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Cargo Movement Update #253[1]

Date: 28 September 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)	43 851	49 959	**93 810**	38 058	43 359	**81 417**	↑15%
Air Cargo (tons)	3 885	3 369	**7 254**	4 230	3 151	**7 381**	↓2%

Monthly Snapshot

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

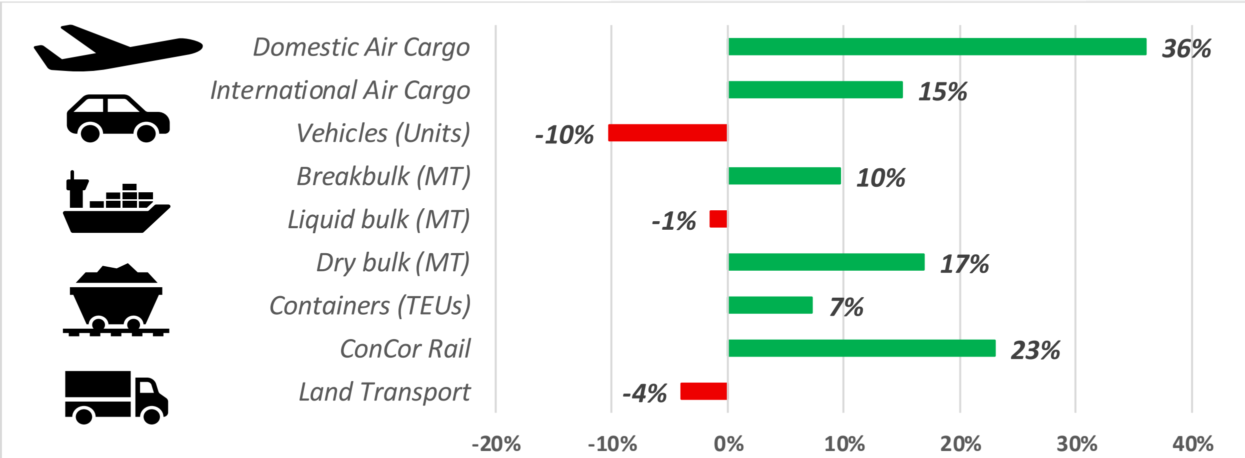
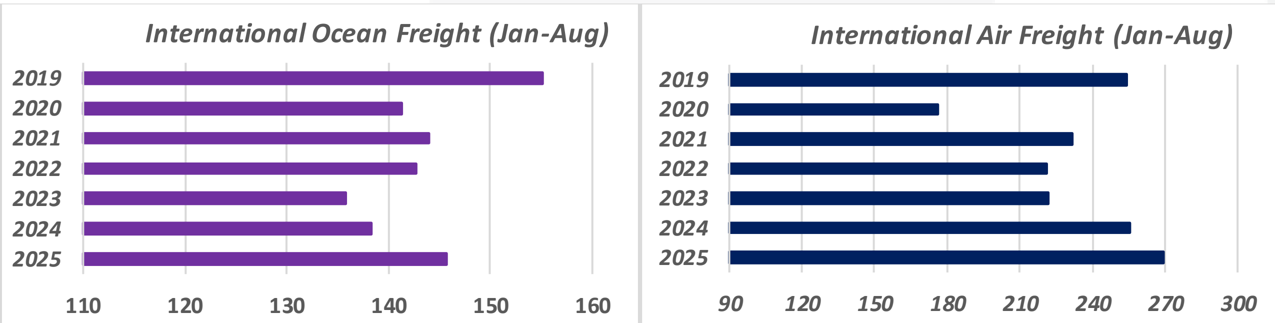


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~13 401 TEUs** was handled per day, with **~12 287 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 884** containers, up by ↑9% from last week.
- Cross-border queue: **↑1,4 hrs**; transit: **↑0,6 hrs**; SA borders: **~9,4 hrs** (**↓18%**); SADC: **~7,3 hrs** (**↑16%**).
- Drewry’s *Port Throughput Index* decreased by **↓1,1%** in July, but continues to be up annually (**↑4,1%**).
- Global spot rates dropped by another **↓7,9%** (or **$152**) to **$1 761/40ft** and remain down by **↓52%** (y/y).
- Global air cargo demand continues to hold steady, as rates are trending around **$2,44/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 *253rd* 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: August vs August.
[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 **13 401 TEUs** was handled daily, a significant increase from **11 631 TEUs** the previous week.

Smooth operations were mainly constrained by inclement weather, vacant berths, and equipment challenges. Adverse weather and equipment challenges disrupted operations in Cape Town, as high swells, inclement weather, and congestion prevented optimal productivity in Durban. Vacant berths, accompanied by bad weather, ensured operational delays at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. The latest Southern Africa Terminal and Service Update from Maersk, for Week 39, suggests that most of the significant South African terminals are currently fluid with no waiting times reported. The latest reports from TFR suggest that intermittent cable theft and locomotive breakdowns ensured operational delays on the Container Corridor this week, while ongoing locomotive issues resulted in slow-moving trains on the line between City Deep and Mafikeng.

Global container shipping faces intensifying pressures. Drewry's *"Port Throughput Index"* dipped **↓1,1%** in July but remains **↑4,1%** higher year-on-year, prompting an upgraded full-year growth forecast of **↑3,3%**. Regional trends were mixed, with North America surging to a two-year high while Asia contracted. Freight rates continued their slide – down **↓7,9%** this week and **↓52%** year-on-year – despite resilient charter rates, widening the disconnect between vessel supply and earnings. Overcapacity, trade tensions, and weather disruptions amplify recession risks, with mid-October rate restoration efforts unlikely to stabilise markets. Other notable developments include **(1)** US tariffs targeting key imports, **(2)** China's retaliation threats, and **(3)** extreme weather disruptions in Asia.

International air cargo lifted to and from ORTIA decreased slightly this week. The daily average of air cargo handled amounted to **~555 000 kg** inbound (**↓8%**, w/w) and **~481 000 kg** outbound (**↑7%**). Outbound numbers have trended particularly high of late – compensating for the slight decrease in inbound volumes. Consequently, the current levels mean that cargo is still trending significantly above last year's level (**~↑10%**) and the comparative levels of pre-pandemic 2019 (**~↑11%**).

Operationally, Foreign Operator Permits (FOPs) continue to be closely monitored, with the Department of Transport reminding airlines to comply with the requirement to carry original, valid permits on board at all times. Operators found non-compliant risk enforcement actions, including the suspension of flight operations. Elsewhere, FAOR is experiencing delays as ATNS advises that SIDs are unavailable, requiring non-standard departures (RWY 03 to 8 000 ft) with ATC tactically sequencing mixed aircraft traffic to maintain efficiency despite expected delays.

Internationally, IATA provides another update on Sustainable Aviation Fuel (SAF), which is central to aviation's net-zero 2050 target, with demand projected to reach ~500 Mt annually versus ~2 Mt today. Regional leadership – especially from North America, Brazil, China, India, Europe, and East Asia – will be critical to scaling production. Success hinges on accelerated technology deployment, reliable feedstock supply, and strong policy support. Number-wise, demand held steady, but year-on-year deficits widened, especially in Asia Pacific–US lanes (**↓20%**), hit by new US tariffs and e-commerce curbs.

Cargo movements along the N4 corridor increased for road transport and for rail transport. Truck volumes through the border post increased to around **1 489 HGVs per day** (**↑4%**, w/w). Queue times increased to an average of **~5,5 hours** (**↑17%**) at the border. The average processing time also increased to an average of

~5,3 hours (**↑20%**) per crossing. The rail to Maputo decreased to an average of **11 trains daily** (up by **two** from last week). Sugar trains from Eswatini were stable at around **one train a day**.

Land border crossing times – on average – increased slightly across the SADC region. Overall, the average queue time increased by approximately **an hour and a half** from last week, while transit time increased by about **half an hour**. The median border crossing times at South African borders decreased by approximately **two hours**, averaging **~9,4 hrs** (**↓18%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) increased by around **an hour**, averaging **~7,3 hrs** (**↑16%**). This week, on average, four SADC borders took around a day to cross, namely Beitbridge, Kasumbalesa (the worst affected, taking nearly **two days** from the **Zambian side**), Katima Mulilo, and Oshikango. Other developments of note include **(1)** the DRC lifting its cobalt export ban on 16 October and replacing it with strict quota limits while a derailment near Fungurume caused major disruptions, **(2)** severe congestion and operational issues at South African borders, notably at Groblersbrug and Kopfontein, and **(3)** regulatory shifts and enforcement concerns in Zambia (sulphuric acid export liberalisation) and Botswana (disputed penalties at Kazungula).

As often reiterated, South Africa's logistics system will need to evolve through the development of **freight villages and inland hubs** to support efficiency, competitiveness, and sustainable growth. In this context, the **Port of Gauteng** has published a White Paper proposing a **R50 billion inland port and logistics hub** to ease pressure on the Durban–Gauteng freight corridor by shifting volumes from road to rail in line with the National Development Plan's freight-modal objectives.[6] The proposal includes performance-based standard (PBS) vehicles, renewable energy systems, and high-throughput terminals, with the potential to generate more than 50 000 permanent jobs and improve the corridor's overall competitiveness.

[6] Parker, D. 30/09/2025. Port of Gauteng unveils White Paper proposing inland port to ease Durban-Gauteng freight corridor strain.

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 22 to 28 September (measured in TEUs)

7-day flow reported (22/09/2025 – 28/09/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 804	33 626	↓5%
New Pier (Pier 1)	2 074	14 521	↑21%
Cape Town Container Terminal	1 575	11 027	↓31%
Ngqura Container Terminal	3 173	22 208	↑151%
Port Elizabeth Container Terminal	868	6 078	↑82%
Other	907	6 350	↑7%
Total	**13 401**	**93 810**	↑15%

Source: Calculated from TPT, 2025. Updated 28/09/2025.

An increased average of **~13 401 TEUs** (↑15%) was handled per day for the last week (*22 to 28 September, Table 2*). Throughput was above the projected average of **~12 026 TEUs** (↑11% actual versus projected).

For the coming week, a decreased average of **~12 287 TEUs** (↓8%) is predicted to be handled (*29 September to 5 October*, *Table 3*).

Smooth operations were mainly constrained by inclement weather, vacant berths, and equipment challenges.

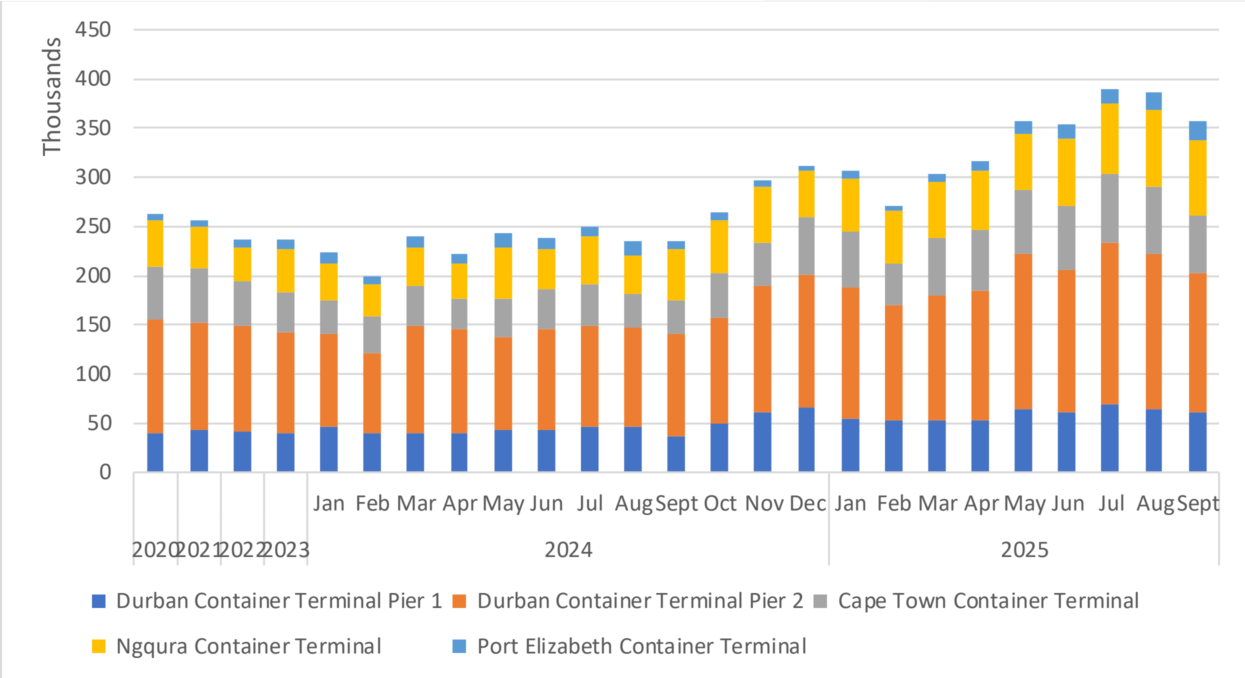
Table 3 – Container Ports – Weekly flow projected for 29 September to 5 October (measured in TEUs)

7-day flow projected (29/09/2025 – 05/10/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 124	35 865	↑7%
New Pier (Pier 1)	1 964	13 747	↓5%
Cape Town Container Terminal	1 754	12 281	↑11%
Ngqura Container Terminal	2 112	14 781	↓33%
Port Elizabeth Container Terminal	414	2 900	↓52%
Other	919	6 433	↑1%
Total	**12 287**	**86 007**	↓8%

Source: Calculated from TPT, 2025. Updated 28/09/2025.

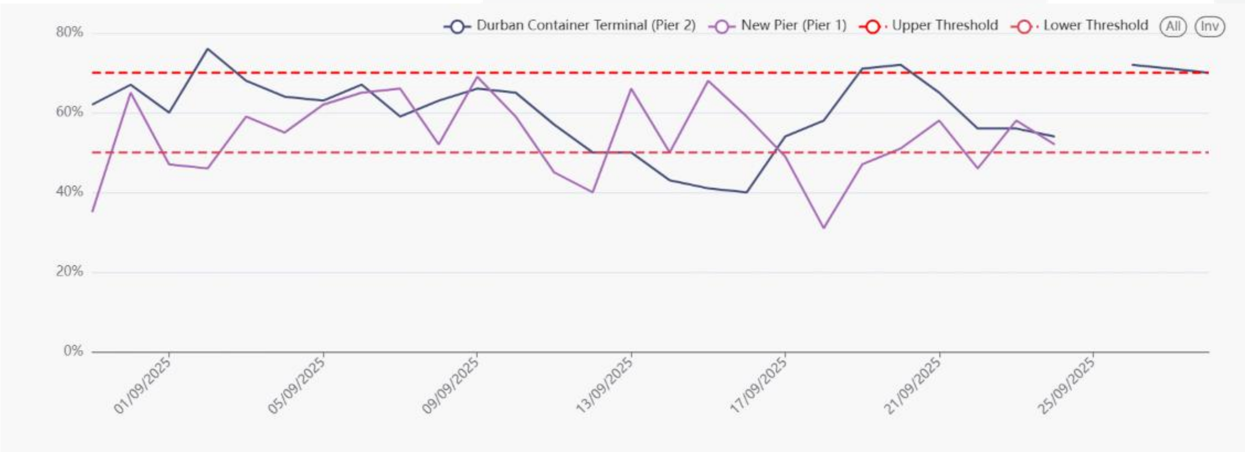
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2025, and updated 28/09/2025.

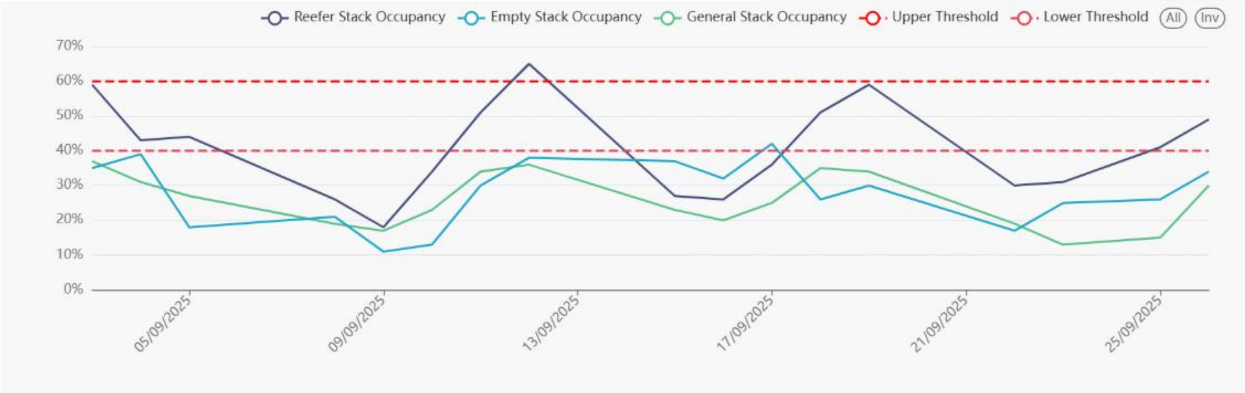
Figure 4 – Stack occupancy in DCT, general-purpose containers (30 August to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 28/09/2025.

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 (30 August to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 28/09/2025.

b. Summary of port operations

i. Weather and other delays

- Adverse weather and equipment challenges disrupted operations in Cape Town.
- High swells, inclement weather, and congestion prevented optimal productivity in Durban.
- Vacant berths, accompanied by bad weather, ensured operational delays at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

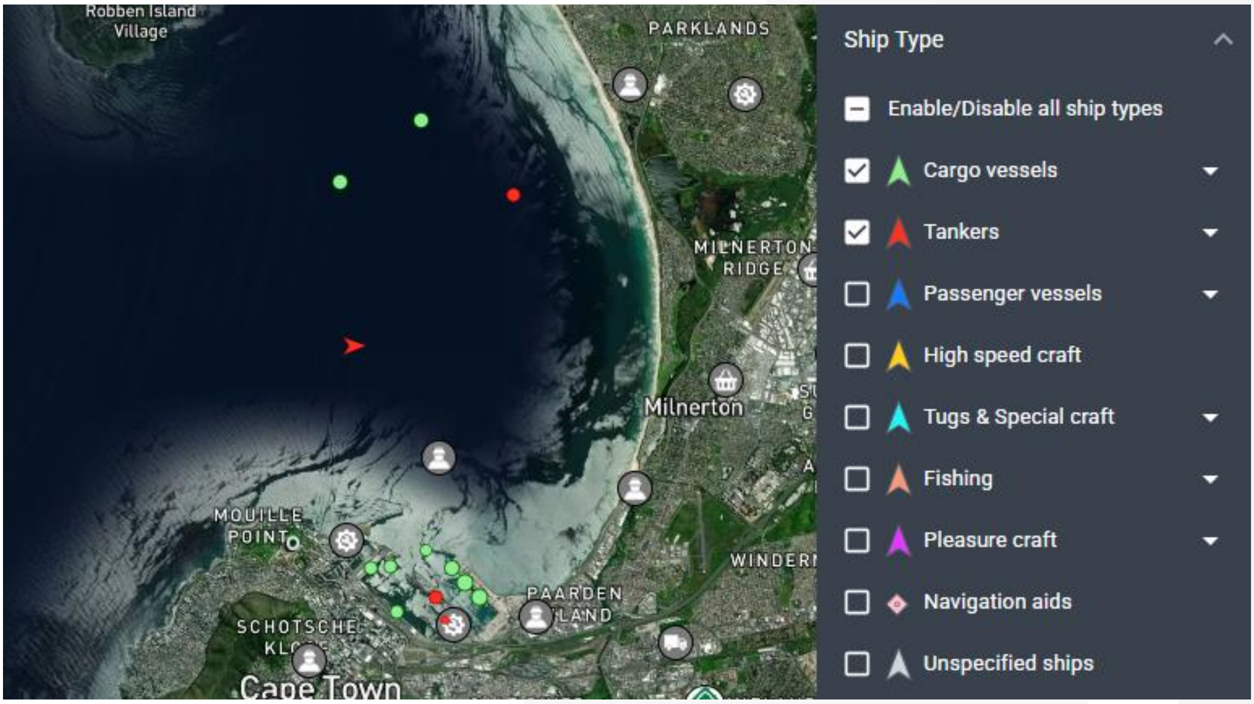
ii. Cape Town

On Friday, CTCT recorded three vessels at berth and one at anchor, as adverse weather conditions and high swells proved to be the primary operational constraints at the port. On the landside, between Monday and Thursday, the terminal managed to service at least 2 290 trucks while handling approximately 57 rail units. On the waterside, the terminal executed approximately 3 374 container moves across the quay during the same period. Additionally, this week, the terminal operated with **7-8 STS cranes**, **27-30 RTGs**, and approximately **59 hauliers**.

On Friday, CTMPT had two berthed vessels, with zero vessels waiting at outer anchorage. During the previous 24-hour period, the terminal managed to handle 105 TEUs and 4 168 tons on the waterside, while servicing approximately 29 trucks on the landside. Stack occupancy figures were recorded at 0% for the general stack, 0% for reefers, and 0% for empties. For the majority of the week, the terminal operated with three cranes (only two of which had operational spreaders) and three straddle carriers.

Between 15 and 21 September, the FPT terminal handled six vessels: three multi-cargo and three container vessels. Berth occupancy during this period was recorded at 62%. The terminal planned to hold six more vessels between 22 and 28 September, with another six vessels scheduled between 29 September and 5 October. Minimal operational delays were reported during this period.

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



Source: Marine Traffic. Updated 28/09/2025 at 14:00.

iii. Durban

On Friday, Pier 1 recorded two vessels on berth, with one vessel at anchor. Between Monday and Friday, the terminal executed at least 3 482 gate moves and 378 rail moves on the landside *(This period excludes the public holiday of last week as no data is available for this particular day)*. The **average TTT** for the week was **~44 minutes** (**↓28%**, w/w) and an average **staging time** of **~38 minutes** (**↓10%**). Additionally, the terminal moved over 5 800 TEUs across the quay on the waterside during the same period. The terminal had between **three and four STS cranes** and **15-18 RTGs** available for the most significant part of the week.

Pier 2 had four vessels on berth and four at anchorage on Friday, as equipment breakdowns prevented optimal operational performance this week. The terminal operated with **8 to 12 gangs** and moved over **13 100** containers across the quay between Monday and Friday on the waterside. Approximately **10 469** gate moves were executed on the landside during the same period *(This period excludes the public holiday of last week as no data is available for this particular day)*. The **average TTT** for the week was **~81 minutes** (**↑7%**, w/w) and an average **staging time** of **~98 minutes** (**↑21%**). Approximately 2 120 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **69** and **73** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **66%** during this period.

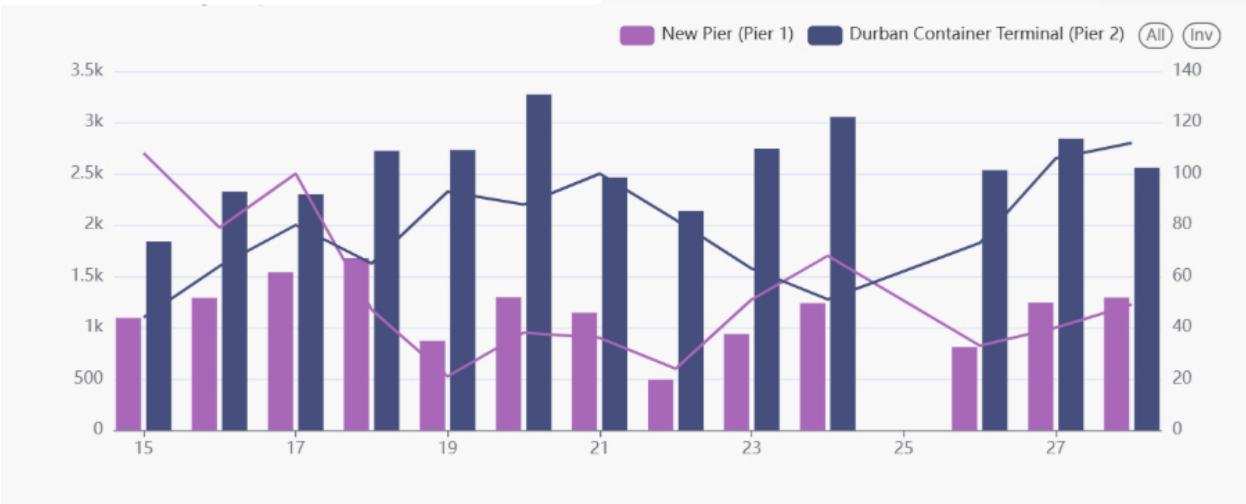
Durban's MPT terminal recorded two vessels at berth on Friday and one at outer anchorage. Stack occupancy for containers was recorded at 36% and the breakbulk stack at 5%. In the preceding 24 hours, 500 containers but zero tons of breakbulk were handled on the waterside. On the landside, 456 container trucks were serviced at a TTT of ~43 minutes. Additionally, 141 breakbulk trucks were serviced. During this period, two cranes, eight reach stackers, seven forklifts, and 19 ERFs were in operation. The third crane went out of commission towards the end of the week due to undisclosed reasons and is anticipated to return to service around 2 October. Additionally, the fourth crane is still on track to return to service around 22 December.

Between Thursday and Friday, the Maydon Wharf MPT recorded one vessel at berth and zero at anchorage. On the waterside, the terminal managed to handle around 1 007 tons, while 47 trucks were handled on the landside. During the same period, the agri-bulk facility had one vessel at berth and zero at anchor. On the waterside, the terminal managed to handle around 571 tons, with no volumes being handled on the landside.

On Friday, the Ro-Ro terminal in Durban recorded three vessels on the berth, with zero at anchorage. In the preceding 24 hours, the terminal handled 1 725 road units and 297 units on rail on the landside, while 2 352 units were handled on the waterside. Overall stack occupancy was recorded at 77%. Earlier this week, the terminal had 163 abnormal loads and managed to handle 67.

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.

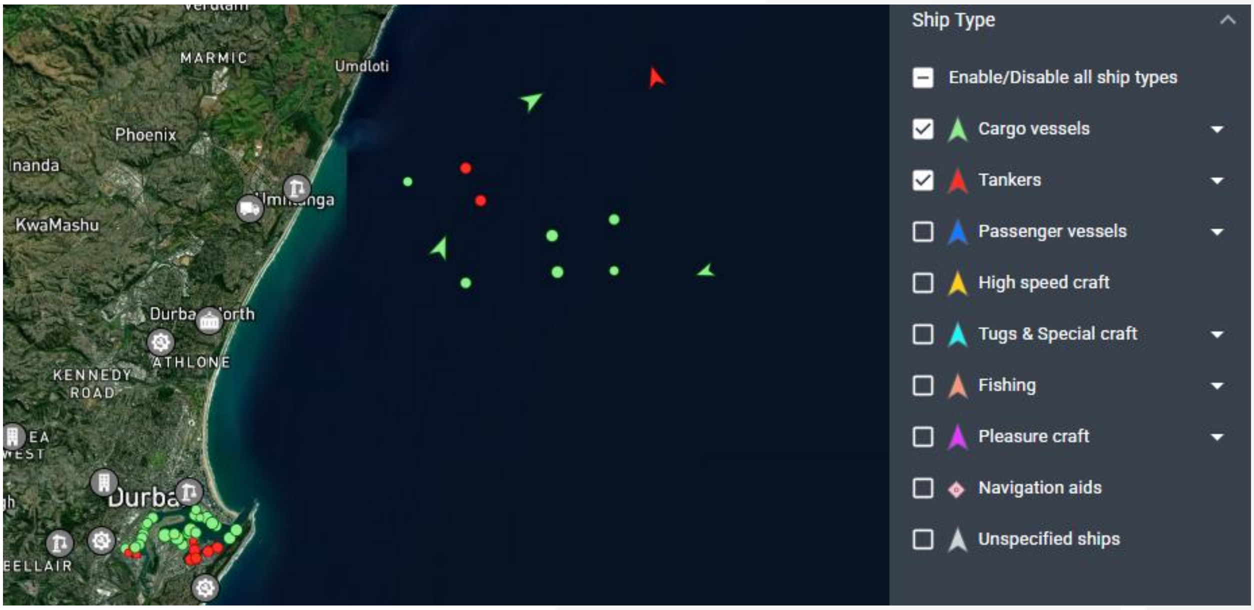
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 28/09/2025.

The queue of container vessels waiting outside Durban has increased again this week, again at DCT Pier 2. On Monday evening (28 September), **one** container vessel was waiting outside at anchorage for Pier 1, **seven** for Pier 2, and **one** for Point. The queue of dry (**five**), liquid (**six**), and breakbulk (**three**) vessels has also remained relatively stable since last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 28/09/2025 at 14:00.

iv. Richards Bay

On Monday (29 September), the Port of Richards Bay had seven vessels at anchor and 14 on the berth, translating to six vessels at DBT, three at MPT, four at RBCT, and one at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter were deployed to support marine resources towards the end of the week.

The daily average coal throughput for the week increased and averaged around **189 600 tons** (**↑19%**, w/w) a day. An average of **21 trains** was serviced on the landside (down by **one** from last week), and slightly below the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded two vessels on berth and one at anchor, with no 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 19% for reefers and 28% for the general stack. There were instances this week where the berths were not fully occupied. Moreover, despite experiencing adverse weather, the terminal handled approximately 3 093 TEUs on the waterside. Approximately 501 trucks were processed on the landside at a TTT of ~30 minutes. For the most significant part of the week, the terminal had seven STS cranes, between 23 and 24 RTGs, and around 56 hauliers in service.

On Wednesday, 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, 347 trucks were processed at a TTT of ~41 minutes on the landside, while 1 497 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 26% for the general stack and 31% for reefers. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and eight straddles in service.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that intermittent cable theft and locomotive breakdowns ensured operational delays on the Container Corridor this week, while ongoing locomotive issues resulted in slow-moving trains on the line between City Deep and Mafikeng. During the week, DCT Pier 2 had 604 ConCor units on hand with a dwell time of 120 hours and 377 over-border units with a dwell time of 58 days.

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

Source: Calculated using data from Transnet, 2024. Updated 28/09/2025.

In the last week (*22 to 28 September*), rail cargo on the ConCor line out of Durban was reported at **3 884** containers, up by ↑9% from the previous week's **3 579** containers.

vii. General

The latest Southern Africa Terminal and Service Update from Maersk, for Week 39, suggests that most of the major South African terminals are currently fluid with no waiting times. Caution is raised for PECT as the terminal is anticipating adverse weather next week. DCT Pier 1 and Pier 2 currently both have waiting times of between 0 and 2 days.

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 (*22 to 28 September*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *September 2024* averaged **~938 000 kg**.

Table 4 – International inbound and outbound cargo from OR Tambo

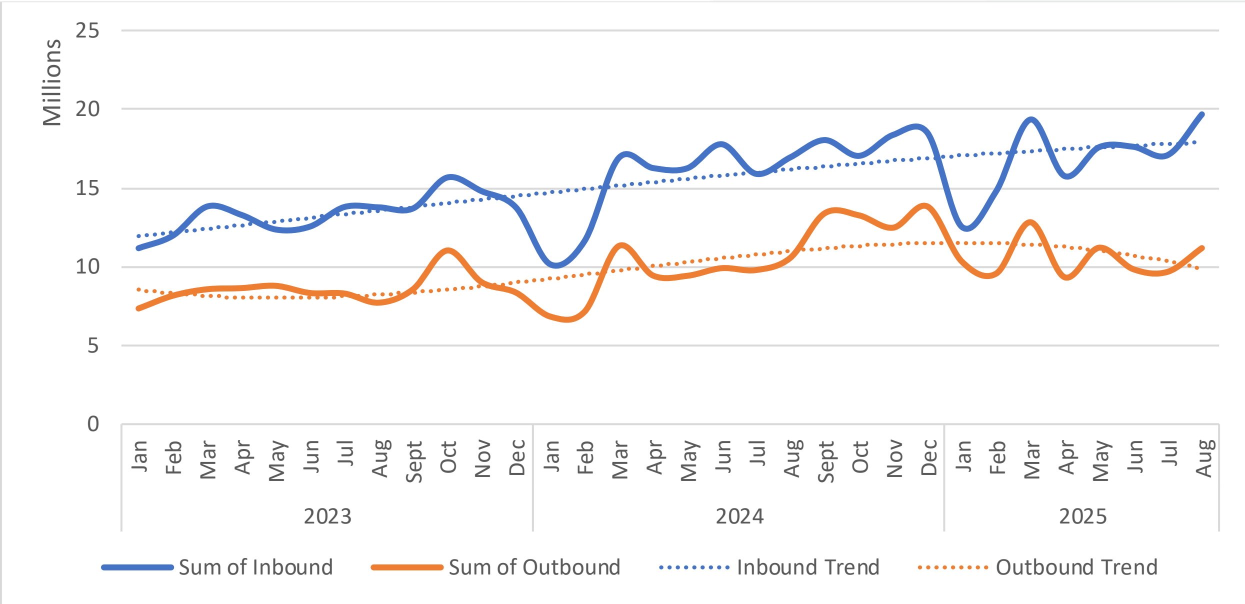
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	555 018	3 885 124	↓8%
Volume outbound	481 250	3 368 748	↑7%
Total	1 036 267	7 253 872	↓2%

Courtesy of ACOC. Updated: 28/09/2025.

The daily average of air cargo handled amounted to **~555 000 kg** inbound (**↓8%**, w/w) and **~481 000 kg** outbound (**↑7%**). Outbound numbers have trended particularly high of late – compensating for the slight decrease in inbound volumes. Consequently, the current levels mean that cargo is still trending significantly above last year's level (**~↑10%**) and the comparative levels of pre-pandemic 2019 (**~↑11%**).

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

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



Calculated from ACOC. Updated: 28/09/2025.

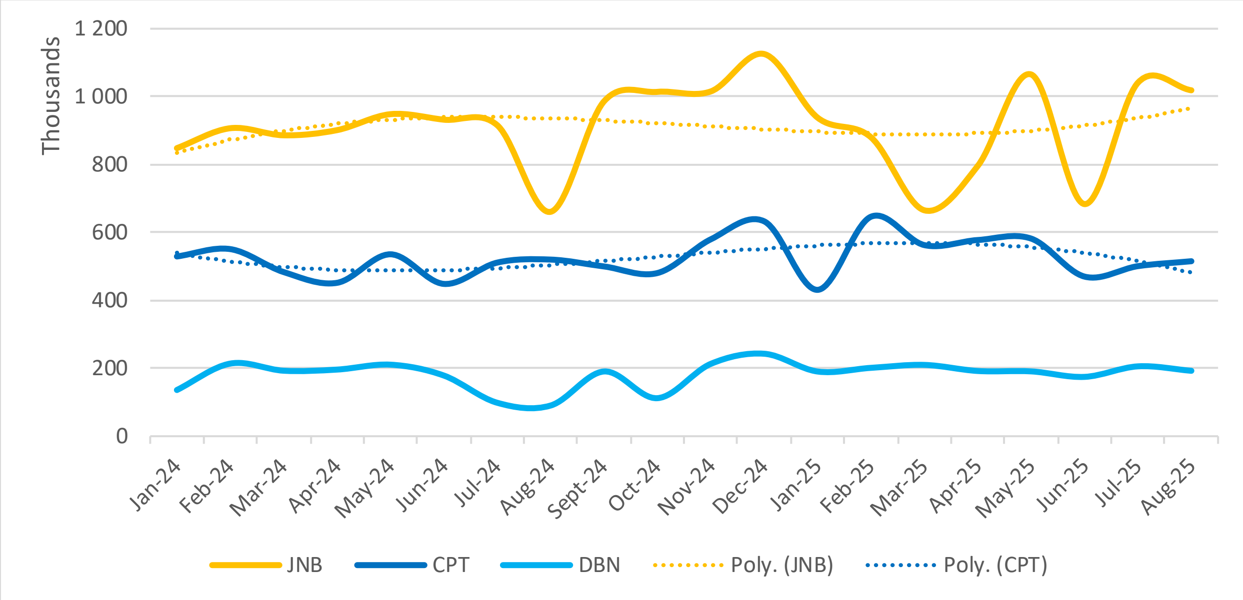
b. Air cargo operations

Foreign Operator Permits (FOPs) continue to be closely monitored, with the Department of Transport reminding airlines to comply with the requirement to carry original, valid permits on board at all times. Operators found non-compliant risk enforcement actions, including the suspension of flight operations. Elsewhere, FAOR is experiencing delays as ATNS advises that SIDs are unavailable, requiring non-standard departures (RWY 03 to 8 000 ft) with ATC tactically sequencing mixed aircraft traffic to maintain efficiency despite expected delays.

c. Domestic air cargo

The following figure shows the movement since the start of last year:

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 28/09/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*22 to 28 September*), movements along the N4 corridor increased for road transport and also increased for rail transport.

- Truck volumes through the border post increased to at around **1 489 HGVs per day** (**↑4%**, w/w).
- Queue times increased to an average of **~5,5 hours** (**↑17%**) at the border.
- The average processing time also increased to an average of **~5,3 hours** (**↑20%**) per crossing.
- The rail to Maputo decreased to an average of **11 trains daily** (up by **two** from last week).
- Sugar trains from Eswatini were stable at around **one train a day**.

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

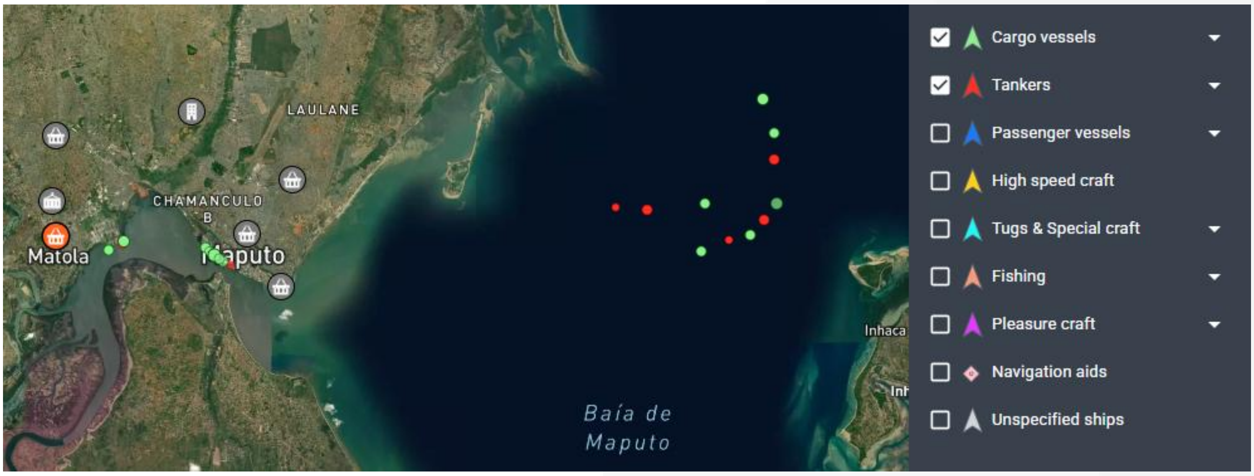
Table 5 – Lebombo border post update

	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	**1489**	**1446**	**1113**	**211**	**36**	**86**	**31**	**290**	**11**	**9**	**2**	**1**
% (w/w)	**4%**	**3%**	**8%**	**-15%**	**2%**	**-4%**	**-22%**	**-1%**	**17%**	**9%**	**-11%**	**0%**
% 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 28/09/2025.

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 28/09/2025 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 half** from last week, while transit time increased by about **half an hour**.
- The median border crossing times at South African borders decreased by approximately **two hours**, averaging **~9,4 hrs** (**↓18%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by around **an hour**, averaging **~7,3 hrs** (**↑16%**).

1. **Zimbabwe (Harare):** ZACC received complaints after a transporter was harassed outside a client's premises.
2. **DRC:**
   a. Ban on cobalt exports will be lifted on 16 October, replaced by a quota system.
   b. 18 125 tons permitted for export in 2025 remainder; annual caps of 96 600 tons set for 2026 and 2027.
   c. A train derailment at Fungurume (Kolwezi–Lubumbashi line) blocked the road on Monday; rerouting is advised due to extended clean-up delays.
3. **South Africa:**
   a. Skilpadshek Border: Temporarily closed Tuesday for hazardous goods exercise.
   b. Groblersbrug: 3–4 day queueing times; disputes among BMA, CBRTA, and Truck Park Operators over responsibility.
   c. Kopfontein: Power outage on Wednesday led to diversions to other Northwest borders; no on-site diesel available, had to be purchased.
   d. Groblersbrug (BURS): Network issues persisted for 5 days, impacting crossing times.
4. **Zambia:** Revoked SI No.57 of 2025; sulphuric acid exports are now permitted without restrictions.
5. **Botswana (Kazungula):** BURS officers reportedly demanding up to 4 000 Pula in penalties for transit overstays; transporters advised drivers not to pay, as penalties are invalid during congestion.

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

Table 6 – Delays[7] summary – South African borders[8] (both directions)

Border Post	Direction	HGV[9] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	463	23,7	6,5	29,0	13 890	3 241
Beitbridge	Zimbabwe-SA	444	12,7	2,4	13,1	13 320	3 108
Groblersbrug	SA-Botswana	249	27,7	2,5	20,6	7 470	1 743
Martin’s Drift	Botswana-SA	186	6,4	0,3	1,4	5 580	1 302
Kopfontein	SA-Botswana	222	14,3	1,2	6,1	6 660	1 554
Tlokweng	Botswana-SA	23	0,6	0,2	0,4	690	161
Vioolsdrift	SA-Namibia	30	3,7	1,0	3,0	900	210
Noordoewer	Namibia-SA	20	1,7	0,3	1,5	600	140
Nakop	SA-Namibia	30	4,0	1,3	5,1	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,4	1,2	600	140
Skilpadshek	SA-Botswana	310	7,8	1,1	3,6	9 300	2 170
Pioneer Gate	Botswana-SA	61	1,1	1,0	2,2	1 830	427
Ramatlhabama	SA-Botswana	159	1,7	0,4	2,5	1 170	273
Ramatlhabama	Botswana-SA	39	0,4	0,1	0,4	4 770	1 113
Lebombo	SA-Mozambique	1 425	5,5	1,3	5,3	42 750	9 975
Ressano Garcia	Mozambique-SA	1 376	2,2	0,3	2,1	41 280	9 632
Sum/Average		**5 057**	**7,2**	**1,3**	**6,1**	**151 710**	**35 399**

Source: TLC, FESARTA, & Crickmay, week ending 21/09/2025.

Table 7 – Delays summary – Corridor perspective

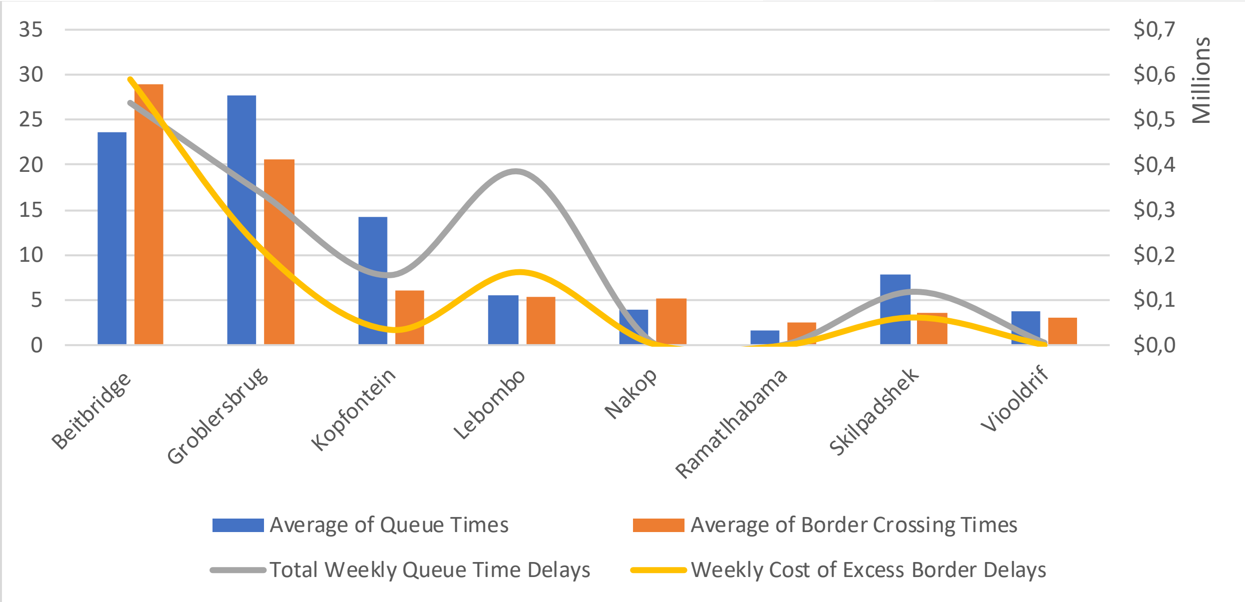
Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	12,5	3,0	12,3	9 600	2 240
Central Corridor	798	3,1	0,4	3,0	23 940	5 586
Dar Es Salaam Corridor	1 819	12,2	1,3	12,0	54 570	12 733
Maputo Corridor	2 801	3,9	0,8	3,7	84 030	19 607
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 299	14,3	1,8	13,6	98 970	23 093
Northern Corridor	2 817	2,8	0,7	2,8	92 520	21 588
Trans Caprivi Corridor	844	3,6	0,6	2,4	25 320	5 908
Trans Cunene Corridor	100	2,6	0,7	2,7	3 000	700
Trans Kalahari Corridor	116	13,9	1,4	28,1	3 480	812
Trans Oranje Corridor	100	57,8	2,1	23,8	3 000	700
Sum/Average	**13 141**	**8,4**	**1,0**	**7,5**	**402 240**	**93 856**

Source: TLC, FESARTA, & Crickmay, week ending 21/09/2025.

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

[7] 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.
[8] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[9] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

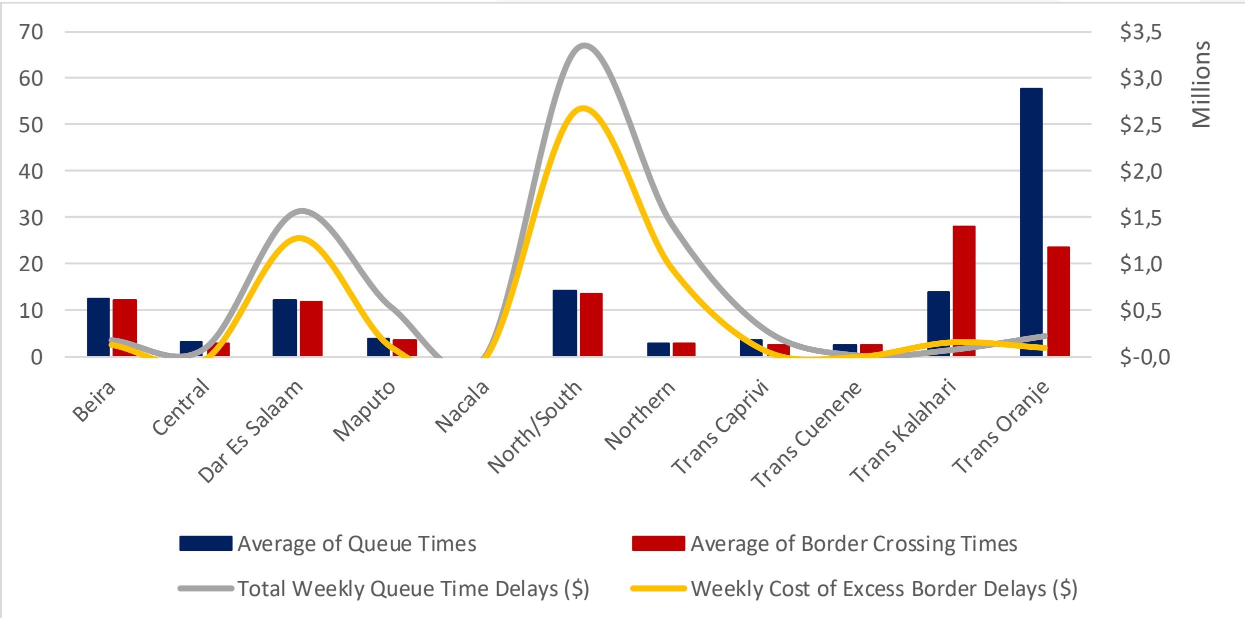
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 21/09/2025.

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

Figure 14 – Weekly cross-border delays & estimated cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 21/09/2025.

In summary, cross-border queue time averaged **~8,4 hours** (up by **~1,4 hours** from the previous week's **~7,0 hours**), indirectly costing the transport industry an estimated **$7,7 million** (**R134 million**). Furthermore, the week's average cross-border transit times also hovered around **~7,5 hours** (up by **~0,6 hours** from the **~6,9 hours** recorded in the previous report), at an indirect cost to the transport industry of **$5,4 million** (**R94 million**). As a result, the total indirect cost for the week amounts to an estimated **~$13,2 million** (**R228 million**, down by **↓7,7%** from the **~R247 million** in the previous report), as more congested border posts increased disproportionately compared to the less congested border posts.

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.

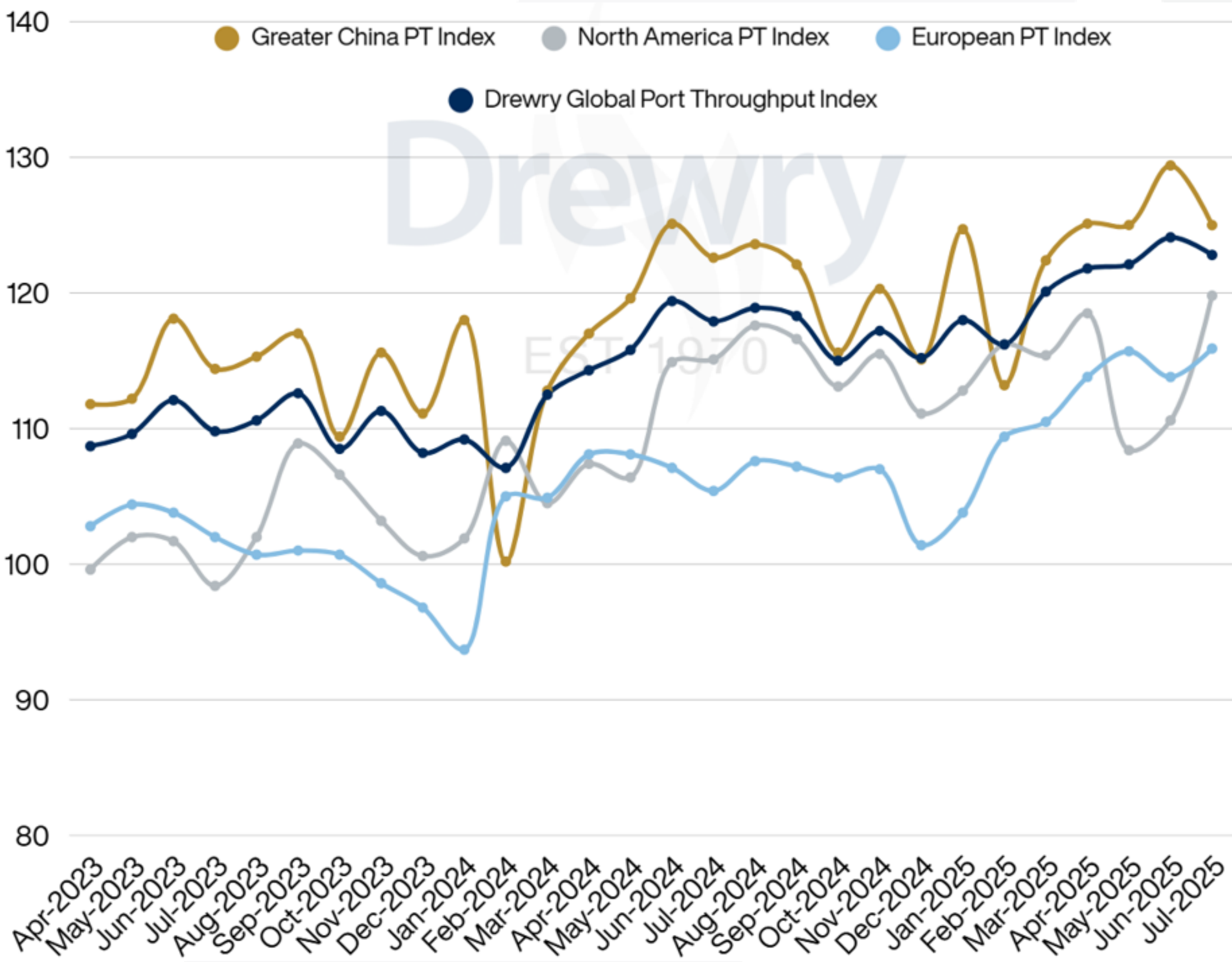
a. Global shipping industry

i. Container port throughput

The Drewry "*Global Container Port Throughput Index (PTI)*" decreased by **↓1,1%** in July, but continues to be up year-on-year (**↑4,1%**). Consequently, Drewry notes that the global market has continued to outperform expectations, and as such Drewry further upgraded its full year growth forecast to **↑3,3%** in August. Regionally, the following changes are noted:

- The Greater China Container Index fell **↓3,4%** (m/m) in July 2025, but remained up **↑2,0%** (y/y).
- The North and Southeast Asia Index decreased **↓3,0%** (m/m) in July to **120,4 points**, but was up **↑3,7%** (y/y).
- The North American Index spiked **↑8,3%** (m/m) in July to **119,8 points**, up **↑4,1%** (y/y) to the highest point in over two years.
- The African Index decreased **↓1,9%** (m/m) in July to **109,3 points**, up **↑5,4%** (y/y).

Figure 15 – Container Port Throughput Index (index, 2019 = 100)



Source: [Drewry]

ii. Global industry summary

Global container shipping is under mounting pressure. After a brief spike earlier in 2025, Africa–Europe freight rates are now softening, as carriers redeploy capacity and trade flows shift.[10] Meanwhile, analysts warn of growing odds of a container shipping recession, driven by overcapacity, softer demand and rate volatility.[11] On the policy front, China has threatened "tit for tat" retaliation in response to USTR port fees on Chinese vessels.[12] Simultaneously, recent heavy US tariffs on transpacific goods (notably furniture) threaten recovery in freight rates.[13] And in China, heightened controls over "dual-use" cargoes are forcing forwarders into compliance scramble.[14] Also, US consumers face further inflationary pressures as tariffs expand to include timber imports, exacerbating cost pressures.[15]

Elsewhere, extreme weather conditions in South China and North Vietnam have severely disrupted vessel schedules with elevated port congestion in the Far East persisting through the week. The disruptions failed to support freight rates which remain in freefall even as attention shifts to carriers' mid-October rate restoration efforts to stop the bleeding. However, prospects are bleak given the weak cargo volumes and lack of capacity curbs. New US tariffs targeting kitchen cabinets and furniture will further hit container volumes already reeling from earlier import tariffs.[16]

iii. Global freight rates

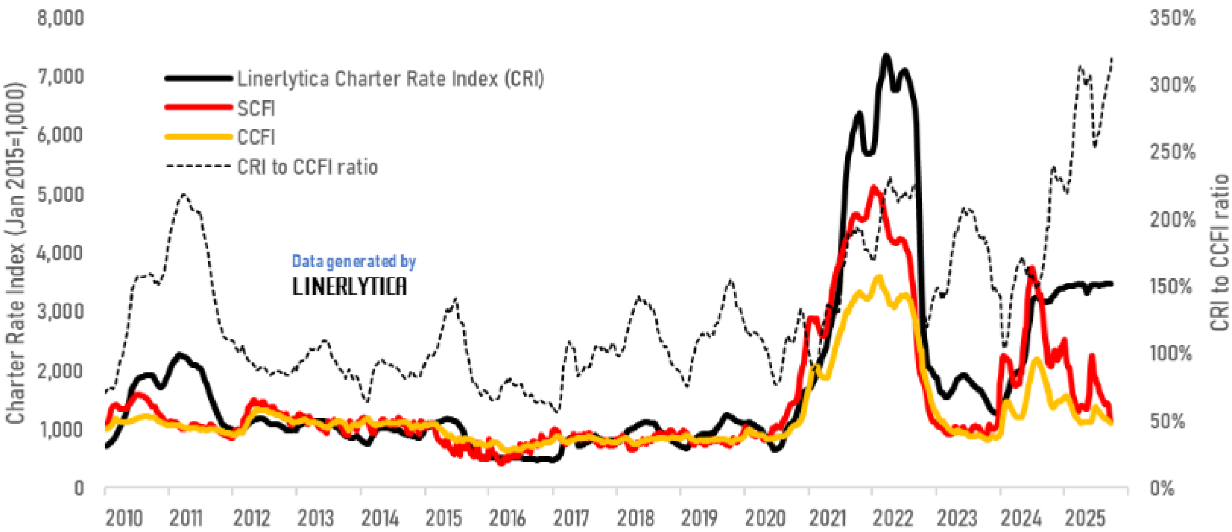
Global freight rates decreased again this week. Drewry's "*World Container Index*" dropped by **↓7,9%** (or **$152**) to **$1 761 per 40-ft container** this week.[17] This week's container freight rate decline was driven primarily by steep drops on the Shanghai → Los Angeles (**↓10%**) and Shanghai → Rotterdam/Shanghai → Genoa (**↓7-9%**) trade lanes. Overall, rates remain down by **↓52%** (y/y). Meanwhile, charter rates remain robust, as the *Harper Petersen Index* (Harpex) is trading around **2 212 points** on Friday (**↑0,1%**, w/w).[18]

Operating margins have already dropped below breakeven on several key routes after the recent rate slide but carriers have continued to prioritise market share over profitability as the disconnect between charter and freight rates has widened to a record high.

The story continues, as rates have fallen sharply from their 2024 highs, but charter rates and vessel prices remain firm as carriers compete for tonnage, highlighting persistent challenges in capacity discipline. With only minimal service withdrawals announced, the planned mid-October rate hikes are unlikely to hold, raising the risk of further freight rate weakness into Q4. The divergence has been spectacular of late:

[10] Lennane, A. 25/09/2025. Africa-Europe rates drop as trade shifts and carriers redeploy capacity.
[11] Richards, D. 26/09/2025. Analysis: a container shipping recession: what are the odds.
[12] Van Marle, G. 30/09/2025. China announces 'tit-for-tat' retaliation as USTR port fees loom.
[13] Koo, A. 30/09/2025. New US tariffs on key transpacific cargo will crush hopes.
[14] Mwanalushi, K. 30/09/2025. Forwarders scramble as Beijing ramps up dual-use cargo.
[15] Goldstone, C. 30/09/2025. US consumers face more price hikes as Trump announces more tariffs.
[16] Linerlytica. 29/09/2025. Market Pulse – Week 39.
[17] Drewry. 25/09/2025. World Container Index.
[18] Harpex. 26/09/2025. Harper Petersen Index.

Figure 16 – Container Charter Freight Index (CCFI) vs Freight Rate Index (SCFI)

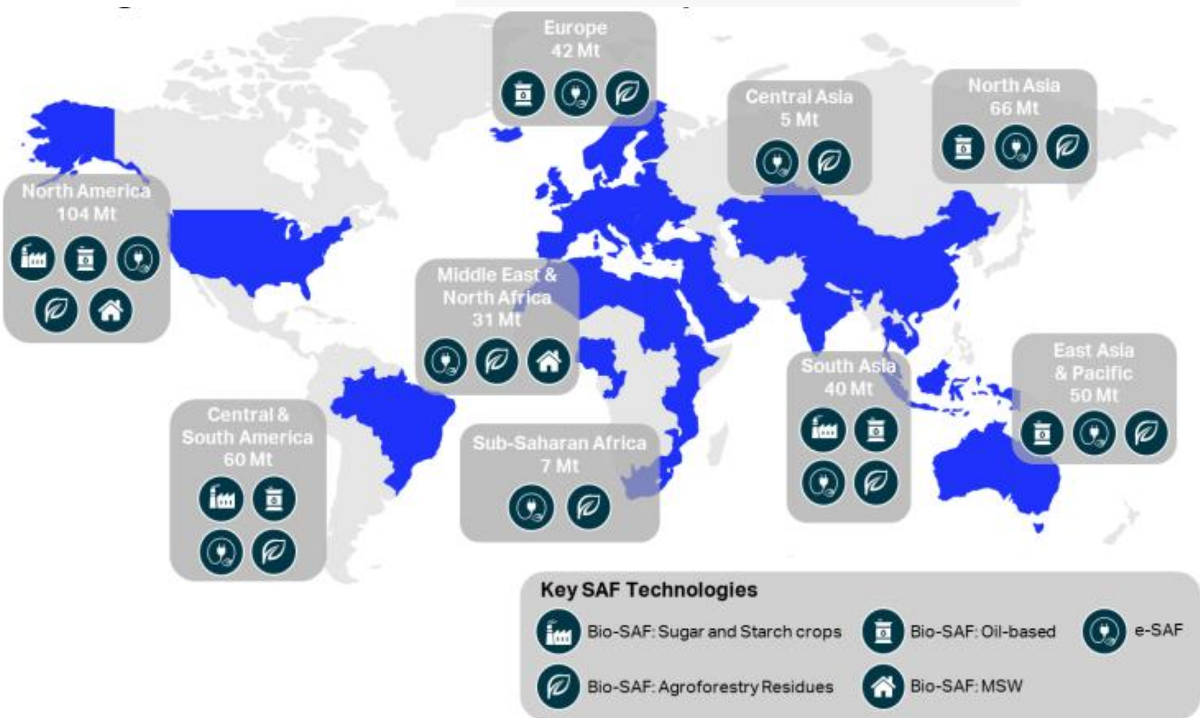


Source: Linerlytica

b. Global air cargo industry

As a follow-up to the report last week on Sustainable Aviation Fuel (SAF), IATA forecasts aviation will require **~500 Mt** of sustainable aviation fuel (SAF) by 2050, versus **~2 Mt** today. By mid-century, North America is projected to lead with over **100 Mt**, with significant contributions from Brazil, China, India, Europe, and East Asia. Key constraints are technological rollout speed, feedstock access, and enabling policy frameworks.

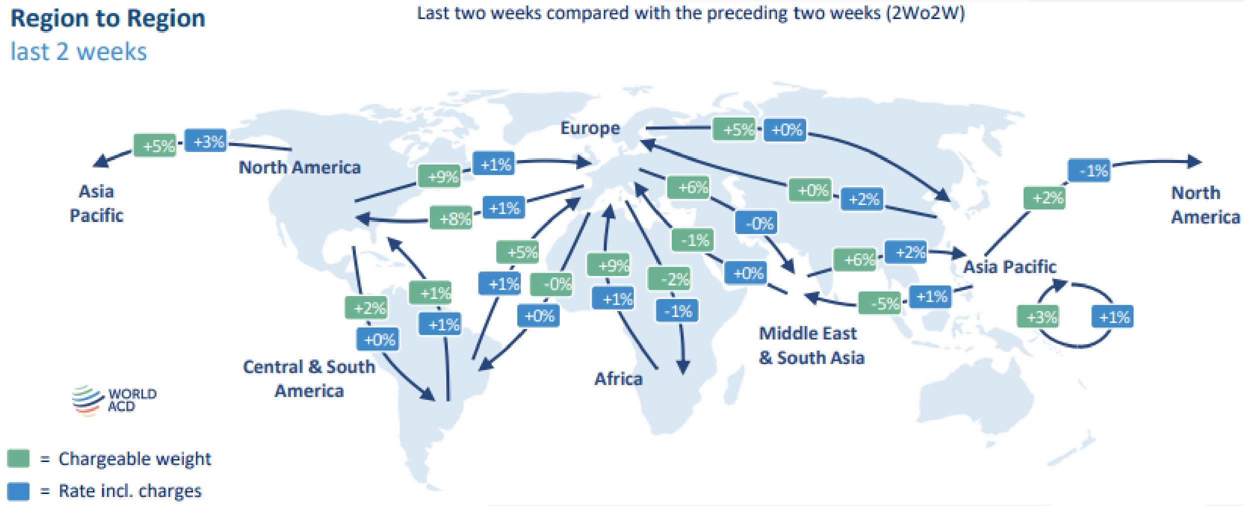
Figure 17 – Potential availability of global biomass feedstocks for SAF production by 2050



Source: IATA

According to high-frequency metrics from World ACD, global air cargo rates edged up slightly in mid-September, with worldwide averages at **$2,44/kg** (**↑1%**, w/w), thanks to increases from Africa (**↑3%**), among others. Demand held steady, but year-on-year deficits widened, especially in Asia Pacific–US lanes (**↓20%**), hit by new US tariffs and e-commerce curbs. Capacity remained stable, though disruptions from Europe's airport delays and East Asia's typhoon added volatility to an already fragile market. The following graph shows the developments across the last two weeks, with outbound cargo from Africa to Europe up by **↑9%**:

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



Source: World ACD

ENDS[19]

[19]**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.*