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Cargo Movement Update #256[1]

Date: 19 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)	37 377	42 582	**79 959**	46 818	53 339	**100 157**	**↓20%**
Air Cargo (tons)	4 419	3 567	**7 986**	4 410	3 087	**7 496**	**↑7%**

Monthly Snapshot

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

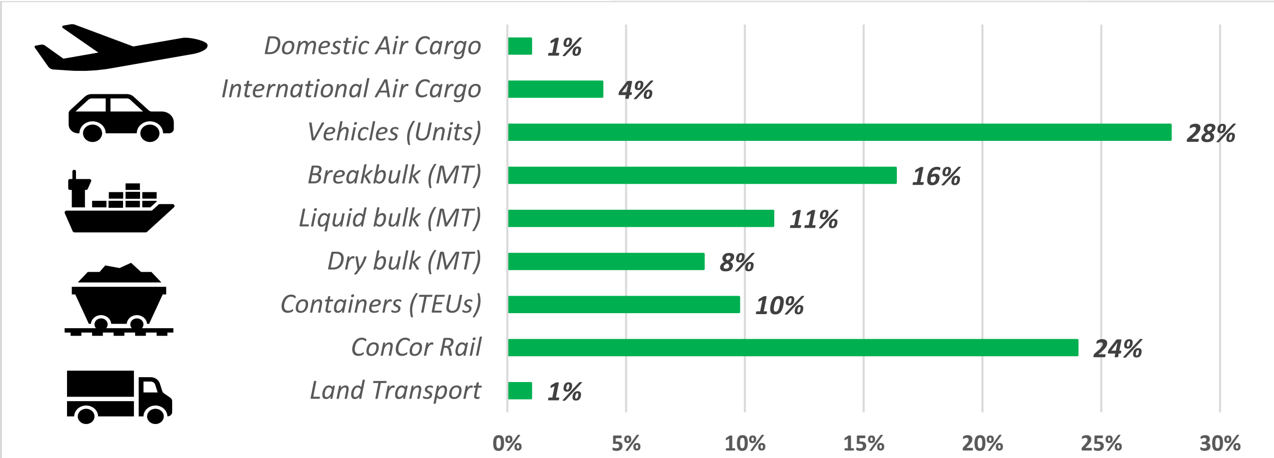
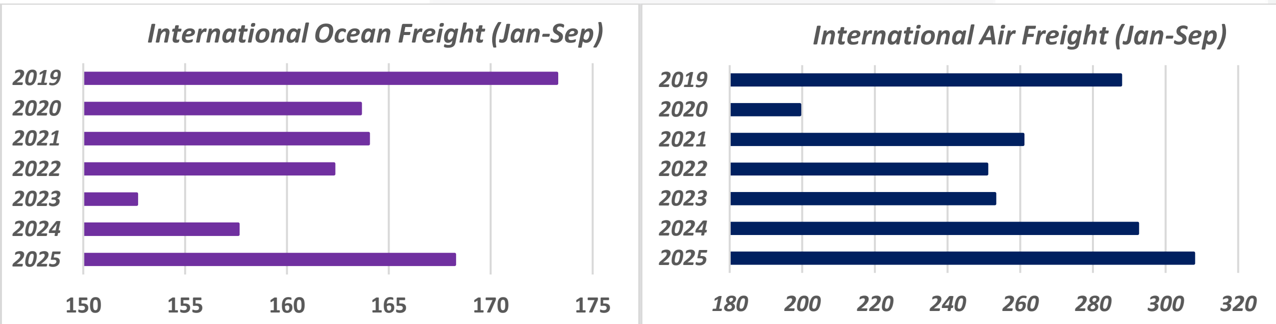


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~11 423 TEUs** was handled per day, with **~12 279 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 983** containers, up by **↑6%** from last week.
- Cross-border queue: **↓0,4 hrs**; transit: **↓0,3 hrs**; SA borders: **~11,4 hrs** (**↑6%**); SADC: **~6,5 hrs** (**↓6%**).
- IMO votes to adjourn the MEPC meeting, thereby postponing the adoption of the "*Net-Zero Framework*".
- Global rates rose for the first time in 17 weeks (**↑2,2%**), as charter rates have finally started to subside.
- Global air cargo volumes fell by **↓3%**, with overall rates up by **↑2%** (2w/2w) despite US-China drops.

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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 *256th* 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 **11 423 TEUs** was handled daily, a notable decrease from **12 279 TEUs** the previous week.

Port operations were characterised by inclement weather, vacant berths, as well as equipment breakdowns and shortages. Equipment challenges and adverse weather conditions ensured operational disruptions in Cape Town, while similar delays prevented optimal performance in Durban. More than 40 operational hours were conceded at our Eastern Cape Ports due to strong winds, 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. However, traffic on the line is easing and moving slightly quicker. The latest Southern Africa Terminal and Service Update from Maersk for Week 42 indicates that our major South African ports are generally fluid, with minimal waiting times recorded. Conversely, the picture looks slightly dimmer for our neighbouring ports.

Global ocean freight continues to be typified by both structural realignments and growing uncertainty across regulatory and market dimensions. The Ocean Alliance further consolidated its dominance on major East–West trades, projected to command over **40%** of Asia–Europe capacity and nearly **40%** on Transpacific routes, widening its lead over rivals and reshaping competitive dynamics among the top alliances. In parallel, the International Maritime Organisation's decision to postpone adoption of the "*Net-Zero Framework*" by one year has introduced renewed uncertainty for shipowners and financiers, particularly those considering investments in low-carbon or alternative-fuel tonnage. This delay effectively benefits carriers already transitioning to LNG and methanol-capable fleets, with Asian shipyards—especially in China, Korea, and Japan—continuing to dominate global orders.

The daily average of air cargo handled amounted to **~631 000 kg** inbound (**↑0,2%**, w/w) and **~510 000 kg** outbound (**↑16%**), which is a weekly record since our reporting began. Consequently, the current levels continue to trend significantly above last year's level (**~↑17%**) and the comparative levels of pre-pandemic 2019 (**~↑21%**).

Air cargo operational matters this week concern **(1)** processing constraints and backlogs (*4 000 shipments*, equating to a delay of around *12 days*) at BMA Health ORTIA, **(2)** trader compliance with SARS scanner bookings to sustain clearance efficiency, **(3)** stricter SAPS and access control measures due to the G20 Summit, and **(4)** collective support for developing a locally designed IVS permit system.

International air cargo volumes softened by around **↓3%** in week 41, mainly due to holiday-related slowdowns across Asia, while global rates eased slightly – most notably on China–US lanes – amid emerging trade tensions and subdued e-commerce demand. In other aviation news, **(1)** after a five year hiatus, China-India direct flights are resuming on 26 October 2025, and **(2)** an empty Boeing 747-400 BDSF freighter collided with a patrol vehicle while landing at HKIA.

Cargo movements along the N4 corridor increased for road transport and also for rail transport (although reporting has not been comprehensive). Truck volumes through the border post increased to around **1 467 HGVs per day** (**↑5%**, w/w). Queue times decreased to an average of **~6,5 hours** (**↓6%**) at the border. The average processing time decreased to an average of **~6,3 hours** (**↓38%**) per crossing. The rail to Maputo increased to an average of **12 trains daily** (up by **two** from last week). Sugar trains from Eswatini were stable at around **one train a day**.

After last week's significant increases, land border crossing times – on average – decreased across the SADC region. Overall, the average queue time decreased by approximately **half an hour** from last week, while transit time also decreased by the same magnitude – around **half an hour**. The median border crossing times at South African borders increased by approximately **three-quarters of an hour**, averaging **~11,4 hrs** (**↑6%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) increased significantly, by almost **two hours**, averaging **~6,5 hrs** (**↓6%**). This week, on average, the same 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 developments of note include **(1)** Skilpadshek border post disruptions, **(2)** an increase in dangerous goods traffic on the Copperbelt region, **(3)** a truck accident in Zimbabwe, and **(4)** political unrest delaying cargo flows in the DRC.

This week brought some continued operational delays and challenges – including the ongoing BMA and Port Health shortages at key borders, as well as substantial losses in operational time because of bad weather – however, there continues to be elevated numbers worth celebrating. Outbound air cargo was at the forefront this week, as OR Tambo had record air exports. Indeed, this is a moment of urgency and opportunity for South Africa's logistics sector: a time not only for reform but for continuous, rapid redesign. Encouragingly, progress is evident as we move beyond a fragmented, inefficient system toward a transparent, data-driven, and performance-based environment. The growing alignment between public and private stakeholders, guided by shared responsibility and infrastructure, is beginning to reposition South Africa within global supply chains – laying the groundwork for a more balanced, efficient, and competitive logistics network.

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 13 to 19 October (measured in TEUs)

7-day flow reported (13/10/2025 – 19/10/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 029	35 201	**↓13%**
New Pier (Pier 1)	2 588	18 116	**↓4%**
Cape Town Container Terminal	1 704	11 925	**↓18%**
Ngqura Container Terminal	1 333	9 329	**↓42%**
Port Elizabeth Container Terminal	31	214	**↓94%**
Other	739	5 174	**↓20%**
Total	**11 423**	**79 959**	**↓20%**

Source: Calculated from TPT, 2025. Updated 19/10/2025.

A decreased average of **~11 423 TEUs** (**↓20%**) was handled per day for the last week (*13 to 19 October, Table 2*). Throughput was below the projected average of **~12 391 TEUs** (**↓8%** actual versus projected).

For the coming week, an increased average of **~12 279 TEUs** (**↑8%**) is predicted to be handled (*20 to 26 October*, *Table 3*).

The decrease in throughput could mainly be explained by the list of challenges experienced this week. Port operations were characterised by inclement weather, vacant berths, as well as equipment breakdowns and shortages.

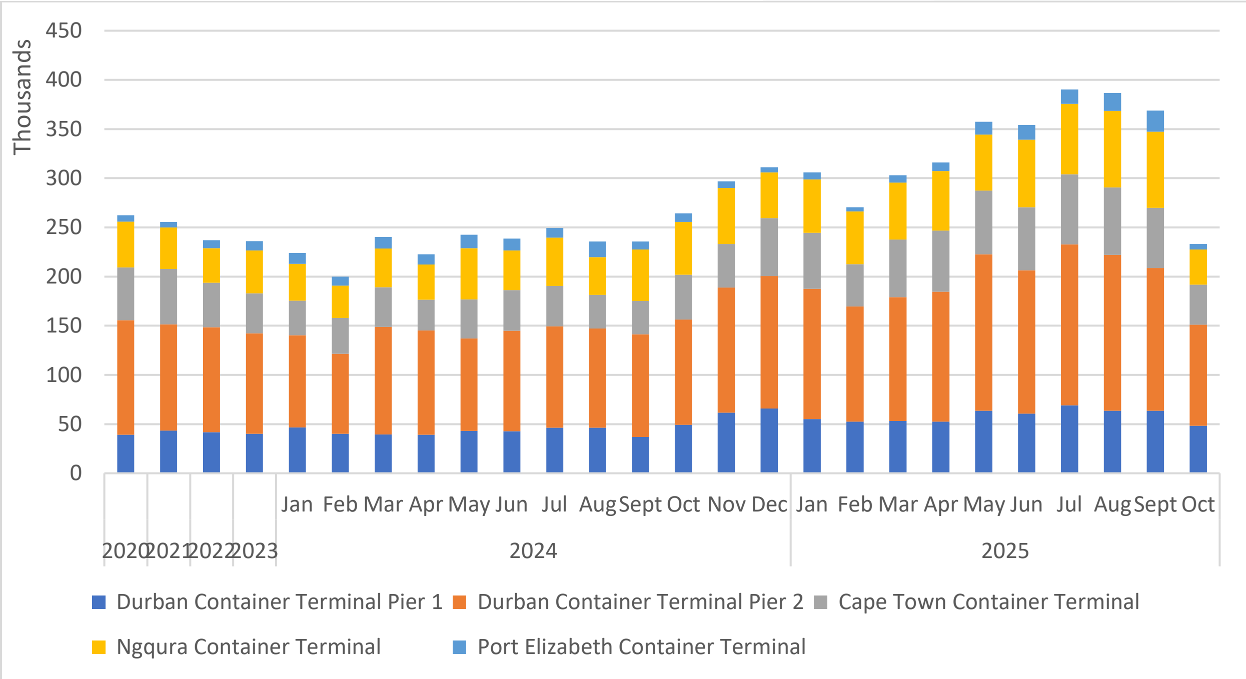
Table 3 – Container Ports – Weekly flow projected for 20 to 26 October (measured in TEUs)

7-day flow projected (20/10/2025 – 26/10/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 066	35 464	**↑1%**
New Pier (Pier 1)	1 942	13 594	**↓25%**
Cape Town Container Terminal	1 657	11 596	**↓3%**
Ngqura Container Terminal	2 275	15 925	**↑71%**
Port Elizabeth Container Terminal	418	2 923	**↑1 266%**
Other	922	6 454	**↑25%**
Total	**12 279**	**85 956**	**↑8%**

Source: Calculated from TPT, 2025. Updated 19/10/2025.

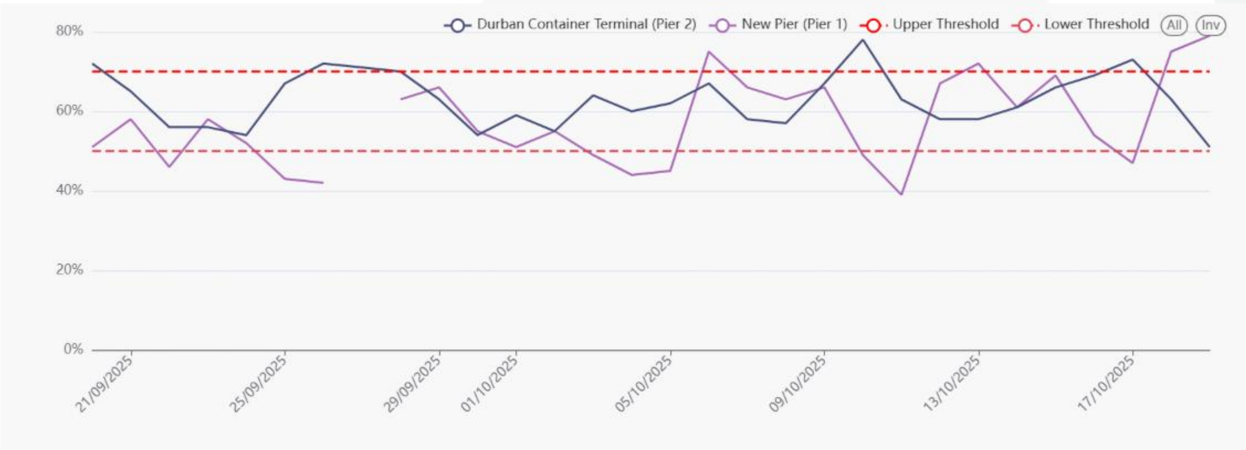
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2025, and updated 19/10/2025.

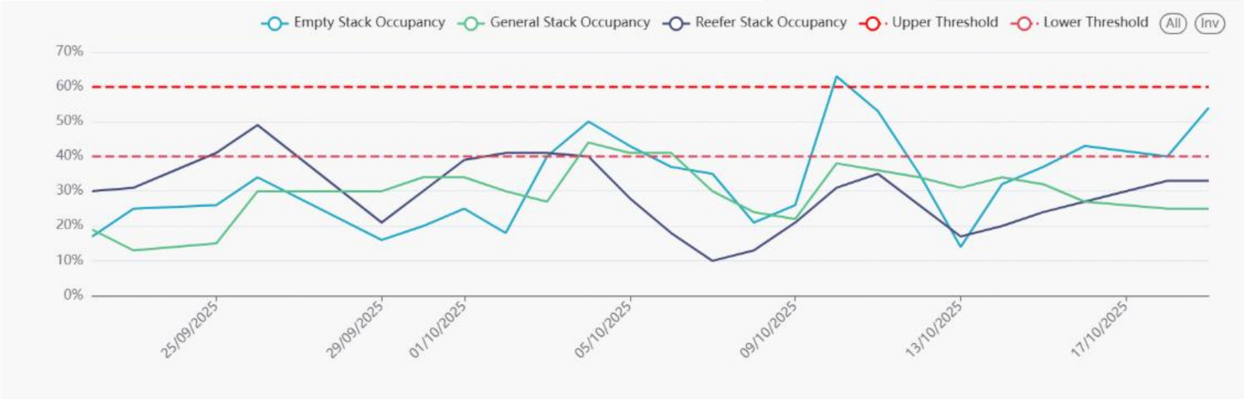
Figure 4 – Stack occupancy in DCT, general-purpose containers (21 September to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 19/10/2025.

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 (21 September to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 19/10/2025.

b. Summary of port operations

i. Weather and other delays

- Equipment challenges and adverse weather conditions ensured operational disruptions in Cape Town.
- Inclement weather, as well as equipment challenges and shortages, prevented optimal performance in Durban.
- More than 40 operational hours were conceded at our Eastern Cape Ports due to strong winds.
- Minimal delays were reported at the Port of Richards Bay.

ii. Cape Town

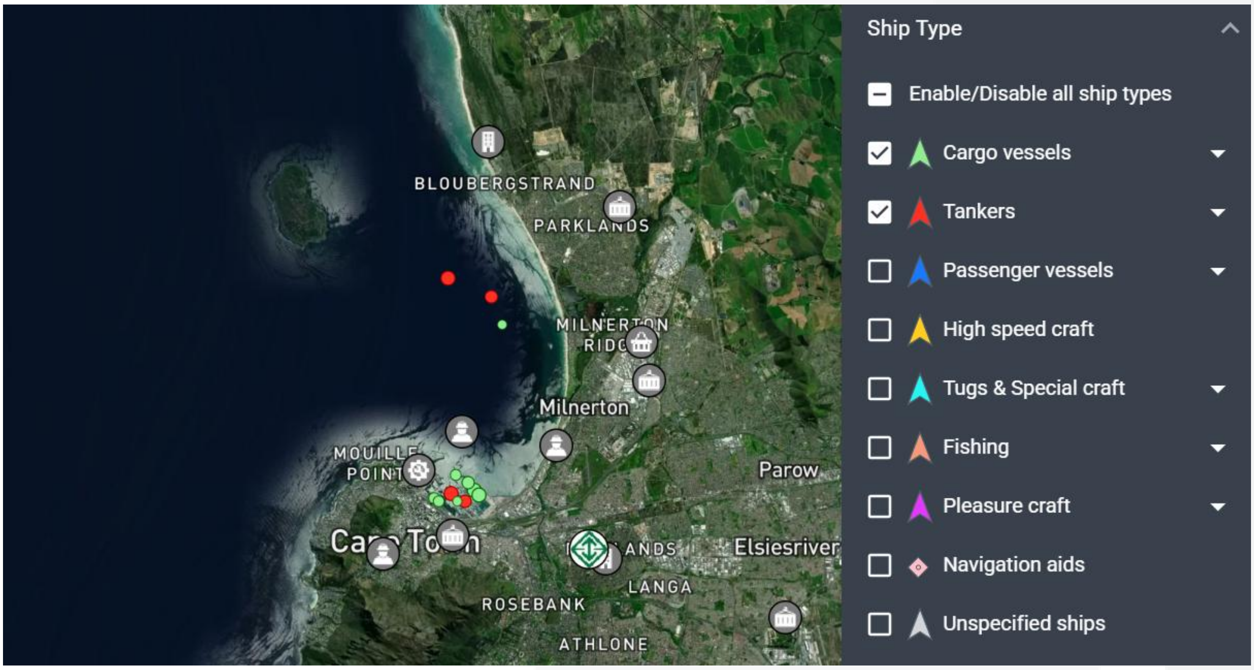
On Thursday, CTCT recorded two vessels at berth and none at anchor, as equipment challenges and adverse weather proved to be the primary operational constraints at the port. Indeed, the port was windbound for much of the weekend. On the landside, between Monday and Friday, the terminal managed to service at least 4 008 trucks while handling approximately 396 rail units. On the waterside, the terminal executed approximately 7 738 container moves across the quay during the same period. Additionally, this week, the terminal operated with **8-9 STS cranes**, **25-29 RTGs**, and approximately **58-59 hauliers**.

On Thursday, CTMPT had zero vessels at berth, with zero vessels waiting at outer anchorage. For the most significant part of the week, no waterside or landside volumes were handled at the terminal due to no vessels being on berth. As a result, stack occupancy figures were also recorded at 0% for the general-, reefer-, and empty stacks.

The latest reports from Maersk suggest that the Filotimo 537S will omit the Port of Cape Town. All imports will be discharged in Durban and connected to the Oslo Trader 547W to Cape Town.

Between 6 and 12 October, the FPT terminal handled eight vessels: five multi-cargo, one breakbulk, one container vessel, and one vessel containing cement. Berth occupancy during this period was recorded at 81%. The terminal planned to handle six more vessels between 13 and 19 October, with another four vessels scheduled between 20 and 26 October. Adverse weather conditions, taking the form of rain and dense fog, 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 19/10/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, with one vessel at anchor. Between Monday and Friday, the terminal executed at least 5 851 gate moves and 316 rail moves on the landside. The **average TTT** for the week was **~70 minutes** (**↑3%**, w/w), as the **staging time** increased slightly, averaging **~60 minutes** (**↑33%**). Additionally, the terminal moved over 6 900 TEUs across the quay on the waterside during the same period. The terminal had between **three and five** (out of seven) **STS cranes** and around **13-14** (out of 25) **RTGs** available for the most significant part of the week. STS crane availability thus roughly sat at 57% for the week, with RTG availability roughly sitting at 54%.

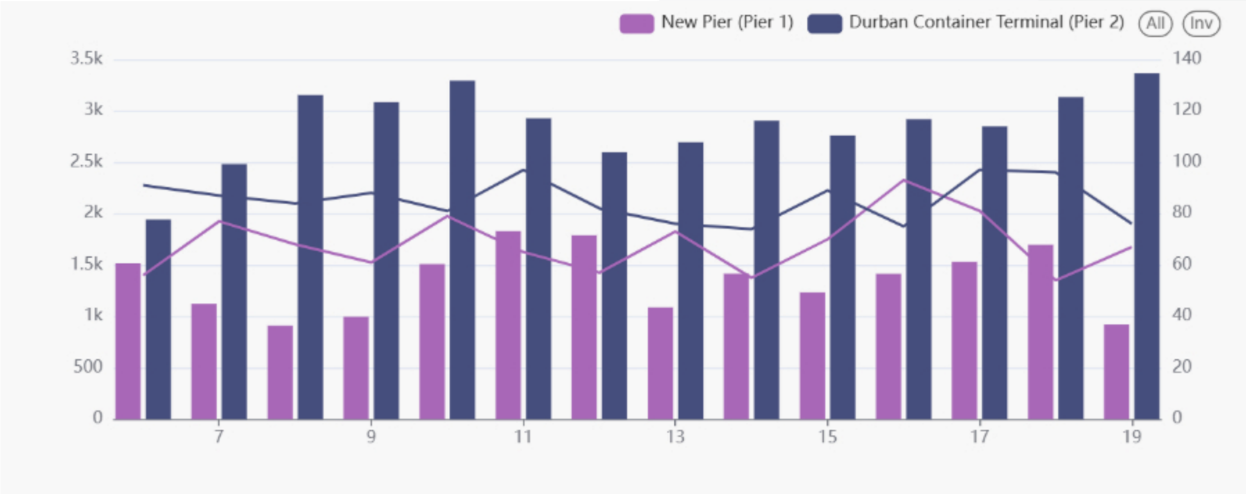
Pier 2 had four vessels on berth and three at anchorage on Thursday, as equipment breakdowns and adverse weather prevented optimal operational performance this week. The terminal operated with **11** to **12 gangs** and moved over **13 600** containers across the quay between Monday and Friday on the waterside. Approximately **11 180** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~83 minutes** (**↓5%**, w/w) and an average **staging time** of **~79 minutes** (**↓24%**). Approximately 2 264 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **59** and **70** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **60%** during this period.

Durban's MPT terminal recorded two vessels at berth on Thursday and two at outer anchorage. Stack occupancy for containers was recorded at 25% and the breakbulk stack at 60%. In the preceding 24 hours, 336 containers and 5 305 tons of breakbulk were handled on the waterside. On the landside, 258 container trucks were serviced at a TTT of ~36 minutes. Additionally, 56 breakbulk trucks were serviced, containing approximately 1 515 tons. During this period, two cranes, nine reach stackers, eight forklifts, and 20 ERFs were in operation. Towards the end of the week, the third crane (Crane 04) went out of commission with the technical team still conducting fault-finding operations on the machine. Additionally, the fourth crane is still on track to return to service around 22 December.

On Thursday, the Ro-Ro terminal in Durban recorded zero vessels on the berth, with three at anchorage. In the preceding 24 hours, the terminal handled 2 134 road units and 283 units on rail on the landside, while 344 units were handled on the waterside. Waterside targets were not reached during this period due to berthing delays. Overall stack occupancy was recorded at 95%, with 85% recorded at Q+R, and 85% at G-berth. The terminal had 192 abnormal loads and managed to handle 15.

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.

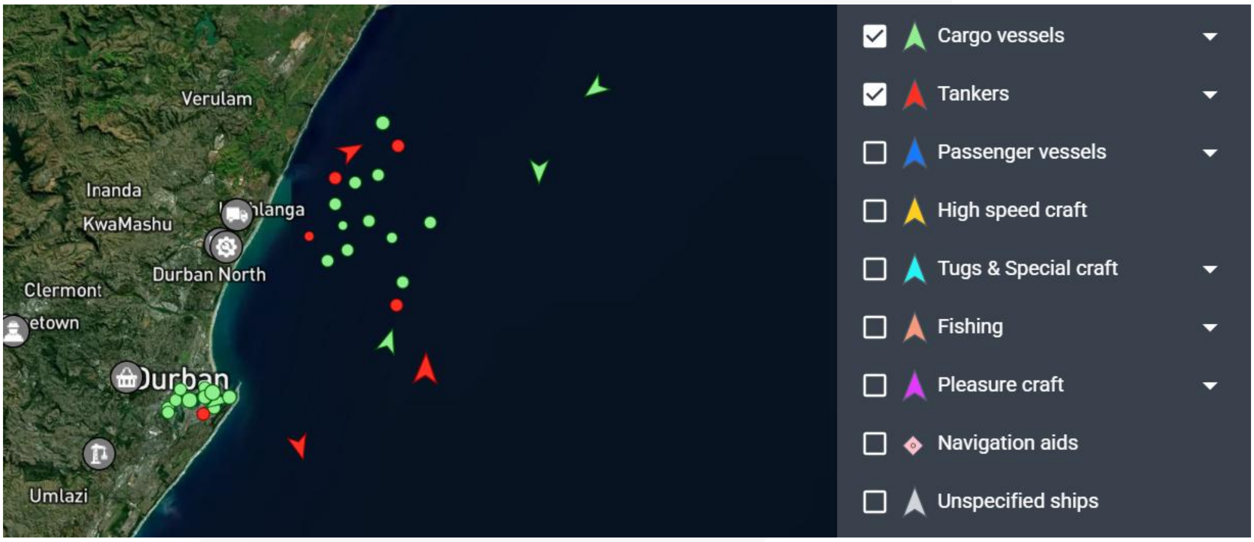
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 19/10/2025.

The queue of container vessels waiting outside Durban has remained stable this week despite the decrease in throughput. On Tuesday evening (20 October), **one** container vessel was waiting outside at anchorage for Pier 1, **two** for Pier 2, and **one** for Point. The queue of dry (**five**), liquid (**ten**), and breakbulk (**three**) vessels has increased slightly from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 19/10/2025 at 14:00.

iv. Richards Bay

On Thursday, the Port of Richards Bay had five vessels at anchor and 13 on the berth, translating to five 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 decreased and averaged around **159 500 tons** (**↓7%**, w/w) a day. An average of **23 trains** was serviced on the landside (up by **two** from last week), and slightly above the target of 22.

v. Eastern Cape ports

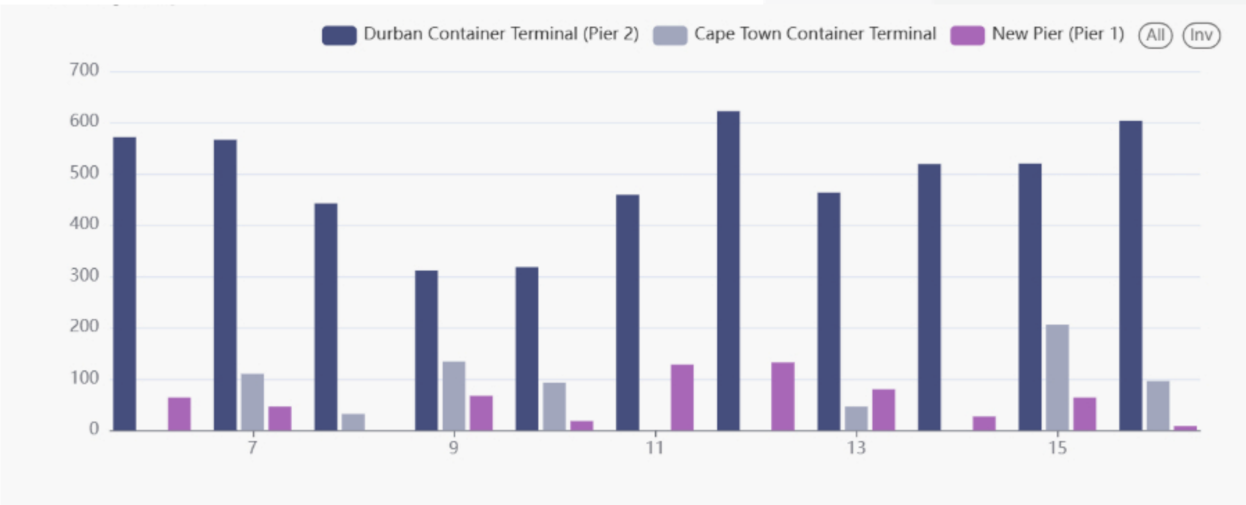
On Thursday, NCT recorded one vessel on berth and one at anchor, with zero vessels drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. For the majority of the week, the Ports of PE and Coega shared a pilot boat due to some challenges with their waterside equipment. Stack occupancy figures were recorded at 26% 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 20 hours during this period, the terminal handled approximately 432 TEUs and 16 reefers on the waterside. Approximately 107 trucks were processed on the landside at a TTT of ~37 minutes. For the most significant part of the week, the terminal had between 3 and 7 STS cranes, between 22-26 RTGs, and around 50 to 68 hauliers in service.

On Wednesday, 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, 42 trucks were processed at a TTT of ~18 minutes on the landside, while zero TEUs were handled across the quay on the waterside due to the terminal having no berthed vessel. Stack occupancy was recorded at 4% for the general stack and 1% for reefers. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and ten straddles in service. Additionally, some equipment challenges and adverse weather further hindered optimal operational performance this week.

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. However, traffic on the line is easing and moving slightly quicker. Additionally, towards the end of the week, DCT Pier 2 had 248 ConCor units on hand with a dwell time of 48 hours and 329 over-border units with a dwell time of 68 days. Unfortunately, there has been a derailment on the City Deep – Gaborone route, resulting in no traffic currently running, with operations estimated to resume on 26 October.

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



Source: Calculated using data from Transnet, 2024. Updated 19/10/2025.

In the last week (*13 to 19 October*), rail cargo on the ConCor line out of Durban was reported at **3 983** containers, up by **↑6%** from the previous week's **3 744** containers.

vii. General

The latest Southern Africa Terminal and Service Update from Maersk for Week 42 indicates that our major South African ports are generally fluid, with minimal waiting times recorded. No waiting times were recorded for CTCT, CTMPT, NCT, PECT, or DCT Pier 2. Pier 1 recorded a waiting time of approximately one day. Conversely, the picture looks slightly dimmer for our neighbouring ports, with Walvis Bay recording two days' waiting time, while Port Reunion and Maputo recording a waiting time of one day each. Port Louis recorded a waiting time of 4-7 days due to adverse weather, with Beira recording a waiting time of up to nine days.

Additionally, starting from 3 November, 'Cross Booking' shipments (where the booking and origin countries are different) will also be included within the scope of the Payer Amendment Fee. Previously, these were excluded. The fee (including tariff and currency) will be applied based on the origin country.

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 (*13 to 19 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

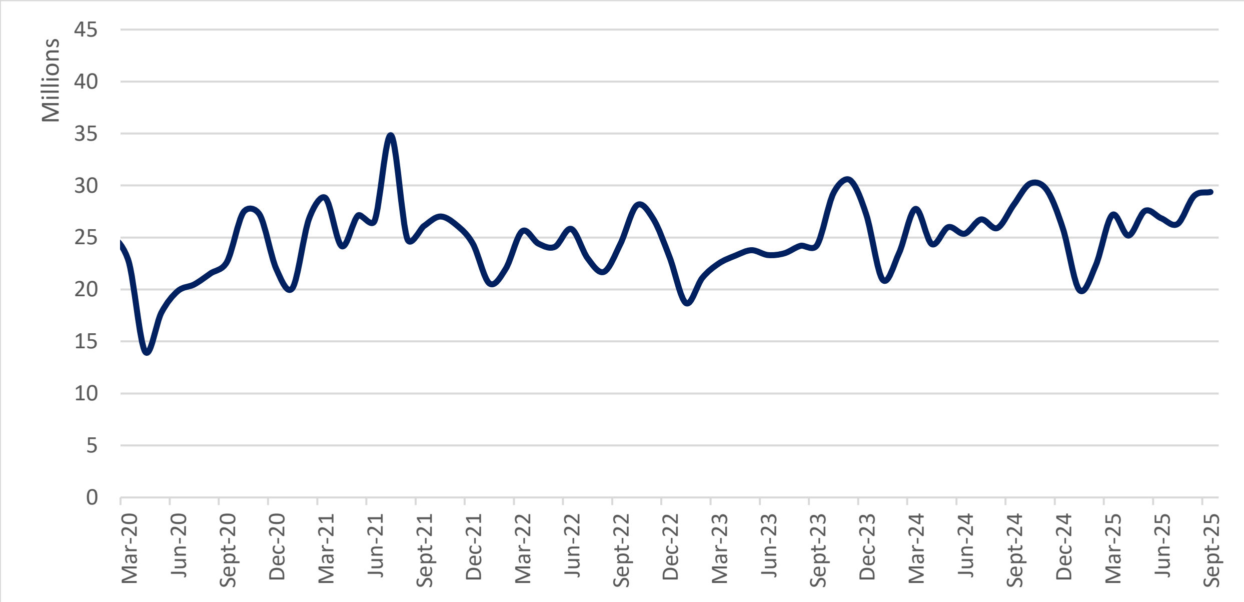
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	631 331	4 419 318	↑0,2%
Volume outbound	509 550	3 566 849	↑16%
Total	1 140 881	7 986 167	↑7%

Courtesy of ACOC. Updated: 19/10/2025.

International air cargo lifted to and from ORTIA increased again significantly this week – mainly driven by the increased outbound flows. The daily average of air cargo handled amounted to **~631 000 kg** inbound (**↑0,2%**, w/w) and **~510 000 kg** outbound (**↑16%**), which is a weekly record since our reporting began. Consequently, the current levels continue to trend significantly above last year's level (**~↑17%**) and the comparative levels of pre-pandemic 2019 (**~↑21%**).

The following figure shows the international air cargo flows to and from OR Tambo since the start of the pandemic, with the YTD average up by **↑20%** since then:

Figure 10 – International cargo for all international terminals – volumes per month (kg millions)

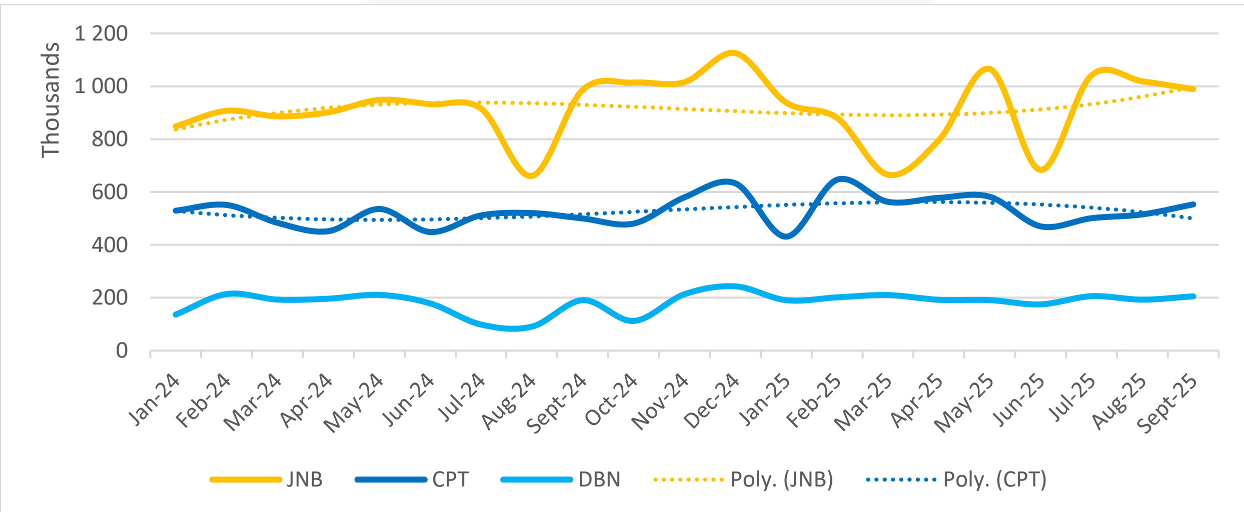


Calculated from ACOC. Updated: 19/10/2025.

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: 19/10/2025.

c. Air cargo operations

Cargo operations feedback this week concerns several recurring challenges – especially the constraints current at the BMA. As discussed at the latest ACOC plenary, the following matters are worth updating:

1. **Border Management Authority (BMA) – Port Health ORTIA:**
   a. The Port Health division continues to face operational constraints linked to limited overtime allocations, which have notably affected processing efficiency.
   b. The current backlog stands at approximately *4 000 shipments*, equating to a delay of around *12 days*.
   c. These bottlenecks have had a knock-on effect on clearance times and overall air cargo throughput.
2. **SARS – Customs operations:**
   a. No systemic issues were reported on the customs side.
   b. However, traders are *strongly encouraged to adhere to their allocated scanner examination bookings*, as compliance supports SARS in maintaining smooth inspection workflows and prevents downstream congestion.
3. **SAPS and airline operations – access control:**
   a. Heightened security protocols are currently in effect due to the *G20 Summit*.
   b. The South African Police Service (SAPS) and airport authorities have implemented stricter access control measures around airside operations.
   c. Stakeholders are advised to factor in additional time for clearances and coordinate closely with their ground handling teams. A detailed advisory was circulated via the WhatsApp coordination group.
4. **IVS Permits – system development:**
   a. Consensus was reached on the need to design an *import veterinary system (IVS)* tailored to the South African operational environment, rather than retrofitting pre-existing international models.
   b. This localised approach aims to ensure system relevance, efficiency, and regulatory compatibility.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*13 to 19 October)*, movements along the N4 corridor increased for road transport and also for rail transport (although reporting has not been comprehensive).

- Truck volumes through the border post increased to around **1 467 HGVs per day** (**↑5%**, w/w).
- Queue times decreased to an average of **~6,5 hours** (**↓6%**) at the border.
- The average processing time decreased to an average of **~6,3 hours** (**↓38%**) per crossing.
- The rail to Maputo increased to an average of **12 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:

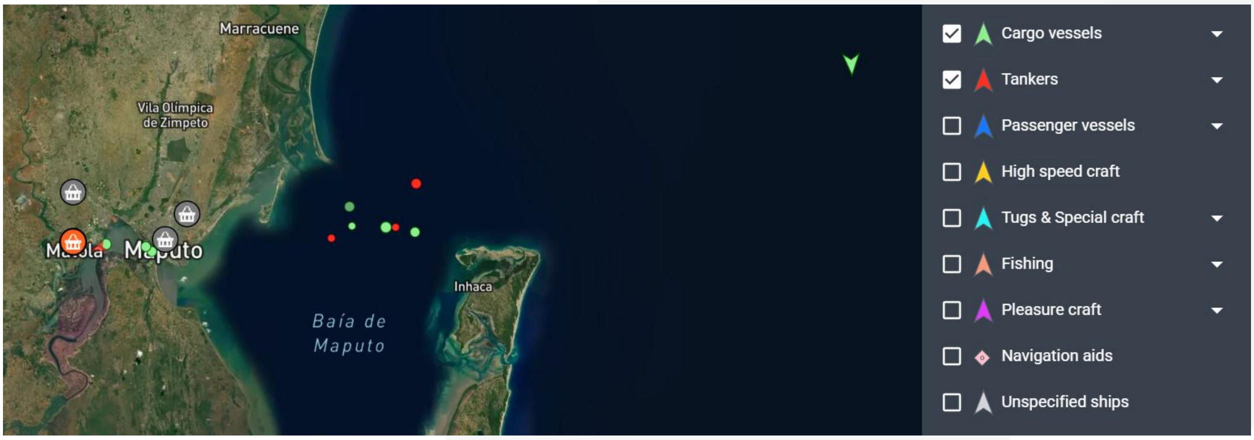
Table 5 – Lebombo border post update

	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	**1467**	**1263**	**1067**	**234**	**28**	**93**	**41**	**269**	**13**	**12**	**2**	**1**
% (w/w)	**5%**	**-9%**	**5%**	**3%**	**-35%**	**9%**	**19%**	**1%**	**23%**	**17%**	**40%**	**33%**
% 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 19/10/2025.

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 19/10/2025 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 **half an hour** from last week, while transit time also decreased by the same magnitude – around **half an hour**.
- The median border crossing times at South African borders increased by approximately **three quarters of an hour**, averaging **~11,4 hrs** (**↑6%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased significantly, by almost **two hours**, averaging **~6,5 hrs** (**↓6%**).

1. **Skilpadshek border post disruptions:**
    a. Operations were disrupted on Saturday due to protest action by a group of truck drivers who blocked the road, preventing the processing of vehicles.
    b. Police intervened later in the morning, and regular movement was restored thereafter.
2. **Increased dangerous goods traffic:**
    a. Ongoing high demand for acid in the Copperbelt region has led to a notable increase in dangerous goods vehicles.
    b. On Monday, over 53 acid-carrying trucks were recorded in the Dangerous Goods Truck Park.

3. **Incident in Zimbabwe:**
   a. A truck transporting cooking oil lost its load approximately 2 km from Gwai Bridge.
   b. The vehicle caught fire following the incident.
4. **Democratic Republic of Congo (DRC):**
   a. Recent political unrest has affected cross-border traffic, with road blockages at Kanyika on the route to Lubumbashi.
   b. While police have since restored order, transporters remain cautious, and some are still uncertain about the safety of proceeding into DRC.

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	560	33,5	10,0	33,0	16 800	3 920
Beitbridge	Zimbabwe-SA	524	10,6	2,3	10,4	15 720	3 668
Groblersbrug	SA-Botswana	265	18,5	2,4	18,3	7 950	1 855
Martin’s Drift	Botswana-SA	195	2,4	0,4	2,3	5 850	1 365
Kopfontein	SA-Botswana	240	13,9	2,0	13,5	7 200	1 680
Tlokweng	Botswana-SA	25	0,7	0,2	0,4	750	175
Vioolsdrift	SA-Namibia	30	4,5	1,4	4,3	900	210
Noordoewer	Namibia-SA	20	2,5	0,4	2,3	600	140
Nakop	SA-Namibia	30	3,9	0,3	3,6	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,4	1,1	600	140
Skilpadshek	SA-Botswana	306	9,0	2,2	8,6	9 180	2 142
Pioneer Gate	Botswana-SA	54	1,3	0,0	0,0	1 620	378
Ramatlhabama	SA-Botswana	218	3,4	0,6	3,3	1 530	357
Ramatlhabama	Botswana-SA	51	0,4	0,1	0,3	6 540	1 526
Lebombo	SA-Mozambique	1 394	6,5	2,1	6,3	41 820	9 758
Ressano Garcia	Mozambique-SA	1 337	1,8	0,3	1,5	40 110	9 359
Sum/Average		**5 269**	**7,1**	**1,6**	**6,8**	**158 070**	**36 883**

Source: TLC, FESARTA, & Crickmay, week ending 12/10/2025.

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	12,3	3,6	11,9	9 600	2 240
Central Corridor	798	1,8	0,3	2,4	23 940	5 586
Dar Es Salaam Corridor	1 819	15,4	2,0	16,0	54 570	12 733
Maputo Corridor	2 731	4,2	1,2	3,9	81 930	19 117
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 501	14,2	2,5	14,0	105 030	24 507
Northern Corridor	2 817	3,4	0,6	3,4	92 520	21 588

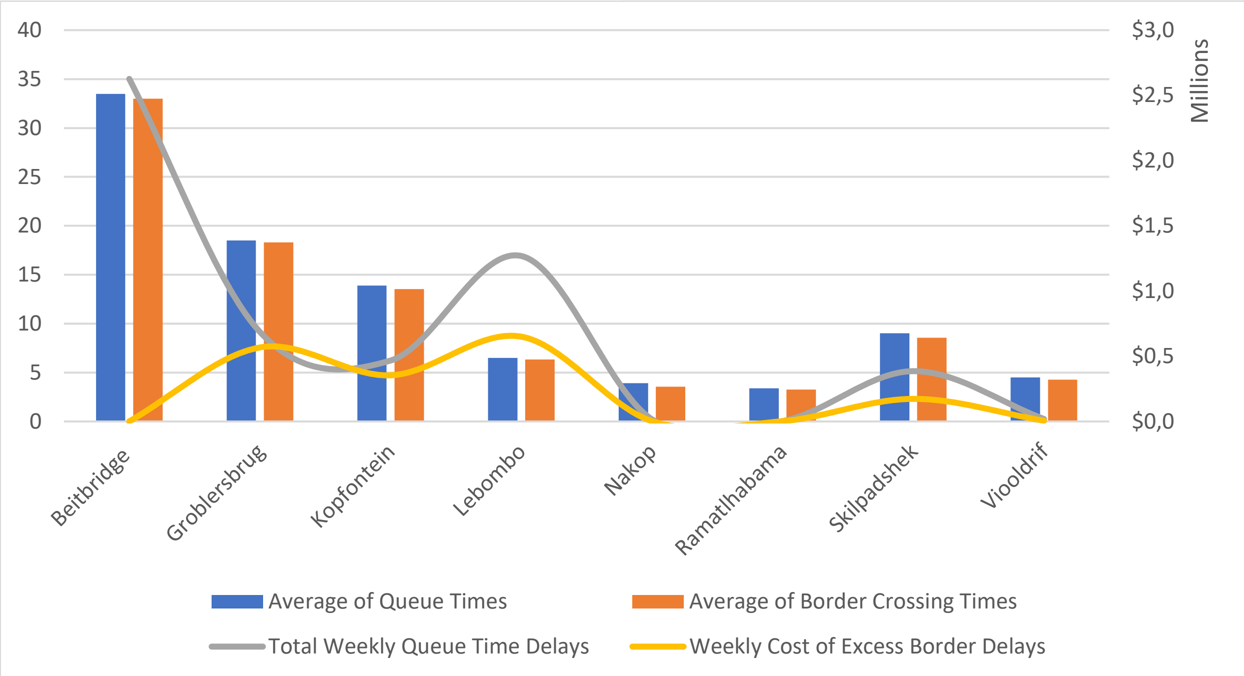
[6] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[7] Note: From this week onwards, bi-directional flows through the 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.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Trans Caprivi Corridor	924	4,0	0,7	3,6	27 720	6 468
Trans Cunene Corridor	100	3,0	0,6	2,8	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700
Trans Oranje Corridor	116	14,3	1,9	14,2	3 480	812
Sum/Average	**13 353**	**7,0**	**1,2**	**7,0**	**408 600**	**95 340**

Source: TLC, FESARTA, & Crickmay, week ending 12/10/2025.

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

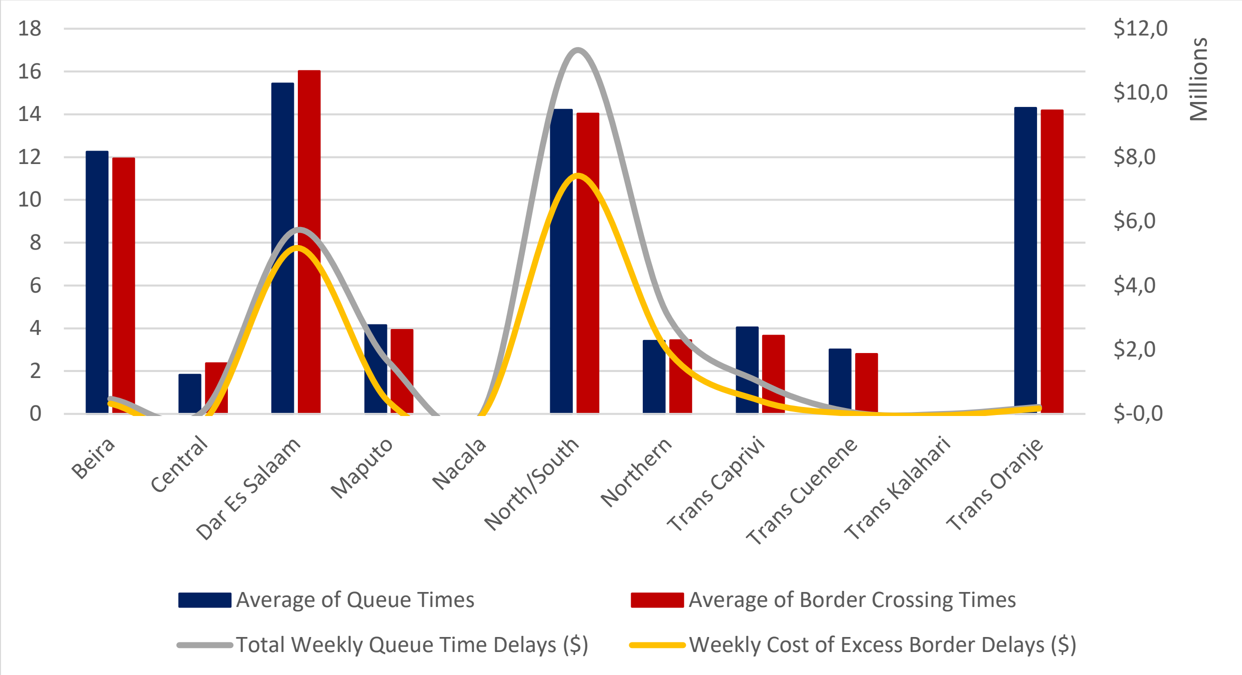
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 12/10/2025.

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 12/10/2025.

In summary, cross-border queue time averaged **~7,0 hours** (down by **~0,4 hours** from the previous week's **~7,5 hours**), indirectly costing the transport industry an estimated **$23,5 million** (**R408 million**). Furthermore, the week's average cross-border transit times also hovered around **~7,0 hours** (down by **~0,3 hours** from the **~7,3 hours** recorded in the previous report), at an indirect cost to the transport industry of **$15,5 million** (**R268 million**). The total indirect cost for the week amounts to an estimated **~$39 million** (**R676 million**, down by **↓13%** from the **~R778 million** in the previous report).

4. International Update

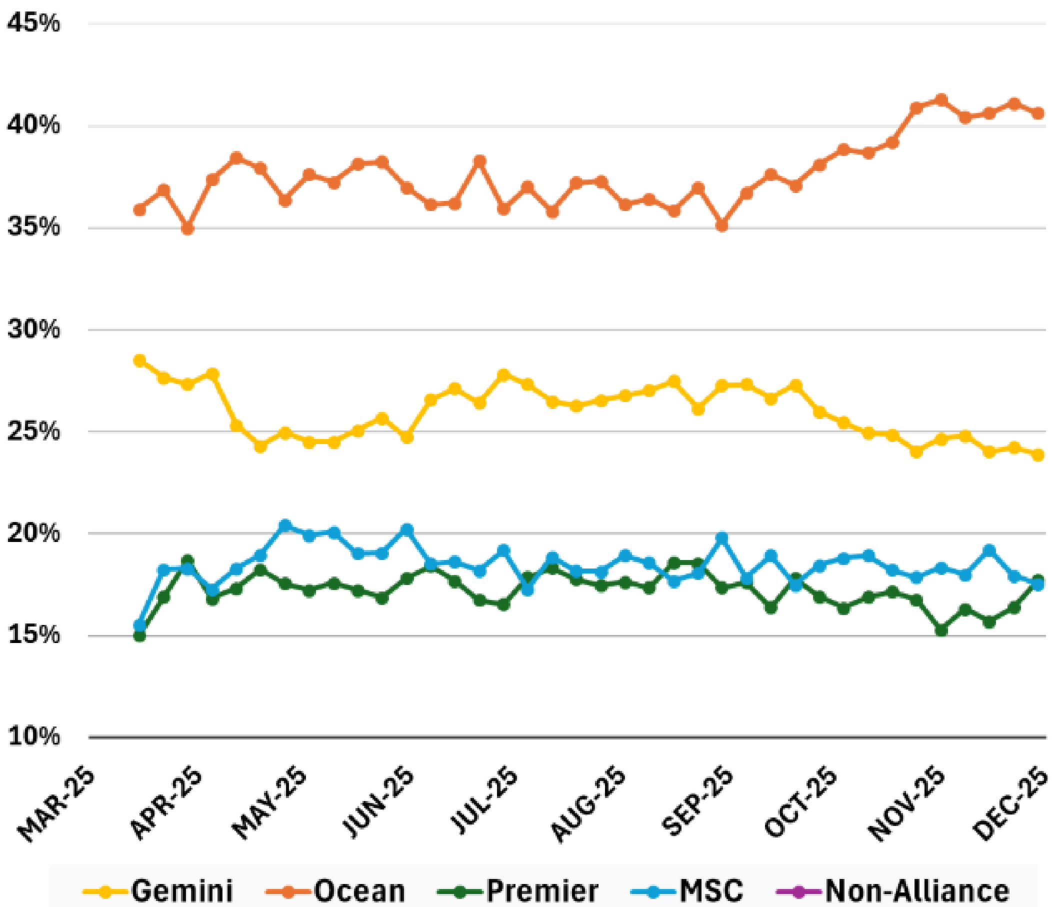
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Capacity: Ocean Alliance consolidating dominance

Sea Intelligence this week shows that the Ocean Alliance is not only leading the major East-West shipping trades but actively consolidating its dominance. On the Asia–North Europe lane, its operating capacity share is projected to rise from the **mid-30% range** (36-38%) to **around 41%** by December. Simultaneously, the traditionally second-placed Gemini Cooperation is expected to fall from **~27%** down to **24-25%**, shifting the competition for second through fourth positions into a tight scramble. On the Transpacific routes, Ocean Alliance is forecast to reach about **37%** share on the Asia–North America West Coast trade, and **38-40%** on the East Coast trade – creating a gap of nearly **20 percentage-points** over any single rival. Only the Asia-Mediterranean lane remains more fragmented, though even there, Ocean Alliance is set to attack the current leader.

Figure 15 – Asia-NEUR capacity market share (%)



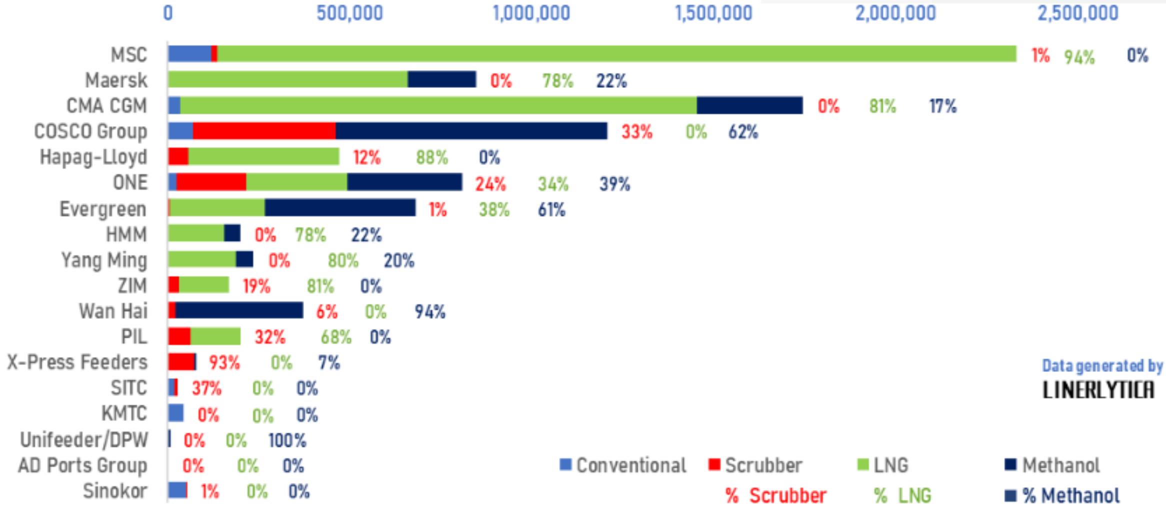
Source: Sea Intelligence

ii. IMO Marine Environment Protection Committee

Member states of the IMO voted **57–49** on 17 October 2025 to adjourn the meeting of the Marine Environment Protection Committee (MEPC) for one year, thereby postponing the adoption of the "*Net-Zero Framework*" (NZF).[9] This delay injects additional investment uncertainty for new containership orders, even though tonnage contracting remains strong (owners added an extra **~240 000 TEU** in the past two weeks). Operators and owners ahead in green-fuel uptake – notably LNG or methanol-capable tonnage (**78%** of the current orderbook) – will tend to benefit; the postponement favours transitional fuels (like LNG) and carriers with older fleets (such as MSC's example, where **~94%** of its orderbook is LNG-powered). Interestingly, China, Korea and Japan account for **98,5%** of the container ship orderbook. Elsewhere, Taiwan (16 ships), Turkey (4), the US (3), and India (2) each have several container ships under construction. Similarly, there are a few very small vessels on order from yards in Azerbaijan, Indonesia and Pakistan.[10]

[9] IMO. 17/10/2025. IMO net-zero shipping talks to resume in 2026.
[10] Alphaliner. 22/10/2025. China, Korea and Japan account for 98.5% of the container ship orderbook.

Figure 16 – Orderbook breakdown: Top 18 carriers (capacity in TEU)



Source: Linerlytica

iii. Container industry summary

Elsewhere in the industry, ongoing geopolitical and operational tensions have persisted. The US–China trade spat deepened as Beijing imposed reciprocal port fees on American carriers, although analysts note minimal disruption to trade flows so far.[11] Meanwhile, European port operations faced renewed strain, with strikes at Antwerp and Rotterdam temporarily resolved but leaving shippers wary of further disruptions amid congestion and capacity pressures.[12] At the same time, carriers announced new general rate increases (GRIs) and surcharges – ostensibly to offset rising port and handling costs – adding uncertainty for shippers already contending with fluctuating freight indices (see the analysis below) and soft underlying demand. Lastly, *Linerlytica* further highlighted the fragile balance in global container flows, noting that operational bottlenecks, particularly in Europe and Asia, could quickly reverse recent stabilisation trends in freight rates.[13]

iv. Global freight rates

The primary index we track, the Drewry "*World Container Index*", ticked up by **↑2,2%** (or **$36**) to **$1 687 per 40-ft container** this week, marking the first rise after 17 consecutive weeks of decline.[14] However, the Containerised Freight Index (SCFI) recorded a much sharper move, increasing by around **↑13%** week-on-week, although the lack of underlying cargo volume casts doubt on the sustainability of that uptick.[15] The massive divide between spot rates and charter rates has also finally begun to move back closer to each other, as the *Harper Petersen Index* (Harpex) was down again last week and is now trading around **2 185 points** on Friday, which is **↓1,4%** below the peak achieved during the second week of September.[16] The following combination graph of the two shows the divergent trends across the last 12 months:

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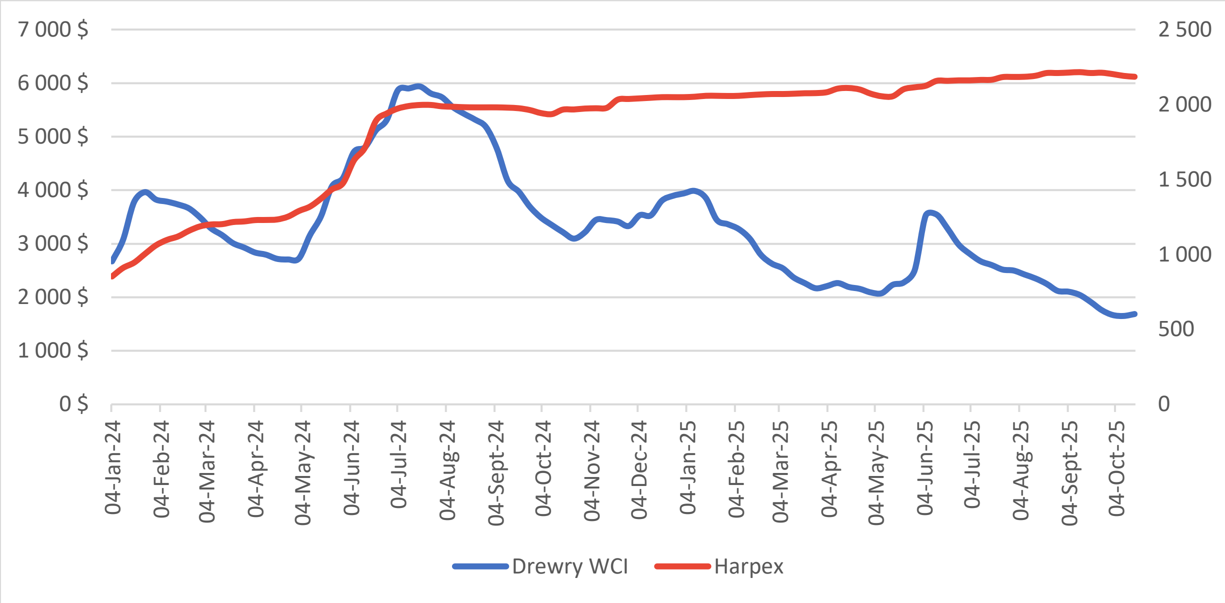
[11] Koo, A. 21/10/2025. No major impact from China's 'tit-for-tat' port fees for US Liners.
[12] Van Marle, G. 15/10/2025. Antwerp and Rotterdam port strikes end – at least until Friday.
[13] Linerlytica. 20/10/2025. Market Pulse – Week 42.
[14] Drewry. 16/10/2025. World Container Index.
[15] Linerlytica. 20/10/2025. Market Pulse – Week 42.
[16] Harpex. 17/10/2025. Harper Petersen Index.

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



Source: [Drewry]

b. Global air cargo industry

According to high-frequency metrics from World ACD, global air cargo volumes softened again in week 41 (6–12 October), declining by **~↓3%** week-on-week, mainly due to seasonal disruptions across Asia. The *Golden Week* holidays in China, together with public holidays in Taiwan and South Korea, curtailed regional tonnages by **~↓9%**, with China and Hong Kong down **↓13%** and **↓6%**, respectively. Without these temporary effects, global volumes would have shown marginal growth of around **↑1%** week-on-week.

Figure 18 – Capacity, chargeable weight and rates (last two to five weeks, % change)

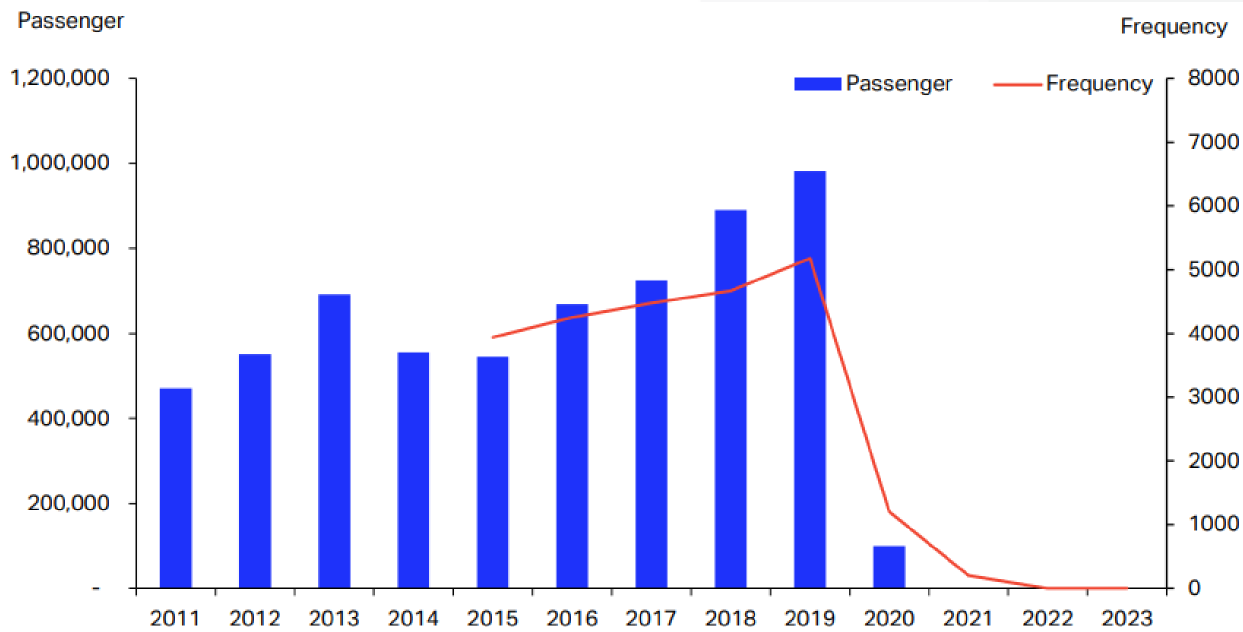
Origin Regions last 2 to 5 weeks	Capacity[1]			Chargeable weight[1]			Rate[1]		
WORLD ACD	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-1%	+9%		-3%	-2%		+0%	+3%
Asia Pacific		+1%	+3%		-4%	+4%		+3%	-6%
C. & S. America		+3%	+7%		+1%	+1%		+1%	-4%
Europe		-0%	+3%		-2%	-1%		+3%	+4%
M. East & S. Asia		+1%	+6%		-5%	-2%		-1%	-21%
North America		+2%	-0%		-1%	+2%		-1%	-1%
Worldwide		+1%	+3%		-3%	+2%		+2%	-4%

Source: [World ACD]

In terms of pricing, air freight rates from China to the US – arguably the most important lane – fell for the second consecutive week by **↓7%**, reaching **$4,07/kg**, now **↓20%** below last year's level. Meanwhile, flows from Hong Kong to the US were relatively stable, with rates down just **↓1%** week-on-week and slightly higher year-on-year. Broader tonnages across weeks 40–41 remained **↑4%** above 2024 levels, reflecting underlying resilience amid capacity normalisation and muted demand in e-commerce corridors. Ultimately, emerging geopolitical dynamics – most notably the potential escalation of US–China tariff measures and rare-earth export restrictions – may influence volumes and rates in the coming weeks.

In other aviation news, IATA reports that direct passenger flights between China and India – the world's two most populous nations – will resume on 26 October 2025 after a five-year suspension. This reopening marks a strategic step to re-establish connectivity on a corridor which had doubled passenger volumes from 2011 through 2019 and is poised to unlock further intra-Asia travel, tourism and trade flows.

Figure 19 – Bi-directional passenger and flight numbers between China and India (2011-2023)



Source: IATA

Lastly, an empty Boeing 747-400 BDSF freighter operating on behalf of Emirates SkyCargo collided with a patrol vehicle while landing at Hong Kong International Airport (HKIA), resulting in the deaths of two ground-crew members.[17]

ENDS[18]

[17] Clermont, A. 20/10/2025. Two killed as 747 freighter strikes patrol vehicle while landing at HKIA.

[18] **ACKNOWLEDGEMENT:**

*This initiative – **The Cargo Movement Update** – was developed collectively by the Private Sector at large to provide visibility of the movement of goods during the COVID-19 pandemic. The report is authored by the Southern African Association of Freight Forwarders (SAAFF) and distributed by Business Unity South Africa (BUSA). SAAFF acknowledges the input of several key business partners in compiling these reports, which have become a weekly industry staple.*