Authored by:
www.saaff.org.za

Distributed by:
www.busa.org.za

Cargo Movement Update #254[1]

Date: 5 October 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)	37 904	43 184	**81 088**	43 851	49 959	**93 810**	↓14%
Air Cargo (tons)	4 206	2 777	**6 983**	3 885	3 369	**7 254**	↓4%

Monthly Snapshot

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

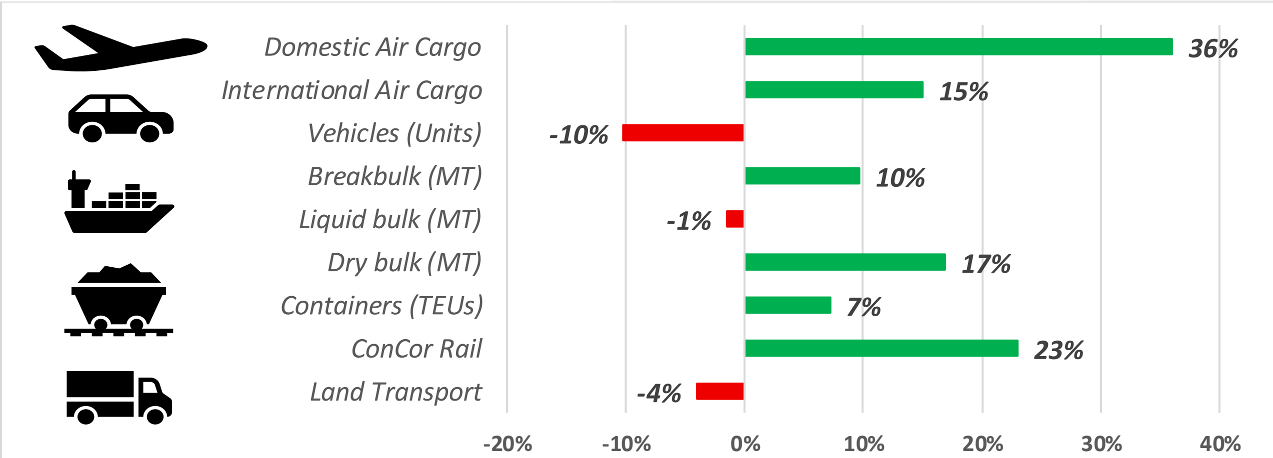
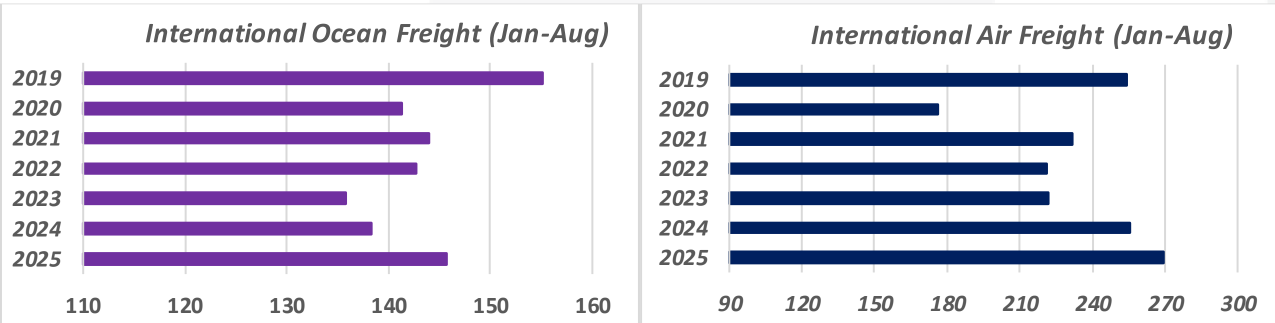


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~11 584 TEUs** was handled per day, with **~12 391 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 856** containers, down by **↓58%** from last week.
- Cross-border queue: **↓2,1 hrs**; transit: **↓1,8 hrs**; SA borders: **~11,1 hrs** (**↑18%**); SADC: **~5,0 hrs** (**↓32%**).
- Global carriers' margins fall below **↓10%** for the first time in 18 months, as intra-Asia trade expands.
- Global spot rates dropped by another **↓5,2%** (or **$92**) to **$1 669/40ft** and remain down by **↓52%** (y/y).
- Global air cargo demand (CTKs) rose **↑4,1%** (y/y) in August – with Africa leading at **↑11%**.

---

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *254th* 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 **11 584 TEUs** was handled daily, a notable decrease from **13 401 TEUs** the previous week.

Operational delays were characterised by inclement weather, vacant berths, as well as equipment breakdowns and shortages. Gushing winds, vacant berths, and equipment challenges disrupted port operations in Cape Town, as adverse weather, equipment breakdowns, and network challenges ensured operational delays in Durban. Strong winds and high swells prevented optimal performance at our Eastern Cape Ports, while inclement weather conditions presented operational difficulties at the Port of Richards Bay. The latest reports from TFR suggest that intermittent cable theft ensured operational delays on the ConCor line over the weekend, while trains are still moving slowly on the line between City Deep and Mafikeng due to locomotive issues. The latest Southern African Terminal Services Update from Maersk for Week 40 suggests that the largest South African terminals remain fluid with minimal waiting times. Additionally, the latest reports from Maersk indicate that the CMA CGM Nile will omit Port Louis due to the current delays and prolonged waiting times at the port.

Global ocean freight markets softened this week as carriers faced mounting overcapacity and declining spot rates. Drewry's **WCI** fell by more than **↓5%**, while the **Charter Index** also dipped. Industry analysts, warn of a structural overcapacity cycle peaking around **2027**, reminiscent of the 2016 downturn. Major carriers' profit margins have dropped below **↓10%** for the first time in 18 months, despite robust intra-Asia trade. Meanwhile, the **USTR's new port service fees** for vessels built in China – effective **14 October** – are prompting route adjustments, with COSCO facing up to **$1,5 billion annually** in added costs. Contract rates also eased, with shippers regaining leverage for **2026** negotiations.

International air cargo lifted to and from ORTIA slightly decreased again this week – mainly driven by the reduction in outbound cargoes after several weeks of high volumes. The daily average of air cargo handled amounted to **~601 000 kg** inbound (**↑8%**, w/w) and **~397 000 kg** outbound (**↓18%**). Despite the slight reduction, the current levels mean that cargo is still trending slightly above last year's level (**~↑2%**) and the comparative levels of pre-pandemic 2019 (**~↑5%**). The total monthly cargo for September increased by **↑1%** versus August, but was slightly below the year-on-year figure versus September last year (**↓1%**).

Internationally, air cargo remained resilient in Q3 2025, with tonnages up **↑4%** (y/y) despite softer rates (**↓3%**). Asia Pacific led growth, while Africa and MESA showed solid gains. Average prices steadied at **$2,43/kg**, though super-typhoon Ragasa briefly disrupted flows. Overall, demand held firm amid stable capacity and easing fuel costs.

Cargo movements along the N4 corridor decreased for road transport and also slightly decreased for rail transport. Truck volumes through the border post increased to around **1 422 HGVs per day** (**↓5%**, w/w). Queue times increased to an average of **~7,1 hours** (**↑29%**) at the border. The average processing time also increased to an average of **~7,1 hours** (**↑34%**) per crossing. The rail to Maputo decreased to an average of **nine trains daily** (down by **two** from last week). Sugar trains from Eswatini were stable at around **one train a day**.

Land border crossing times – on average – decreased significantly across the SADC region. Overall, the average queue time decreased by approximately **two hours** from last week, while transit time decreased by almost the same amount (around **two hours**). The median border crossing times at South African borders increased by approximately **an hour and a quarter**, averaging **~11,1 hrs** (**↑18%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased significantly, by more than **two hours**, averaging **~5,0 hrs** (**↓32%**). This week, on average, three SADC borders took around a day to cross, namely Beitbridge, Groblersbrug, and Kasumbalesa (the worst affected, taking nearly **two days** from the **Zambian side**). Other notable developments include **(1)** nationwide protest action in South Africa, **(2)** Groblersbrug delays, and **(3)** slow movements northbound through Beitbridge.

This week's report highlights persistent but improving conditions across South Africa's ports, corridors, and freight systems. Although container throughput dropped by **↓14%**, the longer-term trend remains elevated compared to the same time last year. Nevertheless, the ongoing operational delays that have plagued the industry persist, notably adverse weather, equipment shortages, and vacant berths. Three ongoing interventions – STS crane refurbishments, adverse weather training, and vessel arrival process optimisation – remain central to restoring reliability, along with the gains already achieved. At the strategic level, collaboration continues to yield gradual gains in terminal efficiency.

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 29 September to 5 October (measured in TEUs)

7-day flow reported (29/09/2025 – 05/10/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 547	31 830	↓5%
New Pier (Pier 1)	1 899	13 293	↓8%
Cape Town Container Terminal	2 348	16 436	↑49%
Ngqura Container Terminal	1 724	12 071	↓46%
Port Elizabeth Container Terminal	240	1 679	↓72%
Other	826	5 779	↓9%
Total	**11 584**	**81 088**	**↓14%**

Source: Calculated from TPT, 2025. Updated 05/10/2025.

A decreased average of **~11 584 TEUs** (**↓14%**) was handled per day for the last week (*29 September to 5 October, Table 2*). Throughput was below the projected average of **~12 287 TEUs** (**↓6%** actual versus projected).

For the coming week, an increased average of **~12 391 TEUs** (**↑7%**) is predicted to be handled (*26 to 12 October*, *Table 3*).

Operational delays were characterised by inclement weather, vacant berths, as well as equipment breakdowns and shortages.

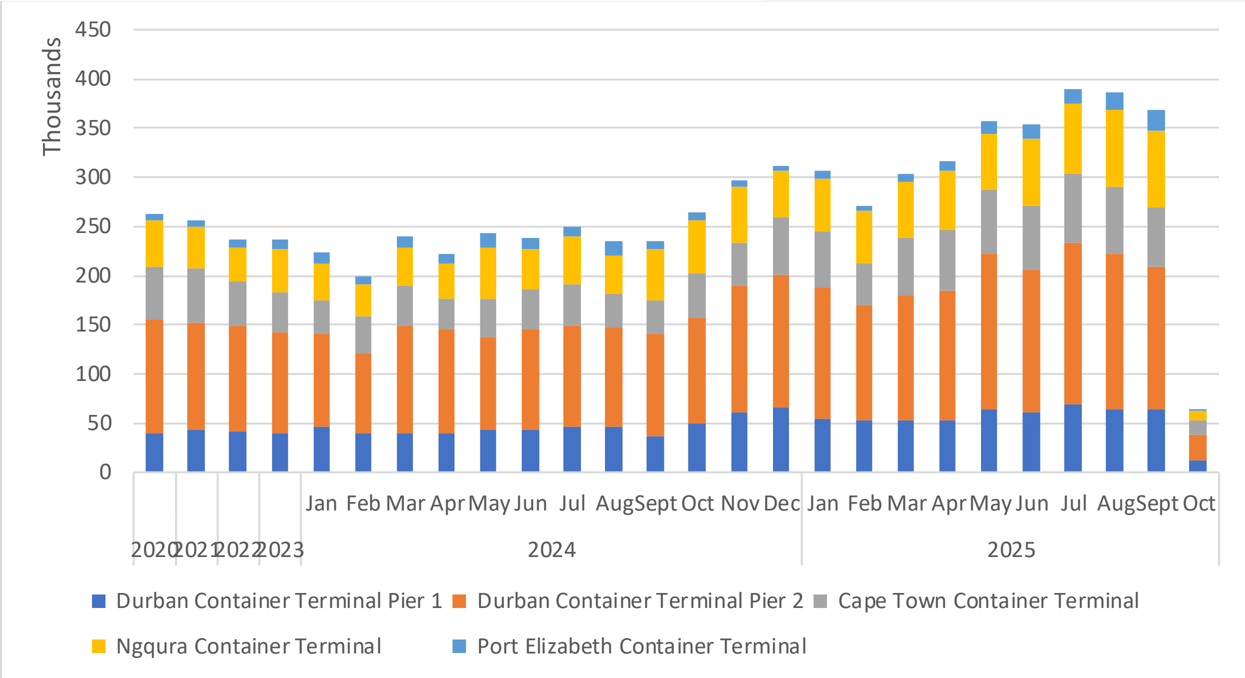
Table 3 – Container Ports – Weekly flow projected for 6 to 12 October (measured in TEUs)

7-day flow projected (06/10/2025 – 12/10/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 174	36 217	↑14%
New Pier (Pier 1)	1 983	13 883	↑4%
Cape Town Container Terminal	1 579	11 053	↓33%
Ngqura Container Terminal	2 294	16 061	↑33%
Port Elizabeth Container Terminal	424	2 966	↑77%
Other	937	6 560	↑14%
Total	**12 391**	**86 740**	**↑7%**

Source: Calculated from TPT, 2025. Updated 05/10/2025.

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 05/10/2025.

Figure 4 – Stack occupancy in DCT, general-purpose containers (6 September to present; day on the day)

Source: Calculated using data from Transnet, 2025, and updated 05/10/2025.

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 (9 September to present, day on day)

Source: Calculated using data from Transnet, 2025, and updated 05/10/2025.

b. Summary of port operations

i. Weather and other delays

- Gushing winds, vacant berths, and equipment challenges disrupted port operations in Cape Town.
- Adverse weather, equipment breakdowns, and network challenges ensured operational delays in Durban.
- Strong winds and high swells prevented optimal performance at our Eastern Cape Ports.
- Inclement weather conditions presented operational difficulties at the Port of Richards Bay.

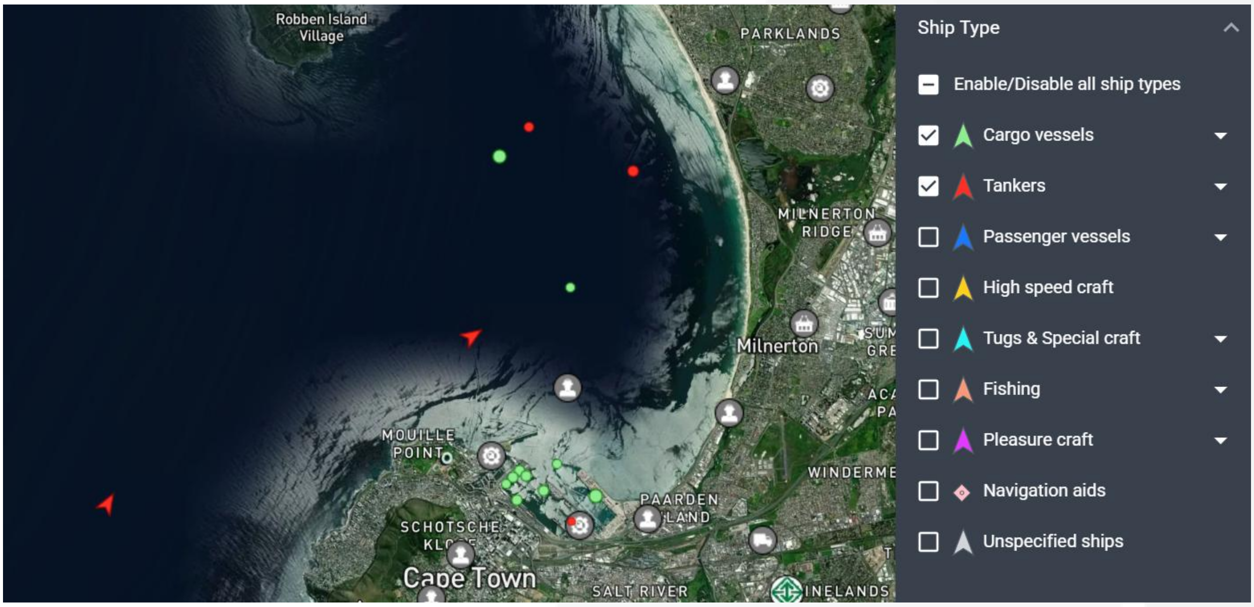
ii. Cape Town

On Thursday, CTCT recorded two vessels at berth and none at anchor, as adverse weather conditions, taking the form of strong winds, and 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 4 107 trucks while handling approximately 278 rail units. On the waterside, the terminal executed approximately 4 309 container moves across the quay during the same period. Additionally, this week, the terminal operated with **8-9 STS cranes**, **28-30 RTGs**, and approximately **59 hauliers**.

On Thursday, CTMPT had one berthed vessel, with zero vessels waiting at outer anchorage. During the previous 24-hour period, the terminal managed to handle 2 610 tons on the waterside, while servicing approximately 41 trucks on the landside. Stack occupancy figures were recorded at 2% for the general stack, 14% for reefers, and 0% for empties. For the majority of the week, the terminal operated with three cranes and between 2 and 3 straddle carriers.

Between 22 and 28 September, the FPT terminal handled five vessels: one multi-cargo, one dry bulk, and three container vessels. Berth occupancy during this period was recorded at 38%. The terminal planned to handle seven more vessels between 29 September and 5 October, with another eight vessels scheduled between 6 and 12 October. Equipment challenges, as well as the late arrival of transporters, resulted in operational delays during this period.

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



Source: Marine Traffic. Updated 05/10/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded one vessel on berth, with two vessels at anchor. Between Monday and Thursday, the terminal executed at least 3 665 gate moves and 248 rail moves on the landside. The **average TTT** for the week was **~56 minutes** (**↑27%**, w/w), as the **staging time** more than doubled - averaging **~80 minutes** (**↑111%**). Additionally, the terminal moved over 5 200 TEUs across the quay on the waterside during the same period. The terminal had between **three and four STS cranes** and around **16 RTGs** available for the most significant part of the week.

Pier 2 had four vessels on berth and four at anchorage on Thursday, as equipment breakdowns, adverse weather, and network challenges prevented optimal operational performance this week. The terminal operated with **10 to 12 gangs** and moved over **13 100** containers across the quay between Monday and Thursday on the waterside. Approximately **10 761** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~77 minutes** (**↓5%**, w/w) and an average **staging time** of **~91 minutes** (**↓7%**). Approximately 1 581 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **67** and **69** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **63%** during this period.

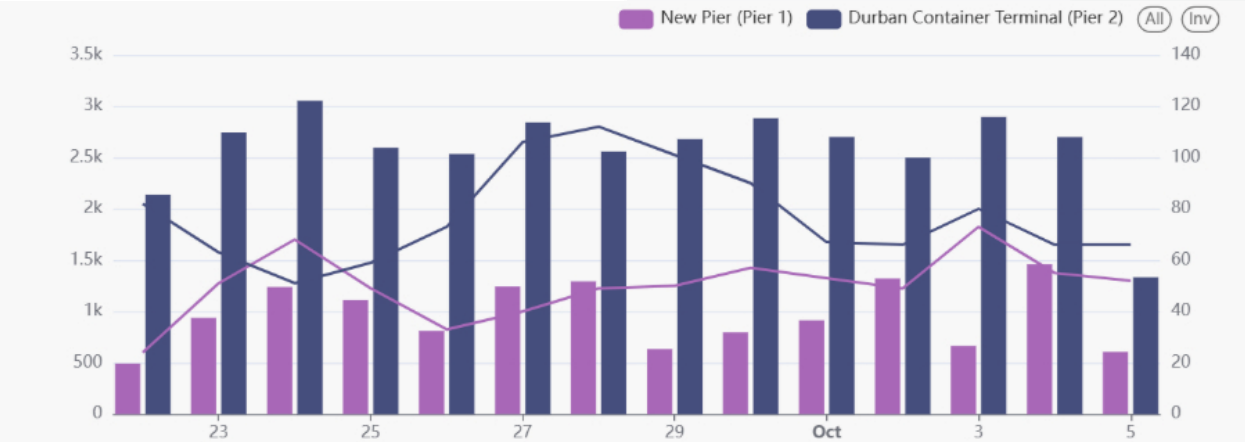
Durban's MPT terminal recorded one vessel at berth on Thursday and one at outer anchorage. Stack occupancy for containers was recorded at 48% and the breakbulk stack at 5%. In the preceding 24 hours, 257 containers but zero tons of breakbulk were handled on the waterside. On the landside, 412 container trucks were serviced at a TTT of ~74 minutes. Additionally, ten breakbulk trucks were serviced, containing approximately 93 tons. During this period, two cranes, eight reach stackers, seven forklifts, and 20 ERFs were in operation. The third crane remained out of commission for the most significant part of the week but is anticipated to return to service before the weekend. Additionally, the fourth crane is still on track to return to service around 22 December.

Between Wednesday and Thursday, the Maydon Wharf MPT recorded one vessel at berth and zero at anchorage. On the waterside, the terminal managed to handle around 5 215 tons, while 19 trucks and 16 rail wagons 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 7 270 tons, with no volumes being handled on the landside.

On Wednesday, the Ro-Ro terminal in Durban had one vessel on the berth, with zero at anchorage. In the preceding 24 hours, the terminal handled 209 road units and 545 units on rail on the landside, while 778 units were handled on the waterside. Overall stack occupancy was 45%, with 10% recorded at Q+R and 60% at G-berth. Earlier this week, the terminal had 144 abnormal loads and managed to handle 23.

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.

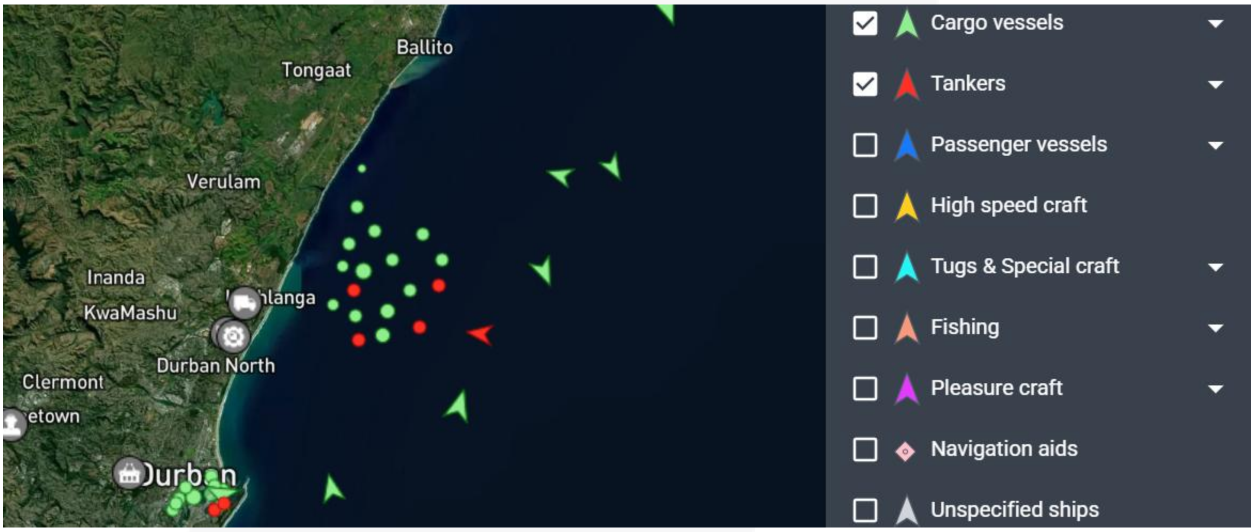
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 05/10/2025.

The queue of container vessels waiting outside Durban has decreased slightly this week, again at DCT Pier 2. On Monday evening (6 October), **one** container vessel was waiting outside at anchorage for Pier 1, **two** for Pier 2, and **three** for Point. The queue of dry (**two**), liquid (**two**), and breakbulk (**one**) vessels has also decreased slightly from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 05/10/2025 at 14:00.

iv. Richards Bay

On Thursday, the Port of Richards Bay had five vessels at anchor and six on the berth, translating to two vessels at DBT, zero at MPT, four at RBCT, and zero 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 **157 000 tons** (**↓10%**, w/w) a day. An average of **23 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 two vessels on berth and none at anchor, with two 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 22% for reefers and 24% for the general stack. There were instances this week where the berths were not fully occupied, which negatively impacted operational performance at the terminal. Moreover, despite experiencing adverse weather for around 20 hours during this period, the terminal handled approximately 532 TEUs and two reefers on the waterside. Approximately 83 trucks were processed on the landside at a TTT of ~32 minutes. For the most significant part of the week, the terminal had between 7-8 STS cranes, between 23-25 RTGs, and around 48-55 hauliers in service.

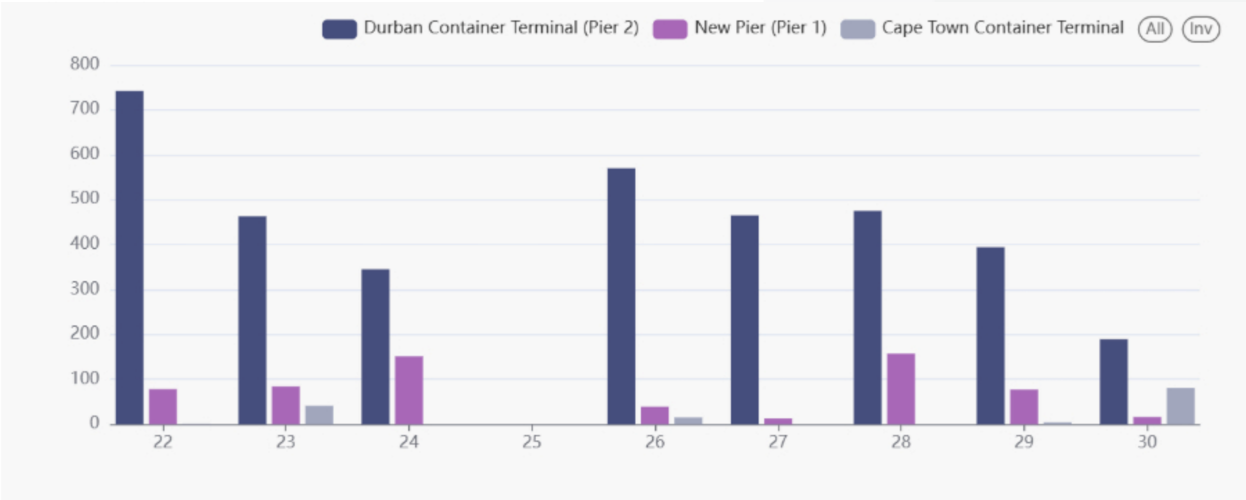
On Thursday, GCT had zero vessels at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 59 trucks were processed at a TTT of ~13 minutes on the landside, while zero TEUs were handled across the quay on the waterside due to strong winds and high swells, as well as no vessels being on berth. Stack occupancy was recorded at 11% for the general stack and 18% for reefers. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and nine straddles in service.

On Wednesday, the Ro-Ro terminal recorded no vessels at berth or at outer anchorage. However, in the previous 24 hours, the terminal completed berthing the vessel by handling the remaining 350 units. This ultimately resulted in a stack occupancy of 29%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that intermittent cable theft ensured operational delays on the ConCor line over the weekend, while trains are still moving slowly on the line between City Deep and Mafikeng due to locomotive issues. Towards the end of the week, DCT Pier 2 had 130 ConCor units on hand with a dwell time of 72 hours and 409 over-border units with a dwell time of 73 days.

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



Source: Calculated using data from Transnet, 2024. Updated 05/10/2025.

In the last week (*29 September to 5 October*), rail cargo on the ConCor line out of Durban was reported at **2 856** containers, down by **↓58%** from the previous week's **3 884** containers.

vii. General

The latest Southern African Terminal Services Update from Maersk for Week 40 suggests that the largest South African terminals remain fluid with minimal waiting times. CTCT recorded 0-2 days' waiting time due to intermittent wind gusts earlier this week. No waiting times were recorded at either CTMPT or NCT. PECT currently has a waiting time of around two days, while DCT Pier 2 has a waiting time of 0-1 day and Pier 1 has a waiting time of 2-3 days.

Additionally, the latest reports from Maersk suggest that the CMA CGM Nile will omit Port Louis due to the current delays and prolonged waiting times at the port.

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 (*29 September to 5 October*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *October 2024* averaged **~974 000 kg**.

Table 4 – International inbound and outbound cargo from OR Tambo

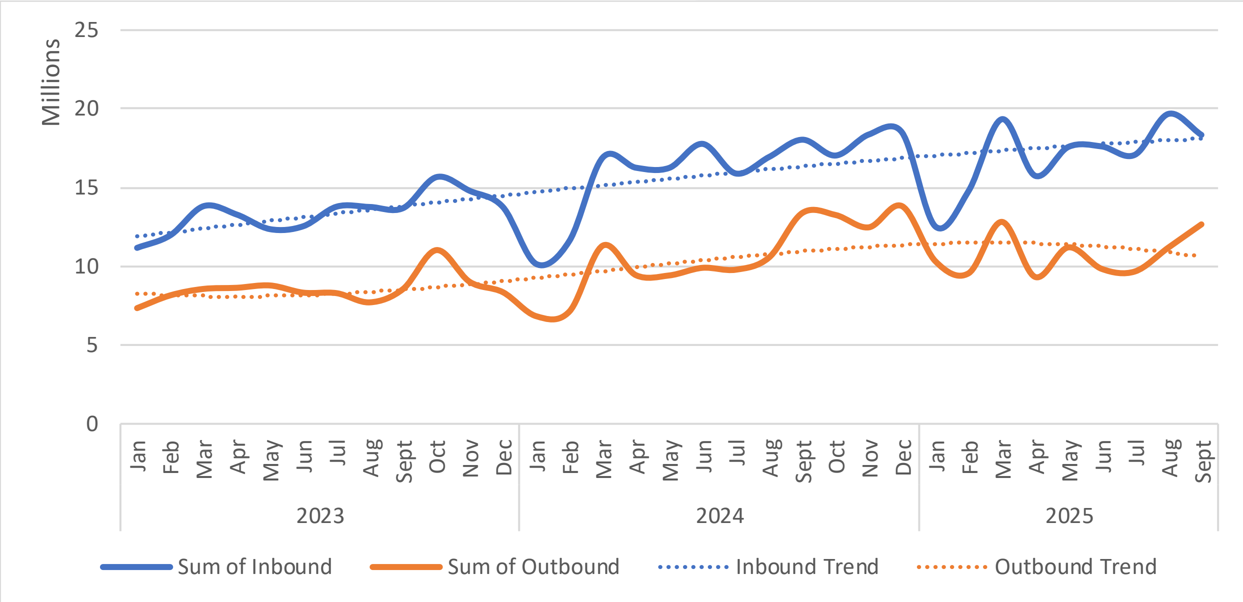
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	**600 874**	**4 206 116**	**↑8%**
Volume outbound	**396 707**	**2 776 950**	**↓18%**
Total	**997 581**	**6 983 066**	**↓4%**

Courtesy of ACOC. Updated: 05/10/2025.

International air cargo lifted to and from ORTIA slightly decreased again this week – mainly driven by the reduction in outbound cargoes after several weeks of high volumes. The daily average of air cargo handled amounted to **~601 000 kg** inbound (**↑8%**, w/w) and **~397 000 kg** outbound (**↓18%**). Despite the slight reduction, the current levels mean that cargo is still trending slightly above last year's level (**~↑2%**) and the comparative levels of pre-pandemic 2019 (**~↑5%**). The total monthly cargo for September increased by **↑1%** versus August, but was slightly below the year-on-year figure versus September last year (**↓1%**).

The following figure shows the international air cargo flows to and from OR Tambo since the start of 2023, with the sustained increase for outbound cargo evident of late:

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

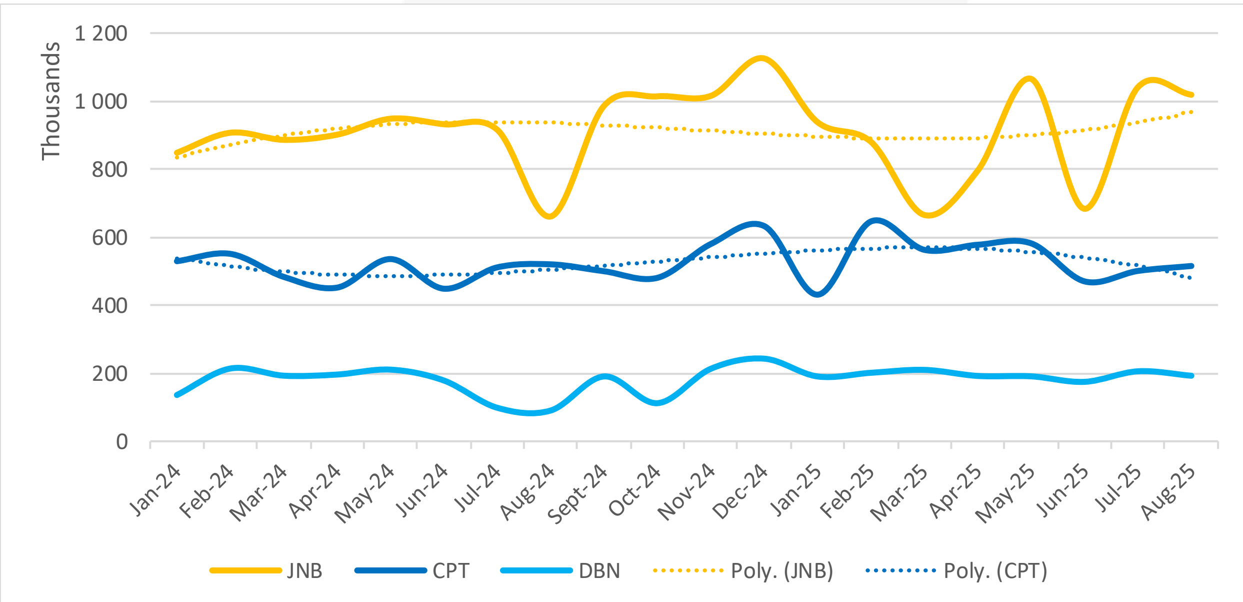


Calculated from ACOC. Updated: 05/10/2025.

b. 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: 05/10/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*29 September to 5 October)*, movements along the N4 corridor decreased for road transport and also slightly decreased for rail transport.

- Truck volumes through the border post increased to around **1 422 HGVs per day** (**↓5%**, w/w).
- Queue times increased to an average of **~7,1 hours** (**↑29%**) at the border.
- The average processing time also increased to an average of **~7,1 hours** (**↑34%**) per crossing.
- The rail to Maputo decreased to an average of **nine trains daily** (down 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:

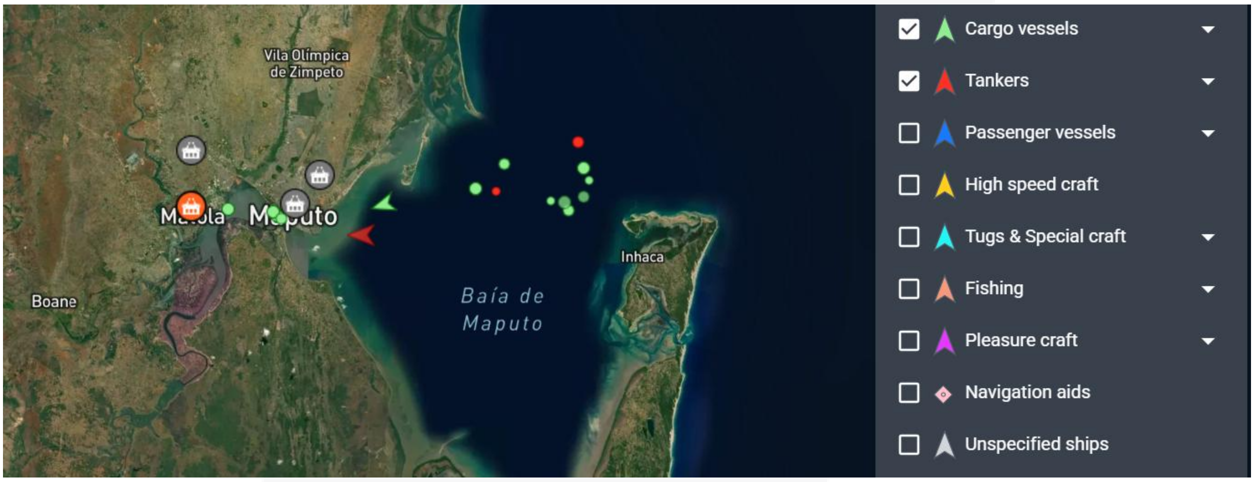
Table 5 – Lebombo border post update

	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	**1422**	**1385**	**1025**	**239**	**39**	**89**	**39**	**282**	**9**	**8**	**1**	**1**
% (w/w)	**-5%**	**-4%**	**-9%**	**12%**	**8%**	**3%**	**22%**	**-3%**	**-15%**	**-18%**	**-88%**	**-25%**
% 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 05/10/2025.

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 05/10/2025 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 decreased by approximately **two hours** from last week, while transit time decreased by almost the same amount (around **two hours**).

- The median border crossing times at South African borders increased by approximately **an hour and a quarter**, averaging **~11,1 hrs** (**↑18%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased significantly – by more than **two hours**, averaging **~5,0 hrs** (**↓32%**).

1. **Protest action**:
   a. COSATU has been granted permission for protest action on Tuesday, 7 October, from 00:00 to 23:59.
   b. Typically, such protests have not caused significant disruption, but stakeholders are advised to take precautions.
2. **Groblersbrug**:
   a. Persistent delays were reported, with some vehicles waiting more than a day in the Dangerous Goods Truck Park before being cleared to cross.
3. **Beitbridge**:
   a. Northbound traffic experienced slow movement this morning, with agents and runners delayed in clearing vehicles.
   b. Truck queues extended back onto the bridge earlier in the day.

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

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

Border Post	Direction	HGV[8] 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	450	29,3	5,3	29,0	13 500	3 150
Beitbridge	Zimbabwe-SA	459	12,7	2,0	12,4	13 770	3 213
Groblersbrug	SA-Botswana	241	25,7	2,5	26,0	7 230	1 687
Martin's Drift	Botswana-SA	206	2,2	0,3	2,1	6 180	1 442
Kopfontein	SA-Botswana	197	11,3	2,2	11,2	5 910	1 379
Tlokweng	Botswana-SA	19	0,6	0,2	0,4	570	133
Vioolsdrift	SA-Namibia	30	4,2	1,4	4,1	900	210
Noordoewer	Namibia-SA	20	2,4	0,3	2,2	600	140
Nakop	SA-Namibia	30	2,7	0,4	2,6	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,3	1,1	600	140
Skilpadshek	SA-Botswana	293	6,8	1,5	6,5	8 790	2 051
Pioneer Gate	Botswana-SA	67	0,0	0,0	0,0	2 010	469
Ramatlhabama	SA-Botswana	167	2,9	0,3	2,5	930	217
Ramatlhabama	Botswana-SA	31	0,4	0,1	0,2	5 010	1 169
Lebombo	SA-Mozambique	1 489	7,1	2,4	7,1	44 670	10 423
Ressano Garcia	Mozambique-SA	1 415	1,5	0,3	1,3	42 450	9 905
Sum/Average		**5 134**	**6,9**	**1,2**	**6,8**	**154 020**	**35 938**

Source: TLC, FESARTA, & Crickmay, week ending 28/09/2025.

[6] 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.
[7] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[8] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

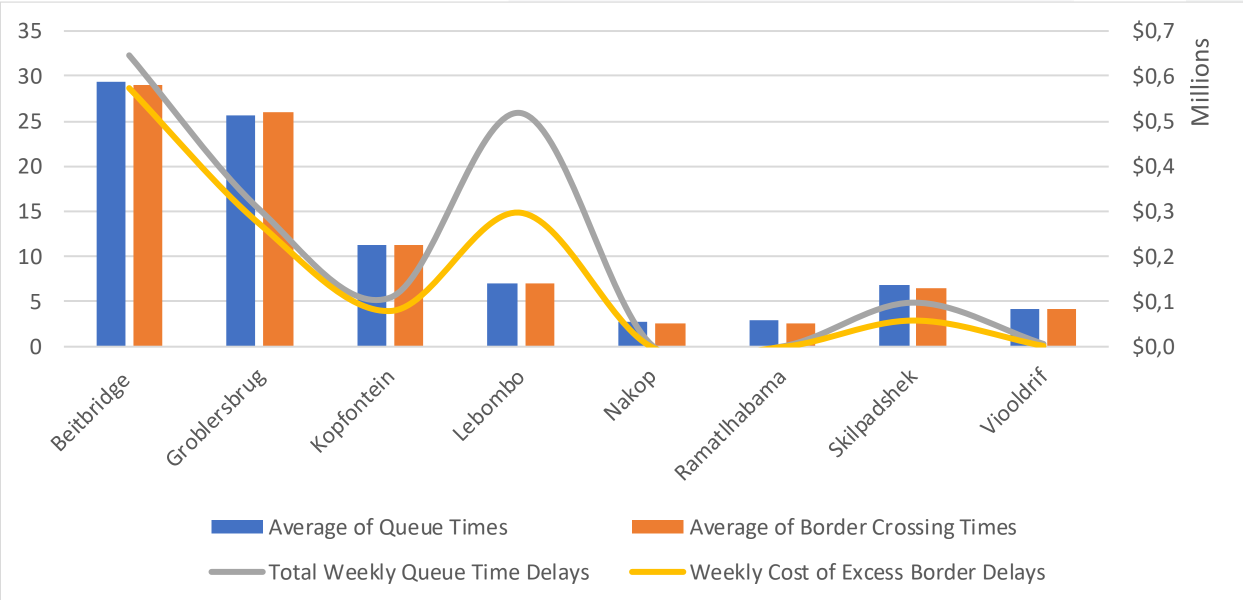
Table 7 – Delays summary – Corridor perspective

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	12,4	3,3	12,6	9 600	2 240
Central Corridor	798	2,5	0,2	2,4	23 940	5 586
Dar Es Salaam Corridor	1 819	11,3	1,2	11,3	54 570	12 733
Maputo Corridor	2 904	4,3	1,3	4,2	87 120	20 328
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 313	14,2	1,7	11,9	99 390	23 191
Northern Corridor	2 817	1,8	0,5	1,7	92 520	21 588
Trans Caprivi Corridor	804	3,2	0,6	3,0	24 120	5 628
Trans Cunene Corridor	100	2,6	0,6	2,5	3 000	700
Trans Kalahari Corridor	116	13,5	1,1	13,3	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	**13 218**	**6,3**	**0,9**	**5,7**	**404 550**	**94 395**

Source: TLC, FESARTA, & Crickmay, week ending 28/09/2025.

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

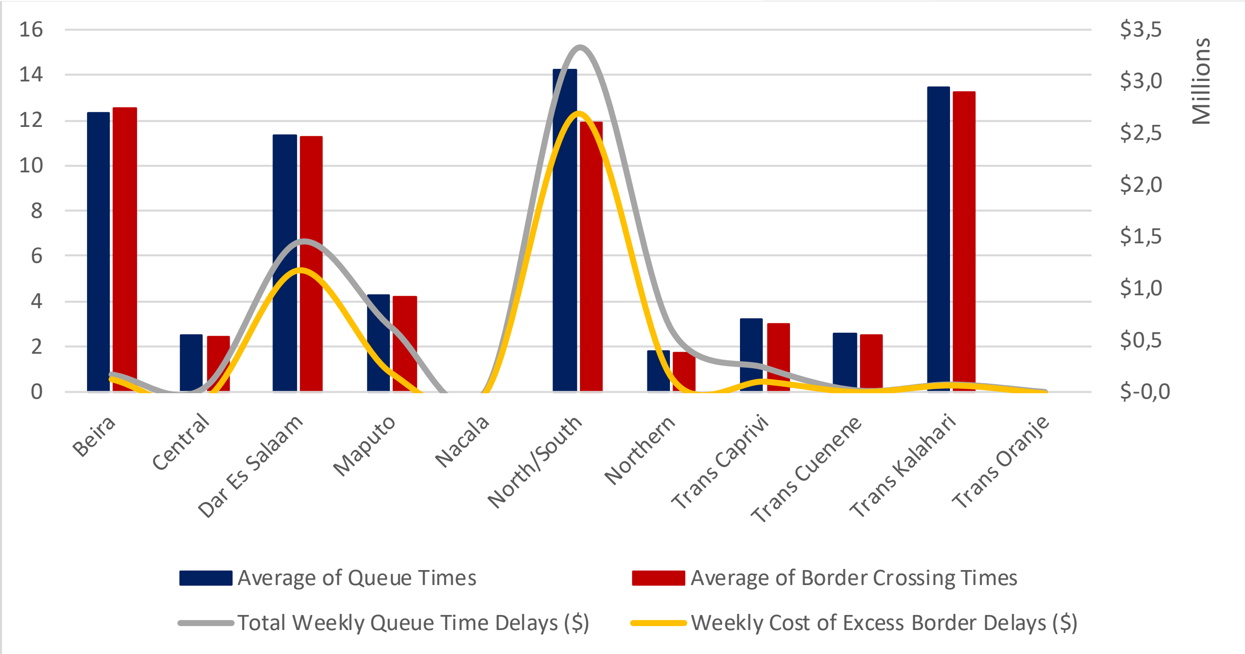
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 28/09/2025.

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 28/09/2025.

In summary, cross-border queue time averaged **~6,3 hours** (down by **~2,1 hours** from the previous week's **~8,4 hours**), indirectly costing the transport industry an estimated **$6,5 million** (**R113 million**). Furthermore, the week's average cross-border transit times also hovered around **~5,7 hours** (down by **~1,8 hours** from the **~7,5 hours** recorded in the previous report), at an indirect cost to the transport industry of **$4,4 million** (**R75 million**). As a result, the total indirect cost for the week amounts to an estimated **~$10,9 million** (**R188 million**, down by **↓18%** from the **~R40 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.

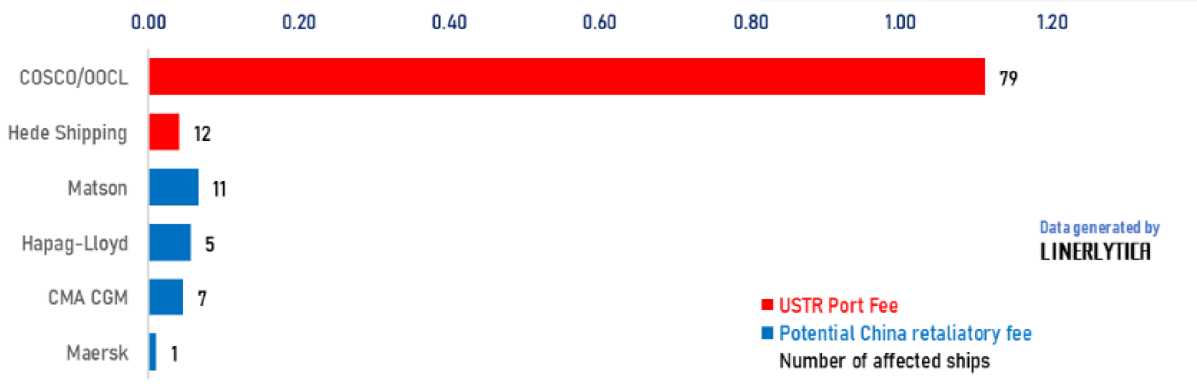
a. Global shipping industry

i. USTR port fees

With the USTR's new port service fees for vessels built in China coming into effect on 14 October, carriers are adjusting deployments to avoid penalties; Chinese operators, especially COSCO and Hede, are particularly exposed, while retaliatory Chinese measures may have limited effect. COSCO could find itself the most significantly impacted, facing up to **$1,5 billion annually** in port call fees:[9]

[9] Whiteman, A. 06/10/2025. Pay USTR port fees in advance to be shut out, US tells carrier.

Figure 15 – Estimated annual port fee by operator at $50/NT (capped at five voyages per ship) in $ billions



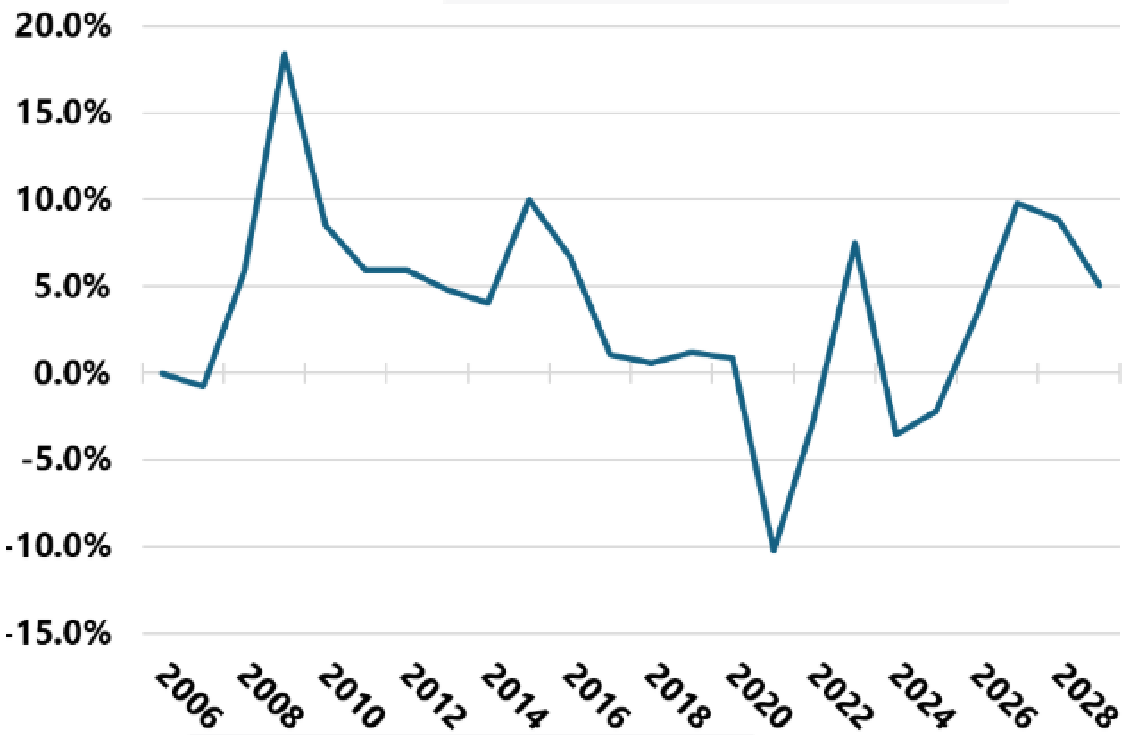
Source: [Linerlytica]

In an update, the US Customs and Border Protection made clear that the burden for determining if a vessel owes the fee is on the operator, not the CBP.

ii. Global industry summary

Sea-Intelligence projects that the container shipping industry is entering a structural cycle of overcapacity, peaking around 2027 at levels comparable to the 2016 price war era. They built this forecast by adjusting nominal fleet growth for vessel ageing/slowdowns, port congestion, the Red Sea disruption, and scrapping, and comparing against demand growth tied to global GDP. Key risks to this trajectory include the duration of the Red Sea crisis, the volume of new vessel orders, and potential downside to demand from geopolitical or trade shocks.

Figure 16 – Excess capacity projection (corrected for vessel slowdown, congestion, Red Sea Crisis, and scrapping)



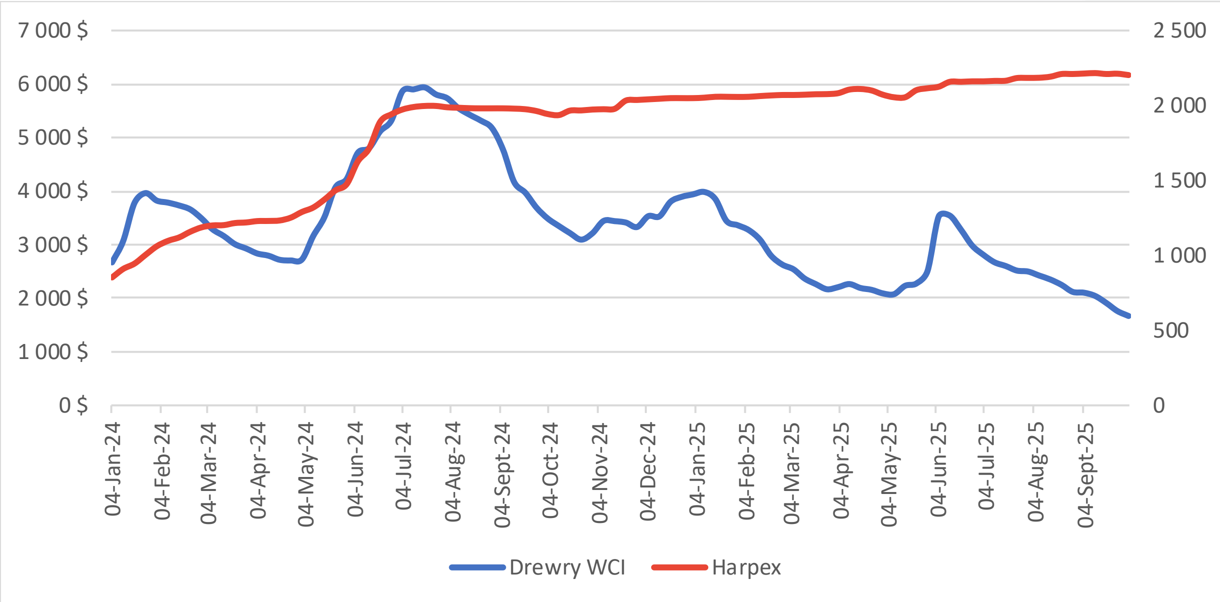
Source: [Drewry]

Elsewhere, carriers' margins fall below **↓10%** for the first time in 18 months, as intra-Asia trade expands, with Maersk, Hapag-Lloyd, and PIL leading the charge. Far East–Europe rates tumble despite vessel shortages, and Bangkokmax vessels rise as the new regional standard, driving strong charter demand.[10]

iii. Global freight rates

The global container market is seeing continued pressure on spot rates, as Drewry's "*World Container Index*" dropped by **↓5,2%** (or **$92**) to **$1 669 per 40-ft container** this week.[11] Carriers are responding to weakening demand by trimming sailings and scaling back capacity ahead of seasonal downticks. Drewry expects the supply–demand balance to soften further over the coming quarters, putting continued downward pressure on freight rates. For charter rates, the *Harper Petersen Index* (Harpex) is trading around **2 203 points** on Friday (**↓0,4%**, w/w).[12]

Figure 17 – World Container Index (WCI) and Charter Rate Index (Harpex)



Source: Drewry

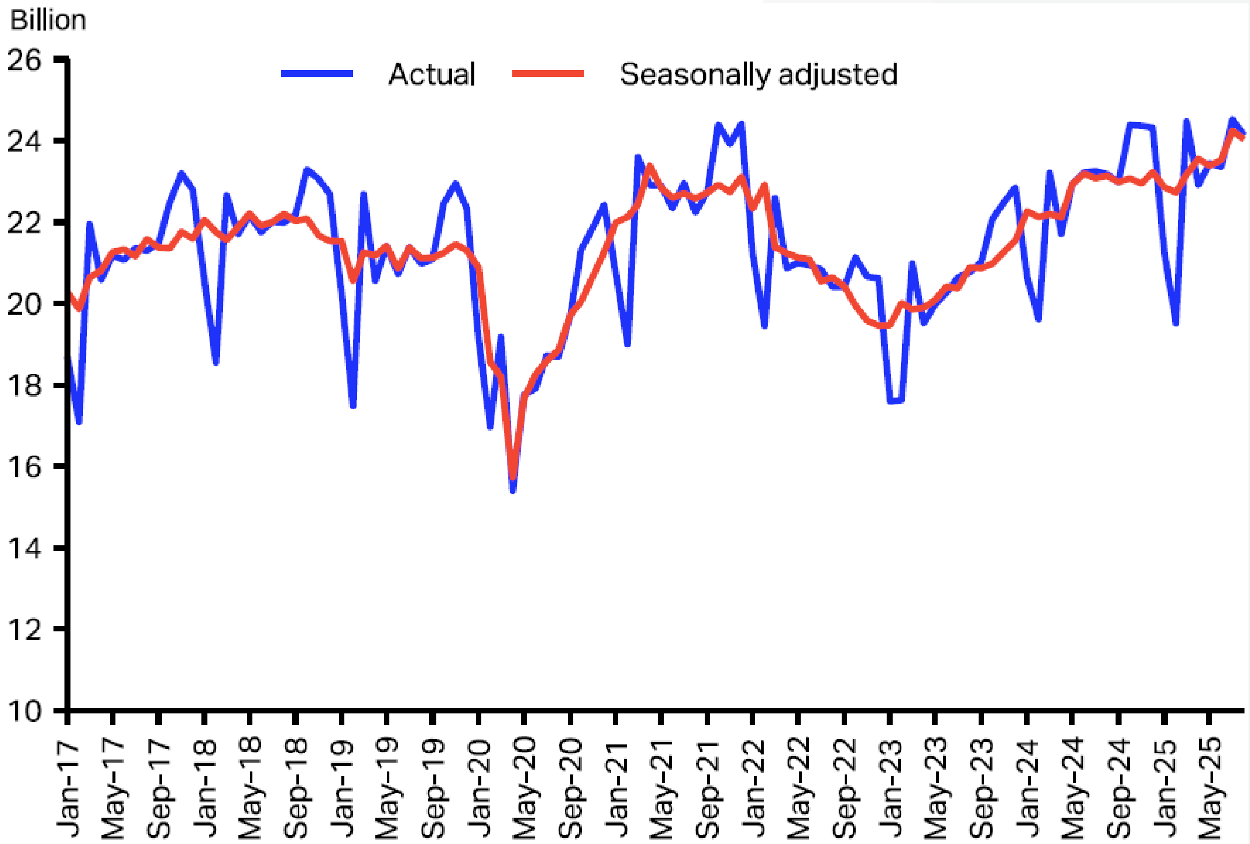
In contract markets, the Drewry "*East-West Contract Rate*" Index declined about **↓3%** year-on-year through September, marking the first annual contraction since mid-2024 and signalling a reversal of upward contract rate momentum. As shippers gain negotiating leverage, Drewry anticipates that 2026 contracts will be awarded at significantly lower rates and more favourable terms (e.g. stricter surcharge clauses, improved service commitments).[13]

b. Global air cargo industry

The latest IATA "*Air Cargo Market Analysis*" for August showed that global air cargo demand (CTKs) rose **↑4,1%** (y/y), maintaining resilience despite a slowdown from July's **↑5,5%**. International CTKs increased **↑5,1%**, with Africa leading at **↑11%** – its second consecutive month of double-digit growth, driven by strong Africa–Asia and Africa–Middle East routes.

[10] Alphaliner. 07/10/2025. Container Shipping News Recap of September: Margins Tighten, Rates Drop, and Regional Trades Surge.
[11] Drewry. 02/10/2025. World Container Index.
[12] Harpex. 03/10/2025. Harper Petersen Index.
[13] Drewry. 07/10/2025. Shippers in the driving seat to secure better 2026 ocean contracts after reversal of trend.

Figure 18 – Industry CTK, billion



Source: IATA

Global capacity (ACTKs) grew ↑**3,7%**, while cargo load factors improved slightly to **44,2%**. Jet fuel prices fell ↓**6,4%** (y/y) to **$87,6** per barrel, marking fourteen months of decline, although the crack spread widened **52%** (y/y). Freighter activity rose modestly (↑**2,6%**), with belly-hold capacity expanding faster (↑**7,8%**), now carrying **56,6%** of freight. Overall, yields softened ↑**2%** (y/y) amid ample capacity and shifting trade flows, but Africa and Asia-Pacific remained the top performers in global air cargo markets.

According to high-frequency metrics from World ACD, global air cargo tonnages grew ↑**4%** (y/y) in Q3 2025, maintaining steady quarterly gains amid softer pricing.

Figure 19 – 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		+0%	+9%		+0%	-0%		+2%	+5%
Asia Pacific		-2%	+2%		-1%	+5%		+1%	-7%
C. & S. America		-0%	+5%		+1%	+2%		+1%	-1%
Europe		-1%	+3%		+4%	0%		+1%	+1%
M. East & S. Asia		+0%	+3%		+5%	+0%		+1%	-22%
North America		+0%	-2%		+6%	+1%		+3%	-2%
Worldwide		-1%	+1%		+2%	+2%		+0%	-6%

Source: World ACD

Asia Pacific led regional expansion (**↑7%**, y/y; **↑4%**, q/q), with strong intra-Asia flows (**↑10%**). The Middle East and South Asia also advanced (**↑9%**, q/q). Average worldwide rates were stable at **$2,43/kg**, about **↑6%** below September 2024 levels. The final week of September saw a **↓2%** decline in volumes, primarily due to disruptions from super-typhoon Ragasa in East Asia. High-frequency data show steady global tonnage (**↑1%**) but slightly falling rates (**↓1%**), with Africa (**↑9%**) and Asia Pacific (**↑2%**) outperforming.

ENDS[14]

[14]**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.*