

Cargo Movement Update #237¹

Date: 8 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)	39 963	45 530	85 493	39 286	44 757	84 043	↑2%
Air Cargo (tons)	4 015	2 306	6 321	4 165	2 730	6 895	↓8%

Monthly Snapshot

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

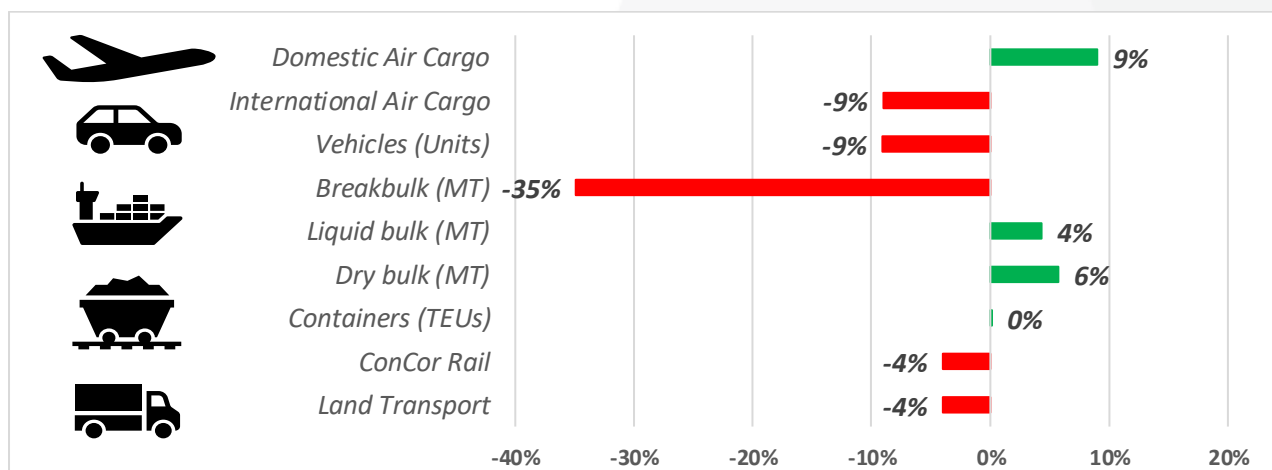
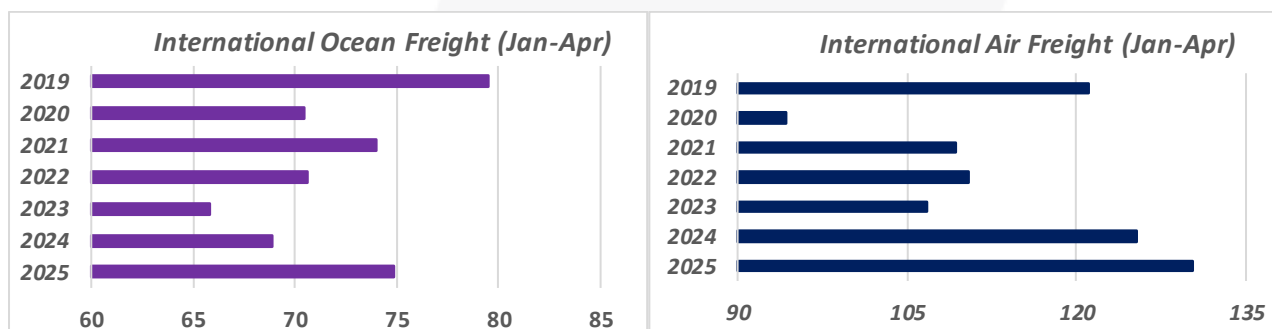


Figure 2 – Year-to-date flows 2019-2025⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~12 213 TEUs was handled per day, with ~12 275 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 3 468 containers, up by ↑45% from last week.
- Cross-border queue: ↓1,3 hrs; transit: ↓1,1 hrs; SA borders: 8,4 hrs (↓18%); SADC: 4,7 hrs (no change).
- Global container throughput – led by the US – dropped in April (↓4,5%), but remains up yearly (↑5,8%).
- Global spot rates increased by the second largest ever margin – ↑41% (or \$1 019) to \$3 527/40ft.
- Global air cargo tonnages rebounded in May with a ↑4% (m/m) rise, offsetting April's ↓7% decline.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 237th 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: Apr vs Apr.

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 **12 213 TEUs** was handled daily, increasing slightly from **12 006 TEUs** the previous week. Port Operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages. Adverse weather and equipment challenges ensured operational disruptions at the Port of Cape Town. In contrast, the main operational constraints in Durban proved to be continuous equipment breakdowns and adverse weather. Inclement weather and vacant berths mainly impacted operations at our Eastern Cape Ports; however, minimal delays were reported at the Port of Richards Bay this week. Berth IV7 at the Island View terminal is expected to be out of commission for the next two weeks due to maintenance operations and is anticipated to be recommissioned around 24 June. Additionally, the latest reports from TFR suggest that the service on the Central Corridor line was suspended on Friday for undisclosed reasons. Although no reasons were provided by TFR, a strong assumption could be made that the suspension of rail activities could have been due to cable theft incidents, which have been prominent in the area recently.

Global container volumes dipped by **↓4,5%** month-on-month in April following March's peak, though annual growth remains strong at **↑5,8%**. North American imports fell sharply (**↓11,5%**) amid tariff-driven uncertainty, contributing to a record **55,5%** narrowing in the US trade deficit. Sub-Saharan Africa showed resilience, with imports up **↑2%** monthly and **↑18,7%** annually; South Africa's April share was **18%** of SSA imports and **43%** of exports – significantly lower than previous; however, these figures are expected to be overturned next month. Freight rates surged, though market correction is expected. Container availability remains high, with China's inventory reaching a record **1,55 million TEU**, easing supply concerns for now.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **573 541 kg** inbound (**↓4%**, w/w) and **329 492 kg** outbound (**↓16%**). Last week, we saw a slight reduction after several weeks of prolonged high volumes. Nevertheless, the current volumes are still up on last year's levels (**↑8%**, y/y), but slightly below the comparative levels of pre-pandemic 2019 (**↓5%**). Internationally, air cargo tonnages rebounded in May with a **↑4%** month-on-month rise (and a similar yearly surge), offsetting April's **↓7%** decline. Rates rose by **↑3%** (w/w) to **\$2,44/kg**, as the China–US lane remained volatile.

Cargo movements along the N4 corridor decreased for road and were stable for rail, with truck volumes through the border post at **1 440 HGVs per day** (**↓5%**, w/w). There was a slightly decreased average of **2,9 hours'** (**↓19%**) worth of queuing time at the border, as the average processing time also decreased – to around **2,6 hours** (**↓24%**) per crossing. The rail to Maputo was stable at an average of **eight trains daily**. Sugar trains from Eswatini were stable at around **two trains a day**. Monthly rail flows show a slight increase of **↑13%** (m/m) from Ressano to Maputo and **↑4%** from Goba to Maputo.

Crossing times decreased slightly at several borders throughout the SADC region. Overall, the average queue time decreased by around **hour and a half** from last week, while transit time decreased by around **an hour**. The median border crossing times at South African borders decreased by nearly **two hours**, averaging **~8,4 hrs** (**↓18%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs (no change)**. On average, two SADC borders took more than a day to cross last week, namely Beitbridge and Kasumbalesa (the worst affected, with an average of a **day and a quarter from the Zambian side**). Other developments include delays and constraints from **(1) South Africa, (2) Zimbabwe, and (3) Zambia**.

Lastly, this week's most consequential development is the World Bank's **R26,5 billion loan** to support South Africa's logistics network restructuring.⁶ The financing takes the form of a Development Policy Loan (DPL), aimed at enabling structural reforms and institutional improvements rather than project-specific investments. Aligned with the National Freight Logistics Roadmap and recent Logistics Accountability Score initiatives, the loan underlines international confidence in the sector's reform trajectory. Over the past three weeks, our reporting has highlighted incremental improvements in cargo throughput and cross-border transit, amidst persistent structural constraints. The World Bank facility marks a pivotal opportunity to stabilise Transnet, address rail and port inefficiencies, and crowd in additional sectoral participation. Ultimately, this injection of capital and confidence must be matched with effective implementation, accelerating reforms and restoring South Africa's role as a competitive regional gateway.

⁶ Burkhardt, P. 09/06/2025. [SA secures R26.5bn World Bank infrastructure loan](#).

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	14
4. International Update.....	17
a. Global shipping industry	17
i. Global container trade statistics for April and Port Throughput Index.....	17
ii. Global freight rates and container inventory	19
b. Global air cargo industry	21

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 2 to 8 June (measured in TEUs)

7-day flow reported (09/06/2025 – 08/06/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 215	29 503	↓6%
New Pier (Pier 1)	1 762	12 331	↓20%
Cape Town Container Terminal	2 215	15 504	↑23%
Ngqura Container Terminal	2 441	17 085	↑8%
Port Elizabeth Container Terminal	502	3 511	↑18%
Other	1 080	7 559	↑30%
Total	12 213	85 493	↑2%

Source: Calculated from TPT, 2025. Updated 08/06/2025.

An increased average of ~**12 213 TEUs (↑2%)** was handled per day for the last week (2 to 8 June, Table 2), slightly below the projected average of ~**12 275 TEUs (↓1%** actual versus projected).

For the coming week, a slightly increased average of ~**12 275 TEUs (↑1%)** is predicted to be handled (9 to 15 June, Table 3). This week, port operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages.

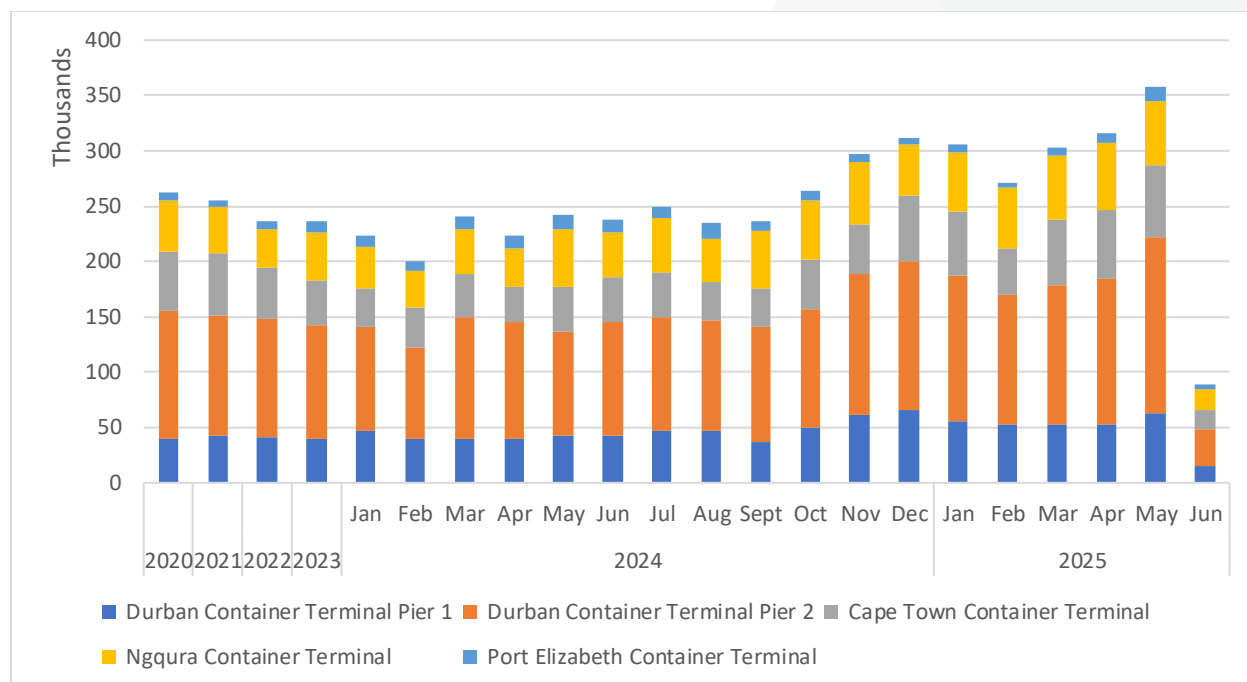
Table 3 – Container Ports – Weekly flow projected for 9 to 15 June (measured in TEUs)

7-day flow projected (09/06/2025 – 15/06/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 208	36 459	↑24%
New Pier (Pier 1)	1 996	13 975	↑13%
Cape Town Container Terminal	1 698	11 887	↓23%
Ngqura Container Terminal	2 064	14 447	↓15%
Port Elizabeth Container Terminal	444	3 110	↓11%
Other	864	6 047	↓20%
Total	12 275	85 925	↑1%

Source: Calculated from TPT, 2025. Updated 08/06/2025.

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 08/06/2025.

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 (5 May to present; day on the day)

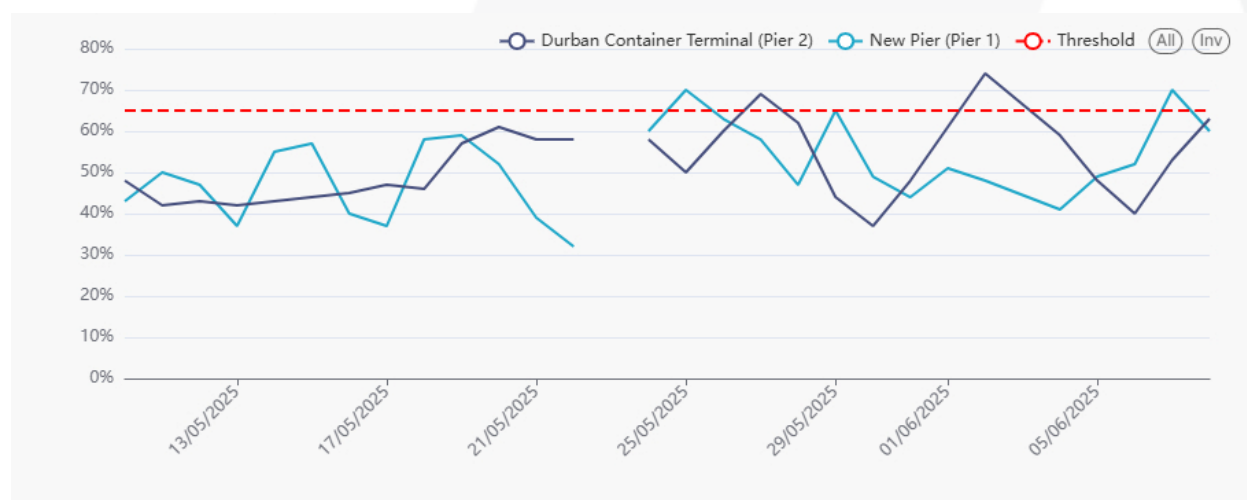
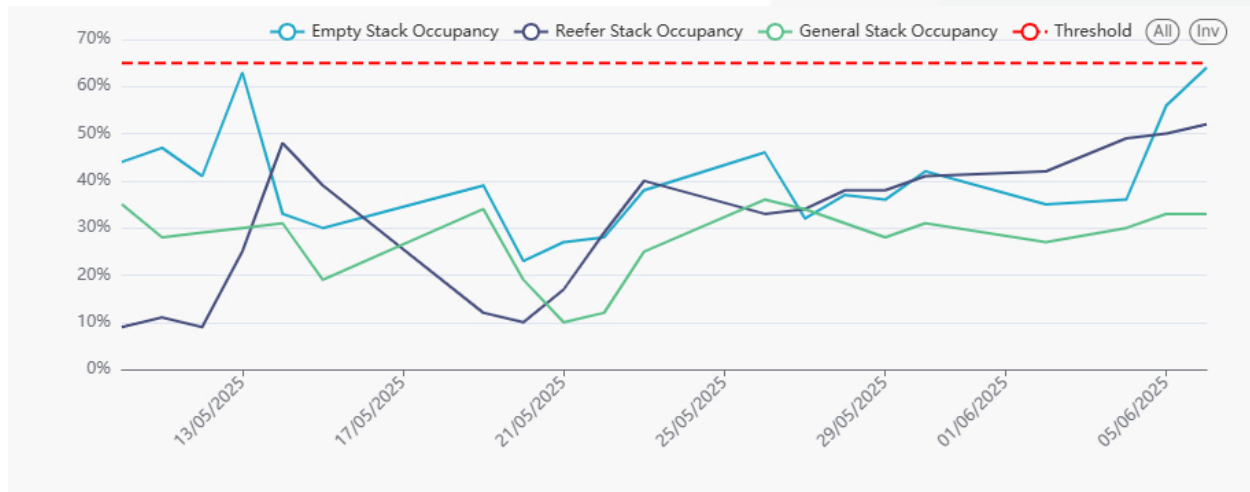


Figure 5 – Stack occupancy in CTCT, GP, reefer, and empty stack (5 May to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 08/06/2025.

b. Summary of port operations

i. Weather and other delays

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

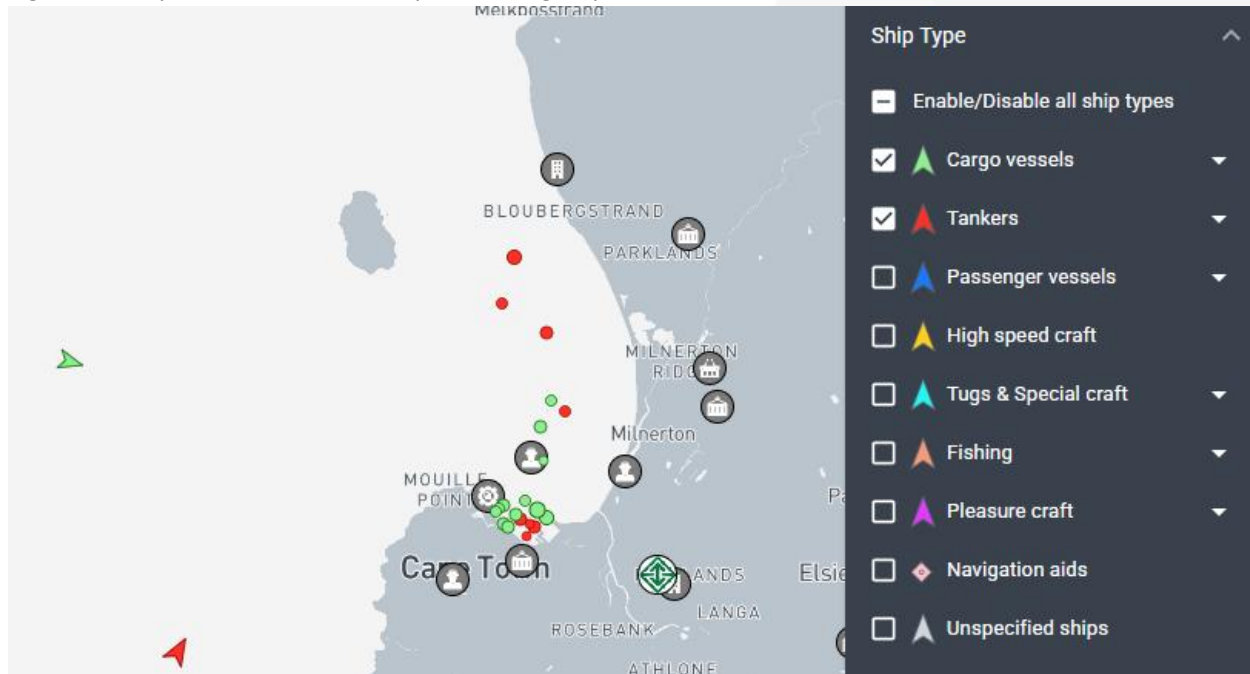
ii. Cape Town

On Friday, CTCT recorded three vessels at berth and two at anchor, as adverse weather and equipment challenges proved to be the primary operational constraint. On the landside, between Monday and Friday, the terminal managed to service at least 5 025 trucks while handling approximately 156 rail units. On the waterside, the terminal executed approximately 7 054 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 33%, reefers at 52%, and empties at 64%**. Additionally, the terminal operated with **nine STS cranes, 19 RTGs, and 60 hauliers** towards the end of the week. Earlier in the week, a truck collided with an RTG, resulting in operational delays at the terminal.

On Friday, CTMPT recorded two vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 3 491 tons and 227 container moves on the waterside. On the landside, 234 trucks were processed during the same period. Stack occupancy was recorded at 28% for general cargo, 45% for reefers, and 15% for empties. Towards the end of the week, the terminal operated with three cranes with only two operational spreaders and four straddle carriers. Adverse weather and equipment challenges proved to be the main operational constraints at the terminal.

The FPT terminal handled six vessels between 26 May and 1 June: three multi-cargo, one dry bulk, one container, and one steel vessel. Berth occupancy during this period was recorded at 71%. The terminal planned to handle seven more vessels between 2 and 8 June, with another eight vessels scheduled between 9 and 15 June. Inclement weather and the late arrival of cargo and transporters accounted for the most significant operational constraints during this period.

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



Source: Marine Traffic. Updated 09/06/2025 at 14:00.

iii. Durban

On Friday, Pier 1 recorded one vessel on berth, with zero vessels at anchor. Stack occupancy was **57% for GP containers** and **46% for reefers**. Between Monday and Friday, the terminal executed at least 6 355 gate moves and 249 rail moves on the landside. The **average TTT** for the week was **~63 minutes (↑7%, w/w)** and an average **staging time** of **~37 minutes (↑23%)**. Additionally, the terminal moved over 4 586 TEUs across the quay on the waterside during the same period. The terminal had **four STS cranes** and **18 RTGs** available towards the end of the week.

Pier 2 had two vessels on berth and two at anchorage on Friday, as equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **40% for GP containers** and **37% for reefers**. The terminal operated with **nine gangs** and moved over 15 600 containers across the quay between Monday and Friday on the waterside. Approximately 10 134 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~63 minutes (↑11%, w/w)** and a staging time of **~43 minutes (↓4%)**. Approximately 1 367 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **71** and **78** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **84%** during this period. For the most significant part of the week, the terminal merely had three working vessels on the berth due to components for the second batch of cranes being offloaded at berth 108.

Durban's MPT terminal recorded two vessels at berth on Friday and none at outer anchorage. Stack occupancy for containers was recorded at 14%, the reefer stack at 28%, and the breakbulk stack at 2%. In the preceding 24 hours, 503 containers were handled on the waterside. On the landside, 458 container trucks were serviced at a TTT of ~27 minutes. During this period, two cranes, eight reach stackers, seven forklifts, and 19 ERFs were in operation. The third crane remained out of commission for the most significant part of the week for a gearbox replacement and is anticipated to return to service over the weekend.

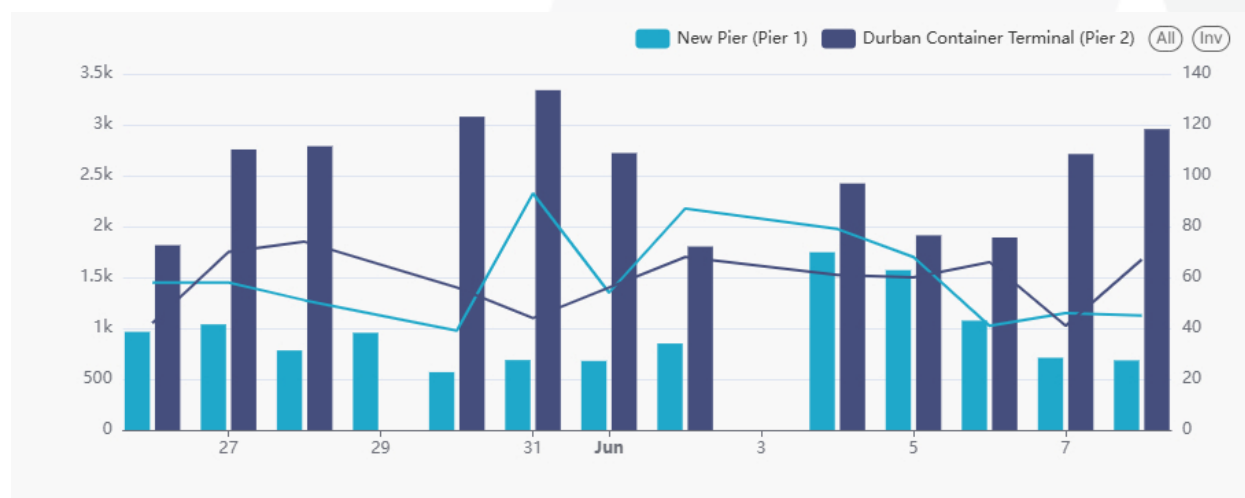
Between Thursday and Friday, the Maydon Wharf MPT recorded one vessel at berth and zero at anchorage. On the waterside, the terminal managed to handle 2 448 tons, while 62 trucks, containing approximately 2 154 tons, were serviced on the landside. The terminal also handled 22 rail wagons, translating to 1 039 tons. The agri-bulk facility recorded zero vessels at berth or anchor during the same period. As a result, no volumes were handled on the waterside. However, on the landside, the terminal managed to handle 62 trucks, containing approximately 1 298 tons.

On Friday, the Ro-Ro terminal in Durban recorded zero vessels on the berth, with none at anchorage. In the preceding 24 hours, the terminal handled 467 road units, but zero units on rail on the landside, and 635 units on the waterside. Overall stack occupancy was 49%, 20% at Q&R, and 40% at G-berth. During this period, the terminal had 109 high-and-heavy (abnormal loads) on hand and managed to handle six.

Due to maintenance operations, Berth IV7 at the Island View terminal is expected to be out of commission for the next two weeks. 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 terminals.

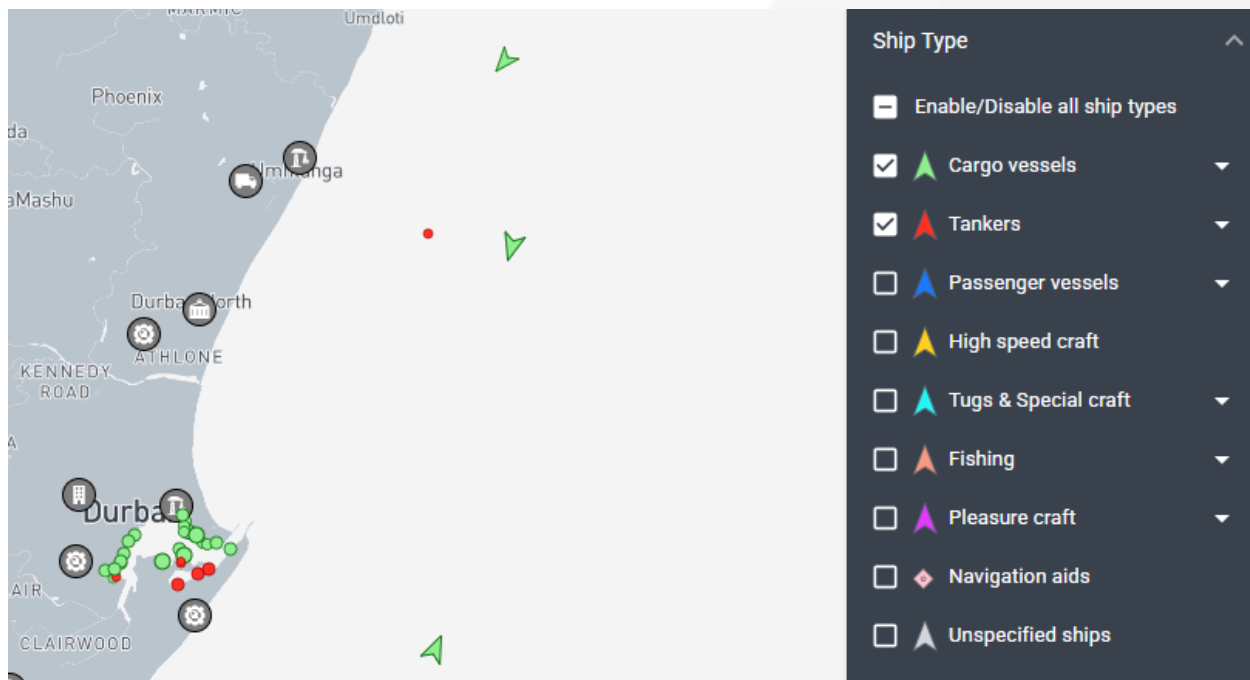
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 08/06/2025.

The queue of container vessels waiting outside Durban has stayed steady from last week. On Monday evening (9 June), **one** container vessel was waiting outside at anchorage for Pier 1, **one** for Pier 2, and **none** for Point. The queue of dry (**two**), liquid (**five**), and breakbulk (**none**) vessels has remained stable slightly from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 09/06/2025 at 14:00.

iv. Richards Bay

On Monday (9 June), the Port of Richards Bay had eight vessels at anchor and 11 on the berth, translating to five vessels at DBT, five at MPT, one at RBCT, but none at the liquid bulk terminal. At the start of the week, two tugs, one pilot boat, and one helicopter operated for marine resources. The daily average for the week increased to around **177 682 tons** (↓9%, w/w). An average of **19 trains** (down by **two** 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 one 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. Stack occupancy figures were recorded at 35% for reefers, 77% for reefer ground slots, and 54% for the general stack. Despite having a vacant berth for around ten hours, the terminal handled approximately 2 778 TEUs and 360 reefers on the waterside. Approximately 627 trucks were processed on the landside at a TTT of ~33 minutes. Towards the end of the week, the terminal had five STS cranes, 25 RTGs, and 50 hauliers in service.

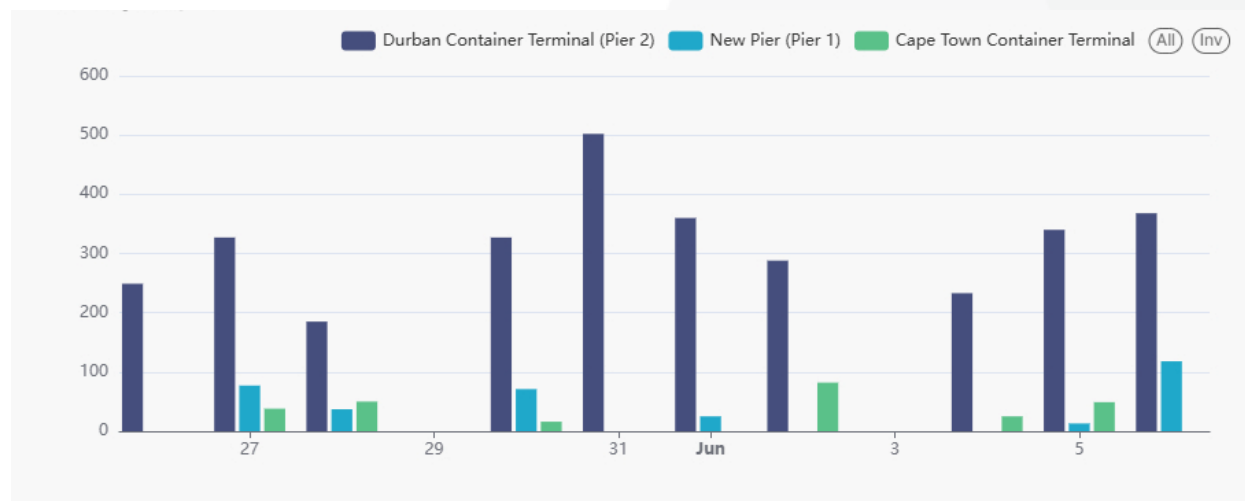
On Friday, GCT had zero vessels at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 193 trucks were processed at a TTT of ~23 minutes on the landside, while 730 TEUs and 79 reefers were handled across the quay on the waterside. Stack occupancy was recorded at 60% for the general stack, 23% for reefers, and 64% for reefer ground slots.

On Friday, the Ro-Ro terminal had one vessel on berth and none at outer anchorage. In the 24 hours before, the terminal handled 925 units, resulting in a stack occupancy figure of 33%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that the service on the Central Corridor line was suspended on Friday for undisclosed reasons. Although no reasons were provided by TFR, a strong assumption could be that the suspension of rail activities could have been due to cable theft incidents in the area. The line was recommissioned on Friday; however, intermittent cable theft continued over the weekend. Additionally, towards the end of the week, DCT Pier 2 had 199 ConCor units on hand with a dwell time of 144 hours and 309 over-border units with a dwell time of 58 days.

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



Source: Calculated using data from Transnet, 2024. Updated 08/06/2025.

In the last week (2 to 8 June), rail cargo on the ConCor line out of Durban was reported at **2 384** containers, up **↑45%** from the previous week's **3 468** 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 26 May. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in May 2024 averaged **~838 541 kg** daily.

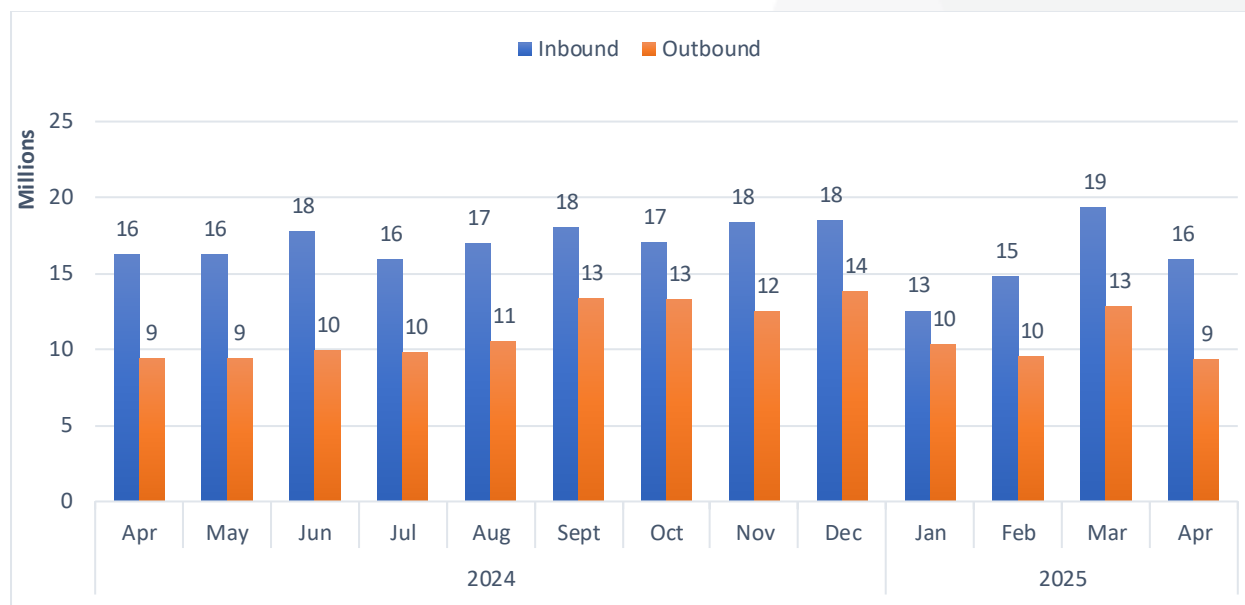
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	26-May	27-May	28-May	29-May	30-May	31-May	01-Jun	Week
Volume inbound	472 223	216 076	379 233	296 295	353 324	2 007 837	289 800	4 014 788
Volume outbound	126 661	156 018	178 481	152 085	217 042	1 186 426	289 732	2 306 445
Total	598 884	372 094	557 714	448 380	570 366	3 194 263	579 532	6 321 233

Courtesy of ACOC. Updated: 08/06/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **573 541 kg** inbound (**↓4%**, w/w) and **329 492 kg** outbound (**↓16%**). Last week's volume was slightly reduced after several weeks of prolonged high volumes. Nevertheless, the current volumes are still up on last year's levels (**↑8%**, y/y), but slightly below the comparative levels of pre-pandemic 2019 (**↓5%**). The following figure shows the international air cargo flows to and from OR Tambo since the start of last year:

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

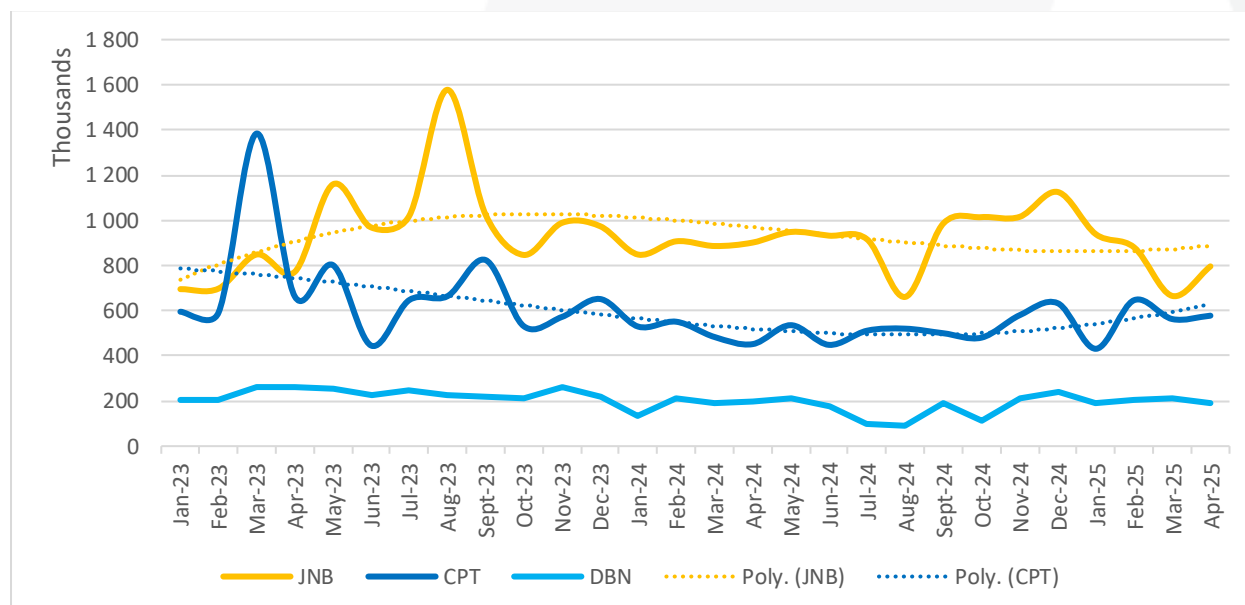


Calculated from ACOC. Updated: 08/06/2025.

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: 08/06/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (2 to 8 June), cargo movements along the N4 corridor decreased for road and were stable for rail. The following notes summarise the recent developments:

- Truck volumes through the border post at **1 440 HGVs per day** (↓5%, w/w).
- There was a slightly decreased average of **2,9 hours'** (↓19%) worth of queuing time at the border, as the average processing time also decreased – to around **2,6 hours** (↓24%) per crossing.
- The rail to Maputo was stable at an average of **eight trains daily**. Sugar trains from Eswatini were stable at around **two trains a day**.
- Monthly rail flows show a slight increase of **↑13%** (m/m) from Ressano to Maputo and **↑4%** from Goba to Maputo.

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

Table 5 – Lebombo border post update

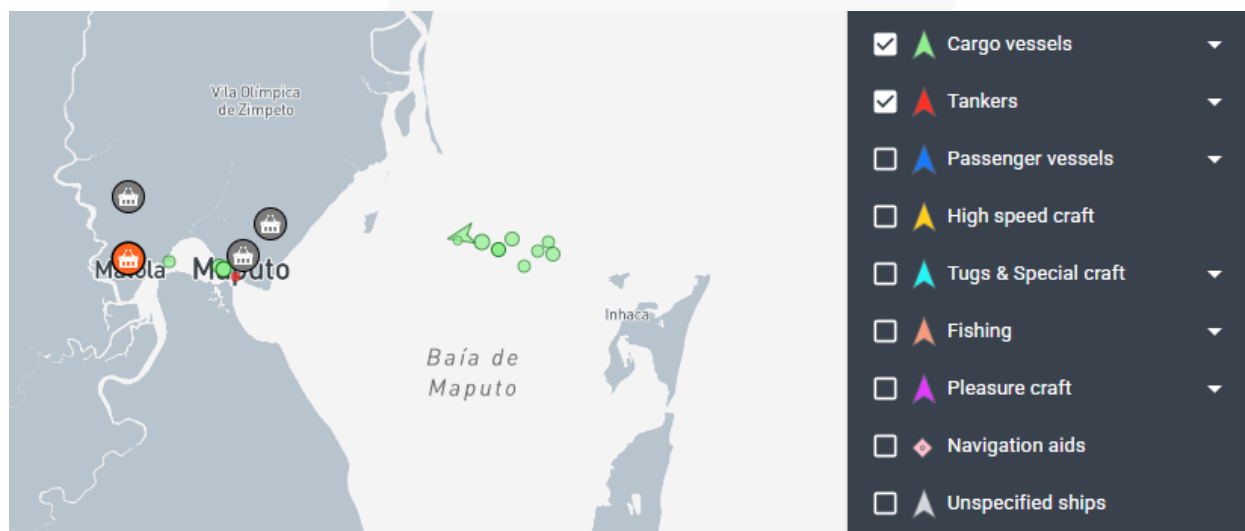
Date 06h00 Daily	Total Trucks Entering KM4	Total Trucks Exit KM4	Mineral Trucks	General Cargo (incl. critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Total Trucks inside KM4 staging	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo
Design Capacity	1 500	1 500	1 200	200	n/a	50	50	2 000	20	10	6	4
02-Jun-25	1 306	1 270	1 132	92	14	63	10	270	7	6	*	1
03-Jun-25	1 415	1 398	1 043	237	45	57	14	287	10	9	*	1
04-Jun-25	1 377	1 379	921	272	57	100	29	331	9	8	*	1
05-Jun-25	1 610	1 468	1 080	287	65	84	47	321	14	12	*	2
06-Jun-25	1 457	1 533	998	299	82	103	51	247	7	5	*	2
07-Jun-25	1 515	1 471	1 016	309	42	79	21	253	9	7	*	2
08-Jun-25	1 403	1 458	1 101	196	36	65	60	207	10	8	*	2
% of design capacity	96%	95%	87%	121%	n/a	157%	66%	14%	47%	79%	n/a	39%
% change (d/d)	-7%	-1%	8%	-37%	-14%	-18%	186%	-18%	11%	14%	n/a	0%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 08/06/2025.

* = 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 09/06/2025 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 decreased by around **hour and a half** from last week, while transit time decreased by around **an hour**.
- The median border crossing times at South African borders decreased by nearly **two hours**, averaging **~8,4 hrs (↓18%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs (no change)**.

1. South Africa:

- a. Disruptions were reported on **Friday, 31 May**, at the Cross-Border Road Transport Agency (CBRTA) offices due to strike action.
- b. Further unrest occurred on **Monday, 2 June**, with the **N3 fully closed** in both directions due to protest action by an ATDF-affiliated group.
- c. Protest activity disrupted movement on the **N1 at Matoks on Friday**, resulting in full road closures.

2. Zimbabwe:

- a. Tensions with the ZRP Anti-Smuggling Unit have escalated, prompting FESARTA to launch a media campaign after a transporter, cleared at Beitbridge and carrying only bicycle parts, was inexplicably stopped 50 km north of the border and sent back for further inspection.
- b. No legitimate reason was found upon re-examination.
- c. Additionally, **Bulawayo** has banned vehicles exceeding 9 tonnes from entering the CBD.
- d. Truck drivers are advised to avoid stopping in town and use designated truck stops outside the city.

3. Zambia:

- a. Transporters have raised repeated concerns over **Zambian Police halting foreign-registered trucks** on the grounds of **insufficient onboard medical supplies**, with no standard guidance provided.

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

Table 6 – Delays⁷ summary – South African borders (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	495	24,0	7,0	24,0	14 850	3 465
Beitbridge	Zimbabwe-SA	463	1,1	2,3	10,6	13 890	3 241
Groblersbrug	SA-Botswana	238	12,1	1,2	12,1	7 140	1 666

⁷ Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.

⁸ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

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
Martin's Drift	Botswana-SA	218	2,4	0,4	2,2	6 540	1 526
Kopfontein	SA-Botswana	230	8,4	1,5	8,3	6 900	1 610
Tlokweng	Botswana-SA	21	0,5	0,2	0,3	630	147
Vioolsdrift	SA-Namibia	30	4,2	2,3	4,2	900	210
Noordoewer	Namibia-SA	20	1,8	0,4	1,5	600	140
Nakop	SA-Namibia	30	3,7	0,5	3,4	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,4	1,1	600	140
Skilpadshek	SA-Botswana	262	4,7	1,5	4,4	7 860	1 834
Pioneer Gate	Botswana-SA	45	0,0	0,0	0,0	1 350	315
Lebombo	SA-Mozambique	1 517	1,2	0,2	1,1	45 510	10 619
Ressano Garcia	Mozambique-SA	1 465	2,9	0,6	2,6	43 950	10 255
Sum/Average		5 054	4,9	1,3	5,4	151 620	35 378

Source: TLC, FESARTA, & Crickmay, week ending 01/06/2025.

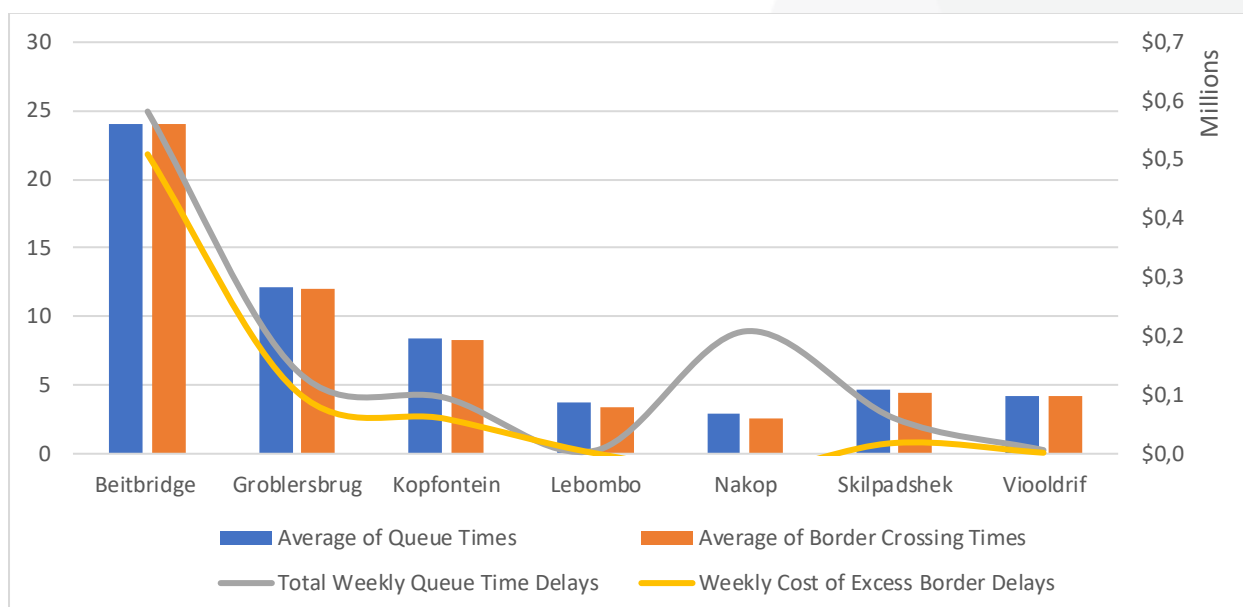
Table 7 – Delays summary – Corridor perspective

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	10,4	4,0	10,2	9 600	2 240
Central Corridor	798	0,2	0,1	0,2	23 940	5 586
Dar Es Salaam Corridor	1 819	7,6	0,8	7,6	54 570	12 733
Maputo Corridor	2 982	2,1	0,4	1,8	89 460	20 874
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 737	7,6	1,3	7,8	112 110	26 159
Northern Corridor	2 817	1,3	0,1	1,2	92 520	21 588
Trans Caprivi Corridor	337	2,0	0,6	1,8	10 110	2 359
Trans Cunene Corridor	100	2,7	0,9	2,6	3 000	700
Trans Kalahari Corridor	116	19,9	3,6	19,8	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	13 253	4,2	0,8	4,2	405 600	94 640

Source: TLC, FESARTA, & Crickmay, week ending 01/06/2025.

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

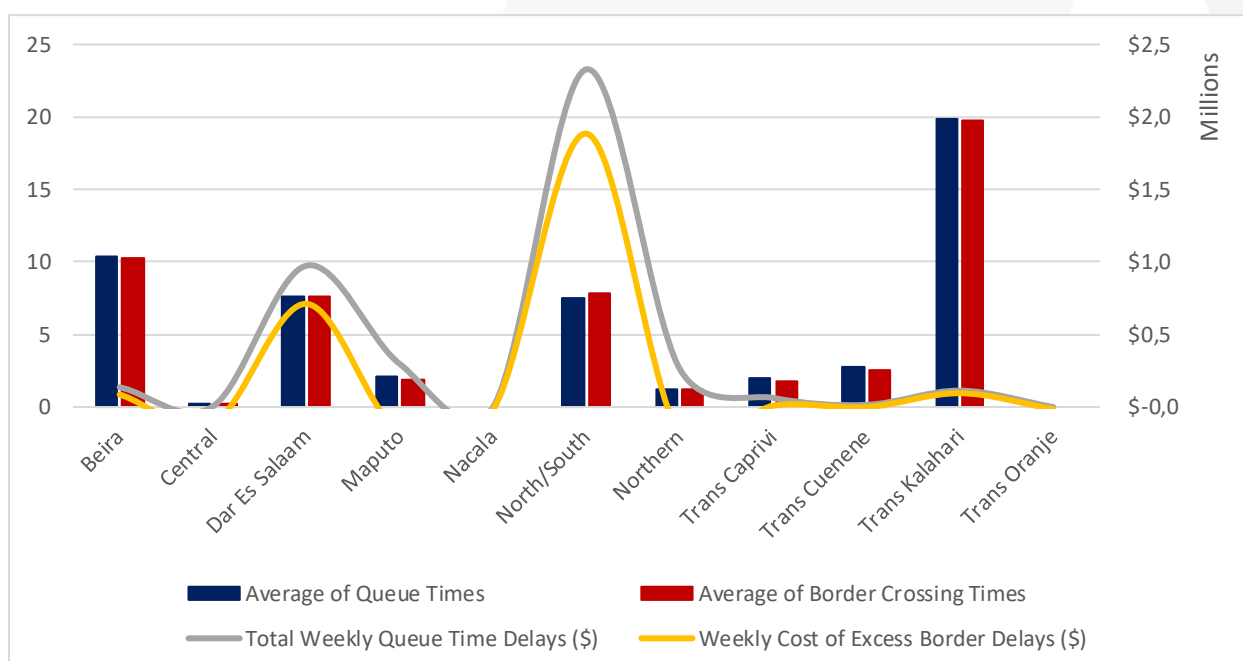
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 01/06/2025.

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 01/06/2025.

In summary, cross-border queue time averaged **~4,2 hours** (down by **~1,3 hours** from the previous week's **~5,5 hours**), indirectly costing the transport industry an estimated **\$4,2 million (R74 million)**. Furthermore, the week's average cross-border transit times also hovered around **4,2 hours** (down by **~1,1 hours** from the **~5,3 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$2,3 million (R40 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$6,5 million (R115 million)**, down by **~R53 million** or **↓32%** from **~R168 million** in the previous report).

4. International Update

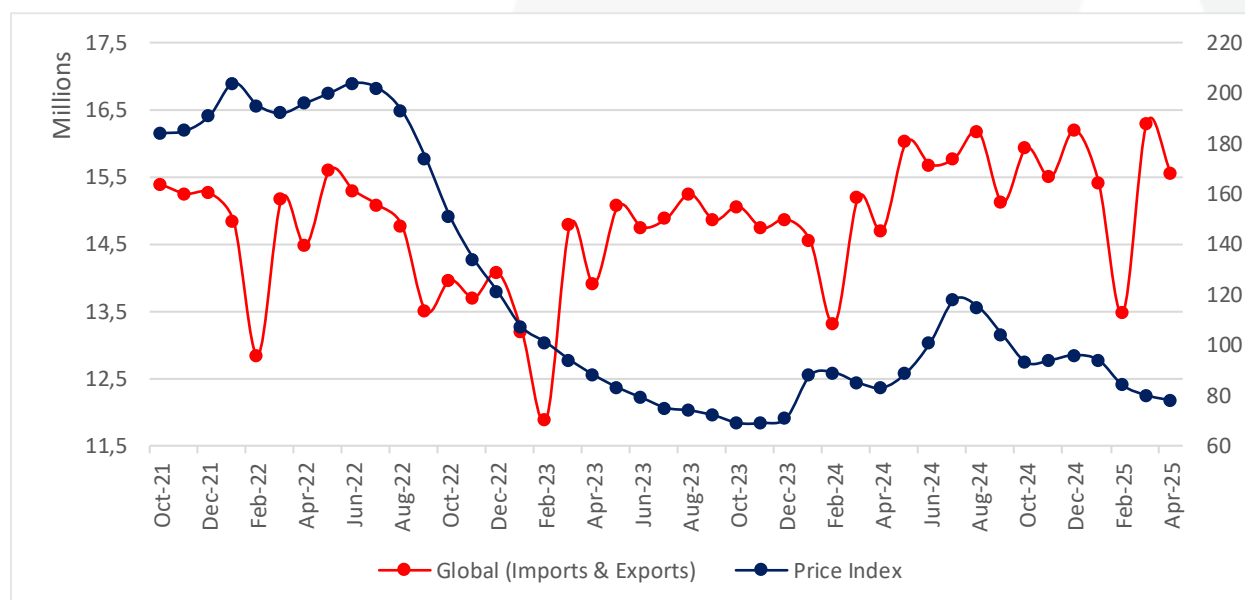
The following section provides some context around the global economy and its impact on trade, mainly an update on (a) the global shipping industry and (b) the global aviation industry.

a. Global shipping industry

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

The latest container throughput figures for April from *Container Trade Statistics* (CTS) show that container volume had its typical cyclical drop after record throughput was registered in March. April is down by **↓4,5%** monthly but still up by **↑5,8%** (y/y) annually. All trade lanes experienced decreases in April, with North American imports dropping expectantly the most at **↓11,5%**, as an evident consequence of the tariff imposition and uncertainty surrounding US trade policy. Indeed, Bloomberg reported this week that the US trade deficit narrowed sharply in April by a record **55,5%** to **\$61,6 billion**, its smallest level since 2023, driven by an unprecedented **↓16,3%** plunge in imports and a **↑3%** rise in exports.⁹ This abrupt shift reflects the unwinding of earlier front-loading by firms ahead of tariff hikes in Trump's trade war, far surpassing economists' expectations of a **\$66 billion deficit**. According to CTS, North American exports also experienced a decline of **↓6,6%**. The global price index (dry and reefer combined) decreased in April by **↓2,5%** monthly and **↓6%** yearly. The following figure illustrates the global container throughput and price index since October 2021:

Figure 15 – Global Containerised Throughput (TEUs) and price index

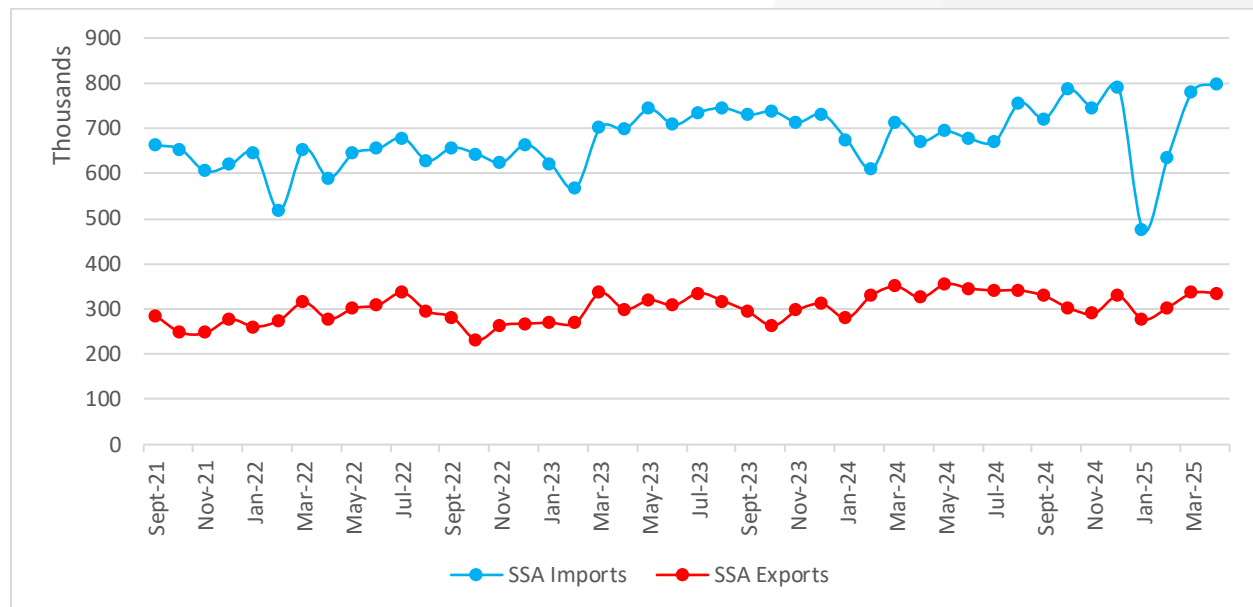


Source: Calculated from [CTS](#)

Container throughput in April reached **15,5 million TEUs** – some **700 thousand containers** below the record level of the previous month. The following figure shows Sub-Saharan African trade over the same period, with a **↑2%** (m/m) increase in containers imported, and a stable flow in containers exported:

⁹ Ahasan, N. 05/06/2025. [US Trade Deficit Narrows by Most on Record as Imports Plunge](#).

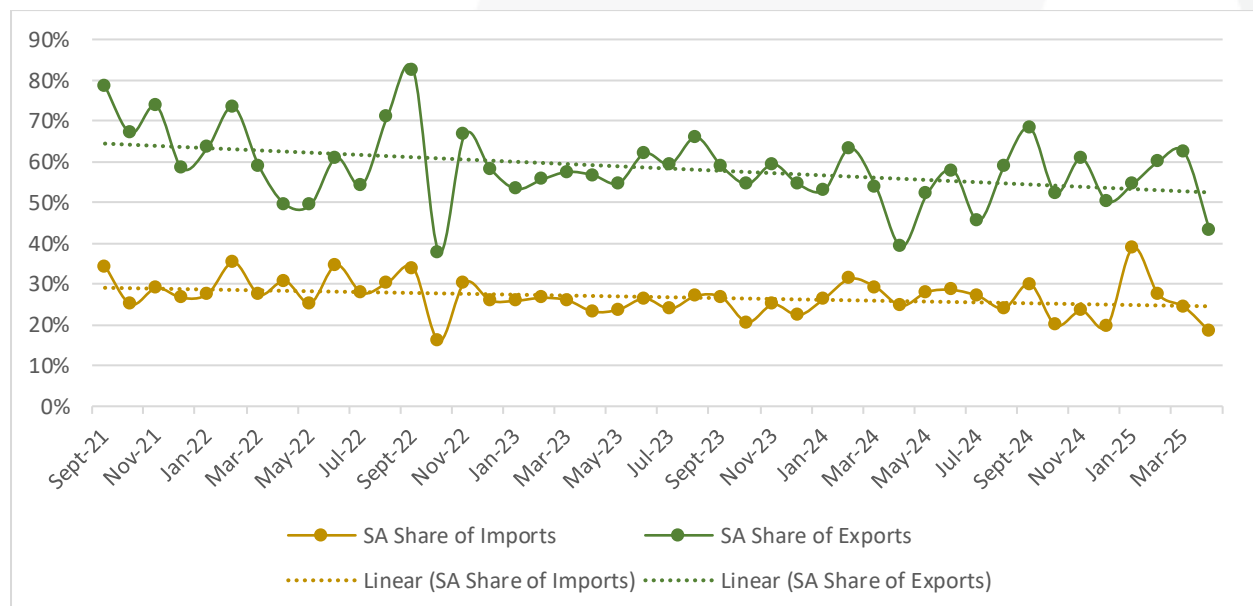
Figure 16 – Sub-Saharan Africa Containerised Throughput (TEUs)



Source: Calculated from [CTS](#)

Yearly SSA imports are also up (by a significant **↑18,7%**, y/y) – with exports up by **↑3,1%** (y/y). The following graph, adding South Africa's share to SSA trade, shows a continuation of the general flow, as Transnet's financial year-end throughput numbers in April (**290 682 TEUs**) are cyclically on the low side:

Figure 17 – South Africa's share in regional containerised throughput (% share)



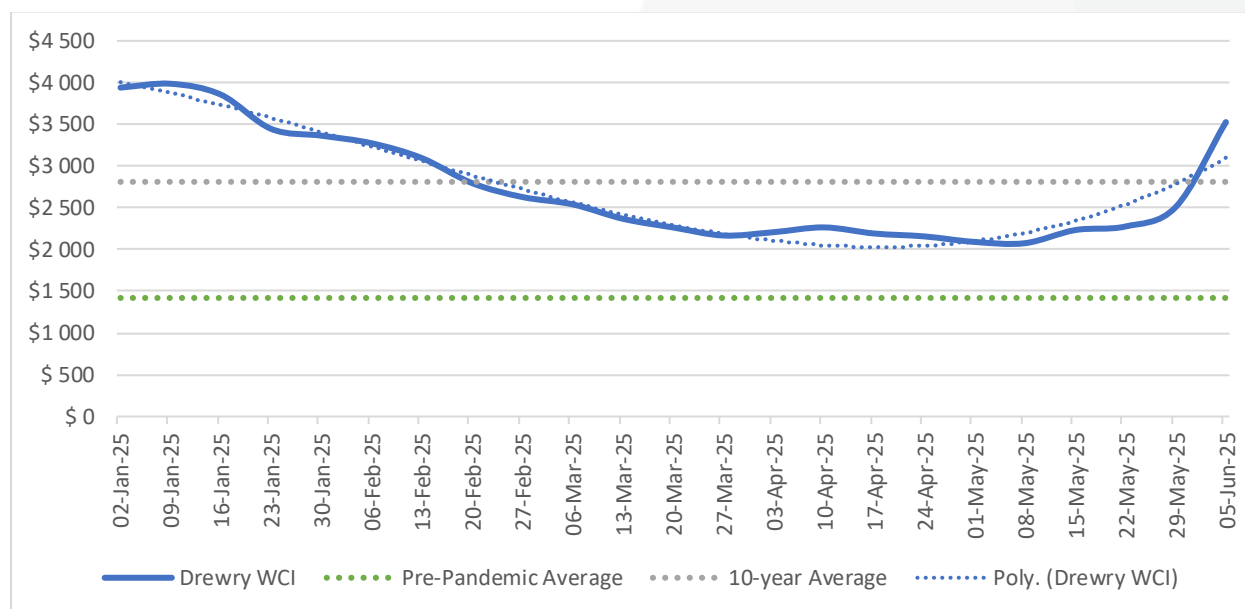
Source: Calculated from [CTS](#)

When measuring these, South Africa accounted for approximately **18%** of SSA imports and **43%** of SSA exports in April, according to TNPA figures. These respective shares are significantly less than the highs of **35%** in February 2022 for imports and **82%** in September 2022 for exports. Fortunately, recent strong weeks (like this week) will significantly increase these figures, as the stabilisation and improved operations will hopefully continue.

ii. Global freight rates and container inventory

Drewry's "World Container Index" surged by the second most ever weekly movement, increasing by **↑41%** (or **\$1 019**) to **\$3 527 per 40-ft container**.¹⁰ The last equivalent surge happened at the turn of the previous year, as rates jumped by nearly **↑60%** between December 2023 and January 2024. Nevertheless, the industry expects these rates to subside quickly, as Asia-US freight rates have peaked and are now declining as excess Transpacific capacity – particularly to the Los Angeles/Long Beach gateway – outpaces demand, curbing carriers' ability to sustain rate hikes amid withdrawn extra loaders, stable equipment availability in Asia, and limited port congestion.¹¹ The following shows the year-to-date movement, as rates have again surpassed the 10-year average.

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



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

Charter rates continued their ascent, as the transpacific charter demand also spiked, as the *Harper Petersen Index* (Harpex) traded around **2 125 points (↑0,5%)** on Friday.¹²

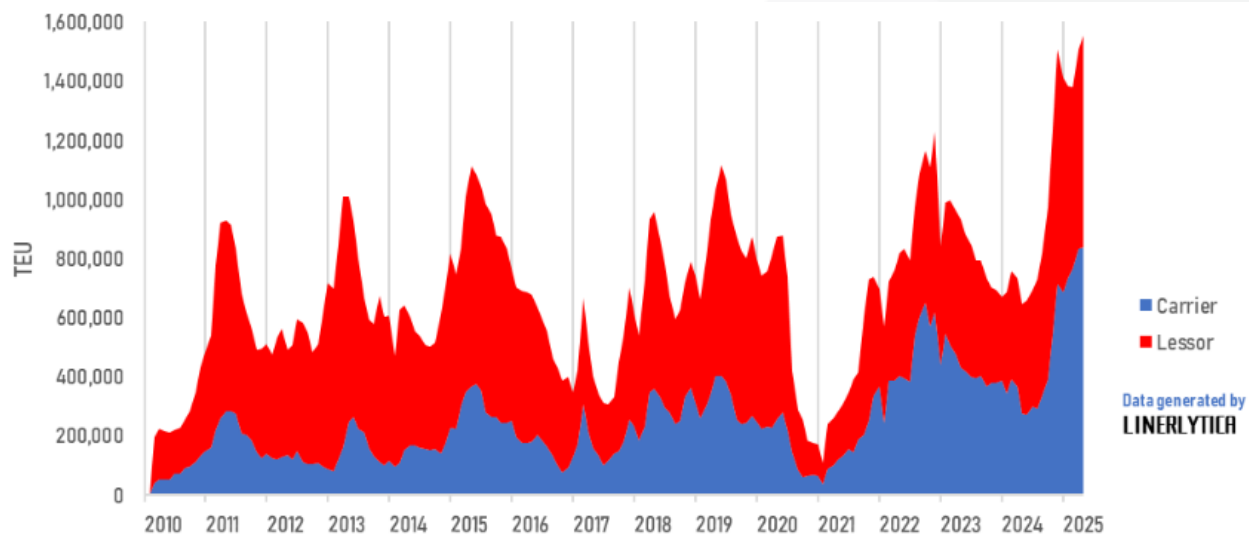
China's new container inventories rose to a record **1,55 million TEU** by end-May, as strong Transpacific demand failed to deplete the ample supply of boxes. With over **520 000 TEU** delivered in May alone and more than **2,3 million TEU** added this year, fears of a container shortage have eased, unlike in 2021, due to proactive ordering by carriers and lessors amid falling equipment prices.

¹⁰ Drewry. 05/06/2025. [World Container Index](https://www.drewry.com/).

¹¹ Linerlytica. 08/06/2025. [Market Pulse – Week 23](https://www.linerlytica.com/).

¹² Harpex. 07/06/2025. [Harper Petersen & Co Charter Rate Index](https://www.harpex.com/).

Figure 19 – Container Inventory (TEU millions)



Source: Linerlytica

b. Global air cargo industry

In the high-frequency metrics from World ACD, global air cargo tonnages rebounded in May with a **↑4%** month-on-month rise, offsetting April's **↓7%** decline. This recovery was driven by renewed transpacific demand following a partial US-China tariff reprieve in mid-May. All regions except Central and South America posted month-on-month growth. May volumes also went up **↑4%** yearly, led by Asia Pacific (**↑7%**). However, average global rates declined **↓4%** (m/m) and **↓3%** (y/y), with notable drops from the Middle East & South Asia (**↓14%**).

Figure 20 – Regional changes in capacity, chargeable weight, and rates (weeks 2 to 5, % change)

Origin Regions

last 2 to 5 weeks



	Capacity ¹			Chargeable weight ¹			Rate ¹		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		+3%	+6%		-4%	+1%		+1%	+6%
Asia Pacific		+3%	+3%		+5%	+7%		+5%	-2%
C. & S. America		-2%	-2%		-6%	+2%		-1%	-3%
Europe		+0%	+2%		-3%	+3%		+1%	+0%
M. East & S. Asia		+5%	+6%		+5%	+1%		+1%	-13%
North America		+1%	-2%		-4%	-1%		-2%	-2%
Worldwide		+2%	+1%		+1%	+4%		+4%	-2%

Source: [World ACD](#)

In week 22 (26 May–1 June), tonnages fell **↓8%** week-on-week due to holidays, but rates rose **↑3%** (w/w) to **\$2,44/kg**. The China–US lane remained volatile, with slightly higher spot rates but softer demand. China–Europe volumes fell WoW but remained **↑13%** higher year-on-year.

ENDS¹³

¹³ACKNOWLEDGEMENT:

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.