Authored by:
www.saaff.org.za

Distributed by:
www.busa.org.za

Cargo Movement Update #241[1]

Date: 6 July 2025

Weekly Snapshot

Table 1 – Port volumes and air cargo flows, week on week

Flows	Current[2]			Previous[3]			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	45 590	51 939	**97 487**	41 004	46 715	**87 719**	↑11%
Air Cargo (tons)	4 198	2 579	**6 777**	3 797	2 102	**5 898**	↑15%

Monthly Snapshot

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

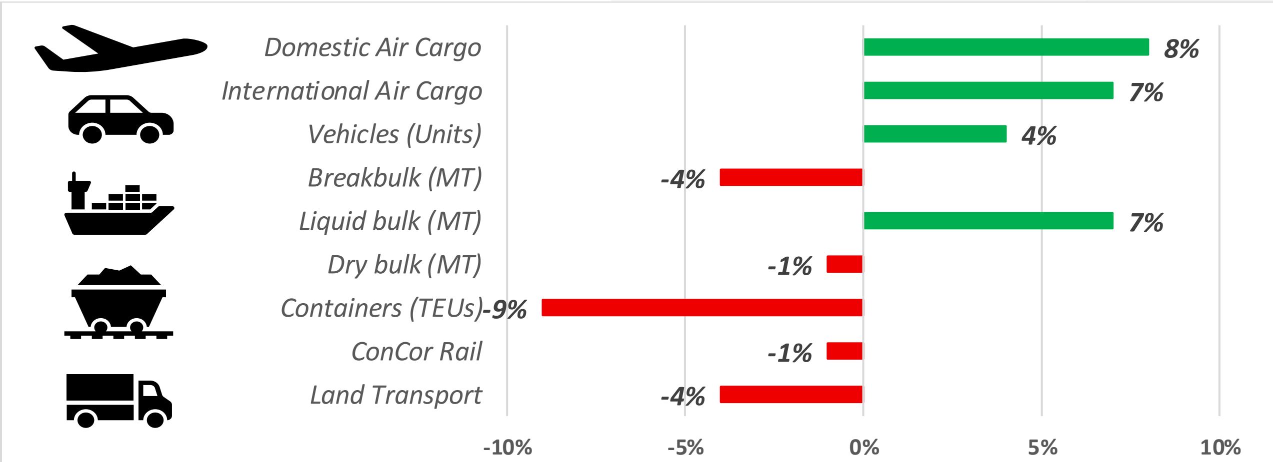
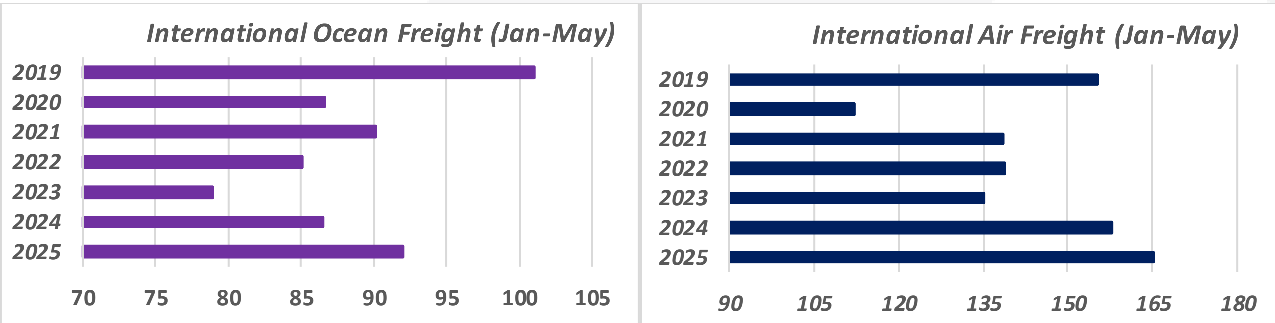


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~13 933 TEUs** was handled per day, with **~12 609 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 448** containers, up by **↑1%** from last week.
- Cross-border queue: **↑1,4**; transit: **↑1,3 hrs**; SA borders: **11,2 hrs** (**↑17%**); SADC: **4,7 hrs** (**no change**).
- UNCTAD: Global trade grew by **↑1,5%** (Q1) & **~↑2%** (Q2) to expand by **~$300 billion** despite uncertainty.
- Global spot rates declined for a 3rd consecutive week (by **↓5,7%**, or **$171**) to **$2 812/40ft**.
- Global air cargo was **↑2%** higher year-on-year in June, as rates are up **↑2%** (m/m) but down **↓1%** (y/y).

---

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *241st* 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: May vs May.
[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, another record high average of **13 933 TEUs** was handled daily, increasing from **12 531 TEUs** the previous week. Despite the record throughput, some delays were still experienced because of adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages. The Port of Cape Town experienced more than 30 operational hours of downtime due to adverse weather this week, while the main operational constraints in Durban were continuous equipment breakdowns, adverse weather, and congestion. Poor weather, vessel ranging, and vacant berths mainly impacted operations at our Eastern Cape Ports, as inclement weather conditions also ensured operational delays at the Port of Richards Bay. The latest reports from TFR suggest that intermittent cable theft incidents still occurred on the Central Corridor this week. However, trains are still moving on the line. Additionally, operations on the line between City Deep and Mafikeng were delayed for around 2-3 days due to a shortage of working diesel locomotives.

In H1 2025, global trade in goods and services expanded by **~↑1,5%** in Q1 and **~↑2%** in Q2, supported by higher prices and modest volume growth (**~↑1%**). The update from UNCTAD echoes a recent update from the WTO. The WTO's "*Goods Trade Barometer*" climbed to **103,5** in June, up from **102,8** in March, indicating above-trend goods trade, primarily driven by importers' "*frontloading*" ahead of anticipated tariff hikes. Developed economies led this expansion, with notable growth in US imports and EU exports, despite widening trade imbalances. Persistent tariff uncertainty, geopolitical tensions, and protectionist measures – particularly new US tariffs (including a **30% duty on South African goods** from 9 July) – pose major headwinds. UNCTAD and WTO warn of mounting barriers and call for negotiated solutions to avert escalation. Meanwhile, container shipping capacity rose **↑3,8%** (**1,18 million TEU**), driven by MSC's expansion. Despite this, container spot rates continue to fall, reflecting weak demand against the elevated freight levels.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~600 000 kg** inbound (**↑11%**, w/w) and **~370 000 kg** outbound (**↑23%**). The uptick this week against the slump of the last two weeks means that cargo is again trending above the same level as last year (**↑15%**, y/y) and the comparative levels of pre-pandemic 2019 (**↑7%**). Internationally, global air cargo tonnages in June 2025 were **↑2%** higher year-on-year, though they fell **↓4%** compared to May, indicating seasonal softening amid overall annual growth. In June 2025, global air cargo rates rose **↑2%** month-on-month but remained **↓1%** below June 2024 levels. Average worldwide air cargo rates rose by **↑2%** in June (m/m), taking them **↓1%** below their level in June 2024.

Cargo movements along the N4 corridor decreased slightly for road transport, as cargo previously transported via rail returned after the recent shutdown. This week, truck volumes through the border post were **1 564 HGVs per day** (**↓5%**, w/w). Queue times increased to an average of **4,4 hours** (**↑10%**) at the border, as the average processing time also increased to around **4,3 hours** (**↑19%**) per crossing.

Land border crossing times increased at South African borders while remaining primarily unchanged throughout the rest of the SADC region. Overall, the average queue time increased by approximately **an hour and a half** from last week, while transit time increased by around **an hour and a quarter**. The median border crossing times at South African borders increased by **an hour and a half**, averaging **~11,2 hrs** (**↑17%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**). On average, four SADC borders took more than a day to cross last week, namely Beitbridge, Kasumbalesa (the worst affected, with an average of **two days** from **the Zambian side**), Katima

Mulilo, and Zobue/Mwanza OSBP. Other developments include **(1)** the shutdown of the illegal SADC Truck Drivers Association fee at Kasumbalesa following government intervention, **(2)** improved efficiency at Groblersbrug contrasting with ongoing frustrations at Beitbridge, **(3)** the operational launch of Lesotho's Registered Agent Program, and **(4)** a temporary road closure on the N1 between Colesberg and Hanover due to an LPG truck overturning.

This record week in container throughput – averaging nearly **14 000 TEUs** per day – highlights the targeted synergy emerging in operations, improved equipment complement in key terminals, and the broader need for ongoing market restructuring and reform in our industry. Transnet and labour must be applauded for their collaborative efforts to improve operational performance and throughput under challenging conditions. Yet these gains face clear threats from policy and practical misalignment in restructuring processes, notably legislative proposals such as the *Merchant Shipping Bill*. The Bill's discretionary cargo designation and Section 69's mandatory industry-promotion mandate create legislative risks of imposing substantial, unquantifiable costs on trade without enforceable safeguards. By embedding these powers without clear economic thresholds or implementation criteria, the Bill risks legally enabling policies that the logistics system cannot practically absorb, undermining competitiveness and supply chain stability. Getting these reforms right is essential, given the intensifying global headwinds surrounding tariffs, trade, and policy uncertainty, as logistics is a vital enabler of sustained economic growth.

Contents

Weekly Snapshot **1**

Monthly Snapshot **1**

Key Notes **1**

Executive Summary **2**

Contents **4**

1. Ports Update **5**

a. Container flow overview 5

b. Summary of port operations 7

i. Weather and other delays 7

ii. Cape Town 7

iii. Durban 8

iv. Richards Bay 10

v. Eastern Cape ports 10

vi. Transnet Freight Rail (TFR) 11

2. Air Cargo Update **11**

a. International air cargo 11

b. Domestic air cargo 12

3. Road and Regional Update **12**

a. Lebombo border post update 12

b. SADC cross-border and road freight update 13

4. International Update **17**

a. Global trading industry and tariffs 17

b. Global shipping industry 18

i. Global carrier capacity growth 18

ii. Global freight rates 19

c. Global air cargo industry 20

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 30 June to 6 July (measured in TEUs)

7-day flow reported (30/06/2025 – 06/07/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 349	37 442	↑7%
New Pier (Pier 1)	2 510	17 568	↑8%
Cape Town Container Terminal	1 941	13 589	↑16%
Ngqura Container Terminal	2 206	15 445	↑6%
Port Elizabeth Container Terminal	633	4 433	↑17%
Other	1 293	9 052	↑42%
Total	**13 933**	**97 529**	↑11%

Source: Calculated from TPT, 2025. Updated 06/07/2025.

A record average of **~13 933 TEUs** (↑11%) was handled per day for the last week (*30 June to 6 July, Table 2*), significantly above the projected average of **~12 275 TEUs** (↑14% actual versus projected).

For the coming week, a slightly decreased average of **~12 609 TEUs** (↓9%) is predicted to be handled (7 *to 13 July, Table 3*). Despite the record throughput, some delays were still experienced because of adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages.

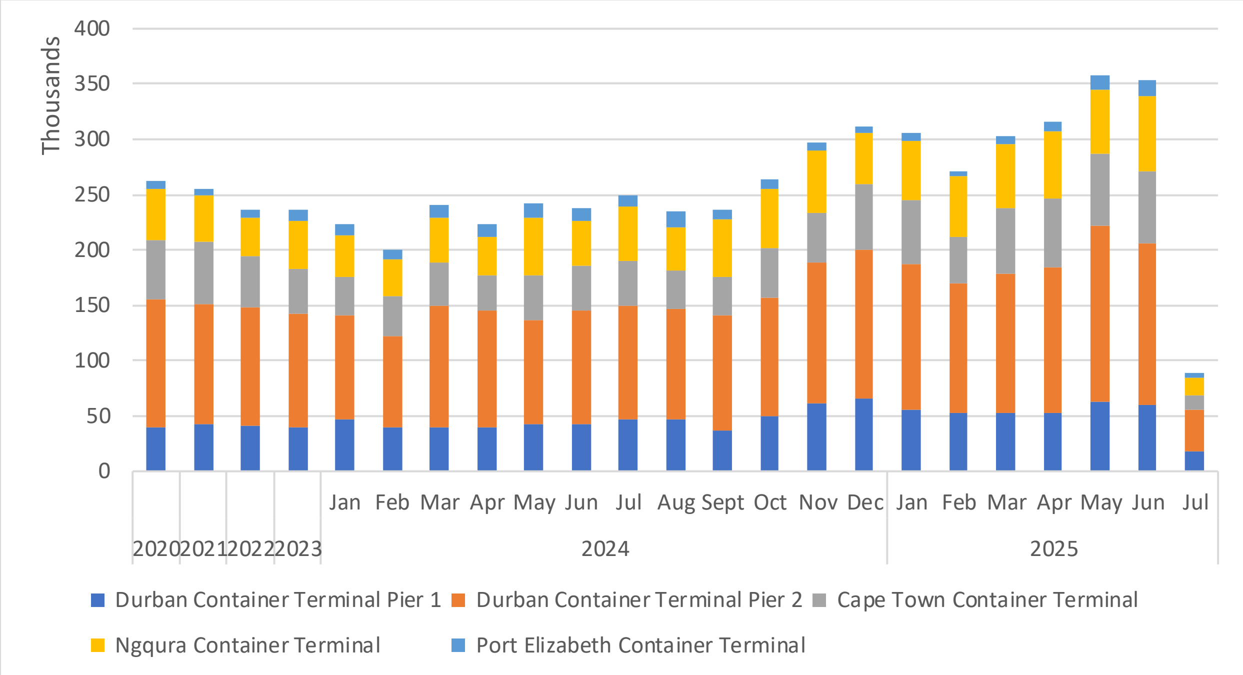
Table 3 – Container Ports – Weekly flow projected for 7 to 13 July (measured in TEUs)

7-day flow projected (07/07/2025 – 13/07/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 408	37 856	↑1%
New Pier (Pier 1)	2 073	14 511	↓17%
Cape Town Container Terminal	1 755	12 283	↓10%
Ngqura Container Terminal	2 059	14 414	↓7%
Port Elizabeth Container Terminal	499	3 496	↓21%
Other	815	5 704	↓37%
Total	**12 609**	**88 264**	↓9%

Source: Calculated from TPT, 2025. Updated 06/07/2025.

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.

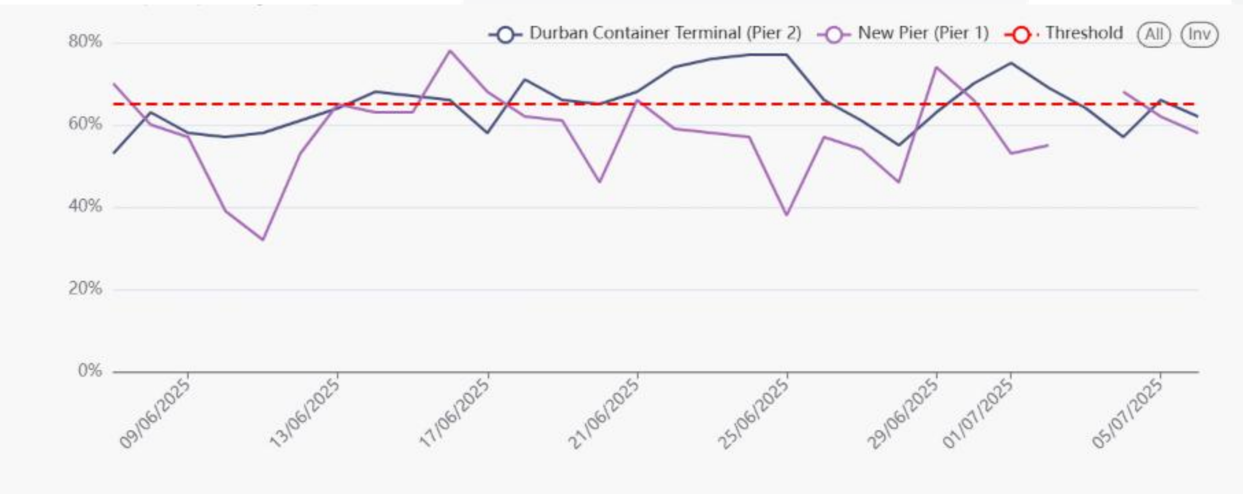
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 06/07/2025.

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

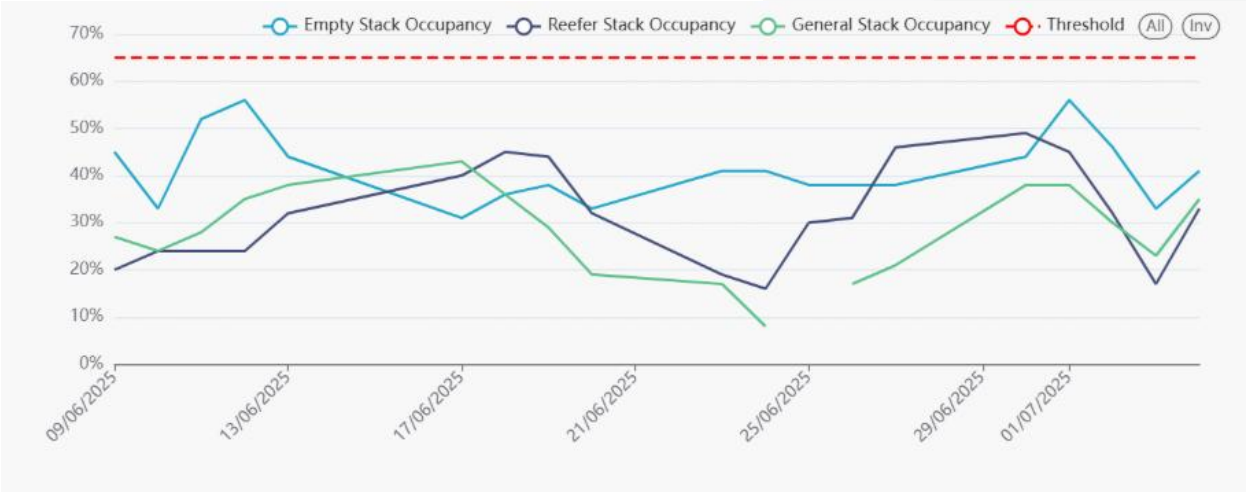
Figure 4 – Stack occupancy in DCT, general-purpose containers (9 June to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 06/07/2025.

The following figure shows daily stack occupancy in Cape Town over a similar period.

Figure 5 – Stack occupancy in CTCT, GP, reefer, and empty stack (9 June to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 06/07/2025.

b. Summary of port operations

i. Weather and other delays

- The Port of Cape Town conceded more than 30 operational hours to adverse weather this week.
- The main operational constraints in Durban proved to be continuous equipment breakdowns, adverse weather, and congestion.
- Inclement weather, vessel ranging, and vacant berths mainly impacted operations at our Eastern Cape Ports.
- Inclement weather conditions ensured operational delays at the Port of Richards Bay.

ii. Cape Town

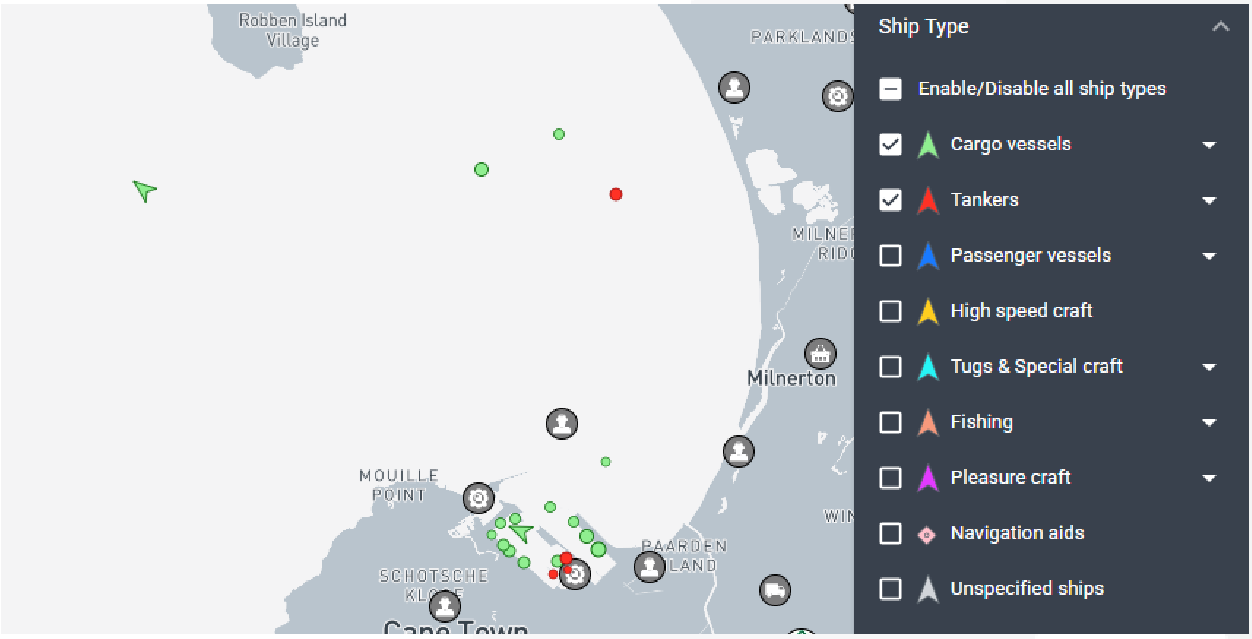
On Friday, CTCT recorded three vessels at berth and none at anchor, as adverse weather and equipment challenges proved to be the primary operational constraints at the port. On the landside, between Monday and Friday, the terminal managed to service at least 5 041 trucks while handling approximately 100 rail units. On the waterside, the terminal executed approximately 5 506 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 35%**, **reefers at 33%**, and **empties at 41%**. Additionally, the terminal operated with **eight STS cranes**, **22 RTGs**, and **56 hauliers** towards the end of the week.

On Friday, CTMPT recorded two vessels at berth and one at outer anchorage. In the preceding 24 hours, the terminal successfully handled 645 tons and 381 container moves on the waterside, despite operations being impacted by rainy weather for approximately 23 hours. On the landside, 288 trucks were processed during the same period. Stack occupancy was recorded at 42% for general cargo, 8% for reefers, and 6% for empties. Towards the end of the week, the terminal operated with three cranes and four straddle carriers.

The latest reports from Maersk suggest that the CF Athena 532W will be phased into the AMEX service in Cape Town, while the AS Stine 530N will be phased into the 163 service in Cape Town. Additionally, the Maersk Cap Carmel 528E will also be phased into the AMEX service in Cape Town, with the Maersk Vallvik 528N to be phased into the 163 service in Cape Town.

Between 23 and 29 June, the FPT terminal handled seven vessels: four multi-cargo, two dry bulk, and one container vessel. Berth occupancy during this period was recorded at 65%. The terminal planned to handle nine more vessels between 30 June and 6 July, with another five vessels scheduled between 7 and 13 July. Inclement weather, as well as the late arrival of cargo, accounted for the most significant operational constraints during this period.

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



Source: Marine Traffic. Updated 06/07/2025 at 14:00.

iii. Durban

The latest reports from Maersk suggest that the Mona Lisa 529W and Irenes Rule 528 W will undergo a sequence change as the Mona Lisa advanced one week earlier in Durban Pier 1, with the Irenes Rule 528W sailing one week later in Durban Pier 1. All Irenes Rule 528W exports will be moved to Mona Lisa 529W and vice versa.

Pier 1 On Friday, Pier 1 recorded two vessels on berth, with one vessel at anchor. Stack occupancy was **68%** for **GP containers** and **30%** for **reefers**. Between Monday and Friday, the terminal executed at least 6 180 gate moves and 352 rail moves on the landside. The **average TTT** for the week was **~50 minutes** (**↑20%**, w/w) and an average **staging time** of **~30 minutes** (**↑36%**). Additionally, the terminal moved over 7 978 TEUs across the quay on the waterside during the same period. The terminal had **six STS cranes** and **16 RTGs** available towards the end of the week.

Pier 2 had three vessels on berth and three at anchorage on Friday, as equipment breakdowns, adverse weather, and congestion prevented optimal operational performance this week. Stack occupancy was recorded at **47%** for **GP containers** and **49%** for **reefers**. The terminal operated with **12 gangs** and moved over **18 600** containers across the quay between Monday and Friday on the waterside. Approximately 12 879 gate moves were executed on the landside during the same period. The **average TTT** for the week was **~50 minutes** (**↑20%**, w/w) and an average **staging time** of **~30 minutes** (**↓36%**). Approximately 1 654 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **72** and **75** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **84%** during this period. Towards the end of the week, the most notable crane absentees were Cranes 520, 524, and 528; however, these machines were anticipated to return to operations before the weekend.

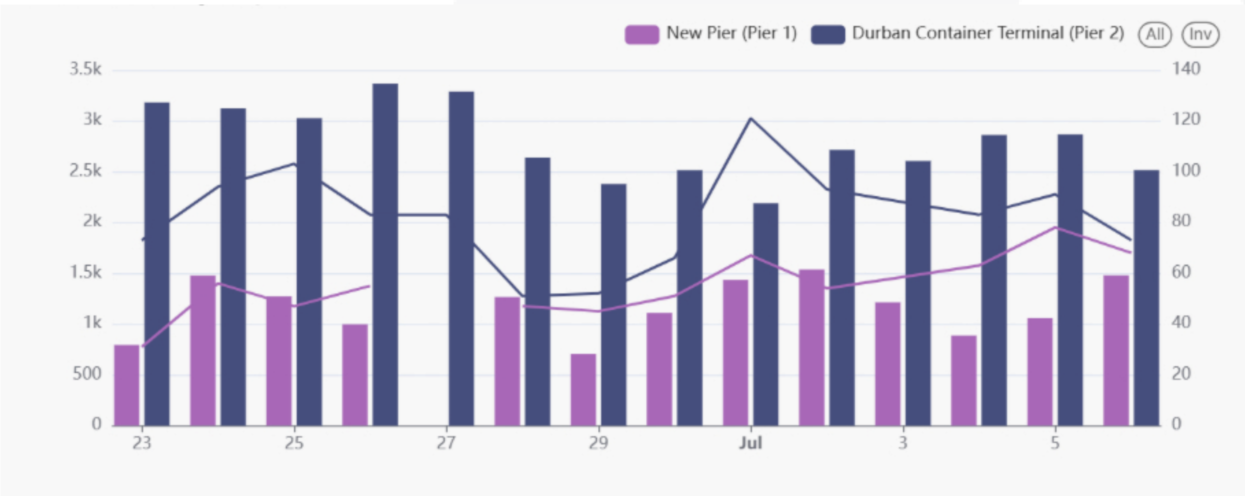
Durban's MPT terminal recorded two vessels at berth on Friday and none at outer anchorage. Stack occupancy for containers was recorded at 26%, the reefer stack at 47%, and the breakbulk stack at 90%. In the preceding 24 hours, 351 containers and 3,180 tons of breakbulk were handled on the waterside. On the landside, 401 container trucks were serviced at a TTT of ~40 minutes. Additionally, 101 breakbulk trucks, containing 2 578 tons, were serviced. During this period, three cranes, eight reach stackers, seven forklifts, and 20 ERFs were in operation. The latest reports from TPT suggest that the fourth crane is only scheduled to return to service around 21 December.

Between Thursday and Friday, the Maydon Wharf MPT recorded one vessel at berth and zero at anchorage. On the waterside, the terminal managed to handle 6 652 tons, while 16 trucks, containing approximately 1 004 tons, were serviced on the landside. During the same period, the agri-bulk facility recorded zero vessels at berth and none at anchor. The terminal managed to handle 2 371 tons on the waterside and zero trucks on the landside.

On Friday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with none at anchorage. In the preceding 24 hours, the terminal handled 1 147 road units and 185 units on rail on the landside while 2 599 units were handled on the waterside. Overall stack occupancy was 52%, 70% at Q&R, and 40% at G-berth. During this period, the terminal had 155 high-and-heavy (abnormal loads) on hand and managed to handle 28.

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.

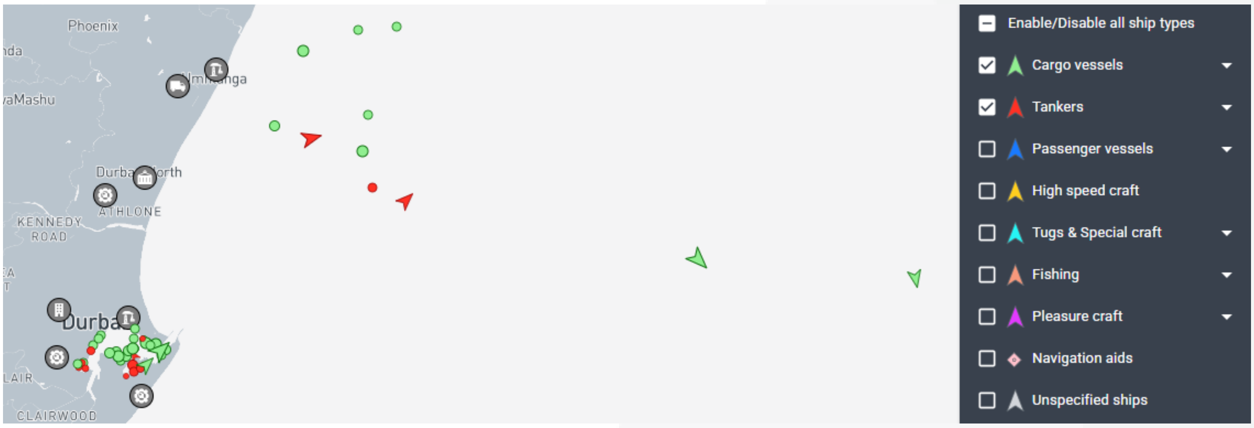
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 06/07/2025.

The queue of container vessels waiting outside Durban has decreased slightly from last week. On Monday evening (6 July), **no** container vessels were waiting outside at anchorage for Pier 1, **one** for Pier 2, and **two** for Point. The queue of dry (**four**), liquid (**three**), and breakbulk (**two**) vessels has decreased slightly from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 06/07/2025 at 14:00.

iv. Richards Bay

On Wednesday, the Port of Richards Bay had two vessels at anchor and six on the berth, translating to one vessel at DBT, four at MPT, zero at RBCT, and one at the liquid bulk terminal. During this period, the port conceded seven operational hours due to adverse weather. Two tugs and one pilot boat operated for marine resources towards the end of the week. The helicopter went out of commission during this period, with no ETR communicated yet.

The daily average coal throughput for the week decreased again to around **128 000 tons** (**↑8%**, w/w), as some high days were offset with some low days. An improved average of **18 trains** (up by **five** from last week) were serviced on the landside, slightly below the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded three vessels on berth and zero at anchor, with one vessel 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 29% for reefers, 50% for reefer ground slots, and 33% for the general stack. Despite having a vacant berth for an undisclosed period, the terminal handled approximately 2 525 TEUs and 72 reefers on the waterside. Approximately 577 trucks were processed on the landside at a TTT of ~37 minutes. Towards the end of the week, the terminal had six STS cranes, 24 RTGs, and 43 hauliers in service.

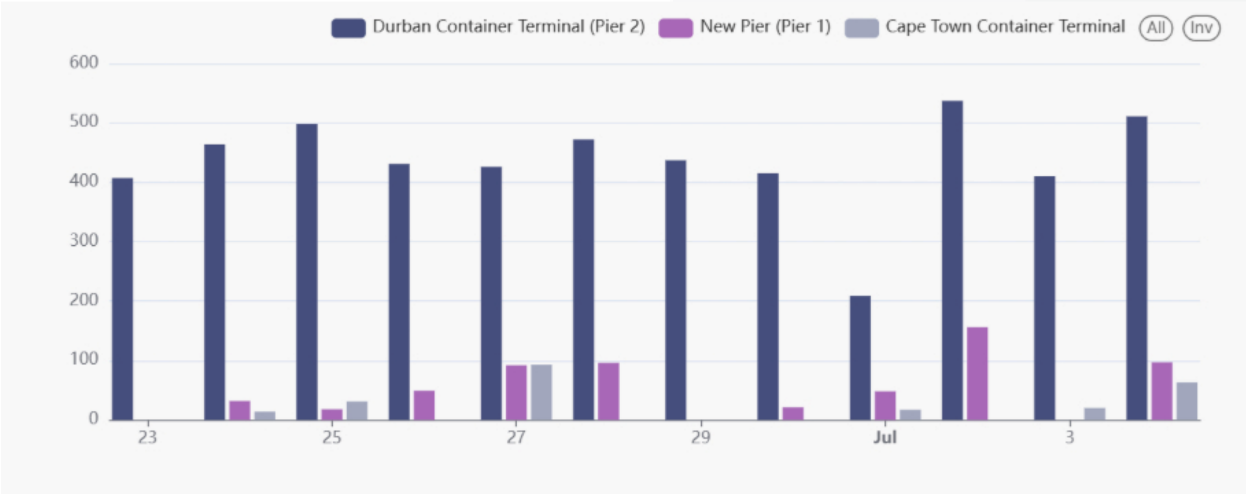
On Friday, GCT had one vessel at berth and one at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 211 trucks were processed at a TTT of ~32 minutes on the landside, while 624 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 51% for the general stack, 46% for reefers, and 40% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and nine straddles in service.

On Thursday, the Ro-Ro terminal had one vessel on berth and zero at outer anchorage. In the 24 hours before, the terminal handled 2 489 units resulting in a stack occupancy figure of 27%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that intermittent cable theft incidents still occurred on the Central Corridor this week. However, trains are still moving on the line. Additionally, operations on the line between City Deep and Mafikeng were delayed for around 2-3 days due to a shortage of working diesel locomotives. Towards the end of the week, DCT Pier 2 had 440 ConCor units on hand with a dwell time of 72 hours and 310 over-border units with a dwell time of 62 days.

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



Source: Calculated using data from Transnet, 2024. Updated 06/07/2025.

In the last week (*30 June to 6 July*), rail cargo on the ConCor line out of Durban was reported at **3 448** containers, up by **↑1%** from the previous week's **3 422** containers.

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 beginning 23 June. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *June 2024* averaged **~845 561 kg** daily.

Table 4 – International inbound and outbound cargo from OR Tambo

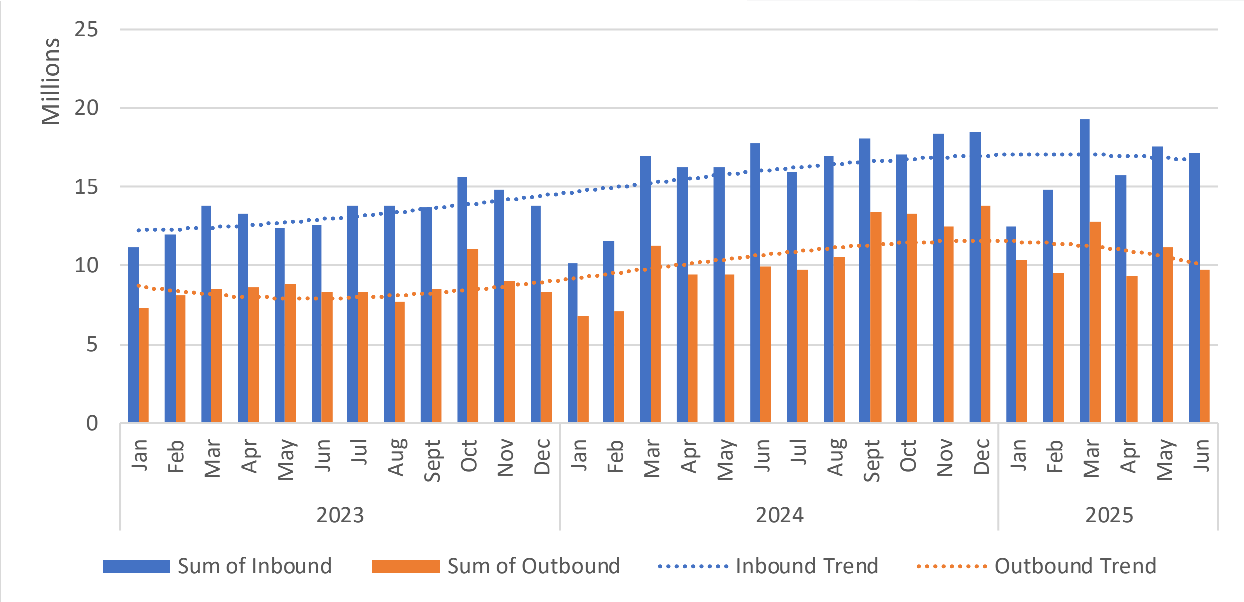
Flows	23-Jun	24-Jun	25-Jun	26-Jun	27-Jun	28-Jun	29-Jun	Week
Volume inbound	409 157	185 765	328 936	289 436	330 284	485 449	2 169 448	**4 198 475**
Volume outbound	138 444	160 383	184 581	174 114	201 308	187 506	1 532 688	**2 579 024**
Total	**547 601**	**346 148**	**513 517**	**463 550**	**531 592**	**672 955**	**3 702 136**	**6 777 499**

Courtesy of ACOC. Updated: 06/07/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~600 000 kg** inbound (**↑11%**, w/w) and **~370 000 kg** outbound (**↑23%**). The uptick this week against the slump of the last two weeks means that cargo is again trending above the same level as last year (**↑15%**, y/y) and the comparative levels of pre-pandemic 2019 (**↑7%**).

The following figure shows the international air cargo flows to and from OR Tambo since the start of 2023:

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

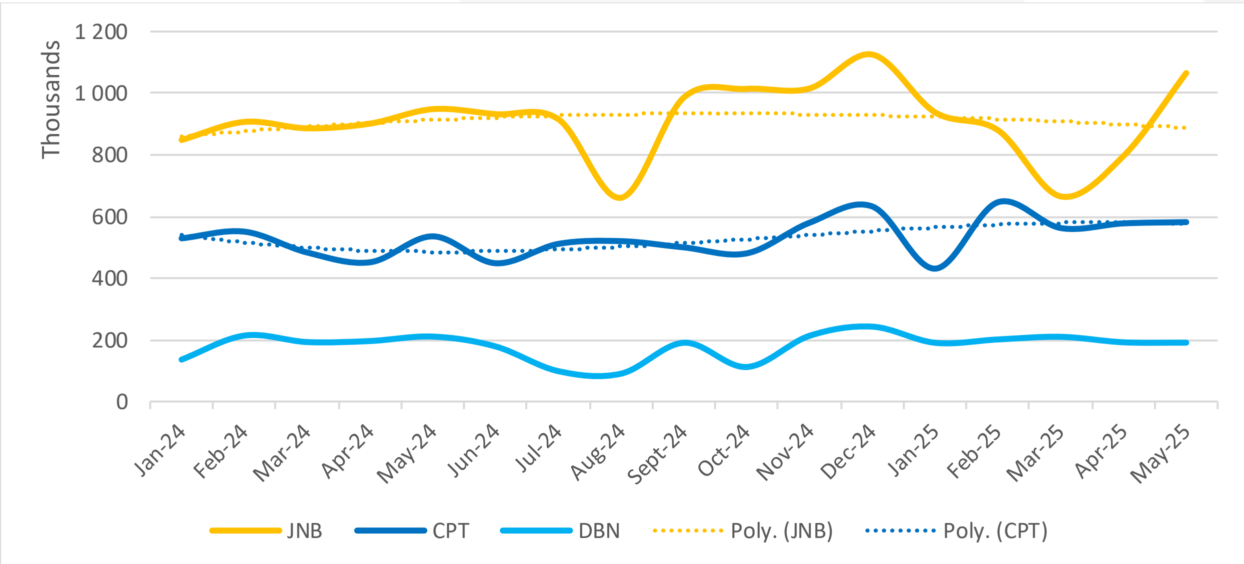


Calculated from ACOC. Updated: 06/07/2025.

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: 06/07/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*30 June to 6 July*), cargo movements along the N4 corridor decreased slightly for road, as the cargo transported via rail returned after the recent shutdown. The following notes summarise the recent developments:

- Truck volumes through the border post were **1 564 HGVs per day** (**↓5%**, w/w).
- Queue times increased to an average of **4,4 hours** (**↑10%**) at the border, as the average processing time also increased to around **4,3 hours** (**↑19%**) per crossing.

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

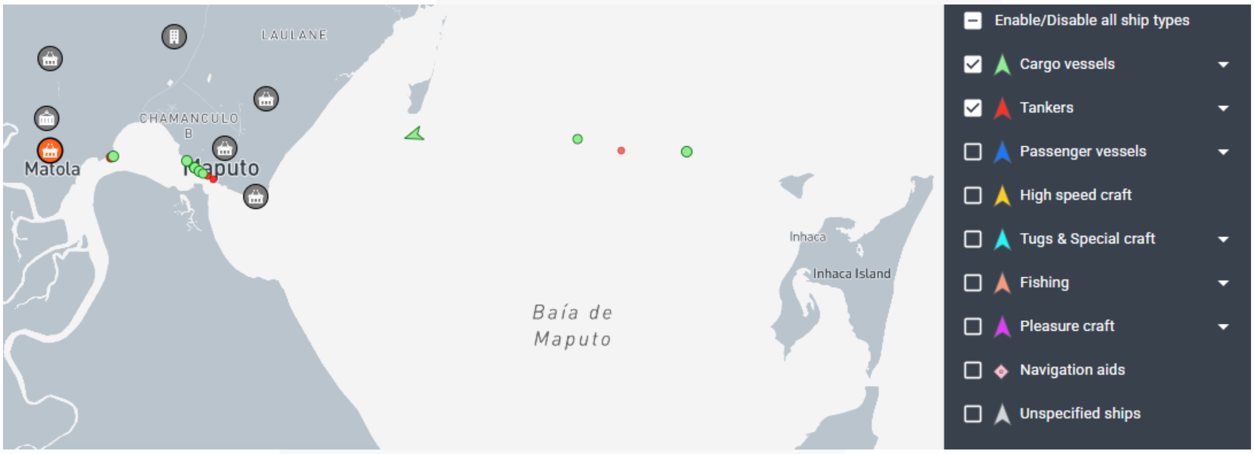
Table 5 – Lebombo border post update

Date 06h00 Daily	Total Trucks Entering KM4	Total Trucks Exit KM4	Mineral Trucks	General Cargo (incl. critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Total Trucks inside KM4 staging	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**
30-Jun-25	1 616	1 599	1 425	138	15	64	5	322	**7**	5	1	1
01-Jul-25	1 493	1 419	1 178	175	41	72	21	308	**10**	8	1	1
02-Jul-25	1 514	1 439	1 062	290	34	96	22	266	**9**	7	1	1
03-Jul-25	1 464	1 464	1 039	270	45	86	23	283	**2**	0	*	2
04-Jul-25	1 723	1 725	1 220	280	57	112	56	279	**5**	3	*	2
05-Jul-25	1 545	1 557	1 106	307	37	84	23	264	**9**	9	*	0
06-Jul-25	1 593	1 673	1 273	211	28	79	80	265	**12**	9	*	3
% of design capacity	**104%**	**104%**	**99%**	**119%**	**n/a**	**169%**	**66%**	**14%**	**39%**	**59%**	**17%**	**36%**
% change (d/d)	3%	7%	15%	-31%	-24%	-6%	248%	0%	33%	0%	**n/a**	**n/a**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 06/07/2025.
** = not reported*

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 06/07/2025 at 14:00.

b. SADC cross-border and road freight update

The following developments around cross-border road freight in South Africa and the broader SADC region are noteworthy:

- Overall, the average queue time increased by approximately **an hour and a half** from last week, while transit time increased by around **an hour and a quarter**.

- The median border crossing times at South African borders increased by **an hour and a half**, averaging **~11,2 hrs** (**↑17%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**).

1. **Kasumbalesa border post – illegal association fee:**
   a. Drivers had been forced to pay a **$5 fee** to join the so-called *SADC Truck Drivers Association* under threat of having entry cards withheld.
   b. The association was found to be illegal and has been shut down following FESARTA's intervention with the DRC government, resulting in an immediate halt to payments and refunds for amounts already paid.
2. **Groblersbrug border post improvements:**
   a. Transporters reported improved crossing times, praising SARS staff for their increased efficiency.
   b. This positive feedback was contrasted with ongoing frustrations at Beitbridge.
3. **Lesotho Registered Agent Program – positive impact:**
   a. Launched on 1 June and already has a significant operational impact.
   b. Transporters are encouraged to report disruptions.
   c. Collected evidence will be used to engage the Lesotho Revenue Authority.
4. **Road incident on the N1:**
   a. A truck carrying LPG cylinders overturned on the N1 between Colesberg and Hanover on Wednesday.
   b. Both lanes were closed for several hours.
   c. Alternate routes were advised during the closure.

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

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

Border Post	Direction	HGV[7] 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	483	25,0	6,3	25,0	14 490	3 381
Beitbridge	Zimbabwe-SA	473	12,5	2,0	12,3	14 181	3 309
Groblersbrug	SA-Botswana	225	23,8	3,0	23,5	6 750	1 575
Martin's Drift	Botswana-SA	195	2,0	0,3	2,0	5 850	1 365
Kopfontein	SA-Botswana	221	12,8	1,5	12,5	6 630	1 547
Tlokweng	Botswana-SA	19	0,6	0,2	0,4	570	133
Vioolsdrift	SA-Namibia	30	4,5	1,5	4,3	900	210
Noordoewer	Namibia-SA	20	2,1	0,3	2,0	600	140
Nakop	SA-Namibia	30	4,9	0,2	4,6	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,3	1,1	600	140

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

Border Post	Direction	HGV[7] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Skilpadshek	SA-Botswana	264	4,6	1,5	4,4	7 920	1 848
Pioneer Gate	Botswana-SA	51	0,0	0,0	0,0	1 530	357
Lebombo	SA-Mozambique	1 653	4,4	0,6	4,3	49 590	11 571
Ressano Garcia	Mozambique-SA	1 591	1,4	0,2	1,2	47 730	11 137
Sum/Average		**5 275**	**7,1**	**1,3**	**7,0**	**158 241**	**36 923**

Source: TLC, FESARTA, & Crickmay, week ending 29/06/2025.

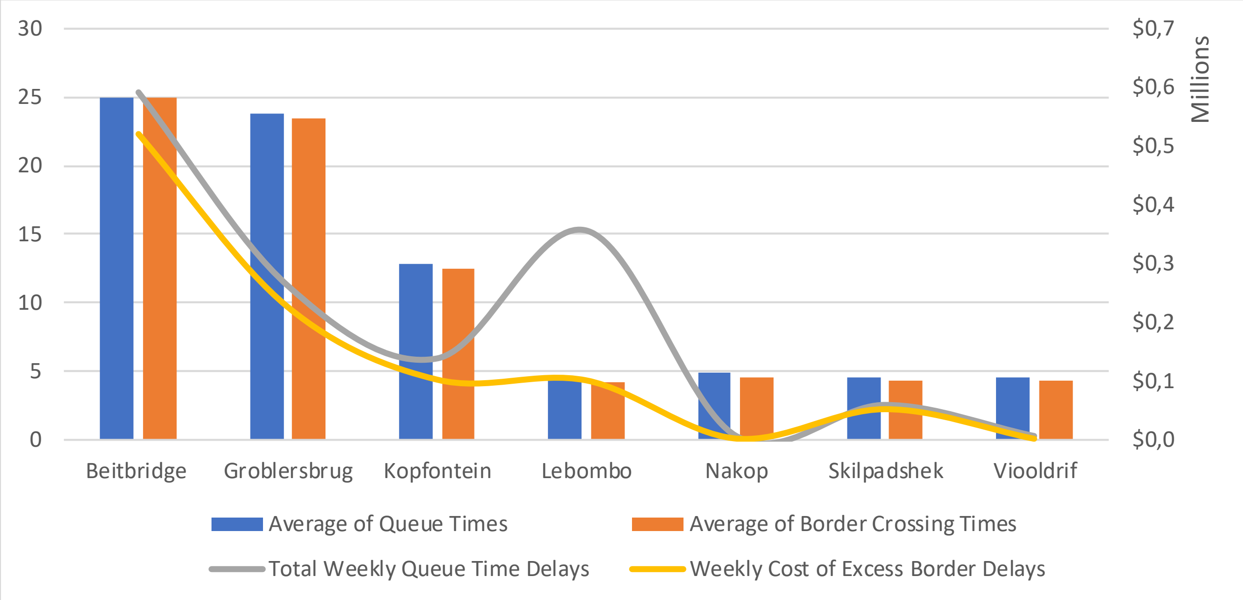
Table 7 – Delays summary – Corridor perspective

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	14,2	3,8	14,1	9 600	2 240
Central Corridor	798	0,4	0,1	0,4	23 940	5 586
Dar Es Salaam Corridor	1 819	11,6	0,9	11,5	54 570	12 733
Maputo Corridor	3 244	2,9	0,4	2,7	97 320	22 708
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 573	13,4	1,6	13,3	107 181	25 009
Northern Corridor	2 817	1,2	0,1	1,2	92 520	21 588
Trans Caprivi Corridor	345	2,2	0,6	2,0	10 350	2 415
Trans Cunene Corridor	100	3,2	0,6	3,0	3 000	700
Trans Kalahari Corridor	116	15,2	1,9	14,8	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	**13 359**	**6,1**	**0,8**	**6,1**	**408 771**	**95 380**

Source: TLC, FESARTA, & Crickmay, week ending 29/06/2025.

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

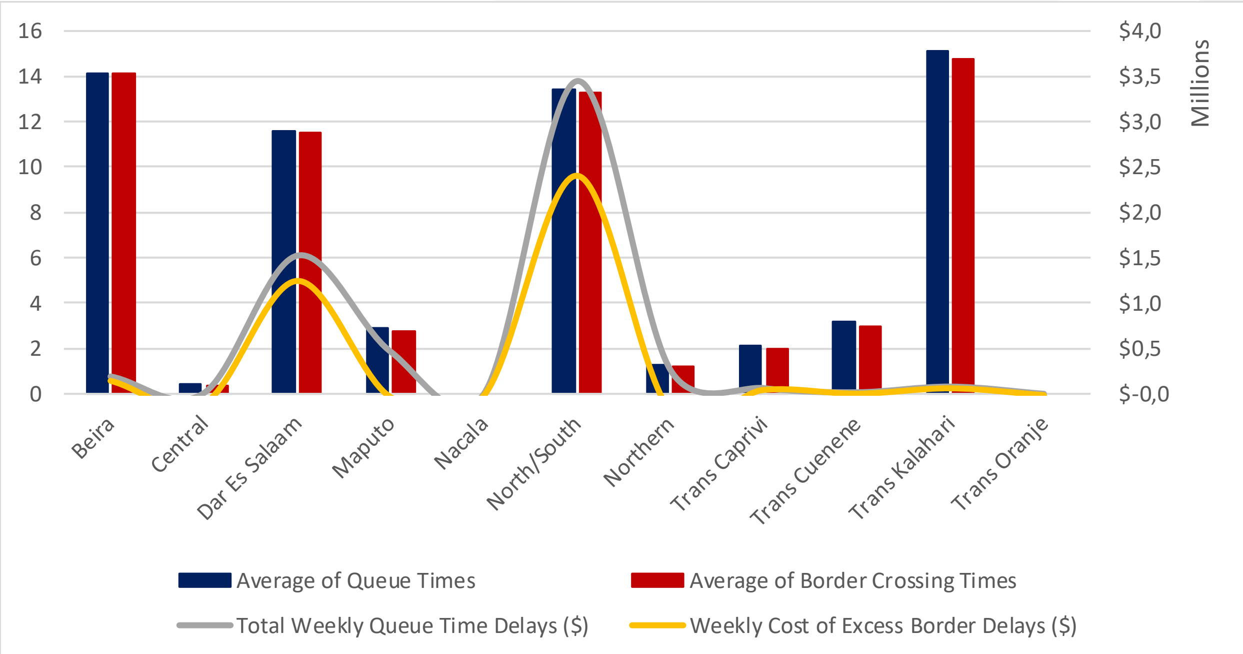
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 29/06/2025.

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

Figure 14 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 29/06/2025.

In summary, cross-border queue time averaged **~6,1 hours** (up by **~1,4 hours** from the previous week's **~4,8 hours**), indirectly costing the transport industry an estimated **$6 million** (**R108 million**). Furthermore, the week's average cross-border transit times also hovered around **6,1 hours** (up by **~1,3 hours** from the **~4,8 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,5 million** (**R63 million**). As a result, the total indirect cost for the week amounts to an estimated **~$9,6 million** (**R171 million**, up by **~R21 million** or **↑14%** from **~R150 million** in the previous report).

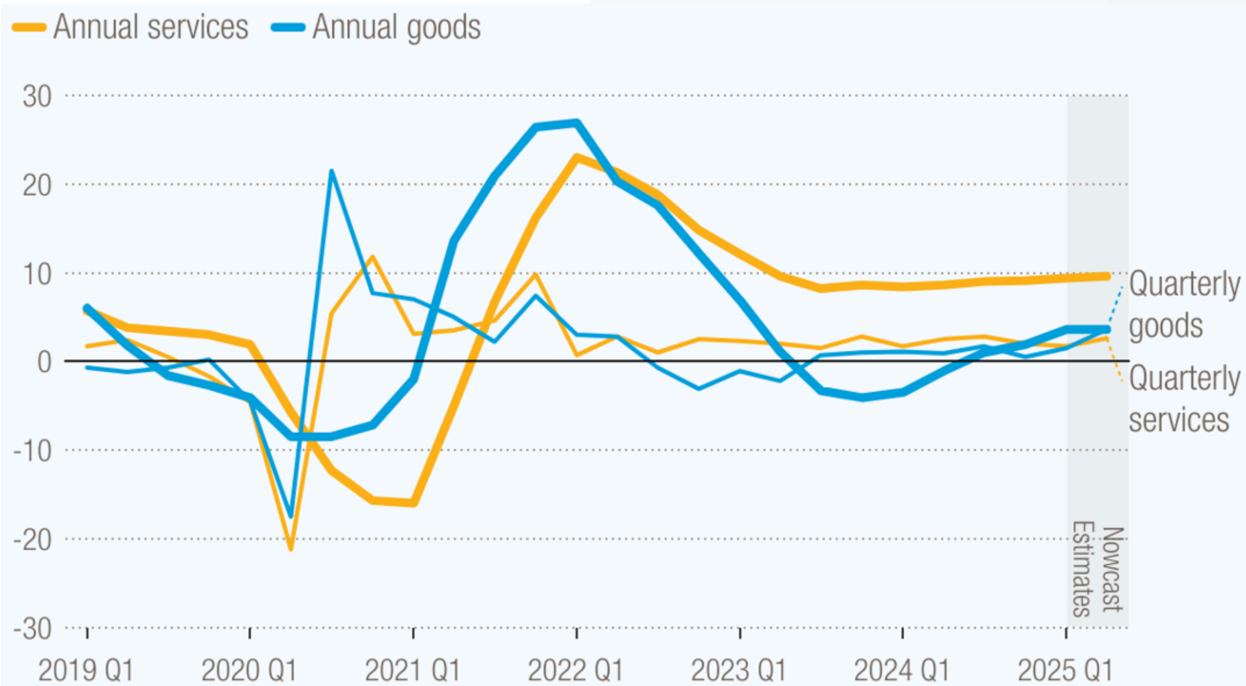
4. International Update

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

a. Global trading industry and tariffs

In the first half of 2025, global trade in goods and services demonstrated resilience, expanding by approximately **$300 billion** – roughly **↑1,5%** growth in Q1, with a further acceleration to **~↑2%** in Q2 – driven in part by rising prices even as trade volumes increased by just **↑1%**, according to the latest updates from UNCTAD. Developed economies notably led the charge, with US imports surging **↑14%** in Q1 and EU exports climbing **↑6%**. Trade imbalances widened, with deficits deepening in the US and surpluses increasing in China and the EU.

Figure 15 – Annual and quarterly growth in the value of trade in goods and services, 2019–2025 Q1



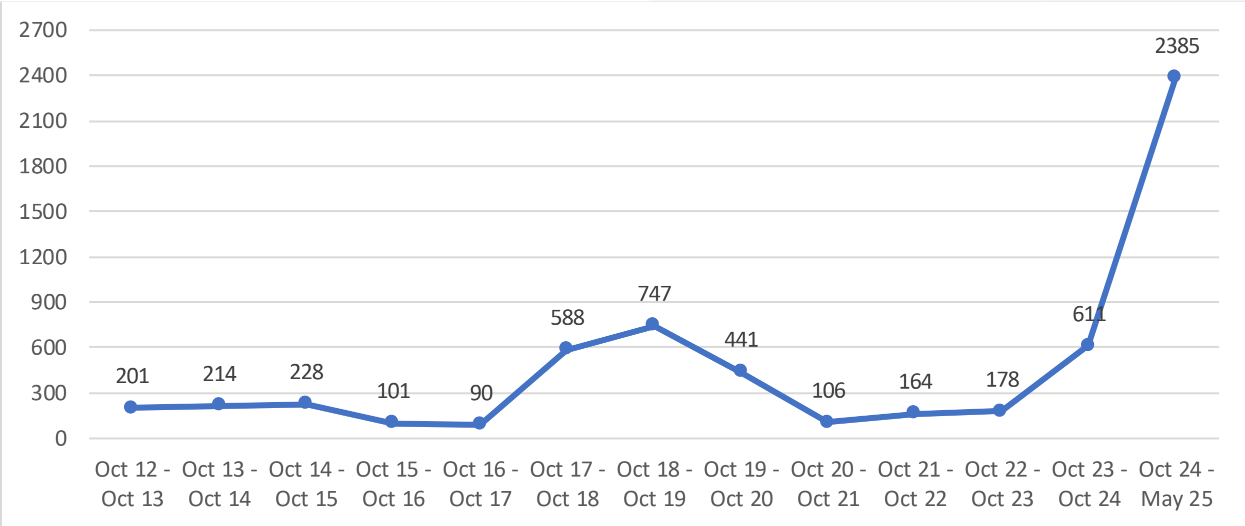
Source: *[UN Trade and Development (UNCTAD) calculations]*

Looking ahead, UNCTAD emphasises growing headwinds – persistent policy uncertainty (notably US tariff ambiguity – see below), geopolitical tensions, slowing global growth, expanding domestic subsidies, and potential retaliatory measures — all of which threaten supply chain stability and trade fluidity. Offsetting these risks are signs of freight and manufacturing resilience: key indices such as the SCFI and Baltic Dry have rebounded (see below), and regional integration continues to underpin trade. The update from UNCTAD echoes a recent update from the WTO. The WTO's "*Goods Trade Barometer*" climbed to **103,5** in June, up from **102,8** in March, indicating above-trend goods trade, primarily driven by importers' "*frontloading*" ahead of anticipated tariff hikes.[8]

[8] WTO. 26/06/2025. Goods barometer rises as imports surge in first quarter ahead of expected tariff hikes.

Indeed, since early 2025, the WTO has documented a sharp rise in new tariffs worldwide, accompanied by escalating trade-policy uncertainty. WTO monitoring flagged an increase in protectionist measures – particularly US steel and aluminium tariffs, motor vehicle tariffs, and “reciprocal” duties – and growing global concern over retaliatory actions. Trade negotiators are now emphasising the urgency of negotiated solutions to stave off a broader escalation. WTO Director-General Ngozi Okonjo-Iweala noted that the share of world merchandise imports affected by accumulated trade-restrictive measures surged from **12,5%** just six months ago to **19,4%**, underscoring sharp tariff increases and broader disruptions in the global trading environment.

Figure 16 – Trade coverage of new, other trade, and trade-related measures affecting imports by reporting period (not cumulative) in US$



Source: Reworked from WTO

The WTO report emphasises the importance of diplomacy and multilateral engagement in removing these barriers, highlighting the risk of stunted trade momentum without a timely resolution through structured negotiations.

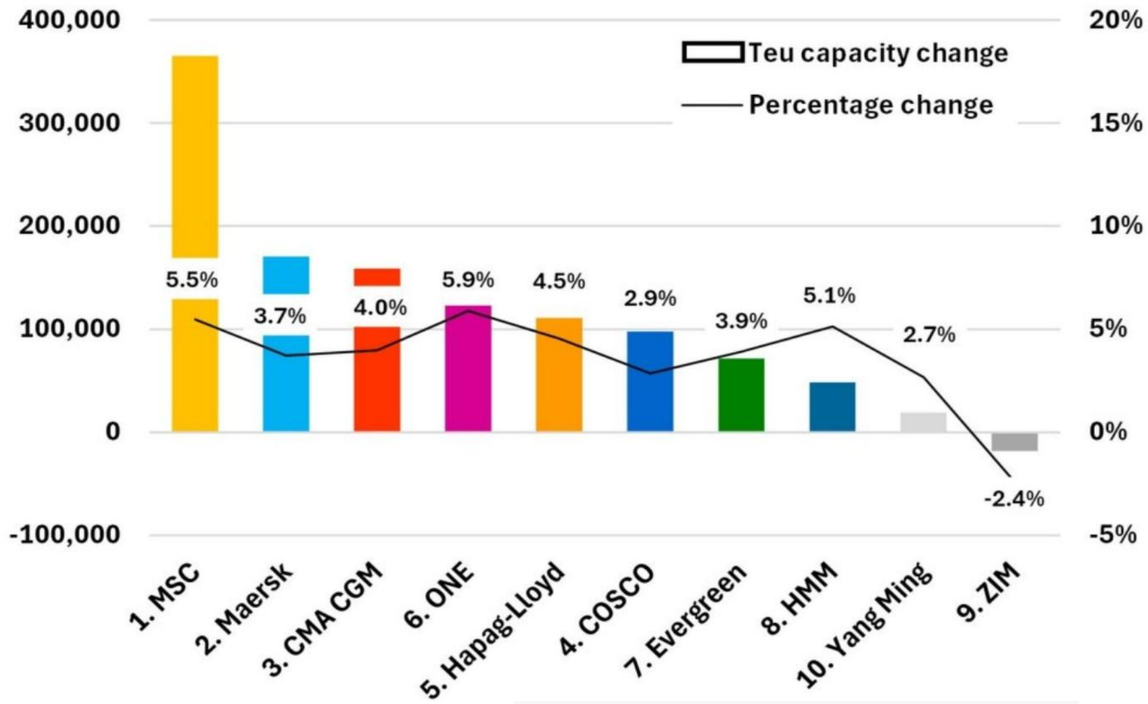
Lastly, US President Donald Trump has announced new unilateral tariff measures targeting over a dozen countries, including a **30% tariff on South African** goods effective after the July 9 deadline, following earlier “reciprocal” tariff threats and limited negotiating reprieves. The US has signalled these rates could be modified if bilateral talks yield a deal, but the measures deepen global trade-policy uncertainty, weighing on investment and planning. For South Africa, the **30% tariff** poses a significant threat to key exports and underscores the urgency of diversification and diplomacy to mitigate supply chain and economic risks (more to follow on this matter).

b. Global shipping industry

i. Global carrier capacity growth

In the first half of 2025, the global cellular fleet expanded by **1,18 million TEU**, a **↑3,8%** increase since January. This growth was predominantly driven by the ongoing fleet expansion of MSC, which continues to increase its capacity at a "relentless" pace. Meanwhile, ZIM distinguished itself by deviating from broader industry patterns, growing in a unique way that sets it apart. Overall, the uptick in global fleet capacity reflects steady sectoral expansion, with MSC’s dominance and ZIM’s differentiated strategy being the most significant developments.

Figure 17 – Top 10 carriers: capacity changes January versus July 2025

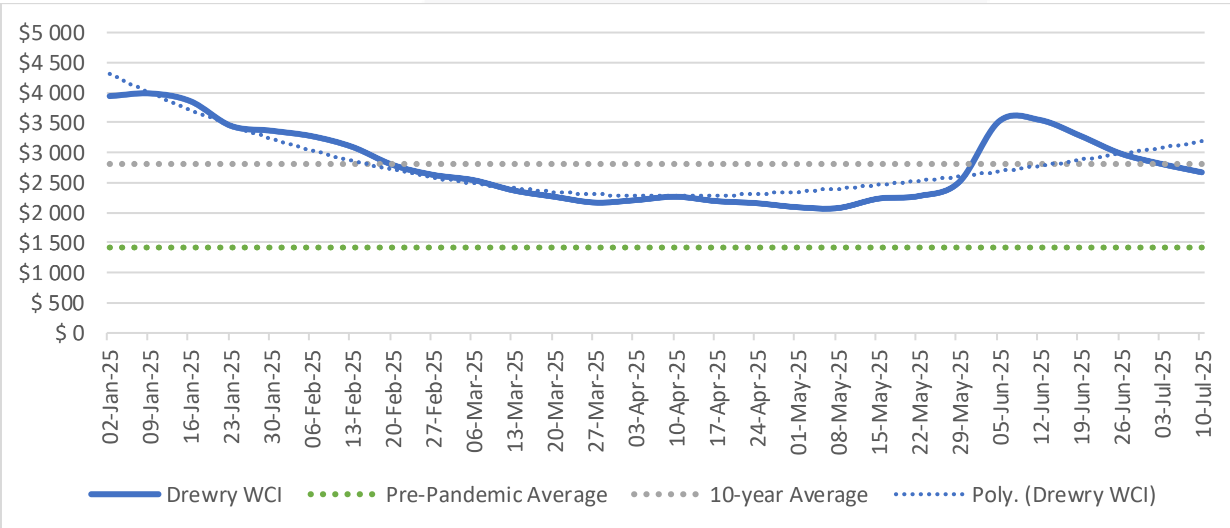


Source: Alphaliner

ii. Global freight rates

Drewry's "*World Container Index*" declined by **↓5,7%** (or **$171**) to **$2 812 per 40-ft container**[9], marking the third consecutive weekly drop.

Figure 18 – World Container Freight Index ($ per 40ft)



Source: Calculated from Drewry

[9] Drewry. 03/07/2025. World Container Index.

The continued decline is a direct result of low demand for US-bound cargo and is a sign that the recent surge in US imports, which occurred after the temporary halt in higher US tariffs, will not have the lasting impact we initially expected. Meanwhile, the *Harper Petersen Index* (Harpex) traded around **2 161 points** on Friday.[10]

c. Global air cargo industry

In the high-frequency metrics from World ACD, global air cargo tonnages in June 2025 were **↑2%** higher year-on-year, though they fell **↓4%** compared to May, indicating seasonal softening amid overall annual growth. In June 2025, global air cargo rates rose **↑2%** month-on-month but remained **↓1%** below June 2024 levels. Average worldwide air cargo rates rose by **↑2%** in June (m/m), taking them **↓1%** below their level in June 2024.

Figure 19 – Region to region: capacity, chargeable weight, and rates (last two to five weeks, % change)

Origin Regions last 2 to 5 weeks (WORLD ACD)	Capacity[1]			Chargeable weight[1]			Rate[1]		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-1%	+7%		-0%	+10%		+1%	+5%
Asia Pacific		+1%	+4%		+3%	+8%		+0%	-3%
C. & S. America		-1%	+1%		-5%	+0%		-1%	-1%
Europe		+1%	+1%		+6%	-1%		+2%	+5%
M. East & S. Asia		-2%	-1%		+6%	+5%		-1%	-13%
North America		-0%	-0%		+0%	+1%		+0%	+1%
Worldwide		+0%	+1%		+3%	+4%		+1%	-1%

Source: World ACD

Regionally, Asia Pacific–US spot rates climbed **~↑10%** to **$5,19/kg**, driven by volatile US tariff policies, while China–US tonnages fell **~↓15%** since March and **~↓11%** year-on-year, with rates down **↓16%** (y/y) to **$4,29/kg**. Conversely, China–Europe tonnages grew **↑15%** (y/y), with stable rates at **$3,97/kg**. Worldwide chargeable weight rose **↑2%** (y/y) in June but fell **↓4%** month-on-month. Capacity rose **↑4%** (y/y) over the last 5 weeks. Africa-specific trends showed rates up **↑7%** (y/y), with chargeable weight **↑5%** (y/y) and capacity **↑8%** (y/y) in the latest 2–5 week comparison, indicating strong regional demand.

ENDS[11]

[10] Harpex. 04/07/2025. Harper Petersen & Co Charter Rate Index.

[11] **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.*