

Cargo Movement Update #246¹

Date: 10 August 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)	42 935	48 915	91 850	37 428	42 641	80 069	↑15%
Air Cargo (tons)	4 094	2 116	6 211	4 156	2 194	6 351	↓2%

Monthly Snapshot

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

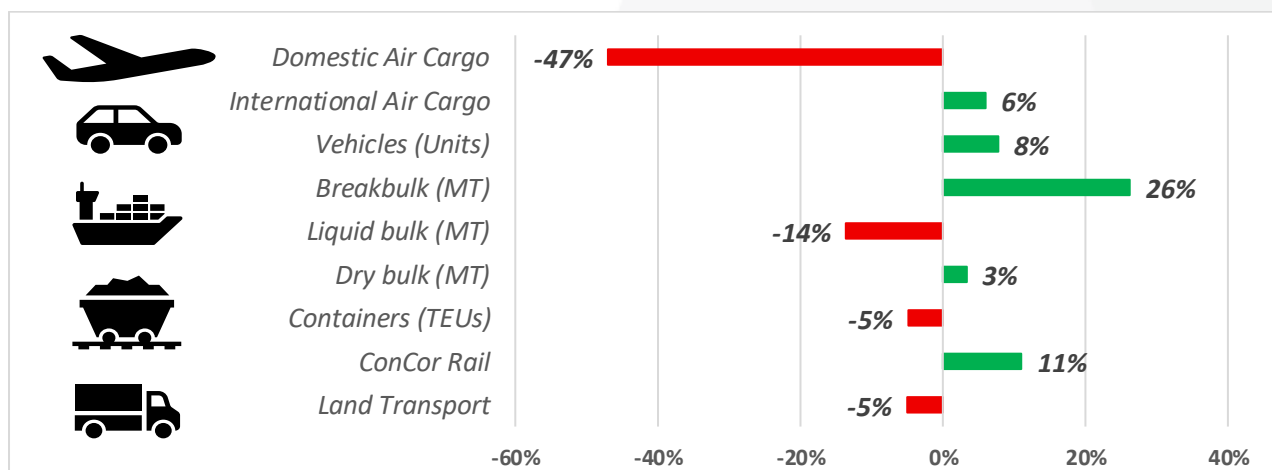
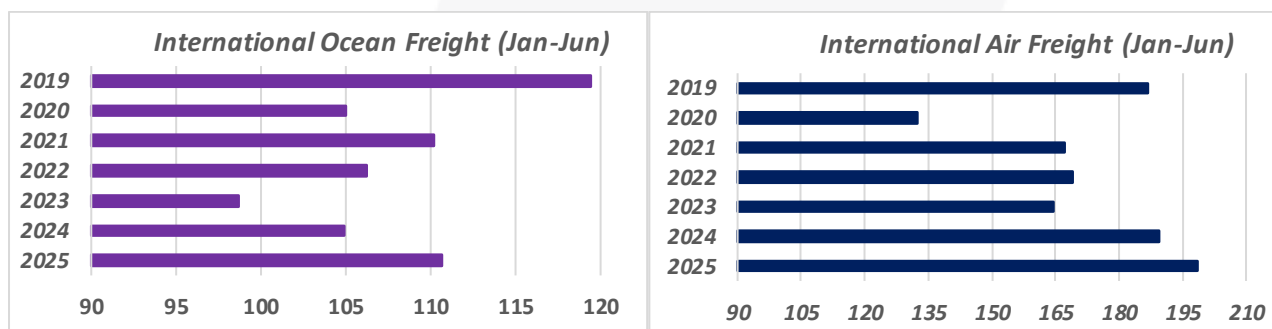


Figure 2 – Year-to-date flows 2019-2025⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~13 121 TEUs was handled per day, with ~12 581 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 2 745 containers, down by ↓12% from last week.
- Cross-border queue: ↓0,4 hrs; transit: ↓0,4 hrs; SA borders: ~10,6 hrs (↓9%); SADC: ~4,4 hrs (↓6%).
- Global TEU throughput in June is down by ↓3,4% (m/m), but up ↑2,6% (y/y). American imports ↑7,3%.
- Global spot rates: down for an 8th straight week (↓3%, or \$75) to \$2 424/40ft; YTD: ↓38% & ↓56% (y/y).
- Global air cargo held steady in July, closing with a ↓2% (w/w) drop but an overall ↑8% (m/m) rebound.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 246th 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: June vs June.

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 **13 121 TEUs** was handled daily, a notable increase from **11 438 TEUs** the previous week. Despite another good week for throughput, some delays were apparent and could be attributed to the fact that inclement weather, vacant berths, and equipment challenges once again characterised port operations.

Vessel ranging, high swells, and adverse weather ensured operational delays in Cape Town, while equipment breakdowns and inclement weather proved to be the main operational constraints in Durban. Vacant berths and strong winds disrupted operational performance at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. The latest reports from TPT suggest that NCT will be facilitating a shift engagement on 13, 15, 18, and 19 August for all four shifts. The latest reports from TFR indicate that the line between Johannesburg and Durban was recommissioned this week, after the latest derailment, which occurred near Thornwood, on the Durban side of the line. Furthermore, the latest reports from Maersk suggest that the fuel surcharge will be adjusted to a base fuel price of **R19,43**, in line with the recent announcement from the central energy fund, with the charge coming into effect from 1 September 2025.

Globally, the WTO has revised its 2025 global merchandise trade growth forecast upward to **↑0,9%**, from a previous **↓0,2%** contraction, though still well below pre-tariff expectations. This improvement stems mainly from US import front-loading ahead of tariff hikes, but growth is expected to slow to **↑1,8%** in 2026. Global container throughput fell **↓3,4%** (m/m) in June after a record May, yet remains **↑2,6%** higher year-on-year. Sub-Saharan Africa's imports surged **↑23,6%** (y/y), with South Africa's regional trade share down from 2022 highs. Transpacific volumes reached record levels in July before tariffs reduced liftings. Freight rates have fallen for eight straight weeks despite robust time-charter prices, reflecting mixed market signals, with carriers offering divergent outlooks amid geopolitical and economic uncertainties. Other developments of note include **(1)** the US rejecting the IMO net-zero framework, and **(2)** the US extending a 90-day pause for reciprocal tariffs on Chinese imports.

In July, international air cargo volumes decreased month-on-month at Johannesburg (**↓2%**) and Durban (**↓3%**), but increased at Cape Town (**↑15%**). Year-on-year, cargo is down at Johannesburg (**↓2%**), and up at Cape Town (**↑9%**) and Durban (**↑15%**) compared to 2024. The year-to-date cargo is up by **↑4%** (y/y). Domestically, July volumes increased drastically month-on-month and year-on-year (except for Cape Town), as Johannesburg is up by **↑52%** (m/m) and **↑14%** (y/y), Cape Town by **↑7%** (m/m – but down by **↓2%**, y/y) and Durban by **↑18%** (m/m) and a substantial **↑109%** (y/y).

Operationally, leases at OR Tambo remain unresolved; however, ACSA has indicated plans to issue open tenders within two months, while a Pretoria High Court ruling has clarified that the Air Service Licensing Council may not impose race-based criteria in licensing decisions, reinforcing statutory compliance and procedural transparency.

Internationally, July shows a rebound in tonnage while rates remain under pressure. Global air cargo volumes held steady through July, closing the month with a **↓2%** weekly drop but an overall **↑8%** month-on-month rebound, lifting year-on-year (y/y) growth to **↑6%**.

Cargo movements along the N4 corridor increased slightly for road transport and increased somewhat for rail transport. Truck volumes through the border post were **1 580 HGVs per day** (**↓0,3%**, w/w). Queue times increased to an average of **5,8 hours** (**↑14%**) at the border, as the average processing time increased by about the same (**↑8%** to **5,5 hours**) per crossing. The rail to Maputo decreased slightly to an average of

eight trains daily (down by **two** from last week). Sugar trains from Eswatini increased somewhat to around **two trains a day**.

Land border crossing times decreased slightly – on average – across the SADC region. Overall, the average queue time decreased by approximately **half an hour** from last week, while transit time decreased by the same magnitude. The median border crossing times at South African borders decreased by **an hour**, averaging **~10,6 hrs (↓9%)** for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased by around **20 minutes**, averaging **~4,4 hrs (↓6%)**. As has been the case over the last few weeks, 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 days from the Zambian side** – down by 18 hours, at least). Other developments of note include **(1)** SADC certificate stamping delays (SARS Johannesburg), **(2)** operational concerns at CONDEP (Beitbridge), **(3)** road closures – N3 market road overpass (Pietermaritzburg), and **(4)** COMESA e-Certificates of origin (Zimbabwe).

In summarising this edition, container throughput remains elevated, supported by improved port performance in recent weeks. For the last 10 weeks, the average weekly throughput has hovered around **91 500 TEUs** – approximately **↑25%** above the average recorded between the preceding period and the start of the year – a very encouraging sign. While container volumes year-to-date were down by **↓4%** in H1 2025, the industry is now on course to claw back the deficit and potentially register positive returns in H2. This progress is especially important given the prevailing volatility in the external environment. In other sectors, theft, equipment breakdowns, and derailments on the rail network remain a concern. Encouragingly, the Johannesburg–Durban mainline was recommissioned this week, restoring a critical freight artery. As we move forward, sustaining these gains will require vigilance, collaboration, and decisive action to ensure resilience across South Africa's freight system. Moreover, the need to continue with reform remains key to revolutionising our logistics network. Unfortunately, uncertainty remains, as the South African Cabinet's second attempt at appointing the board of the Transport Economic Regulator has been widely criticised as flawed – prompting alarm over the credibility of the process – after which the announcement was quietly removed from official platforms. The deletion of the announcement further intensified concerns about transparency and governance in the establishment of this critical regulatory body.⁶ Ultimately, we are moving in the right direction both operationally and regulatory, albeit with several constraints still inhibiting full growth and full reform.

⁶ Paton, C. 12/08/2025. [Alarm over Cabinet's second set of board appointments for SA's new Transport Regulator](#).

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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 4 to 10 August (measured in TEUs)

7-day flow reported (04/08/2025 – 10/08/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 471	38 299	↑19%
New Pier (Pier 1)	1 881	13 167	↑20%
Cape Town Container Terminal	1 951	13 656	↑0,2%
Ngqura Container Terminal	2 153	15 071	↑12%
Port Elizabeth Container Terminal	974	6 816	↑118%
Other	692	4 841	↓27%
Total	13 121	91 850	↑15%

Source: Calculated from TPT, 2025. Updated 10/08/2025.

An increased average of ~**13 121 TEUs (↑15%)** was handled per day for the last week (4 to 10 August, Table 2). The volume was above the projected average of ~**12 581 TEUs (↑4% actual versus projected)**.

For the coming week, a decreased average of ~**12 581 TEUs (↓4%)** is predicted to be handled (11 to 17 August, Table 3).

Despite another good week for throughput, some delays were apparent and could be attributed to the fact that inclement weather, vacant berths, and equipment challenges once again characterised port operations.

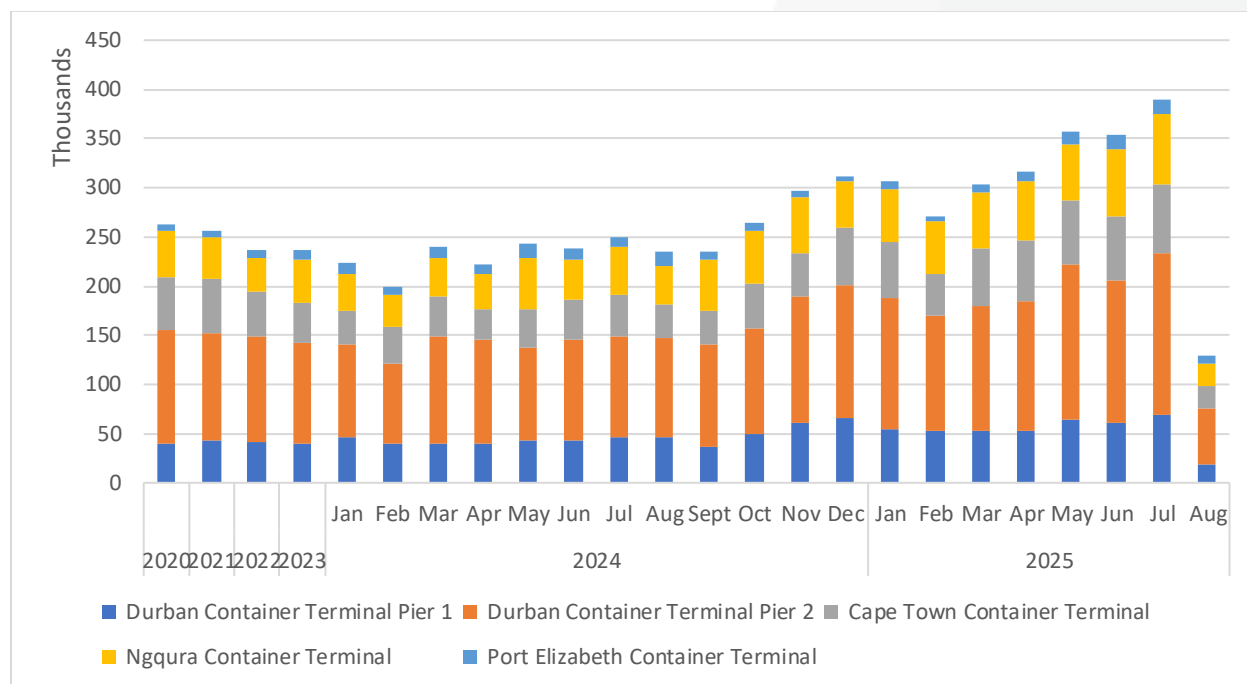
Table 3 – Container Ports – Weekly flow projected for 11 to 17 August (measured in TEUs)

7-day flow projected (11/08/2025 – 17/08/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 351	37 459	↓2%
New Pier (Pier 1)	2 051	14 360	↑9%
Cape Town Container Terminal	1 698	11 887	↓13%
Ngqura Container Terminal	2 088	14 614	↓3%
Port Elizabeth Container Terminal	478	3 347	↓51%
Other	914	6 399	↑32%
Total	12 581	88 066	↓4%

Source: Calculated from TPT, 2025. Updated 10/08/2025.

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.

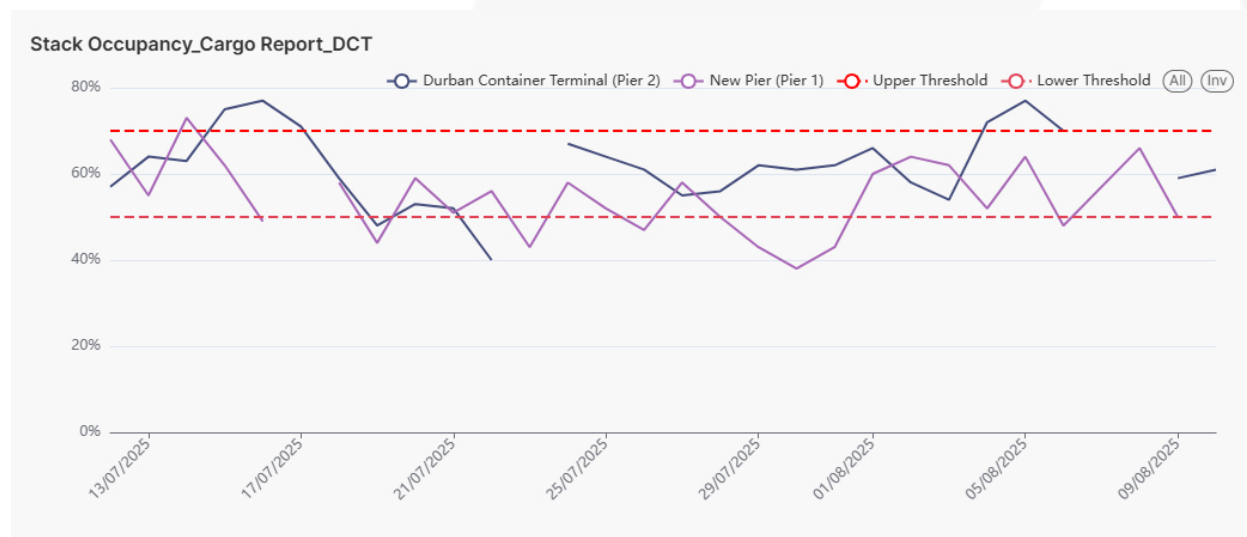
Figure 3 – Monthly flow reported for total container movement (thousands, 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 10/08/2025.

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

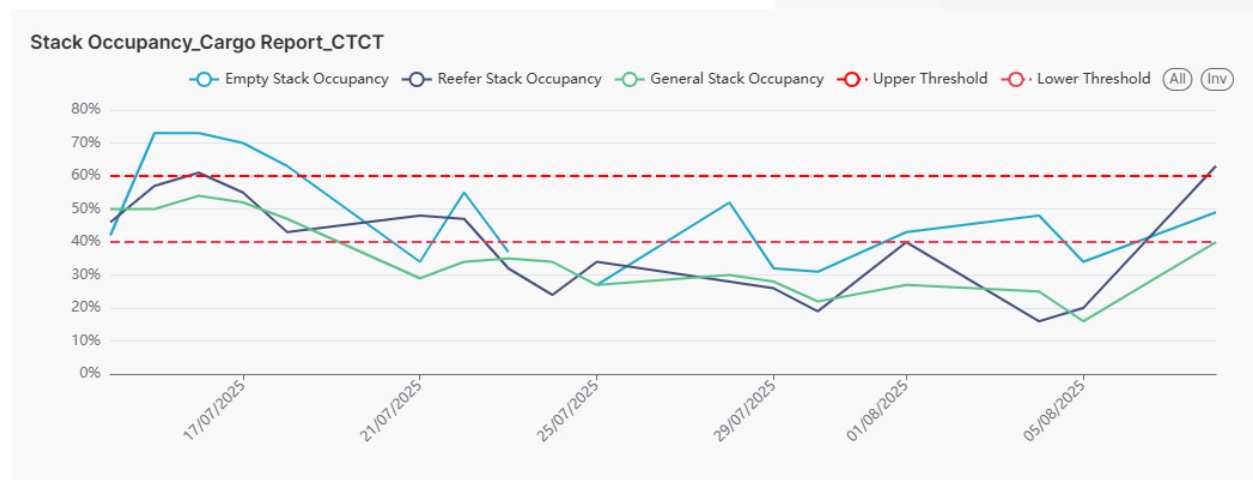
Figure 4 – Stack occupancy in DCT, general-purpose containers (13 July to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 10/08/2025.

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

Figure 5 – Stack occupancy in CTCT, GP, reefer, and empty stack (14 July to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 10/08/2025.

b. Summary of port operations

i. Weather and other delays

- Vessel ranging, high swells, and adverse weather ensured operational delays in Cape Town.
- Equipment breakdowns and inclement weather proved to be the main operational constraints in Durban.
- Vacant berths and strong winds disrupted operational performance at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

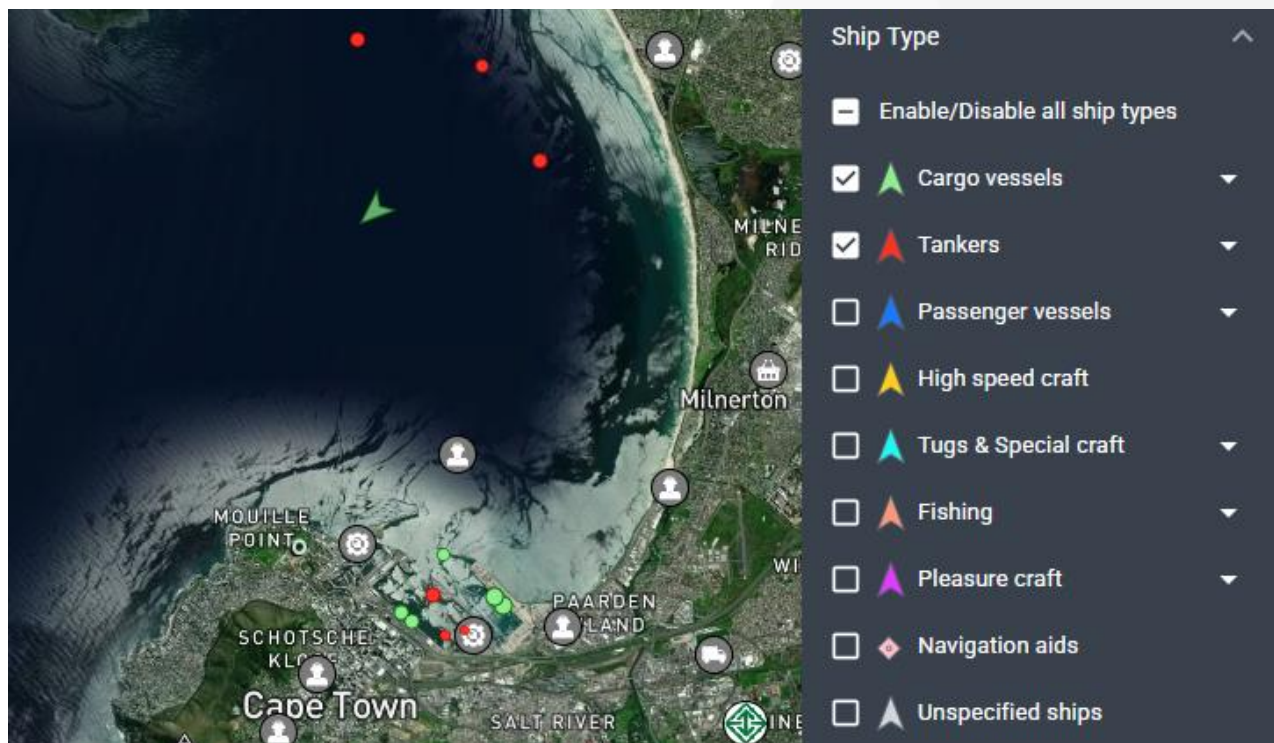
ii. Cape Town

On Thursday, CTCT recorded two vessels at berth and one at anchor, as vessel ranging, high swells, and adverse weather proved to be the primary operational constraint at the port. On the landside, between Monday and Friday, the terminal managed to service at least 4 094 trucks while handling approximately 236 rail units. On the waterside, the terminal executed approximately 4 823 container moves across the quay during the same period. Additionally, this week the terminal operated with between **six and eight STS cranes**, between **19-23 RTGs**, and around **59 hauliers**. Crane LC6 was the most notable crane absentee before the weekend, with the machine expected back in service early next week.

On Thursday, CTMPT recorded one vessel at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 846 tons on the waterside. On the landside, 24 trucks were processed during the same period. Stack occupancy was recorded at 0% for general cargo, 0% for reefers, and 0% for empties. For the most significant part of the week, the terminal operated with three cranes and four straddle carriers.

Between 28 July and 3 August, the FPT terminal handled eight vessels: two multi-cargo, two dry bulk, one container, two break bulk, and one layby vessel. Berth occupancy during this period was recorded at 53%. The terminal planned to handle eight more vessels between 4 and 10 August, with another seven vessels scheduled between 11 and 17 August. 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 10/08/2025 at 14:00.

iii. Durban

On Friday, Pier 1 recorded two vessels on berth, with zero vessels at anchor. Between Monday and Friday, the terminal executed at least 6 073 gate moves and 276 rail moves on the landside. The **average TTT** for the week was **~53 minutes** (↑6%, w/w) and an average **staging time** of **~30 minutes** (↓17%). Additionally, the terminal moved over 8 000 TEUs across the quay on the waterside during the same period. The terminal had between **four and six STS cranes** and **15-16 RTGs** available for the most significant part of the week.

Pier 2 had four vessels on berth and none at anchorage on Friday, as equipment breakdowns and adverse weather prevented optimal operational performance this week. The terminal operated with **10-12 gangs** and moved over **18 900** containers across the quay between Monday and Friday on the waterside. Approximately **13 369** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~76 minutes** (↓13%, w/w) and an average **staging time** of also **~72 minutes** (↓17%). Approximately 1 330 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **64** and **74** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **64%** during this period.

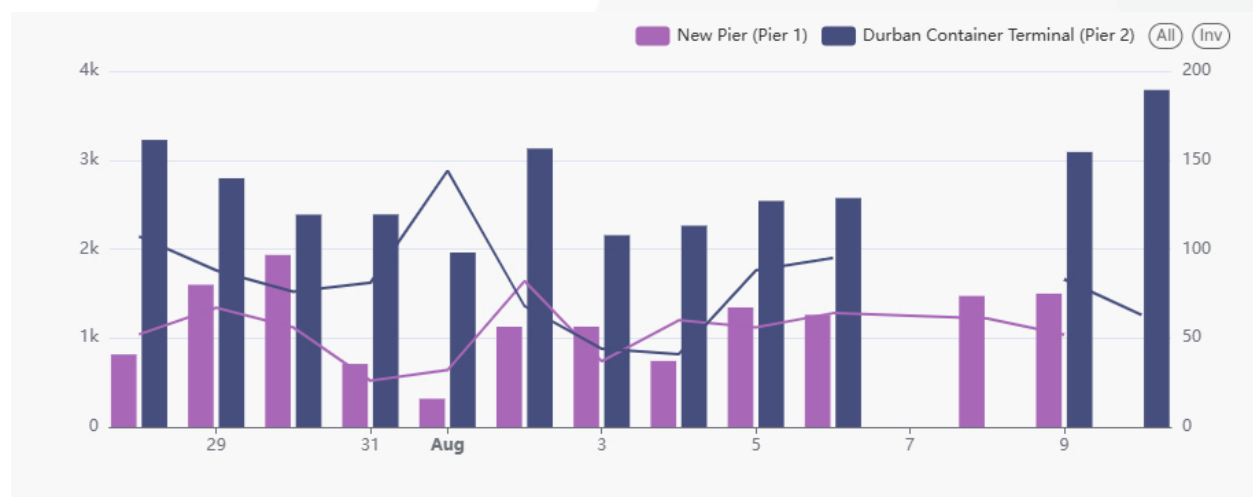
Durban's MPT terminal recorded two vessels at berth on Thursday and none at outer anchorage. Stack occupancy for containers was recorded at 46% and the reefer stack at 89%, with the breakbulk stack at 15%. In the preceding 24 hours, 458 containers were handled on the waterside. On the landside, 437 container trucks were serviced at a TTT of ~40 minutes. Additionally, 10 breakbulk trucks, containing 240 tons, were serviced. During this period, two cranes, nine reach stackers, seven forklifts, and 20 ERFs were in operation. The third crane returned to operations on Friday, while the latest reports from TPT maintain that the fourth crane is only scheduled to return to service around 21 December.

Between Wednesday and Thursday, the Maydon Wharf MPT recorded one vessel at berth and one at anchorage. No volumes were handled on either the waterside or landside due to rainy weather and the weather-sensitive nature of the cargo being handled. During the same period, the agri-bulk facility had one vessel at berth and zero vessels at anchor. The terminal managed to handle 8 531 tons on the waterside, with no trucks being serviced on the landside.

On Thursday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with zero at anchorage. In the preceding 24 hours, the terminal handled 445 road units and 447 units on rail on the landside, while 1 128 units were handled on the waterside. Overall stack occupancy was 45%, 10% at Q+R, and 70% at G-berth. During this period, the terminal had 110 high-and-heavy (abnormal loads) on hand and managed to handle eight.

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.

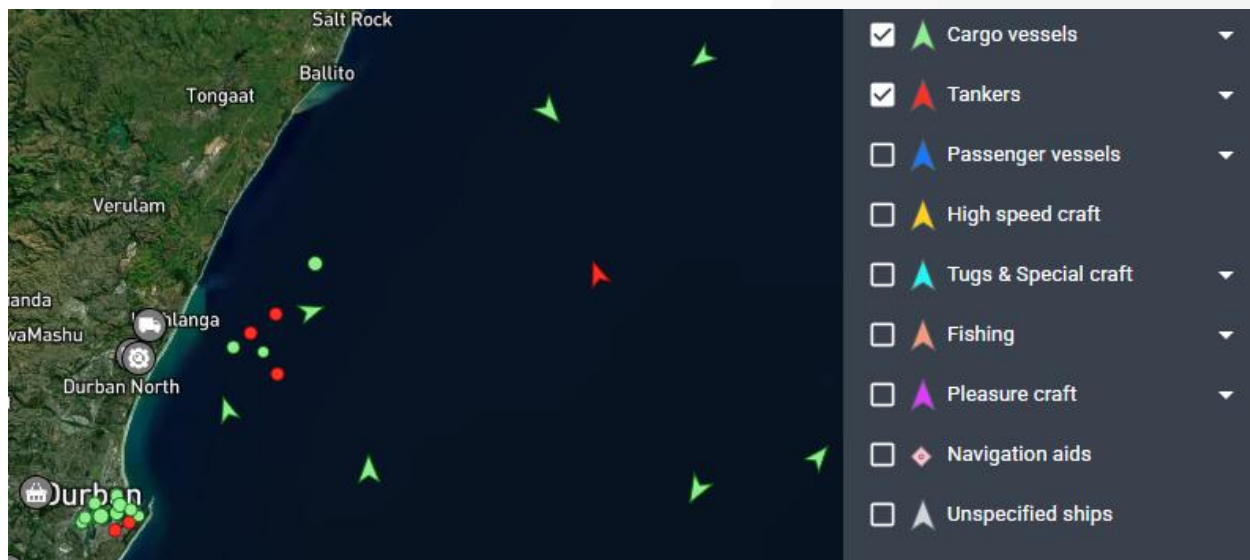
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 10/08/2025.

The queue of container vessels waiting outside Durban has slightly decreased from last week. On Monday evening (11 August), **one** container vessel was waiting outside the anchorage at Point terminal. The queue of dry (**two**), liquid (**five**), and breakbulk (**zero**) vessels has slightly decreased from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 10/08/2025 at 14:00.

iv. Richards Bay

On Thursday, the Port of Richards Bay had four vessels at anchor and ten on the berth, translating to three vessels at DBT, three at MPT, two at RBCT, and two at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter were deployed to support marine resources towards the end of the week. The pilot boat returned to operations at the start of the week as anticipated, but briefly went out of commission once more as the week progressed. The craft did, however, return towards the end of the week once more. No operational delays were reported by TNPA this week.

The daily average coal throughput for the week decreased slightly to around **125 000 tons** (↓5%, w/w). An average of **20 trains** was serviced on the landside (up by **one** from last week), slightly below the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded three vessels on berth and none 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 most significant part of the week, the Ports of PE and Coega shared a pilot boat due to some waterside equipment challenges. Stack occupancy figures were recorded at 34% for reefers, 57% for reefer ground slots, and 43% for the general stack. Despite experiencing adverse weather, the terminal handled approximately 3 791 TEUs and 47 reefers on the waterside. Approximately 629 trucks were processed on the landside at a TTT of ~40 minutes. For the most significant part of the week, the terminal had seven STS cranes, between 24-25 RTGs, and between 49-51 hauliers in service.

The latest reports from TPT suggest that NCT will be facilitating a shift engagement on 13, 15, 18, and 19 August for all four shifts. These engagements will impact operations but will be limited to one hour. It is important to note that the gate will be closed 30 minutes before the engagement to allow the trucks already inside the terminal to be serviced and gated out.

On Thursday, 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, 299 trucks were processed at a TTT of ~41 minutes on the landside, while 1 559 TEUs and 13 reefers were

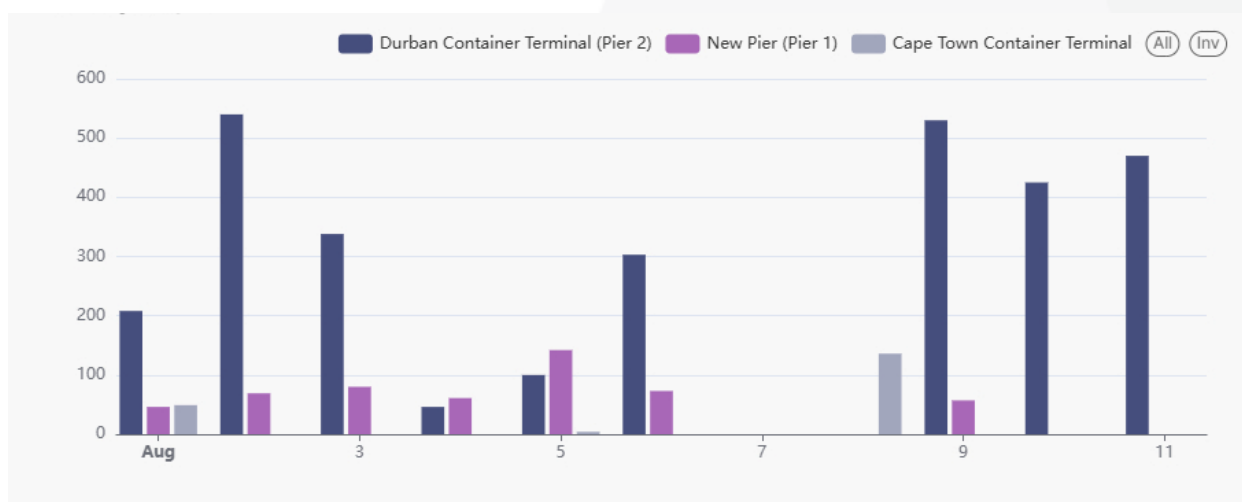
handled across the quay on the waterside. Stack occupancy was recorded at 63% for the general stack, 47% for reefers, and 70% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and nine straddles in service.

On Monday (4 August), the Ro-Ro terminal had zero vessels on berth and zero at outer anchorage. During the preceding 24 hours, the terminal handled around 1 851 units on the waterside, resulting in a stack occupancy of 38%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that the line between Johannesburg and Durban was recommissioned this week, after the latest derailment, which occurred near Thornwood, on the Durban side of the line. Additionally, towards the end of the week, DCT Pier 2 had 712 ConCor units on hand with a dwell time of 144 hours and 346 over-border units with a dwell time of 52 days.

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



Source: Calculated using data from Transnet, 2024. Updated 10/08/2025.

In the last week (11 to 17 August), rail cargo on the ConCor line out of Durban was reported at **2 745** containers, down by a significant **↓12%** from the previous week's **3 134** containers.

vii. Maersk Fuel Surcharge

The latest reports from Maersk suggest that the fuel surcharge will be adjusted to a base fuel price of **R19,43**, in line with the recent announcement from the central energy fund, with the charge coming into effect from 1 September 2025.

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 (4 to 10 August).⁷ For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in August 2024 averaged **~887 000 kg**.

⁷ Note: We have updated the reporting period to coincide with the latest Monday to Sunday cycle (7 to 13 July)..

Table 4 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	584 928	4 094 494	↓1%
Volume outbound	302 287	2 116 007	↓4%
Total	887 214	6 210 501	↓2%

Courtesy of ACOC. Updated: 10/08/2025.

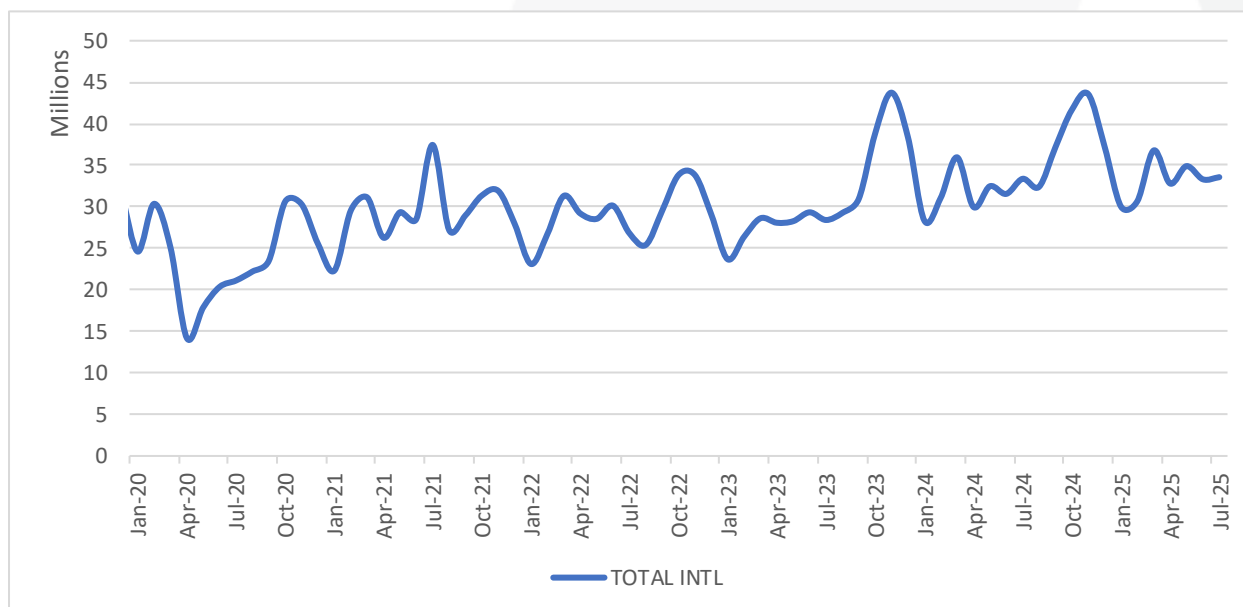
In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~585 000 kg** inbound (↓1%, w/w) and **~302 000 kg** outbound (↓4%). The current levels indicate that cargo is trending at approximately **↑3% (y/y)** above the same level as last year, and about **↑5% (y/y)** above the comparative levels of pre-pandemic 2019.

For the full month of July:

- Johannesburg decreased by **↓2% (m/m)** versus June and is down by **↓2% (y/y)** versus 2024.
- Cape Town increased by **↑15% (m/m)** and by **↑9% (y/y)** versus 2024.
- Durban decreased by **↓3% (m/m)**, but increased by **↑15% (y/y)** compared to 2024.
- Despite the mixed returns, the year-to-date cargo is still up by **↑4% (y/y)** versus 2024.

The following figure shows the international air cargo flows to and from OR Tambo since the start of 2020:

Figure 10 – International cargo for All Airports – volumes per month (kg millions)



Calculated from ACOC. Updated: 10/08/2025.

b. Air cargo operations

Leases at OR Tambo remain unresolved, with no further updates received from ACSA to date. However, the airport authority has now indicated that it intends to issue open tenders for all cargo warehouse facilities within the next two months, which may begin to formalise the current ad hoc arrangements.

Elsewhere, the Pretoria High Court has ruled that the Air Service Licensing Council (ASLC) cannot lawfully impose Broad-Based Black Economic Empowerment (B-BBEE) or other race-based criteria when issuing

domestic air-service licences, mandating instead that applications be assessed solely against statutory requirements such as safety, residency, registration, and control under the Air Services Licensing Act 115 of 1990. The court also invalidated ASLC's prohibition on electronic devices and recordings during hearings, reinforcing the requirement for open and transparent, publicly held licensing processes.⁸

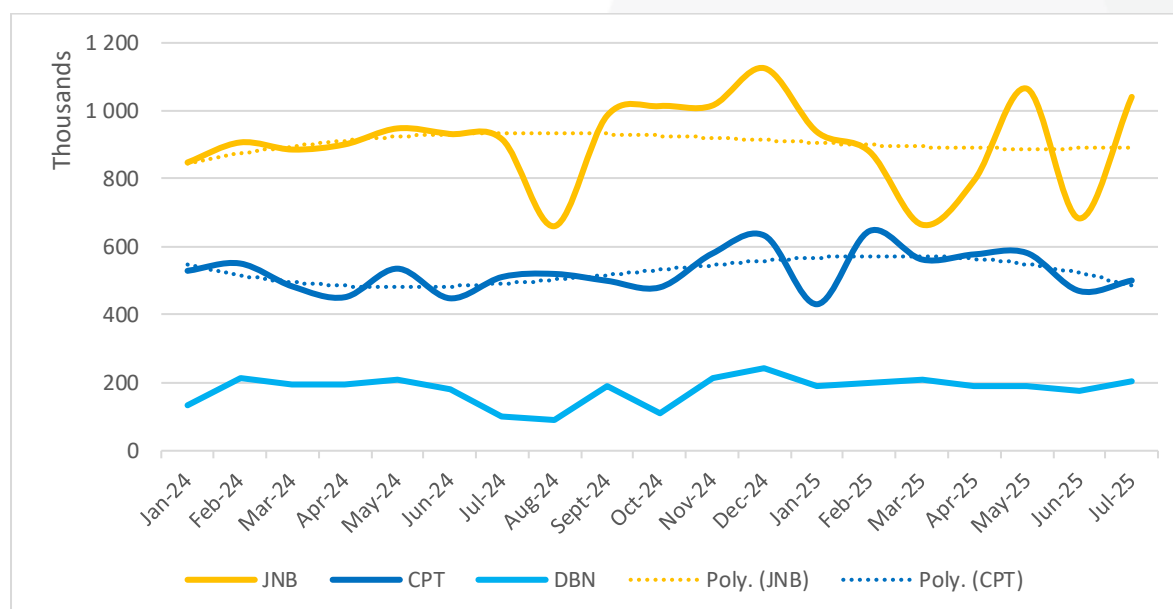
c. Domestic air cargo

For the full month of July, domestic volumes handled at our three main terminals increased across the board:

- Johannesburg increased by **↑52%** (m/m) versus June and by **↑14%** (y/y) versus 2024.
- Cape Town increased by **↑7%** (m/m), but is down by **↓2%** (y/y) versus 2024.
- Durban increased by **↑18%** (m/m) and by a substantial **↑109%** (y/y) versus 2024.

The following figure shows the movement since the start of last year, with the drop-off for June noticeable:

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 10/08/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (4 to 10 August), cargo movements along the N4 corridor remained relatively stable compared to last week. The following notes summarise the recent developments:

- Truck volumes through the border post were **1 580 HGVs per day** (↓0,3%, w/w).
- Queue times increased to an average of **5,8 hours** (↑14%) at the border, as the average processing time increased by about the same (↑8% to **5,5 hours**) per crossing.
- The rail to Maputo decreased slightly to an average of **eight trains daily** (down by **two** from last week).

⁸ Molloy, K. 10/08/2025. [Court blocks BEE for air licences.](#)

- Sugar trains from Eswatini increased somewhat to around **two trains a day**.

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

Table 5 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo
Design Capacity	1 500	1 500	1 200	200	n/a	50	50	2 000	20	10	6	4
Average	1 580	1 568	1 117	227	34	99	63	317	9	8	2	2
% (w/w)	0%	12%	-3%	-11%	-2%	10%	21%	8%	-17%	-12%	-73%	35%
% of design capacity	106%	92%	96%	126%	n/a	179%	99%	15%	50%	94%	43%	36%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 10/08/2025.

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

Figure 12 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 10/08/2025 at 14:00.

b. SADC cross-border and road freight update

Notable trends this week in cross-border road freight within South Africa and the broader SADC region:

- Overall, the average queue time decreased by approximately **half an hour** from last week, while transit time decreased by the same magnitude.
- The median border crossing times at South African borders decreased by **an hour**, averaging **~10,6 hrs (↓9%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased by around **20 minutes**, averaging **~4,4 hrs (↓6%)**.

1. SADC certificate stamping delays (SARS Johannesburg):

- a. SARS' Johannesburg branch has extended its turnaround time for stamping SADC certificates to three working days, aligning with other BFE branches and Customs SOPs.
- b. This replaces the previous 24-hour service at the Alberton branch, prompting complaints from transporters.

2. Operational concerns at CONDEP (Beitbridge):

- a. Transporters are raising concerns about limited staffing (only two officers reportedly on duty) and the requirement for escorts despite 12 inspection bays at CONDEP.

- b. FESARTA has engaged ZIMRA to explore a permanent solution and suggested the use of an official stamp to indicate inspection clearance, aiming to reduce driver harassment.

3. Road closures – N3 market road overpass (Pietermaritzburg):

- a. SANRAL closed sections of the N3 from Saturday, 2 August (18:00) to Monday, 4 August, to demolish the Market Road Overpass.
- b. Transport disruptions were expected over the period.

4. COMESA e-Certificates of Origin (Zimbabwe):

- a. ZIMRA has begun the electronic exchange of COMESA Certificates of Origin. Exporters to Zimbabwe under the COMESA trade agreement must now register with ZRA.
- b. Benefits include faster processing, enhanced border productivity, cost savings, and real-time verification.

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	520	24,6	6,3	25,0	15 600	3 640
Beitbridge	Zimbabwe-SA	466	15,4	2,3	15,2	13 980	3 262
Groblersbrug	SA-Botswana	213	17,3	1,4	17,2	6 390	1 491
Martin's Drift	Botswana-SA	192	2,5	0,3	2,3	5 760	1 344
Kopfontein	SA-Botswana	199	13,9	1,5	13,5	5 970	1 393
Tlokweng	Botswana-SA	19	0,6	0,2	0,4	570	133
Vioolsdrift	SA-Namibia	30	4,2	1,2	4,1	900	210
Noordoewer	Namibia-SA	20	2,0	0,4	2,0	600	140
Nakop	SA-Namibia	30	4,2	0,5	4,1	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,4	1,2	600	140
Skilpadshek	SA-Botswana	249	5,0	2,0	4,6	7 470	1 743
Pioneer Gate	Botswana-SA	56	0,0	0,0	0,0	1 680	392
Lebombo	SA-Mozambique	1 585	5,8	1,2	5,5	47 550	11 095
Ressano Garcia	Mozambique-SA	1 543	1,9	0,3	1,5	46 290	10 801
Sum/Average		5 142	7,0	1,3	6,9	154 260	35 994

Source: TLC, FESARTA, & Crickmay, week ending 03/08/2025.

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	13,4	5,4	13,2	9 600	2 240
Central Corridor	798	1,1	0,2	1,1	23 940	5 586

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.

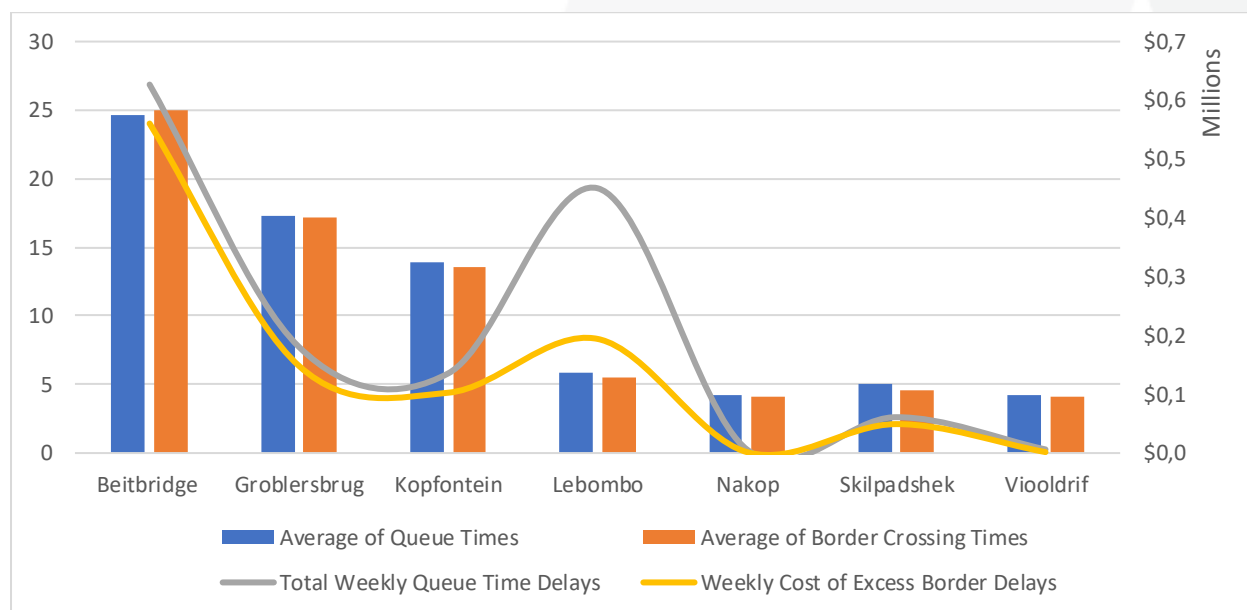
¹⁰ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Dar Es Salaam Corridor	1 819	9,7	1,0	9,7	54 570	12 733
Maputo Corridor	3 128	3,9	0,8	3,5	93 840	21 896
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 566	10,3	1,5	10,3	106 980	24 962
Northern Corridor	2 817	1,1	0,2	1,0	92 520	21 588
Trans Caprivi Corridor	335	2,2	0,7	1,9	10 050	2 345
Trans Cunene Corridor	100	2,9	0,6	2,8	3 000	700
Trans Kalahari Corridor	116	10,9	1,3	10,5	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	13 226	5,1	0,9	5,0	404 790	94 451

Source: TLC, FESARTA, & Crickmay, week ending 03/08/2025.

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

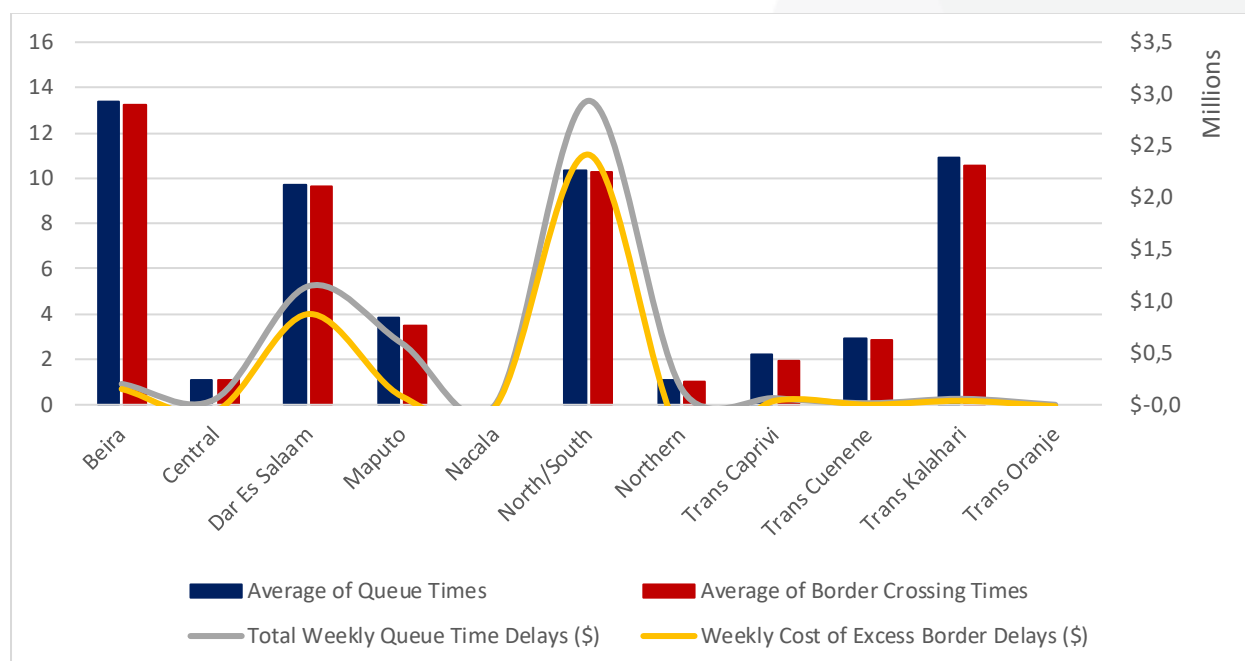
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 03/08/2025.

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 03/08/2025.

In summary, cross-border queue time averaged **~5,1 hours** (down by **~0,4 hours** from the previous week's **~5,5 hours**), indirectly costing the transport industry an estimated **\$5,2 million (R95 million)**. Furthermore, the week's average cross-border transit times also hovered around **~5,0 hours** (down by **~0,4 hours** from the **~5,4 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$3,2 million (R58 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$9,9 million (R152 million)**, down by **~R23 million** or **↓13%** from **~R175 million** in the previous report).

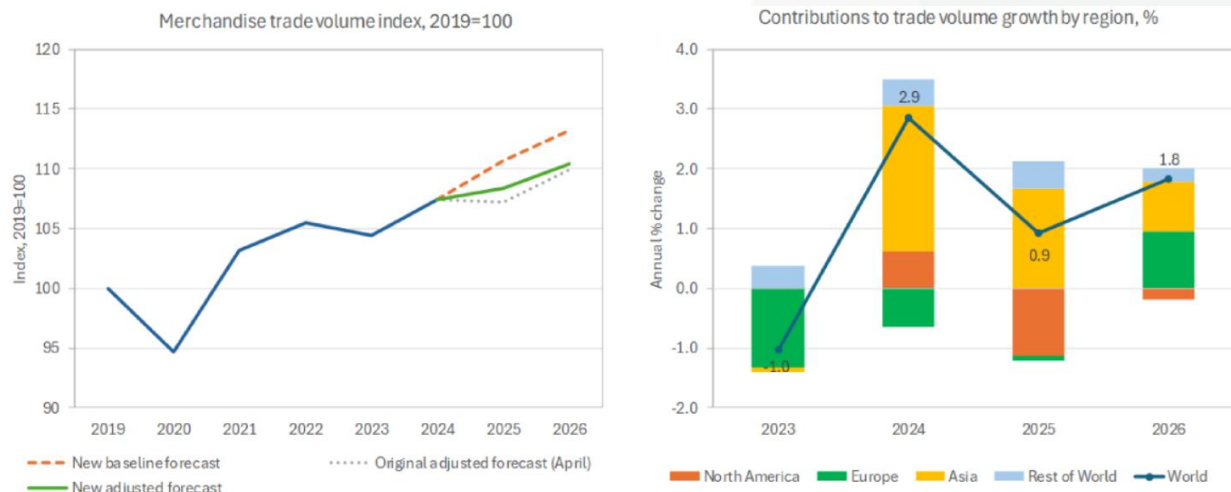
4. International Update

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

a. Global economy

The WTO now projects global merchandise trade will grow by **↑0,9%** in 2025, an upward revision from the **↓0,2%** contraction forecast in April, though still well below the pre-tariff estimate of **↑2,7%** (and below the IMF's global growth forecast of **↑3,0%**). The improvement is primarily driven by the front-loading of US imports ahead of scheduled tariff increases, boosting short-term volumes. However, the organisation cautions that elevated tariffs will significantly temper trade in 2026, reducing expected growth from **↑2,5%** to **↑1,8%**. Structural concerns remain, with continued trade policy uncertainty, shifting supply chains, and geopolitical tensions likely to weigh on the medium-term outlook.

Figure 15 – World merchandise trade volume growth, 2019-2026 (index, 2019 = 100 & annual % change)



Source: [WTO](http://www.wto.org)

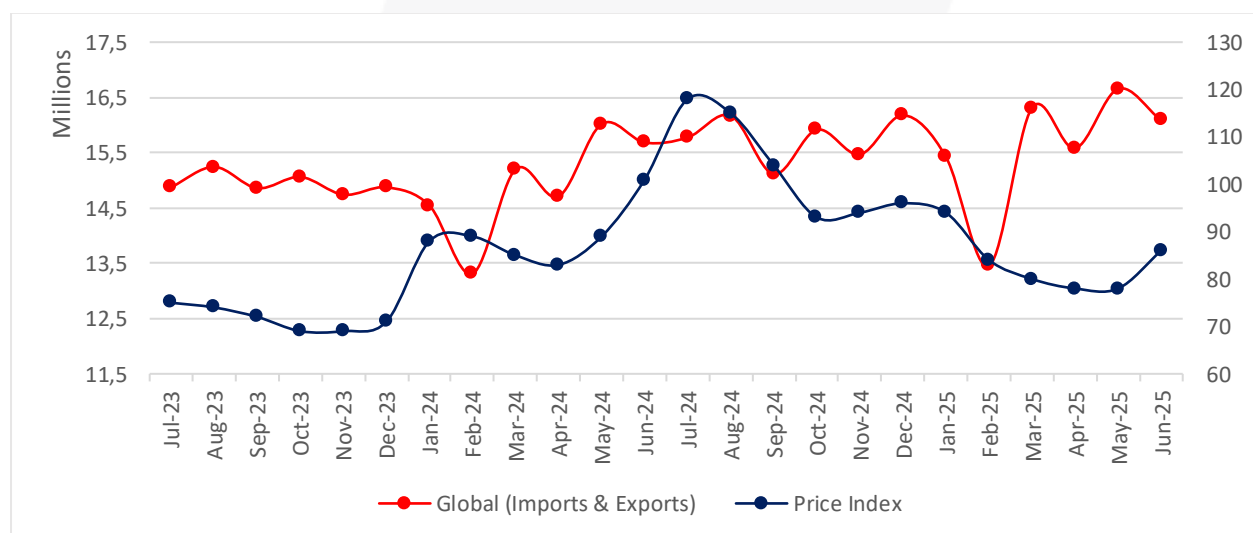
b. Global shipping industry

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

The latest container throughput figures for June from *Container Trade Statistics* (CTS) show that container volume slightly receded after the record throughput in May. June is down by **↓3,4%** monthly but still up by **↑2,6%** (y/y) annually. Most trade lanes experienced decreases in June, with South and Central American exports dropping the most at **↓11,7%**. Interestingly, as reported last week and throughout the last few months, North American imports (led by the US) increased by **↑7,3%** (m/m) – following on from the **↑11,4%** (m/m) increase in May, as the evidence of “front-loading” solidifies.

The global price index (dry and reefer combined) increased in June by **↑10,3%** monthly – but remains down by **↓15%** yearly. However, if the lead indicators for spot prices (as reported weekly, and below) are anything to go by, we can expect moderations in the CTS price index next month. Collectively, the following figure illustrates the global container throughput and price index in the last two years:

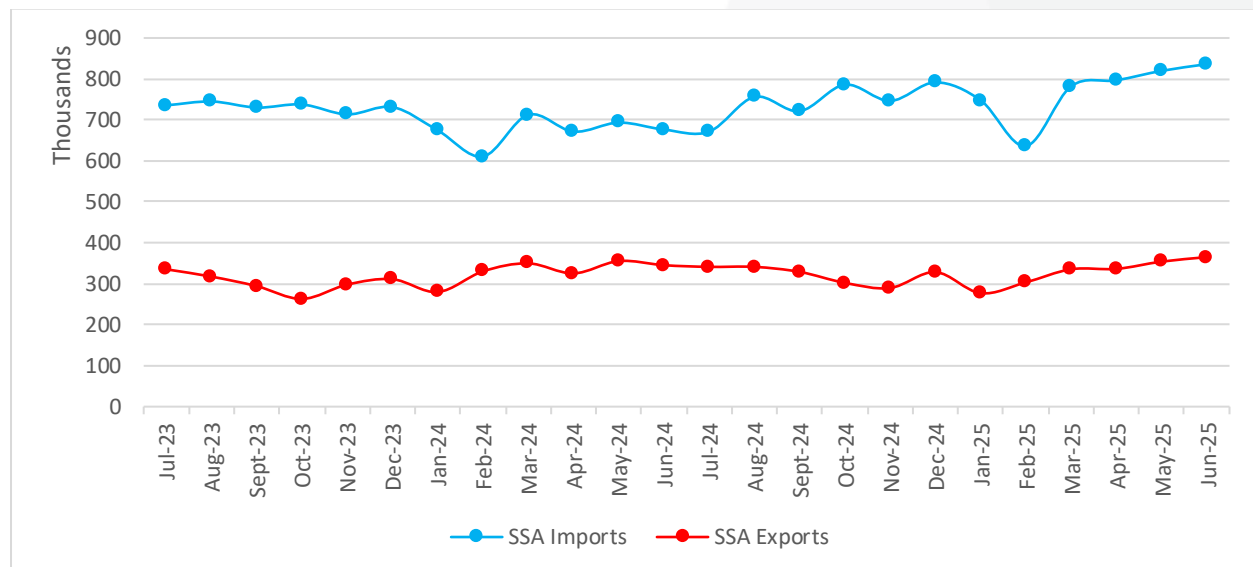
Figure 16 – Global Containerised Throughput (TEUs) and price index



Source: Calculated from [CTS](http://www.cts.org)

Container throughput in June reached **16,1 million TEUs** – some **570 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 **↑3,1%** (m/m) increase in containers exported:

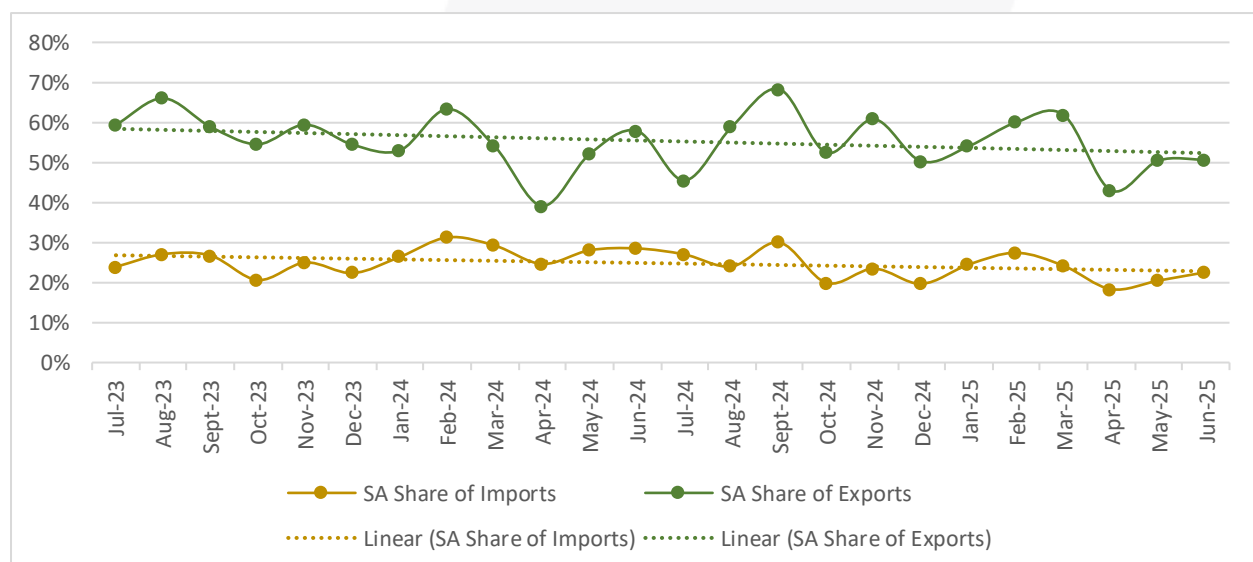
Figure 17 – Sub-Saharan Africa Containerised Throughput (TEUs)



Source: Calculated from [CTS](#)

Yearly SSA imports are also up (by a significant **↑23,6%**, y/y) – with exports up by **↑5,7%** (y/y). The following graph, adding South Africa's share to SSA trade, shows a continuation of the general flow, as Transnet's numbers in June (**373 644 TEUs**) are cyclically on the low side (**↓4,8%**, y/y):

Figure 18 – South Africa's share in regional containerised throughput (% share)



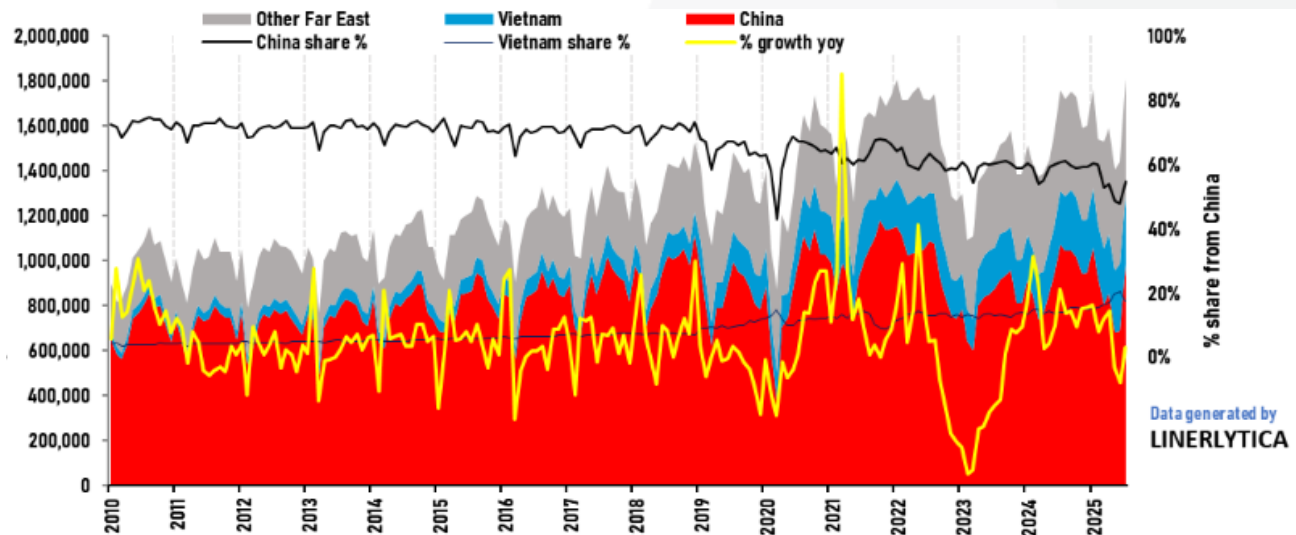
Source: Calculated from [CTS](#)

When measuring these, South Africa accounted for approximately **23%** of SSA imports and **51%** of SSA exports in June, 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 gains have stemmed the tide, and with very good weeks lately, we are expecting better numbers for July and August.

i. Global container sector summary

Transpacific cargo volumes rebounded sharply in July, with total Far East-US container arrivals reaching **1,81m TEU**, surpassing the previous record of **1,805m TEU** in January 2022. China's share of the total volumes recovered to **55%**, up from **48%** in the last two months. Although Vietnam's share slipped from the peak of **20%** last month to **17%**, total volumes from Vietnam still reached a record high of **310 500 TEU**. The rally comes as higher US import tariffs took effect on 7 August 2025, with Transpacific liftings already dropping in the last two weeks, while freight rates to the US West Coast have slipped by more than **↓60%** since 1 June.

Figure 19 – Monthly Far East-US volumes in TEU



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

Elsewhere, port congestion has decreased slightly this week and is trending around **2,81 million TEU (↓8%, w/w)**, accounting for **8,6% of the current fleet**.¹¹ Finally, Maersk reported declining 2Q EBIT margins at **↑2,7%** compared to **↑8,3%** in 1Q, with network costs rising by **↑10%** despite the purported cost savings from the Gemini cooperation. Maersk has continued to slash freight rates to bolster volumes as average revenue dropped by **↓7%** in the quarter.

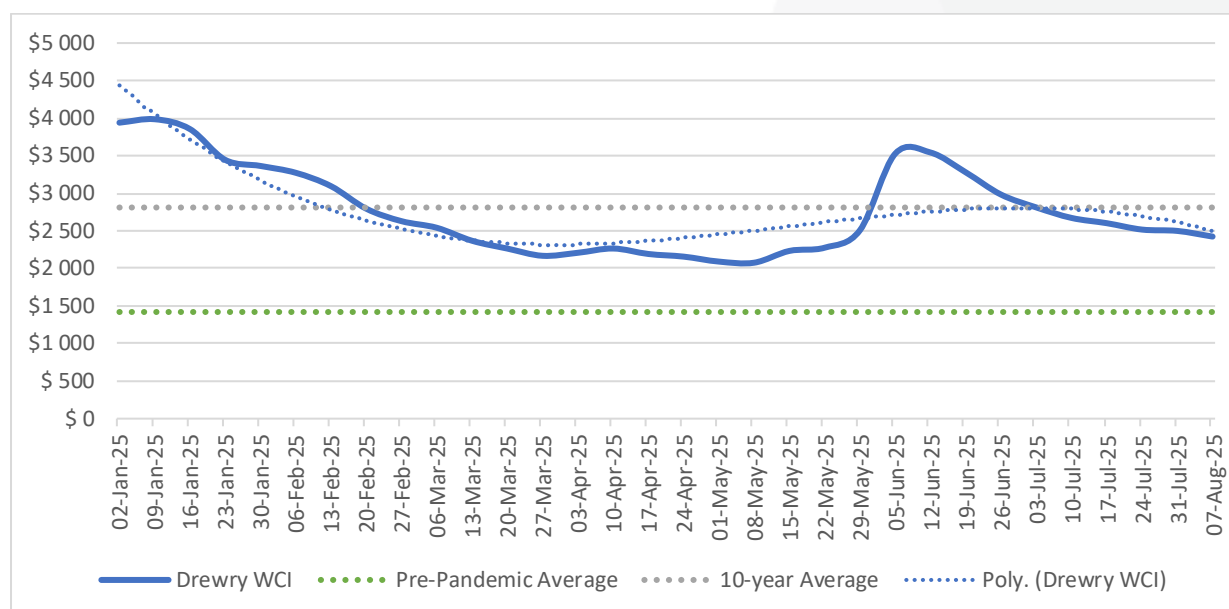
ii. Global freight rates

Global spot rates declined for an 8th consecutive week, as Drewry's "World Container Index" is down by (**↓3%, or \$75**) to **\$2 424 per 40-ft container**.¹² Compared to the beginning of the year, rates have already decreased by **↓38%** and by **↓56%** compared to the same period last year.

¹¹ Linerlytica. 11/08/2025. [Market Pulse – Week 32](https://www.linerlytica.com).

¹² Drewry. 08/08/2025. [World Container Index](https://www.drewry.com).

Figure 20 – World Container Freight Index (\$ per 40ft) & Harper Petersen Charter Index



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

Meanwhile, the *Harper Petersen Index* (Harpex) remained stable and traded around **2 184 points** on Friday. Overall, the market is displaying contradictory signals: time-charter rates remain exceptionally robust – peaking at levels not seen since the COVID era – while spot rates have been declining for nine consecutive weeks. At the same time, carriers are offering conflicting outlooks: Maersk has upgraded its 2025 EBITDA guidance amid resilient demand, whereas ONE has trimmed its forecast by **\$400 million**, citing geopolitical and economic headwinds.¹³

iii. Further developments of note

Apart from the overview provided above, there were some additional noteworthy developments this week:

1. US rejects IMO net-zero framework:

- The United States, through a joint statement by key cabinet officials including Secretary of State Marco Rubio, formally rejected the International Maritime Organisation’s proposed Net-Zero Framework – calling it a “global carbon tax on Americans” and pledging to rally opposition ahead of a decisive October vote.¹⁴
- The framework, initially agreed in principle in April by 63 member states, imposes fuel standards and levies on ships failing to meet GHG intensity targets; the US argues it unfairly benefits China and penalises American-led fuels like LNG and biofuels, warning it may retaliate if the measure is adopted.

¹³ Chambers, S. 11/08/2025. [Container market sends mixed signals as charter rates hold firm, spot rates slide.](#)

¹⁴ Chambers, S 13/08/2025. [US rejects IMO net-zero framework.](#)

2. US extends 90-day pause for reciprocal tariffs on Chinese imports:

- The US extended the 90-day pause for reciprocal tariffs on Chinese imports until 10 November. Furthermore, China announced a similar pause to its threat to increase the current 10% tariff on US imports.¹⁵

c. Global air cargo industry

In the high-frequency metrics from World ACD, global air cargo volumes held steady through July, closing the month with a **↓2%** weekly drop but an overall **↑8%** month-on-month rebound, lifting year-on-year (y/y) growth to **↑6%**. This expansion closely matched capacity growth (**↑5%**), keeping rates under pressure.

Figure 21 – Region to region: capacity, chargeable weight, and rates (last two to five weeks, % change)

Origin Regions last 2 to 5 weeks			Capacity ¹			Chargeable weight ¹			Rate ¹		
			Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa			-2%	+6%		-3%	-0%		-1%	+4%	
Asia Pacific			+1%	+5%		-1%	+8%		+1%	-3%	
C. & S. America			+2%	+1%		-1%	+5%		+1%	-2%	
Europe			-0%	+5%		+3%	+3%		-1%	+4%	
M. East & S. Asia			-1%	+2%		-1%	+1%		+0%	-12%	
North America			+0%	+11%		-2%	+2%		+2%	+0%	
Worldwide			-0%	+5%		-0%	+5%		+0%	-2%	

Source: [World ACD](#)

Globally, average pricing slipped **↓2%** (y/y), with declines from Asia Pacific (**↓4%**) and MESA (**↓11%**), while Europe (**↑5%**) and Africa (**↑6%**) saw rate gains. Africa's tonnage remained stable, with pricing resilience contrasting with global softness. On a 2w/2w basis, overall volumes were flat, with most regions down slightly. The outlook hinges on August's tariff adjustments, which could either sustain the momentum from July's recovery or dampen flows if trade slows.

In other air cargo news, the sector is at a crossroads after six months of unusual demand shifts – notably from the US, which accounted for a higher share of overall import value than is typical. According to TDS data, the split between air and container import value is roughly 40:60, with air's share ranging between 37% and 44%. But TDS data found that for the first six months of 2025, air import value to the US ranged between 46% and 56%. The change in tariffs will undoubtedly influence the split into the second half of the year.¹⁶

ENDS¹⁷

¹⁵ Goldstone, C. 12/08/2025. [Shippers breath easier as the US and China extend the trade truce](#)

¹⁶ Goldstone, C. 06/08/2025. ['Airfreight business at a crossroads' drive by demand shifts and tariffs](#).

¹⁷ **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.*