Authored by:
www.saaff.org.za

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Cargo Movement Update #248[1]

Date: 24 August 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)	45 442	51 771	**97 213**	46 359	52 817	**99 176**	↓2%
Air Cargo (tons)	4 392	2 699	**7 091**	4 389	2 352	**6 741**	↑5%

Monthly Snapshot

Figure 1 – Cyclical[4] monthly cargo volume, year on year (most metrics: Jul '24 vs Jul '25, % growth)

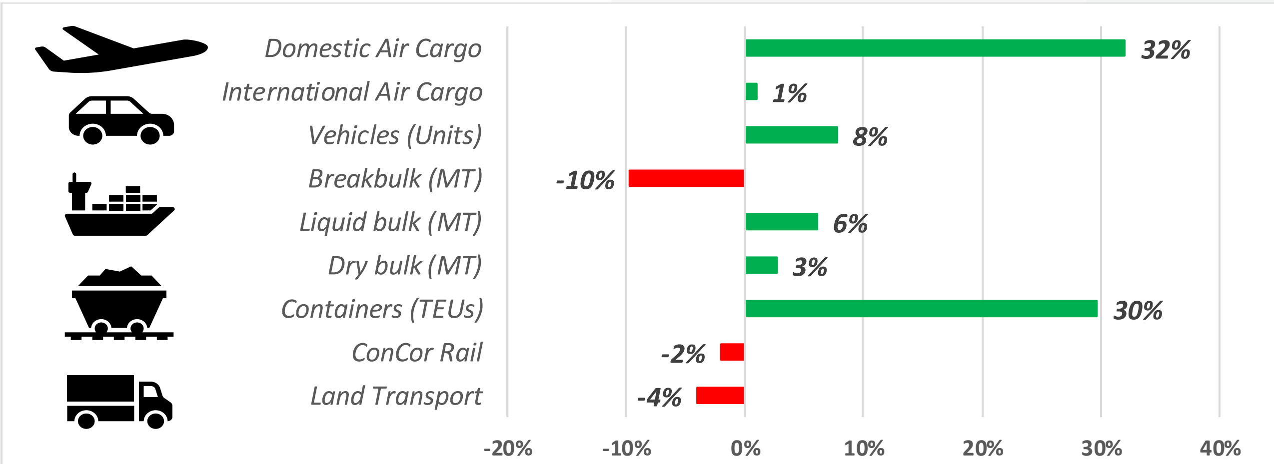
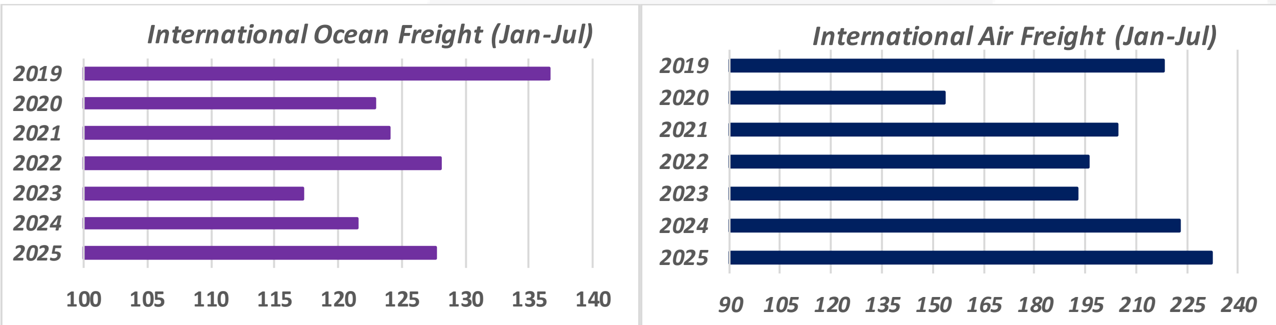


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~13 888 TEUs** was handled per day, with **~12 581 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 954** containers, down by **↓47%** from last week.
- Cross-border queue: **↑1,2 hrs**; transit: **↑1,2 hrs**; SA borders: **~10,7 hrs** (**↑16%**); SADC: **~5,8 hrs** (**↑23%**).
- The top 30 global container ports show a substantial **↑7%** (y/y) increase in throughput for H1 of 2025.
- Global spot rates: down for a 10th straight week (**↓4,3%**, or **$100**) to **$2 250/40ft**. Charter: **↑12%** (y/y).
- Global air cargo tonnage **↓7%** (w/w), as global spot rates remained stable at **$2,64**/kg.

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[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *248th* 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: July vs July.
[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 **13 888 TEUs** was handled daily, a slight decrease from **14 168 TEUs** the previous week. The slight reduction in port throughput this week can be attributed mainly to port operations being characterised by inclement weather, equipment challenges, and vacant berths. Adverse weather, accompanied by poor visibility, ensured operational challenges in Cape Town, as equipment breakdowns, adverse weather, and a port meeting prevented optimal operational performance in Durban. Agent delays, adverse weather conditions, and vacant berths hindered operations at our Eastern Cape Ports. At the same time, several operational hours were conceded at the Port of Richards Bay due to inclement weather. The latest reports from TFR suggest that Intermittent cable theft is still occurring on the line between Pretoria and Durban, while the line between City Deep and Mafikeng is currently experiencing delays of up to 48 hours due to diesel hauling on the line. The latest reports from Maersk indicate that they will cease accepting non-DG charcoal bookings, effective 1 October. Meanwhile, the CMA CGM Rio Grande 534N will skip the Port Louis Eastbound call due to port delays.

Global maritime trade showed resilience in H1 2025, with the world's top 30 container ports recording a **↑7%** (y/y) increase in throughput, led by Chinese, US, and Indian hubs. However, structural challenges persist. The containership orderbook has reached a record **10,4 million TEU**, while scrapping remains minimal, highlighting looming overcapacity risks. Freight rates have continued to decline – down for a tenth consecutive week and down **↓58%** year-on-year – reflecting weak US demand and surplus capacity. Although congestion remains stable, shippers should prepare for sudden blank sailings around China's Golden Week, reinforcing the need for adaptability and proactive supply chain planning. Other developments of note include **(1)** South Korea set to develop their Arctic shipping corridors, and **(2)** Panama Canal to sell the rights to two ports awaiting construction.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~627 000 kg** inbound (**↑0,1%**, w/w) and **~386 000 kg** outbound (**↑15%**). The current levels indicate that cargo is trending at approximately **↑17%** (y/y) above the same level as last year, and about **↑19%** (y/y) above the comparative levels of pre-pandemic 2019.

Operationally, ongoing delays in issuing Foreign Operating Permits are hindering South Africa's air cargo industry, although a recent escalation to the President's office signals a possible resolution. Traders are urged to liaise directly with the DoT's FOP office.

Internationally, Japanese and European holidays lead to a mid-August tonnage drop, as worldwide tonnage falls **↓7%** week-on-week. The steepest declines originated from Europe (**↓11%**) and Asia Pacific (**↓8%**), with Japan–US flows plummeting by **↓53%**. Despite weaker demand, average global spot rates remained only **↓3%** below last year.

Cargo movements along the N4 corridor were stable for road transport and decreased somewhat for rail transport. Truck volumes through the border post remained stable at **1 527 HGVs per day** (**no change**). Queue times halved to an average of **3,4 hours** (**↓50%**) at the border. The average processing time also decreased to an average of **3,3 hours** (**↓20%**, w/w) per crossing. Rail to Maputo increased slightly to an average of **thirteen trains daily** (up by **three** from last week). Sugar trains from Eswatini were stable at around **two trains a day**. Lastly, the derailment on the Ressano Garcia line, which occurred last Friday evening, reopened on Monday, 18 August, supplementing port volumes from rail.

Land border crossing times increased – on average – across the SADC region. Overall, the average queue time increased by approximately **an hour and a quarter** from last week, while transit time increased by the same magnitude. The median border crossing times at South African borders increased by **an hour and a half**, averaging **~10,7 hrs** (**↑16%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) increased by around **an hour**, averaging **~5,8 hrs** (**↓↑%**). This week, on average, three SADC borders took around a day to cross, namely Beitbridge, Kasumbalesa (the worst affected, taking around **a day and three-quarters** from the **Zambian side**), and Zobue/Mwanza OSBP. Other developments of note include **(1)** Lebombo process update, **(2)** delays on domestic South African routes, **(3)** Zimbabwe truck licensing issue and roadblocks, and **(4)** Beitbridge toll plaza proposal.

On Friday, 22 August, Minister of Transport Barbara Creecy announced the outcome of Transnet's slot application process, marking a significant step in South Africa's rail reform journey.[6] Eleven new Train Operating Companies (TOCs) have been approved across 41 routes and six key corridors, with the Transnet Rail Infrastructure Manager estimating an additional **20 million tonnes** of freight per year from 2026/27. This supports the Government's goal of raising rail volumes to **250 million tonnes annually** by 2029. The reform builds on the National Rail Policy (2022) and the Freight Logistics Roadmap (2023), enabling third-party access, stimulating rolling stock investment, and potentially unlocking up to **R100 billion in new capital**.

Ultimately, continued restructuring, reform, and stakeholder collaboration remain vital to ensure these initiatives translate into efficiency gains, improved competitiveness, and higher volumes. As the industry has long emphasised, only through integrated effort can logistics networks meet South Africa's economic growth ambitions.

[6] SA Government. 22/08/2025. Minister Barbara Creecy: Announcement of outcome of Transnet's slot application process.

Contents

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 18 to 24 August (measured in TEUs)

7-day flow reported (18/08/2025 – 24/08/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 033	35 233	↑2%
New Pier (Pier 1)	2 284	15 986	↑15%
Cape Town Container Terminal	2 576	18 030	↑7%
Ngqura Container Terminal	2 371	16 599	↓23%
Port Elizabeth Container Terminal	274	1 916	↓60%
Other	1 350	9 449	↑22%
Total	**13 888**	**97 213**	**↓2%**

Source: Calculated from TPT, 2025. Updated 24/08/2025.

A slightly decreased average of **~13 888 TEUs** (**↓2%**) was handled per day for the last week (*18 to 24 August, Table 2*). Despite the reduction, throughput was still above the projected average of **~12 581 TEUs** (**↑10%** actual versus projected).

For the coming week, a decreased average of **~12 105 TEUs** (**↓13%**) is predicted to be handled (*25 to 31 August*, *Table 3*).

The slight reduction in port throughput this week can be attributed mainly to port operations being characterised by inclement weather, equipment challenges, and vacant berths.

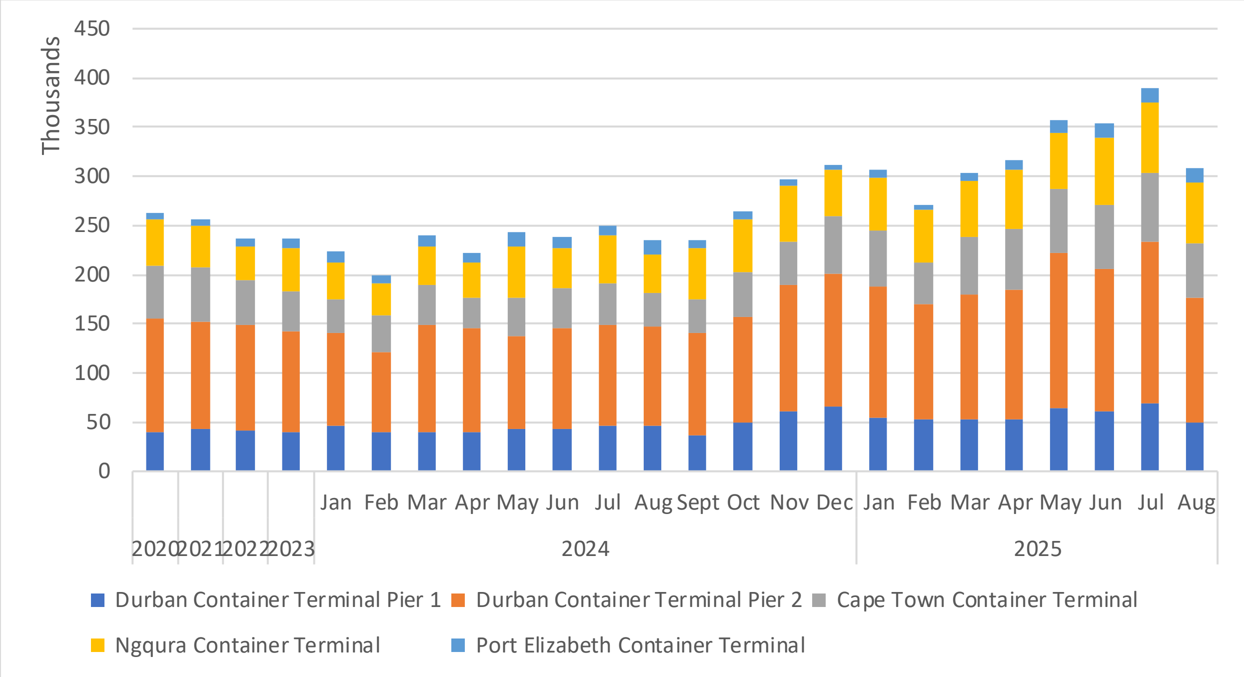
Table 3 – Container Ports – Weekly flow projected for 25 to 31 August (measured in TEUs)

7-day flow projected (25/08/2025 – 31/08/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 048	35 339	↑0,3%
New Pier (Pier 1)	1 935	13 545	↓15%
Cape Town Container Terminal	2 123	14 858	↓18%
Ngqura Container Terminal	1 716	12 015	↓28%
Port Elizabeth Container Terminal	403	2 824	↑47%
Other	879	6 156	↓35%
Total	**12 105**	**84 737**	**↓13%**

Source: Calculated from TPT, 2025. Updated 24/08/2025.

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.

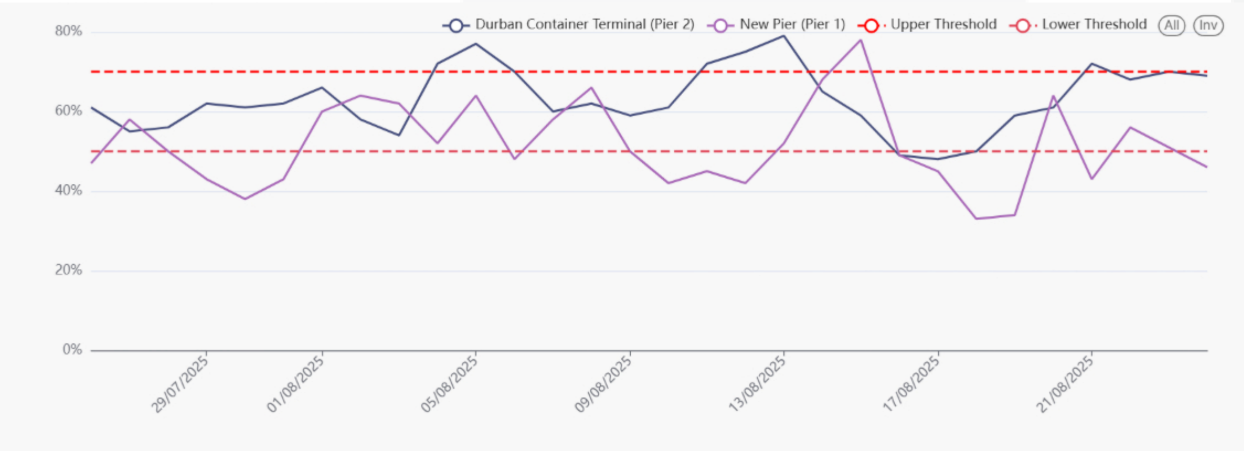
Figure 3 – Monthly flow reported for total container movement (thousands, 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 24/08/2025.

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

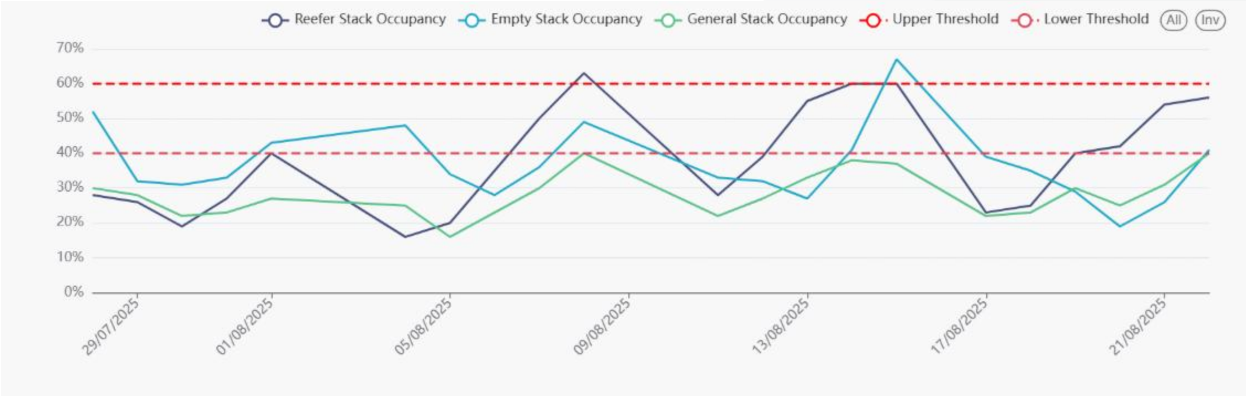
Figure 4 – Stack occupancy in DCT, general-purpose containers (21 July to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 24/08/2025.

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 (28 July to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 24/08/2025.

b. Summary of port operations

i. Weather and other delays

- Adverse weather, accompanied by poor visibility, ensured operational challenges in Cape Town.
- Equipment breakdowns, adverse weather, and a port meeting prevented optimal operational performance in Durban.
- Agent delays, adverse weather, and vacant berths subdued operations at our Eastern Cape Ports.
- Several operational hours were conceded at the Port of Richards Bay due to inclement weather.

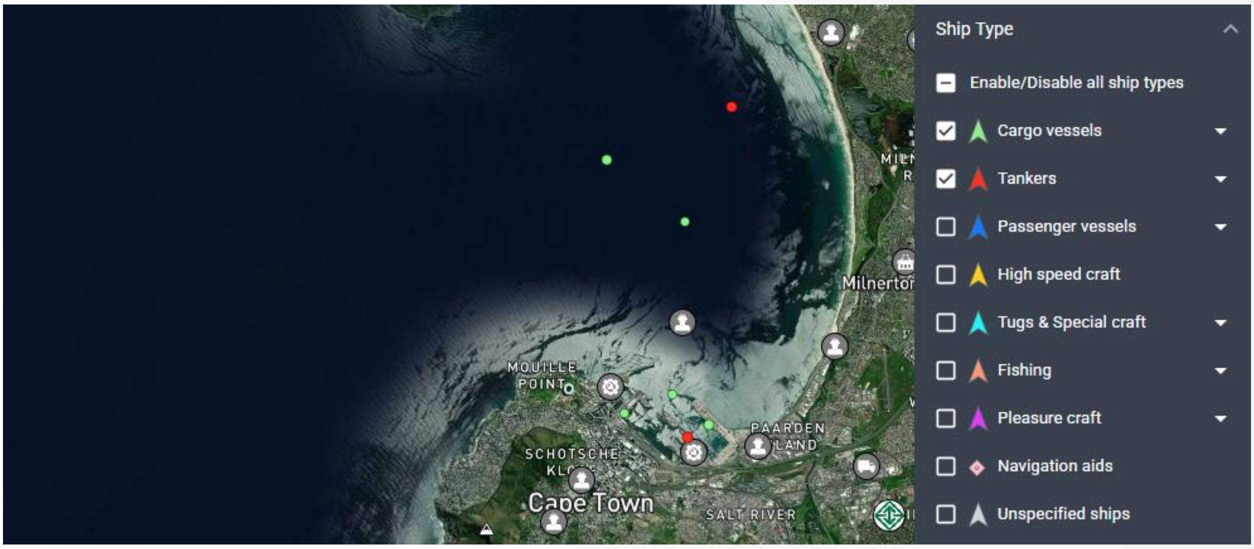
ii. Cape Town

On Thursday, CTCT recorded three vessels at berth and none at anchor, as adverse weather and poor visibility proved to be the primary operational constraints at the port. On the landside, between Monday and Thursday, the terminal managed to service at least 4 313 trucks while handling approximately 241 rail units. On the waterside, the terminal executed approximately 4 516 container moves across the quay during the same period. Additionally, this week the terminal operated with **eight STS cranes**, between **21-23 RTGs**, and around **58-59 hauliers**. Crane LC1 was the most notable crane absentee before the weekend, with the machine expected back in service over the weekend.

On Thursday, CTMPT recorded two vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 2 400 tons of cement and 469 container moves on the waterside. On the landside, 459 trucks were processed during the same period. Stack occupancy was recorded at 28% for general cargo, 0% for reefers, and 55% for empties. For the majority of the week, the terminal operated with two cranes and four straddle carriers. Towards the end of the week, the Crane LM400 was out of commission, with the machine expected to be back in service over the weekend.

Between 11 and 17 August, the FPT terminal handled five vessels: two multi-cargo, one breakbulk, one container, and one layby vessel. Berth occupancy during this period was recorded at 42%. The terminal planned to handle nine more vessels between 18 and 24 August, with another seven vessels scheduled between 25 and 31 August. Inclement weather, the late arrival of cargo, and equipment challenges accounted for the most significant operational constraints during this period.

Figure 6 – Cape Town vessel view (per vessel group)



Source: Marine Traffic. Updated 24/08/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded one vessel on berth, with one vessel at anchor. Between Monday and Thursday, the terminal executed at least 4 653 gate moves and 167 rail moves on the landside. The **average TTT** for the week was **~55 minutes** (**↑26%, w/w**) and an average **staging time** of **~29 minutes** (**↑4%**). Additionally, the terminal moved over 6 100 TEUs across the quay on the waterside during the same period. The terminal had between **four and five STS cranes** and **14-16 RTGs** available for the majority of the week.

Pier 2 had three vessels on berth and none at anchorage on Thursday, as equipment breakdowns, adverse weather, and a port meeting prevented optimal operational performance this week. The terminal operated with **8-9 gangs** and moved over **10 400** containers across the quay between Monday and Thursday on the waterside. Approximately **10 155** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~69 minutes** (**↓18%, w/w**) and an average **staging time** of **~72 minutes** (**↓38%**). Approximately 1 526 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **62** and **70** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **61%** during this period.

Durban's MPT terminal recorded one vessel at berth on Wednesday and none at outer anchorage. Stack occupancy for containers was recorded at 35%, the reefer stack at 39%, and the breakbulk stack at 45%. In the preceding 24 hours, 750 containers were handled on the waterside. On the landside, 462 container trucks were serviced at a TTT of ~36 minutes. Additionally, 103 breakbulk trucks, containing 3 201 tons, were serviced. During this period, three cranes, nine reach stackers, six forklifts, and 21 ERFs were in operation. The latest reports from TPT indicate that the fourth crane is only scheduled to return to service around December 21.

Between Sunday and Monday, the Maydon Wharf MPT recorded one vessel at berth and zero at anchorage. On the waterside, 130 tons were handled, while 23 trucks, containing 1 201 tons, and 28 wagons containing 976 tons were handled on the landside. During the same period, the agri-bulk facility had zero vessels at berth and zero vessels at anchor.

On Wednesday, the Ro-Ro terminal in Durban had one vessel on the berth and one at anchorage. In the preceding 24 hours, the terminal handled 688 road units and 86 units on rail on the landside, while 2 452 units were handled on the waterside. Overall stack occupancy was 77%, 5% at Q&R, and 20% at G-berth. During this period, the terminal had 118 high-and-heavy units (abnormal loads) on hand and managed to handle 33.

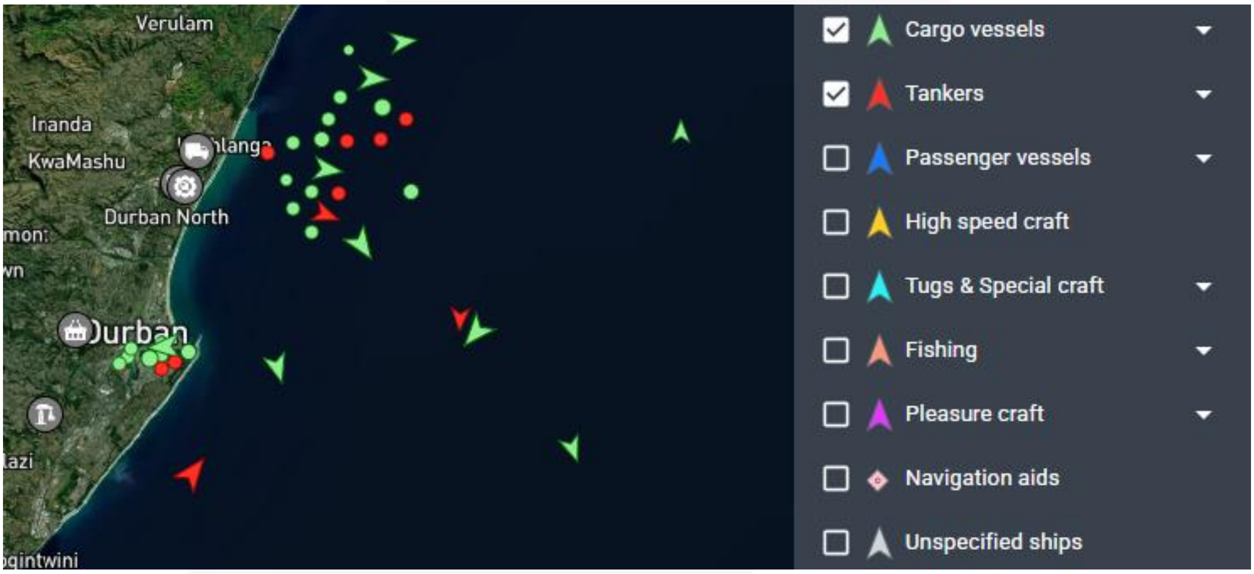
The following figure summarises the performance of Durban's container terminals for the last two weeks, focusing on gate moves and time spent in the terminals.

Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)

Source: Calculated using data from Transnet, 2024, and updated 24/08/2025.

The queue of container vessels waiting outside Durban has increased slightly since last week. On Monday evening (25 August), **two** container vessels were waiting outside the anchorage at Pier 1, **three** for Pier 2, and **none** for Point. The queue of dry (**three**), liquid (**four**), and breakbulk (**four**) vessels has also increased slightly since last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 24/08/2025 at 14:00.

Lastly, since June 2025, the Transnet National Ports Authority has advanced the Bayhead Road rehabilitation seamlessly from Phase 1 to Phase 2 – focusing on rebuilding and reinforcing both outbound and inbound carriageways while implementing safety enhancements and engaging stakeholders to improve access and operations at the Port of Durban.[7]

iv. Richards Bay

On Thursday, the Port of Richards Bay had 13 vessels at anchor and 14 on the berth, translating to four vessels at DBT, five at MPT, five at RBCT, and none at the liquid bulk terminal. Two tugs and one pilot boat were deployed to support marine resources towards the end of the week. The port helicopter went out of commission earlier this week for planned maintenance and is expected to return to service over the weekend. Operations were impacted by adverse weather towards the end of the week.

The daily average coal throughput for the week nearly doubled since last week and averaged around **159 000 tons** (**↓33%**, w/w) a day. An average of **23 trains** was serviced on the landside (up by **two** from last week), and slightly above the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded three vessels on berth and one at anchor, with three vessels 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 20% for reefers, 73% for reefer ground slots, and 44% for the general stack. Despite experiencing agent delays, the terminal handled approximately 3 347 TEUs and 259 reefers on the waterside. Approximately 339 trucks were processed on the landside at a TTT of ~32 minutes. For the majority of the week, the terminal had 7-8 STS cranes, between 24 and 26 RTGs, and between 50 and 54 hauliers in service.

On Wednesday, GCT had one vessel at berth and one 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, 228 trucks were processed at a TTT of ~36 minutes on the landside, while 1 136 TEUs and 474 reefers were handled across the quay on the waterside. Stack occupancy was recorded at 24% for the general stack, 29% for reefers, and 18% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and eight straddles in service.

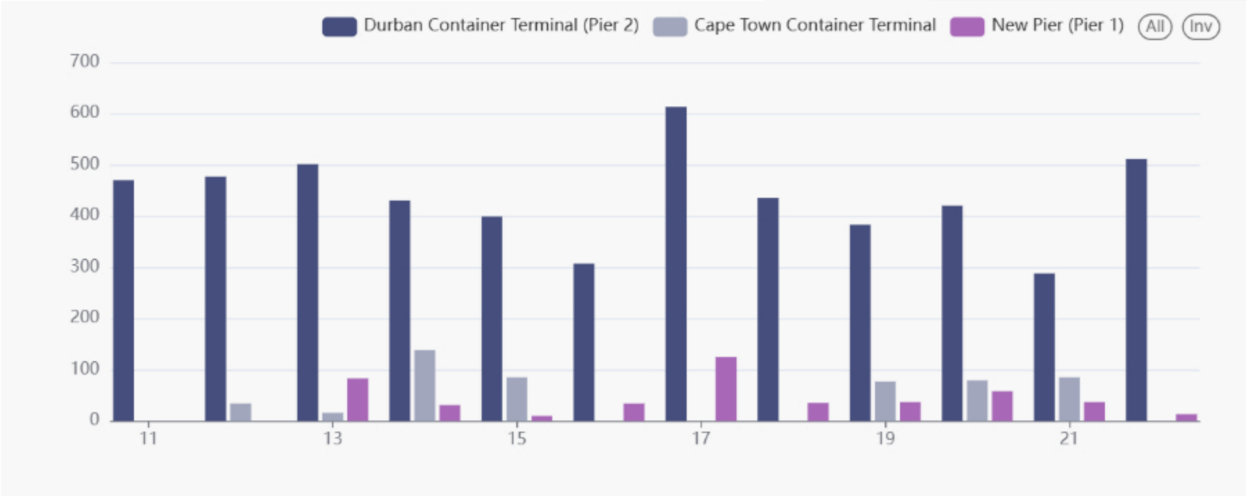
On Tuesday, the Ro-Ro terminal had zero vessels on berth and zero at outer anchorage. During the preceding 24 hours, the terminal handled around 623 units on the waterside, resulting in a stack occupancy of 30%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that Intermittent cable theft is still occurring on the line between Pretoria and Durban, resulting in operational delays. Additionally, the line between City Deep and Mafikeng is currently experiencing delays of up to 48 hours due to diesel hauling on the line. Towards the end of the week, DCT Pier 2 had 357 ConCor units on hand with a dwell time of 48 hours and 329 over-border units with a dwell time of 58 days.

[7] FTW. 20/08/2025. Bayhead Road revamp on track.

Figure 9 – TFR: Rail handled (Pier 1, Pier 2, and CTCT)



Source: Calculated using data from Transnet, 2024. Updated 24/08/2025.

In the last week (*18 to 24 August*), rail cargo on the ConCor line out of Durban was reported at **2 954** containers, down by a significant **↓47%** from the previous week's **5 619** containers.

vii. General Update

The latest reports from Maersk indicate that they will cease accepting non-DG charcoal bookings, effective 1 October. Only DG charcoal bookings from pre-audited shippers are acceptable, subject to the specified requirements. All Charcoal bookings must obtain loading acceptance with Maersk.

Additionally, the latest reports from CMA suggest that the CMA CGM Rio Grande 534N will omit the Port Louis East Bound call due to delays at the port and will subsequently proceed directly to Tanjung Pelepas. As a result, all Durban exports, as well as Port Louis exports and transhipments, will be amended to the Cezanne 535N.

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 (*18 to 24 August*).[8] For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *August 2024* averaged **~887 000 kg**.

Table 4 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	**627 441**	**4 392 090**	**↑0,1%**
Volume outbound	**385 569**	**2 698 985**	**↑15%**
Total	**1 013 011**	**7 091 075**	**↑5%**

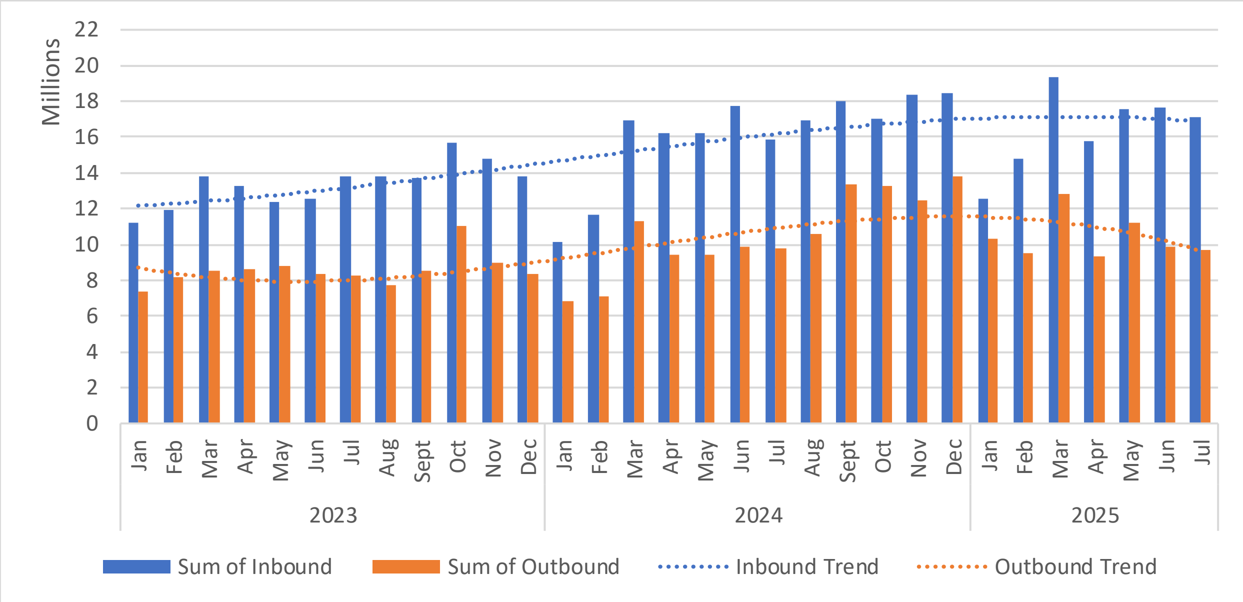
Courtesy of ACOC. Updated: 24/08/2025.

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

The daily average of air cargo handled at ORTIA in the previous week amounted to **~627 000 kg** inbound (**↑0,1%**, w/w) and **~386 000 kg** outbound (**↑15%**). The current levels indicate that cargo is trending at approximately **↑17%** (y/y) above the same level as last year, and about **↑19%** (y/y) above the comparative levels of pre-pandemic 2019.

The following figure shows the international air cargo flows to and from OR Tambo since the start of 2020:

Figure 10 – International cargo for OR Tambo – volumes per month (kg millions)



Calculated from ACOC. Updated: 24/08/2025.

b. Air cargo operations

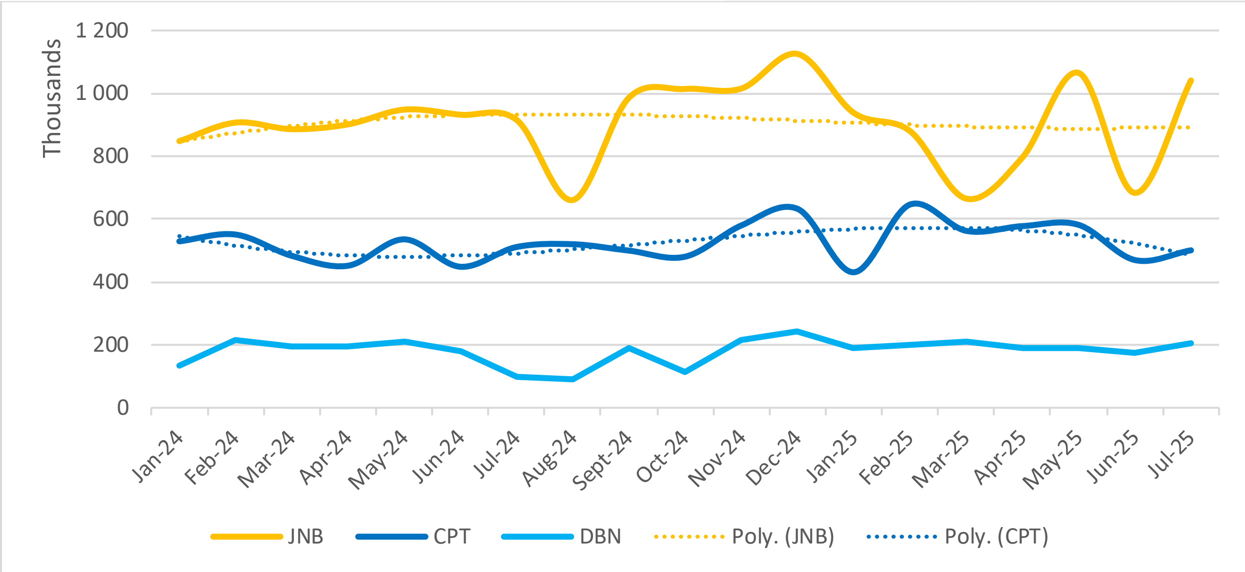
The following air cargo operations are worth noting this week, with much of the discourse adding to the recent narrative in the industry:

1. **Foreign Operating Permits (FOPs)**
   a. Persistent delays and administrative bottlenecks in issuing Foreign Operating Permits continue to undermine competitiveness in South Africa's air cargo industry. Operators are frustrated as some carriers operate without valid permits, while others face protracted approval timelines—months compared to a week in Botswana.
   b. Encouragingly, the matter has now been escalated to the President's office, offering a glimmer of hope that overdue reforms in process efficiency and accountability may soon follow. Traders are encouraged to contact the DoT's FOP office directly for assistance (Permits@DOT.gov.za).

c. Domestic air cargo

The following figure shows the movement since the start of last year, with the rebound for July noticeable:

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 24/08/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*18 to 24 August*), cargo movements along the N4 corridor were stable for road transport and decreased somewhat for rail transport. The following notes summarise the recent developments:

- For this week, truck volumes through the border post were stable at **1 527 HGVs per day** (**no change**). Queue times halved to an average of **3,4 hours** (**↓50%**) at the border.
- The average processing time also decreased to an average of **3,3 hours** (**↓20%**, w/w) per crossing.
- The rail to Maputo increased slightly to an average of **thirteen trains daily** (up by **three**).
- Sugar trains from Eswatini were stable at around **two trains a day**.
- Lastly, the derailment on the Ressano Garcia line last Friday evening reopened on Monday, 18 August – supplementing port volumes from rail.

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

Table 5 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4	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**
Average	**1 527**	**1 500**	**1 120**	**228**	**31**	**91**	**48**	**287**	**13**	**10**	**2**	**2**
% (w/w)	**0%**	**1%**	**-3%**	**5%**	**7%**	**13%**	**7%**	**6%**	**18%**	**22%**	**36%**	**-5%**
% of design capacity	**106%**	**92%**	**96%**	**126%**	**n/a**	**179%**	**99%**	**15%**	**50%**	**94%**	**43%**	**36%**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 24/08/2025.

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

Figure 12 – Maputo vessel view (per vessel group)

Source: Marine Traffic. Updated 24/08/2025 at 14:00.

b. SADC cross-border and road freight update

Notable trends this week in cross-border road freight within South Africa and the broader SADC region:

- Overall, the average queue time increased by approximately **an hour and a quarter** from last week, while transit time increased by the same magnitude.
- The median border crossing times at South African borders increased by **an hour and a half**, averaging **~10,7 hrs** (**↑16%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by around **an hour**, averaging **~5,8 hrs** (**↓↑%**).

1. **Lebombo Border Post**
    a. All trucks, regardless of cargo type, are now required to proceed to KM7 and comply with the full set of processes.
    b. Change implemented approximately three weeks ago to harmonise traffic flows.
2. **South Africa (Domestic route delays)**
    a. **N3 (Heidelberg Road):** Protest action disrupted flows on Wednesday, 19 August, with lanes blocked with burning tyres. Law enforcement was notified, and motorists were advised to use alternative routes.
    b. **N4 (ATKV Buffelspoort):** Collision earlier on Friday, 22 August, causing delays.
3. **Zimbabwe truck licensing issue**
    a. A foreign transporter fined by CBRTA due to the new Zimbabwe licence format showing “D” instead of “DG”. The issue is widespread; FESARTA is engaging with officials to find a resolution, but no progress has been made yet.
4. **Zimbabwe roadblocks**
    a. Growing complaints from internal groups regarding multiple roadblocks between Beitbridge and Masvingo. The Cross Border Traders 4ED Association has called for their removal, citing obstruction to commerce.
5. **Beitbridge toll plaza proposal**
    a. Discussions continue on a proposed toll plaza near Beitbridge, despite Transporters arguing the route is already heavily taxed.
    b. The industry has reiterated that any toll should be located on the bypass road, not affecting Musina–border traffic.

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

Table 6 – Delays[9] summary – South African borders (both directions)

Border Post	Direction	HGV[10] 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	496	23,2	6,1	23,2	14 880	3 472
Beitbridge	Zimbabwe-SA	472	12,1	2,5	12,1	14 160	3 304
Groblersbrug	SA-Botswana	239	18,5	1,6	18,3	7 170	1 673
Martin's Drift	Botswana-SA	214	2,6	0,4	2,3	6 420	1 498
Kopfontein	SA-Botswana	218	10,8	1,1	10,5	6 540	1 526
Tlokweng	Botswana-SA	27	0,6	0,2	0,3	810	189
Vioolsdrift	SA-Namibia	30	3,3	1,3	3,2	900	210
Noordoewer	Namibia-SA	20	2,2	0,4	2,1	600	140
Nakop	SA-Namibia	30	4,3	0,5	4,3	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,4	1,1	600	140
Skilpadshek	SA-Botswana	266	12,9	1,6	12,6	7 980	1 862
Pioneer Gate	Botswana-SA	60	0,0	0,0	0,0	1 800	420
Lebombo	SA-Mozambique	1 526	3,4	1,3	3,3	45 780	10 682
Ressano Garcia	Mozambique-SA	1 453	2,5	0,2	2,3	43 590	10 171
Sum/Average		**5 071**	**7,0**	**1,3**	**6,8**	**152 130**	**35 497**

Source: TLC, FESARTA, & Crickmay, week ending 17/08/2025.

Table 7 – Delays summary – Corridor perspective

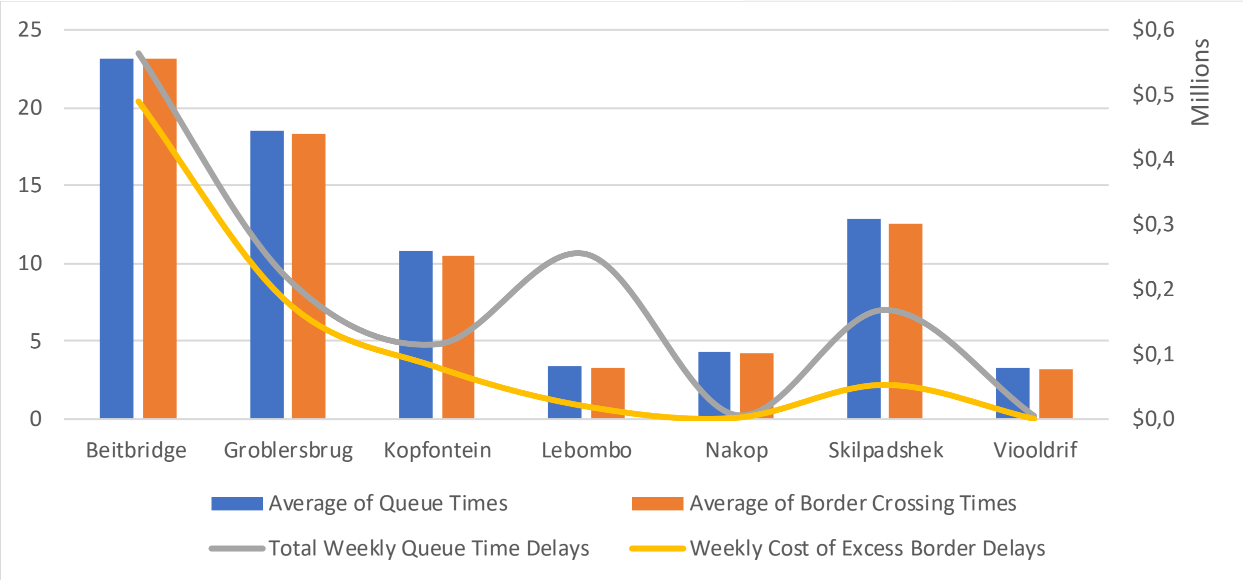
Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	13,5	4,8	13,3	9 600	2 240
Central Corridor	798	2,0	0,3	1,8	23 940	5 586
Dar Es Salaam Corridor	1 819	13,4	1,1	13,4	54 570	12 733
Maputo Corridor	2 979	3,0	0,8	2,8	89 370	20 853
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 623	12,8	1,7	12,6	108 690	25 361
Northern Corridor	2 817	1,7	0,3	1,6	92 520	21 588
Trans Caprivi Corridor	356	4,2	0,6	4,0	10 680	2 492
Trans Cunene Corridor	100	2,8	0,6	2,7	3 000	700
Trans Kalahari Corridor	116	11,4	2,9	11,2	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	**13 155**	**6,4**	**1,0**	**6,3**	**402 660**	**93 954**

Source: TLC, FESARTA, & Crickmay, week ending 17/08/2025.

[9] 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.
[10] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

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

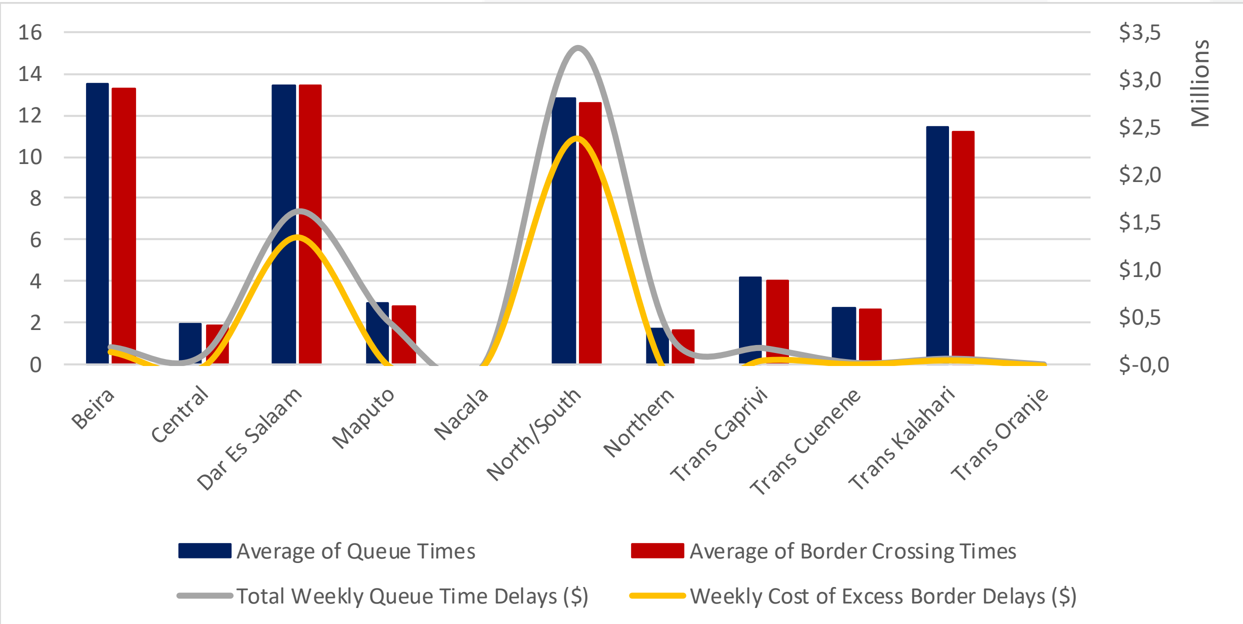
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 17/08/2025.

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

Figure 14 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 17/08/2025.

In summary, cross-border queue time averaged **~6,4 hours** (up by **~1,2 hours** from the previous week's **~5,3 hours**), indirectly costing the transport industry an estimated **$6,2 million** (**R109 million**). Furthermore, the week's average cross-border transit times also hovered around **~6,3 hours** (up by **~1,2 hours** from the **~5,1 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,7 million** (**R65 million**). As a result, the total indirect cost for the week amounts to an estimated **~$9,9 million** (**R174 million**, up by **~R29 million** or **↑20%** from **~R145 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)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Global port throughput

Alphaliner's latest review of the top 30 global container ports shows a substantial **↑7%** year-on-year increase in throughput for the first half of 2025, signalling widespread resilience in maritime trade:

Figure 15 – Top-30 global port throughput in H1 (FY 2024 ranking in brackets)

Rank mid 2025	Rank end 2024	Port	Country	1H 2025	1H 2024	Growth 1H 25/24	FY 2024	Growth FY 24/23
1	(1)	Shanghai	China	27,064,100	25,510,000	6.1%	51,508,000	4.8%
2	(2)	Singapore	Singapore	21,715,419	20,249,739	7.2%	41,124,045	5.4%
3	(3)	Ningbo-Zhoushan	China	21,050,000	19,160,000	9.9%	39,300,800	11.3%
4	(4)	Shenzhen	China	17,230,000	15,550,000	10.8%	33,398,600	11.8%
5	(5)	Qingdao	China	16,380,000	15,190,000	7.8%	30,870,000	7.3%
6	(6)	Guangzhou	China	13,640,000	12,660,000	7.7%	26,070,000	3.8%
7	(7)	Busan	S Korea	12,683,020	12,249,910	3.5%	24,402,022	5.4%
8	(8)	Tianjin	China	12,247,800	11,885,000	3.1%	23,292,500	5.0%
9	(9)	LA/LB	US	9,702,444	9,023,027	7.5%	19,947,077	19.8%
10	(10)	Dubai	UAE	7,774,000	7,337,000	6.0%	15,536,000	7.3%
11	(12)	Port Kelang	Malaysia	7,327,909	7,122,795	2.9%	14,644,527	4.1%
12	(13)	Rotterdam	Netherlands	7,026,000	6,841,000	2.7%	13,822,000	2.8%
13	(15)	Antwerp-Bruges	Belgium	6,910,000	6,665,000	3.7%	13,517,000	8.1%
14	(16)	Tanjung Pelepas	Malaysia	6,872,112	5,956,301	15.4%	12,253,309	16.9%
15	(11)	Hong Kong	China	6,534,000	6,766,000	-3.4%	13,688,000	-5.0%
16	(14)	Xiamen	China	5,938,600	5,874,700	1.1%	12,255,700	-2.4%
17	(19)	Tanger Med	Morocco	n.a.	n.a.	n.a.	10,241,392	18.8%
18	(17)	Laem Chabang	Thailand	5,109,800	4,625,316	10.5%	9,554,700	7.7%
19	(21)	Beibu Gulf	China	4,760,000	4,320,000	10.2%	9,020,000	12.5%
20	(18)	Kaohsiung	Taiwan	4,516,808	4,620,067	-2.2%	9,228,418	4.5%
20	(20)	Ho Chi Minh City	Vietnam	n.a.	n.a.	n.a.	9,158,200	10.2%
22	(22)	NY/NJ	US	4,417,282	4,210,653	4.9%	8,697,767	11.4%
23	(25)	Mundra	India	n.a.	4,059,000	n.a.	8,231,000	13.8%
24	(23)	Hamburg	Germany	4,200,000	3,841,505	9.3%	7,795,313	1.2%
25	(26)	Colombo	Sri Lanka	3,972,053	3,890,474	2.1%	7,792,069	12.1%
26	(24)	Jakarta	Indonesia	3,900,000	3,600,000	8.3%	7,600,000	4.3%
27	(28)	Haiphong	Vietnam	n.a.	n.a.	n.a.	7,150,600	12.8%
28	(32)	Cai Mep	Vietnam	n.a.	n.a.	n.a.	7,082,600	29.2%
29	(27)	Nhava Sheva	India	3,874,394	3,363,415	15.2%	7,052,689	11.0%
30	(29)	Rizhao	China	3,660,000	3,360,000	8.9%	6,710,000	7.2%

Source: Alphaliner

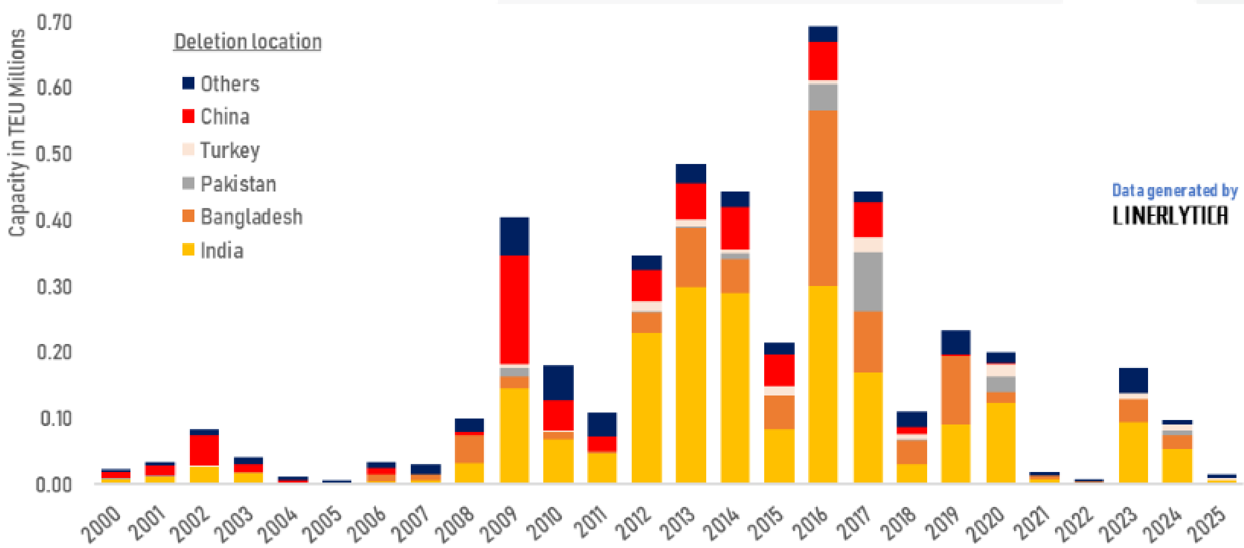
The growth was almost universal, with only Hong Kong and Xiamen registering modest declines, while the majority of ports benefited from rising demand and capacity utilisation. Chinese ports, alongside key hubs in the United States and the Indian subcontinent, were the primary drivers of growth, reflecting both robust regional trade flows and strategic investments in port infrastructure. The top 10 in the rankings remained unchanged, with the Port of Shanghai retaining the top spot at **27 million TEUs** for H1 2025. Second was Singapore at **21,7 million**, and third was Ningbo-Zhoushan at **21 million**.

The results also highlight how supply chain recovery and stabilising vessel schedules have supported higher productivity across most major gateways. Overall, the top ports collectively underscore the importance of scale and adaptability in sustaining the momentum of global trade.

ii. Container scrapping

As reported last week, the containership orderbook – the total volume of containership capacity currently contracted and scheduled for future delivery but not yet delivered – has reached a record high of **10,4 million TEU**. So far this year, only **12 containerships** with a combined capacity of **8 465 TEU** have been scrapped, alongside a further six vessels either lost at sea or repurposed. While this reflects a notably low level of vessel deletions, the far greater challenge lies ahead: the rapidly expanding orderbook can only be balanced through a substantial acceleration in scrapping activity. By 2030, at least **4,5 million TEU** will need to be removed from the global fleet—an amount equivalent to the total capacity scrapped over the past quarter-century.

Figure 16 – Containership deletions by year (2000 to 2025)



Source: Linerlytica

iii. Global container market summary

Shipping lines have so far scheduled significantly fewer blank sailings for the upcoming 2025 Chinese Golden Week – and the associated four-week period—than usual across Transpacific trade lanes, according to Sea Intelligence.[11] Only approximately **3,8%** capacity reduction on the Asia–North America West Coast route (versus **15,4%** in 2024 and a **9,3%** pre-pandemic average), and just **4,8%** on the East Coast route (versus

[11] Murphy, A. 27/08/2025. Expect more Golden Week blank sailings.

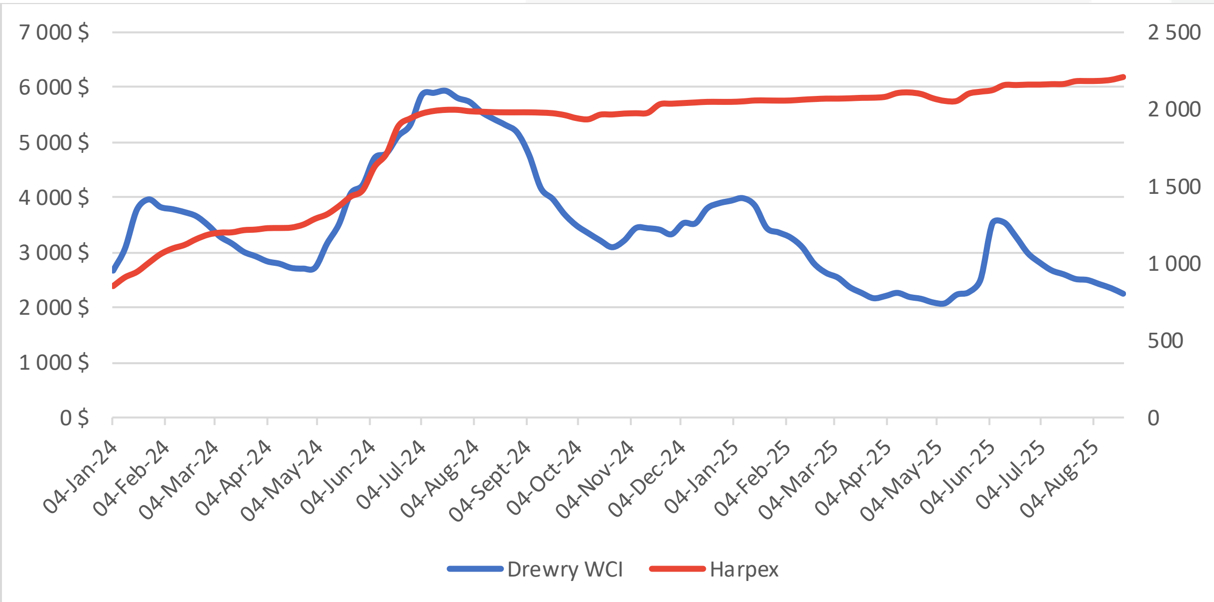
11,9% in 2024 and **11,4%** historically). Given that carriers have increasingly been announcing cancellations much closer to departure dates in uncertain markets, the analysis suggests a substantial likelihood of additional, last-minute blank sailings in the weeks ahead. Shippers are thus advised to anticipate and plan for these potential sudden capacity reductions to manage disruptions effectively.

Elsewhere, port congestion has remained stable this week and is trending around **2,7 million TEU**, accounting for **8,3% of the current fleet**.[12]

iv. Global freight rates

Drewry's "*World Container Index*" declined for the tenth consecutive week, reflecting a continued reduction in rates after a volatile period marked by US tariff-induced surges in May and June, and subsequent sharp declines until mid-July, with the pace of decreases now slowing. Overall, the rate is down by **↓4,3%** (or **$100**) to **$2 250 per 40-ft container**.[13] Two significant drivers of the overall index – Transpacific and Asia–Europe spot rates declined further this week, and Drewry expects continued downward pressure on rates amid weaker US demand, excess vessel capacity, and potential new tariff measures in the second half of 2025. Overall, rates are down by **↓58%** (y/y). Meanwhile, the *Harper Petersen Index* (Harpex) continues to rally and traded around **2 210 points** on Friday (**↑12%**, y/y). The following figure illustrates the indices since the start of last year, with the divergence between the two evident in the previous 12 months:

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



Source: Calculated from Drewry & Harpex

[12] Linerlytica. 25/08/2025. Market Pulse – Week 34.
[13] Drewry. 22/08/2025. World Container Index.

v. Further developments of note

Apart from the overview provided above, there were some additional noteworthy developments this week:

1. **South Korea set to develop their Arctic shipping corridors:**
    a. South Korea, following China, is accelerating to develop trade corridors to Europe via the Arctic.[14]
    b. State-backed ship finance institution Korea Ocean Business Corp (KOBC) launched an organisation to explore the Arctic as a shortcut from Busan to Rotterdam and sees the Northern Sea Route as an alternative to detours around the Cape of Good Hope. The route is set to reduce Busan-Rotterdam voyages by 10 days, as well as saving on fuel.
2. **Panama Canal to sell the rights to two ports awaiting construction:**
    a. The Panama Canal Authority will auction rights to build and operate two new ports (one on each side of the canal) to diversify operators, reduce dominance by MSC, and exclude COSCO. The project is expected to generate approximately **$500 million** in annual revenue.
    b. Consultations begin in 2026 Q1 as part of an **$8,5 billion** infrastructure plan. The move comes amid legal and geopolitical disputes over other port concessions, including BlackRock–MSC's pending deal.[15]

b. Global air cargo industry

In the high-frequency metrics from World ACD, mid-August air cargo activity saw a notable downturn, with worldwide tonnages falling **↓7%** (w/w), driven by national holidays in Japan (Obon) and parts of Europe (Assumption Day). The steepest declines originated from Europe (**↓11%**) and Asia Pacific (**↓8%**), with Japan–US flows plummeting a massive **↓55%**. Additional pressure came from an Air Canada strike and evolving US import tariff adjustments, which weighed on transpacific volumes.

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

Origin Regions last 2 to 5 weeks (WORLD ACD)	Capacity[1]			Chargeable weight[1]			Rate[1]		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		+3%	+9%		+1%	-1%		-0%	+7%
Asia Pacific		-1%	+4%		-4%	+9%		+0%	-4%
C. & S. America		-1%	+2%		+0%	+4%		-0%	-2%
Europe		-1%	+4%		-7%	0%		+2%	+4%
M. East & S. Asia		+1%	+5%		-4%	+0%		-3%	-16%
North America		-3%	-1%		-6%	+2%		+1%	-1%
Worldwide		-1%	+3%		-5%	+4%		+0%	-2%

Source: World ACD

Despite weaker demand, average global spot rates remained stable at **$2,64/kg**, only **↓3%** below last year, with transpacific rates holding near **$4,89/kg**. On a regional year-on-year basis, chargeable weight rose in Africa (**↑7%**) and Europe (**↑4%**), but fell sharply in the Middle East and South Asia (**↓16%**).

In other aviation news, **(1)** European imports are calling for EU and UK governments to follow in the US's footsteps and remove de minimis exemptions for low-value Chinese imports.[16] And, **(2)** Lufthansa and fast-

[14] Koo, A. 21/08/2025. South Korea races to develop Arctic shipping, revealing plan for industrial cluster.
[15] Paris, C. 26/08/2025. Panama Canal Plans Sale of New Ports to Bring in Competition Ahead of BlackRock Deal.
[16] Goldstone, C. 20/08/2025. End de minimis rules in Europe and 'level the playing field'.

fashion Chinese behemoth Shein could enter a long-term collaboration with the signing of a Sustainable Aviation Fuel (SAF) agreement.[17]

ENDS[18]

[17] Goldstone, C. 21/08/2025. Lufthansa and Shein eye SAF agreement, as winter cargo schedule is unveiled.

[18] **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.*