificates to be issued immediately after containers are sealed.

According to Vijan Chetty, general manager: coastal at PPECB, the digital platform will provide industry stakeholders with real-time information that supports faster, more informed decision-making throughout the export process.

"The PPECB has made significant strides in digitising the cold chain export value chain," he told *Freight News*.

The initiative will integrate cold chain, quality assurance and phytosanitary processes and validations into a single digital platform, providing end-to-end visibility and verification throughout the export value chain.

Chetty said the system had been specifically designed to address operational challenges, including the substitution or swapping of pallets during container stuffing. Through automated validations and real-time data verification, any pallet changes will be accurately recorded and validated without disrupting operations.

"This innovative approach minimises the risk of errors, prevents delays during container stuffing and supports the seamless movement of export consignments through the cold chain," he said.

The digitalisation initiative will also be expanded to facilitate the electronic issuance of export and phytosanitary certificates immediately upon the sealing of container doors, using cold chain container loading information.

> We envisage that exporters will soon be able to obtain export and phytosanitary certificates on the same day that containers are loaded and sealed.
> – Vijan Chetty

"This marks a substantial improvement in efficiency, as these critical documents are currently issued up to five days after a vessel departs from South Africa," said Chetty.

He said the enhanced process would streamline export operations, improve traceability, reduce administrative delays and strengthen the competitiveness of South African exports in international markets.

"We envisage that exporters will soon be able to obtain export and phytosanitary certificates on the same day that containers are loaded and sealed, significantly reducing administrative delays and accelerating the export process," said Chetty.

The elimination of manual data capture is another major advantage, improving operational efficiency while reducing the risk of human error.

"It furthermore provides stakeholders with real-time visibility and statistics across the export value chain, enabling faster, data-driven decision-making and improved supply chain performance," he said.

The export notification data generated through the system is already being shared with key stakeholders, including Transnet Port Terminals and industry bodies.

The platform will next be expanded to incorporate container terminal monitoring at South African ports, providing stakeholders with real-time visibility of container movements and status updates within port terminals.

According to Chetty, once all components of the container loading module have been completed, the PPECB will begin the next phase of its digital transformation programme by developing an electronic solution for specialised refrigerated vessels. LV

Quality of data as important as cargo movement

Record agricultural exports are placing new demands on South Africa's perishable supply chain, with the industry increasingly turning to integrated digital systems to improve visibility, traceability and efficiency.

The country recorded a new agricultural export record in 2025, with exports increasing by approximately 10% year on year, while agricultural imports rose by around 4% over the same period.

According to Leon Jansen, projects and development manager at ShipShape, much of this growth is linked to fruit and other temperature-sensitive products, resulting in greater volumes moving through already pressured cold-chain networks.

"This growth brings both pressure and opportunity. Practical logistics constraints such as ports, transport routes, reefer availability, cold-store capacity and seasonal congestion remain important, particularly during peak export periods," he said.

"But higher volumes also expose weaknesses in the way information moves with perishable cargo. The same data is often captured multiple times, information does not always move seamlessly between systems, certification processes can still be paper intensive, and there is often limited visibility of cargo status across the supply chain."

Jansen said this was why electronic export documentation was becoming increasingly important to cold-chain efficiency.

Building visibility

Recent developments that have brought eCert administration under PPECB are expected to improve coordination between inspection, certification and export processes. Building on this, the Tracking Unit Manager (TUM) is emerging as a key eCert module for improving traceability across South Africa's perishable export chain.

TUM provides a shared record for pallet movement and status data that can be used by approved stakeholders in the perishable supply chain. For the cold chain, this represents a significant move beyond traditional pallet-out and pallet-in file exchanges towards a more integrated and traceable export process.

> "Industry participants need systems that can adapt to changing data requirements, integration standards and electronic documentation processes.
> – Leon Jansen

Jansen said one of the biggest opportunities lay in improving how information was transferred between the various participants in the cold chain.

"As cargo moves from producer to packhouse, cold store, forwarding agent, port and ultimately the export process, the quality and timing of data become just as important as the physical movement of the product," he said.

"A pallet, certificate, addendum, inspection result or shipment status must be immediately recognisable and usable by the next participant in the chain. Any breakdown in that flow can create delays, duplication and unnecessary administration."

Tackling obstacles

According to Jansen, initiatives such as TUM are helping to address these challenges by creating a shared traceability layer across the perishable export supply chain.

"The value of TUM is that it creates a common source of information that can be accessed and used by multiple parties. This reduces friction in the movement of data, provided industry systems are able to connect effectively and organisations maintain accurate master data and timely status updates," he said.

Jansen said another challenge facing the industry was the increasingly technical nature of the perishable export environment.

"Farmers, exporters, cold stores and logistics service providers are all operating in an environment where digital integration is becoming a requirement rather than an option," he said.

The next step

"As the TITAN and eCert platforms continue to evolve, industry participants need systems that can adapt to changing data requirements, integration standards and electronic documentation processes. For organisations without dedicated IT resources or specialised software, keeping pace can become a significant challenge."

He said logistics platforms and software providers had an important role to play in helping industry participants connect their day-to-day operations with the growing electronic certification ecosystem.

"Technology should simplify compliance and improve efficiency, not create additional administrative burdens. The role of software providers is to make these integrations as seamless as possible so that exporters and logistics operators can focus on moving cargo rather than managing data," said Jansen.

He said ShipShape's recently introduced Export Booking Module had been developed with this objective in mind, integrating perishable sea-export bookings with TITAN and eCert to eliminate duplicate data capture and provide a single workflow for users. LV

Opinion Piece

Southern Africa's perishable trade growth hinges on efficient logistics

By Shane Brennan, vice president: global policy, projects and partnerships, Global Cold Chain Alliance (GCCA)

As we pass the midpoint of 2026, the global food supply chain remains resilient in the face of major disruptions domestically and in global trade. But we must not take this resilience for granted, and it is vital that industry and government work together to deliver the regulatory changes needed for safe and secure growth across our food industry.

Over recent years, southern Africa has experienced strong increases in perishable goods trade, a welcome trajectory for both economic strength and food supply resilience.

This has been made possible by temperature-controlled logistics. We are proud that cold chain operators have responded to demand with investments in temperature-controlled facilities and fleets, specialist skills and future-facing operations to meet customers' evolving needs.

Over the past six months, the growth path has been knocked off course by the disruption and uncertainty experienced by supply chains throughout the world. Trade costs have increased dramatically, driven not just by tariffs, but by an energy shock, shortages of food and fertiliser and military conflict in the Middle East. Africa has once more found itself in the middle of a great power trade tussle, with US action and Chinese and European counteraction.

These substantial changes are causing disruption and uncertainty, but also opening new opportunities, which nations are exploring through agreements such as South Africa's new Stone Fruit Trade Protocol with China and a reframed trading relationship with both the United States and Europe.

Southern Africa's ability to seize emerging opportunities to grow the trade in perishable produce hinges on efficient and reliable logistics and practicable, effective border processes. While the region's cold chain is successfully expanding, modernising and investing, border processes remain under resourced, cumbersome and inconsistent.

Southern Africa can lead the way by embracing a new approach that utilises technology to remove the friction points in current controls and inspections. An approach that would strengthen oversight and streamline processes.

By investing smartly in much-needed modernisation and digitisation, borrowing from global best practices and pushing ahead, African countries could build borders that make food trade safer, more resilient and far more efficient.

The reality is that overly people-reliant and paper-based trade processes are a nineteenth-century solution to a twenty-first-century challenge. Harnessing digital technologies would reduce delays, boost trade and improve security and sovereignty.

Food and beverage sector buoys business sentiment

South Africa's food and beverage manufacturers are emerging as one of the brightest spots in the country's manufacturing sector, demonstrating resilience and helping to lift overall business confidence despite rising costs and supply chain disruption.

According to the latest Q2 Absa Manufacturing Survey, manufacturing confidence increased by one index point during the second quarter, making it the only major sector tracked by the Bureau for Economic Research (BER) to record an improvement in sentiment. Much of that optimism is driven by the strong performance of the food and beverage sector.

Sachin Chanderdhev, sector specialist for manufacturing at Absa Business Banking, said food and beverage manufacturers continued to outperform many other manufacturing subsectors despite facing the same cost and logistics pressures affecting the broader economy.

"The biggest positive sentiment is in the food and beverage market," he said. "It is a resilient sector because consumers still need to eat. They may cut back on other spending, but food remains a necessity."

The sector's strength is also reflected in capacity utilisation levels, with food and beverage plants remaining among the busiest in the country for several consecutive quarters. Manufacturers have maintained production volumes even as they navigate rising raw material costs, higher electricity tariffs and uncertainty across global supply chains.

For South Africa's cold chain industry, the performance of the food and beverage sector is particularly significant. Strong production activity translates into continued demand for temperature-controlled storage, transport and export services.

However, manufacturers are having to work harder to maintain momentum.

The survey found that input costs increased sharply during the quarter following a rise in global crude oil prices, which pushed up the cost of raw materials and other production inputs. Manufacturers have responded by renegotiating pricing agreements with customers and reviewing inventory strategies to protect supply continuity.

At the same time, logistics constraints continue to add pressure. Although South Africa's ports have shown signs of improvement, inefficiencies still force manufacturers to carry higher inventory levels and tie up additional working capital.

"When logistics and port inefficiencies exist, manufacturers need to hold more stock and order much earlier," said Chanderdhev. "That places pressure on working capital and cash flow."

For food and beverage producers, where product freshness, shelf life and delivery schedules are critical, efficient logistics networks remain essential. Delays at ports, disruptions to shipping routes and rail constraints can all affect supply chain performance and export competitiveness.

Despite these challenges, food and beverage manufacturers have shown a remarkable ability to adapt. Chanderdhev said the sector had developed a strong level of resilience after years of navigating disruptions ranging from Covid-19 and global shipping shocks to energy challenges and geopolitical instability.

Manufacturers have become quicker to respond to emerging risks.

Looking ahead, Chanderdhev expects food and beverage manufacturing to remain one of the strongest-performing sectors through the remainder of the year. LV

'SA a world leader in customs processing'

South Africa's cold chain sector currently has sufficient capacity to support growing export volumes, including the country's growing citrus volumes, but ongoing logistics challenges continue to place pressure on the efficient movement of perishable cargo.

According to Andy Connell of A-Bar-C Services, the industry has invested significantly in cold storage infrastructure over recent years and is well positioned to accommodate current and future growth.

"We have enough cold chain capacity at the moment and there is still room to manoeuvre," he said. "Whether it is fruit exports during the peak fruit seasons or frozen products, the storage capacity is there."

Connell said several industry players had continued to invest in new facilities despite difficult trading conditions. This comes as South Africa is now the largest citrus exporter by volume, while other sectors, such as poultry, are also showing exponential growth.

The investments being seen are also coupled with ongoing discussions about how facilities can be better utilised and how the industry can continue to grow.

While storage infrastructure is not currently a major constraint, Connell believes the biggest challenge facing the cold chain industry remains logistics fluidity, particularly around port operations and the movement of export cargo.

"The issue is not capacity. The issue is predictability and consistency," he said. "The port and shipping lines cannot always provide reliable schedules and stack dates, which makes it difficult for exporters and logistics providers to plan cargo movements effectively."

> "Everyone expects the port to perform miracles, but the industry also needs to adapt its logistics planning.
> – Andy Connell

According to Connell, congestion is often exacerbated when exporters delay deliveries until the final days before vessel departure, placing unnecessary pressure on terminals.

"Everyone expects the port to perform miracles, but the industry also needs to adapt its logistics planning. If cargo is only delivered on the last possible day, it creates pressure that the port cannot reasonably be expected to absorb."

Despite these operational challenges, Connell believes South Africa compares favourably with many international competitors when it comes to cold chain compliance and digital systems.

He said the country's integration between industry, regulators and service providers had created a highly efficient environment for export documentation, inspections and cargo processing.

"With the PPECB systems and the level of digital compliance that has been implemented, South Africa is probably ahead of many of the world's major producers," he said.

"We are world leaders in areas such as customs processing, shipment bookings and digital documentation. Much of the customs clearing process can be completed electronically, provided there is connectivity."

While the country's cold chain infrastructure and digital systems continue to perform well, Connell warned that rail remained a significant concern for the long-term competitiveness of fresh produce exports.

He said the economics of fruit transport made it difficult for rail to compete with established bulk commodity and automotive traffic, which continue to receive priority due to their scale and year-round volumes.

"Transnet Freight Rail naturally focuses on commodities such as iron ore and coal because they generate substantial revenue and operate consistently throughout the year," he said. "Automotive freight also benefits from regular, predictable volumes. Fruit is seasonal and cannot compete on the same commercial basis."

The deterioration of rail means substantial investment requirements before it can become viable for fruit.

"The investment required is enormous and the returns are very long term. Even if someone wanted to enter the market today, it would take years before the necessary infrastructure and equipment were in place." LV

Feature by Liesl Venter and Ed Richardson

New multimodal corridor to link southern African countries

The African Development Bank is supporting the development of a multimodal transport corridor linking Botswana, Mozambique and Zimbabwe through a deep-sea gateway of a new port at Techobanine, Mozambique.

Situated 70km south of Maputo, Techobanine will be designed to initially handle up to 200 million tons of diversified cargo a year.

The plan includes a heavy-haul railway line linking the three countries.

Feasibility studies funded by the AfDB and the New Partnership for Africa's Development (NEPAD) are expected to be completed by December 2029.

According to the request for proposal, the project will also consider the corridor's potential as a driver of regional economic and social development.

"The studies will include market analysis to identify business opportunities along the corridor, financial models, climate risk assessments, gender analysis and a green port assessment to evaluate the project's environmental sustainability and social impacts.

"This project is expected to facilitate trade, stimulate industrialisation and enhance regional integration. An initial prefeasibility study indicated potential for substantial economic returns.

"The project economics will, however, need to be revisited to bring on board wider expected benefits besides mining, which may not have been emphasised at the pre-feasibility stage, including potential of agriculture, manufacturing and tourism."

> "National Railways of Zimbabwe, Botswana Railways and CFM plan to invest $10m in upgrading the railway line between Chicualacuala, Dabuka and Bulawayo.

Plans for the corridor date back to 2011, when the three governments signed a Memorandum of Understanding (MoU) for the development of a deep-sea port at Techobanine and a heavy-haul railway linking the three countries.

The MoU was renewed in April 2022, reaffirming the countries' commitment to the project.

"The project gained significant momentum with the recent successful tripartite technical ministerial meeting held on August 2, 2024," according to the tender document.

The transport ministers from Mozambique, Zimbabwe and Botswana endorsed a joint report to be presented to the Heads of State and Government.

The report outlines a collaboration between National Railways of Zimbabwe (NRZ), Botswana Railways and CFM (Mozambique Ports and Railways) to invest $10 million in upgrading the railway line between Chicualacuala, Dabuka and Bulawayo (Limpopo Line).

"This marks a significant milestone in the collaborative efforts to upgrade existing railway infrastructure within the Ponta Techobanine Project framework," the document states.

The line was closed between January and May for extensive repairs. ER

Zambia helping to strengthen regional connectivity

Zambia is positioning itself at the centre of southern Africa's transport network as investment gathers pace across several major corridor projects linking the country to ports on both the east and west coasts.

Speaking at the fifth Land-Linked Zambia conference in Lusaka recently, Africast chief executive and conference organiser Chimwemwe Nyirenda said Zambia should no longer be viewed as a landlocked country but rather as a "land-linked" nation connected by six strategic transport corridors.

"It is fair to say that Zambia is at the centre of transport corridor development in the region," he said. "We are at the centre of the $1.4 billion TAZARA revitalisation project and the Lobito Corridor project. We also have developments around the Beira, Nacala and North-South corridors, and, of course, the Walvis Bay-Ndola-Lubumbashi Corridor."

Nyirenda said several major infrastructure projects aimed at strengthening regional connectivity reflected Zambia's commitment to developing its transport corridors. Among them is the upgrade of the TAZARA railway, the 1 860km line linking the Port of Dar es Salaam in Tanzania with Kapiri Mposhi in Zambia. The project includes the rehabilitation of track, stations, tunnels and bridges, as well as the construction of additional infrastructure along the corridor.

> " Zambia should no longer be viewed as a landlocked country but rather as a 'land-linked' nation connected by six strategic transport corridors.
>
> – Chimwemwe Nyirenda

Once completed, the upgrade is expected to increase annual freight volumes on the railway to 2.4 million tonnes from the current 100 000 tonnes.

He also pointed to improvements around the Kazungula Bridge, which spans the Zambezi River between Zambia and Botswana and has strengthened one of the region's key freight routes, as well as the proposed $2bn Kafue-Lion's Den railway. In April this year, the governments of Zambia and Zimbabwe signed a memorandum of understanding to construct the 311km railway line linking Kafue in Zambia with Lion's Den in Zimbabwe.

According to Nyirenda, these and other investments are critical if Zambia is to achieve the government's ambitious production targets of three million tonnes of copper a year by 2031, alongside annual production of 10 million tonnes of maize, one million tonnes of wheat and one million tonnes of soya beans.

"The transport corridors that are bringing in people and exporting minerals as well as commodities should be ready with technology, capacity and, of course, efficiency," he said.

Nyirenda also pointed to the opportunities presented by the African Continental Free Trade Area (AfCFTA), which, citing World Economic Forum estimates, is expected to increase intra-African freight demand by 28%. He said this would create demand for an additional two million trucks, 100 000 rail wagons, 250 aircraft and more than 100 vessels, while significantly expanding the continent's logistics market. LV

Major investments will streamline cargo flow

Millions are being invested in southern African freight corridors, funded by both government and the private sector through public-private partnerships.

Major investments include $1.4 billion on the Maputo corridor to Gauteng and $6bn on the Lobito rail and port project.

Three of the biggest projects are in Mozambique.

The multimodal Maputo Logistics Corridor connects Maputo port to the Kingdom of Eswatini and the South African provinces of Mpumalanga, Limpopo and Gauteng.

It is one of the focus areas of the 2022 Maputo Port Masterplan, which sees volumes growing to 42 million tons a year in 2033, and 54m by 2043.

Investment in the port includes the expansion of the bulk terminal to 16 million tons, ongoing investment in the DP World container terminal to handle 530 000 TEUs a year, capacity expansion works at Grindrod's magnetite and coal terminal to 12 million tons, and the progressive improvement of efficiency along the logistics corridor through coordinated interventions at key nodes such as Km4, Kudumba and Trans African Concession, which manages the N4 Toll Route on the Maputo Corridor.

"Our focus remains on building a competitive, integrated and sustainable corridor that supports Mozambique's long-term economic development," said Osório Lucas, chief executive officer of MPDC when announcing that the port had handled record volumes in 2025.

> Our focus remains on building a competitive, integrated and sustainable corridor that supports Mozambique's long-term economic development.
>
> – **Osório Lucas**

To the north of Mozambique, investment in the Beira Corridor includes ongoing dredging of the port and access channel, rebuilding of the Machipanda railway line and the rehabilitation of the N6 road.

A consortium of private companies is investing $160m in the construction of an access road to the Port of Beira and the Dondo Logistics Terminal through a public-private partnership, according to a government statement.

Developments on the Nacala Corridor, which runs through Malawi to Zambia, include extensive upgrades to the Port of Nacala and the shared rail line.

Initially built to move coal, the line is now used for agricultural imports and exports as well through the establishment of a logistics park.

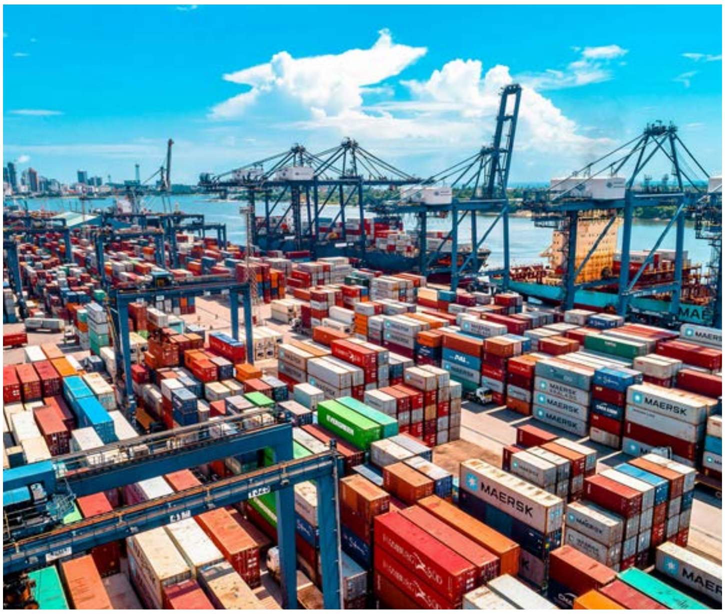
In February 2026, the Mozambican government announced plans to concession the expansion and development of the port.

South African corridors include North-South, linking Durban with the rest of Africa; the Musina Corridor through Beitbridge to Zimbabwe; and the Eastern Cape corridor between the deep-sea port of Ngqura and Gauteng.

Developments on the Durban-Johannesburg corridor include a number of logistics parks and multimodal transfer facilities.

The Musina Makhado Special Economic Zone is being developed as a logistics and processing hub on the South Africa/Zimbabwe border at Beitbridge.

Plans to upgrade the rail link between Ngqura and Gauteng have been on the drawing board for some time. ER



Container terminals across southern Africa are expanding capacity as governments and the private sector invest in more efficient regional freight corridors.

Maputo making inroads in rail growth plan

A plan is coming together for the Maputo Port Development Company, which increased rail volumes from 9.7 million tons in 2024 to 11.7 million tons in 2025 – a 17% growth.

There have been three years of sustained growth in rail volumes – 8% year on year in 2023, and 7% between 2023 and 2024.

The company describes rail as "a central pillar of the Port of Maputo's sustainability strategy".

In 2024, the African Development Bank (AfDB) made a $40m corporate loan to the state-owned enterprise Portos e Caminhos de Ferro de Moçambique EP (CFM), the Mozambique rail and port authority, for the purchase of rolling stock and locomotives for the Ressano Garcia rail link between Maputo port and South Africa.

This has supported growth on the corridor.

In 2025, MPDC's direct operations also reached a record level, with 15.2 million tons handled, representing 6.4% year-on-year growth.

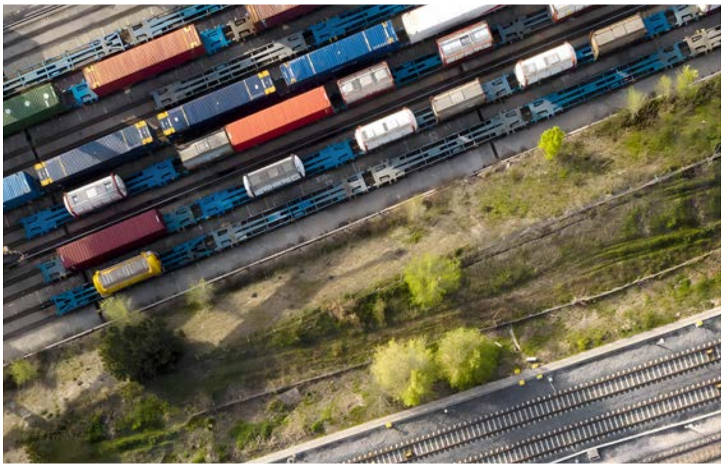
"This result reflects the impact of sustained investments in infrastructure, systems and human capital, as well as ongoing improvements in operational efficiency," according to a company statement.

> "The goal is for rail to transport 45% of the cargo moving through the port and road 55%, which reflects increased volumes through the container terminal.

The goal is for rail to transport 45% of the cargo moving through the port and road 55%, which reflects increased volumes through the container terminal.

In May 2025, DP World initiated a $165m project to double the capacity of the Maputo Container Terminal.

DP World describes the investment as part of a long-term strategy to meet global trade demands, create thousands of new jobs and contribute to Mozambique's economic growth.



Moving more freight from road to rail is gaining momentum as countries like Mozambique invest in transport infrastructure.

"The project will significantly enhance capabilities of the port, positioning Maputo as a trade and logistics hub for southern Africa and opening a gateway for larger container ships," according to a statement issued at the sod-turning ceremony.

Mohammed Akoojee, DP World CEO and managing director for Sub-Saharan Africa, said: "The container terminal expansion signifies our intent to strengthen Mozambique's economic growth, together with the Government of Mozambique and our partners in the MPDC.

"The Port of Maputo is at the heart of transforming trade on the African continent, as it has the potential to connect the land-locked countries of southern Africa to the rest of the world.

"This investment reinforces Mozambique's role as a key cargo gateway, improves its global competitiveness and positions the country as a dynamic business hub. By working hand-in-hand with our partners, we are committed to developing innovative end-to-end logistics solutions that reinvent trade on the south-eastern coast of Africa." ER

Road still king on N3 corridor

Private operators of the Durban-Johannesburg rail corridor will have their work cut out to reverse the dominance of road.

The trend is for freight on the N3 corridor to move from rail to road, which now has an estimated 87% share of the volumes.

In addition to delays caused by theft, lack of maintenance and ageing rolling stock and locomotives, the line has structural challenges.

The rail route is 690km, or 140km (25%) longer than the 550km road link.

While investment in rail has stagnated, the road has been steadily upgraded.

However, with 8 500 to 13 500 vehicles a day on the route, around half of which are heavy trucks, there are frequent delays due to congestion and accidents.

Further strain will be put on the corridor as global e-commerce platforms such as Shein, Amazon and Temu move distribution from air to ocean freight.

> **87%** The current share of road freight on the N3 corridor.

According to operators, it takes an average of one to three days to move a container between the port and Gauteng, while for rail it is three to five days.

The advantage of rail is that it is "significantly cheaper for large volumes", according to V&S Freight.

This excludes the additional costs and time to move the freight from the rail terminal at City Deep to the final destination.

Gavin Kelly, chief executive officer of the Road Freight Association, does not see the trend being reversed any time soon.

"The first important concept to understand is that the customer (cargo owner) decides what mode of transport (air, rail, road or sea) will be used," he told *Freight News*.

"The decision is based on service (transport) reliability, efficiency, consistency, applicability, security and cost.

"Until rail can effectively offer an alternative to road that consistently 'ticks' the above requirements in a freight logistics system, rail will be shunned and cargo owners (customers) will decide what suits their needs best.

"Road freight transporters (operators) do not decide which mode of transport is used – but through their calibre of services offered, they ensure customers choose road freight again and again." ER

Connect

Port of Beira

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Road Distances

Ports	Harare ZIMBABWE	Bulawayo ZIMBABWE	Lusaka ZAMBIA	Kitwe ZAMBIA	Lubumbashi DRC	Blantyre MALAWI	Lilongwe MALAWI
BEIRA	559	726	1 054	1 370	1 600	812	950
DURBAN	1 711	1 454	2 380	2 707	2 611	2 323	2 678
DAR ES SALAAM	2 634	3 028	1 985	1 951	2 290	2 031	1 667
WALVIS BAY	2 297	1 856	2 078	2 294	2 480	2 907	2 752

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Lobito transforming regional mineral trade

It is over a decade since a *Freight News* team overheard a conversation in a Lusaka hotel about plans to revive the 1 739-kilometre rail link between the Copperbelt and the Port of Lobito.

Naturally, we introduced ourselves and since then have been following developments with interest.

Today, the Lobito Corridor is living up to the vision of transforming regional mineral trade.

The figures show it is diverting copper and cobalt exports from the traditional eastern and southern African ports to Angola's Atlantic port.

Volumes are projected to increase from 265 000 tons in 2025 to 1.5 million tons by 2030, and ultimately 4.6 million tons a year, proving the sceptics wrong.

To be fair, the early stages of the revitalisation of Lobito and the railway were not made public.

In 2006, China provided funding (and the construction company, labour, etc) for the reconstruction of the Benguela Railway line through an agreement with the Angolan government.

Quay rehabilitation and extension to 1 122 metres was done between 2008 and 2010, followed by extension of the container terminal and dredging to 14.7m.

Things started happening in 2022, when the Angolan government awarded a 30-year concession to the Lobito Atlantic Railway Consortium (LAR), consisting of Mota-Engil, Trafigura and Vecturis.

It was signed in July 2023, and the first "experimental" train carried 960 tons of copper from Kolwezi in the Democratic Republic of Congo (DRC) to Lobito in January 2024.

LAR secured $753m in financing from the US International Development Financial Corporation (DFC) and the Development Bank of Southern Africa (DBSA).

The corridor now has strategic importance, providing Western countries with access to the cobalt and copper needed for electric vehicles and batteries in competition with China, which has largely secured the routes to the eastern seaboard.

The United States has mobilised over $4 billion toward the Lobito Corridor infrastructure projects, which includes a direct $553m loan for the railway.

The European Union has separately mobilised approximately €2bn in funding and support for the corridor, bringing total investments by key international players to over $6bn.

The DBSA will contribute another $200m.

Funding is needed to handle projected growth in volumes, with plans for a greenfields Zambian rail link and extension into the DRC well advanced.

For cargo owners, the maths is simple – it offers a seven- to eight-day transit time compared to 25-50 days to Durban, with fewer border delays, and it is less than half the distance, all of which adds up to an estimated 30% to 40% cost saving. ER

Feature by Liesl Venter and Ed Richardson

Bullish outlook for the sector

Project cargo operators across southern Africa are reporting growing optimism as investment in energy, mining and infrastructure increases.

From major LNG developments in Mozambique and Namibia's rapidly expanding oil and gas sector to new mining projects in Zambia, Zimbabwe, Botswana and the Democratic Republic of Congo, industry experts say the outlook for project cargo over the next two years is among the strongest seen in recent years.

"Project cargo is definitely on the up," said logistics specialist Kevin Melnick.

"It is a very buoyant market. This isn't something we're seeing in just one country or on one continent. Demand for large-scale projects is increasing globally and Africa is very much part of that growth."

Energy remains one of the biggest drivers. Namibia's offshore oil discoveries, the anticipated restart of major LNG developments in northern Mozambique and continued investment in renewable energy projects are creating sustained demand for heavy-lift, breakbulk and oversized cargo transport.

Mining is providing another significant boost. With Zambia and the DRC on track to increase mining output significantly over the next few years, a healthy pipeline of projects requiring specialised logistics planning and execution is coming together.

> Demand for large-scale projects is increasing globally and Africa is very much part of that growth.
>
> – Kevin Melnick

Athol Emerton, managing director of LBH Mozambique, believes the sector is entering a sustained growth phase.

"As infrastructure improves and delayed projects resume over the next two years, demand for breakbulk and project cargo logistics will keep increasing," he told *Freight News*.

"Beyond what's already under way, the LNG restart in northern Mozambique – Area 1, Rovuma and Coral – will be the single biggest driver of project cargo demand in the region over the coming years."

He said major transport corridor developments, including the Lobito and revitalised Nacala corridors, together with West African iron ore and rare earth projects, would continue generating significant project cargo volumes.

"The three industrial sectors that will determine how quickly Africa develops are energy, mining and infrastructure," said Emerton. "But without infrastructure development, the first two will remain in the ground."

While demand continues to strengthen, the industry still faces significant operational challenges.

Unlike many other regions, Africa continues to contend with fragmented customs systems, differing regulatory requirements and inconsistent border procedures that can delay high-value project cargo movements. "There is still far too much red tape," said Melnick. "We don't have a harmonised customs environment across the continent. Duties, taxes and customs procedures differ from country to country, so cargo is still held up at borders."

He said successful project execution continued to depend on working with experienced local partners who understand country-specific regulations and can navigate often complex approval processes.

Infrastructure constraints also remain a concern, with ageing roads, limited rail capacity, bridge restrictions and port congestion continuing to affect route planning for oversized cargo.

Global geopolitical tensions are adding another layer of complexity. LV

Top opportunities over next five years identified

For project cargo logistics service providers, big is not always best.

Smaller projects may require larger numbers of processing plants, crushers, mills, smelters, refinery modules, power equipment, heavy transformers, rail systems and other oversized equipment than mega developments.

Among the top opportunities over the next five years have been identified as Simandou (Guinea), Lobito Refinery (Angola), Mingomba Copper (Zambia) and the wider Lobito Corridor industrialisation programme.

The projects combine multibillion-dollar capex with long inland heavy-haul routes and recurring demand for oversized equipment imports.

The $15-20 billion Simandou Iron Ore Expansion includes the transport of crushing plants, processing facilities, stacker reclaimers, heavy-haul rail systems, ship loaders and power generation equipment.

It is described as the largest single infrastructure and mining investment in sub-Saharan Africa.

> “The Lobito Refinery is designed to process 200 000 barrels a day, strengthening regional fuel security.

Cargo is expected to be landed in the port of Morébaya on the Morébaya River in southern Guinea.

A 650-kilometre railway will be built to link the port with the Simandou mountains, and the port will be configured to handle 120 million tons of ore a year.

The $6.6bn Lobito Refinery project is designed to process 200 000 barrels a day.

Construction has stalled due to funding constraints at around 23% completion.

Sonangol intends retaining a 51% majority stake.

Neighbouring countries including Zambia (which holds a 26% stake) and Botswana are reported to be negotiating for equity shares to ensure regional fuel security.

Located in Zambia's Copperbelt region near the border with the Democratic Republic of Congo, the Mingomba project is expected to produce more than 300 000 tons of copper a year at full capacity.

KoBold Metals has officially broken ground on the mine.

Production is targeted for the early 2030s, with major construction expected to accelerate after shaft sinking begins.

Backed by high-profile investors including Bill Gates and Sam Altman, KoBold says it is deploying artificial intelligence to accelerate exploration and development timelines in a sector traditionally defined by long lead times and high geological uncertainty.

In South Africa, the platinum group metals sector is undergoing a $20bn-plus expansion at Sibanye-Stillwater, Tharisa and Eastern Platinum as mature open-pit operations move to underground mining. ER

Large-scale oil refinery developments are expected to remain a key driver of project cargo demand across Africa over the coming years.

TOP 10 MINING, PROCESSING AND MANUFACTURING PROJECTS IN AFRICA (2026–2031)

PROJECT	COUNTRY	VALUE (USD)	TARGET START/ RAMP-UP
South African PGM Processing and Underground Expansions	South Africa	$20bn+	2026–2031
Lobito Refinery	Angola	$6.6bn	2028
Mingomba Copper Mine	Zambia	$2.3–2.5bn	2027–2031
Manhize Steel Plant Expansion	Zimbabwe	$2bn	2026–2030
Lithium processing plants	Zimbabwe	$1–2bn+	2026–2030
Longonjo rare earth mine	Angola	$217m	2026–2028
DRC Copper-Cobalt Refining Hub Projects	DRC	$1–3bn combined	2026–2031
Tanzania Nickel and Battery Metals Projects	Tanzania	$1–2bn	2027–2031
Lofdal rare earths project	Namibia	$400m	Seeking funding


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Additional routing options boost export access

Africa is entering a new project cargo investment cycle, with major developments in LNG, mining, renewable energy and industrial infrastructure driving demand for heavy-lift and specialised logistics. As governments and private investors commit billions of dollars to projects across the continent, the sector is preparing for a pipeline of increasingly complex cargo movements.

"Africa is once again becoming the focus of resource development, from bulk projects on a truly massive scale, like the Guinean iron ore developments, to the almost 'boutique' but strategically important rare earth and platinum group metals (PGM) projects," said Athol Emerton, managing director of LBH Mozambique.

Speaking to *Freight News*, he said several major infrastructure developments were expected to reshape project cargo flows. "The Lobito Corridor in Angola, renewed momentum on the Nacala Corridor and the continued development of Namibia's transport corridors are creating additional routing options for project cargo while improving access to export markets for bulk minerals."

South Africa's terminal upgrade programme and the long-awaited introduction of private rail operators are also boosting confidence. In Mozambique, the planned expansion of the Port of Maputo and growing cargo volumes along the Maputo Corridor demonstrated the value of integrated corridor development, said Emerton.

> "The future project scenario in Africa needs careful focus and country-specific knowledge.
> – Athol Emerton

Similar initiatives are under way in West Africa, where multiple corridor projects are expected to unlock future project cargo movements and support mineral exports.

"I am really excited about the future project scenario in Africa, although it does need careful focus and country-specific knowledge. We have been involved in the LNG projects in Afungi since handling the first exploration vessels back in mid-2008, and it has been rewarding to support such a broad range of project logistics as the development has progressed. It is arguably the biggest project under way in Africa," he said.

That optimism is reflected in growing project cargo activity across the continent. According to Emerton, volumes are increasing as investment gathers pace.

Heavy-lift cargo movements are expected to increase as investment in ports, rail and transport corridors improves access to projects across Africa. Photo: LBH Mozambique

"There are only two frontier continents left with real scope for resource exploration – Africa and Antarctica. And it's far too cold down in the latter, so let's focus on warm, friendly Africa!" he quipped.

The sector, however, is not without challenges. "In Africa, logistics for these massive projects demands a practical response: corridor capacity, port productivity, customs efficiency and multimodal connectivity all need to improve together. This means dialogue between any country's bureaucracy and resource project investors needs to be open and pragmatic at all times," said Emerton.

"I fear there is often great political and investor enthusiasm to unlock Africa's large resources with projects, but the momentum slows at a practical level through complex bureaucracy, from customs regimes to heavy-lift equipment permitting."

Practical constraints often extend well beyond ports and terminals. A country may have a modern, efficient port, but a damaged bridge several hundred kilometres inland or ageing road infrastructure can quickly become the weakest link in the logistics chain. Successfully executing complex project cargo movements therefore requires detailed local knowledge and careful planning across the entire transport corridor.

Emerton said demand for breakbulk and project cargo logistics would continue to grow as infrastructure improved and delayed projects moved forward over the next two years. LV

Risks of transporting giant lithium batteries underestimated

The authorities are not paying sufficient attention to establishing rules and regulations for the safe transport of giant lithium battery arrays being installed in solar and wind farms to provide grid stability, according to Carl Webb, managing director of Project Logistics Management (PLM).

In South Africa, lithium-ion batteries are classified as Class 9 hazardous materials under SANS 10228.

"Class 9 is a category for hazards that don't fit neatly into other classes. In this case, lithium batteries pose a combination of chemical and energetic risks rather than flammability or toxicity alone," according to an Arrive Alive advisory on the transport of the batteries.

"Being Class 9 means that any significant shipment of lithium-ion batteries (for example, bulk batteries or batteries not installed in equipment) must adhere to strict transport requirements, including the use of appropriate labels, documentation and packaging.

"It is a very big problem area," Webb told *Freight News*.

"We are getting orders to move 400 containers of lithium batteries weighing between 35 and 43 tons each, to different parts of the country.

"The problem there is that none of the abnormal registered vehicles which can carry that weight are hazardous registered."

> "What the authorities and hauliers do not realise is that if a lithium battery comes off and ignites, there is no way of putting out the battery fire.
> – Carl Webb

The registration challenge is that the NaTIS system does not allow a vehicle or trailer to be registered as both abnormal and hazardous, he says.

This has implications for insurance claims, in addition to non-compliance with road regulations. "There will be very big problems if something goes wrong.

"Nobody seems to realise that. The port is quite happily loading these containers onto trucks and trailers that, firstly, are not registered, and secondly, are not built for the load.

"We had a 43-ton battery the other day loaded on a 30-ton trailer.

Large battery energy storage systems present new logistical, regulatory and safety challenges for heavy-haul transport operators.

"Trucks are going in without twist locks. They are getting loaded, with the battery just chained down."

The batteries also pose a hazard where they are being stored in transit, as well as at their final destination.

"What the authorities and hauliers do not realise is that if a lithium battery comes off and ignites, there is no way of putting out the battery fire.

"They do not realise the extent of the disaster that's going to happen, and it will happen."

Webb says project cargo operators and the Road Freight Association have been trying to address the risks with NaTIS for two years, without success.

"So, we're going to carry on with the situation until something happens, and when it happens, it is going to be a big disaster."

Webb is also concerned about the quality of the mainly Chinese vessels transporting the batteries to South Africa.

"At any one time you will have four or five Chinese vessels discharging in the harbour (Durban).

"The exporters use the cheapest possible boat that they can find."

The vessels' cranes often do not work, and offloading is haphazard, he adds. ER

Demand for heavy-lift capabiity

After several years of uncertainty, Africa's project cargo sector is beginning to show signs of recovery as previously delayed projects move into execution phase and new awards enter the market.

While activity remains uneven across the continent, demand is gradually improving, underpinned by investment in renewable energy, mining, power generation and infrastructure.

According to Kyle De Almeida, national project manager at Fr. Meyer's Sohn South Africa (FMS), these sectors are generating sustained demand for the movement of oversized and specialised cargo.

De Almeida said the global energy transition remained one of the biggest structural drivers of project cargo growth as countries invested in cleaner energy and electrification. Growing demand for critical minerals such as lithium, copper, nickel, cobalt and rare earth minerals is driving investment in new mining operations and the supporting infrastructure required to develop them.

"The continued volatility in global oil markets, particularly around price and supply stability, may accelerate the transition towards renewable energy, with greater emphasis on domestically produced sources such as wind and solar to enhance energy security and reduce reliance on external energy supplies," he said.

Kyle De Almeida

He added that global shipping lines were also investing in dedicated project cargo and specialised equipment divisions to meet growing demand for complex project logistics services.

Infrastructure investment gathering pace

While these trends are evident globally, De Almeida said South Africa was experiencing similar growth, with renewable energy, mining and infrastructure continuing to underpin demand for project cargo services.

"In the renewable energy sector, continued acceleration of renewable energy deployment is driving demand for the transport of wind turbine components, solar infrastructure and photovoltaic equipment. These projects require specialised heavy-lift capability, abnormal load transport and detailed route planning."

While mining continues to generate sustained project cargo demand, De Almeida believes South Africa's logistics reforms could become the next major catalyst for project cargo growth.

"South Africa is undergoing a major logistics reset supported by a R102 billion transport budget allocation, with a strong focus on rail recovery and private sector participation," he told *Freight News*.

"This shift will have a powerful impact on the mining sector and containerised cargo flows, as it directly influences export capacity, corridor efficiency and port performance. Opportunities for project cargo will be generated through rail network upgrades and expanded port infrastructure development, as these large-scale infrastructure programmes require the movement of heavy, oversized and specialised equipment."

With major rail, port and corridor projects moving from planning to implementation, De Almeida believes the outlook for project cargo is becoming increasingly positive.

Several strategic logistics projects are already gathering momentum, including the partnership between Transnet and International Container Terminal Services Inc (ICTSI) at Durban's Pier 2, upgrades to the Gauteng-eThekwini freight corridor, the development of the Ngqura manganese export corridor and plans to expand Richards Bay's dry bulk handling capacity. Together, these projects are expected to improve freight efficiency while creating significant demand for the transport of heavy equipment during construction and implementation.

Cost pressures persist

Despite the improving outlook, significant challenges continue to constrain growth across the sector.

According to De Almeida, rising fuel prices and increasing security surcharges are placing additional pressure on project logistics, driving up the overall cost of moving oversized and specialised cargo. As a result, investors are becoming more cautious, particularly when assessing projects in high-risk and remote regions across Africa.

Equipment availability is another growing concern.

"High-demand corridors offering transporters better commercial returns continue to attract relatively consistent transport capacity, while other routes are experiencing tighter vehicle availability and a reduced pool of reliable logistics providers," he said.

This imbalance is creating additional planning and scheduling challenges for project cargo movements across the region, particularly for projects requiring specialised equipment and carefully coordinated logistics.

While challenges remain, De Almeida believes the market is well positioned for further improvement.

"I expect a number of previously on-hold projects to commence if current market conditions stabilise over the next one to two months," he said. LV

PROJECT SPOTLIGHT

Recent Fr. Meyer's Sohn South Africa (FMS) projects reflect the growing demand for specialised logistics in the mining and renewable energy sectors.

Among them is the transport of equipment for a new silver mining project from South Africa to Australia, involving around 100 in-gauge containers and 21 out-of-gauge shipments, with the largest unit measuring five metres wide.

The company also managed the landside logistics for a 128 MW hybrid renewable energy project in the Western Cape, coordinating the movement of more than 600 containers through the Port of Cape Town and overseeing the full logistics chain from customs clearance and port operations to transport, craneage and on-site delivery.

PORT OF BEIRA

Road Distances

Ports	Harare ZIMBABWE	Bulawayo ZIMBABWE	Lusaka ZAMBIA	Kitwe ZAMBIA	Lubumbashi DRC	Blantyre MALAWI	Lilongwe MALAWI
BEIRA	559	726	1 054	1 370	1 600	812	950
DURBAN	1 711	1 454	2 380	2 707	2 611	2 323	2 678
DAR ES SALAAM	2 634	3 028	1 985	1 951	2 290	2 031	1 667
WALVIS BAY	2 297	1 856	2 078	2 294	2 480	2 907	2 752

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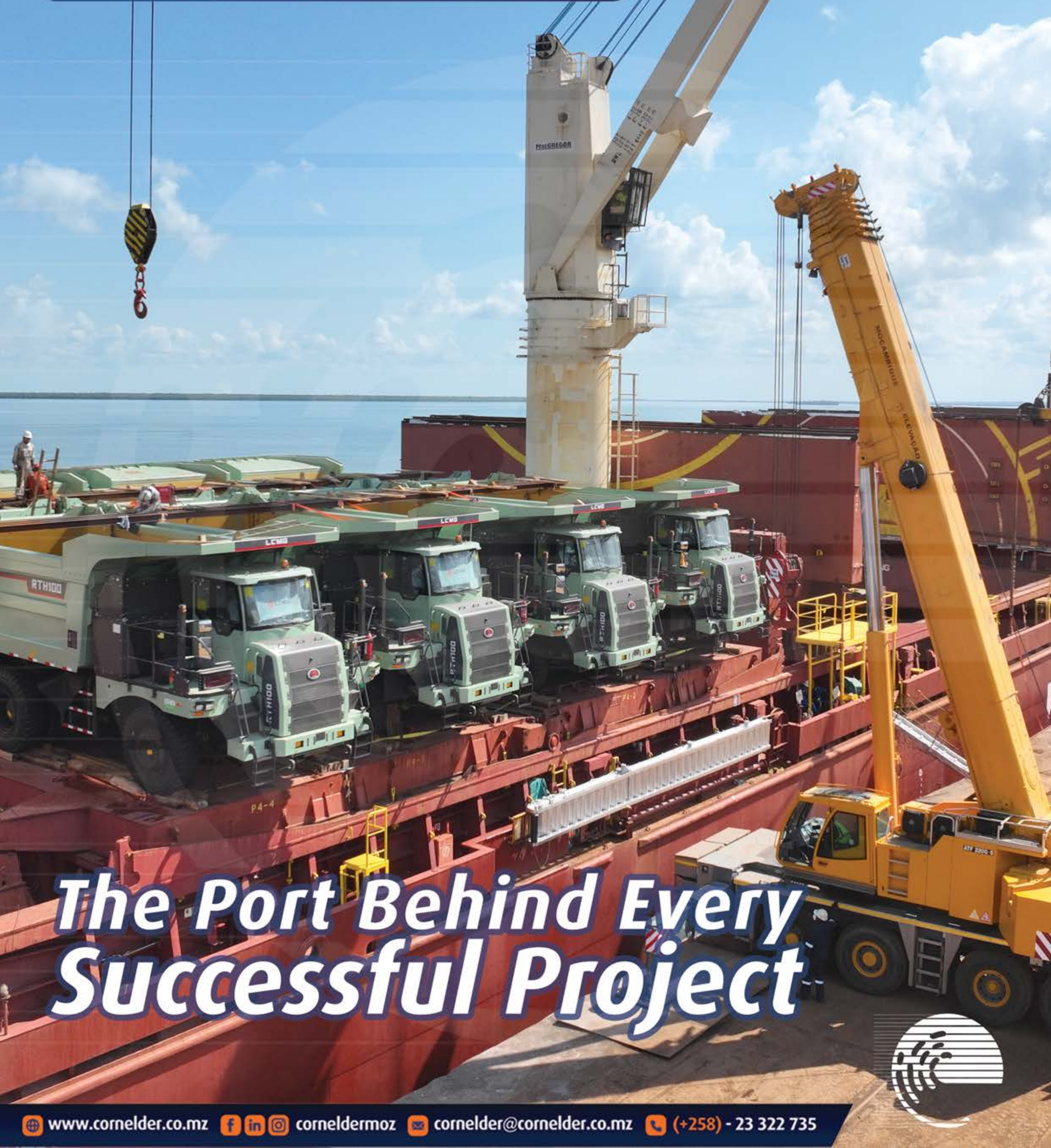

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Zimbabwe on a beneficiation drive

Zimbabwe's mining sector is driving demand for project cargo services for both mine expansion and beneficiation.

Mineral exports reached $3.4 billion in 2025, a 14% increase from the previous year.

At the same time, the government is enforcing a transition from bulk ore exports to high-value beneficiation.

In February, the government banned the export of raw minerals and lithium concentrates.

The ban includes all categories of unprocessed minerals – including lithium ore, chrome, nickel and platinum group metals.

> In February, the government banned the export of raw minerals and lithium concentrates, including all categories of unprocessed minerals.

Then, in April, the Zimbabwe cabinet approved the Minerals Value Chain: From Mining to Beneficiation, Industrialisation and Exportation framework.

Presented by Vice President Constantino Chiwenga, the plan was based on four pillars, President Emmerson Mnangagwa told a media briefing.

The first is mineral-specific architecture and mandatory standards, which sets out legally binding minimum processing standards, including mandatory requirements for the issuance of export permits.

Second is a decentralised network of specialised analytical hubs for mineral certification, which will be co-located at national universities/scientific institutions, with each institution serving as a dedicated referee for specific mineral clusters within the region.

The mine-to-market operational control system pillar will focus on smart tracking of mineral exports to secure value by preventing leakages and fraud through the adoption of a secure and real-time "mine-to-market" smart corridor.

Fourthly, new investors will be directed to eight specialised regional mineral hubs where they can share infrastructure and scale operations efficiently.

If rolled out successfully, the plan will attract large-scale investment in the mineral hubs, as well as in supporting infrastructure.

Mnangagwa said the four pillars would be supported by key enablers, including reliable energy and affordable power supply incorporating energy self-generation incentives for beneficiation projects.

Expanding mining projects and increased investment in beneficiation are creating new opportunities for project cargo specialists in Zimbabwe.

While the investments will require large-scale project cargo support, operators will want to see real progress before investing in equipment and resources.

An earlier mega government project, the Mines-to-Energy (Mapinga) industrial park value-addition complex along the Great Dyke, is reported to have stalled.

This is due to the main Chinese investor pulling out due to delays in land allocation and finance challenges, according to former Mines Ministry Permanent Secretary Pfungwa Kunaka.

It was to have included a lithium salt plant, graphite processing, nickel-chromium alloy smelter, nickel sulphate plant, coking facilities and two 300 MW power stations to support energy-intensive processing.

If more successful this time round, the Zimbabwean drive to add value to its minerals will see the region's ports bidding against each other for the project cargo business.

While Beira handles the bulk of exports, Durban is currently the primary gateway for heavy mining equipment.

It will face competition from Beira, Walvis Bay and possibly Maputo. ER

Clearing skills shortage adds to risks

An ageing (and retiring workforce), combined with the industry's seeming inability to attract and retain young talent, is affecting movers of project cargo.

"There's an issue in the industry; the knowledge and experience have gone," Carl Webb, managing director of Project Logistics Management (PLM), told *Freight News*.

"The majority of staff now in the clearing and forwarding industry are container orientated.

"Very few are project or breakbulk orientated.

"That is a problem because they cannot see the bigger picture," he said.

Delays in the movement of project cargo have been defined as a systemic project-delivery risk across the region.

A shortage of specialised clearing and forwarding skills adds to delays because customs clearance is more than an administrative task; it requires technical knowledge of customs regulations, trade documentation, tariff classification, valuation, permits and cross-border compliance.

In the SADC region, where shipments often move through several jurisdictions, limited access to experienced personnel can cause delays at every stage of the logistics chain.

The general skills shortage in the clearing and forwarding sector was raised at the inaugural Forwarding and Clearing Summit held in Johannesburg in June 2025.

Kgatile Nkala, executive manager for corporate services at the Transport Education Training Authority, said forwarding and clearing businesses "form the backbone of our trade logistics sector, yet many lack access to the training and development resources required to keep pace with global standards".

> "Delays in the movement of project cargo have been defined as a systemic project-delivery risk across the region.
>
> – **Carl Webb**

Challenges facing the sector have also been raised by Ingrid Du Buisson, chief executive officer of the Institute of Customs and Freight Forwarding (ICFF).

"In 2026, freight forwarding and customs compliance are already being dominated by tightened regulations, digital documentation mandates, real-time audits and geopolitical trade fragmentation.

"Forwarders face challenges in maintaining accuracy across multiple jurisdictions, integrating environmental and data governance rules and avoiding costly penalties for even minor errors.

"Compliance now affects routing, carrier selection, documentation timing and even customer communication," she says in an ICFF perspective article.

Research undertaken by the ICFF across the industry has identified and verified a list of critical skills that require development to address the challenges.

Most impact the movement of out-of-gauge cargo.

They include international shipping procedures, trade finance and documentation, customs documentation and compliance, customs regulations and updates, incoterms and trade agreements, freight management systems, forwarding control (logistics control), data and supply chain analytics, freight cost optimisation, dangerous goods regulations, client relationship (customer service), insurance and risk controller, cargo and warehouse controller, sales with regulatory structure and management and leadership. ER

Record Chinese EV exports constrain capacity

The switch to electric vehicles is reshaping breakbulk logistics through changing trade flows and the risks involved in transporting vehicles powered by large lithium-ion batteries compared to internal combustion engines.

According to the International Energy Agency (IEA), global EV sales are expected to reach 23 million in 2026, or 30% of all cars sold worldwide.

Electric models accounted for nearly one in 10 trucks sold worldwide in 2026.

Moving electric vehicles by sea and land requires specialised handling, stronger safety measures and compliance with changing regulations.

While rare, lithium-ion battery fires are difficult to extinguish.

Carriers are investing heavily in ro-ro vessels equipped with enhanced fire suppression systems, climate-controlled storage and onboard battery charging capabilities.

Carriers also have to manage capacity more closely due to the heavier vehicle profiles.

An electric hatchback weighs up to 400 kg more than a petrol equivalent, and an electric SUV up to 500 kg more.

There is also a major shift in supply lines.

Chinese automakers supplied 60% of electric cars sold worldwide, while European and North American automakers were each responsible for about 15% of global sales.

> “Chinese automakers supplied 60% of electric cars sold worldwide, compared to European and North American automakers’ 15% share.

Chinese electric car exports doubled to a record high of more than 2.5m.

This growth is continuing through 2026, causing bottlenecks due to capacity constraints.

In response, Chinese electric vehicle assembler BYD is investing in its own fleet of pure car and truck carriers.

Shippers are also using standard shipping containers to move EVs to Europe and other regions.

The market is fluid.

In response to the imposition of protective trade tariffs in markets such as the United States, European Union, Türkiye and Mexico, Chinese EV companies are building assembly plants in high-demand countries.

This involves logistics demands from international ocean shipping to local supply chain routing.

Landside logistics is also affected, with ports and distribution hubs investing in charging points.

EV battery packs add significant weight to finished vehicles. That can affect trailer capacity, axle weight distribution, equipment selection and routing.

A road or rail carrier that handles conventional vehicles may not have the right equipment to manage EVs at scale.

Factors that need to be considered include the vehicle state of charge, vehicle mass, fire safety protocols, secure parking and storage, and inspection of both the battery and vehicle at origin and destination.

Another impact, according to PWC, is that there is a steady decline in the volumes of components shipped by automotive manufacturers as electric vehicles require a fraction of the parts needed for an internal combustion-driven vehicle. ER

Agricultural machinery imports growing

A combination of government incentives, the need to feed and provide jobs for a growing population, and export opportunities is supporting growth in agricultural machinery imports, mainly on ro-ro vessels.

Incentives include VAT and/or duty-free importation of agricultural and agro-processing equipment.

They vary between the different southern African countries and by HS code.

Imports include new and used machinery.

Freight News has seen large harvesters and other equipment being shipped through Walvis Bay, Maputo and Beira.

While official figures are not readily available, regional studies indicate that South Africa remains the largest importer of high-value agricultural machinery, followed by Tanzania, Angola and Zambia.

South Africa is also the only significant manufacturing and assembly hub within the region.

Most remaining SADC members rely almost entirely on imported tractors, combines, irrigation equipment and precision farming technologies because local manufacturing capacity is limited, according to an INDEXBOX report.

The report forecasts moderated but sustained growth for the region's agricultural machinery market through 2035, driven by food security needs, gradual mechanisation and technology adoption.

However, the demand for breakbulk services is expected to be uneven and constrained by what it calls macroeconomic, regulatory and logistical challenges.

Stakeholders' success will depend on managing this fragmentation, understanding local value chains and balancing cost efficiency with sustainability.

South Africa accounts for 50% of the market, while Angola is the second-largest market at 12 000 units, reflecting strong post-conflict recovery and government efforts to revive commercial farming.

In its National Development Plan 2023 – 2027, the Government of Angola is focusing on increasing the production of both cereals and livestock to reduce reliance on imports and diversify the economy away from its dependence on oil, according to the Food and Agriculture Organisation.

Zimbabwe follows with 5 300 units and a 10% share, supported by demand from large commercial farms and a growing base of mid-sized enterprises.

The government estimates that the country has over 50 000 medium- to large-scale farmers but only 25 000 functional tractors, far short of the 40 000 required for commercial cultivation, according to the US International Trade Administration.

Around 35 000 small-scale farmers have begun receiving post-harvest and mechanisation equipment valued at $2.1 million.

The mix of crops is also changing, according to INDEXBOX. Broadacre crops such as maize, wheat and soy remain central, but specialised sectors are creating new demand.

These include high-value horticulture and vineyards, which require low-power, narrow-track models, and forestry operations that use skidders and forwarders.

Government and NGO smallholder mechanisation projects are also opening an emerging segment for versatile, lower-horsepower tractors, it adds. ER

Maputo invests in digital trade platform

Digitalisation is becoming an increasingly important part of project cargo logistics, as ports seek to improve coordination between the multiple parties involved in moving oversized and specialised cargo.

Against this backdrop, the Port of Maputo has appointed Kale Logistics Solutions to implement Mozambique's first Port Community System (PCS), another step in strengthening its position as a regional logistics hub.

> "Our Port Community System will create a smarter and more connected port ecosystem.
> – Osório Lucas

According to Osório Lucas, chief executive of the Maputo Port Development Company (MPDC), the PCS will create a smarter, more connected port ecosystem by enabling real-time collaboration and information sharing between stakeholders.

"By enabling real-time collaboration and information sharing among stakeholders, we are strengthening the Port of Maputo's role as a strategic gateway for regional and international trade," he said.

The PCS forms part of Mozambique's broader digital transformation programme and will provide a single digital platform linking shipping lines, terminal operators, customs authorities, transport providers, warehouses and other stakeholders. It is expected to improve information sharing, automate processes and enhance visibility across the port's operations.

The system will support vessel management, import and export cargo, truck and rail movements, customs interactions, warehouse operations and performance monitoring, while integrating with existing digital platforms, including the Customs Single Window and terminal operating systems.

Mozambique's Minister of Transport and Logistics, João Matlombe, said the initiative was a key step in modernising the country's logistics sector.

"Digital transformation is no longer an option; it is a prerequisite for competitiveness," he said. "As Mozambique's first Port Community System, this initiative positions the Port of Maputo as a pioneer and lays the foundation for the digital evolution of our national logistics network."

Lucas said the platform would help prepare Mozambique's logistics sector for the next generation of regional and international trade. LV

Flexibility key as shipping uncertainty prevails

The ongoing conflict in the Middle East continues to disrupt global shipping, with the International Maritime Organization (IMO) condemning attacks on commercial vessels transiting the Strait of Hormuz and warning that innocent seafarers are being placed in direct danger.

The heightened security risks, coupled with continued instability in and around the Red Sea, are forcing many project cargo operators to rely on longer but safer shipping routes to protect both cargo and crews.

Many vessels continue to bypass the Suez Canal in favour of the route around the Cape of Good Hope, avoiding areas where attacks on commercial shipping have occurred. While the diversion reduces security risks, it also adds significant transit time to already complex project cargo movements, affecting delivery schedules and increasing operational costs.

Project cargo experts *Freight News* spoke to said the longer voyages had reinforced the need for meticulous planning and closer collaboration between shippers, carriers and project logistics specialists. Operators are increasingly building greater flexibility into project schedules to accommodate delays, secure suitable vessel capacity and ensure critical cargo reaches project sites on time.

Despite the ongoing geopolitical uncertainty, demand for project cargo remains robust. Industry players say effective risk management and route planning have become essential to maintaining reliable supply chains in an increasingly unpredictable operating environment.

According to Lloyd's List Intelligence, more ships transited Hormuz in the last two weeks of June than in the previous month and a half. Traffic peaked on June 24 with 57 transits, which was roughly half the daily pre-war average. LV

Feature by Liesl Venter, Ed Richardson and Melisa Ntephea

Candidates need to hit the ground running

Producing workplace-ready graduates is becoming an increasingly important priority as the logistics and supply chain sector evolves and employers seek candidates who can contribute from day one.

According to Dr Nazmira Mohamed, programme coordinator for Boston's BCom Supply Chain Management, BCom Management Marketing and Postgraduate Diploma in Management, bridging the gap between classroom theory and real-world operations remains one of the biggest challenges facing higher education.

"Educational institutions have to continuously review and update their curricula to ensure graduates are equipped with the knowledge and skills required by industry," she said.

Mohamed added that sustainability and green logistics were becoming increasingly important, particularly as South Africa's logistics sector responded to changing customer expectations and environmental requirements. At the same time, training is shifting towards global logistics and compliance, reflecting the realities of international trade.

She said employers were increasingly looking for graduates with digital skills as logistics companies invested in warehouse automation, digital freight tracking and other technology-driven solutions. Companies are also placing greater emphasis on data interpretation, systems integration and digital tools, as automation reshapes supply chain operations.

> "Bridging the gap between classroom theory and real-world operations remains one of the biggest challenges facing higher education.
> – Dr Nazmira Mohamed

To address these changing requirements, Boston has incorporated modules such as Supply Chain Analytics, Digital Transformation of Supply Chain Operations, Global Logistics Management and Business Ethics into its curriculum.

"The freight sector's growth is being held back by skills shortages. Boston's balanced curriculum of commerce and supply chain modules directly addresses this by producing graduates who are ready for industry," she said.

Recruitment requirements are also evolving. Mohamed said employers were experiencing shortages of experienced transport economists, procurement specialists and professionals with expertise in freight forwarding and customs clearing. Analytics and costing skills are also in high demand, while planners, transport coordinators and transport specialists remain among the hardest positions to fill.

Mohamed said demand for training and skills development continued to grow, particularly across the retail and manufacturing sectors.

"We are seeing particular demand from retailers for training in areas such as inventory management to help reduce stock-outs and improve operational efficiency."

While demand for training is increasing, she acknowledged that smaller companies often struggled to afford advanced digital training, despite the growing need to equip employees with new technology skills.

Looking ahead, Mohamed expects training to place greater emphasis on project management, global logistics and digital technologies, while employers increasingly seek adaptable graduates capable of managing both local and international supply chain challenges.

She said skills development would increasingly combine online learning with practical South African case studies to better prepare graduates for the workplace. LV

AI proficiency a must-have

Training in the logistics industry should move beyond teaching only traditional transport, warehousing, inventory management and customs procedures to helping staff to master artificial intelligence (AI) tools, according to training specialists and managers.

"South African supply chain professionals face a unique storm: unpredictable port delays, fluctuating fuel costs and shifting consumer demands. Relying on manual spreadsheets and legacy systems means you're reacting to disruptions instead of predicting them," according to a training academy's website.

The needs are identified in the Transport Education and Training Authority (TETA) strategic plan 2025–2030.

It states: "In the forwarding and clearing subsector, automation in warehousing and cargo handling is boosting efficiency, reducing errors and improving demand management."

It recognises that the logistics industry is rapidly adopting AI to improve demand forecasting, route optimisation, warehouse automation, inventory management, predictive maintenance, customs documentation, risk management, supply chain visibility and customer service through AI chatbots.

"This technological advancement necessitates that all employees become proficient with technology. To stay relevant and competitive, employees must be upskilled to effectively collaborate with these new technologies," according to TETA.

Rather than being seen as a replacement for logistics professionals, AI should be treated as a tool which supports faster, data-driven decision-making while employees provide operational judgement, customer engagement and regulatory oversight.

> Modern training should focus on working alongside AI systems rather than competing with them.

Modern training should therefore focus on working alongside AI systems rather than competing with them.

Courses should integrate AI literacy, AI-assisted decision-making and practical digital skills that enable employees to work effectively with AI technologies while maintaining human oversight.

This is particularly important within the Southern African Development Community (SADC), where regional integration, cross-border trade and the implementation of the African Continental Free Trade Area (AfCFTA) are increasing the demand for digitally skilled logistics professionals.

AI is helping logistics companies improve efficiency, from optimising transport routes to automating warehouse and fulfilment processes.

Through the training, staff should be able to grasp how AI is utilised across logistics and supply chain activities, utilise machine learning models for demand forecasting and inventory control, analyse routes, optimise transport using AI-based techniques and automate decision-making processes within warehouses and fulfilment operations.

Training should emphasise practical workplace applications rather than programming.

The good news is that no major investment in hardware or software is needed.

It can start with open-source or free no-code applications which run on existing computer systems.

Tools such as ChatGPT, Microsoft Copilot, Excel AI and Perplexity can speed up the writing of delivery reports, preparing incident reports, summarising transport regulations, drafting customer emails and developing standard operating procedures. ER

Three qualifications the industry can't afford to lose

Government's decision to extend enrolment periods for legacy qualifications has provided a level of assurance for some professionals. This decision, however, has left the industry with lingering questions as uncertainty looms over whether the freight sector is developing the skills it will need in practice in the years ahead.

CEO of the Institute of Customs and Freight Forwarding (ICFF), Ingrid du Buisson, believes the more pressing issue for industry is ensuring that the occupational qualifications supporting today's freight workforce remain available. While government has extended older qualifications, she says occupational programmes that have either already expired or are approaching expiry should be prioritised.

Occupational qualifications reflect the skills required by the modern freight and logistics sector, making them an urgent focus area for extension by government.

Among these, the Occupational Certificate: Clearing and Forwarding Agent (SAQA ID 96368) stands out as a priority. The qualification expired in December last year and is often a starting point for careers in customs clearing and freight forwarding.

"It is the operational qualification that prepares people to work in the industry," Du Buisson said. "It equips learners with the practical competencies employers require, from customs procedures and freight documentation to international trade processes."

This qualification was introduced as part of the gradual shift towards occupational qualifications. It was designed through engagements with industry to better reflect current workplace requirements and replace outdated legacy programmes.

Another key qualification is the Occupational Certificate: Supply Chain Practitioner (SAQA ID 110942). It is also due to expire later in December, and Du Buisson describes this qualification as a reflection of the way supply chains have been increasingly integrated and technology driven. It requires practitioners who fundamentally understand logistics planning, inventory management and end-to-end supply chain coordination.

As supply chains become more complex, Du Buisson argues that industry requires qualifications that can develop practical workplace competence – not just theoretical learning.

Equally important is the Occupational Certificate: Customs Compliance Manager (SAQA ID 102499), which will expire in December. According to Du Buisson, growing regulatory and increasingly sophisticated customs environments mean companies need professionals who understand compliance, risk management and border administration.

"Customs compliance has become a specialised discipline, requiring continual professional development as legislation and international trade requirements evolve," Du Buisson adds.

She believes that long term, these qualifications will support career progression from operational roles, all the way to management and specialist positions.

"Industry is not saying legacy qualifications have no place. Our concern is that the qualifications currently preparing people for today's freight environment must not expire."

For the ICFF, this discussion is simply around ensuring qualifications that form the foundation of customs, freight forwarding and supply chain careers continue to produce the skilled professionals industry will need in the future. MN

Real-world exposure an ongoing challenge

A global shortage of skilled supply chain professionals is placing renewed emphasis on training and staff retention, while the logistics industry is demanding a different mix of skills than it did five years ago. As technology and AI become as important as operational experience, employers are looking for professionals who can adapt to a fast-evolving workplace.

According to Professor Rose Luke of the University of Johannesburg's Institute of Transport and Logistics Studies (Africa), technical expertise is no longer enough, with organisations increasingly seeking professionals who can combine data-driven decision-making with strong interpersonal and leadership skills.

While soft skills have always been essential, Luke says the growing use of AI has introduced an entirely new dimension to workforce development.

"There is a lot of training required around AI, including how to use it effectively, as well as the ethics and governance surrounding its use," she says. "Data science and data analytics remain critical, but it is equally important to understand how to combine AI with real intelligence."

Sustainability and environmental, social and governance (ESG) principles are also becoming central to supply chain operations, requiring professionals to develop new competencies alongside traditional logistics knowledge. As a result, Luke says training must be ongoing, current and relevant, while companies will need to do everything they can to retain skilled employees.

Dr Nazmira Mohamed, programme coordinator for Boston's BCom Supply Chain Management, BCom Management Marketing and Postgraduate Diploma in Management, says employers are increasingly seeking multi-skilled graduates who can combine traditional supply chain expertise with digital capabilities.

> "The breadth of the logistics and supply chain profession makes it impossible to cover every workplace requirement in a single curriculum.
> – Professor Rose Luke

Technology and AI are reshaping the skills required across the logistics and supply chain sector, placing pressure on educational institutions to adapt.

"Businesses are looking for professionals who can manage contracts, procurement, costing and transport economics while also optimising digital systems," she says. "Recruitment is increasingly favouring candidates with exposure to automation and data analytics."

Whether educational institutions can keep pace with these changing requirements remains an ongoing challenge. Luke believes South Africa's tertiary institutions are producing graduates with strong foundations, but says the breadth of the logistics and supply chain profession makes it impossible to cover every workplace requirement in a single curriculum.

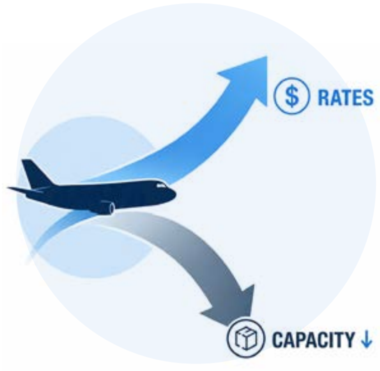
"The field is so broad that it is not always possible to cover every aspect that may be required in the workplace," she says. "What we hope to do is ensure that our graduates enter the workplace equipped with the ability to adapt and learn new skills quickly."

She said practical workplace exposure remained one of the biggest gaps between academic training and industry requirements. While universities have introduced a range of initiatives to give students real-world experience, industry has an equally important role to play.

"Students could benefit from greater exposure to practical workplace issues through initiatives such as holiday placements and other opportunities to gain hands-on industry experience," she said. LV

Feature by Liesl Venter and Ed Richardson

Rates expected to increase



The first half of 2026 has proved far more turbulent for global airfreight than initially anticipated, with conflict in the Middle East disrupting capacity, pushing up rates and halting the expected shift of cargo back to ocean freight.

Xeneta data shows that global airfreight demand remained resilient despite the disruption, increasing by 7% year on year in June after contracting by 3% in March. Demand growth for the year is now tracking at around 3%, at the upper end of Xeneta's original forecast of 2-3%.

Peter Sand, chief analyst at Xeneta, said global capacity had increased by 3% year on year in June, recovering from a 6% contraction in March and a further 1% decline in April. However, Xeneta has revised its full-year capacity growth forecast from 3-4% to 2-3% due to the impact of the conflict.

"It has been an interesting but highly turbulent period for airfreight," said Sand. "Considering the importance of the Middle East as a hub for global airfreight supply chains, it is not surprising that the year has unfolded very differently from what we anticipated at the end of 2025."

At the height of the disruption, outbound capacity from the Middle East fell by more than 90%, affecting major transhipment hubs connecting Asia with Europe and, to a lesser extent, the east coast of North America.

Sand said the disruption and resulting market pressure were unlikely to ease significantly in the near term.

"We expect rates and capacity pressures to remain elevated for the rest of the year because uncertainty surrounding the Middle East is unlikely to peter out anytime soon."

> "Considering the importance of the Middle East as a hub for global airfreight supply chains, it is not surprising that the year has unfolded very differently from what we anticipated at the end of 2025.
> – Peter Sand

On the upside, the sector has recorded solid demand growth in recent weeks.

"Considering the contraction recorded in March and the subsequent recovery, there is clearly no such thing as a dull day in the airfreight market," said Sand.

The combination of disrupted capacity and recovering demand has pushed up airfreight rates across most major trade lanes. Xeneta initially expected shipper rates to decline by between 5% and 10% this year but now forecasts an increase of between 5% and 15%.

Global rates were 38% higher year on year in June, with the average spot rate reaching $3.40 per kilogram. The transatlantic market was the notable exception, recording a decline of around 25%.

Sand cautioned that the divergence between trade lanes meant businesses could not rely on global rate indicators alone.

"You need to examine individual trade lanes and understand how developments affect your company's specific needs," he said.

The global dynamic load factor stood at 62% in June, three percentage points higher than a year earlier. LV

Industry shifting to value-dense cargo

A transition from Just-in-Time (JIT) to Just-in-Case (JIC) inventory management is impacting global airfreight logistics.

JIT minimises inventory by ordering goods only as needed, while JIC builds resilience by holding larger safety stocks.

Disruptions such as extreme weather, Covid-19 shutdowns, geopolitical tensions and port congestion have encouraged many firms to adopt JIC practices.

While this provides a buffer, airfreight is still needed to carry cargo when vessels, rail or road transport is disrupted long enough for inventories to run down.

Airfreight also has a role to play where companies distribute inventory across multiple locations to reduce supply chain risk, particularly when emergency replenishment of regional distribution centres is needed.

> "Disruptions reshaping logistics are no longer temporary, but structural – and geopolitics is the primary engine driving that shift.
> – Report

Industries such as electronics, pharmaceuticals and automotive manufacturing rely on airfreight to avoid production interruptions and maintain service levels.

Including airfreight as a backup means of transportation strengthens supply chains.

Cost is a deciding factor.

The Council of Supply Chain Management Professionals' *2026 State of Logistics Report* found that the airfreight market was shifting toward value-dense cargo where speed and reliability outweigh freight cost.

"The clearest and most consequential finding of this year's report is that the disruptions reshaping logistics are no longer temporary, but structural – and geopolitics is the primary engine driving that shift.

"Resilience is no longer an attribute that organisations aspire to, but the minimum viable condition for operating," it states.

Locally, the Department of Transport's airfreight strategy for South Africa notes: "Growth in airfreight is unlikely to occur from capturing freight from other transport modes.

"It would rather be stimulated by economic growth, in general, by increased production sophistication (less export as unprocessed bulk and more as value-added goods such as electronics) and by having a more outward-looking trade orientation (as promoted under the AfCFTA)."

This view is supported by IATA's latest industry statistics, which show a modest 0.7% growth in cargo between 2025 and 2026, generating $162 billion in revenue for airlines, which is well down on the $210bn Covid lockdown–induced peak in 2021.

To make informed decisions, cargo owners and logistics services suppliers need to be plugged into global events and trends, according to the report.

"The enterprises pulling ahead are those that have built the organisational and technological infrastructure to operate adaptively, which means sensing changes faster, making better decisions under uncertainty and reconfiguring resources more quickly than their competitors". ER

E-commerce drives demand

Rapid growth in e-commerce shipments from Asia is reshaping airfreight demand across Airlink Cargo's domestic and regional network.

According to Hardus Kuschke, executive manager of ground operations at Airlink Cargo, e-commerce and courier shipments have become the airline's biggest cargo drivers.

"The growth in e-commerce, accelerated by the Covid pandemic, has been phenomenal and cannot be ignored," he told *Freight News*. "We are also seeing an uptick in demand for courier items, particularly regionally."

However, Kuschke said the viability of e-commerce supply chains depended on more than air connectivity. While Airlink Cargo could transport shipments over the longest part of their journey, reliable and efficient last-mile delivery remained critical.

Efficient customs clearance and cargo handling are equally important, particularly for cross-border and longer-distance international shipments.

Beyond e-commerce, Airlink is seeing steady regional demand for small mining, machinery and automotive components, electronics and other high-value, low-weight manufactured goods.

Fresh produce, including cut flowers, fruit and wine, also continue to generate demand across domestic and regional markets, while live-animal transportation remains another important segment of the airline's cargo business.

Kuschke said these varied cargo flows demonstrated airfreight's importance in connecting regional markets and supporting time-sensitive supply chains. LV

New aircraft expand regional network

Airlink Cargo is positioning itself for expansion into new regional markets, including West Africa, as the airline rolls out its fleet of Embraer E195-E2 aircraft.

According to Hardus Kuschke, executive manager of ground operations at Airlink Cargo, the aircraft's improved range and payload performance will bring several new destinations and trade lanes within reach.

"We have invested in ten new aircraft. Four have been delivered, with three more arriving this year and the remaining three in 2027," he told *Freight News*. "They represent the latest generation of aircraft and engine technology and were designed to significantly reduce fuel consumption and emissions."

Kuschke described the new aircraft as a game changer for the airline. "Although the E195-E2 provides marginally more cargo capacity than the E1 variant, its biggest benefits are its operational cost efficiency and range-payload performance. These put many exciting new destinations and markets within our reach, with several already on our radar."

However, the volatility of jet fuel prices brought about by the Middle East conflict remains one of the sector's biggest challenges.

"It has been a major headache over the past five months," said Kuschke. "Jet fuel is not a price-regulated product and, even before the current crisis, its price was about 17% above the global average."

With the Strait of Hormuz closed, suppliers moved quickly to secure alternative fuel sources in Asia and South America. Airlink recovered some of the additional expense through fuel surcharges, while also absorbing costs by adjusting schedules and deploying aircraft more closely matched to demand on certain routes.

> "By virtue of Airlink's fleet, route network and schedule, Airlink Cargo serves a market segment that most others cannot.
> – **Hardus Kuschke**

Kuschke said airlines had faced significant disruption since more than 400 instrument flight procedures for airports and designated airways were withdrawn from use in July 2024 after the Air Traffic and Navigation Services (ATNS) failed to revalidate them before they expired.

The problem was compounded by the departure of experienced air traffic controllers and airspace and procedure designers, resulting in prolonged delays and missed connections. Although improvements were made as ATNS worked to clear the backlog and restore the procedures, Kuschke said it could still take several months for the situation to normalise.

Turning to the market outlook, Kuschke said domestic airfreight volumes were expected to remain largely flat in the short term, while regional demand continued to increase year on year.

"Regionally, we expect slow and steady growth, particularly in markets and industries such as mining, where shipments need to move by air because suitable road or rail infrastructure is unavailable," he said. "Airfreight is also essential where the distances involved and the time required to move goods overland could disrupt customers' operations."

Kuschke said the increase in regional cargo volumes reflected economic growth in the markets Airlink served. "The same holds true in the domestic market, where economic conditions are reflected in largely flat airfreight volumes."

He described the air cargo market as a useful barometer of economic performance and said operating in a constantly changing environment required resilience and agility.

"By virtue of Airlink's fleet, route network and schedule, Airlink Cargo serves a market segment that most others cannot," he said.

He said that although oil prices had fallen below $80 a barrel, jet fuel prices remained stubbornly high. "The wide crack spread reflects the increased costs of shipping, insurance and infrastructure, as well as the margins applied by refineries and distributors. Nevertheless, we have seen no negative impact on demand for our air cargo services or any reduction in shipment volumes." LV

Capacity constraints an ongoing challenge

The airfreight market remains highly sensitive to international political developments, a trend that was again evident during the first half of 2026.

According to Heinrich Kirstein, SACO Shipping's Cape Town branch manager, expectations are nevertheless positive for the third and fourth quarters, which traditionally mark the peak season and often bring increased flight capacity and higher cargo volumes.

International statistics paint a mixed picture about volumes, largely due to the continued rerouting of global trade. Despite this, Kirstein said general cargo volumes locally had remained resilient and stable.

> Intra-African trade is showing strong growth potential as regional business ties strengthen and forwarders seek better connections to southern and East African hubs.
> – Heinrich Kirstein

"We attribute this stability to local businesses using airfreight to bypass port congestion and move time-sensitive components, consumer goods and industrial spares, thereby keeping local supply chains moving."

He said global maritime disruptions continued to drive the shift from sea to airfreight as businesses sought to mitigate delays and maintain supply-chain continuity. "This modal shift, together with our tailored, hands-on and personalised business model, shows that freight forwarders are not simply looking for space on an aircraft. They want a dedicated partner that provides proactive communication, flexibility and customised service," said Kirstein.

At SACO Shipping, considerable effort goes into understanding the unpredictable and complex supply-chain challenges facing clients.

"We have focused on maintaining a direct, hands-on approach," Kirstein told *Freight News*. "A one-size-fits-all model does not work for everyone. We develop customised solutions for individual shipments and tailor our services to the needs of forwarding clients."

He said the company had refined its co-loading and scheduled consolidation services significantly into and out of Cape Town International Airport. At least three additional flights are expected during the coming peak season, further strengthening its service offering.

"With the maritime sector facing challenges such as port delays, forwarders will continue to rely on flexible airfreight solutions to meet the needs of importers and exporters. However, our primary challenge remains capacity constraints."

Kirstein said seasonal perishables accounted for a significant portion of airfreight volumes at Cape Town International Airport, making it challenging to secure consistent, year-round belly-hold capacity for general cargo.

"Fluctuations in fuel prices, security surcharges and exchange rates require daily monitoring to ensure we protect our clients and provide stable pricing. It would be irresponsible to ignore the challenges created by dynamic pricing. Selling cargo space in the same way that budget airlines sell passenger seats can deter project cargo and we avoid exposing our clients to the risk of uncertain pricing."

These pricing and capacity challenges are particularly evident on certain trade lanes, with some routes experiencing far greater pressure than others.

"We are seeing significant shifts. European routes remain our steady baseline, but inbound and outbound lanes connecting Cape Town with Asian manufacturing hubs via Middle Eastern gateways are experiencing the tightest capacity," said Kirstein.

He added that intra-African trade was showing strong growth potential as regional business ties strengthened and forwarders sought better connections to southern and East African hubs.

Limited airfreight capacity continues to place pressure on shippers moving time-sensitive cargo.

The rapid growth of e-commerce is also reshaping the airfreight market and adding to existing capacity pressures.

"Large volumes from global e-commerce platforms are taking up much-needed airline capacity. This makes our consolidated space allocations and customised solutions particularly valuable to local forwarders who need guaranteed space for their cargo."

However, Kirstein said the growth in e-commerce could also support the introduction of additional flights into Cape Town and, potentially, the dedicated freighter service the market needed. LV

ADVERTISER	PAGE NUMBER
Airlink Cargo	OFC
Credit Risk	IFC

Cold Chain Logistics

Airlink Cargo	4
Air Menzies International	7
J&J Transport	5
OCL Group	7
ShipShape Software	3
Table Bay Cold Storage and Logistics	6

Corridors

Cornelder de Mozambique	13
J&J Transport	11
MACS Maritime Carrier Shipping	10
NAMPORT	8
Port Maputo	9
Walvis Bay Corridor Group	14

Project Cargo

Cornelder de Mozambique	21
Dachser	20
DM Freight Logistics	18

ADVERTISER	PAGE NUMBER
Fr. Meyer's Sohn	19
LBH South Africa I LBH Mozambique	25
MACS Maritime Carrier Shipping	22
MSC Shipping	17
Namgola Logistics	16
NAMPORT	15
Ocean Network Express	24
Port of Maputo	23
Prestgroup	16

Training & Recruitment

Boston City Campus	29
GMLS[e]	27
Metro Minds	30

Airfreight

Airlink Cargo	32
Air Menzies International	33
SACO	33
Transworld Cargo	31