

Cargo Movement Update #239¹

Date: 22 June 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)	45 458	51 790	97 248	41 190	46 927	88 117	↑10%
Air Cargo (tons)	4 199	2 250	6 449	4 670	2 485	7 155	↓10%

Monthly Snapshot

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

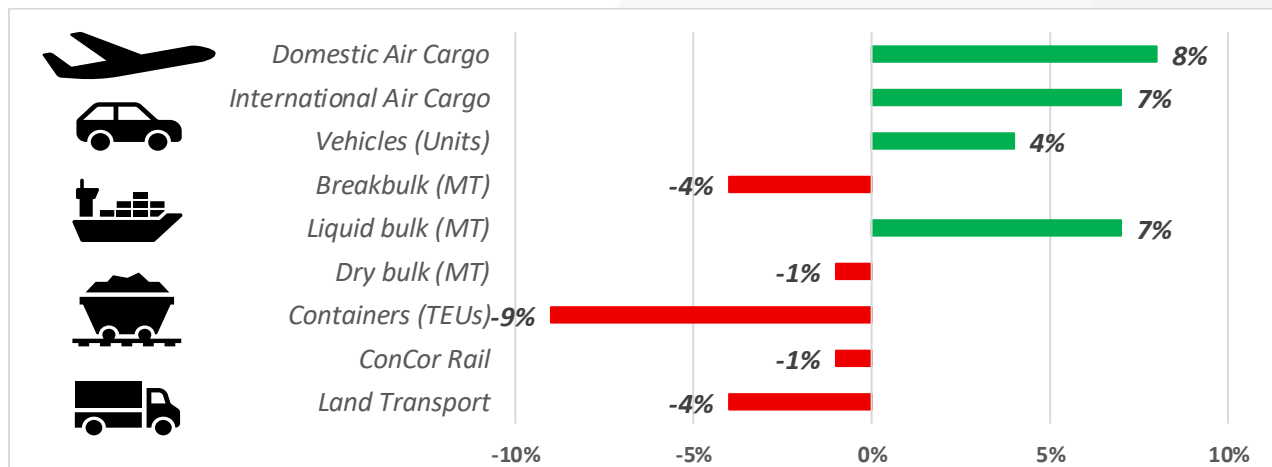
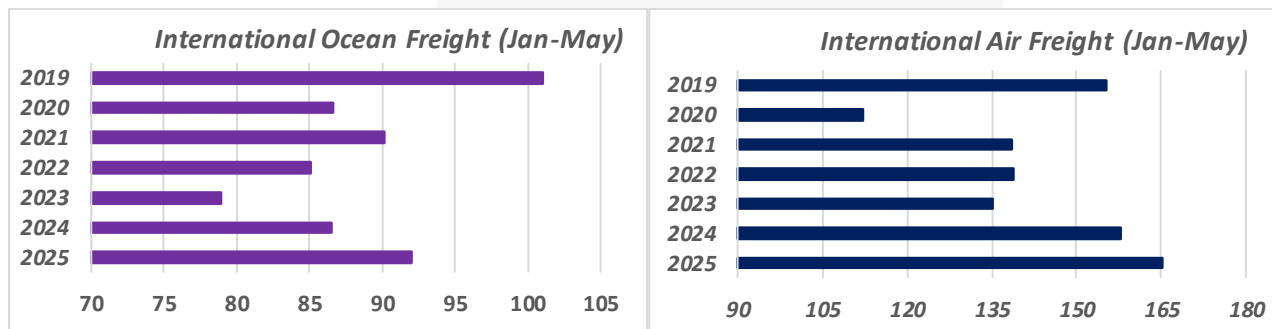


Figure 2 – Year-to-date flows 2019-2025⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~13 893 TEUs was handled per day, with ~12 466 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 3 294 containers, up by ↑101% from last week.
- Cross-border queue: ↑0,6; transit: ↑1,5 hrs; SA borders: 10,8 hrs (↑16%); SADC: 4,7 hrs (no change).
- Strait of Hormuz closure threatens 20% of crude oil & LNG transit and 8,4% of world's container fleet.
- Global spot rates fell for the first time in six weeks, with the WCI down by ↓7% (or \$264) to \$3 279/40ft.
- Global air cargo plummets as carriers suspend Middle Eastern services. Rates remain stable @\$2,41/kg.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 239th 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, an annual record average of **13 893 TEUs** was handled daily, increasing from **12 588 TEUs** the previous week. Despite the record, port operations were still intermittently delayed by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages. Equipment challenges and adverse weather ensured operational disruptions at the Port of Cape Town, while the main operational constraints in Durban proved to be continuous equipment breakdowns and congestion. Inclement weather, vessel ranging, and vacant berths mainly impacted operations at our Eastern Cape Ports; however, minimal delays were reported at the Port of Richards Bay. Due to maintenance operations, Berth IV7 at the Island View terminal is expected to be out of commission until next Tuesday. The latest reports from TFR suggest intermittent cable theft is still occurring on the Central Corridor near Pretoria; however, the situation is improving.

Geopolitical tensions continue to disrupt global shipping dynamics. Iran's parliamentary vote to potentially close the Strait of Hormuz threatens up to **3,4% of global container volumes**, prompting carriers to consider rerouting via the Suez Canal, while oil prices face upward pressure. In the Eastern Mediterranean, Maersk has suspended calls at Haifa amid Iran-Israel tensions, straining regional feeder networks. Meanwhile, container throughput on the Asia-Northern Europe route has grown **17% over two years** (with capacity also up by **↑11,7%** year-over-year), exacerbating severe congestion at major North European ports. Globally, freight rates retreated for the first time in six weeks. Despite this dip, spot and charter rates remain elevated, though softening demand signals a possible market peak.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~600 000 kg** inbound (**↓10%**, w/w) and **~320 000 kg** outbound (**↓9%**). Despite the weekly reduction, cargo is still trending above last year's levels (**↑9%**, y/y) and slightly above the comparative levels of pre-pandemic 2019 (**↑2%**). Global air cargo volumes remained under pressure, with a **↓7%** drop in European chargeable weight and flat worldwide volumes, although rates held steady at **\$2,41/kg**, showing year-on-year stability. Meanwhile, service disruptions due to escalating conflict in the Middle East – marked by suspended operations through Doha, Dubai, and Riyadh – have constrained capacity, prompting rerouting and potential upward pressure on rates across adjacent regions.

Cargo movements along the N4 corridor increased for road and decreased significantly due to the annual rail shutdown for maintenance until the end of the month – truck volumes through the border post at **1 626 HGVs per day** (**↑6%**, w/w). Queue times decreased slightly to an average of **2,7 hours** (**↓7%**) at the border, as the average processing time also decreased slightly to around **2,4 hours** (**↓4%**) per crossing. Before the annual maintenance shutdown, **seven trains** travelled to Maputo, as did **one sugar train** from Eswatini.

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 **around half 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 increased by **an hour and a half**, averaging **~10,8 hrs** (**↑16%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**). On average, three SADC borders took more than a day to cross last week, namely Beitbridge, Groblersbrug and Kasumbalesa (the worst affected, with an average of **two days** from **the Zambian side**). Other developments included **(1)** Bayhead Road upgrades, **(2)** CBRTA permit changes, **(3)** Lesotho TIN requirements, and **(4)** Zimbabwe maize import ban and accidents.

In summarising this edition, we celebrate the record container throughput achieved at our container terminals since at least our records began. Led by Pier 2, more than **97 thousand TEUs** were handled, **↑13%** above target. Encouragingly, it appears the hard work by all involved – from TPT personnel to logistics partners – together with the deployment of new equipment, improved cargo evacuation processes, and ongoing terminal refurbishments, is beginning to bear fruit in this critical sector. As mentioned last week and given the strategic role of containerised cargo, **accounting for nearly 40% of trade**, this week's milestone offers a welcome signal of recovery. We commend TPT and its stakeholders for this achievement, which must now serve as a springboard for sustained momentum. Let us move from strength to strength.

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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 16 to 22 June (measured in TEUs)

7-day flow reported (16/06/2025 – 22/06/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	6 067	42 466	↑44%
New Pier (Pier 1)	1 850	12 950	↓10%
Cape Town Container Terminal	2 117	14 818	↓19%
Ngqura Container Terminal	2 321	16 248	↓2%
Port Elizabeth Container Terminal	574	4 021	↑61%
Other	964	6 745	↑1%
Total	13 893	97 248	↑10%

Source: Calculated from TPT, 2025. Updated 22/06/2025.

An increased average of ~**13 893 TEUs (↑10%)** was handled per day for the last week (16 to 22 June, Table 2), above the projected average of ~**12 275 TEUs (↑13% actual versus projected)**.

For the coming week, a slightly decreased average of ~**12 466 TEUs (↓10%)** is predicted to be handled (23 to 29 June, Table 3). Despite the record, port operations were still intermittently delayed by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages.

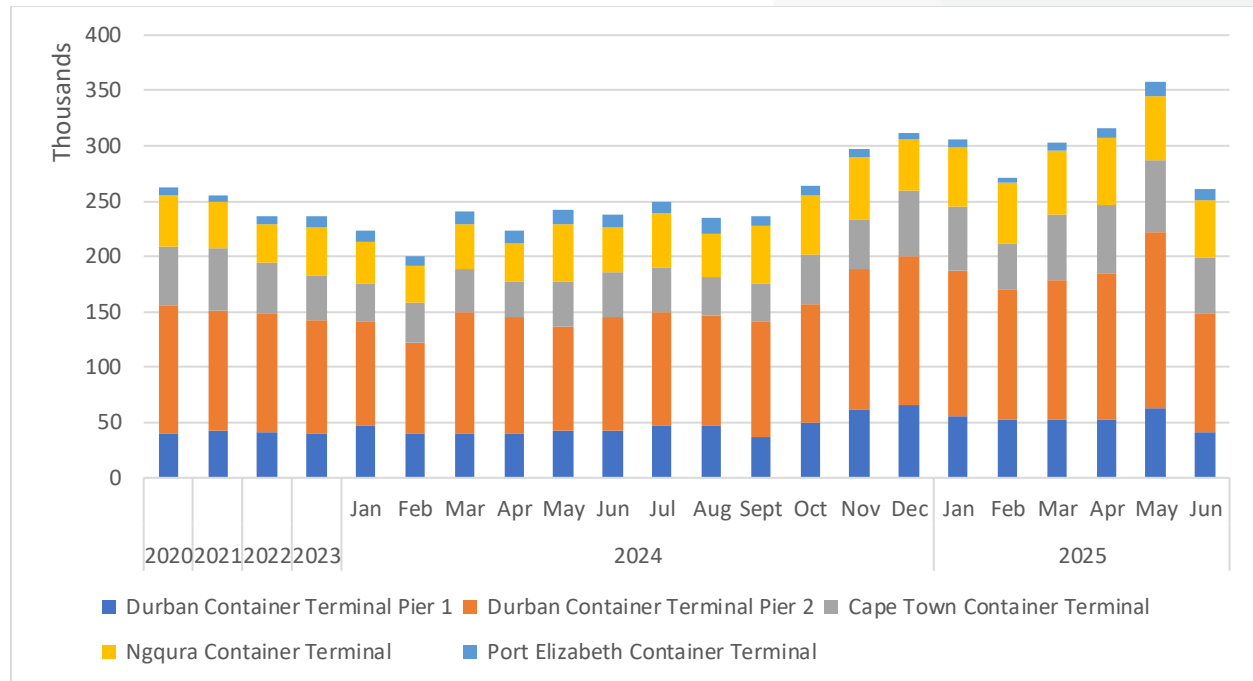
Table 3 – Container Ports – Weekly flow projected for 23 to 29 June (measured in TEUs)

7-day flow projected (23/06/2025 – 29/06/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 322	37 257	↓12%
New Pier (Pier 1)	2 040	14 281	↑10%
Cape Town Container Terminal	1 730	12 113	↓18%
Ngqura Container Terminal	2 061	14 428	↓11%
Port Elizabeth Container Terminal	476	3 330	↓17%
Other	836	5 852	↓13%
Total	12 466	87 261	↓10%

Source: Calculated from TPT, 2025. Updated 22/06/2025.

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.

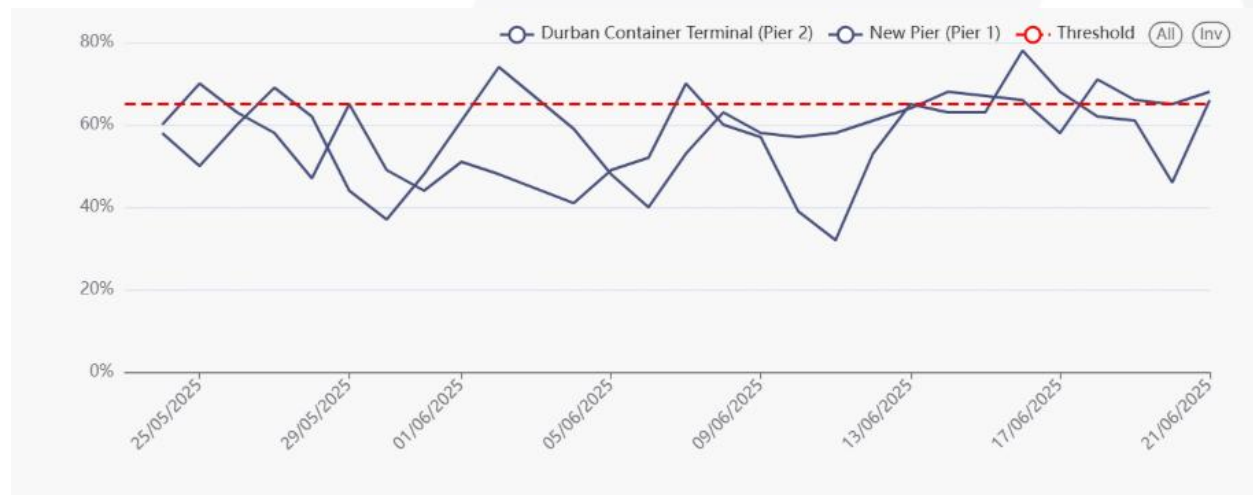
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 22/06/2025.

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

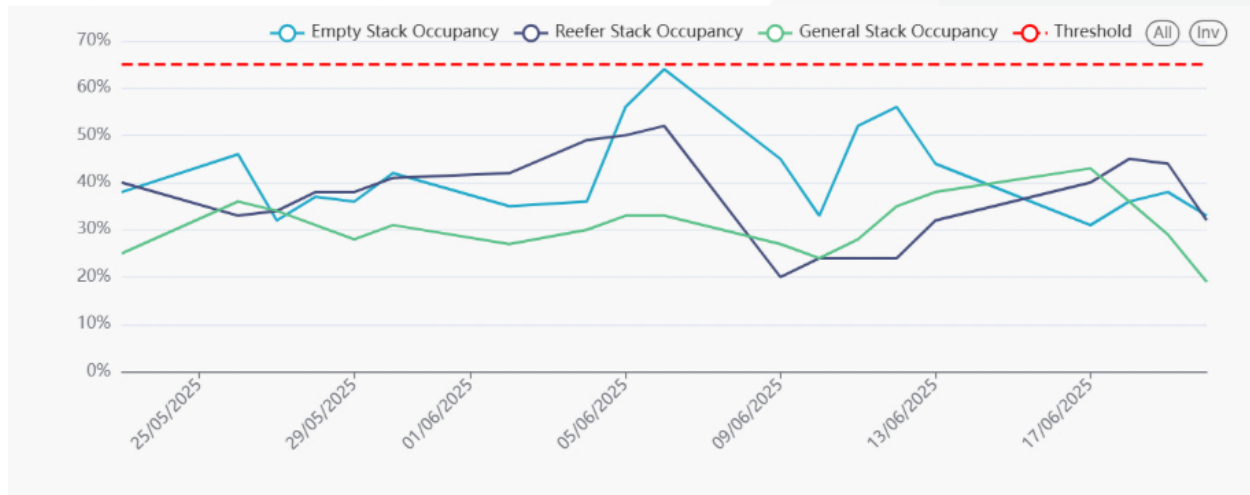
Figure 4 – Stack occupancy in DCT, general-purpose containers (25 May to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 22/06/2025.

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 (25 May to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 22/06/2025.

b. Summary of port operations

i. Weather and other delays

- Equipment challenges and adverse weather ensured operational disruptions at the Port of Cape Town.
- The main operational constraints in Durban proved to be continuous equipment breakdowns and congestion.
- Inclement weather, vessel ranging, and vacant berths mainly impacted operations at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

ii. Cape Town

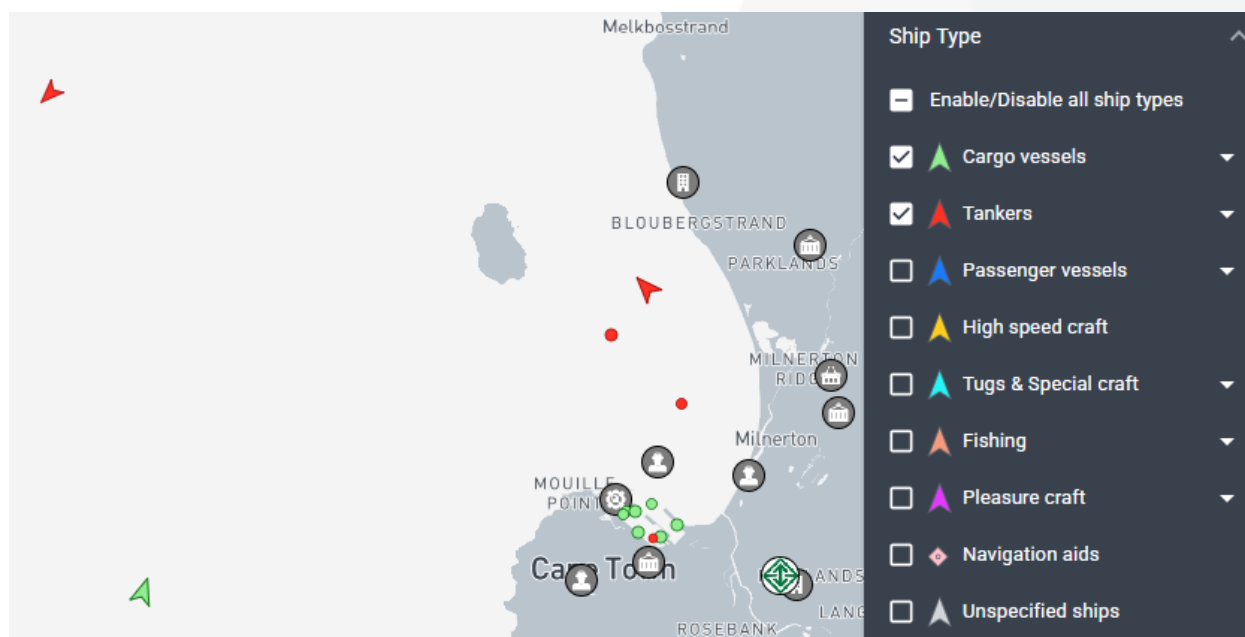
On Friday, CTCT recorded two vessels at berth and two at anchor, as equipment challenges and adverse weather proved to be the primary operational constraints at the port. On the landside, between Monday and Thursday, the terminal managed to service at least 4 598 trucks while handling approximately 105 rail units. On the waterside, the terminal executed approximately 6 701 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 19%, reefers at 32%, and empties at 33%**. Additionally, the terminal operated with **eight STS cranes, 21 RTGs, and 55 hauliers** towards the end of the week. Crane LC6 was out of commission for the most significant part of the week.

On Friday, CTMPT recorded one vessel at berth and one at outer anchorage. In the preceding 24 hours, the terminal managed to handle 375 tons on the waterside as operations were impacted by rainy weather. On the landside, 29 trucks were processed during the same period. Stack occupancy was recorded at 1% for general cargo, 0% for reefers, and 12% for empties. Towards the end of the week, the terminal operated with three cranes, three reach stackers, four straddle carriers, and 12 hauliers.

Between 9 and 15 June, the FPT terminal handled 11 vessels: seven multi-cargo, two dry bulk, one container, and one breakbulk vessel. Berth occupancy during this period was recorded at 77%. The terminal planned to handle six more vessels between 16 and 22 June, with another eight vessels scheduled between 23 and 29 June. Inclement weather as well as the late arrival of cargo and transporters accounted for the most significant operational constraints during this period.

Lastly, TNPA has unveiled plans for a **R2,5 billion** back-of-port facility, including warehouses to improve terminal fluidity in and out of the port.⁶

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



Source: Marine Traffic. Updated 23/06/2025 at 14:00.

iii. Durban

On Friday, Pier 1 recorded one vessel on berth, with two vessels at anchor. Stack occupancy was **47% for GP containers** and **19% for reefers**. Between Monday and Thursday, the terminal executed at least 4 823 gate moves and 416 rail moves on the landside. The **average TTT** for the week was **~70 minutes (↑35%, w/w)** and an average **staging time** of **~38 minutes (↓16%)**. Additionally, the terminal moved over 4 647 TEUs across the quay on the waterside during the same period. The terminal had **five STS cranes** and **16 RTGs** available towards the end of the week.

The latest reports from Maersk suggest that the One Resilience will undergo a dual call in Durban. The vessel will commence her first call at Durban Point Terminal to discharge imports, whereafter she will proceed to Pier 1 to load exports.

Pier 2 had four vessels on berth and one at anchorage on Friday, as equipment breakdowns and congestion prevented optimal operational performance this week. Stack occupancy was recorded at **65% for GP containers** and **35% for reefers**. The terminal operated with **12 gangs** and moved over **15 100** containers across the quay between Monday and Thursday on the waterside. Approximately 10 859 gate moves were executed on the landside during the same period. The **average TTT** for the week was **~95 minutes (↑61%, w/w)** and an average **staging time** of **~69 minutes (↓16%)**. Approximately 1 701 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **69** and **73** out of a

⁶ Ebrahim, N. 23/06/2025. [MPs 'cautiously optimistic' as Transnet launches R2.5bn Cape Town port revamp.](#)

fleet complement of **88** this week. Thus, the availability figure sat roughly at **81%** during this period. Towards the end of the week, the most notable crane absentees were Cranes 520, 527, and 533.

Durban's MPT terminal recorded three vessels at berth on Friday and none at outer anchorage. Stack occupancy for containers was recorded at 34%, the reefer stack at 45%, and the breakbulk stack at 35%. In the preceding 24 hours, 402 containers and 1 207 tons of break bulk were handled on the waterside. On the landside, 469 container trucks were serviced at a TTT of ~28 minutes. Additionally, 20 breakbulk trucks, containing 446 tons, were serviced during this period. Two cranes, seven reach stackers, seven forklifts, and 19 ERFs were in operation. Towards the end of the week, the technical team was still conducting fault-finding operations on the third crane. No ETR is available yet.

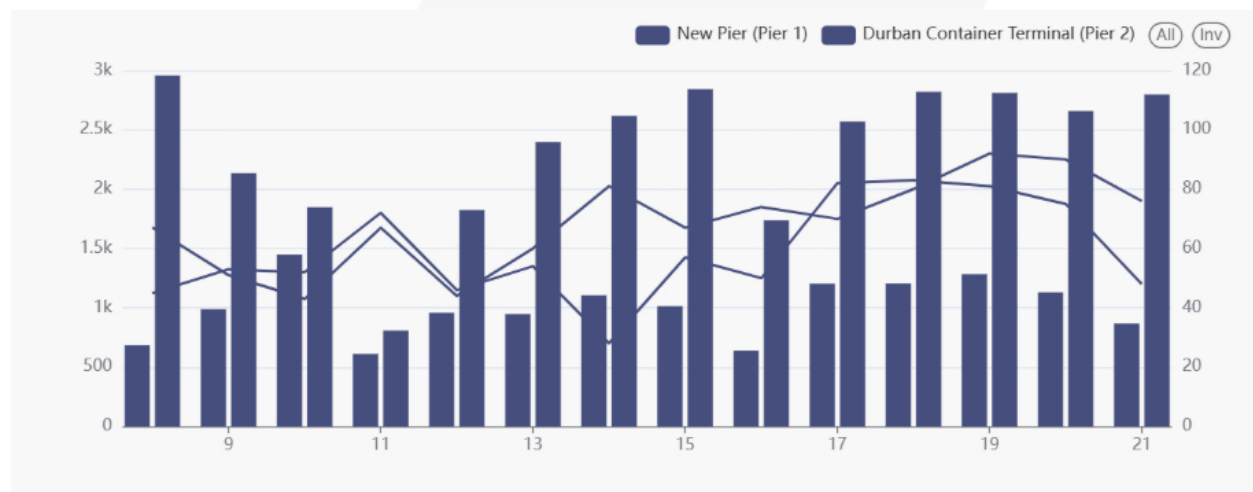
The Maydon Wharf MPT recorded one vessel at berth and zero at anchorage between Wednesday and Thursday. On the waterside, the terminal managed to handle 147 tons, while 32 trucks, containing approximately 1 227 tons, were serviced on the landside. During the same period, the agri-bulk facility recorded one vessel at berth and none at anchor. The terminal managed to handle 4 189 tons on the waterside and zero trucks on the landside.

On Friday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with none at anchorage. In the preceding 24 hours, the terminal handled 2 314 road units and 250 units on rail on the landside while 2 148 units were handled on the waterside. Overall stack occupancy was 77%, 70% at Q&R, and 60% at G-berth. During this period, the terminal had 119 high-and-heavy (abnormal loads) on hand and managed to handle 51.

Due to maintenance operations, Berth IV7 at the Island View terminal is expected to be out of commission until next week. Operational challenges are anticipated as a result. The berth is expected to be recommissioned around 24 June.

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

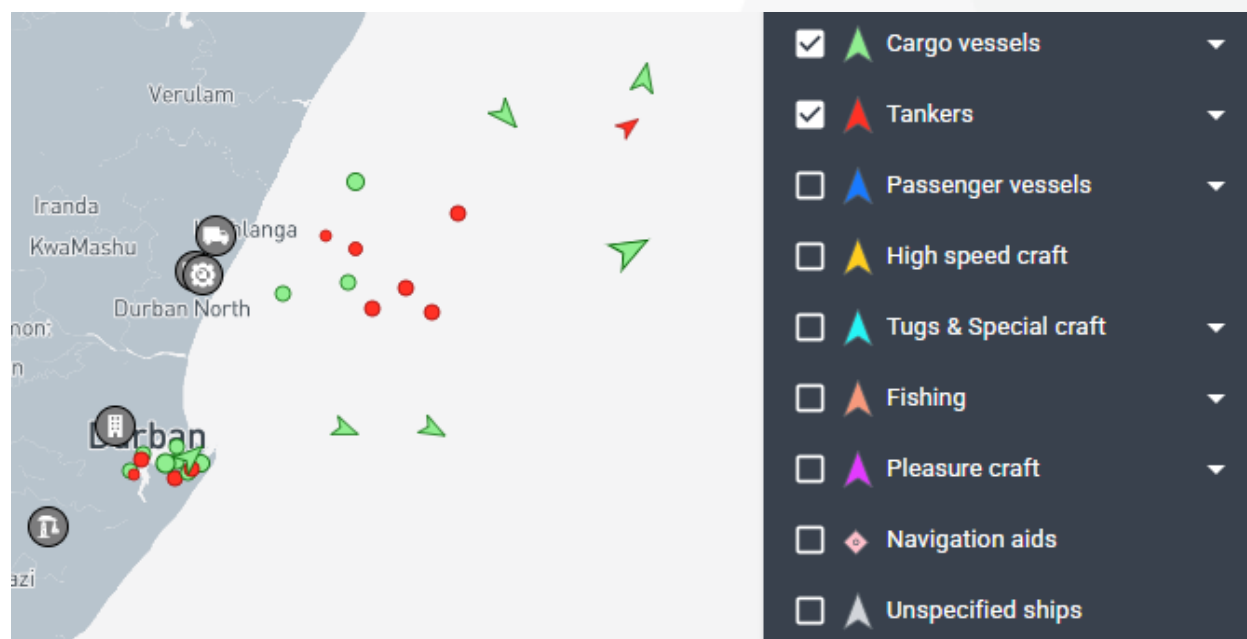


Source: Calculated using data from Transnet, 2024, and updated 22/06/2025.

The queue of container vessels waiting outside Durban has decreased slightly from last week. On Monday evening (23 June), **two** container vessels were waiting outside at anchorage for Pier 1, **one** for Pier 2, and

none for Point. The queue of dry (**four**), liquid (**seven**), and breakbulk (**two**) vessels has remained steady from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 23/06/2025 at 14:00.

iv. Richards Bay

On Friday, the Port of Richards Bay had ten vessels at anchor and 12 on the berth, translating to three at DBT, three at MPT, four at RBCT, and two at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources towards the end of the week. There was a significant rebound in coal throughput, as the daily average for the week increased to around **172 728 tons** (**↑71%**, w/w). An average of **21 trains** (stable 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 no vessels drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. Stack occupancy figures were recorded at 29% for reefers, 45% for reefer ground slots, and 31% for the general stack. Despite conceding 11 hours during this period due to adverse weather, ten hours to vessel ranging, and 17 hours to vacant berths, the terminal handled approximately 1 133 TEUs and 148 reefers on the waterside. Approximately 719 trucks were processed on the landside at a TTT of ~19 minutes. Towards the end of the week, the terminal had five STS cranes, 22 RTGs, and 46 hauliers in service.

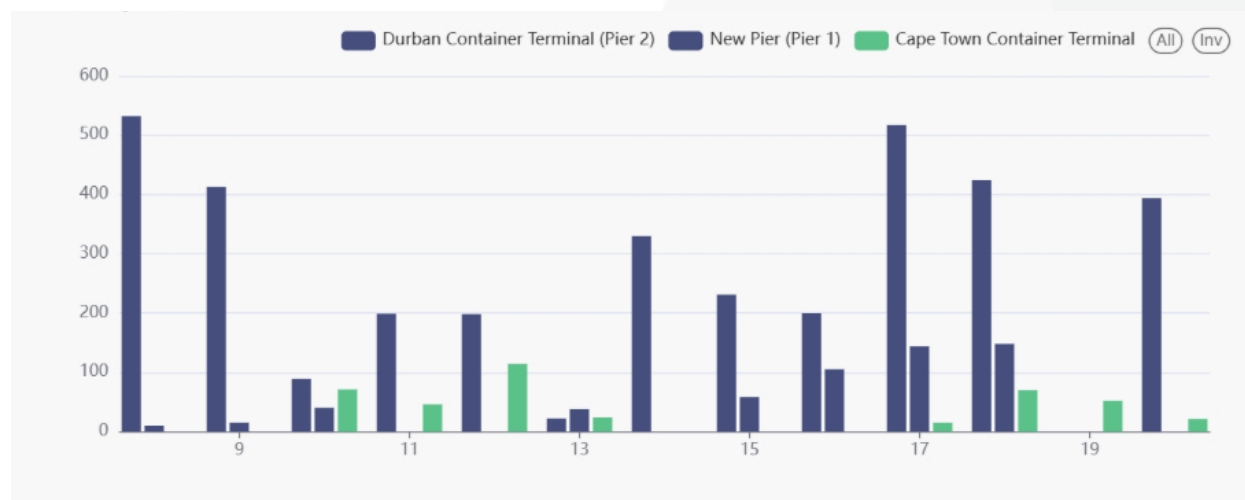
On Friday, GCT had one vessel at berth and zero at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 178 trucks were processed at a TTT of ~31 minutes on the landside, while 408 TEUs and two reefers were handled across the quay on the waterside. Stack occupancy was recorded at 20% for the general stack, 39% for reefers, and 25% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and ten straddles in service.

On Friday, the Ro-Ro terminal had one vessel on berth and none at outer anchorage. In the 24 hours before, the terminal handled 1 393 units resulting in a stack occupancy figure of 61%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest intermittent cable theft is still occurring on the Central Corridor near Pretoria; however, the situation is improving. Additionally, towards the end of the week, DCT Pier 2 had 1 655 ConCor units on hand with a dwell time of 148 hours and 302 over-border units with a dwell time of 69 days.

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



Source: Calculated using data from Transnet, 2024. Updated 22/06/2025.

In the last week (16 to 22 June), rail cargo on the ConCor line out of Durban was reported at **3 294** containers, doubled (**↑101%**) from the previous week's **1 641** 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 9 June. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in June 2024 averaged **~845 561 kg** daily.

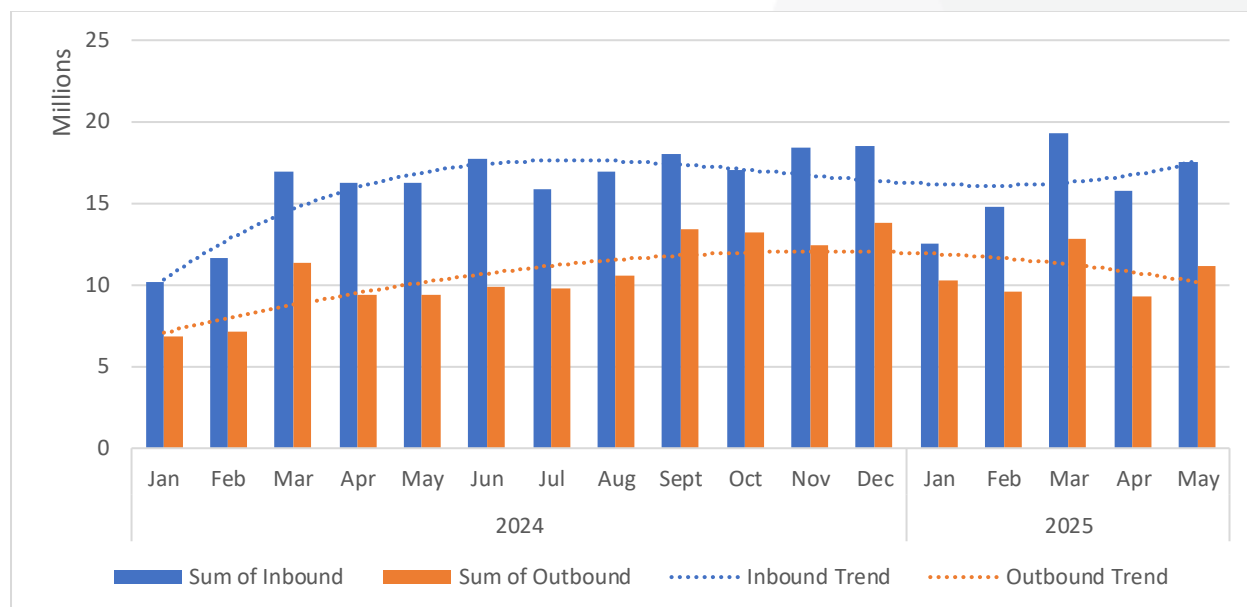
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	09-Jun	10-Jun	11-Jun	12-Jun	13-Jun	14-Jun	15-Jun	Week
Volume inbound	527 321	223 138	322 220	397 224	236 071	541 255	1 951 789	4 199 018
Volume outbound	111 891	145 155	156 966	148 973	169 909	214 188	1 302 549	2 249 631
Total	639 212	368 293	479 186	546 197	405 980	755 443	3 254 338	6 448 649

Courtesy of ACOC. Updated: 22/06/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~600 000 kg** inbound (**↓10%**, w/w) and **~320 000 kg** outbound (**↓9%**). Despite the weekly reduction, cargo is still trending above last year's levels (**↑9%**, y/y) and slightly above the comparative levels of pre-pandemic 2019 (**↑2%**). The following figure shows the international air cargo flows to and from all terminals since the start of last year:

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

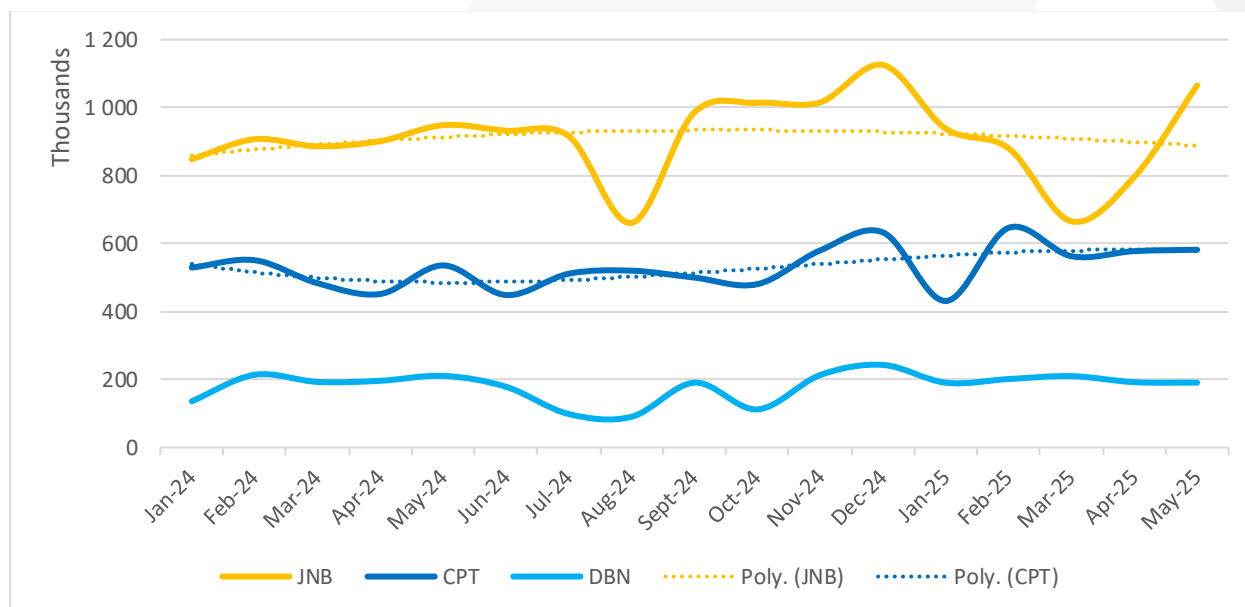


Calculated from ACOC. Updated: 22/06/2025.

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: 22/06/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (16 to 22 June), cargo movements along the N4 corridor increased for road and decreased significantly due to the annual rail shutdown for maintenance until the end of the month. The following notes summarise the recent developments:

- Truck volumes through the border post at **1 626 HGVs per day (↑6%, w/w)**.
- Queue times decreased slightly to an average of **2,7 hours (↓7%)** at the border, as the average processing time decreased somewhat to around **2,4 hours (↓4%)** per crossing.
- Before the annual maintenance shutdown, **seven trains** travelled to Maputo, as did **one sugar train** from Eswatini.

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

Table 5 – Lebombo border post update⁷

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
16-Jun-25	1 448	1 411	1 329	92	15	46	2	234	9	7	1	1
17-Jun-25	1 542	1 481	1 227	177	12	121	18	247	0	n/a	n/a	n/a
18-Jun-25	1 583	1 583	1 197	223	33	113	15	278	0	n/a	n/a	n/a
19-Jun-25	1 668	1 566	1 170	216	38	95	46	280	0	n/a	n/a	n/a
20-Jun-25	1 771	1 784	1 333	265	64	89	33	336	0	n/a	n/a	n/a
21-Jun-25	1 625	1 616	1 236	254	23	61	42	264	0	n/a	n/a	n/a
22-Jun-25	1 748	1 727	1 430	187	36	51	22	262	0	n/a	n/a	n/a
% of design capacity	108%	106%	106%	101%	n/a	165%	51%	14%	6%	70%	17%	25%
% change (d/d)	8%	7%	16%	-26%	57%	-16%	-48%	-1%	n/a	n/a	n/a	n/a

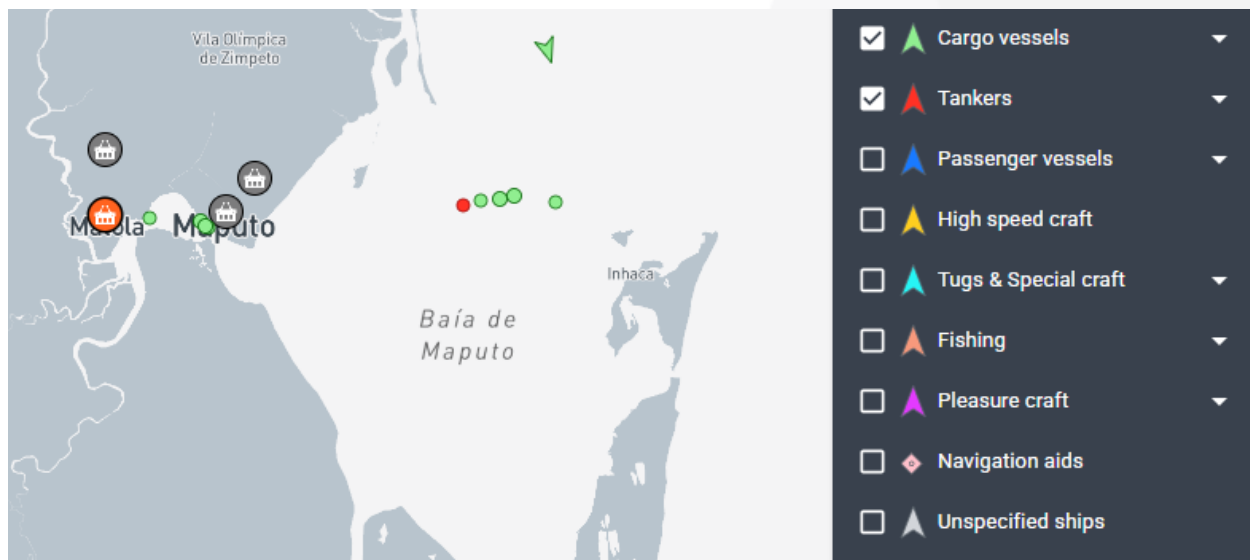
Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 22/06/2025.

* = not reported

The following shows a snapshot of the vessels waiting for the Port of Maputo:

⁷ In last week's report, the figures for the Lebombo border post in Table 5 were misaligned. Each data point under the respective headings should have shifted one column to the right. As a result, the figures originally reported under "Eswatini to Maputo" should have appeared under "Total Trucks Entering KM4." We apologise for the oversight and any confusion caused.

Figure 12 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 23/06/2025 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 **around half an hour** from last week, while transit time increased by around **an hour and a half**.
- The median border crossing times at South African borders increased by **an hour and a half**, averaging **~10,8 hrs (↑16%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs (no change)**.

1. Bayhead road alternative route issues (Port of Durban):

- With the ongoing rehabilitation of the Bayhead Road⁸, the route is limited to loads ≤ 3 500mm wide.
- Wider loads require Metro Police escort and coordination with the construction team – there is a risk of congestion if wide loads are not moved in a convoy.
- Height/weight of loads should be verified in advance.

2. CBRTA permit changes:

- New permits are now printed on A4 paper (no longer licence format).
- Applications can be emailed, improving processing time.
- Includes scannable QR codes for law enforcement.
- Concern raised over ease of forgery.

3. Lesotho TIN Requirement (from 1 July):

- Exporters must obtain a **Taxpayer Identification Number (TIN)**.
- A Lesotho-based agent must be appointed and registered with AFFAL.

⁸ Campbell, R. 04/06/2025. [Durban port's Bayhead road to undergo rehabilitation](#).

- c. Exemptions must be applied for in advance.
- d. No TIN/exemption = no exports allowed.
- e. Part of RSL's Asycuda system upgrade; full readiness confirmed.

4. Beitbridge Delays (Weekend):

- a. Smuggled goods found in a truck cab caused southbound delays.
- b. Officials cited scanner limitations (not 24/7 operational).

5. Zimbabwe Maize Import Ban (from 1 June):

- a. Zimbabwe halts new maize/maize meal import permits after bumper harvest.
- b. Existing permits expired on 31 May.
- c. Grain millers urged to source locally.

6. Accidents in Zimbabwe (20 June):

- a. **Marondera-Harare Route (11:21):** One lane blocked post-railway line, traffic managed.
- b. **Near Makuti (10:39):** Both lanes are blocked, and the one-vehicle gap is operational — caution advised.

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

Table 6 – Delays⁹ summary – South African borders (both directions)

Border Post	Direction	HGV ¹⁰ 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	503	27,1	7,2	26,0	15 090	3 521
Beitbridge	Zimbabwe-SA	452	8,8	2,3	12,5	13 560	3 164
Groblersbrug	SA-Botswana	240	18,6	1,3	27,0	7 200	1 680
Martin's Drift	Botswana-SA	217	2,3	0,3	2,3	6 510	1 519
Kopfontein	SA-Botswana	238	9,4	1,2	8,2	7 140	1 666
Tlokweng	Botswana-SA	21	0,6	0,2	0,4	630	147
Vioolsdrift	SA-Namibia	30	4,1	1,2	3,6	900	210
Noordoewer	Namibia-SA	20	2,7	0,5	2,2	600	140
Nakop	SA-Namibia	30	2,8	0,6	3,3	900	210
Ariamsvlei	Namibia-SA	20	0,9	0,3	0,6	600	140
Skilpadshek	SA-Botswana	267	4,1	1,5	5,2	8 010	1 869
Pioneer Gate	Botswana-SA	54	0,0	0,0	0,0	1 620	378
Lebombo	SA-Mozambique	1 460	0,8	0,2	0,5	43 800	10 220
Ressano Garcia	Mozambique-SA	1 530	2,7	0,4	2,4	45 900	10 710
Sum/Average		5 082	6,1	1,2	6,7	152 460	35 574

Source: TLC, FESARTA, & Crickmay, week ending 15/06/2025.

⁹ 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.

¹⁰ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

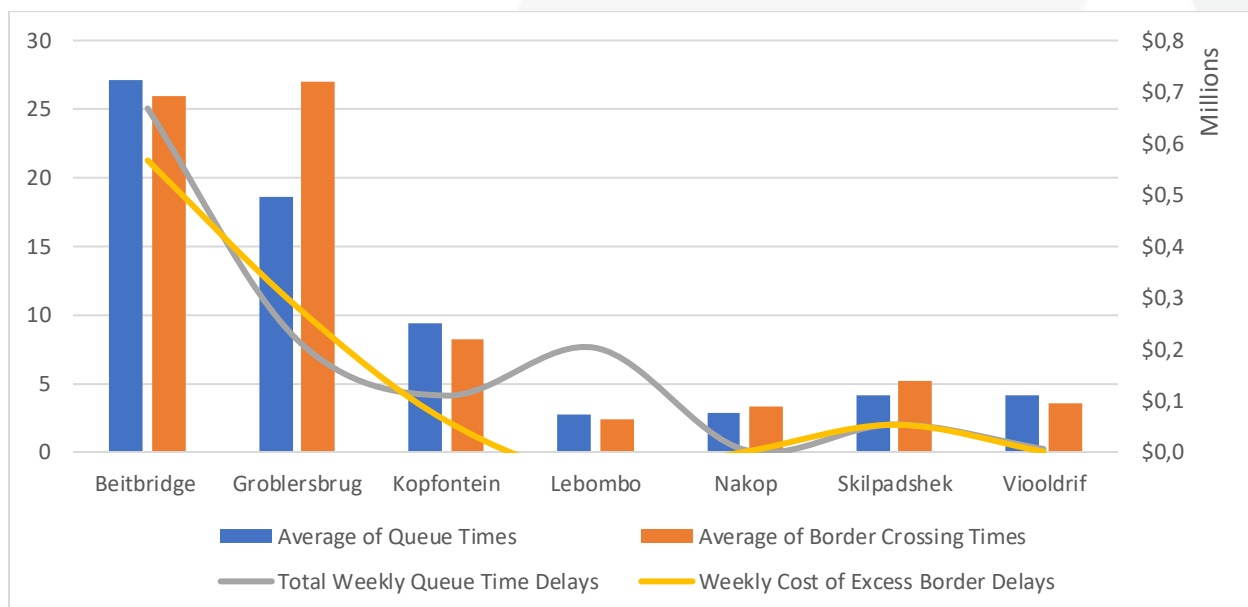
Table 7 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	15,0	3,7	14,8	9 600	2 240
Central Corridor	798	1,3	0,1	1,2	23 940	5 586
Dar Es Salaam Corridor	1 819	13,0	1,1	12,9	54 570	12 733
Maputo Corridor	2 990	1,8	0,3	1,4	89 700	20 930
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 743	7,7	1,5	11,3	112 290	26 201
Northern Corridor	2 817	0,8	0,1	0,8	92 520	21 588
Trans Caprivi Corridor	351	2,0	0,6	2,2	10 530	2 457
Trans Cunene Corridor	100	2,6	0,7	2,4	3 000	700
Trans Kalahari Corridor	116	14,4	1,5	12,2	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	13 281	4,7	0,7	5,6	406 440	94 836

Source: TLC, FESARTA, & Crickmay, week ending 15/06/2025.

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

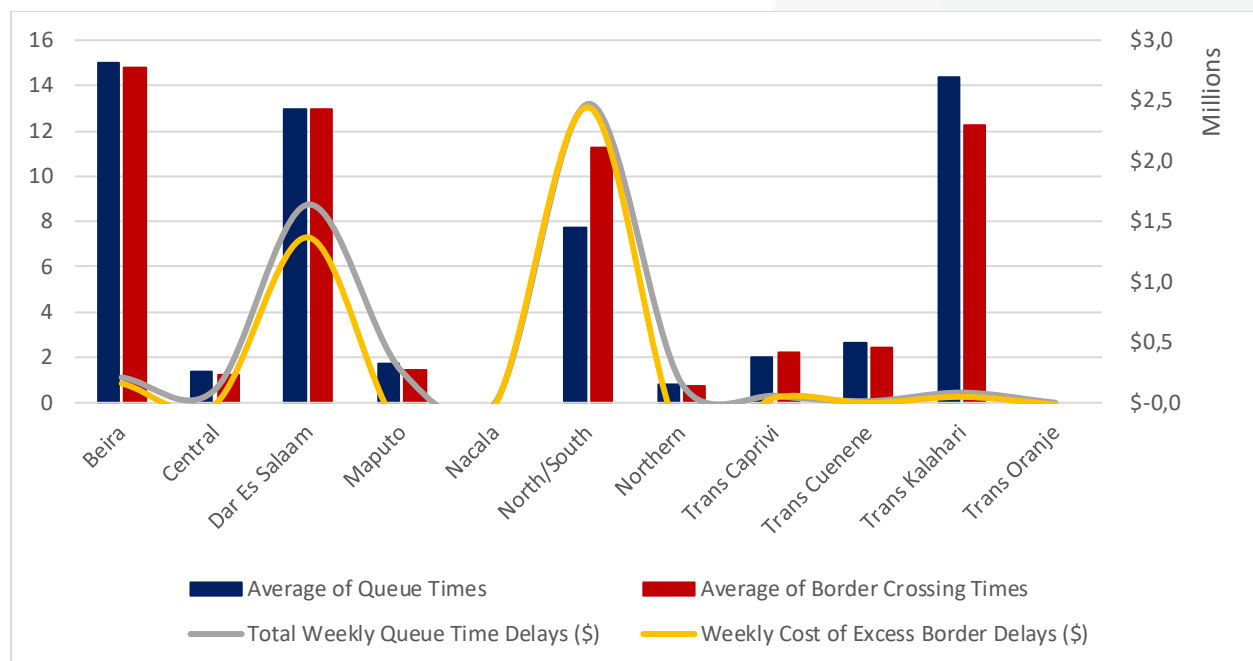
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 15/06/2025.

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 15/06/2025.

In summary, cross-border queue time averaged **~4,7 hours** (up by **~0,6 hours** from the previous week's **~4,2 hours**), indirectly costing the transport industry an estimated **\$5 million (R90 million)**. Furthermore, the week's average cross-border transit times also hovered around **5,6 hours** (up by **~1,5 hours** from the **~4,1 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 **~\$8,5 million (R152 million)**, up by **~R32 million** or **↑27%** from **~R120 million** in the previous report).

4. International Update

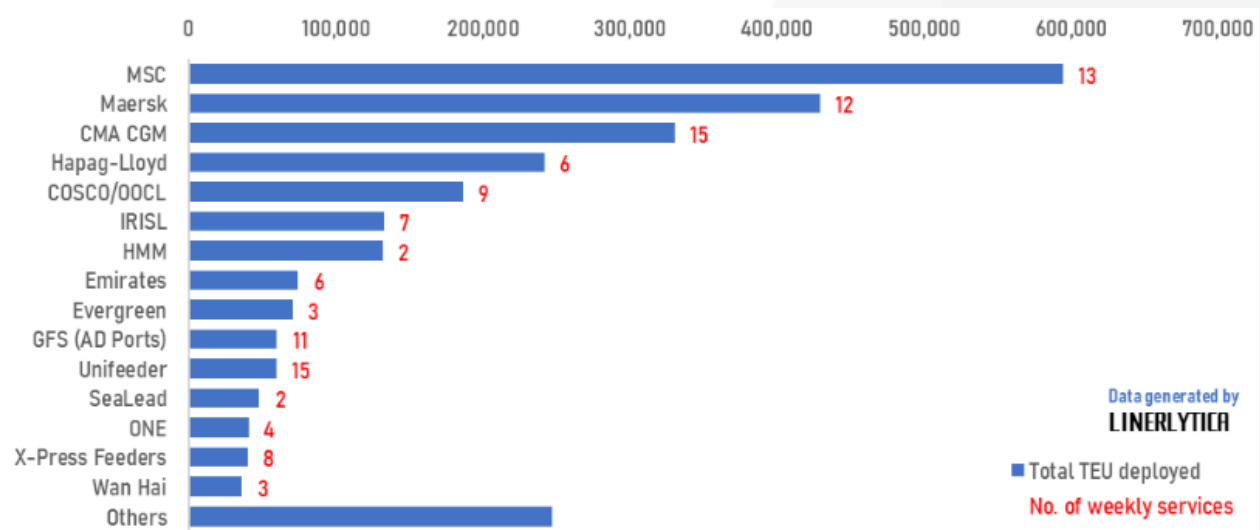
The following section provides some context around the global economy and its impact on trade, mainly an update on (a) the global shipping industry and (b) the global aviation industry.

a. Global shipping industry

i. Iran threatening to close the Strait of Hormuz

Iran's recent parliamentary vote on 22 June to potentially close the Strait of Hormuz – the maritime chokepoint through which roughly **20% of global crude oil and LNG transit daily** – has sent ripples across global trade networks. From a container-shipping perspective, approximately **3,2 million TEU** – or around **8,4% of the world's container fleet** – regularly transit this route:

Figure 15 – Total vessel capacity deployed on services in the Strait of Hormuz



Source: Linerlytica

Analysts warn that a closure could bring up to **3,4% of global box volumes** to a standstill, prompting carriers to reroute via the Suez Canal and increasing freight rates. Although liner schedules remain largely intact, insurance premiums and risk-mitigation measures are already rising. Crude oil markets reacted more sharply: immediate price spikes toward **\$120–\$130 per barrel** are plausible, even though a prolonged disruption risks undermining Iran’s own exports and economic interests. While a full Strait closure is still deemed unlikely, even the threat is reshaping container logistics and energy trade dynamics. Consequently, Drewry has drawn up some potential alternative routes (although these seem very unlikely at present):

Figure 16 – Alternative routes to bypass the Strait of Hormuz



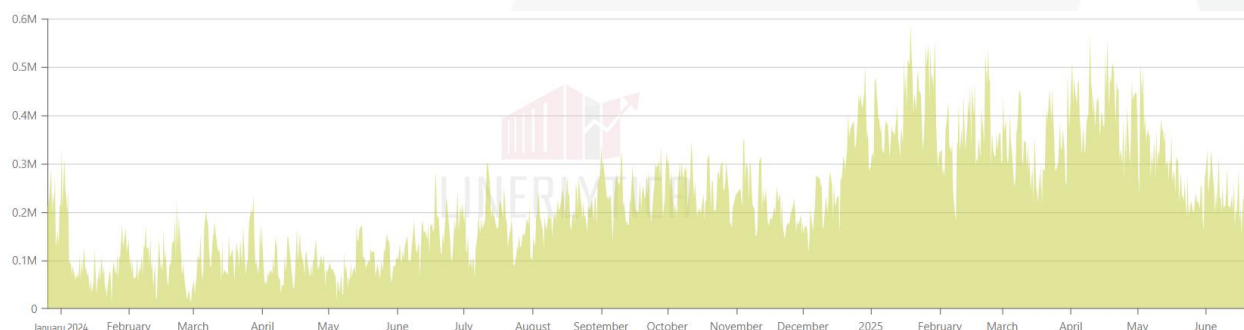
Source: Drewry

In response to the heightened risk linked to Iran–Israel hostilities, Maersk recently became the first major carrier to suspend vessel calls and cargo acceptance at Haifa, prioritising crew and cargo safety while continuing to serve Ashdod with rerouted logistics solutions. This decision has disrupted East Mediterranean container schedules and added pressure on feeder networks linking to transshipment hubs such as Port Said and Piraeus.¹¹

ii. Northern Europe throughput and congestion

Over the past two years, container throughput on the Asia–Northern Europe trade lane has surged by approximately **↑17%**, buoyed by sustained demand despite subdued economic growth across Europe.¹² Capacity has followed suit, as the Far East–Europe routes exceeded **7,9 million TEU** in May, registering an **↑11,7%** year-over-year increase. Nearly **90%** of the active fleet on these trades consists of vessels with capacities above **12 500 TEU**.¹³ However, this increase in volume has contributed to persistent port congestion throughout North European hubs. Terminals in Antwerp-Bruges, Bremerhaven, Hamburg, and Rotterdam remain severely strained—“*chock-a-block full*”—with vessel and container dwell times elevated, a situation projected to last several years.¹⁴ Although some recent reports suggest minor easing through early 2025, relief appears transient, with capacity bottlenecks likely to re-emerge during volume spikes. The accompanying graph illustrates congestion trends since early 2024, demonstrating how throughput gains have been offset by escalating terminal saturation, a challenge of considerable significance for European maritime logistics:

Figure 17 – Port congestion: Northern Europe (capacity in TEU)



Source: [Linerlytica](https://www.linerlytica.com)

iii. Global freight rates and container inventory

Drewry's "World Container Index" fell **↓7%** (or **\$264**) to **\$3 279 per 40-ft container**¹⁵ this week – its first decline in over a month – after six consecutive weeks of gains, primarily due to weakening demand for US-bound cargo. The drop suggests that the recent import surge, following the pause in higher US tariffs, is unlikely to deliver the sustained impact Drewry had anticipated.

¹¹ Van Marle, G. 20/06/2025. [Maersk suspends vessel calls at Haifa as regional tensions rises](#).

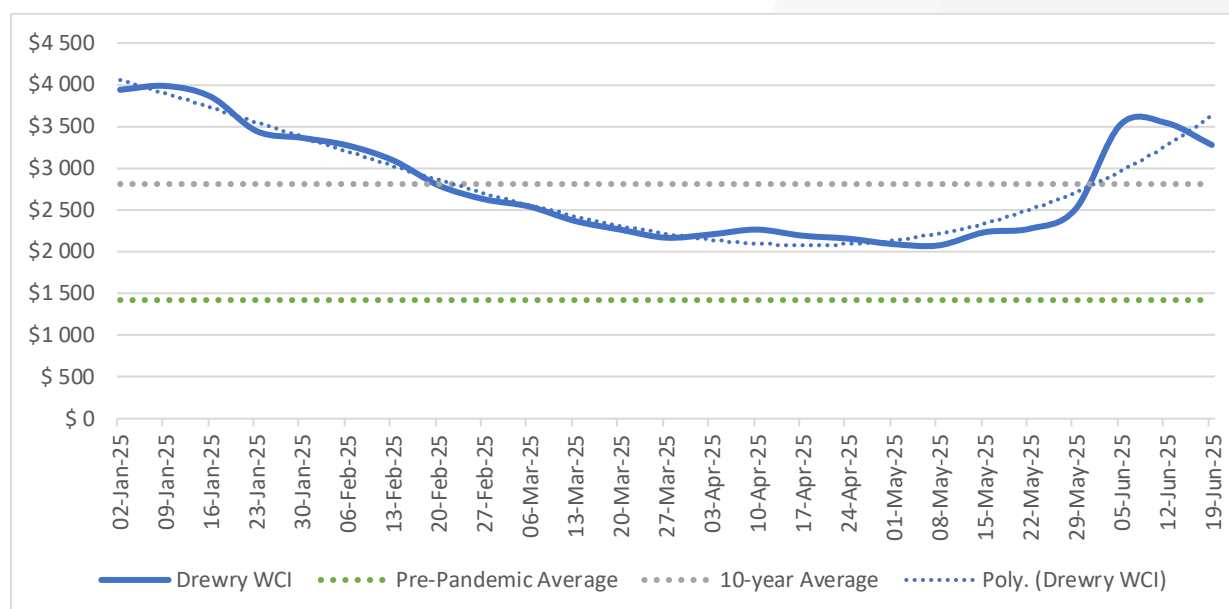
¹² Van Marle, G. 18/06/2025. [Asia-Europe container volume up 17% in two years](#).

¹³ Alphaliner. 24/06/2025. [Far East–Europe trades are on the verge of surpassing 8 Mteu in monthly capacity!](#)

¹⁴ Goldstone, C. 20/06/2025. [Port congestion in Europe ‘will last for years’ – terminals chock a block full](#).

¹⁵ Drewry. 19/06/2025. [World Container Index](#).

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



Source: Calculated from [Drewry](https://www.drewry.com/)

The major contributors were freight rates from Shanghai to New York, which decreased **↓10%**; however, spot rates are still up a significant **↑81%** compared to six weeks ago (8 May), while those to Los Angeles dropped **↓20%** this past week, but gained **↑73%** over the last six weeks. The early end to the transpacific peak season has not yet dragged down rates on the secondary routes supported by buoyant cargo volumes, while charter rates also remain firm with very limited open tonnage. However, cracks are starting to appear with EC freight futures for August trading below June prices, suggesting that the market may have already reached its peak this year.¹⁶ Lastly, as with the spot rates, the charter markets have cooled after five weeks of increases. The *Harper Petersen Index* (Harpex) traded around **2 158 points** on Friday.¹⁷

b. Global air cargo industry

In the high-frequency metrics from World ACD, European air cargo volumes declined notably in the last two weeks, registering a **↓7%** drop in chargeable weight (2w/2w), amid stagnant capacity and weakening demand. Africa's volumes, conversely, grew modestly (**↑1%**, 2w/2w), bolstered by a sharp rebound in tonnages from the UAE to West and East Africa – up **↑76%** and **↑25%** week-on-week, respectively. Overall, worldwide chargeable weight remained flat, with capacity marginally down (**↓1%**, 2w/2w):

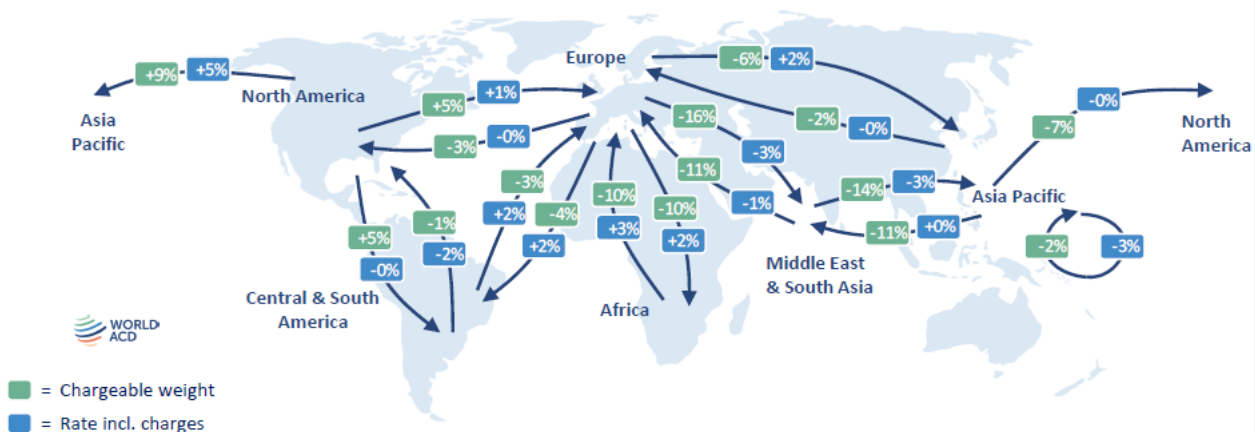
¹⁶ Linerlytica. 23/06/2025. [Market Pulse – Week 24](#).

¹⁷ Harpex. 13/06/2025. [Harper Petersen & Co Charter Rate Index](#).

Figure 19 – Region to region: chargeable weight, and rates (last 2 weeks, % change)

Region to Region
last 2 weeks

Last two weeks compared with the preceding two weeks (2Wo2W)



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

Rates remained stable at **\$2,41/kg** globally, down just **↓1%** year-on-year, although notable declines were recorded from the Middle East and South Asia (**↓4%**, w/w) and Asia Pacific (**↓5%**, y/y). Spot prices were flat but up slightly from Africa (**↑4%**, y/y), signalling continued pricing resilience in select regional corridors.

The industry is cautious over the developments in the Middle East, as recent suspensions of Middle East carrier services, including Qatar Airways, Emirates and KLM, have sharply reduced regional airfreight capacity – routes through Doha, Dubai and Riyadh are notably disrupted.¹⁸ This squeeze, driven by geopolitical tensions and airspace closures, is expected to shift some freight onto longer diversionary routings, putting upward pressure on rates. In turn, European and African corridors may see secondary impacts as capacity realigns, potentially keeping rates elevated even amid volume declines.

ENDS¹⁹

¹⁸ Lennane, A. 20/06/2025. Middle East airfreight capacity plummets as carriers suspend services.

¹⁹ **ACKNOWLEDGEMENT:**

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