

Cargo Movement Update #255¹

Date: 12 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)	46 818	53 339	100 157	37 904	43 184	81 088	↑24%
Air Cargo (tons)	4 410	3 087	7 496	4 206	2 777	6 983	↑7%

Monthly Snapshot

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

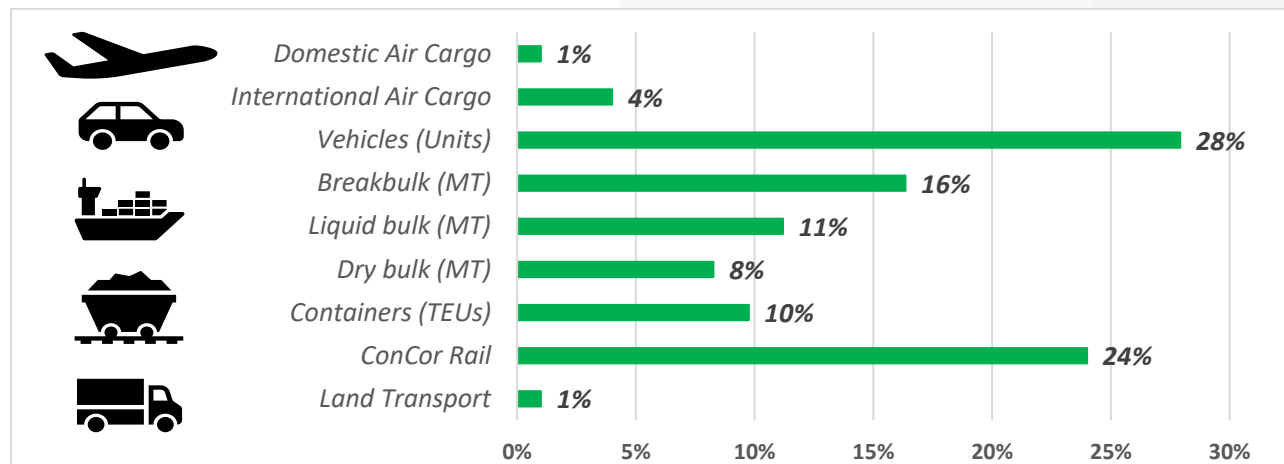
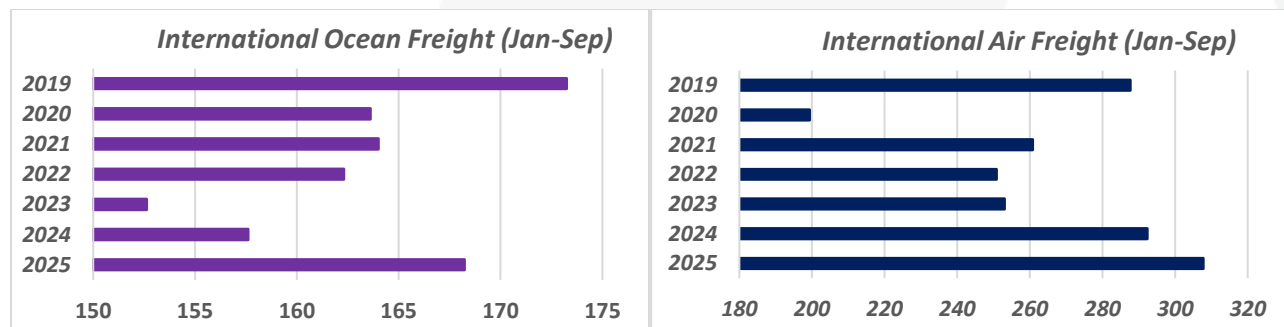


Figure 2 – Year-to-date flows 2019-2025⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~14 308 TEUs was handled per day, with ~12 391 TEUs projected for next week.
- TNPA Sept.: containers are up by ↑18% (m/m) and by ↑10% (y/y). Total bulk: ↑26% (m/m) & ↑17% (y/y).
- Rail cargo handled out of Durban was reported at 3 744 containers, up by ↑31% from last week.
- Cross-border queue: ↑1,2 hrs; transit: ↑1,6 hrs; SA borders: ~10,7 hrs (↓4%); SADC: ~6,9 hrs (↑38%).
- Global container throughput reached record levels in August, and is up by ↑0,8% (m/m) & ↑2,8% (y/y).
- Global air cargo chargeable weight rose ↑1% (2w/2w). Rates climbed ↑3% (w/w) to \$2,51/kg.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 255th 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: Sept. vs Sept.

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 **14 308 TEUs** was handled daily, a notable increase from **11 584 TEUs** the previous week.

Despite excellent throughput, some operational delays persisted and were characterised by inclement weather, a few instances of vacant berths, as well as equipment breakdowns and shortages. Equipment challenges, accompanied by vacant berths, proved to be the primary operational constraints in Cape Town, as adverse weather conditions and equipment breakdowns ensured operational disruptions in Durban. Strong winds and vacant berths characterised operations at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. The latest reports from TFR suggest that locomotive challenges are still creating bottlenecks on the line between City Deep and Mafikeng, while the ConCor line was closed on Monday due to monthly maintenance on the line. The latest Ocean freight update from Maersk indicates that Port performance across West Africa currently shows steady improvement, while on the Customs front, the de minimis duty-free threshold of \$800 expired on August 29, and Section 232 tariffs on steel and aluminium remain high.

Global trade momentum remains broadly positive, with the IMF projecting world output to expand by **3,2% in 2025** before easing slightly in 2026, reflecting improved financial conditions and the fading of tariff shocks. Containerised trade reached **record throughput levels in August**, up **↑0,8%** (m/m) and **↑2,8%** (y/y), driven by strong Indian Sub-Continent and Middle East imports. Sub-Saharan Africa's volumes rose by **↑1,4%** (imports) and **↑0,1%** (exports), with South Africa maintaining around **24%** of regional imports and **53%** of exports. However, the global shipping industry faces **mounting service instability**, volatile freight rates, and cost pressures from China's new port fees and tightening environmental regimes. Overall, the sector exhibits cyclical recovery amid structural fragility, dependent on carriers' operational discipline for sustained profitability.

Air cargo volumes strengthened across all major airports in September, with Johannesburg, Cape Town, and Durban recording monthly gains of **↑1%**, **↑9%**, and **↑27%**, respectively. Year-on-year growth was mixed, but overall year-to-date volumes remain approximately **~↑5,3%** higher than in 2024. For the week, international air cargo lifted to and from ORTIA increased substantially this week – mainly driven by the increased outbound flows, offsetting the lull of last week. The daily average of air cargo handled amounted to **~630 000 kg** inbound (**↑5%**, w/w) and **~441 000 kg** outbound (**↑11%**). Consequently, the current levels mean that cargo is trending significantly above last year's level (**~↑10%**) and the comparative levels of pre-pandemic 2019 (**~↑13%**).

Domestic air cargo volumes were broadly stable in September, with marginal month-on-month changes and a modest improvement compared to last year. Cape Town and Durban each recorded **↑7%** monthly and **↑11%** and **↑8%** annual increases, while Johannesburg dipped slightly by **↓3%** month-on-month but remained in line with 2024 levels.

This week's air cargo operational focus highlighted persistent BMA resourcing constraints affecting Port Health and after-hours inspections, alongside renewed attention to aviation fuel supply vulnerabilities, following stakeholder engagement at Cape Town International Airport to safeguard continuity of operations.

Global air cargo demand recovered modestly in early October, driven by Asia Pacific markets rebounding from typhoon disruptions, with worldwide tonnage up **↑3%** (y/y) and capacity broadly stable. However, rates rose **↑3%** week-on-week to **\$2,51/kg** but remained **↓4%** below 2024 levels, suggesting more

substantial volumes but continued yield pressure across major trade lanes. Elsewhere in the industry, fears of a traditional fourth quarter lift, which might not materialise, are evident.

Cargo movements along the N4 corridor decreased slightly for road transport and increased somewhat for rail transport. Truck volumes through the border post decreased to around **1 394 HGVs per day** (↓2%, w/w). Queue times decreased to an average of **~6,9 hours** (↓3%) at the border. The average processing time decreased to an average of **~6,5 hours** (↓8%) per crossing. The rail to Maputo increased to an average of **ten trains daily** (up by **one** from last week). Sugar trains from Eswatini were stable at around **one train a day**.

Land border crossing times – on average – increased across the SADC region, especially on several high-traffic routes. Overall, the average queue time increased by approximately **an hour** from last week, while transit time also increased by around **an hour and a half**. The median border crossing times at South African borders decreased by approximately **half an hour**, averaging **~10,7 hrs** (↓4%) for the week. In contrast, the greater SADC region (excluding South African-controlled) increased significantly, by almost **two hours**, averaging **~6,9 hrs** (↑38%). This week, on average, two SADC borders took around a day to cross, namely Beitbridge and Kasumbalesa (the worst affected, taking nearly **three days** from the **Zambian side**). Other notable developments include **(1)** SARS network outages, **(2)** operational disruption in South Africa, and **(3)** Zimbabwe ZEP permit extension.

Overall, South Africa's ports are showing sustained recovery and renewed momentum. And not only in the port environment – it is indeed the first time ever that all figures reported in *Table 1* and *Figure 1* are in the green! Container throughput rose by **↑18%** month-on-month and **↑10%** year-on-year, while bulk cargo volumes expanded by **↑26%** and vehicle throughput surged by **↑57%** compared with September 2024 – a post-pandemic (bulk) and overall (vehicles) record across categories. Year-to-date bulk cargo levels are up by **↑6,7%** – and containers are up by **↑2,4%**, both nearly back to 2019 levels, underscoring that the rebound is broad-based and durable. These gains reflect deliberate interventions: the **(1)** rollout of new equipment, **(2)** better alignment between hinterland, terminal, and waterside operations, and **(3)** stronger collaboration across the logistics chain. Together, these developments mark a decisive shift toward restored reliability, improved competitiveness, and a re-energised national logistics network.

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1. Ports Update

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

a. Container flow overview

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

Table 2 – Container Ports – Weekly flow reported for 6 to 12 October (measured in TEUs)

7-day flow reported (06/10/2025 – 12/10/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 770	40 390	↑27%
New Pier (Pier 1)	2 685	18 794	↑41%
Cape Town Container Terminal	2 089	14 620	↓11%
Ngqura Container Terminal	2 289	16 023	↑33%
Port Elizabeth Container Terminal	550	3 848	↑129%
Other	926	6 482	↑12%
Total	14 308	100 157	↑24%

Source: Calculated from TPT, 2025. Updated 12/10/2025.

An increased average of ~**14 308 TEUs (↑24%)** was handled per day for the last week (6 to 12 October, Table 2). Throughput was significantly above the projected average of ~**12 391 TEUs (↑15%** actual versus projected).

For the coming week, a decreased average of ~**12 391 TEUs (↓13%)** is predicted to be handled (13 to 19 October, Table 3).

Despite another exemplary week, some operational delays persisted, including inclement weather, vacant berths, as well as equipment breakdowns and shortages.

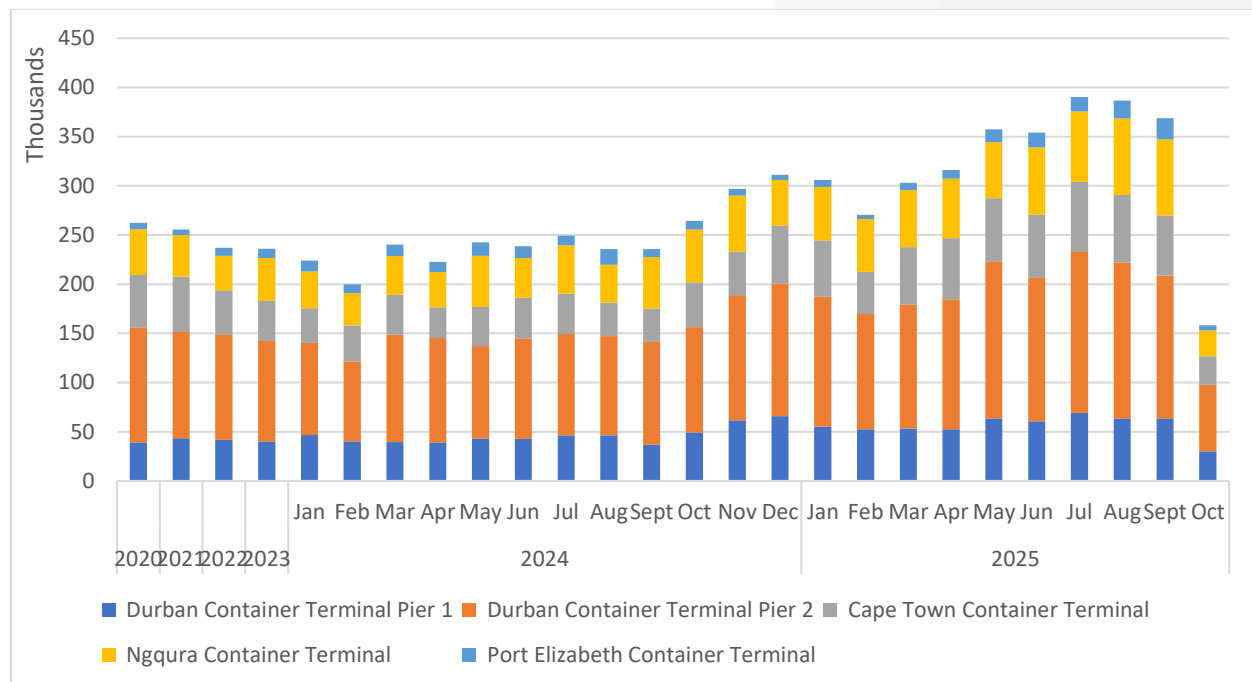
Table 3 – Container Ports – Weekly flow projected for 13 to 19 October (measured in TEUs)

7-day flow projected (13/10/2025 – 19/10/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 174	36 217	↓10%
New Pier (Pier 1)	1 983	13 883	↓26%
Cape Town Container Terminal	1 579	11 053	↓24%
Ngqura Container Terminal	2 294	16 061	↑0.2%
Port Elizabeth Container Terminal	424	2 966	↓23%
Other	937	6 560	↑1%
Total	12 391	86 740	↓13%

Source: Calculated from TPT, 2025. Updated 12/10/2025.

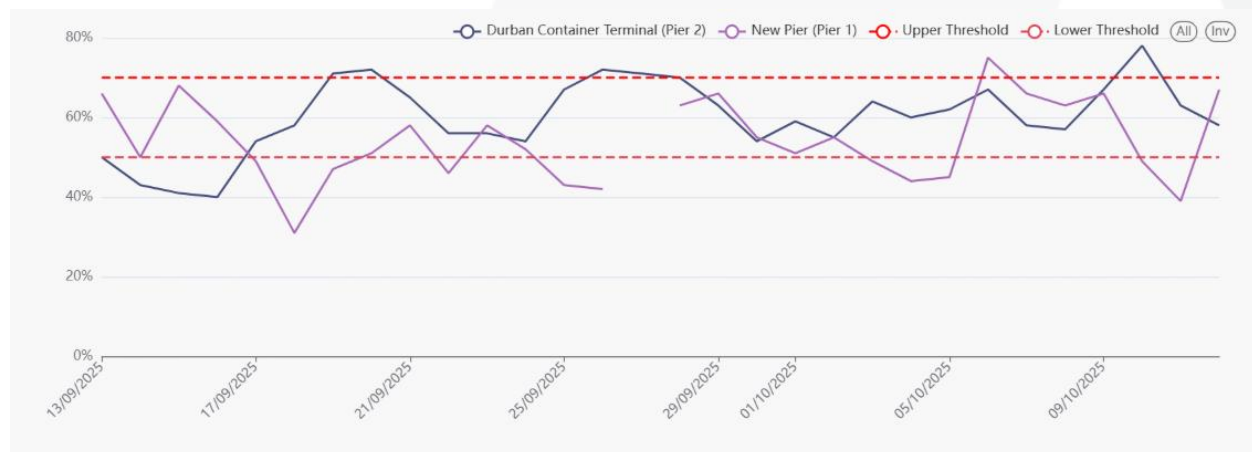
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2025, and updated 12/10/2025.

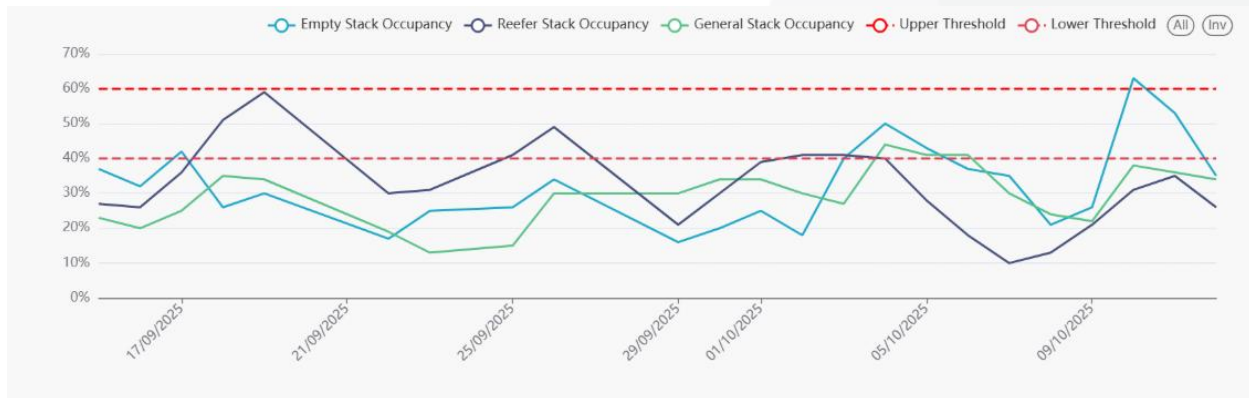
Figure 4 – Stack occupancy in DCT, general-purpose containers (13 September to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 12/10/2025.

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 (14 September to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 12/10/2025.

b. TNPA: September update

TNPA has released consolidated port statistics for September⁶, with another month of exemplary throughput performance for all sub-sectors across the board:

- Container throughput in September increased by **↑18%** (m/m) and annually by **↑10%** (y/y).
- Total bulk cargo increased monthly by **↑26%** (m/m) and annually by **↑17%** (y/y).
- Vehicles increased monthly and yearly by **↑8%** (m/m) and annually by **↑57%** (y/y).

The following table shows the respective changes versus August:

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

	Aug	Sep	Movement	% change
Containers (TEUs)	410 384	484 228	73 844	18%
Landed	212 336	234 336	22 000	10%
Shipped	198 048	249 892	51 844	26%
Dry bulk (MT)	14 474 082	17 857 425	3 383 343	23%
Liquid bulk (MT)	2 857 081	4 075 415	1 218 334	43%
Breakbulk (MT)	575 405	696 944	121 539	21%
Vehicles (Units)	81 690	114 484	32 794	40%
Total cargo (excl. Vehicles)	17 906 568	22 629 784	4 723 216	26%

Source: [TNPA](#), updated 12/10/2025.

Transnet Port Terminals handled **484 thousand containers** and **22,6 million metric tonnes** of bulk cargo during September, which is a post-pandemic record and the most since January 2019's **22,9 million**. Vehicle throughput also achieved a record, with a significant **114 484 units** moved through our ports, a substantial **26 156 more** than the previous record of August 2023. Compared to yearly trends, the positive trajectories continue, as evidenced by the following table:

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

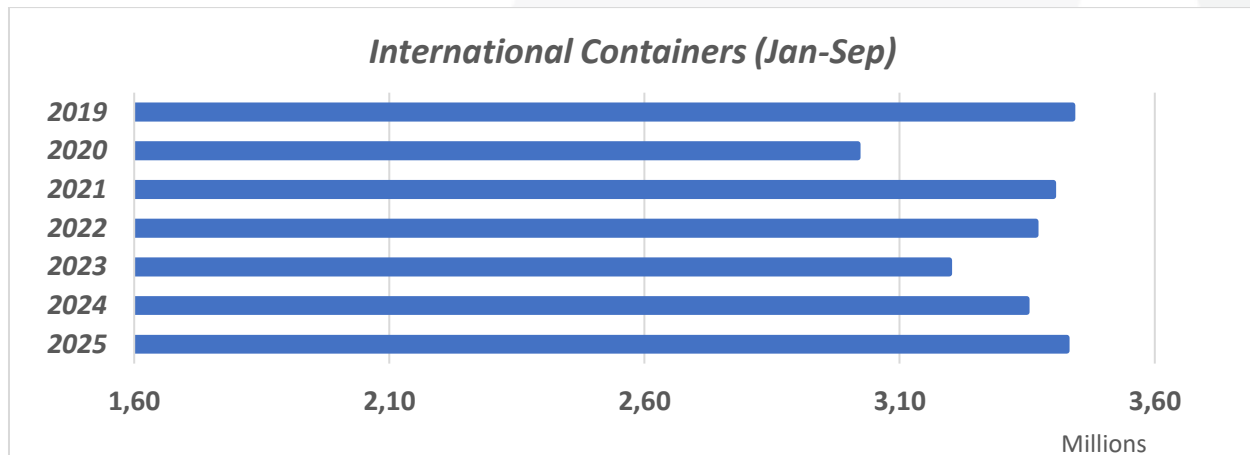
Table 5 – TNPA – Cyclical volume and growth: September 2019, 2024, and 2025

	2019	2024	2025	% 19 –'25	% '24-'25
Containers (TEUs)	403 695	441 182	484 228	20%	10%
Landed	200 467	216 447	234 336	17%	8%
Shipped	203 228	224 735	249 892	23%	11%
Dry bulk (MT)	14 578 697	15 347 571	17 857 425	22%	16%
Liquid bulk (MT)	3 158 423	3 185 844	4 075 415	29%	28%
Breakbulk (MT)	335 677	742 638	696 944	108%	-6%
Vehicles (Units)	81 202	73 040	114 484	41%	57%
Total cargo (excl. Vehicles)	18 072 797	19 276 053	22 629 784	25%	17%

Source: [TNPA](#), updated 12/10/2025.

Only breakbulk throughput is down annually ($\downarrow 6\%$, y/y); whereas containers ($\uparrow 10\%$), dry bulk ($\uparrow 16\%$) and vehicle throughput ($\uparrow 57\%$) have increased significantly compared to September 2024. When reading the cyclical figures with the year-to-date figures (note *Figure 2*), the confidence continues, as South Africa's bulk cargoes are up by $\uparrow 6,7\%$ YTD. Consequently, YTD, 2025 is *only* down by $\downarrow 2,9\%$ versus 2019. Moreover, with the significant improvement in container throughput for September, the container YTD has improved to $\uparrow 2,4\%$, after being down by $\downarrow 4,2\%$ just three months ago in June, as illustrated by the following year-to-date for containers to September:

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



Source: [TNPA](#), updated 12/10/2025.

Ultimately, improved performance across the logistics network has translated into stronger port operations, with the latest TNPA consolidated figures showing that containerised trade has nearly returned to 2019 levels ($\downarrow 0,3\%$). This progress reflects deliberate and coordinated efforts across the system – the deployment of new equipment, better alignment between hinterland, terminal, and waterside processes, and unprecedented collaboration among stakeholders. These combined levers have strengthened reliability and throughput across the network, signalling that the sector's recent recovery is not coincidental but the result of sustained operational discipline and collective commitment to restoring performance and competitiveness.

c. Summary of port operations

i. Weather and other delays

- Equipment challenges, accompanied by vacant berths, proved to be the primary operational constraints in Cape Town.
- Adverse weather conditions and equipment breakdowns ensured operational disruptions in Durban.
- Strong winds and vacant berths characterised operations at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

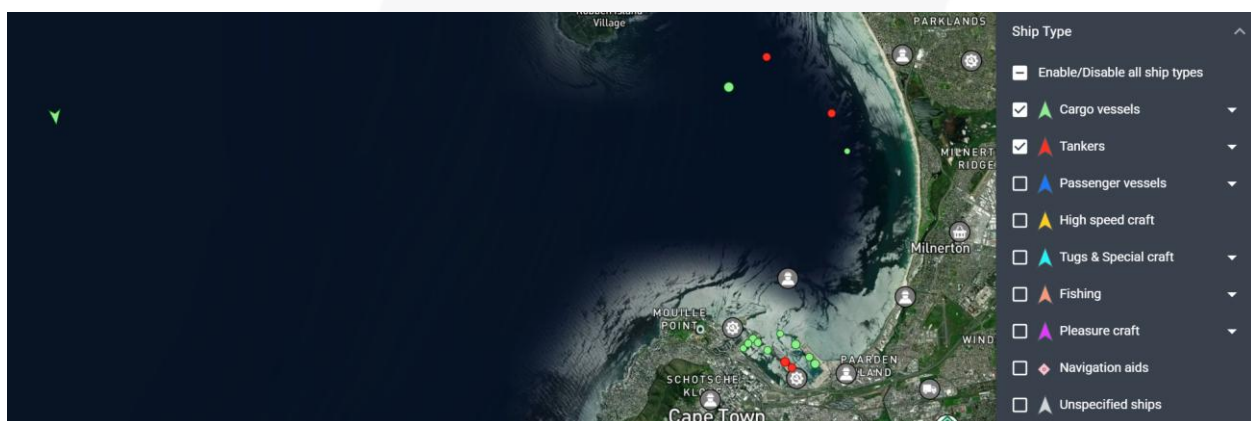
ii. Cape Town

On Friday, CTCT recorded two vessels at berth and none at anchor, as equipment challenges and vacant berths proved to be the primary operational constraints at the port. On the landside, between Monday and Friday, the terminal managed to service at least 5 618 trucks while handling approximately 369 rail units. On the waterside, the terminal executed approximately 5 382 container moves across the quay during the same period. Additionally, this week, the terminal operated with **7-9 STS cranes**, **30-32 RTGs**, and approximately **59 hauliers**.

On Tuesday, CTMPT had one berthed vessel, with zero vessels waiting at outer anchorage. During the previous 24-hour period, the terminal managed to handle 362 container moves on the waterside, while servicing approximately 46 trucks on the landside. Stack occupancy figures were recorded at 20% for the general stack, 22% for reefers, and 27% for empties. For the majority of the week, the terminal operated with two cranes and between 2 and 3 straddle carriers. During this period, Crane LM600 was out of commission due to repairs needed on the fire suppression system.

Between 29 September and 5 October, the FPT terminal handled seven vessels: one multi-cargo, two dry bulk, three container vessels, and one layby vessel. Berth occupancy during this period was recorded at 60%. The terminal planned to handle nine more vessels between 6 and 12 October, with another five vessels scheduled between 13 and 19 October. Adverse weather conditions, as well as the late arrival of transporters, resulted in operational delays during this period.

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



Source: Marine Traffic. Updated 12/10/2025 at 14:00.

iii. Durban

On Friday, Pier 1 recorded two vessels on berth, with zero vessels at anchor. Between Monday and Friday, the terminal executed at least 5 041 gate moves and 216 rail moves on the landside. The **average TTT** for the week was **~68 minutes (↑21%, w/w)**, as the **staging time** almost halved after last week's doubling, averaging **~45 minutes (↓44%)**. Additionally, the terminal moved over 10 600 TEUs across the quay on the waterside during the same period. The terminal had between **four and five STS cranes** and around **15-16 RTGs** available for the most significant part of the week.

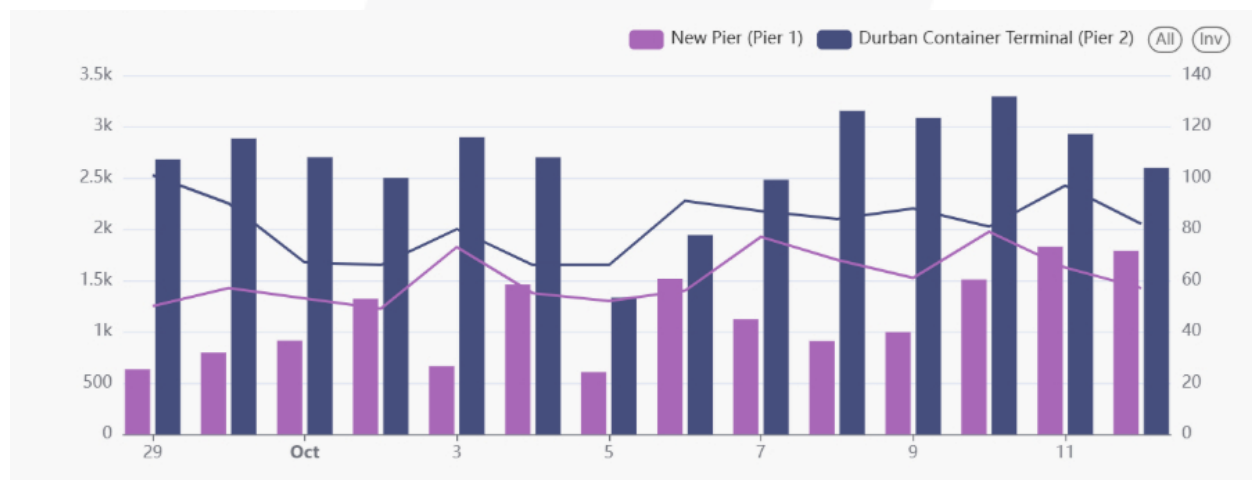
Pier 2 had four vessels on berth and four at anchorage on Friday, as equipment breakdowns and adverse weather prevented optimal operational performance this week. The terminal operated with **10 to 12 gangs** and moved over **19 100** containers across the quay between Monday and Friday on the waterside. Approximately **13 952** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~87 minutes (↑13%, w/w)** and an average **staging time** of **~104 minutes (↑14%)**. Approximately 2 208 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **66 and 69** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **62%** during this period.

Durban's MPT terminal recorded two vessels at berth on Tuesday and one at outer anchorage. Stack occupancy for containers was recorded at 38% and the breakbulk stack at 3%. In the preceding 24 hours, 697 containers but zero tons of breakbulk were handled on the waterside. On the landside, 402 container trucks were serviced at a TTT of ~39 minutes. Additionally, 21 breakbulk trucks were serviced, containing approximately 517 tons. During this period, three cranes, nine reach stackers, seven forklifts, and 19 ERFs were in operation. The latest reports from TPT maintain that the fourth crane is still on track to return to service around 22 December.

On Tuesday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with two at anchorage. In the preceding 24 hours, the terminal handled 1 559 road units and 120 units on rail on the landside, while 3 385 units were handled on the waterside. Overall stack occupancy was recorded at 93%, with 5% recorded at Q+R, and 70% at G-berth. The terminal had 218 abnormal loads and managed to handle 68.

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 terminal.

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 12/10/2025.

The queue of container vessels waiting outside Durban has increased this week, again at DCT Pier 2. On Tuesday evening (14 October), **one** container vessel was waiting outside at anchorage for Pier 1, **five** for Pier 2, and **three** for Point. The queue of dry (**five**), liquid (**four**), and breakbulk (**one**) vessels has also increased slightly from last week. The following snapshot shows the current status quo:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 12/10/2025 at 14:00.

iv. Richards Bay

On Tuesday, the Port of Richards Bay had four vessels at anchor and 11 on the berth, translating to four vessels at DBT, two 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 **171 000 tons (↑10%, w/w)** a day. An average of **21 trains** was serviced on the landside (down by **two** from last week), and slightly below the target of 22.

v. Eastern Cape ports

On Tuesday, NCT recorded three vessels on berth and none at anchor, with zero 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 24% for reefers and 18% 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 ten hours during this period, the terminal handled approximately 2 247 TEUs and 24 reefers on the waterside. Approximately 390 trucks were processed on the landside at a TTT of ~40 minutes. For the most significant part of the week, the terminal had between 5 and 7 STS cranes, between 23-26 RTGs, and around 44-62 hauliers in service.

On Tuesday, GCT had one vessel at berth and one at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 191 trucks were processed at a TTT of ~26 minutes on the landside, while 248 TEUs and 50 reefers were handled across the quay on the waterside despite being windbound for around eight hours. Stack occupancy was

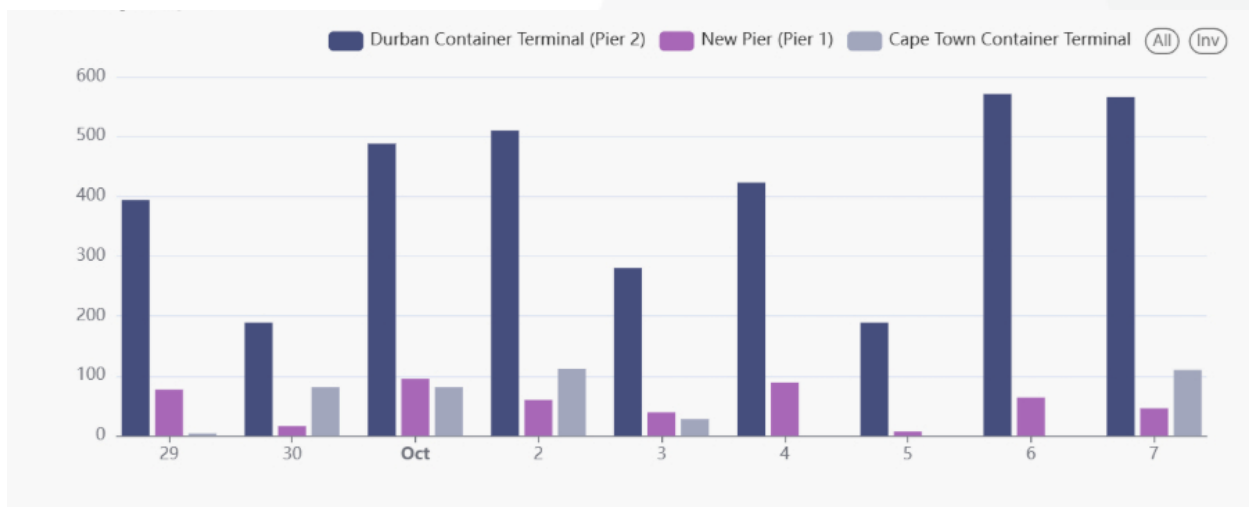
recorded at 54% for the general stack and 17% for reefers. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and seven straddles in service. Additionally, some equipment challenges hindered optimal operational performance this week.

On Monday, the Ro-Ro terminal recorded no vessels at berth or at outer anchorage. However, in the previous 24 hours, the terminal completed operations on the berthed vessel by handling the remaining 1 138 units. This ultimately resulted in a stack occupancy of 23%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that locomotive challenges are still creating bottlenecks on the line between City Deep and Mafikeng, while the ConCor line was closed on Monday due to monthly maintenance on the line. Additionally, on Tuesday, DCT Pier 2 had 473 ConCor units on hand with a dwell time of 48 hours and 409 over-border units with a dwell time of 71 days.

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



Source: Calculated using data from Transnet, 2024. Updated 12/10/2025.

In the last week (6 to 12 October), rail cargo on the ConCor line out of Durban was reported at **3 744** containers, up by **↑31%** from the previous week's **2 856** containers.

vii. General

The latest Ocean freight update from Maersk indicates that Port performance across West Africa currently shows steady improvement. In Conakry (Guinea), yard congestion and ongoing dredging through September have extended waiting times to around 30 days, while Abidjan (Côte d'Ivoire) has seen a strong recovery as new cranes, tugs, and better road access have reduced waiting times to 0-1 day for fixed-window vessels, even as the cocoa season gains pace. On the Customs front, the U.S. trade landscape is undergoing continued changes. The de minimis duty-free threshold of \$800 expired on August 29, and Section 232 tariffs on steel and aluminium remain high. New investigations now target sectors such as medical technology, robotics, and industrial machinery. Additionally, new tariffs on timber, lumber, and wooden furniture are set to take effect on October 14. A possible federal government shutdown could delay clearances by partner agencies, and AGOA trade preferences have expired and are awaiting renewal.

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 (6 to 12 October). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in October 2024 averaged **~974 000 kg**.

Table 6 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	629 945	4 409 612	↑5%
Volume outbound	440 961	3 086 728	↑11%
Total	1 070 906	7 496 340	↑7%

Courtesy of ACOC. Updated: 12/10/2025.

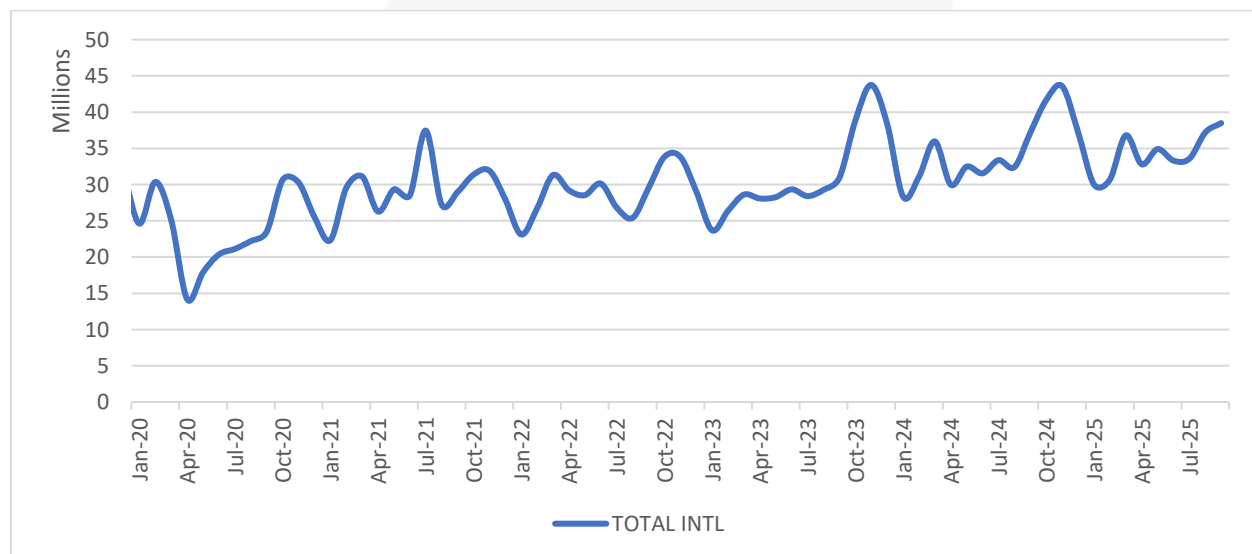
International air cargo lifted to and from ORTIA increased substantially this week – mainly driven by the increased outbound flows, offsetting the lull of last week. The daily average of air cargo handled amounted to **~630 000 kg** inbound (↑5%, w/w) and **~441 000 kg** outbound (↑11%). Consequently, the current levels mean that cargo is trending significantly above last year's level (↑10%) and the comparative levels of pre-pandemic 2019 (↑13%).

For the full month of September:

- Johannesburg increased by **↑1%** (m/m) versus August and is up by **↑4%** (y/y) versus 2024.
- Cape Town increased by **↑9%** (m/m), but decreased by **↓3%** (y/y) versus 2024.
- Durban increased by a pronounced **↑27%** (m/m) and by a substantial **↑38%** (y/y) versus 2024.
- Because of monthly increases all around, and similar to last month, the year-to-date cargo remains up by **~↑5,3%** (y/y) compared to 2024.

The following figure shows the international air cargo flows to and from all terminals since the start of the pandemic, with the sustained growth evident in the industry, which is very encouraging:

Figure 11 – International cargo for all international terminals – volumes per month (kg millions)



Calculated from ACOC. Updated: 12/10/2025.

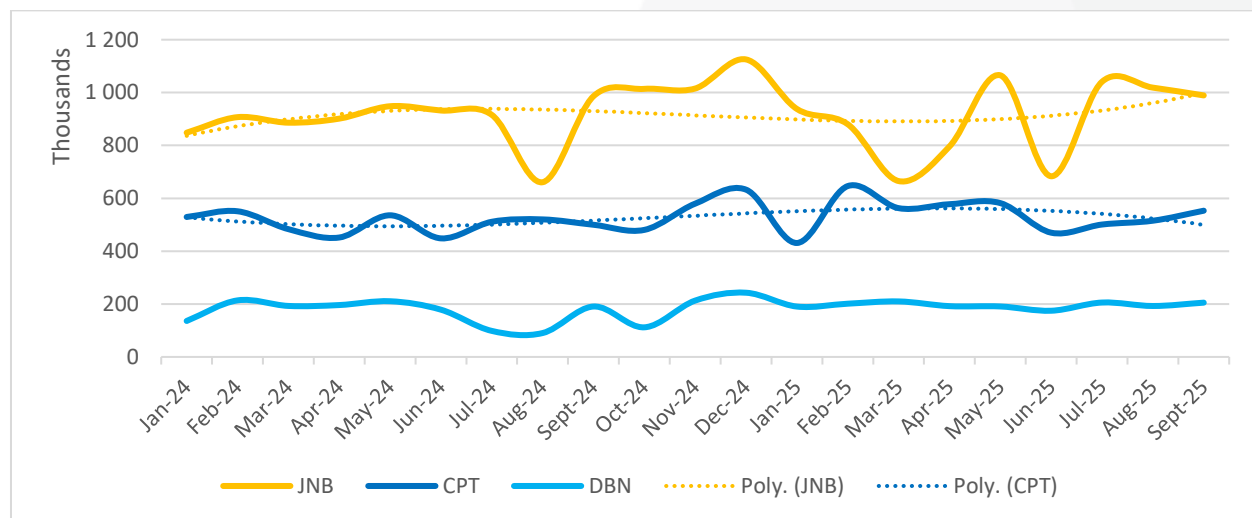
b. Domestic air cargo

For the full month of September, domestic volumes handled at our three main terminals were approximately similar to last month, but slightly more than this time last year:

- Johannesburg decreased by **↓3%** (m/m) versus August, and was approximately similar to last year September (**↑0,3%**, y/y).
- Cape Town increased by **↑7%** (m/m) and by **↑11%** (y/y) versus 2024.
- Durban increased by **↑7%** (m/m) and by **↑8%** (y/y) versus 2024.

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

Figure 12 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 12/10/2025.

c. Air cargo operations

Cargo operations feedback this week concerns two oft-mentioned topics, notably from the BMA and matters surrounding fuel supply to the sector:

1. Border Management Authority (BMA) and Port Health:

- Ongoing operational stress within the BMA and associated Port Health functions continues to impact cargo processing, particularly over weekends and after-hours, as persistent shortages of staff and funding have led to the suspension of overtime and limited inspection capacity, delaying the clearance of perishables and pharmaceuticals.
- The situation highlights the broader systemic challenge of inadequate resources, skills, and technology at critical border points, with national departments now urged to coordinate immediate intervention and long-term reform to stabilise border operations.

2. Aviation fuel supply:

- The national jet-fuel environment remains fragile, with continued concern around supply security following refinery constraints and regulatory bottlenecks.
- At Cape Town International Airport, stakeholders convened at short notice on Friday to review local fuel reserves and mitigation measures.
- While no critical shortages were reported, the need for coordinated oversight and improved supply chain resilience remains evident as the sector navigates elevated operational risk levels.

3. Road and Regional Update

a. Lebombo border post update

In the last week (6 to 12 October), movements along the N4 corridor decreased slightly for road transport and increased slightly for rail transport.

- Truck volumes through the border post decreased to around **1 394 HGVs per day** (↓2%, w/w).
- Queue times decreased to an average of **~6,9 hours** (↓3%) at the border.
- The average processing time decreased to an average of **~6,5 hours** (↓8%) per crossing.
- The rail to Maputo increased to an average of **ten trains daily** (up by **one** 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 7 – 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	1394	1375	1010	227	38	85	33	266	11	10	1	1
% (w/w)	-2%	-1%	-1%	-6%	-2%	-5%	-18%	-6%	18%	18%	20%	-20%
% 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 12/10/2025.

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 12/10/2025 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 increased by approximately **an hour** from last week, while transit time also increased – by around **an hour and a half**.
 - The median border crossing times at South African borders decreased by approximately **half an hour**, averaging **~10,7 hrs (↓4%)** for the week.
 - In contrast, the greater SADC region (excluding South African-controlled) increased significantly, by almost **two hours**, averaging **~6,9 hrs (↑38%)**.
1. **SARS network outages:**
 - a. SARS experienced network issues on Saturday, affecting declarations and manifests.
 - b. Transporters were asked to avoid duplicate response requests to reduce backlogs.
 - c. EDI responses resumed around 16:00 on the same day.
 2. **Operational disruptions in South Africa:**
 - a. Congestion was attributed to an influx of maize and wheat trucks and recent SARS system updates.
 - b. On Monday, a major fibre breakage between Louis Trichardt and Polokwane caused further network unavailability for several hours.
 3. **Zimbabwe congestion:**
 - a. Due to the maize season in Zimbabwe, nearly all trucks are being diverted to Condep post-Beitbridge.
 - b. As of Tuesday evening, more than 65 vehicles were queued. FESARTA was asked to intervene to mitigate the resulting severe delays.
 4. **Zimbabwe permit extension:**
 - a. The validity of the Zimbabwe Exemption Permit (ZEP) has been extended to **28 May 2027**.
 5. **Kazungula fire incident:**
 - a. A truck caught fire at the Kazungula One Stop Border Post on Sunday.
 - b. No dedicated firefighting equipment is installed at the border, and the local fire station serves the wider Kazungula region.
 - c. Two trucks were completely burnt out as a result.

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

Table 8 – Delays⁷ summary – South African borders⁸ (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	433	34,4	8,2	34,0	12 990	3 031
Beitbridge	Zimbabwe-SA	456	12,2	2,5	12,1	13 680	3 192
Groblersbrug	SA-Botswana	238	15,0	2,1	15,0	7 140	1 666
Martin's Drift	Botswana-SA	180	2,1	0,3	2,1	5 400	1 260
Kopfontein	SA-Botswana	179	13,7	1,3	13,4	5 370	1 253
Tlokweng	Botswana-SA	17	0,7	0,2	0,4	510	119
Vioolsdrift	SA-Namibia	30	4,4	1,4	4,3	900	210
Noordoewer	Namibia-SA	20	2,5	0,5	2,3	600	140
Nakop	SA-Namibia	30	2,7	0,4	2,4	900	210
Ariamsvlei	Namibia-SA	20	1,0	0,4	1,0	600	140
Skilpadshek	SA-Botswana	259	7,9	1,6	7,5	7 770	1 813
Pioneer Gate	Botswana-SA	62	1,4	0,0	0,0	1 860	434
Ramatlhabama	SA-Botswana	155	2,7	0,3	2,4	1 230	287
Ramatlhabama	Botswana-SA	41	0,6	0,1	0,4	4 650	1 085
Lebombo	SA-Mozambique	1 422	6,9	1,5	6,5	42 660	9 954
Ressano Garcia	Mozambique-SA	1 346	1,5	0,2	1,3	40 380	9 422
Sum/Average		4 888	6,9	1,3	6,6	146 640	34 216

Source: TLC, FESARTA, & Crickmay, week ending 05/10/2025.

Table 9 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	15,2	4,3	14,9	9 600	2 240
Central Corridor	798	3,3	0,4	3,2	23 940	5 586
Dar Es Salaam Corridor	1 819	16,1	2,0	16,0	54 570	12 733
Maputo Corridor	2 768	4,2	0,9	3,9	83 040	19 376
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 264	15,0	2,5	14,8	97 920	22 848
Northern Corridor	2 817	3,7	0,5	3,5	92 520	21 588
Trans Caprivi Corridor	743	3,9	0,5	3,5	22 290	5 201
Trans Cunene Corridor	100	2,7	0,6	2,5	3 000	700
Trans Kalahari Corridor	116	10,9	1,0	10,7	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	12 972	7,5	1,2	7,3	397 170	92 673

Source: TLC, FESARTA, & Crickmay, week ending 05/10/2025.

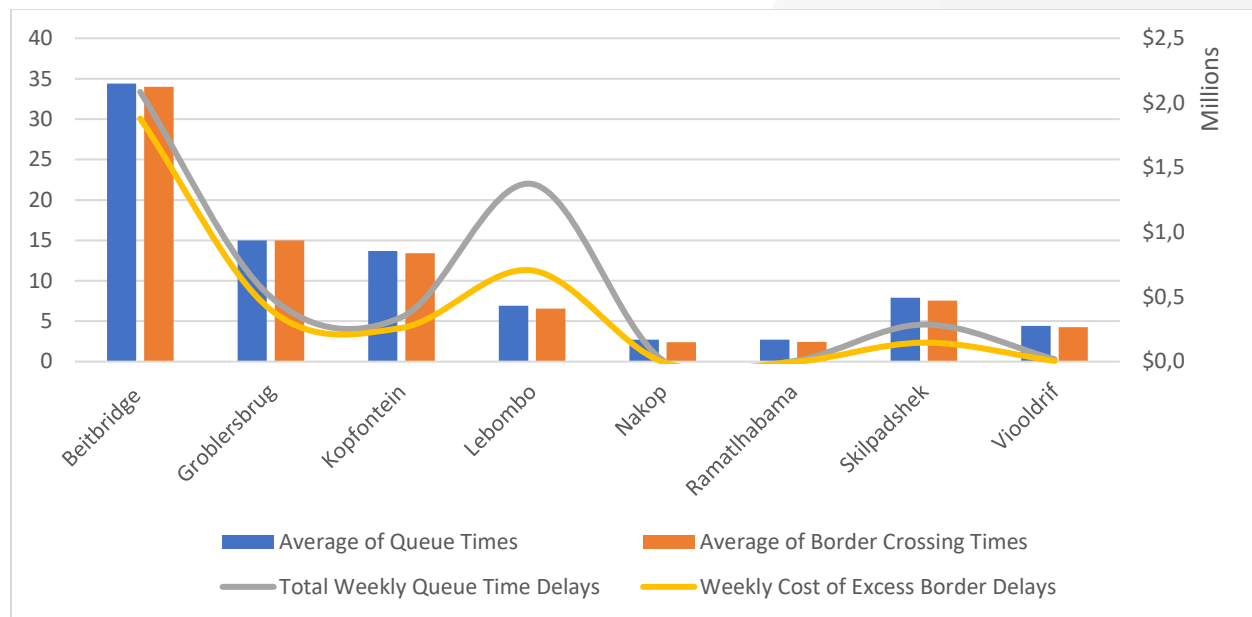
The following graph shows the weekly change in cross-border times and associated estimated costs:

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.

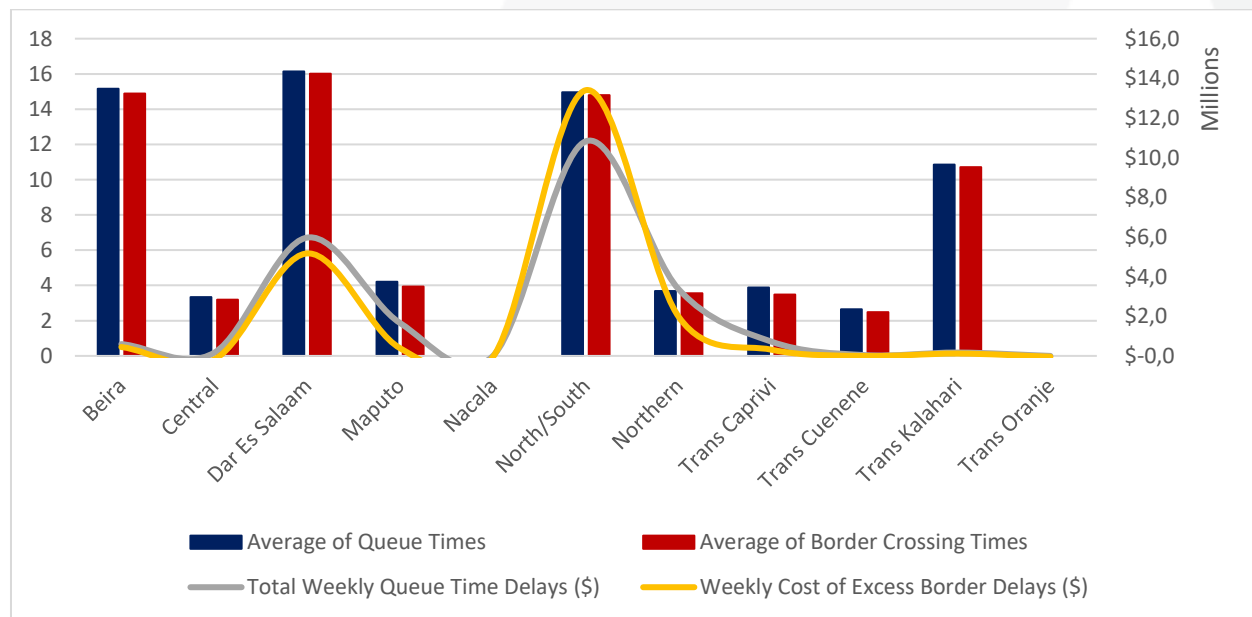
Figure 14 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 05/10/2025.

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

Figure 15 – Weekly cross-border delays & estimated cost from a corridor perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 05/10/2025.

In summary, cross-border queue time averaged **~7,5 hours** (up by **~1,2 hours** from the previous week's **~6,3 hours**), indirectly costing the transport industry an estimated **\$23,5 million (R406 million)**. Furthermore, the week's average cross-border transit times also hovered around **~7,3 hours** (up by **~1,6 hours** from the **~5,7 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$21,6 million (R372 million)**. Because of the crossing time increases at some borders, the total indirect cost for the week amounts to an estimated **~\$45 million (R778 million)**, significantly up by **↑314%** from the **~R188 million** in the previous report).

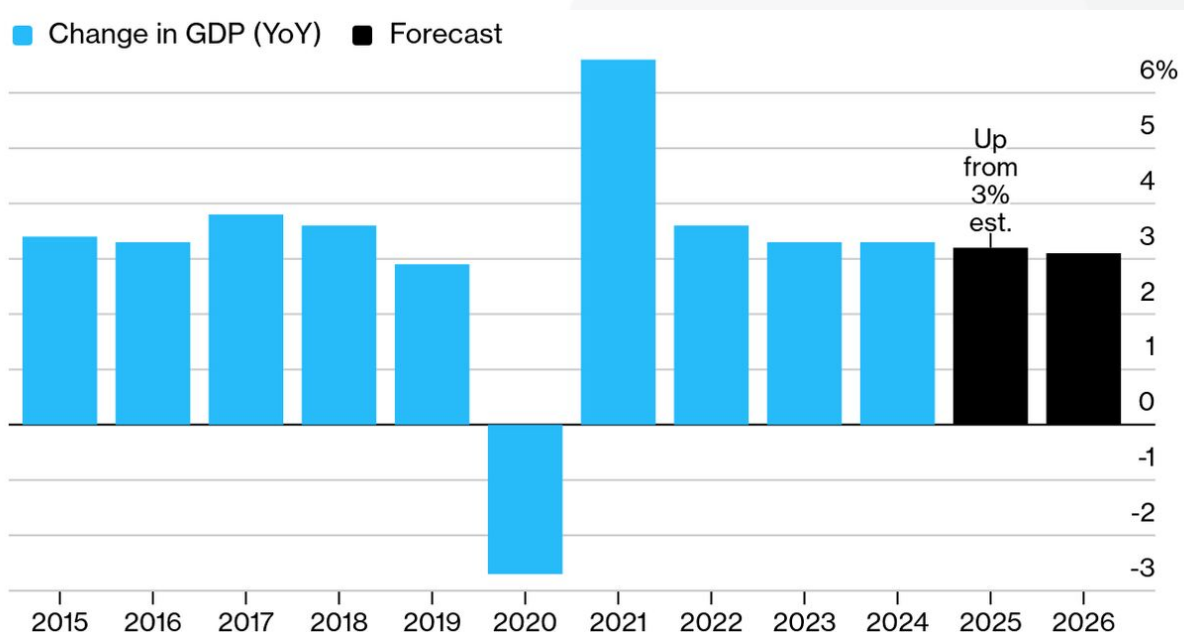
4. International Update

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

a. Global economy: IMF Outlook

The IMF's October 2025 "World Economic Outlook" projects modest growth ahead, with global output rising by **↑3,2%** in 2025 and slowing to **↑3,1%** in 2026, after an estimated **↑3,3%** in 2024. The upward revision from April reflects (1) fading extreme tariff pressures, (2) improved financial conditions, and (3) front-loading effects. Yet downside risks persist: (1) renewed protectionism, (2) supply constraints, (3) weak labour markets, and (4) macro-financial vulnerabilities may dampen momentum. Inflation is expected to gradually moderate, though it could remain elevated in some advanced economies. The following illustrates global growth across the last decade or so, as well as projected growth for this year and next:

Figure 16 – Change in GDP (y/y)



Source: IMF via [Bloomberg](https://www.bloomberg.com)

For **South Africa**, the outlook is more subdued. In its 2025 Article IV consultation, the IMF projects growth at **↑1,5%** on expectations of gains in electricity generation and logistics reforms, albeit flagging significant downside risks. Earlier in the year, the IMF had trimmed its forecast for South Africa from **↑1,5%** to **↑1,0%**, citing tariff spillovers and global uncertainty. In the latest version released this week, growth for 2025 has been revised upward by **↑0,1%** to **↑1,1%** - but downward for 2026 by **↓0,1%** to **↑1,2%**.

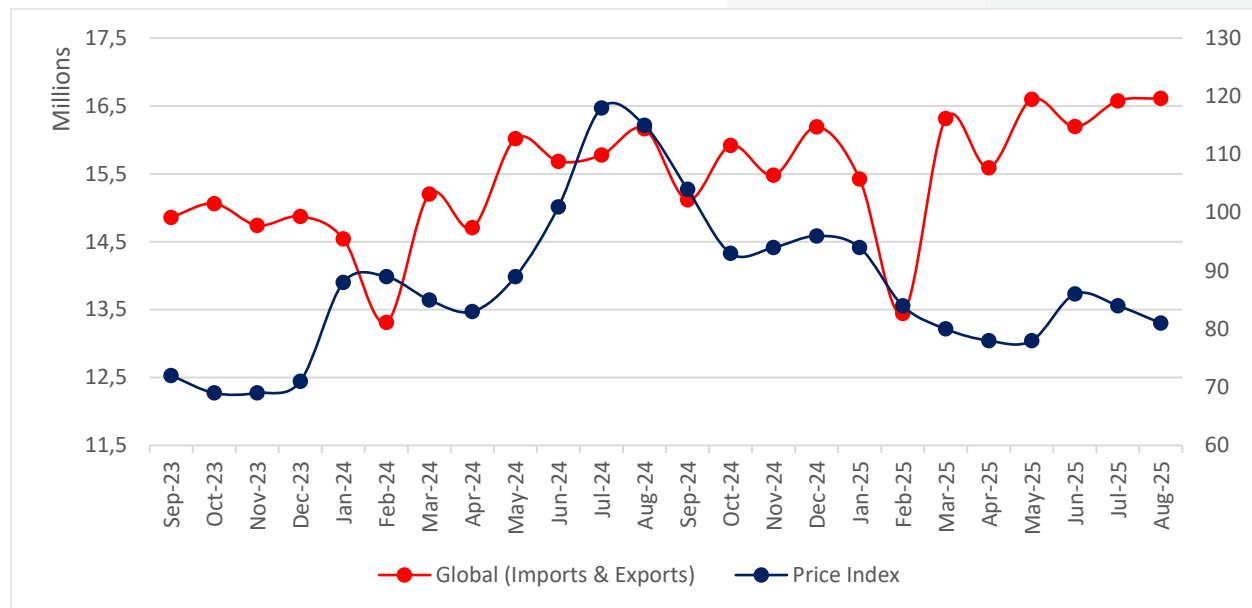
b. Global shipping industry

i. Global container trade statistics for July and Port Throughput Index

The latest container throughput figures for August from *Container Trade Statistics* (CTS) show that container volume increased to record levels in August. The total throughput is up by **↑0,8%** monthly and up by **↑2,8%** (y/y) annually and has eclipsed the record levels of May earlier this year. Regionally, it was a mix, as some trade lanes experienced increases in August, with Indian Sub-Continent and the Middle East imports increasing the most at **↑3,9%**. Notable decreases included Australian and Oceania imports (**↓22%**) and

imports into Europe (↓6%). The global price index (dry and reefer combined) decreased again in August by ↓3,6% monthly and remains significantly down by ↓30% yearly. Collectively, the following figure illustrates the global container throughput and price index in the last two years:

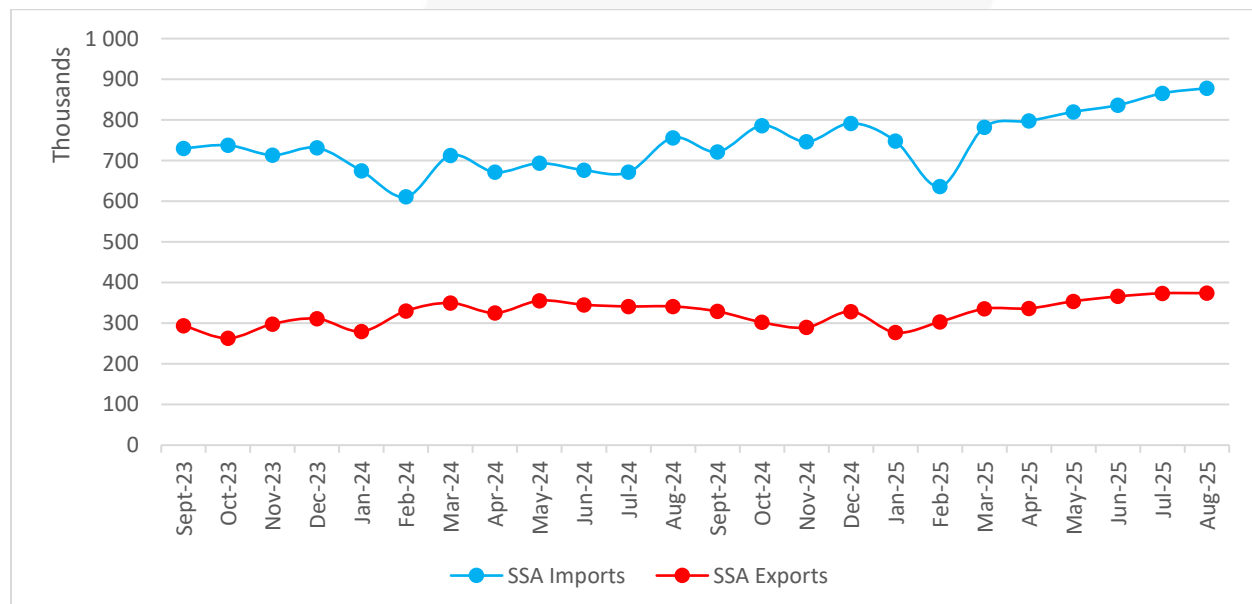
Figure 17 – Global Containerised Throughput (TEUs) and price index



Source: Calculated from [CTS](#)

Container throughput in July reached **16,61 million TEUs** – some **13 thousand containers** above the record level of May. The following figure shows Sub-Saharan African trade over the same period, with a **↑1,4%** (m/m) increase in containers imported, and a **↑0,1%** (m/m) increase in containers exported:

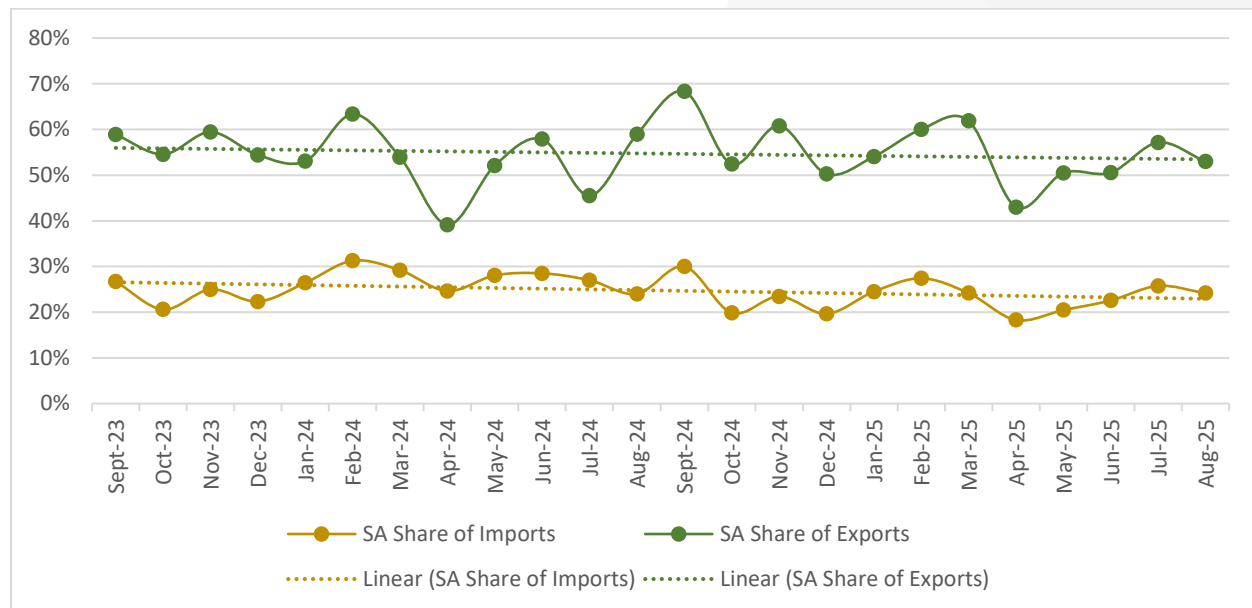
Figure 18 – Sub-Saharan Africa Containerised Throughput (TEUs)



Source: Calculated from [CTS](#)

Yearly SSA imports remain significantly up (**↑16%**, y/y) – with exports up by **↑9,6%** (y/y). The following graph, adding South Africa's share to SSA trade, shows a slight decline in the encouraging trend reversal, as Transnet's numbers in August (**410 384 TEUs**) remained cyclically high:

Figure 19 – South Africa's share in regional containerised throughput (% share)



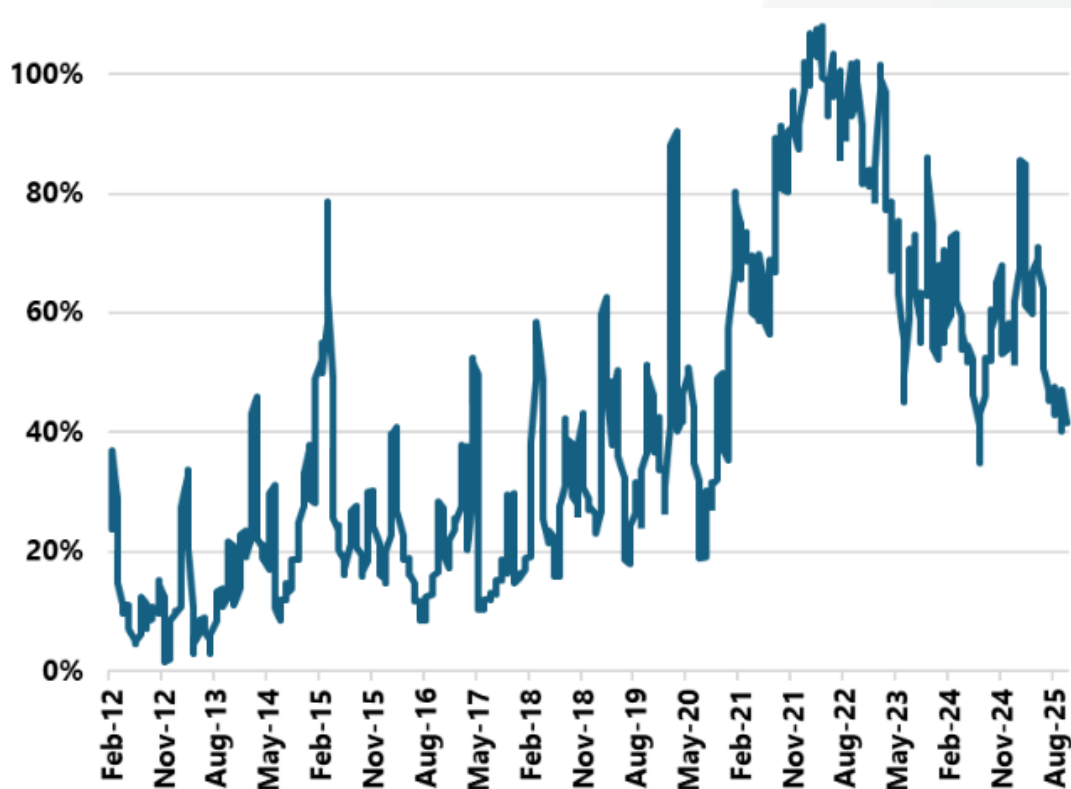
Source: Calculated from [CTS](#)

After the strong performance noted above in September, we can expect the share to increase. Nevertheless, South Africa accounted for approximately **24%** of SSA imports and **53%** of SSA exports in August, according to TNPA figures. These respective shares are still significantly less than the highs of **35%** in February 2022 for imports and **82%** in September 2022 for exports. Encouragingly, these gains have not only stemmed the tide but set the stage for a sustained rebound, and with the consistently strong weeks of late.

ii. Global industry summary

Sea Intelligence this week further confirmed that the container shipping sector continues to experience persistent service instability and operational strain, despite the relative normalisation of global supply-demand balances. Schedule reliability has declined for the fifth consecutive month, with average global reliability falling **below 60%**, and average vessel delays **now exceeding six days**. This sustained deterioration – mirroring patterns last seen during the post-pandemic congestion – reflects growing inefficiencies across major trades, particularly Asia–Europe and Transpacific lanes, as carriers struggle to maintain regular rotations amid blank sailings and equipment shortages. The picture is evident by the frequent changes in schedules, as illustrated here:

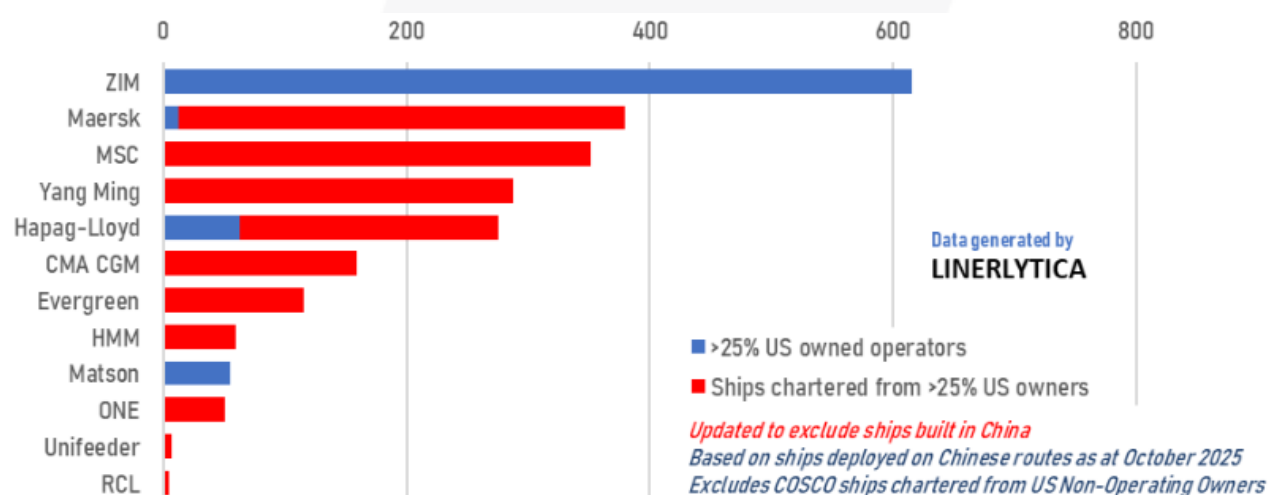
Figure 20 – Number of Weekly Changes in Asia-NAWC (5-week rolling average)



Source: [Sea Intelligence](http://SeaIntelligence)

Elsewhere, complementary developments reinforce a picture of systemic tension: **(1)** US port operations face delays amid political gridlock and shifting regulatory landscapes; **(2)** China's retaliatory port fee measures target US stakeholders; and **(3)** new environmental and financial compliance regimes are tightening global shipping costs. The Special Port Fee casts a broader net than initially expected, as it would include companies that have over **25% US equity** interests:

Figure 21 – Annual China Special Port Fee Payable @RMB400/NT (\$, millions)



Source: Linerlytica

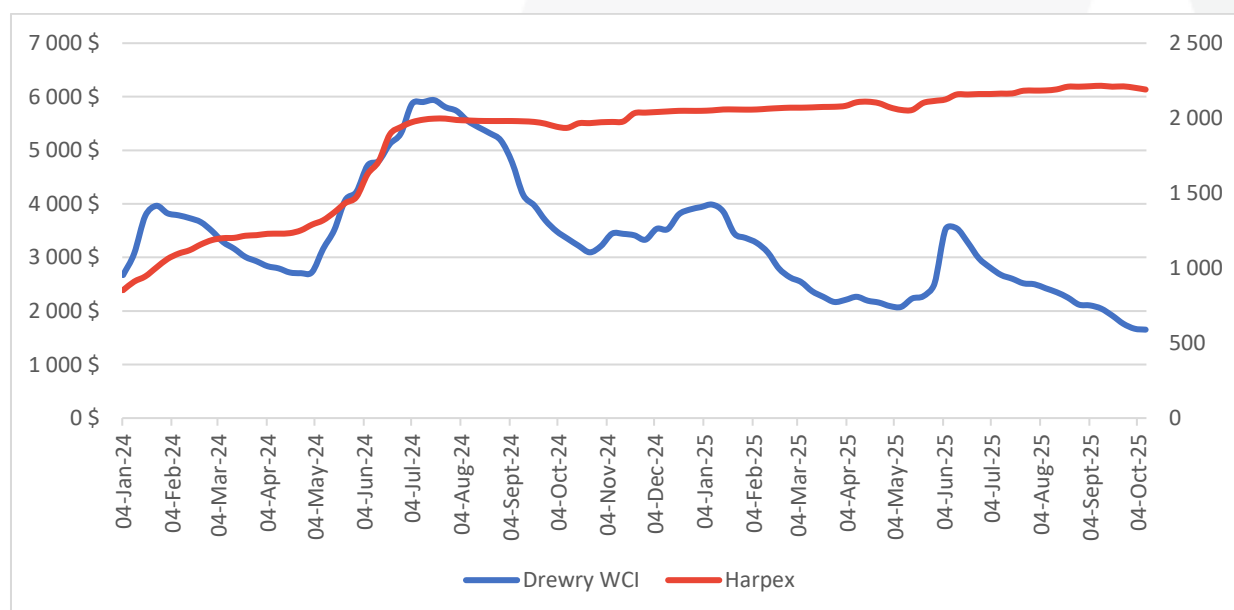
The fees encompass Zim as well as ships chartered from non-operating owners such as Seaspac, SFL, Navios, Costamare and Global Ship Lease. In a notice issued on 14 October, the MOT announced that ships built in China are exempt, reducing total fees from **\$3,9 billion** to **\$2,3 billion** in the first year. However, carriers operating chartered ships face cost increases of over **\$300 per TEU**, likely prompting route adjustments and potential disruptions as they reposition or rationalise fleets to mitigate the impact.

In summary, Linerlytica underscores a market caught between resilience and fragility.¹⁰ Spot rates have stabilised somewhat after months of erosion but remain volatile, with new tonnage inflows continuing to outpace trade growth. Idle capacity is edging up, while carriers intensify blank sailings to prevent further rate slippage. Nonetheless, box trades have outperformed forecasts, revealing surprising adaptability – especially in regional trades – despite weak European import demand and faltering US retail momentum. Taken together, the outlook remains one of structural instability within cyclical recovery – a market in which carriers’ operational discipline will determine profitability through the year’s end, as evidenced by the sustained recent slide in freight rates:

iii. Global freight rates

Drewry’s “World Container Index” dropped by another **↓1,1% (or \$18)** to **\$1 651 per 40-ft container** this week.¹¹ Charter rates also saw a slight decline; the *Harper Petersen Index* (Harpex) is trading around **2 191 points** on Friday (**↓1%, w/w**).¹²

Figure 22 – World Container Index (WCI) and Charter Rate Index (Harpex)



Source: [Drewry](#)

¹⁰ Linerlytica. 13/10/2025. [Market Pulse – Week 41](#).

¹¹ Drewry. 09/10/2025. [World Container Index](#).

¹² Harpex. 10/10/2025. [Harper Petersen Index](#).

c. Global air cargo industry

According to high-frequency metrics from World ACD, global air cargo activity showed a modest rebound in early October, led by Asia Pacific markets. Worldwide chargeable weight rose **↑1%** (2w/2w) and **↑3%** (y/y), despite regional disruptions from China's Golden Week and super-typhoon *Ragasa*. Notably, tonnages from Hong Kong to Europe surged **↑29%** (w/w), and China to Europe increased **↑6%**, reflecting post-typhoon recovery. However, overall global capacity remained steady (**↑2%**, y/y) and **↓1%** over the past five weeks, indicating a primarily balanced market.

Figure 23 – Capacity, chargeable weight and rates (last two to five weeks, % change)

Origin Regions

last 2 to 5 weeks



	Capacity ¹			Chargeable weight ¹			Rate ¹		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		+1%	+9%		-2%	-0%		+1%	+4%
Asia Pacific		-3%	+1%		-3%	+5%		+3%	-7%
C. & S. America		+0%	+4%		+2%	+1%		+2%	-2%
Europe		-1%	+3%		+0%	-0%		+2%	+2%
M. East & S. Asia		-0%	+4%		-0%	-2%		+1%	-22%
North America		-2%	-2%		-2%	+2%		+1%	-1%
Worldwide		-2%	+1%		-1%	+2%		+2%	-5%

Source: [World ACD](http://WorldACD)

In terms of pricing, global average airfreight rates climbed **↑3%** (w/w) to **\$2,51/kg**, though still **↓4%** lower year-on-year. Asia Pacific rates rose **↑5%** (w/w), but key trade lanes – especially from Hong Kong, Japan, and South Korea – remained below 2024 levels. Demand to Europe outperformed the USA, where volumes from China and Hong Kong remained volatile due to US import rule changes affecting e-commerce shipments. Overall, tonnage recovery outpaced rates, suggesting demand stabilisation amid constrained yield growth.

In other aviation news, fears of a traditional fourth-quarter lift, which might not materialise, are evident. Previous projections indicate that rates should rise about **↑3%** and **↑8%** from early October to mid-November as the industry ramps up end of year operations.¹³

ENDS¹⁴

¹³ Lennane, A. 09/10/2025. [Airfreight spot rates soften – but will traditional Q4 lift arrive?](#).

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.*