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# Cargo Movement Update #249[1]

**Date: 31 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)** | 45 294 | 51 602 | **96 896** | 45 442 | 51 771 | **97 213** | ↓0,3% |
| **Air Cargo (tons)** | 4 140 | 2 592 | **6 732** | 4 392 | 2 699 | **7 091** | ↓5% |

## Monthly Snapshot

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

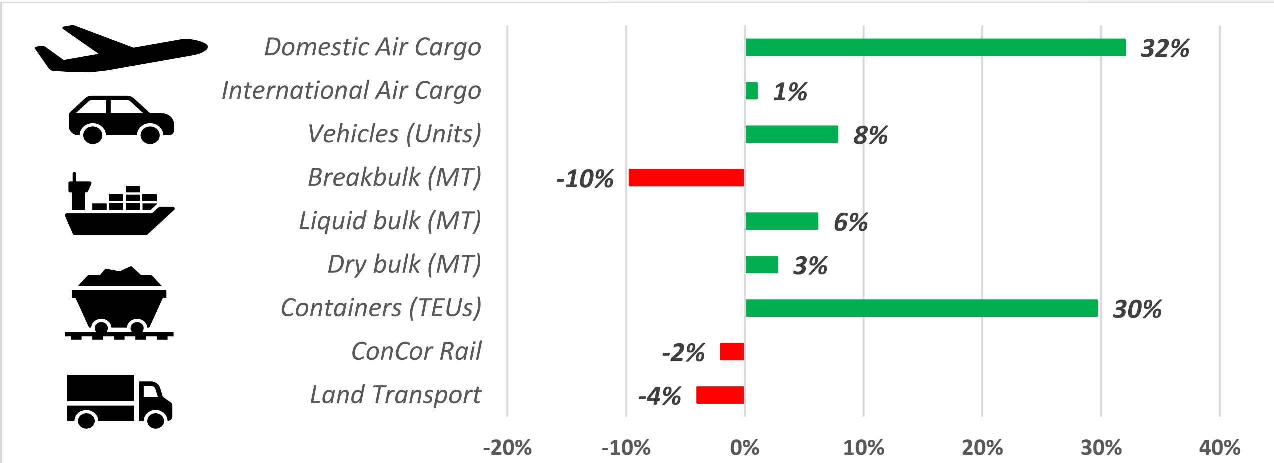
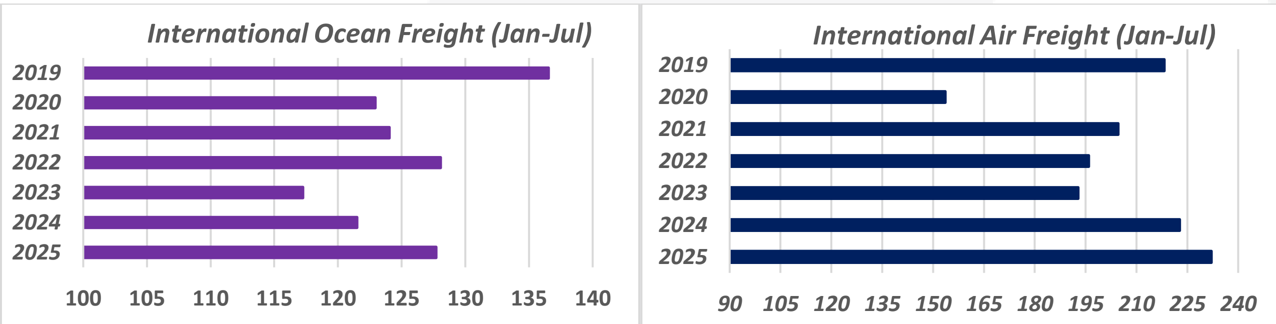



*Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)*




## Key Notes

- An average of **~13 842 TEUs** was handled per day, with **~12 026 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 324** containers, up by ↑13% from last week.
- Cross-border queue: **↑0,2 hrs**; transit: **↓0,2 hrs**; SA borders: **~11,6 hrs** (**↑8%**); SADC: **~5,5 hrs** (**↓5%**).
- US revokes *de minimis* exemption, imposing **$80–$200** flat fees per parcel, further stimulating inflation.
- Global spot rates declined by another **↓5,8%** (or **$131**) to **$2 119/40ft**. Rates are now: **↓59%** (y/y).
- Global air cargo demand rose **↑5,5%** (y/y) in July, rebounding on the back of tariff-driven frontloading.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *249th* 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 **13 842 TEUs** was handled daily, a very minimal decrease from **13 888 TEUs** the previous week.

Despite the elevated throughput – indeed more than **90 000 TEUs** for the fourth week in a row and averaging more than **92 000** across the last fourteen weeks, some operational matters still constrained fluidity. These include adverse weather, vacant berths, as well as equipment breakdowns and shortages. Vacant berths and equipment challenges ensured operational delays in Cape Town, as equipment breakdowns, high swells, and congestion proved to be the primary operational constraints in Durban. Agent delays and adverse weather impacted operations at our Eastern Cape Ports, with several operational hours being conceded at the Port of Richards Bay due to inclement weather. The latest reports from TFR suggest that operations on the line between Pretoria and Durban are still experiencing delays of between 4 and 6 hours as a result of diesel hauling due to cable theft, while operations on the line between City Deep and Mafikeng are still experiencing delays of between 12 and 24 hours due to the same reason. The latest *"Southern Africa Terminal and Service Update – Week 35"* from Maersk provides encouraging reading for most South African ports, as minimal vessels seemingly waited for service at most of our container terminals.

Global trade developments remain turbulent. In the US, new tariffs on low-value parcels have disrupted e-commerce flows, with higher consumer costs and ongoing legal challenges adding to uncertainty ahead of the mid-October deadline. The LPG shipping market remains volatile due to geopolitical risks, weather-related disruptions, and shifting trade patterns, though exports continue to grow. Container shipping faces historic fleet expansion, with the global orderbook nearing **10 million TEU**, largely alternative-fuelled. Freight rates fell further this week, as charter markets remain firm, though carriers face mounting cost pressures and margin erosion. Other developments of note include **(1)** blanked sailings expected for Chinese Golden Week, and **(2)** Israeli carrier Zim reroutes vessels after Turkey announces ban on port calls.

In the air cargo industry, final numbers for August show that air cargo increased by **↑15%** (m/m) above July and is **↑12%** (y/y) above August last year. For this week, the daily average of air cargo handled at ORTIA amounted to **~591 000 kg** inbound (**↓6%**, w/w) and **~370 000 kg** outbound (**↓4%**). Despite the slight weekly reduction in bi-directional flows, the current levels indicate that cargo is still trending at approximately **↑11%** (y/y) above the same level as last year, and about **↑13%** (y/y) above the comparative levels of pre-pandemic 2019.

Operationally, **(1)** scheduled power outages at OR Tambo International Airport from **1–5 September** form part of critical maintenance, with essential systems supported by backup generators but the potential for wider disruption if unplanned interruptions occur; and **(2)** aviation security updates from a recent ICAO-aligned workshop underscored ongoing vulnerabilities, particularly around third-party service providers, with deficiencies in access control, supervision of ground personnel, and baggage/cargo protection requiring urgent attention to mitigate risks.

Internationally, global air cargo demand rose **↑5,5%** year-on-year in July according to IATA, rebounding strongly on the back of tariff-driven frontloading, with Asia Pacific (**↑11%**) and Africa (**↑9,4%**) leading growth. Capacity increased by **↑3,9%**, mainly through expanded belly-hold lift, while easing jet fuel prices (**↓9,1%**) provided cost relief even as yields softened (**↓2%**). Africa stood out with robust demand and the highest regional pricing gain (**↑7%** y/y), underscoring its growing role in regional and global cargo markets amid persistent trade and manufacturing uncertainty.

Cargo movements along the N4 corridor increased slightly for road transport, but had to battle some early-week congestion before KM7, and decreased somewhat for rail transport. Truck volumes through the border post increased to **1 674 HGVs per day** (**↑9%**, w/w). Queue times consequently increased to an average of **4,2 hours** (**↑24%**) at the border. The average processing time also increased to an average of **4,1 hours** (**↑24%**) per crossing. The rail to Maputo decreased to an average of **five trains daily** (down by **five** from last week). Sugar trains from Eswatini also decreased to around **one train a day**.

Land border crossing times – on average – were mainly stable across the SADC region. Overall, the average queue time increased by approximately **a quarter of an hour** from last week, while transit time decreased by roughly the same magnitude. The median border crossing times at South African borders increased by **almost an hour**, averaging **~11,6 hrs** (**↑8%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased by around **20 minutes**, averaging **~5,5 hrs** (**↓5%**). Similar to last week, on average, three SADC borders took around a day to cross, namely Beitbridge, Kasumbalesa (the worst affected, taking around **two days** from the **Zambian side**), and Zobue/Mwanza OSBP. Other developments of note include **(1)** a Botswana/South Africa network failure, **(2)** a Beitbridge mixed load scanning dispute, and **(3)** a proposed SANRAL tollgate at Beitbridge.

In summarising this edition, we've had another good week concerning throughput (and further confirmed by a trade surplus continuation), as several vital steps continue to drive logistics reform. As highlighted last week, the entry of 11 new Train Operating Companies (TOC) into the Transnet rail network marks another crucial step in reshaping our logistics system. However, the reform cannot stop here, as we have reiterated *ad nauseam* of late. South Africa must continue to restructure away from a public monopoly towards a modern, open-access concessioning model, underpinned by transparent tariffs (with the NPA continuing its roadshow this week) and equitable participation. Crucially, this transformation must be guided by trust, transparency, and accountability, ensuring that it occurs solely in the interest of *South Africa Inc.*, not for narrow exploitation or personal gain. The risks are well-documented, as recently underscored in the media (both locally[6] and internationally[7]), and must be managed carefully if reform is to translate into lasting competitiveness and resilience.

[6] Business Day Editorial. 26/08/2025. New rail firms on old lines means new versions of old woes.
[7] Goldstone, C. 29/08/2025. South Africa eyes new operators for a rail network in dire need of refurbishment.

# 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 25 to 31 August (measured in TEUs)*

| **7-day flow reported (25/08/2025 – 31/08/2025)** | | | |
|---|---|---|---|
| **Terminal** | **Daily average** | **Weekly total** | **% (w/w)** |
| **Durban Container Terminal (Pier 2)** | 5 352 | 37 462 | **↑6%** |
| **New Pier (Pier 1)** | 2 375 | 16 624 | **↑4%** |
| **Cape Town Container Terminal** | 2 023 | 14 163 | **↓21%** |
| **Ngqura Container Terminal** | 2 840 | 19 879 | **↑20%** |
| **Port Elizabeth Container Terminal** | 495 | 3 467 | **↑81%** |
| **Other** | 757 | 5 301 | **↓44%** |
| **Total** | **13 842** | **96 896** | **↓0,3%** |

*Source: Calculated from TPT, 2025. Updated 31/08/2025.*

A slightly decreased average of **~13 842 TEUs** (**↓0,3%**) was handled per day for the last week (*25 to 31 August, Table 2*). Despite the reduction, throughput was still above the projected average of **~13 842 TEUs** (**↑10%** actual versus projected).

For the coming week, a decreased average of **~12 026 TEUs** (**↓13%**) is predicted to be handled (*25 to 31 August*, *Table 3*). Worth noting that the industry has exceeded these targets (as set by TPT earlier this year) of late, which reiterates the good performance of the container sector.

Despite the elevated throughput, some operational matters still constrained fluidity, including adverse weather, vacant berths, as well as equipment breakdowns and shortages.

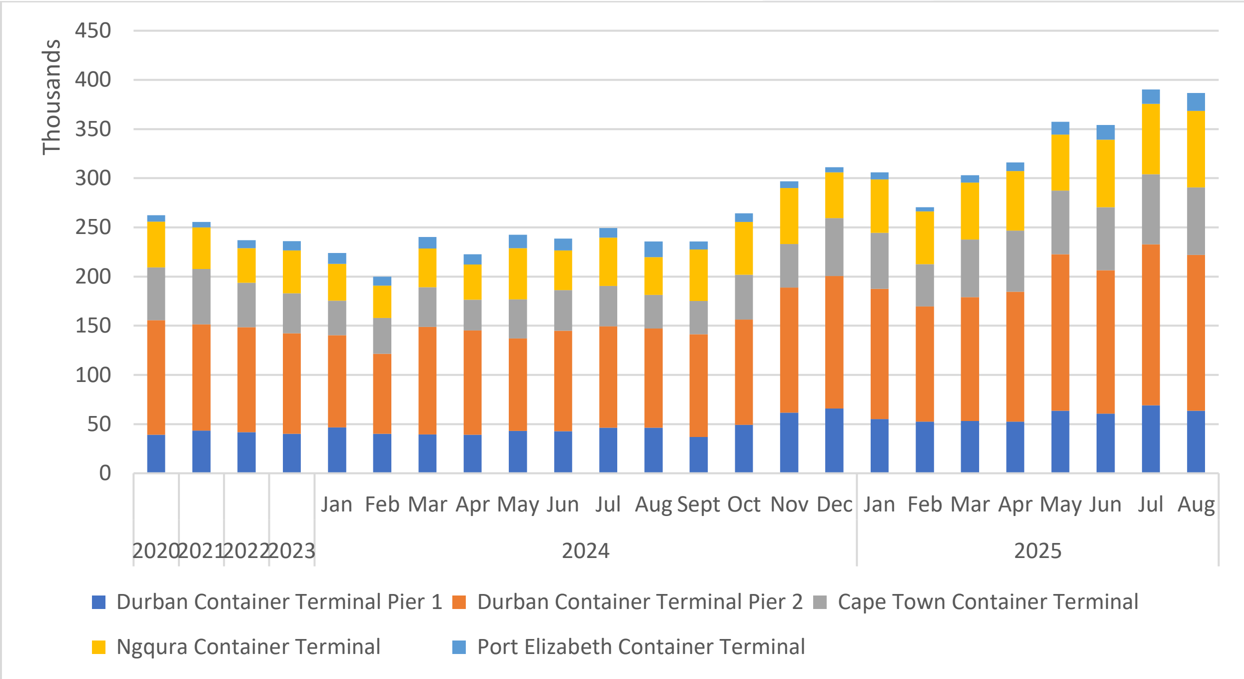
*Table 3 – Container Ports – Weekly flow projected for 1 to 7 September (measured in TEUs)*

| **7-day flow projected (01/09/2025 – 07/09/2025)** | | | |
|---|---|---|---|
| **Terminal** | **Daily average** | **Weekly total** | **% (w/w)** |
| **Durban Container Terminal (Pier 2)** | 4 998 | 34 985 | **↓7%** |
| **New Pier (Pier 1)** | 1 916 | 13 409 | **↓19%** |
| **Cape Town Container Terminal** | 2 193 | 15 353 | **↑8%** |
| **Ngqura Container Terminal** | 1 655 | 11 582 | **↓42%** |
| **Port Elizabeth Container Terminal** | 391 | 2 736 | **↓21%** |
| **Other** | 873 | 6 114 | **↑15%** |
| **Total** | **12 026** | **84 179** | **↓13%** |

*Source: Calculated from TPT, 2025. Updated 31/08/2025.*

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

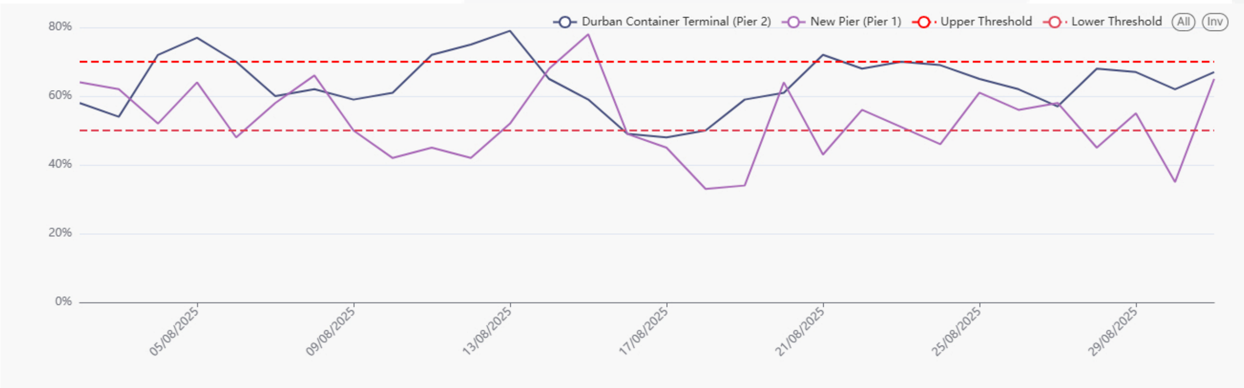
*Figure 3 – Monthly flow reported for total container movement (thousands, 2020 to present, m/m)*




*Source: Calculated from TPT, 2025, and updated 31/08/2025.*

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

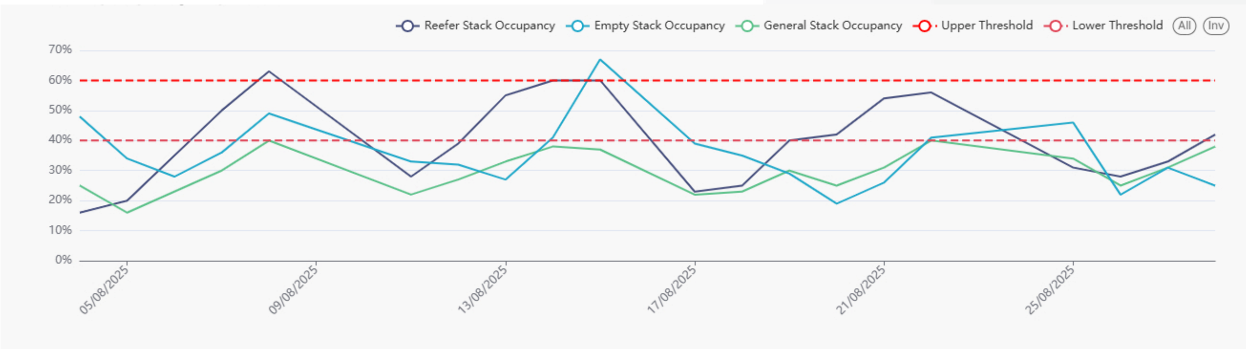
*Figure 4 – Stack occupancy in DCT, general-purpose containers (28 July to present; day on the day)*




*Source: Calculated using data from Transnet, 2025, and updated 31/08/2025.*

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 31/08/2025.*

## b. Summary of port operations

### i. Weather and other delays

- Vacant berths and equipment challenges ensured operational delays in Cape Town.
- Equipment breakdowns, high swells, and congestion proved to be the primary operational constraints in Durban.
- Agent delays and adverse weather impacted operations at our Eastern Cape Ports.
- Several operational hours were conceded at the Port of Richards Bay due to inclement weather.

### ii. Cape Town

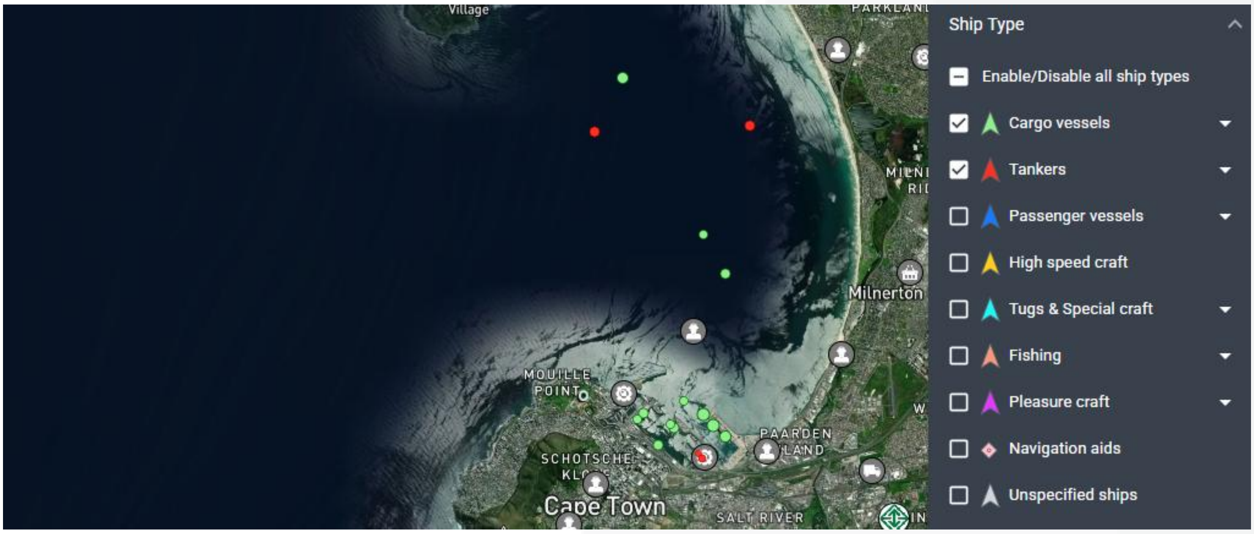
On Thursday, CTCT recorded one vessel at berth and none at anchor, as vacant berths proved to be the primary operational constraints at the port. On the landside, between Monday and Thursday, the terminal managed to service at least 4 773 trucks while handling approximately 378 rail units. On the waterside, the terminal executed approximately 5 932 container moves across the quay during the same period. Additionally, this week the terminal operated with **eight STS cranes**, between **22-23 RTGs**, and around **58-59 hauliers**. Crane LC1 was the most notable crane absentee before the weekend, with no ETR communicated yet. The technical team at the terminal took advantage of the sole berthed vessel by conducting maintenance on Cranes LC1-LC5 during this period.

The Port of Cape Town has begun integrating its new equipment complement, with the first seven of 28 new RTGs entering light operations. Full deployment is expected by the end of the week, following operator training and software upgrades. Another nine are currently being assembled in the terminal. The remaining 10 RTGs are scheduled to arrive by early September, positioning the terminal to achieve some productivity gains from September onwards and to be fully implemented by December.

This week, CTMPT had minimal operations at the terminal as no vessel was on berth or at anchor for the most significant part of the week. As a result, minimal volumes were handled on the waterside and landside, leading to stack occupancy figures of 0% for general containers, reefers, and empties. Additionally, for the most significant part of the week, the terminal had three cranes and four straddle carriers available.

Between 18 and 24 August, the FPT terminal handled seven vessels: two multi-cargo, two breakbulk, two container, and one dry bulk vessel. Berth occupancy during this period was recorded at 41%. The terminal planned to handle eight more vessels between 25 and 31 August, with another seven vessels scheduled between 1 and 7 September. 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 31/08/2025 at 14:00.*

### iii. Durban

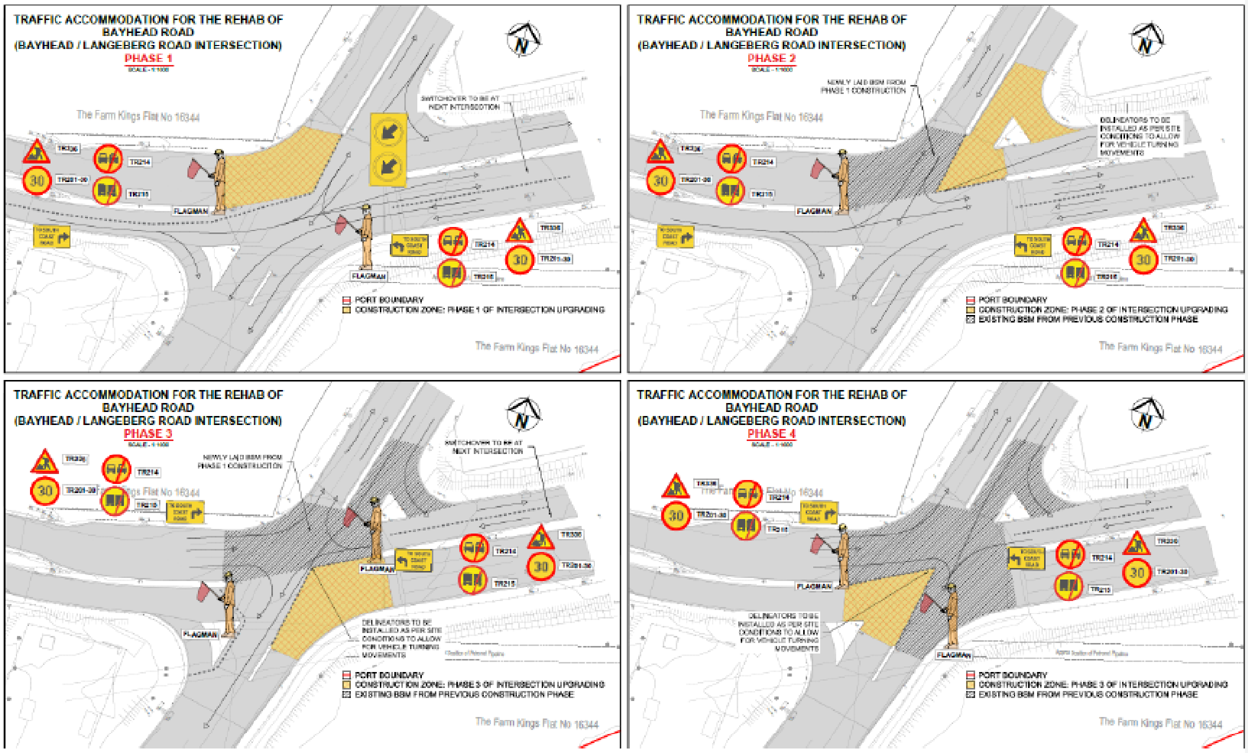
On Thursday, Pier 1 recorded two vessels on berth, with zero vessels at anchor. Between Monday and Thursday, the terminal executed at least 6 070 gate moves and 267 rail moves on the landside. The **average TTT** for the week was **~56 minutes** (**↑2%**, w/w) and an average **staging time** of **~31 minutes** (**↑7%**). Additionally, the terminal moved over 7 200 TEUs across the quay on the waterside during the same period. The terminal had between **four and five STS cranes** and **15-16 RTGs** available for the most significant part of the week.

Pier 2 had four vessels on berth and none at anchorage on Thursday, as equipment breakdowns and congestion prevented optimal operational performance this week. The terminal operated with **11-13 gangs** and moved over **11 100** containers across the quay between Monday and Thursday on the waterside. Approximately **12 424** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~78 minutes** (**↑13%**, w/w) and an average **staging time** of **~80 minutes** (**↑11%**). Approximately 2 140 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **60** and **63** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **57%** during this period.

Durban's MPT terminal recorded one vessel at berth on Thursday and two at outer anchorage. Stack occupancy for containers was recorded at 25% and the reefer stack at 7%, with the breakbulk stack at 60%. In the preceding 24 hours, 512 containers were handled on the waterside. On the landside, 538 container trucks were serviced at a TTT of ~76 minutes. Additionally, 72 breakbulk trucks, containing 2 038 tons, were serviced. During this period, two cranes, nine reach stackers, six forklifts, and 29 ERFs were in operation. This week, the third crane (Crane 04) went out of commission and is expected to return to service around 9 September. Additionally, reports from TPT maintain that the fourth crane is only scheduled to return to service around 21 December.

This week, sectional closures are taking place at the Bayhead/Langeberg Road intersection (3–4 September) for milling and resurfacing works, with heavy congestion expected and diversions in place to accommodate traffic.

*Figure 7 – Bayhead/Langeberg Intersection Traffic Accommodation*




*Source: Transnet*

Between Wednesday and Thursday, the Maydon Wharf MPT recorded one vessel at berth and zero at anchorage. On the waterside, 625 tons were handled, while two trucks, containing 53 tons, and 21 wagons containing 1 097 tons were handled on the landside. During the same period, the agri-bulk facility had zero vessels at berth and zero vessels at anchor, with the next vessel expected to arrive around 4 September.

On Thursday, the Ro-Ro terminal in Durban recorded three vessels on the berth, with two at anchorage. In the preceding 24 hours, the terminal handled 2 312 road units and 410 units on rail on the landside, while 3 803 units were handled on the waterside. Overall stack occupancy was 99%. During this period, the terminal had 156 high-and-heavy units (abnormal loads) on hand and managed to handle 93.

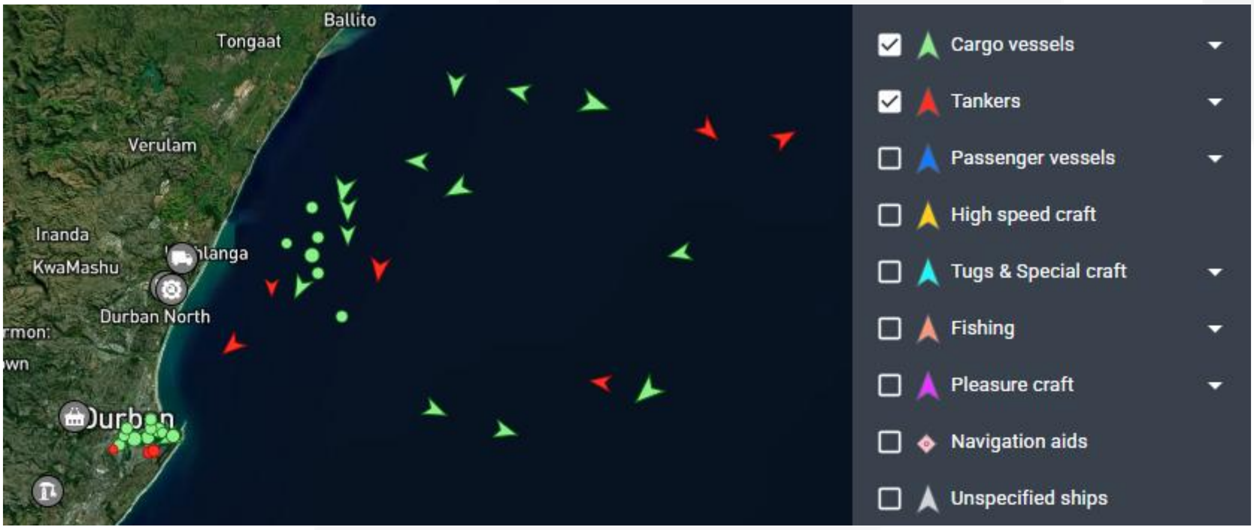
The following figure summarises the performance of Durban's container terminals for the last two weeks, focusing on gate moves and time spent in the terminals.

*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 31/08/2025.*

The queue of container vessels waiting outside Durban has increased slightly since last week. On Monday evening (1 September), **one** container vessel was waiting outside the anchorage at Pier 1, **one** for Pier 2, and **one** for Point. The queue of dry (**three**), liquid (**six**), and breakbulk (**two**) vessels has remained relatively stable since last week. The following snapshot shows the current status quo:

*Figure 9 – Durban vessel view (per vessel group)*




*Source: Marine Traffic. Updated 31/08/2025 at 14:00.*

### iv. Richards Bay

On Thursday, the Port of Richards Bay had ten vessels at anchor and 15 on the berth, translating to five vessels at DBT, five at MPT, four at RBCT, and one 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 remained out of commission for the entire week and is only anticipated to return to operations around 5 September. Operations were impacted by adverse weather during the earlier stages of the week.

The daily average coal throughput for the week was stable (and remained high) and averaged around **157 000 tons** (**↓1%**, w/w) a day. An average of **24 trains** was serviced on the landside (up by **one** 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 most significant part of the week, the Ports of PE and Coega shared a pilot boat due to some waterside equipment challenges. Stack occupancy figures were recorded at 23% for reefers, 81% for reefer ground slots, and 56% for the general stack. Despite experiencing agent delays, the terminal handled approximately 2 290 TEUs and 122 reefers on the waterside. Approximately 625 trucks were processed on the landside at a TTT of ~36 minutes. Additionally, the terminal serviced two trains at a RTT of ~3 hours. For the most significant part of the week, the terminal had 6-7 STS cranes, between 22-25 RTGs, and between 40-62 hauliers in service.

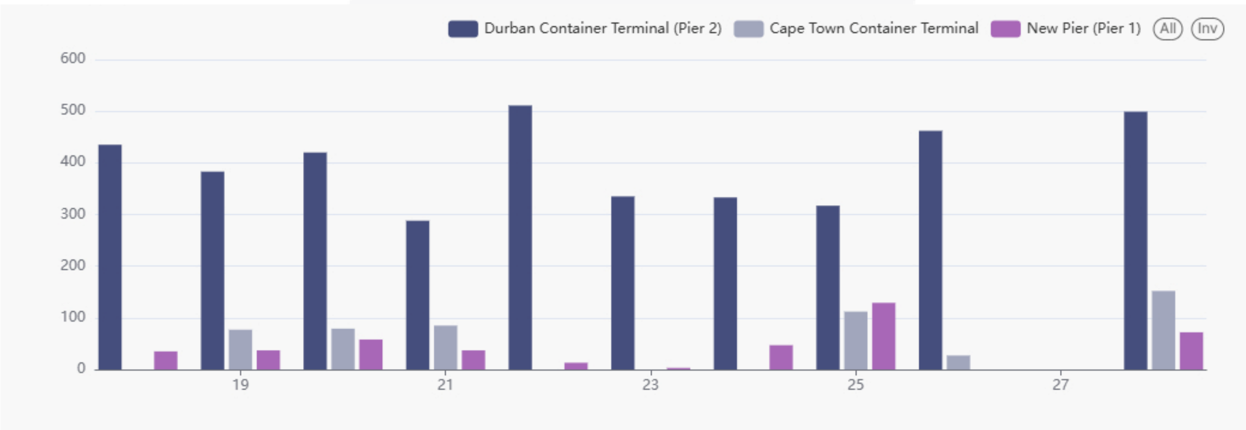
On Thursday, GCT had one vessel at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 260 trucks were processed at a TTT of ~21 minutes on the landside, while 841 TEUs and 224 reefers were handled across the quay on the waterside. Stack occupancy was recorded at 25% for the general stack, 34% for reefers, and 22% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and six straddles in service.

On Wednesday, the Ro-Ro terminal had zero vessels on berth and zero at outer anchorage. During the preceding 24 hours, the terminal handled around 1 533 units on the waterside, resulting in a stack occupancy of 40%.

### vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that operations on the line between Pretoria and Durban are still experiencing delays of between 4 and 6 hours as a result of diesel hauling due to cable theft, while operations on the line between City Deep and Mafikeng are still experiencing delays of between 12 and 24 hours due to the same reason. Towards the end of the week, DCT Pier 2 had 312 ConCor units on hand with a dwell time of 48 hours and 285 over-border units with a dwell time of 66 days.

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




*Source: Calculated using data from Transnet, 2024. Updated 31/08/2025.*

In the last week (*25 to 31 August*), rail cargo on the ConCor line out of Durban was reported at **3 324** containers, up by a significant ↑13% from the previous week's **2 954** containers.

### vii. General Update

The latest *"Southern Africa Terminal and Service Update – Week 35"* from Maersk provides encouraging reading for most South African ports. No waiting times were recorded for terminals such as CTMPT, NCT, PECT, DCT Pier 1, and Pier 2. However, CTCT recorded 0-3 days' waiting time, with some adverse weather conditions expected early next week. In comparison, the situation appears somewhat more dire for our immediate neighbours, with Port Louis (Mauritius) and Beira (Mozambique) recording waiting times of around seven days. Port Reunion recorded waiting times of between 0 and 5 days, while Maputo (Mozambique) recorded waiting times of up to two days. Walvis Bay in Namibia recorded a waiting time of one day, as Toamasina in Madagascar had no waiting times.

## 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 (*25 to 31 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** | **591 435** | **4 140 042** | **↓6%** |
| **Volume outbound** | **370 247** | **2 591 731** | **↓4%** |
| **Total** | **961 682** | **6 731 773** | **↓5%** |

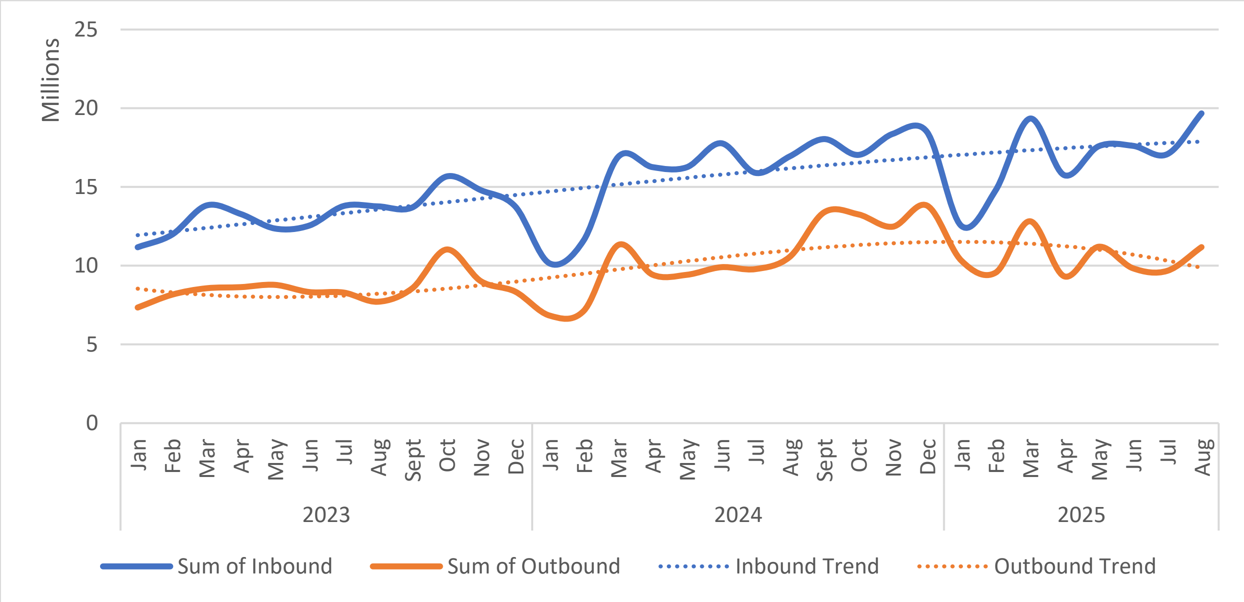
*Courtesy of ACOC. Updated: 31/08/2025.*

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~591 000 kg** inbound (**↓6%**, w/w) and **~370 000 kg** outbound (**↓4%**). Despite the slight weekly reduction in bi-directional flows, the current levels indicate that cargo is still trending at approximately **↑11%** (y/y) above the same level as last year, and about **↑13%** (y/y) above the comparative levels of pre-pandemic 2019. Final numbers for August show the air cargo increased by **↑15%** (m/m) above July and is **↑12%** (y/y) above August last year.

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

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

*Figure 11 – International cargo for OR Tambo – volumes per month (kg millions)*




*Calculated from ACOC. Updated: 31/08/2025.*

## b. Air cargo operations

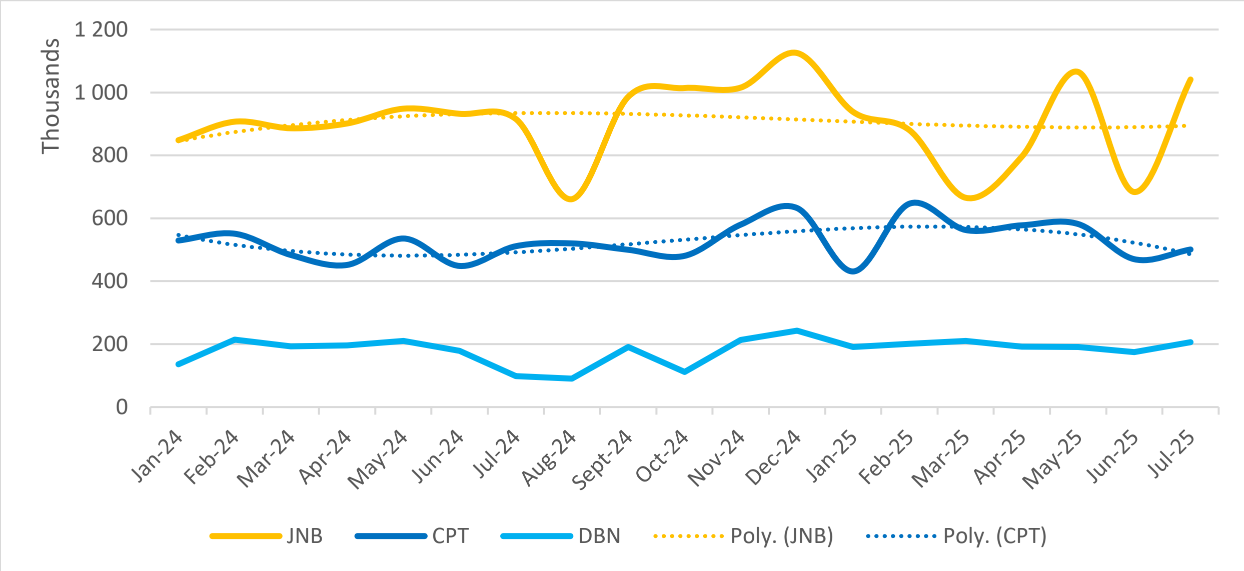
The following air cargo operations are worth noting this week, with much of the discourse adding to the recent narrative in the industry:

1. **Power Outage (OR Tambo International Airport):**
   a. Scheduled power outages are taking place from **1–5 September 2025** across various substations as part of critical maintenance.
   b. Although each blackout is expected to last no longer than four hours, backup generators will support essential operations.
   c. Stakeholders have been advised to prepare for possible disruptions, especially given that in some cases an unplanned outage could affect the entire airport.
2. **Aviation Security (AVSEC):**
   a. A recent **ICAO-aligned workshop** highlighted ongoing compliance issues with third-party service providers.
   b. Key deficiencies include inadequate access control to aircraft, lapses in supervision of ground personnel and vehicles, and improper handling of baggage and cargo on ramps.
   c. ICAO findings emphasise the need for stricter enforcement of security checks, searches, and baggage/cargo protection to mitigate risks of unlawful interference.

### c. Domestic air cargo

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

*Figure 12 – Domestic inbound and outbound cargo (thousands)*




*Courtesy of ACOC. Updated: 31/08/2025.*

## 3. SARS Merchandise Trade Update: July

SARS released its latest "*Merchandise Trade Statistics*" for July[9], revealing a preliminary monthly trade surplus of **R20,3 billion**. Monthly trade data indicate that exports increased by **↑8,5%** from June (m/m) to **R184,3 billion**, while imports decreased by **↑10,2%** (m/m) to **R164 billion**. Despite another strong month for exports, the year-to-date trade surplus of **R98,9 billion** was lower than the **R113,7 billion** for the comparable period in 2024. On an annual basis, export flows for July 2025 were **↑3,1%** (y/y) higher than in July 2024, while import flows were higher by **↑4,5%**.

Regionally, trade with BELN countries for July resulted in a trade surplus of **R11,4 billion**, derived from exports of **R17,7 billion** and imports of **R6,3 billion**. Exports to our neighbouring countries increased by **↑7,6%** (m/m) between June and July 2025, while imports dropped by **↓0,7%** (m/m) over the same period. Cumulative figures for the year demonstrate a comparable trade balance with 2024, increasing slightly from **R76,2 billion** in 2024 to **R76,5 billion** in 2025. Excluding BELN countries, South Africa's trade balance with all other trading partners for the month recorded a net surplus of **R8,9 billion**.

## 4. Road and Regional Update

### a. Lebombo border post update

In the last week (*25 to 31 August)*, cargo movements along the N4 corridor increased slightly for road transport, but had to battle some early-week congestion before KM7, and decreased somewhat for rail transport. The following notes summarise the recent developments:

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[9] SARS. 31/08/2025. Trade Statistics: July 2025.

- For this week, truck volumes through the border post increased to **1 674 HGVs per day** (**↑9%**, w/w).
- Queue times consequently increased to an average of **4,2 hours** (**↑24%**) at the border.
- The average processing time also increased to an average of **4,1 hours** (**↑24%**) per crossing.
- The rail to Maputo decreased to an average of **five trains daily** (down by **five** from last week).
- Sugar trains from Eswatini also decreased to around **one train a day**.

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 | **1674** | **1628** | **1293** | **234** | **31** | **92** | **33** | **247** | **5** | **10** | **1** | **1** |
| % (w/w) | **9%** | **8%** | **13%** | **2%** | **0%** | **0%** | **-46%** | **-16%** | **-140%** | **0%** | **-100%** | **-200%** |
| % 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 31/08/2025.*

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 31/08/2025 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 **a quarter of an hour** compared to last week, while transit time decreased by roughly the same magnitude.
- The median border crossing times at South African borders increased by **almost an hour**, averaging **~11,6 hrs** (**↑8%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased by around **20 minutes**, averaging **~5,5 hrs** (**↓5%**).

1. **Botswana/South Africa network failure:**
    a. On **Sunday**, there was a **network failure** at the Botswana/South Africa border posts.
    b. Transporters were asked to **delay dispatching trucks** until the issue was resolved.
    c. The problem was fixed within a few hours, allowing operations to resume.
2. **Beitbridge mixed load scanning dispute**
    a. Transporters questioned why **"mixed load" vehicles** must undergo **scanning** even after being redirected to **Condep (Zimbabwe side)** for a full search.
    b. Authorities cite **"Risk Control"** as justification.
    c. **FESARTA** criticised the process, stating that **scan results should be analysed first**, before sending trucks to Condep, otherwise this creates **avoidable bottlenecks**.
3. **Proposed SANRAL tollgate at Beitbridge:**
    a. Authorities announced the **location** of a **new tollgate** at Beitbridge:
        i. It will be situated at the **North gate (by the river)**, just past the BMA gatehouse.
        ii. It will apply **only to southbound vehicles** entering South Africa.
        iii. **Zimbabwe will continue charging northbound vehicles**.
    b. Revenue will fund **border infrastructure upgrades**, including a **third bridge for freight in both directions**.
    c. **Transporters have expressed frustration**, seeing this as an additional burden rather than a solution.

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

*Table 6 – Delays[10] summary – South African borders (both directions)*

| Border Post | Direction | HGV[11] 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 | 497 | 23,9 | 6,5 | 23,5 | 14 910 | 3 479 |
| Beitbridge | Zimbabwe-SA | 471 | 11,9 | 3,0 | 3,0 | 14 130 | 3 297 |
| Groblersbrug | SA-Botswana | 241 | 17,4 | 1,2 | 17,2 | 7 230 | 1 687 |
| Martin's Drift | Botswana-SA | 249 | 3,1 | 0,4 | 3,0 | 7 470 | 1 743 |
| Kopfontein | SA-Botswana | 235 | 16,5 | 1,5 | 16,3 | 7 050 | 1 645 |
| Tlokweng | Botswana-SA | 23 | 0,6 | 0,2 | 0,3 | 690 | 161 |
| Vioolsdrift | SA-Namibia | 30 | 4,2 | 1,2 | 4,1 | 900 | 210 |
| Noordoewer | Namibia-SA | 20 | 1,7 | 0,3 | 1,4 | 600 | 140 |
| Nakop | SA-Namibia | 30 | 5,2 | 1,0 | 5,1 | 900 | 210 |
| Ariamsvlei | Namibia-SA | 20 | 1,1 | 0,4 | 1,1 | 600 | 140 |
| Skilpadshek | SA-Botswana | 289 | 10,8 | 2,1 | 10,5 | 8 670 | 2 023 |
| Pioneer Gate | Botswana-SA | 61 | 0,0 | 0,0 | 0,0 | 1 830 | 427 |
| Lebombo | SA-Mozambique | 1 524 | 4,2 | 1,3 | 4,1 | 45 720 | 10 668 |
| Ressano Garcia | Mozambique-SA | 1 470 | 2,7 | 0,2 | 2,4 | 44 100 | 10 290 |

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

| Border Post | Direction | HGV[11] Arrivals per day | Queue Time (hours) | Border Time – Best 5% (hours) | Border Time – Median (hours) | Est. HGV Tonnage per day | Weekly HGV Arrivals |
|---|---|---|---|---|---|---|---|
| **Sum/Average** | | **5 160** | **7,4** | **1,4** | **6,6** | **154 800** | **36 120** |

*Source: TLC, FESARTA, & Crickmay, week ending 24/08/2025.*

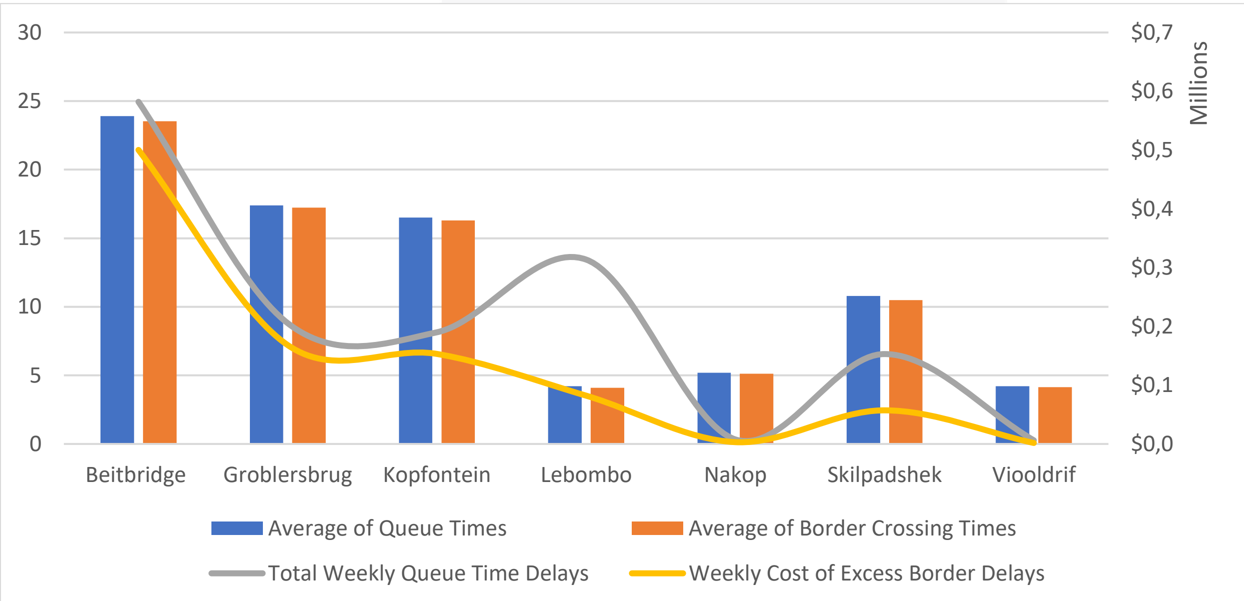
*Table 7 – Delays summary – Corridor perspective*

| 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 | 18,8 | 4,1 | 18,7 | 9 600 | 2 240 |
| **Central Corridor** | 798 | 0,6 | 0,1 | 0,6 | 23 940 | 5 586 |
| **Dar Es Salaam Corridor** | 1 819 | 12,0 | 0,8 | 11,9 | 54 570 | 12 733 |
| **Maputo Corridor** | 2 994 | 3,5 | 0,8 | 3,3 | 89 820 | 20 958 |
| **Nacala Corridor** | 127 | 0,0 | 0,0 | 0,0 | 3 810 | 889 |
| **North/South Corridor** | 3 673 | 14,0 | 1,7 | 12,3 | 110 190 | 25 711 |
| **Northern Corridor** | 2 817 | 2,1 | 0,3 | 2,0 | 92 520 | 21 588 |
| **Trans Caprivi Corridor** | 380 | 3,6 | 0,7 | 3,5 | 11 400 | 2 660 |
| **Trans Cunene Corridor** | 100 | 3,1 | 0,8 | 2,9 | 3 000 | 700 |
| **Trans Kalahari Corridor** | 116 | 11,5 | 2,2 | 11,3 | 3 480 | 812 |
| **Trans Oranje Corridor** | 100 | 0,0 | 0,0 | 0,0 | 3 000 | 700 |
| **Sum/Average** | **13 244** | **6,7** | **0,9** | **6,2** | **405 330** | **94 577** |

*Source: TLC, FESARTA, & Crickmay, week ending 24/08/2025.*

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

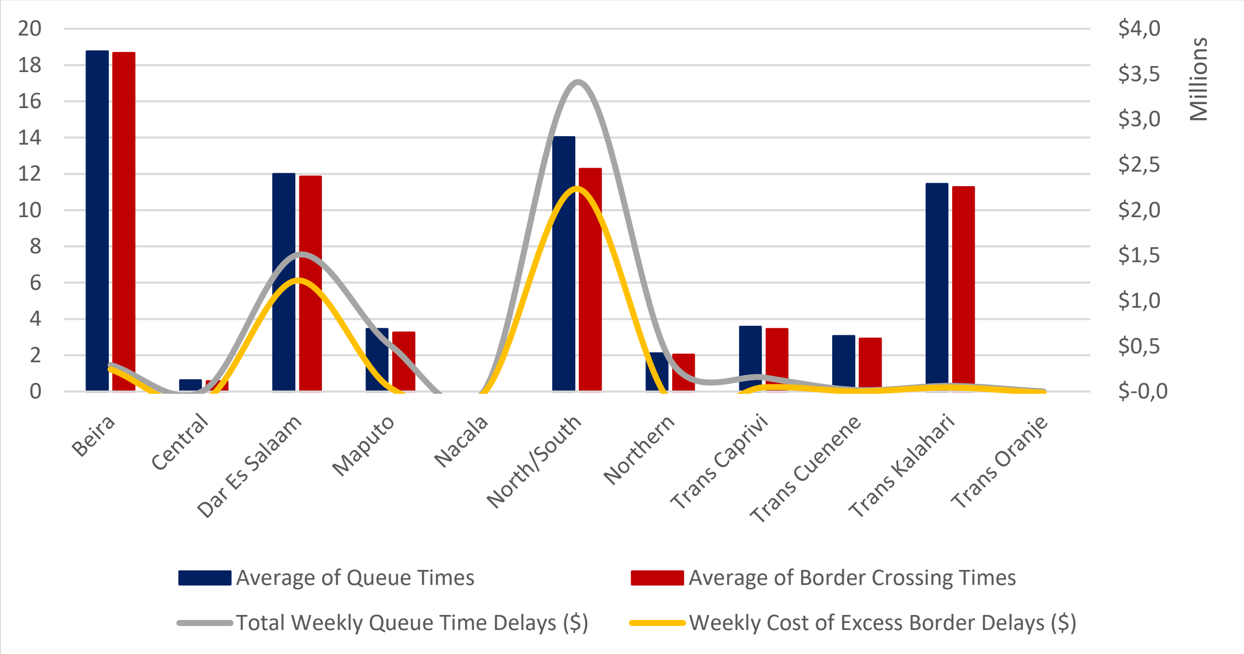
*Figure 14 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)*




*Source: TLC, FESARTA, & Crickmay, week ending 24/08/2025.*

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 24/08/2025.*

In summary, cross-border queue time averaged **~6,7 hours** (up by **~0,2 hours** from the previous week's **~6,4 hours**), indirectly costing the transport industry an estimated **$6,3 million** (**R111 million**). Furthermore, the week's average cross-border transit times also hovered around **~6,2 hours** (down by **~0,2 hours** from the **~6,3 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,6 million** (**R63 million**). As a result, the total indirect cost for the week amounts to an estimated **~$9,9 million** (**R174 million**, unchanged from the **~R145 million** in the previous report).

## 5. International Update

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

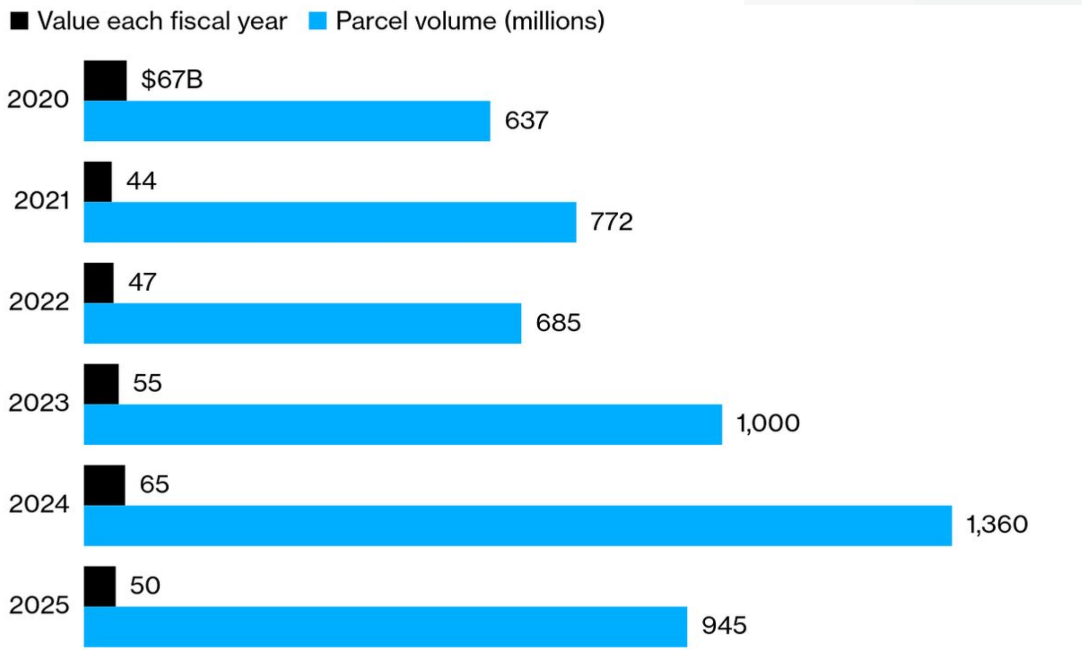
### a. International trade developments

#### i. US parcel and e-commerce economy

The United States is experiencing direct economic repercussions from the Trump administration's ongoing trade war. Inflationary pressures are mounting, and consumers are beginning to feel the effects through higher prices on imported goods. A central driver has been the administration's attempt to revoke the *de minimis* exception (similar to other countries, as reported across the last two weeks), which previously allowed low-value parcels to enter duty-free.

Under the new regime, parcels entering the US will face tariffs aligned with country-of-origin rates, or a temporary flat fee of **$80–$200 per item** (valid for six months). This abrupt shift has disrupted global logistics chains, leaving sellers, postal operators, and freight forwarders scrambling to adapt with limited guidance from US authorities.

*Figure 16 – US Low-value parcel imports*




*Source: Bloomberg*

The international response has been significant: several postal services worldwide have suspended shipments to the US pending clarity. This has placed smaller exporters, who rely on low-cost parcel services, in a precarious position, forcing them either to halt US orders or switch to higher-cost express carriers such as UPS and FedEx. The outcome remains uncertain, but the immediate effect is apparent: US consumers will face higher costs on a wide range of imported goods.

This week, interestingly, the US Court of Appeals for the Federal Circuit ruled in a 7-4 decision that Trump exceeded his authority by imposing broad tariffs using the International Emergency Economic Powers Act (IEEPA), which the court determined does not empower the president to impose tariffs. The ruling affirmed an earlier decision by the US Court of International Trade that had also found these tariffs unlawful.[12]

However, the court has allowed the tariffs to remain in place until 14 October, giving the Trump administration time to appeal to the US Supreme Court. This decision could lead to further legal battles. Trump criticised the ruling as destructive to the country and expressed confidence that the Supreme Court would overturn it. The next six weeks are set to be highly uncertain for trade.[13]

## b. Global shipping industry

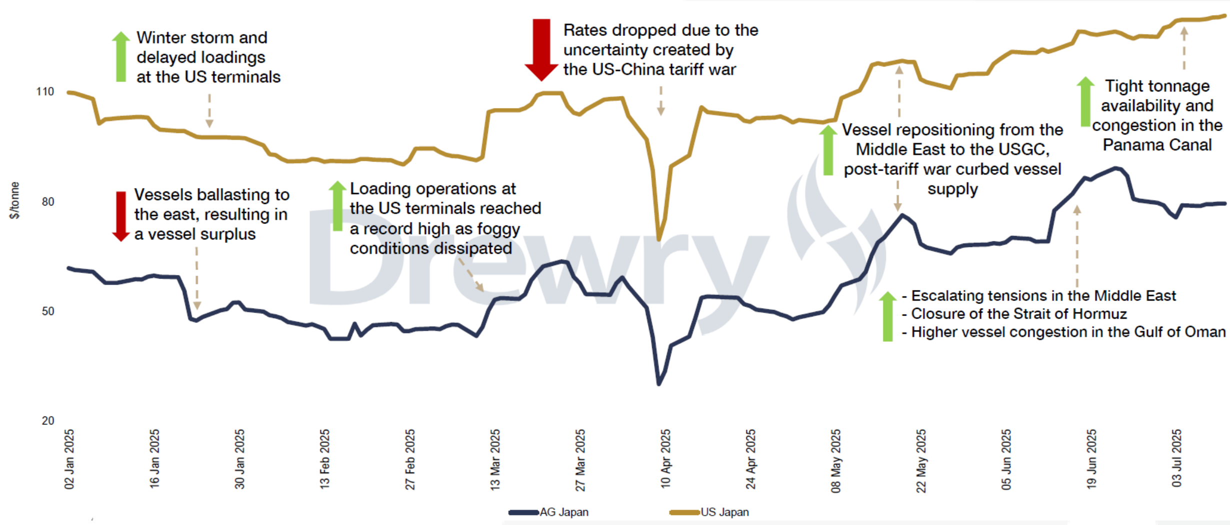
### i. LPG market update

The latest "*Drewry LPG Shipping Webinar*" confirmed the ongoing volatility in the LPG shipping market, with frequent vessel repositioning and geopolitical tensions driving sharp swings in freight rates. US terminal disruptions (primarily created by winter storms and fog delays) and record loadings have added to instability, while the US-China tariff war reshaped trade flows. Other chokepoints, such as the Middle East tensions

[12] Vinti, C. 01/09/2025. Trump's liberation day tariffs lose their freedom as they are deemed illegal by the US Court of Appeals.
[13] Lennane, A. 01/09/2025. Six weeks of global trade unease amid legal battle over Trump tariffs.

(including Strait of Hormuz risks) and Panama Canal congestion, have further tightened the effective supply of vessels. Vessels ballasting eastward created temporary surpluses, pressuring spot rates. As illustrated, the market has been characterised by short-lived spikes followed by steep corrections, reflecting both supply imbalances and shifting trade patterns.

*Figure 17 – LPG freight rates for key routes: AG–Japan and US–Japan ($/tonne)*




Source: [Drewry]

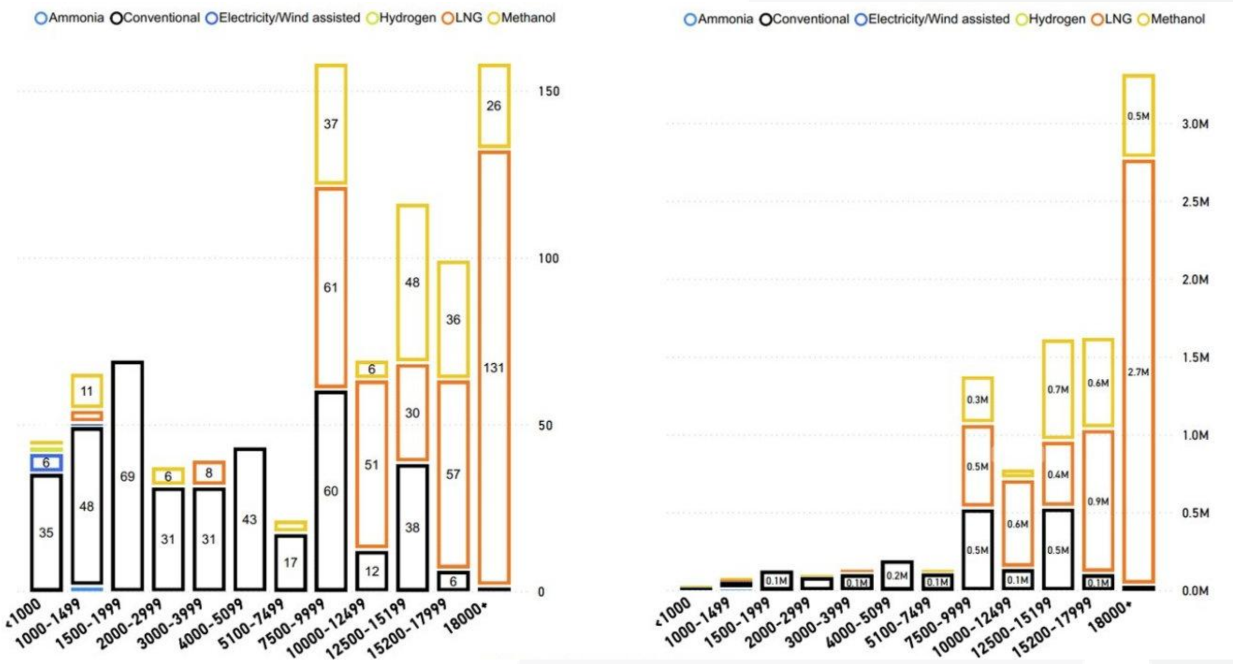
Other developments include:

1. **VLGC spot rates** swung sharply in 1H25, with temporary spikes above **$110/tonne**, followed by corrections back below **$50/tonne** amid vessel surpluses.
2. **US exports** rose **↑6% year-on-year in 1H25**, supported by terminal expansions, while **Middle East exports surged ↑11%**, driving global supply growth despite disruptions.
3. **Global LPG trade growth** for 2025 has been revised upward to **↑1,9%**, from an earlier forecast of **↑1,4%**, though demand growth remains uneven across regions (e.g., India down, Japan and Indonesia up).

### ii. Container orderbook by vessel type

Alphaliner reports that the global container-ship orderbook now stands at approximately **9,95 million TEU**, on the verge of the symbolic **10 million TEU threshold**. This marks a new historic high, far exceeding the prior peaks of **7,12 million TEU** in **2008** and **7,19 million TEU** in **2022**. A majority of these upcoming vessels are alternative-fuelled, seemingly accelerating the sector's commitment to decarbonisation and fleet modernisation, especially evident in the larger vessel sizes.

*Figure 18 – Containership orderbook by size and propulsion (LH: units, RH: TEU millions)*




*Source: [Alphaliner](Alphaliner)*

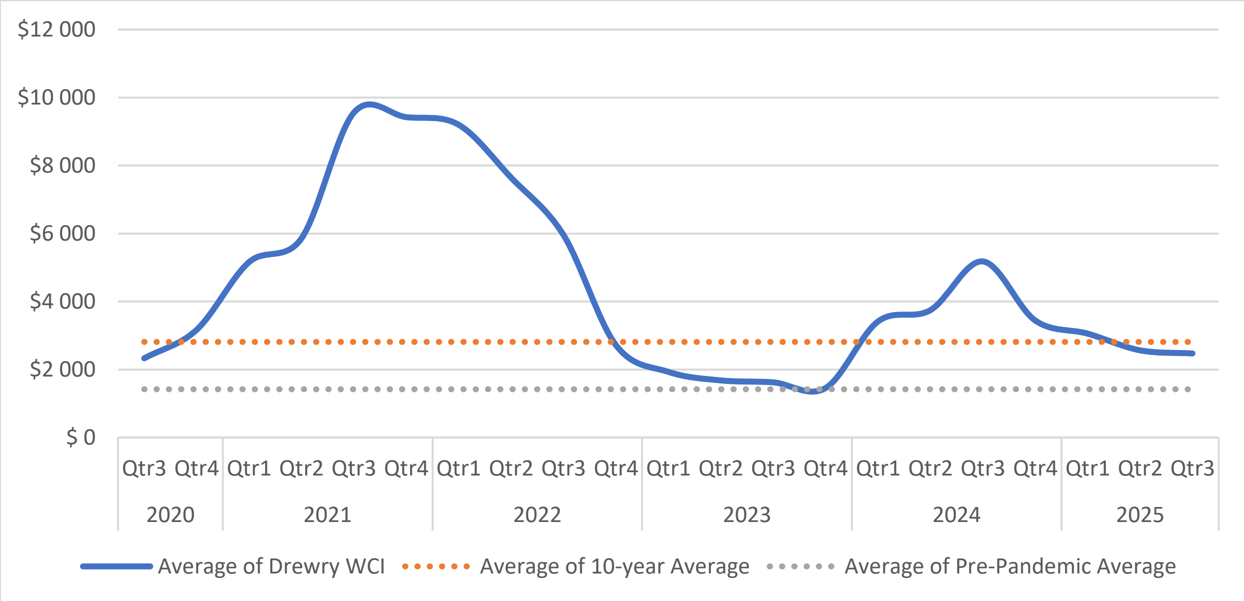
### iii. Global freight rates

Drewry's "*World Container Index*" declined by another **↓5,8%** (or **$131**) to **$2 119 per 40-ft container** this week.[14] Overall, rates are down by **↓59%** (y/y). Drewry expects rates to continue falling in the coming weeks. The unpredictability began after US tariffs were announced in April, which caused rates to surge from May through early June. However, they plunged thereafter until mid-July and continued to decline until this week.

The following figure illustrates the longer-term average since the middle of 2020, when market volatility intensified due to the pandemic. Rates have subsequently cooled significantly and have dipped below the 10-year average in recent months.

[14] Drewry. 29/08/2025. World Container Index.

*Figure 19 – World Container Freight Index ($ per 40ft)*




*Source: Calculated from Drewry*

Meanwhile, the *Harper Petersen Index* (Harpex) continues to emphasise the solidity of the charter market and remained unchanged this week, trading around **2 210 points** on Friday (**↑12%**, y/y). Declining freight rates and rising operating costs have pushed average carrier earnings to **8,4%** in Q2, with further margin erosion expected in the next two quarters that will push carriers' earnings into negative territory once again (more on this next week).[15]

**iv. Further developments of note**

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

1. **Blanked sailings expected for Chinese Golden Week:**
   a. Shippers must be prepared for blanked sailings and last-minute capacity reductions ahead of October's Chinese Golden Week holiday.[16]
   b. Currently, transpacific and Asia-Europe scheduled vessel capacity for 1-7 October is higher than in recent years, with the number of blanked sailings falling short of historical benchmarks.
   c. Drewry's "*Cancelled Sailings Tracker*" is currently trending at a low **6% of sailings** between 1 September and 5 October.[17]
2. **Zim reroutes vessels after Turkey announces ban on port calls:**
   a. Israeli carrier Zim is rerouting vessels away from Turkish ports following the government in Ankara's prohibition on port calls by Israeli vessels.[18]

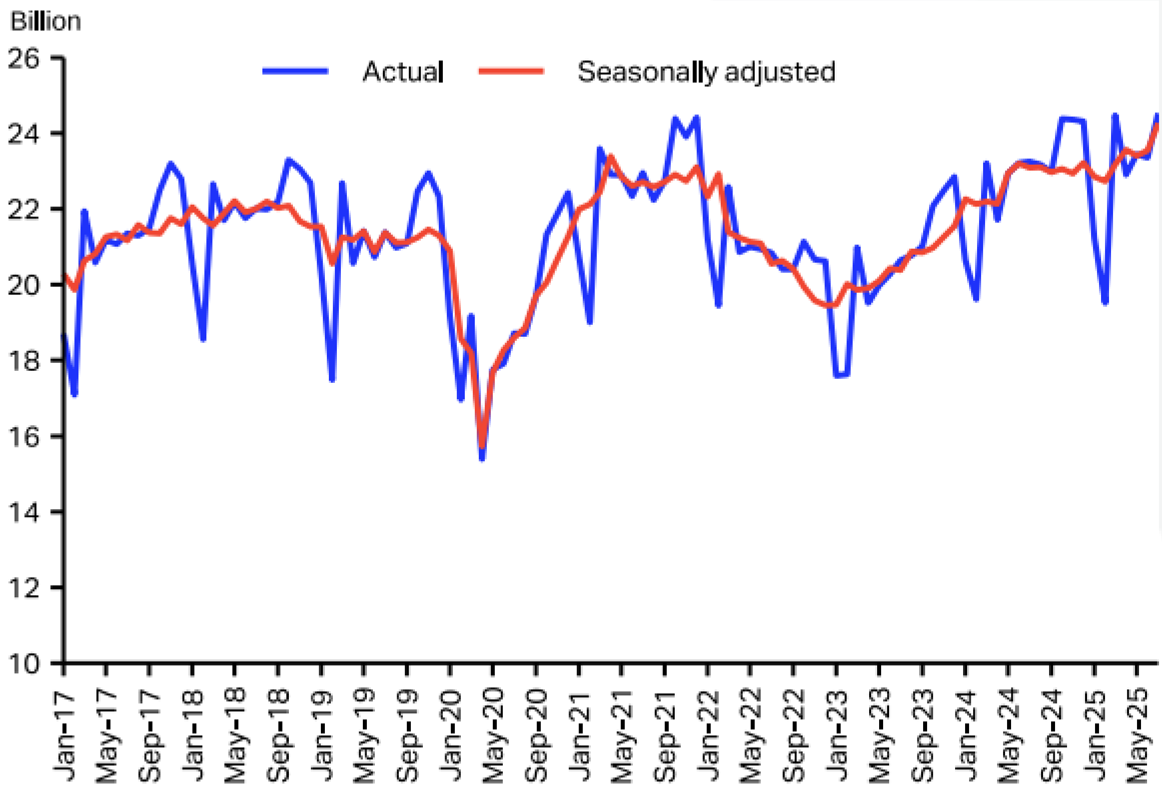
## c. Global air cargo industry

In July 2025, global air cargo demand (CTK) rose by an impressive by **↑5,5%** year-on-year, a sharp rebound from June's **↑0,6%** growth, driven by frontloading ahead of US tariff revisions. International CTK expanded by **↑6%** (y/y), led by Asia Pacific (**↑11%**) and Africa (**↑9,4%**). Capacity (ACTK) increased **↑3,9%** (y/y), with

[15] Linerlytica. 01/09/2025. Market Pulse – Week 35.
[16] Goldstone, C. 28/08/2025. Shippers should expect last-minute blanked sailings as Golden Week looms.
[17] Drewry. 29/08/2025. Cancelled sailings tracker.
[18] Whiteman, A. 26/08/2025. Zim reroutes vessels after Turkey announces ban on port calls.

belly-hold supply climbing ↑**7,3%**, as summer passenger demand expanded lift, while freight capacity rose only ↑**1,0%**. The global Cargo Load Factor (CLF) improved slightly to **45,1%**, with Africa posting the highest regional gain (↑**4,1%**, to **46,8%**).

*Figure 20 – Industry CTKs (billions)*



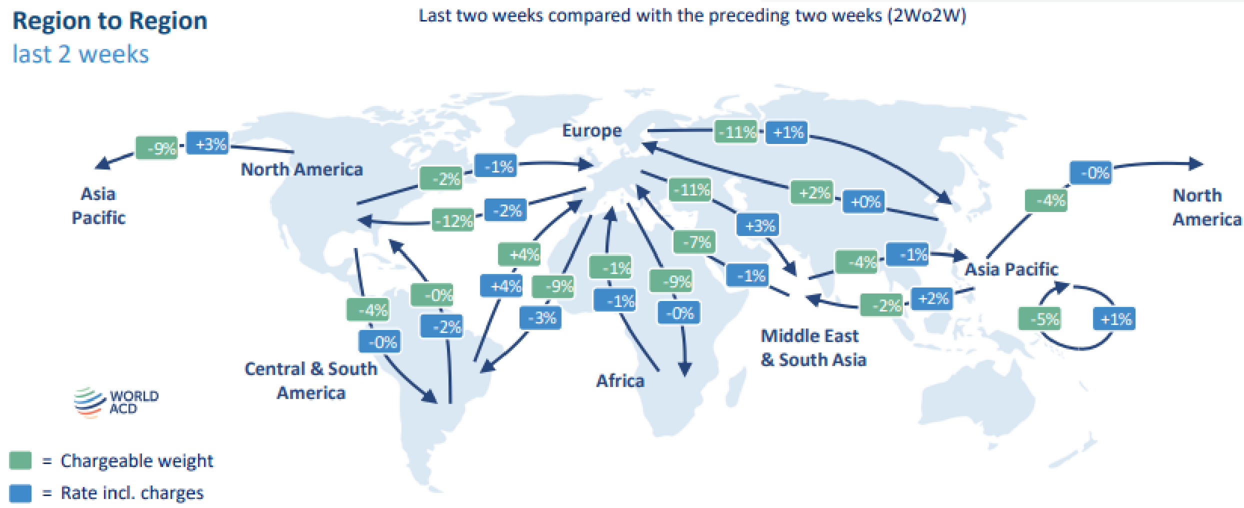

*Source:* *IATA*

Fuel costs continued easing, as jet fuel fell ↓**9,1%** (y/y – to **$92,4/bbl**), marking the fifth straight annual decline, although prices rose ↑**4,3%** (m/m) in July. Crude oil averaged **$71/bbl**, down ↓**16,8%** (y/y). Cargo yields dropped ↓**2,0%** (y/y), reflecting weaker rates, though edged up ↑**0,8%** (m/m).

Regionally, Asia–Europe (↑**13,5%**), Africa–Asia (↑**12,1%**), and Within Asia (↑**10,3%**) trade lanes showed substantial double-digit gains, while Asia–North America lagged (↓**1,0%**, y/y). Overall, demand outpaced capacity, but momentum risks are visible as global trade growth cools and manufacturing PMIs fall below neutral, highlighting tariff-driven uncertainty.

In the high-frequency metrics from World ACD, global chargeable weight rebounded ↑**4%** (w/w, 18–24 August), driven mainly by Japanese exports (↑**90%**, after last week's ↓**60%** drop), with Africa also showing growth (↑**3%**).

*Figure 21 – Region to region: chargeable weight, and rates (last two weeks, % change)*




*Source:* *World ACD*

Average global rates rose ↑**1%** (w/w) to **$2,44 per kilogram**, but remain ↓**2%** year-on-year. Africa was one of the few regions with year-on-year rate increases (↑**7%**), alongside Europe (↑**2%**), while Asia Pacific (↓**4%**), MESA (↓**15%**), and CSA (↓**2%**) declined. Rates in North America were flat. Overall, the market shows modest recovery in weight and pricing, though levels remain weaker compared to 2024

**ENDS**[19]

[19] **ACKNOWLEDGEMENT:**

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