

Cargo Movement Update #242¹

Date: 13 July 2025

Weekly Snapshot

Table 1 – Port volumes and air cargo flows, week on week

Flows	Current ²			Previous ³			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	40 652	46 315	86 967	45 590	51 939	97 487	↓11%
Air Cargo (tons)	3 805	2 184	5 989	3 456	2 238	5 694	↑5%

Monthly Snapshot

Figure 1 – Cyclical⁴ monthly cargo volume, year on year (most metrics: Jun '24 vs Jun '25, % growth)

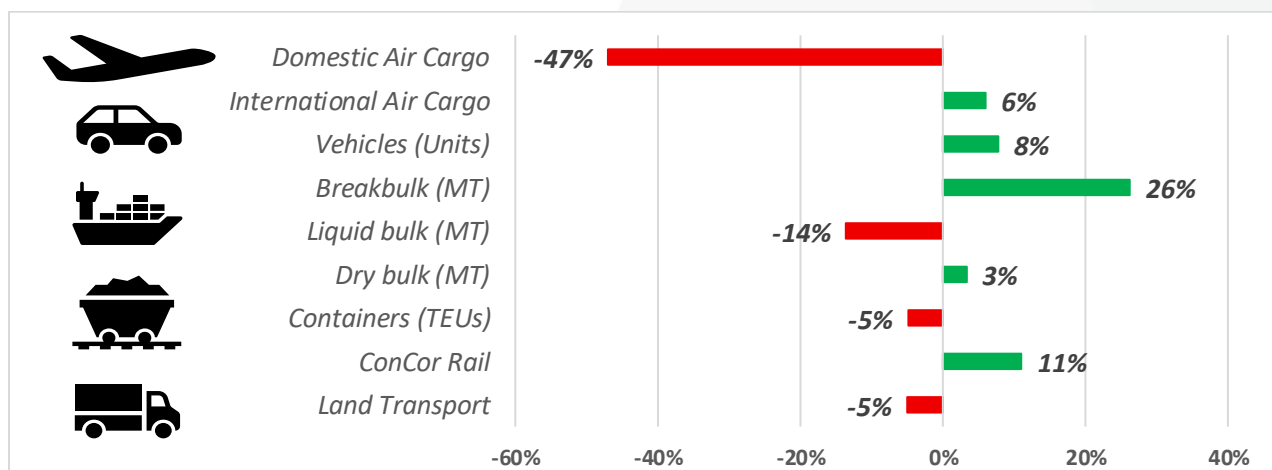
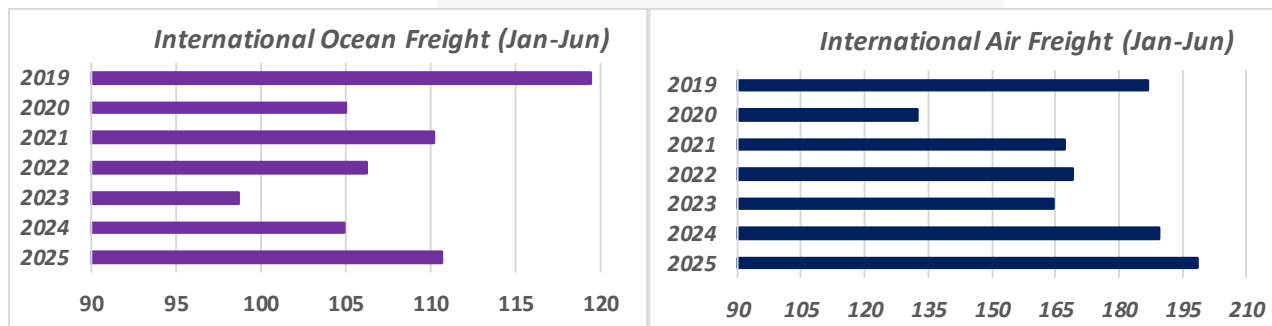


Figure 2 – Year-to-date flows 2019-2025⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~12 933 TEUs was handled per day, with ~12 609 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 3 771 containers, up by ↑9% from last week.
- Cross-border queue: ↓0,5 hrs; transit: ↓0,5 hrs; SA borders: 10,5 hrs (↓6%); SADC: 4,7 hrs (no change).
- World merchandise trade volume grew strongly in Q1 2025 ~↑4% (y/y), exceeding WTO forecasts.
- Global spot rates declined for a 4th consecutive week (by ↓5,0%, or \$140) to \$2 672/40ft.
- Global air cargo was down by ↓3%, as rates are ↑2% (w/w) to \$2,48/kg (Africa cargo up by ↑8%, y/y).

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 242nd update.

² 'Current' means the last seven days (a week's) of available data.

³ 'Previous' means the preceding 8-14 days (a week) of available data.

⁴ 'Monthly' means the last months' worth of available data compared to the same month in the previous year —most metrics: June vs June.

⁵ Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **12 424 TEUs** was handled daily, down from **13 933 TEUs** the previous week. Port operations were mainly constrained by adverse weather, vacant berths, as well as equipment breakdowns and shortages. Adverse weather and equipment breakdowns led to operational delays at the Port of Cape Town, while the main operational constraints in Durban were continuous equipment breakdowns and adverse weather conditions. Vacant berths and inclement weather mainly impacted operations at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. The latest reports from TFR indicate that intermittent cable theft continued on the Central Corridor this week; however, the situation appears to be improving. Additionally, TFR communicated that the annual shutdown on the line between Pretoria and Durban will commence next week, resulting in no trains moving on the line for two weeks.

World merchandise trade volumes grew strongly in Q1 2025, outperforming WTO forecasts due to pre-emptive importing ahead of US tariff hikes, with notable import surges in North America (**↑13,4%**, q/q) and Africa (**↑5,1%**). However, global container shipping rates continue to soften, with *Drewry's World Container Index* down **↓5%** this week and **↓55%** lower than last year. Security in the Red Sea remains critical, as two more bulk carriers were sunk, prompting continued avoidance by Megamax vessels and shifting traffic patterns through the Suez Canal.

In June, international air cargo volumes decreased month-on-month at Johannesburg (**↓3%**) and at Cape Town (**↓15%**), but increased at Durban (**↑13%**). Year-on-year, cargo is up at all terminals (Johannesburg at **↑6%**, Cape Town at **↑1%**, and Durban at **↑30%**) compared to 2024. Moreover, for H1 2025, the year-to-date cargo is up by **↑5%** (y/y).

Domestically, June volumes dropped drastically month-on-month and year-on-year, as Johannesburg is down by **↓36%** (m/m) and **↓27%** (y/y), Cape Town by **↓80%** (m/m) and **↓74%** (y/y) and Durban by **↓8%** (m/m) and **↓2%** (y/y).

Operationally, several domestic aviation developments are worth noting this week, including **(1)** ACSA's suspension of its security executive pending an investigation and appointment of an acting replacement, **(2)** the imposition of an estimated R1,5 million SACAA fine for security protocol breaches, and **(3)** clarification that Temu has not established local warehousing, maintaining reliance on overseas dispatch for South African air cargo.

Internationally, in the first week of July, global air cargo volumes declined by **↓3%** (w/w), mainly due to reduced activity from North America over the US Independence Day, while average rates rose **↑2%**. Capacity remained broadly stable, with Africa showing the strongest growth in both tonnage and rates, and global trends reflecting ongoing modal shifts and regional rebalancing.

Monthly road freight movements across the five main South African border posts are down by **↓5%** (m/m) for June. Cargo movements along the N4 corridor increased slightly for both road and rail transport (noticeable so for rail, after the recent shutdown). Truck volumes through the border post were **1 622 HGVs per day** (**↑4%**, w/w). Queue times increased to an average of **4,9 hours** (**↑11%**) at the border due to some backlogs, as the average processing time also increased to around **4,6 hours** (**↑7%**) per crossing. The rail to Maputo increased to an average of **eight trains daily**. Sugar trains from Eswatini increased to around **two trains a day**. Operationally, significant queues and backlogs led to a "Dry Run" use of a nearby runway as a

staging area without BMA involvement (with ablutions and security in place). At the same time, on the N4 near Crocodile, periodic Stop/Go controls concluded last Thursday.

Land border crossing times decreased at South African borders while remaining primarily unchanged throughout the rest of the SADC region. Overall, the average queue time decreased by approximately **half an hour** from last week, while transit time also decreased by around **half an hour**. The median border crossing times at South African borders decreased by **three-quarters of an hour**, averaging **~10,5 hrs (↓6%)** for the week. In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs (no change)**. On average, three SADC borders took more than a day to cross last week, namely Beitbridge, Kasumbalesa (the worst affected, with an average of **two days from the Zambian side**), and Katima Mulilo. Other developments include **(1)** a power outage at Kopfontein, **(2)** a collision in the Musina area near Beitbridge delaying traffic, **(3)** the newly completed Ndola bypass in Zambia, and **(4)** BURS customs system issues.

In summarising this edition, the latest monthly ocean freight cargo trends have been resoundingly positive. Consolidated numbers from TNPA show that containers increased monthly by **↑8% (m/m)**, total bulk cargo by **↑6%** and vehicles handled by **↑15%**. Moreover, South Africa's bulk cargoes are up by **↑6%** year-to-date (although containers remain down by **↓4,2%** and **↓4,7%** versus last year and 2019 levels, respectively). Nevertheless, over the medium term, the ports industry has seen measurable improvements, including stabilised container throughput, enhanced crane productivity, and the operationalisation of critical equipment such as straddle carriers and RTGs across major terminals. These gains have been driven by coordinated interventions, improved process efficiency, and strengthened governance and planning structures.

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1. Ports Update

This section provides an overview of the flow of containerised cargo through our commercial ports.

a. Container flow overview

The following tables indicate the container flows reported for the last seven days. The reporting aligns with TPT's cycle, which runs from Monday to Sunday.

Table 2 – Container Ports – Weekly flow reported for 7 to 13 July (measured in TEUs)

7-day flow reported (07/07/2025 – 13/07/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 151	36 059	↓4%
New Pier (Pier 1)	2 229	15 605	↓11%
Cape Town Container Terminal	1 874	13 115	↓3%
Ngqura Container Terminal	2 077	14 537	↓6%
Port Elizabeth Container Terminal	262	1 837	↓59%
Other	831	5 814	↓36%
Total	12 424	86 967	↓11%

Source: Calculated from TPT, 2025. Updated 13/07/2025.

A reduced average of ~12 424 TEUs (↓11%) was handled per day for the last week (7 to 13 July, Table 2), although the throughput was still slightly above the projected average of ~12 609 TEUs (↑1% actual versus projected).

For the coming week, a slightly decreased average of ~12 609 TEUs (↑1%) is predicted to be handled (14 to 20 July, Table 3).

Port operations were mainly constrained by adverse weather, vacant berths, as well as equipment breakdowns and shortages.

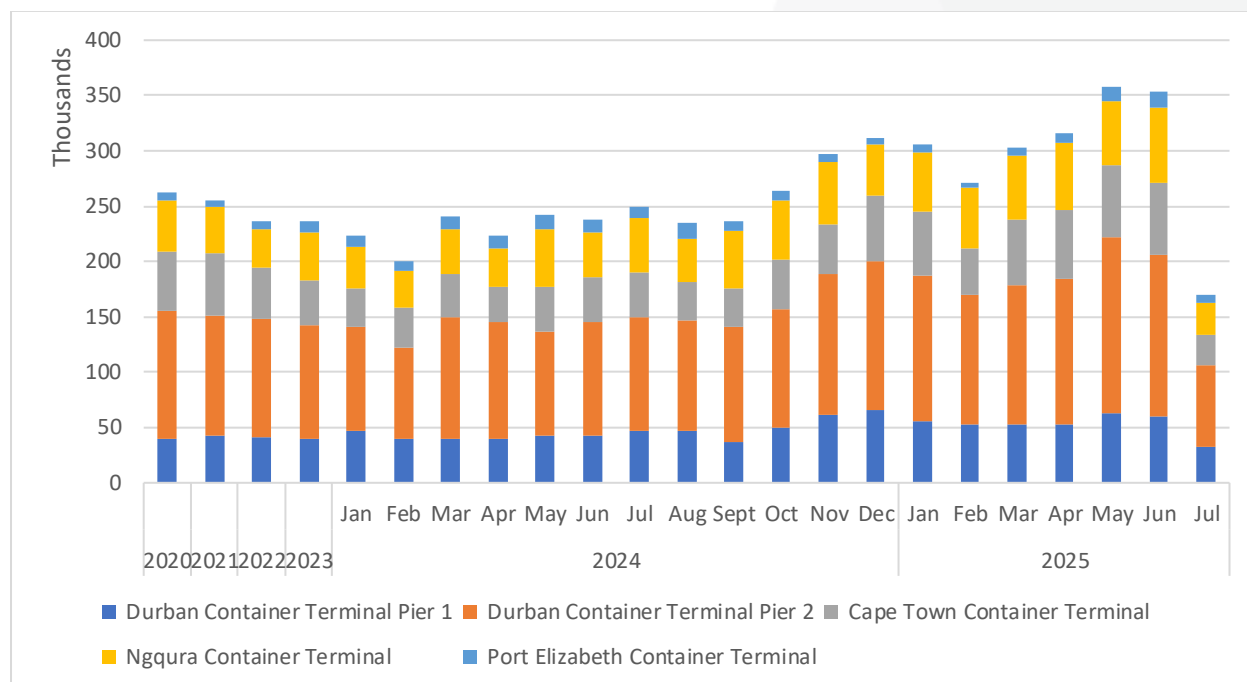
Table 3 – Container Ports – Weekly flow projected for 14 to 20 July (measured in TEUs)

7-day flow projected (14/07/2025 – 20/07/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 408	37 856	↑5%
New Pier (Pier 1)	2 073	14 511	↓7%
Cape Town Container Terminal	1 755	12 283	↓6%
Ngqura Container Terminal	2 059	14 414	↓1%
Port Elizabeth Container Terminal	499	3 496	↑90%
Other	815	5 704	↓2%
Total	12 609	88 264	↑1%

Source: Calculated from TPT, 2025. Updated 13/07/2025.

The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

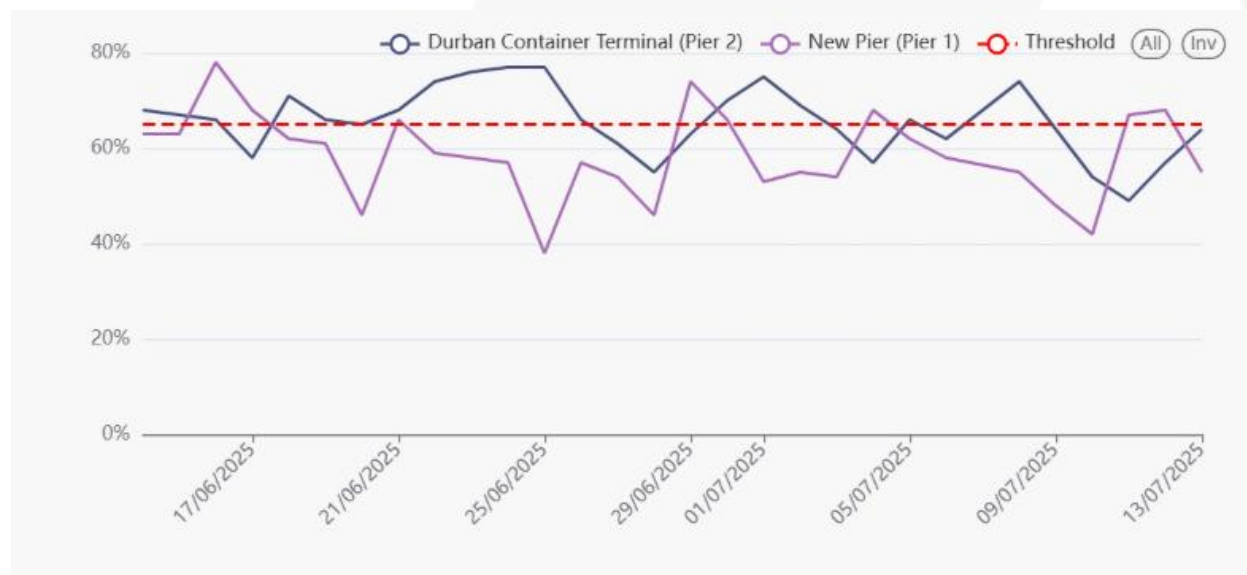
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 13/07/2025.

The following figure shows daily stack occupancy in both Durban terminals over the last five weeks.

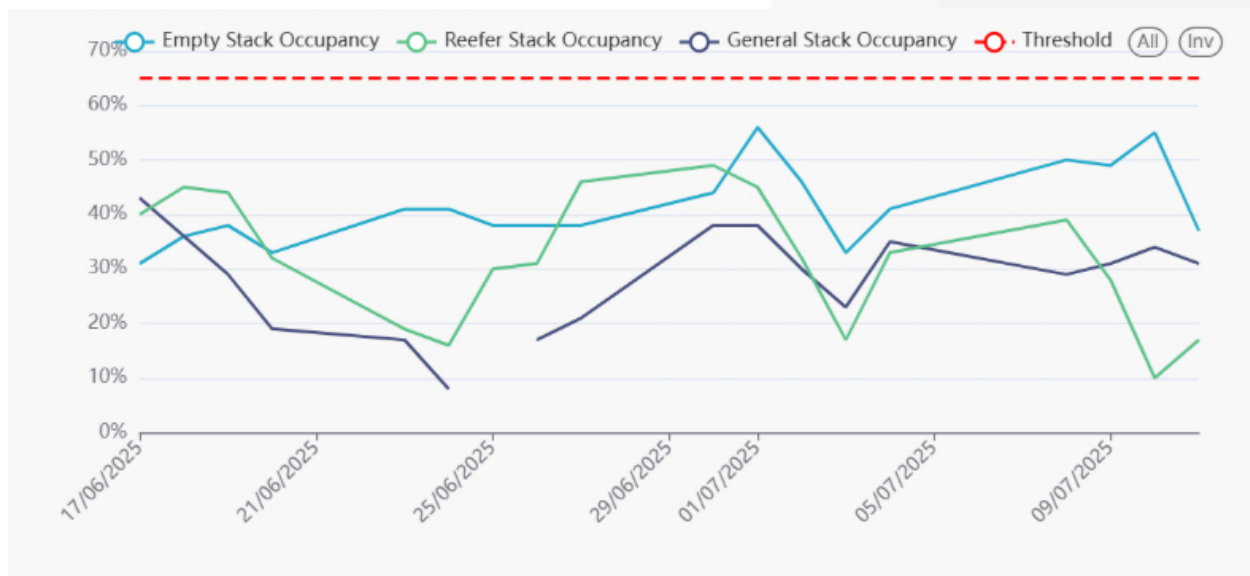
Figure 4 – Stack occupancy in DCT, general-purpose containers (17 June to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 13/07/2025.

The following figure shows daily stack occupancy in Cape Town over a similar period.

Figure 5 – Stack occupancy in CTCT, GP, reefer, and empty stack (17 June to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 13/07/2025.

b. TNPA: June update

TNPA has released consolidated port statistics for June⁶, with another month of significant increases in monthly performance across the respective sub-sectors:

- Containers increased monthly by **↑8%** (m/m), but decreased annually by **↓5%** (y/y).
- Total bulk cargo increased monthly by **↑6%** (m/m) and annually by **↑1%** (y/y).
- Vehicles increased monthly by **↑15%** (m/m) and annually by **↑8%** (y/y).

The following table shows the respective changes versus May:

Table 4 – TNPA – Monthly volume and growth: June 2025

	May	June	Movement	% change
Containers (TEUs)	346 480	373 644	27 164	8%
Landed	167 826	188 732	20 906	12%
Shipped	178 654	184 912	6 258	4%
Dry bulk (MT)	14 228 886	15 277 178	1 048 292	7%
Liquid bulk (MT)	2 916 933	2 713 689	-203 244	-7%
Breakbulk (MT)	492 083	642 527	150 444	31%
Vehicles (Units)	61 292	70 291	8 999	15%
Total cargo (excl. Vehicles)	17 637 901	18 633 394	995 493	6%

Source: [TNPA](#), updated 13/07/2025.

Transnet Port Terminals handled **373 thousand containers** and **18,6 million metric tonnes** of bulk cargo during June, significantly more than the **347 thousand containers** and **17,6 million metric tonnes** of bulk cargo handled last month. However, compared to cyclical trends, the number of containers is down by **19**

⁶ Transnet. 2025. [Port statistics](#).

thousand. For bulk cargoes, annual throughput is **almost the same** compared to June 2024, as evidenced by the following:

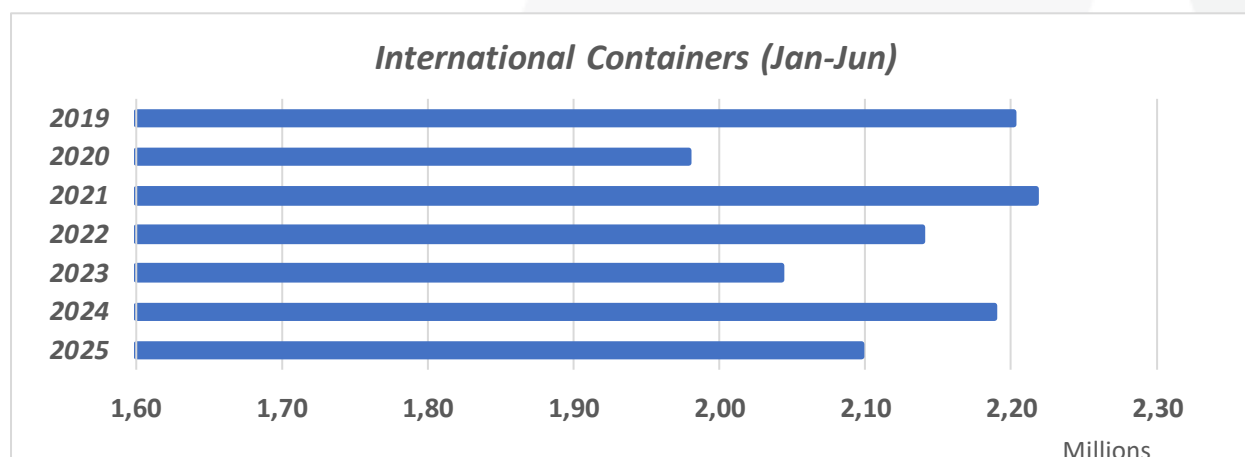
Table 5 – TNPA – Cyclical volume and growth: June 2019, 2024, and 2025

	2019	2024	2025	% '20 –'25	% '24-'25
Containers (TEUs)	389 779	392 628	373 644	-4%	-5%
Landed	206 486	192 817	188 732	-9%	-2%
Shipped	183 293	199 811	184 912	1%	-7%
Dry bulk (MT)	15 208 884	14 779 824	15 277 178	0%	3%
Liquid bulk (MT)	2 779 753	3 141 554	2 713 689	-2%	-14%
Breakbulk (MT)	330 235	509 035	642 527	95%	26%
Vehicles (Units)	67 025	65 213	70 291	5%	8%
Total cargo (excl. Vehicles)	18 318 872	18 430 413	18 633 394	2%	1%

Source: [TNPA](#), updated 13/07/2025.

Only liquid bulk throughput is down annually (**↓14%**, y/y); whereas dry bulk (**↑1%**) and breakbulk (**↑26%**) throughput have increased compared to June 2024. When reading the cyclical figures with the year-to-date figures (note *Figure 2* The optimism continues, as South Africa's bulk cargoes are up by **↑6% YTD**. The same is not true for containers, as illustrated by the following year-to-date for containers to June:

Figure 6 – Year-to-date flows 2019-2025: containers, y/y (TEU millions)



Source: [TNPA](#), updated 13/07/2025.

As with last month, containers are down versus last year (**↓4,2%**) and **↓4,7%** below 2019 levels. Fortunately, with several notably high-throughput figures achieved over the previous few weeks, the deficit is expected to be significantly less by the end of July.

c. Summary of port operations

i. Weather and other delays

- Adverse weather and equipment breakdowns ensured operational delays at the Port of Cape Town.
- The main operational constraints in Durban proved to be continuous equipment breakdowns and adverse weather.
- Vacant berths and inclement weather mainly impacted operations at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

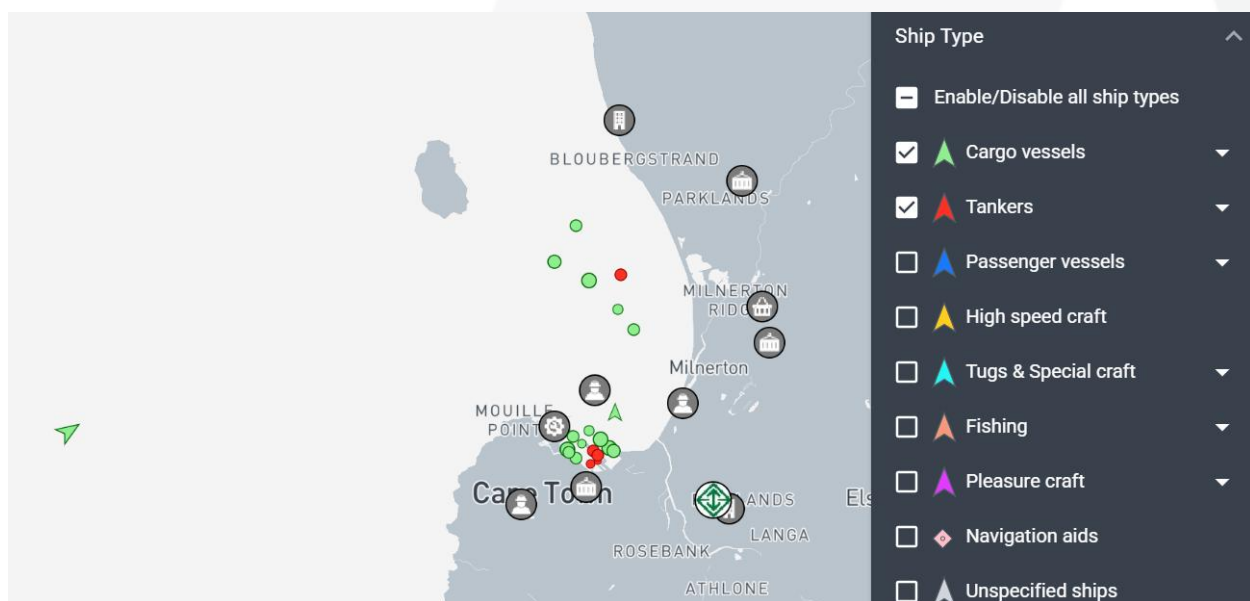
ii. Cape Town

On Thursday, CTCT recorded three vessels at berth and one at anchor, as adverse weather and equipment challenges proved to be the primary operational constraints at the port. On the landside, between Monday and Thursday, the terminal managed to service at least 4 426 trucks while handling approximately 203 rail units. On the waterside, the terminal handled approximately 5 067 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 34%, reefers at 10%, and empties at 55%**. Additionally, the terminal operated with **six STS cranes, 20 RTGs, and 56 hauliers** towards the end of the week. Cranes LC3, LC6, and LC9 were out of commission before the weekend, with no ETR communicated yet.

On Thursday, CTMPT recorded three vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal successfully handled 3 590 tons and 217 container moves on the waterside, despite operations being impacted by inclement weather. On the landside, 204 trucks were processed during the same period. Stack occupancy was recorded at 4% for general cargo, 0% for reefers, and 9% for empties. Towards the end of the week, the terminal operated with three cranes and four straddle carriers.

Between 30 June and 06 July, the FPT terminal handled seven vessels: three multi-cargo, two dry bulk, and two container vessels. Berth occupancy during this period was recorded at 91%. The terminal planned to handle ten more vessels between 7 and 13 July, with another nine vessels scheduled between July 14 and 20. Inclement weather, as well as the late arrival of cargo, accounted for the most significant operational constraints during this period.

Figure 7 – Cape Town vessel view (per vessel group)



Source: Marine Traffic. Updated 13/07/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, with one vessel at anchor. Stack occupancy was **42% for GP containers and 43% for reefers**. Between Monday and Friday, the terminal executed at least 6 843 gate moves and 384 rail moves on the landside. The **average TTT for the week was ~61 minutes (↑2%, w/w)** and an average **staging time of ~34 minutes (↑13%)**. Additionally, the terminal moved over 6 982 TEUs across

the quay on the waterside during the same period. The terminal had **six STS cranes** and **18 RTGs** available towards the end of the week.

Pier 2 had four vessels on berth and zero at anchorage on Thursday, as equipment breakdowns, adverse weather, and congestion prevented optimal operational performance this week. Stack occupancy was recorded at **54% for GP containers** and **30% for reefers**. The terminal operated with **12 gangs** and moved over **18 800** containers across the quay between Monday and Friday on the waterside. Approximately 13 752 gate moves were executed on the landside during the same period. Over the last week, the average TTT was **~81 minutes (↓7%, w/w)**, and the staging time was also **~81 minutes (↑29%)**. Approximately 2 565 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **71** and **76** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **84%** during this period. Towards the end of the week, the most notable crane absentees were Cranes 521, 522, and 531; however, these machines were anticipated to return to operations before the weekend.

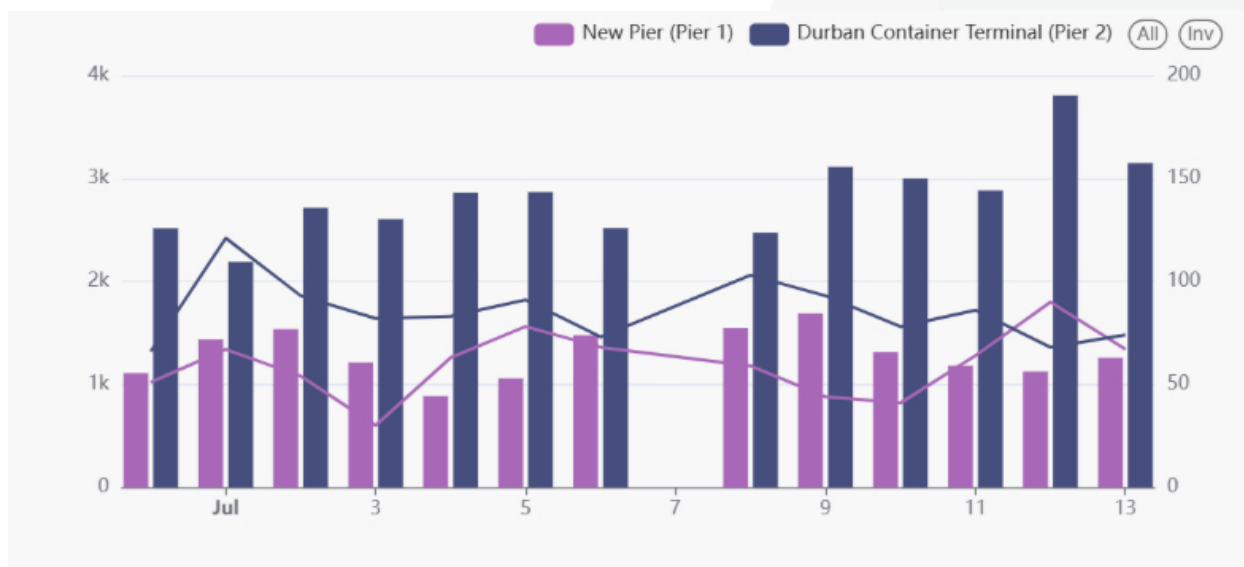
Durban's MPT terminal recorded one vessel at berth on Thursday and one at outer anchorage. Stack occupancy for containers was recorded at 44%, and for the reefer stack, it was 51%, with the breakbulk stack at 85%. In the preceding 24 hours, 408 containers and 618 tons of break bulk were handled on the waterside. On the landside, 272 container trucks were serviced at a TTT of ~52 minutes. Additionally, 129 breakbulk trucks, containing 3 721 tons, were serviced. During this period, two cranes, eight reach stackers, eight forklifts, and 23 ERFs were in operation. The latest reports from TPT indicate that the third crane is expected to resume operations before the weekend, while the fourth crane is scheduled to return to service around 21 December.

Between Wednesday and Thursday, the Maydon Wharf MPT recorded zero vessels at berth and zero at anchorage. On the waterside, no volumes were handled, while 16 RMTs and 21 container trucks, containing approximately 1 260 tons, were serviced on the landside. During the same period, the agri-bulk facility recorded zero vessels at berth and one at anchor. The anchored ship is scheduled to berth around 17 July. No volumes were handled at the terminal during this period.

On Thursday, the Ro-Ro terminal in Durban had one vessel on the berth and one at anchorage. In the preceding 24 hours, the terminal handled 692 road units and 75 units on rail on the landside, while 246 units were handled on the waterside. Overall stack occupancy was 24%, 50% at Q&R, and 30% at G-berth. During this period, the terminal had 110 high-and-heavy (abnormal loads) on hand and managed to handle 71.

The following figure summarises the performance of Durban's container terminals for the last two weeks, focusing on gate moves and time spent in the terminals.

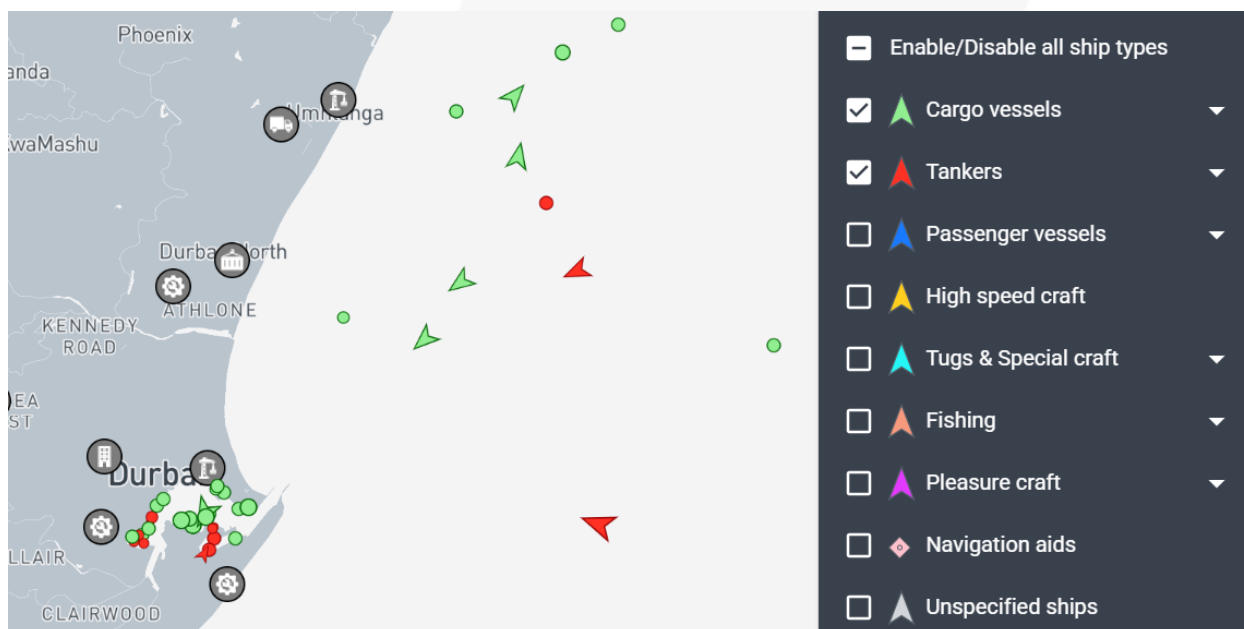
Figure 8 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 13/07/2025.

The queue of container vessels waiting outside Durban has remained low and almost unchanged from last week. On Monday evening (13 July), **one** container vessel was waiting outside at anchorage for Pier 1, **none** for Pier 2, and **one** for Point. The queue of dry (**three**), liquid (**two**), and breakbulk (**two**) vessels has also remained stable. However, there are some international reports of increased congestion at African ports and carriers introducing surcharges.⁷ The following snapshot shows the current status quo:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 13/07/2025 at 14:00.

⁷ Whiteman, A. 15/07/2025. [Carriers introduce surcharges as congestion builds at African ports.](#)

iv. Richards Bay

On Thursday, the Port of Richards Bay had six vessels at anchor and six on the berth, translating to three vessels at DBT, zero at MPT, one at RBCT, and two at the liquid bulk terminal. Two tugs and one pilot boat operated for marine resources towards the end of the week. The helicopter remained out of commission during this period, with no ETR communicated yet.

The daily average coal throughput for the week decreased again to around **107 000 tons** (↓16%, w/w). Nevertheless, despite the reduction, an increased average of **23 trains** (up by **five** from last week) were serviced on the landside, slightly above the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded two vessels on berth and one at anchor, with one vessel drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. For the majority of the week, the Ports of PE and Coega shared a pilot boat due to some challenges with their waterside equipment. Stack occupancy figures were recorded at 32% for reefers, 87% for reefer ground slots, and 72% for the general stack. Despite being windbound for around six hours, the terminal handled approximately 1 617 TEUs and 78 reefers on the waterside. Approximately 535 trucks were processed on the landside at a TTT of ~38 minutes. Towards the end of the week, the terminal had six STS cranes, 23 RTGs, and 40 hauliers in service.

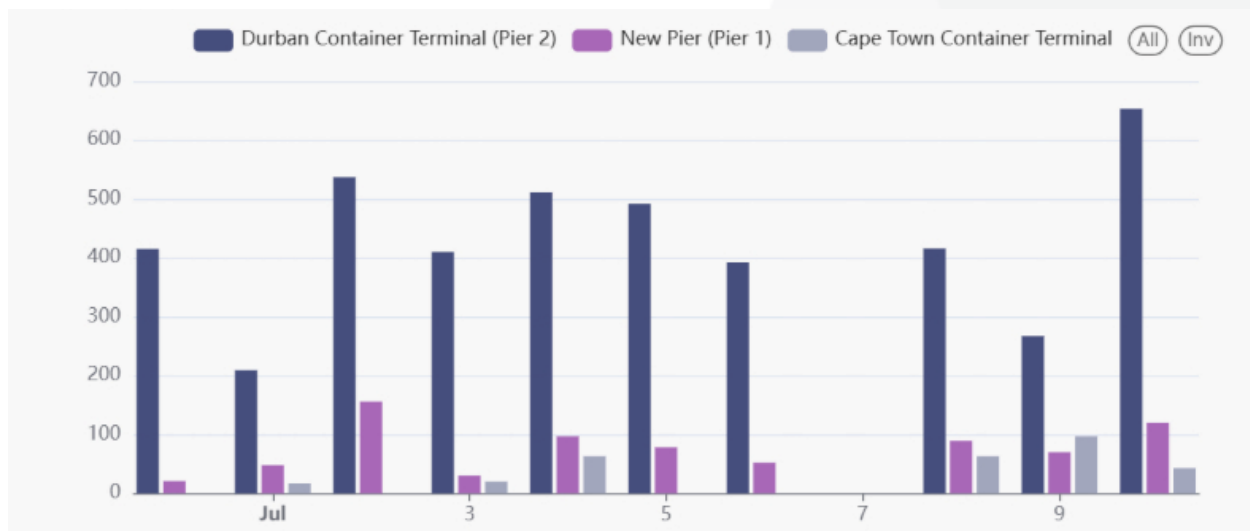
On Thursday, GCT had zero vessels at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 156 trucks were processed at a TTT of ~18 minutes on the landside, while 336 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 16% for the general stack, 31% for reefers, and 19% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and nine straddles in service.

On Thursday, the Ro-Ro terminal had zero vessels on berth and zero at outer anchorage. No vessels were serviced at the terminal this week, as all vessels were delayed at other ports. Nevertheless, stack occupancy was recorded at 15%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR indicate that intermittent cable theft continued on the Central Corridor this week; however, the situation appears to be improving. Additionally, TFR communicated that the annual shutdown on the line between Pretoria and Durban will commence next week, resulting in no trains moving on the line for two weeks. Furthermore, towards the end of the week, DCT Pier 2 had 324 ConCor units on hand with a 24-hour dwell time and 337 over-border units with a 60-day dwell time.

Figure 10 – TFR: Rail handled (Pier 1, Pier 2, and CTCT)



Source: Calculated using data from Transnet, 2024. Updated 13/07/2025.

In the last week (7 to 13 July), rail cargo on the ConCor line out of Durban was reported at **3 771** containers, up by **↑9%** from the previous week's **3 448** containers.

2. Air Cargo Update

a. International air cargo

The following table shows the inbound and outbound air cargo flows to and from ORTIA for the week (7 to 13 July).⁸ For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in July 2024 averaged **~862 534 kg** daily.

Table 6 – International inbound and outbound cargo from OR Tambo

Flows	07-Jul	08-Jul	09-Jul	10-Jul	11-Jul	12-Jul	13-Jul	Week
Volume inbound	403 554	279 500	253 100	238 483	323 909	220 105	2 086 828	3 805 479
Volume outbound	152 894	177 897	171 721	161 070	170 973	176 067	1 172 888	2 183 510
Total	556 448	457 397	424 821	399 553	494 882	396 172	3 259 716	5 988 989

Courtesy of ACOC. Updated: 13/07/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~544 000 kg** inbound (**↑10%**, w/w) and **~312 000 kg** outbound (**↓2%**). The current levels indicate that cargo is trending at approximately the same level as last year (**↓1%**, y/y) and the comparative levels of pre-pandemic 2019 (**↑1%**).

For the full month of June:

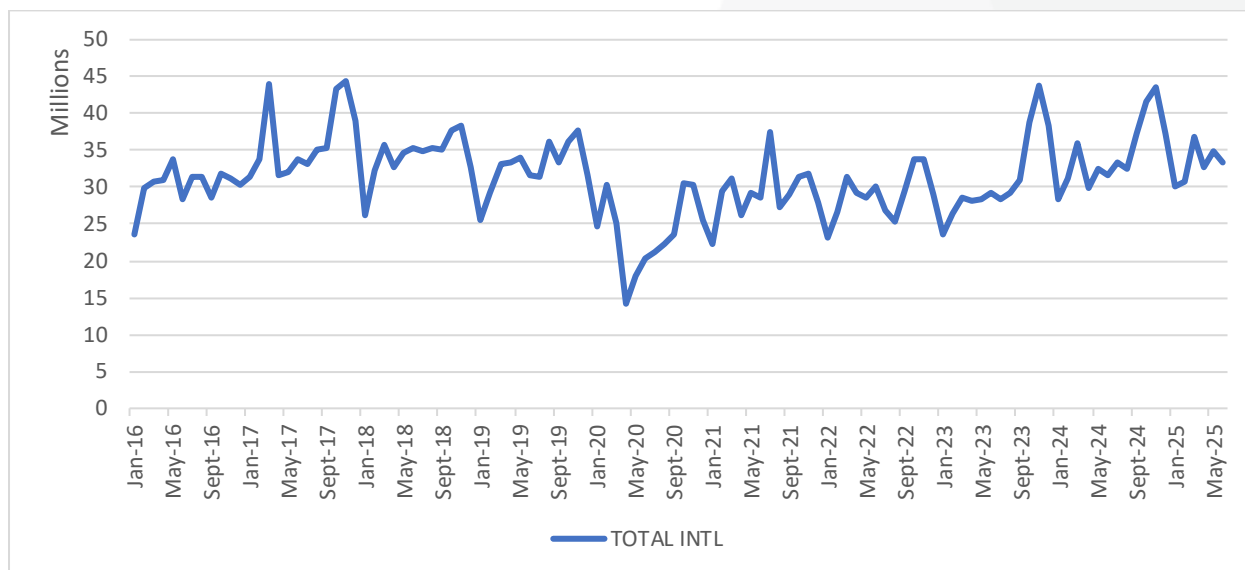
- Johannesburg decreased by **↓3%** (m/m) versus May but increased by **↑6%** (y/y) versus 2024.
- Cape Town decreased by **↓15%** (m/m), but increased by **↑1%** (y/y) versus 2024.
- Durban increased by **↑13%** (m/m) and increased by **↑30%** (y/y) compared to 2024.

⁸ Note: We have updated the reporting period to coincide with the latest Monday to Sunday cycle (7 to 13 July)..

- Despite the monthly decrease in air cargo, the year-to-date cargo is still up by **↑5%** (y/y) versus 2024.

The following figure shows the international air cargo flows to and from all terminals since the start of 2016:

Figure 11 – International cargo for All Airports – volumes per month (kg millions)



Calculated from ACOC. Updated: 13/07/2025.

Operationally, several matters are worth reporting on this week:

1. ACSA appoints Joubert following suspension of Petros:

- Airports Company South Africa (ACSA) has suspended its Group Executive for Enterprise Security and Compliance, Lieutenant General Mzwandile Petros, pending an independent investigation into alleged operational irregularities, particularly concerning the procurement of Explosive Trace Detection equipment.⁹
- Mary-Ann Joubert has been appointed as Acting Group Executive. ACSA has emphasised that operational continuity will be maintained throughout the course of the investigation.

2. Leadership restructuring follows imposition of security breach fine:

- ACSA has been issued an estimated R1,5 million administrative fine by the South African Civil Aviation Authority (SACAA) for violations of security protocols.¹⁰
- The timing of the penalty coincides with the suspension of Petros. SACAA confirmed that the fine forms part of its regulatory enforcement obligations under its safety and security mandate.
- ACSA has reiterated that the suspension is a precautionary measure and will not affect airport operational integrity.

⁹ Khumalo, N. 13/07/2025. [After suspending Petros, ACSA appoints Joubert as acting group exec for enterprise security and compliance.](#)

¹⁰ Sithole, S. 14/07/2025. [Airports Company of South Africa's leadership shake-up follows significant security breach fine.](#)

3. Temu's South African warehouse claims – a logistics assessment:

- Multiple sources have clarified that the Chinese e-commerce platform Temu has not, contrary to certain claims, established a local warehousing presence in South Africa.¹¹
- Instead, products continue to be dispatched directly from overseas markets.
- This arrangement implies no material improvement in delivery lead times or development of local warehousing and distribution infrastructure relevant to South African air cargo operations.

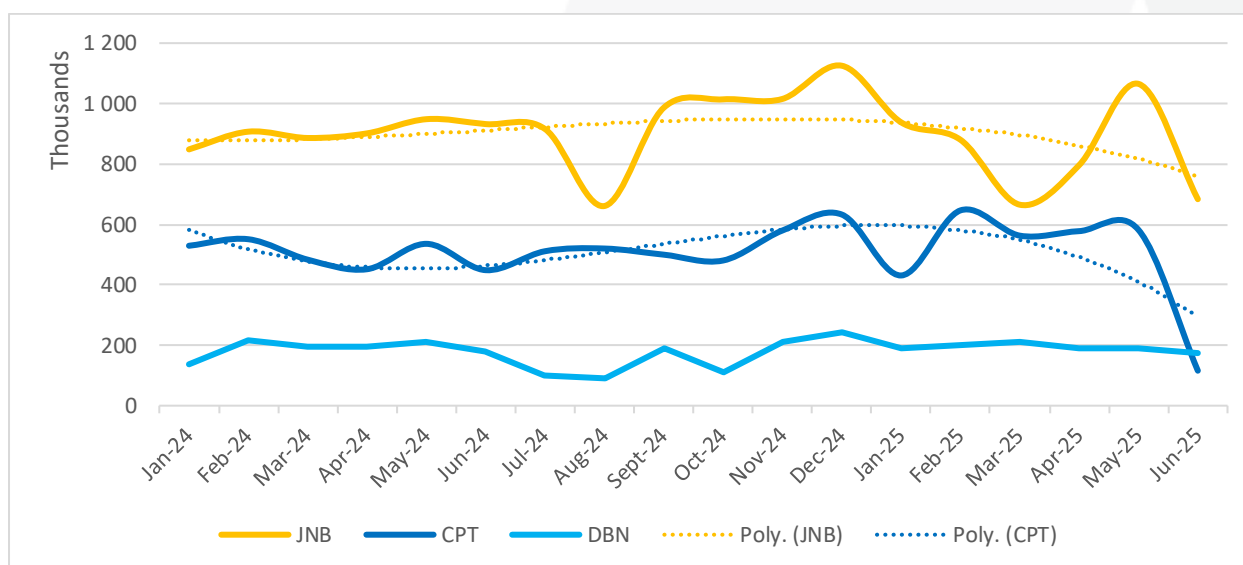
b. Domestic air cargo

For the full month of June, domestic volumes handled at our three main terminals dropped drastically:

- Johannesburg decreased by **↓36%** (m/m) versus May and by **↓27%** (y/y) versus 2024.
- Cape Town decreased by **↓80%** (m/m) and by **↓74%** (y/y) versus 2024.
- Durban decreased by **↓8%** (m/m) and by **↓2%** (y/y) versus 2024.

The following figure shows the movement since the start of last year, with the drop-off for June noticeable:

Figure 12 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 13/07/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (7 to 13 July), cargo movements along the N4 corridor increased slightly for both road and rail transport (noticeable so for rail, after the recent shutdown). The following notes summarise the recent developments:

- Truck volumes through the border post were **1 622 HGVs per day (↑4%, w/w)**.
- Queue times increased to an average of **4,9 hours (↑11%)** at the border due to some backlogs (see below), as the average processing time also increased to around **4,6 hours (↑7%)** per crossing.

¹¹ Vermeulen, J. 13/07/2025. [Truth about Temu local warehouse launch in South Africa](#).

- The rail to Maputo increased to an average of **eight trains daily**. Sugar trains from Eswatini increased to around **two trains a day**.
- **Some developments in and around the Lebombo border post included the following:**
 - Some queues and backlogs were reported last week. Consequently, a nearby runway has been opened as a staging area in a “Dry Run” (trial operation) without BMA involvement.
 - Ablution facilities and security services have been requisitioned. One contributing factor to congestion is drivers leaving trucks unattended and blocking the exit lane.
- **N4 Construction (near Crocodile):**
 - Periodic Stop/Go controls were implemented during the past week.
 - Planned construction works ended last Thursday.

The following table summarises the flows in the last seven days:

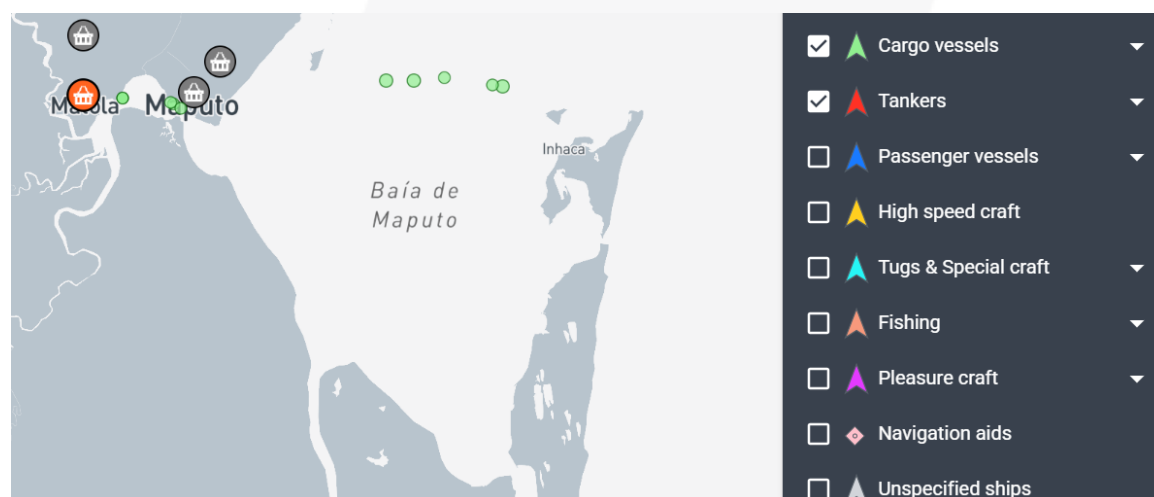
Table 7 – Lebombo border post update

Date 06h00 Daily	Total Trucks Entering KM4	Total Trucks Exit KM4	Mineral Trucks	General Cargo (incl. critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Total Trucks inside KM4 staging	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo
Design Capacity	1 500	1 500	1 200	200	n/a	50	50	2 000	20	10	6	4
07-Jul-25	1 579	1 545	1 458	115	8	57	0	234	10	8	1	1
08-Jul-25	1 676	1 474	1 245	212	34	49	7	295	16	12	1	3
09-Jul-25	1 381	1 315	954	299	22	83	30	249	12	8	1	3
10-Jul-25	1 622	1 590	1 254	248	30	70	35	266	8	5	1	2
11-Jul-25	1 649	1 712	1 257	307	51	81	52	282	13	9	1	3
12-Jul-25	1 745	1 627	1 153	317	42	76	39	250	10	7	1	2
13-Jul-25	1 702	1 869	1 454	236	25	74	79	288	10	7	1	2
% of design capacity	108%	106%	104%	124%	n/a	140%	69%	13%	56%	80%	17%	57%
% change (d/d)	-2%	15%	26%	-26%	-40%	-3%	103%	15%	0%	0%	0%	0%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 13/07/2025.

The following shows a snapshot of the vessels waiting for the Port of Maputo:

Figure 13 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 13/07/2025 at 14:00.

b. SADC cross-border and road freight update

The following table shows the consolidated monthly flow of HGVs across some of the key South African borders for June:

Table 8 – HGVs – Main South African borders (both directions)

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	13 783	-9%	13 728	1%	27 511	-4%
Groblersbrug	6 841	-5%	6 157	-9%	12 998	-7%
Kopfontein	6 470	-6%	621	-1%	7 091	-6%
Ramatlhabama	4 278	-11%	2 352	7%	6 630	-5%
Skilpadshek	7 610	-2%	1 651	-2%	9 261	-2%

Source: TLC & FESARTA, 13/07/2025.

In total, road freight movements across these five main South African border posts are down by **↓5% (m/m)**.

The following developments around cross-border road freight in South Africa and the broader SADC region are noteworthy:

- Overall, the average queue time decreased by approximately **half an hour** from last week, while transit time also decreased by around **half an hour**.
 - The median border crossing times at South African borders decreased by **three-quarters of an hour**, averaging **~10,5 hrs (↓6%)** for the week.
 - In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs (no change)**.
1. **Kopfontein Border Post:**
 - a. Power outage reported on Friday; Immigration closed the border at 17:00 on Saturday.
 - b. Power was restored at 21:19 the same night.
 2. **Musina Area Incident:**
 - a. A collision involving a bus and a truck occurred just before the weighbridge outside Musina.
 - b. The road was fully blocked but cleared to two lanes to restore traffic flow.
 3. **Ndola Bypass (Zambia):**
 - a. The newly completed Abraham Mokola tollgate is operational.
 - b. While it adds costs for transporters, it will reduce delays caused by trucks getting stuck in Ndola town.
 4. **Botswana Unified Revenue Service (BURS) Customs System:**
 - a. System issues reported since early last week.
 - b. Transporters can log in, but tariff codes are not accepted.
 - c. Processing remains operational but very slow.

The following table shows the changes in bidirectional flows through South African and SADC borders:

Table 9 – Delays¹² summary – South African borders (both directions)

Border Post	Direction	HGV ¹³ Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	463	28,6	10,4	29,0	13 890	3 241
Beitbridge	Zimbabwe-SA	456	12,5	2,2	12,3	13 680	3 192
Groblersbrug	SA-Botswana	215	18,4	1,2	18,2	6 450	1 505
Martin's Drift	Botswana-SA	184	2,0	0,3	2,0	5 520	1 288
Kopfontein	SA-Botswana	204	8,1	1,4	8,0	6 120	1 428
Tlokweng	Botswana-SA	19	0,6	0,2	0,4	570	133
Vioolsdrift	SA-Namibia	30	3,9	2,1	3,6	900	210
Noordoewer	Namibia-SA	20	1,3	0,4	1,5	600	140
Nakop	SA-Namibia	30	4,3	0,3	4,2	900	210
Ariamsvlei	Namibia-SA	20	1,3	0,4	1,2	600	140
Skilpadshek	SA-Botswana	256	6,4	2,1	6,2	7 680	1 792
Pioneer Gate	Botswana-SA	52	0,0	0,0	0,0	1 560	364
Lebombo	SA-Mozambique	1 564	4,9	0,5	4,6	46 920	10 948
Ressano Garcia	Mozambique-SA	1 517	1,1	0,2	1,1	45 510	10 619
Sum/Average		5 030	6,7	1,6	6,6	150 900	35 210

Source: TLC, FESARTA, & Crickmay, week ending 06/07/2025.

Table 10 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	15,8	4,1	15,4	9 600	2 240
Central Corridor	798	0,5	0,1	0,5	23 940	5 586
Dar Es Salaam Corridor	1 819	12,7	1,0	12,5	54 570	12 733
Maputo Corridor	3 081	3,0	0,4	2,8	92 430	21 567
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 498	10,3	1,4	10,2	104 940	24 486
Northern Corridor	2 817	0,9	0,0	0,9	92 520	21 588
Trans Caprivi Corridor	338	2,6	0,8	2,5	10 140	2 366
Trans Cunene Corridor	100	2,7	0,8	2,6	3 000	700
Trans Kalahari Corridor	116	22,9	1,1	22,7	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	13 114	5,6	0,7	5,6	401 430	93 667

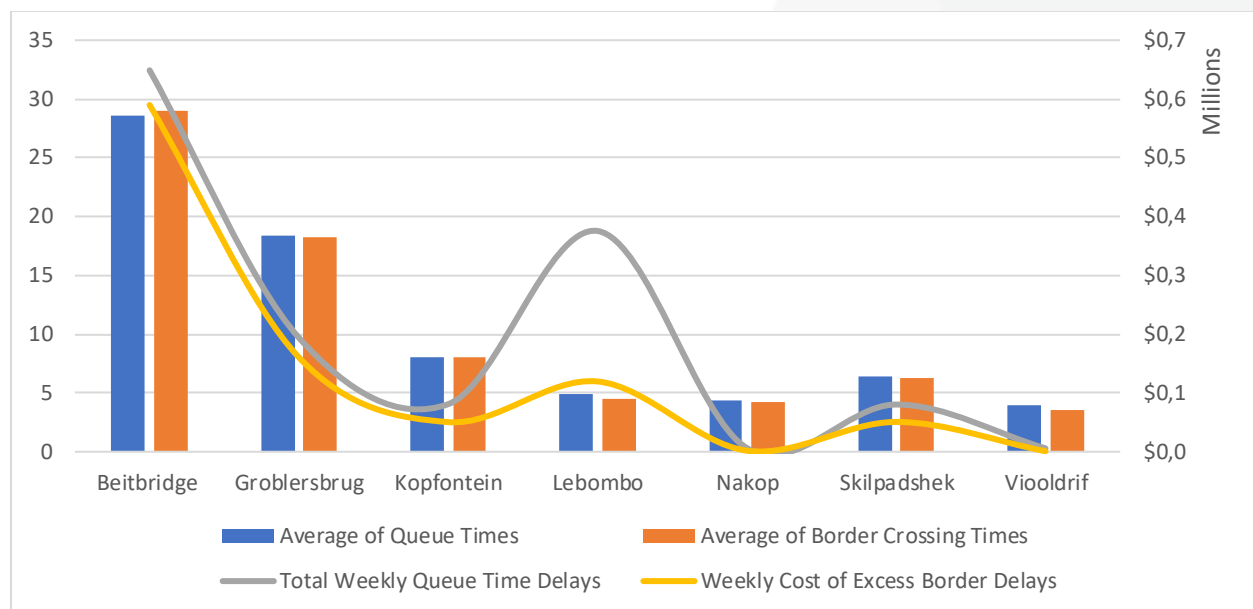
Source: TLC, FESARTA, & Crickmay, week ending 06/07/2025.

The following graph shows the weekly change in cross-border times and associated estimated costs:

¹² Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.

¹³ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

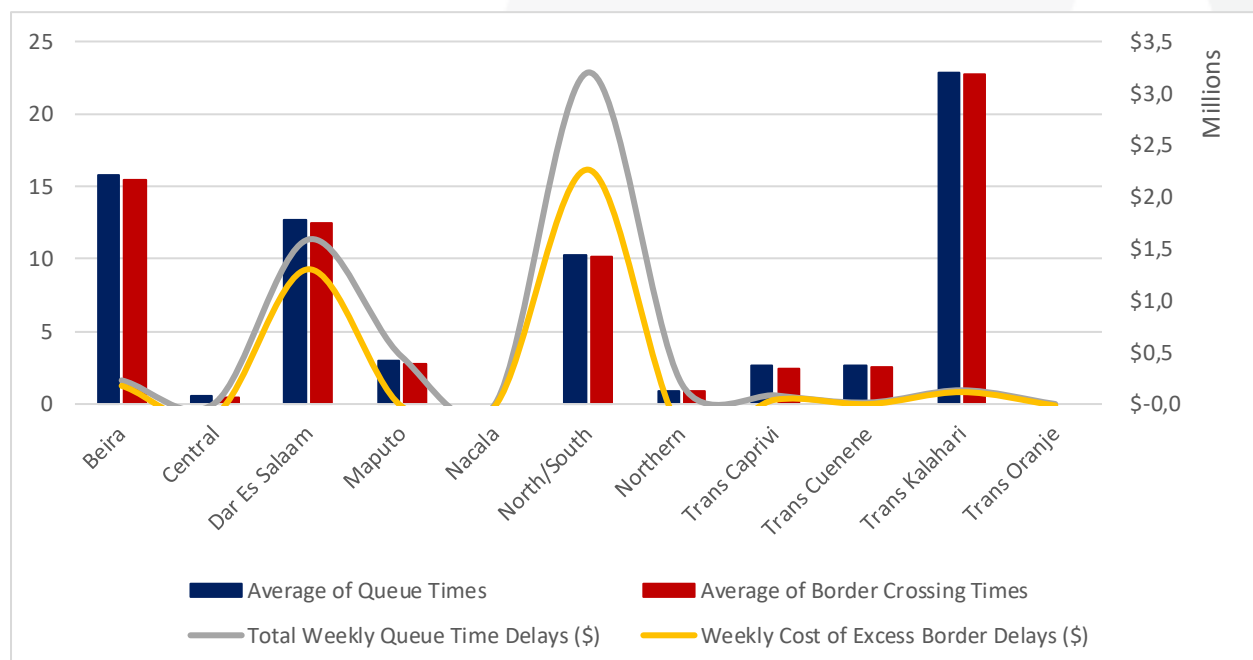
Figure 14 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 06/07/2025.

The following figure echoes those above, this time from a corridor perspective.

Figure 15 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 06/07/2025.

In summary, cross-border queue time averaged **~5,6 hours** (down by **~0,5 hours** from the previous week's **~6,1 hours**), indirectly costing the transport industry an estimated **\$5,9 million (R104 million)**. Furthermore, the week's average cross-border transit times also hovered around **~5,6 hours** (down by **~0,5 hours** from the **~6,1 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$3,5 million (R61 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$9,4 million (R165 million)**, down by **~R6 million** or **↓3,2%** from **~R171 million** in the previous report).

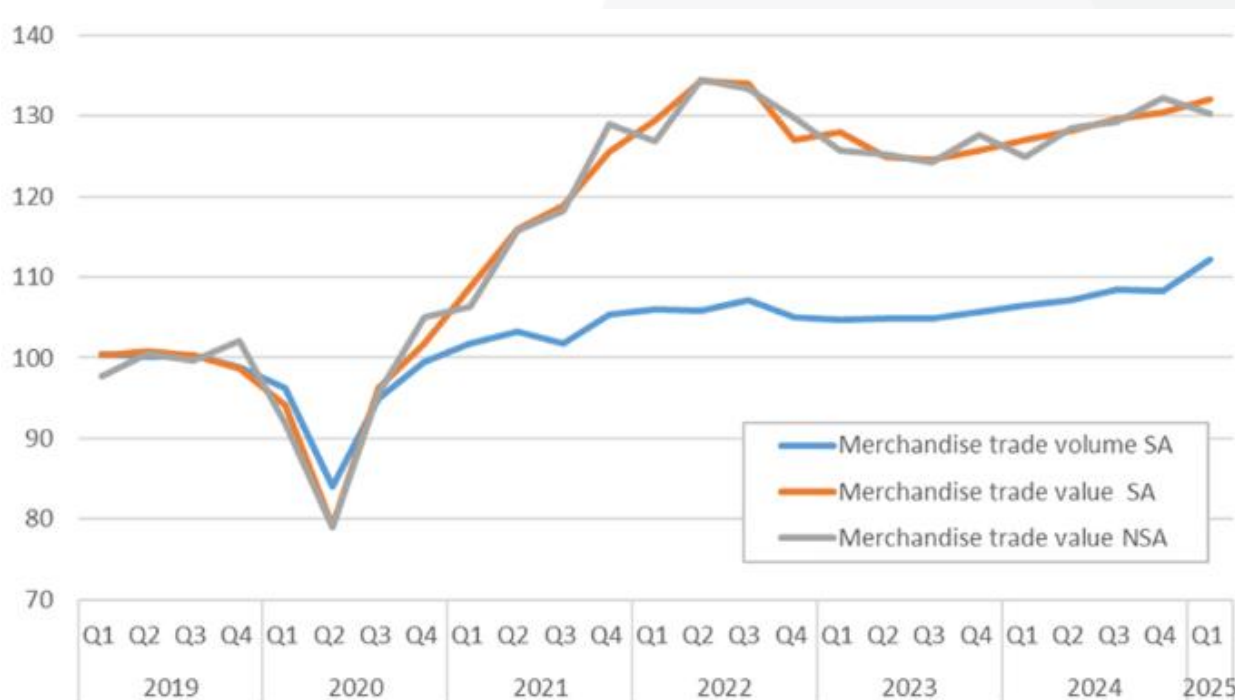
4. International Update

The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** world merchandise trade, **(b)** the global shipping industry, and **(c)** the global aviation industry.

a. World merchandise trade

World merchandise trade volume grew strongly in Q1 2025, exceeding WTO forecasts as importers front-loaded orders before US tariff hikes. North American imports surged **↑13,4%** (q/q) followed by Africa at **↑5,1%**; The Commonwealth of Independent States (CIS) fell **↓0,5%**. Export growth was fastest in the Middle East (**↑6,3%**) and Asia (**↑5,6%**). In dollar terms, world exports rose **~↑4%** (y/y), led by office equipment and chemicals, while automotive and fuels declined. Despite this rebound, WTO forecasts nearly flat trade growth (**↑0,1%**) for all of 2025 amid persistent geopolitical and economic uncertainties.

Figure 16 – World merchandise trade volume and value, 2019 Q1 – 2025 Q1



Source: [WTO](http://www.wto.org)

b. Global shipping industry

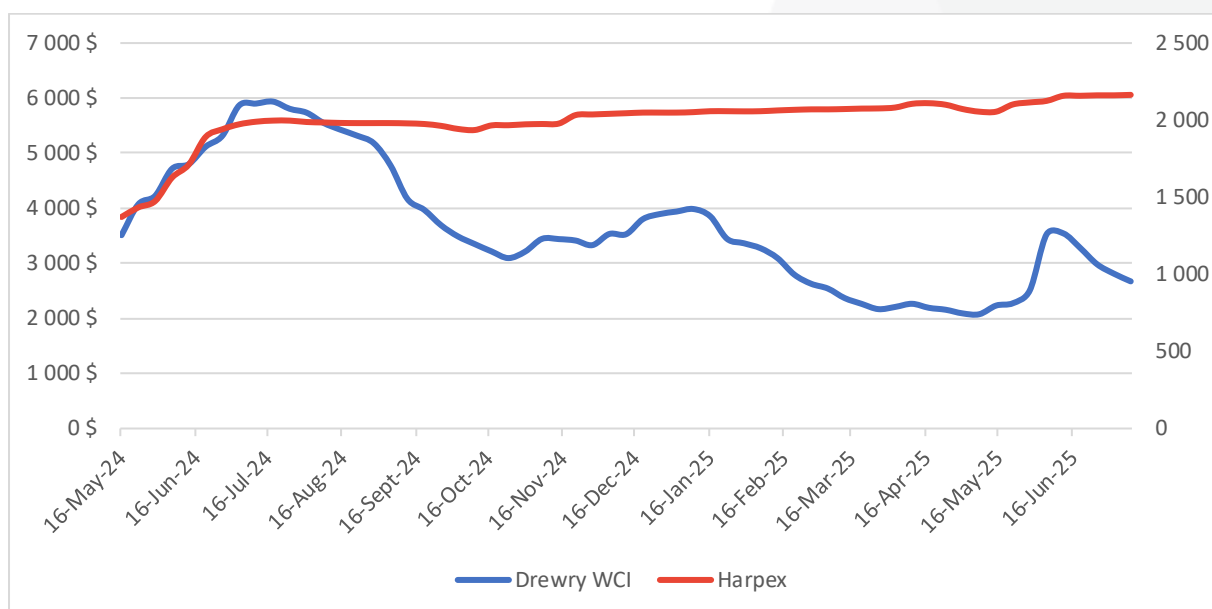
i. Global freight rates

Global spot rates continue to decline, as Drewry's "World Container Index" is down by **↓5%** (or **\$140**) to **\$2 672 per 40-ft container**¹⁴ this week. The index is now down by **↓55%** (y/y), as this week marks the fourth consecutive drop in rates after the massive surge during the US tariff confusion and accompanying frontloading around May/early June. Meanwhile, the *Harper Petersen Index* (Harpex) traded around **2 164 points** on Friday, as charter rates remained robust, as illustrated:¹⁵

¹⁴ Drewry. 10/07/2025. [World Container Index](http://www.drewry.com).

¹⁵ Harpex. 11/07/2025. [Harper Petersen & Co Charter Rate Index](http://www.harpex.com).

Figure 17 – World Container Freight Index (\$ per 40ft) & Harper Petersen Charter Index



Source: Calculated from [Drewry](#) & [Harpex](#)

Elsewhere, security in the Red Sea has worsened, highlighted by the sinking of two bulk carriers, even as Suez Canal traffic patterns adjust with increased transits by mid-sized (4 000 to 7 500 TEU) Container Ships and falling sub-Panamax crossings. Meanwhile, the largest Megamax vessels (18 000+ TEU) continue to avoid the region entirely for the fifteenth consecutive month.

c. Global air cargo industry

In the high-frequency metrics from World ACD, global air cargo tonnages fell by approximately **↓3%** (w/w), mainly due to an **↓11%** drop in volumes from North America, attributed to the US Independence Day holiday.

Figure 18 – Region to region: capacity, chargeable weight, and rates (last two to five weeks, % change)

Origin Regions

last 2 to 5 weeks



	Capacity ¹			Chargeable weight ¹			Rate ¹		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-1%	+6%		-2%	+2%		+2%	+8%
Asia Pacific		+2%	+4%		+1%	+7%		+2%	-2%
C. & S. America		-1%	-1%		-5%	+2%		+0%	-2%
Europe		+1%	+1%		+5%	-0%		+2%	+6%
M. East & S. Asia		-0%	+1%		+9%	+1%		+3%	-9%
North America		-2%	-2%		-3%	+0%		-0%	+0%
Worldwide		-0%	+1%		+1%	+3%		+2%	+0%

Source: [World ACD](#)

Despite this, global average rates increased by **↑2%** (w/w) to **\$2,48/kg**, driven by robust spot market conditions. Capacity remained relatively stable (**↑1%**, 2w/2w), with notable growth out of Africa (**↑8%**, y/y in chargeable weight and **↑6%** in rates). Asia–Europe flows remained steady, with rising rates, while cargo from North America continued to soften. Broader trends point to ongoing modal shifts and carrier capacity realignment amid fluctuating regional demand.

ENDS¹⁶

¹⁶**ACKNOWLEDGEMENT:**

*This initiative – **The Cargo Movement Update** – was developed collectively by the Private Sector at large to provide visibility of the movement of goods during the COVID-19 pandemic. The report is authored by the Southern African Association of Freight Forwarders (SAAFF) and distributed by Business Unity South Africa (BUSA). SAAFF acknowledges the input of several key business partners in compiling these reports, which have become a weekly industry staple.*