

## Cargo Movement Update #247<sup>1</sup>

**Date: 17 August 2025**

### Weekly Snapshot

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

Flows	Current <sup>2</sup>			Previous <sup>3</sup>			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	46 359	52 817	99 176	42 935	48 915	91 850	↑8%
Air Cargo (tons)	4 389	2 352	6 741	4 531	2 318	6 849	↓2%

### Monthly Snapshot

Figure 1 – Cyclical<sup>4</sup> monthly cargo volume, year on year (most metrics: Jul '24 vs Jul '25, % growth)

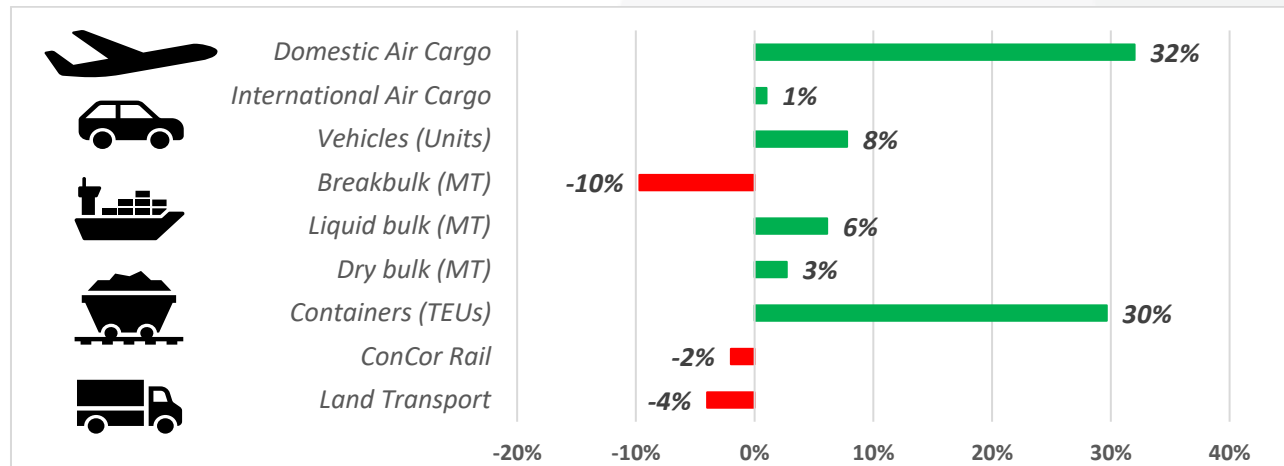
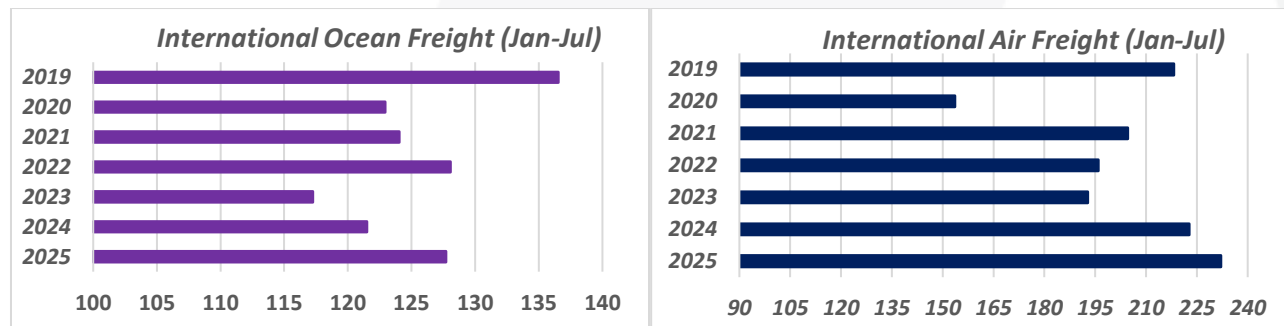


Figure 2 – Year-to-date flows 2019-2025<sup>5</sup>: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



### Key Notes

- An average of ~14 168 TEUs was handled per day, with ~12 581 TEUs projected for next week.
- TNPA July: containers are up by ↑17% (m/m) and ↑30% (y/y). Total bulk: ↓8% (m/m) & ↑3% (y/y).
- Rail cargo handled out of Durban was reported at 5 619 containers, up by ↑105% from last week.
- Cross-border queue: ↑0,2 hrs; transit: ↑0,1 hrs; SA borders: ~9,3 hrs (↓12%); SADC: ~4,7 hrs (↑7%).
- Global spot rates: down for a 9<sup>th</sup> straight week (↓3,1%, or \$74) to \$2 350/40ft. Charter: ↑11% (y/y).
- IATA: global cargo up by ↑0,8% (y/y) for June. More frequent: tonnages ↓2% (w/w) and rates up (↑1%).

<sup>1</sup> This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 247<sup>th</sup> update.

<sup>2</sup> 'Current' means the last seven days (a week's) of available data.

<sup>3</sup> 'Previous' means the preceding 8-14 days (a week) of available data.

<sup>4</sup> 'Monthly' means the last months' worth of available data compared to the same month in the previous year—most metrics: July vs July.

<sup>5</sup> 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 **14 168 TEUs** was handled daily, a notable increase from **13 121 TEUs** the previous week. Despite higher throughput figures this week, port operations were hindered by inclement weather, vacant berths, as well as equipment breakdowns and shortages.

Adverse weather and faulty reefers proved to be the main operational constraints in Cape Town, as high swells, equipment challenges, and inclement weather ensured operational delays in Durban. Strong winds, vacant berths, and staff engagements disrupted operations at our Eastern Cape Ports; however, minimal delays were reported at the Port of Richards Bay. This week, NCT facilitated shift engagements on 13, 15, 18, and 19 August for all four shifts, which negatively impacted operations. The latest reports from TFR suggest that cable theft occurred on the line between City Deep and Mafikeng during the earlier stages of the week, as well as on the line between Pretoria and Durban towards the end of the week. According to the most recent "South African Terminals Update" from Maersk, no waiting times were recorded for CTCT, CTMPT, NCT, DCT Pier 1, or Pier 2. Conversely, PECT recorded three days' waiting time last week.

Global trade tensions sharpened this week as Brazil launched a WTO dispute against the US over new unilateral tariffs, arguing violations of core WTO principles. The US has accepted consultations but insists its tariffs are grounded in national security, a stance that underscores the fragility of the WTO dispute settlement system. Meanwhile, South Africa's DTIC proposed a five-year block exemption to enable exporters to coordinate across supply chains and marketing as a defensive measure against tariff risks.

In shipping, the global containership orderbook has surged to a record **10,4 million TEU** – **31,7%** of the fleet – raising fears of a structural overcapacity reminiscent of the 2004–2009 glut. With over **1 million TEU** of deliveries still due in 2025, the supply imbalance is unlikely to ease soon. Container markets remain volatile: the US is experiencing "trade whiplash" from tariff-driven front-loading earlier in the year, while congestion and blank sailings remain stable. Spot freight rates fell for a ninth straight week, although the charter market continues to defy the downturn with resilient demand across several key corridors. Other developments of note include **(1)** Panama Canal to enter the ports business, **(2)** a fire hits Maersk ship off Liberia, and **(3)** a tanker hit in Russian drone strike on Izmail port.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~627 000 kg** inbound (**↓3%**, w/w) and **~336 000 kg** outbound (**↑1%**). The current levels indicate that cargo is trending at approximately **↑12%** (y/y) above the same level as last year, and about **↑14%** (y/y) above the comparative levels of pre-pandemic 2019. Operationally, uncertainty persists at OR Tambo, with cargo handlers still awaiting clarity from ACSA on lease renewals and the operating model for the midfield cargo terminal. While an open tender process is expected within two months, the lack of formal communication continues to constrain industry planning and investment.

In June, IATA reported that international air cargo demand increased marginally (**↑0,8%**) versus June last year, reflecting the cargo market's uncertainty amid the trade war. Global demand rose slightly more (by **↑1,6%**), with most regions and routes posting single-digit gains. Africa's carriers saw a significant **↑3,9%** (y/y) rise – increasing by **↑6,8%** from last month. Global available cargo space expanded by **↑1,7%** (y/y), as the jet fuel price dropped for the fourth consecutive month. In the high-frequency metrics from World ACD, global airfreight tonnage is down (by **↓2%**, w/w), capacity was primarily unchanged, while overall global prices rose by **↑1%**.

Cross-border road freight movements across these five main South African border posts are up by **↑4%** (m/m) for July. Weekly, cargo movements along the N4 corridor decreased slightly for road transport and increased somewhat for rail transport despite a derailment on the Ressano Garcia line. Truck volumes through the border post were **1 526 HGVs per day** (**↓4%**, w/w). Queue times increased to an average of **6,8 hours** (**↑17%**) at the border, mainly because of long queues on the N4 and road rehabilitation. The average processing time decreased to an average of **4,1 hours** (**↓25%** to **5,5 hours**) per crossing. The rail to Maputo increased slightly to an average of **ten trains daily** (up by **two** from last week). Sugar trains from Eswatini were stable at around **two trains a day**.

Land border crossing times increased slightly – on average – across the SADC region. Overall, the average queue time increased by approximately **20 minutes** from last week, while transit time increased somewhat less (**~10 minutes**). The median border crossing times at South African borders decreased by **an hour and a quarter**, averaging **~9,3 hrs** (**↓12%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) increased by around **20 minutes**, averaging **~4,7 hrs** (**↑7%**). This week, on average, only one SADC border took more than a day to cross, namely Kasumbalesa (with an average of **a day and a bit** from **both sides**). Other developments of note include **(1)** Zimbabwe's anti-smuggling unit disruptions and **(2)** DRC protests.

In July, Transnet Port Terminals handled nearly **100 thousand containers more** than the same time last year. Consequently, container throughput is now up versus last year (**↑0,3%**) and only **↓2,1%** below 2019 levels. It is evident that South Africa's container ports are finally turning a corner. Transnet Port Terminals deserves commendation for recent throughput improvements (including a post-COVID record of **18 689 TEUs** on Week 20, Day 4) – a reflection of greater equipment reliability, operational coordination, and stakeholder alignment. The system is working better, and that matters. These green shoots of progress should be celebrated as hard-won victories after a long period of disruption. But they also bring us closer to existing capacity limits. Without structural reform, infrastructure upgrades, and a stable policy environment, momentum may stall. South Africa must now seize the opportunity to invest meaningfully and unlock long-term growth. As a globally integrated, trade-dependent economy, we must remain competitive, agile, and open for business – with ports that reflect those ambitions.

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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 11 to 17 August (measured in TEUs)

7-day flow reported (11/08/2025 – 17/08/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 923	34 461	↓10%
New Pier (Pier 1)	1 988	13 914	↑6%
Cape Town Container Terminal	2 403	16 819	↑23%
Ngqura Container Terminal	3 069	21 486	↑43%
Port Elizabeth Container Terminal	680	4 762	↓30%
Other	1 105	7 734	↑60%
<b>Total</b>	<b>14 168</b>	<b>99 176</b>	<b>↑8%</b>

Source: Calculated from TPT, 2025. Updated 17/08/2025.

An increased average of ~14 168 TEUs (↑8%) was handled per day for the last week (11 to 17 August, Table 2). The volume was above the projected average of ~12 581 TEUs (↑13% actual versus projected).

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

Despite higher throughput figures this week, port operations were hindered by inclement weather, vacant berths, as well as equipment breakdowns and shortages.

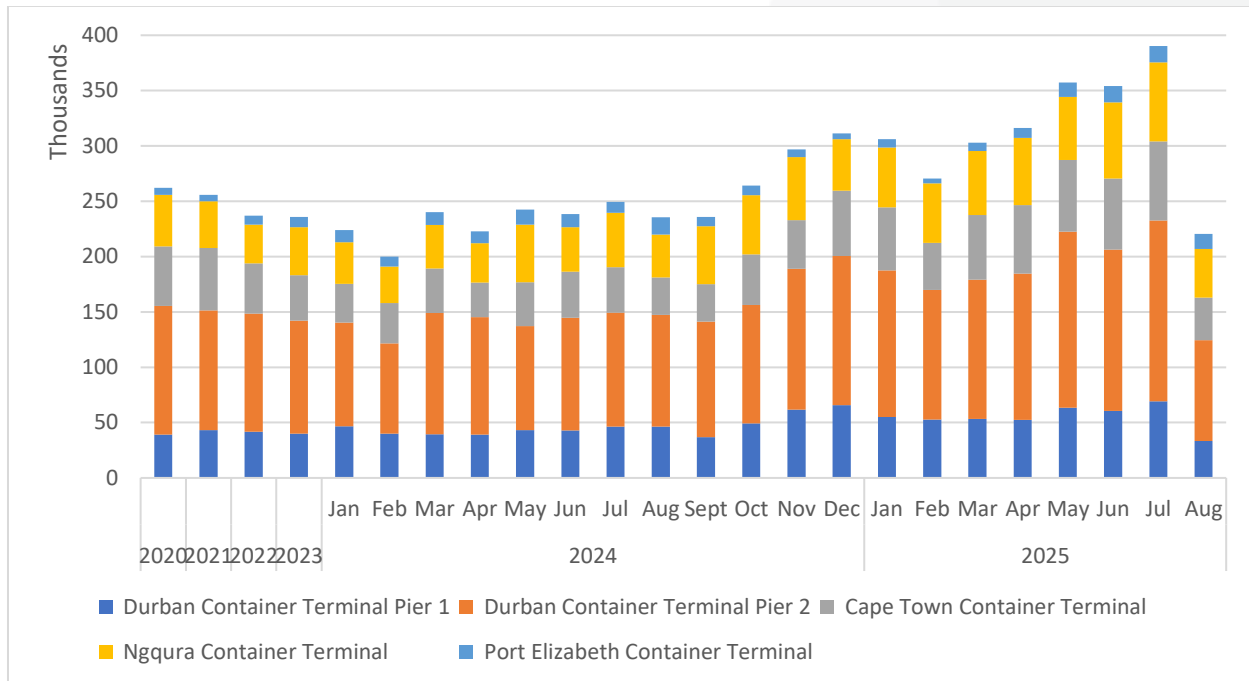
Table 3 – Container Ports – Weekly flow projected for 18 to 24 August (measured in TEUs)

7-day flow projected (18/08/2025 – 24/08/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 351	37 459	↑9%
New Pier (Pier 1)	2 051	14 360	↑3%
Cape Town Container Terminal	1 698	11 887	↓29%
Ngqura Container Terminal	2 088	14 614	↓32%
Port Elizabeth Container Terminal	478	3 347	↓30%
Other	914	6 399	↓17%
<b>Total</b>	<b>12 581</b>	<b>88 066</b>	<b>↓11%</b>

Source: Calculated from TPT, 2025. Updated 17/08/2025.

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 17/08/2025.

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 (21 July to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 17/08/2025.

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 (21 July to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 17/08/2025.

### b. TNPA: July update

TNPA has released consolidated port statistics for July<sup>6</sup>, with excellent returns for containers, but less so for the bulk industries across the respective sub-sectors:

- Containers increased monthly by a significant **↑17%** (m/m) and increased annually by **↑30%** (y/y).
- Total bulk cargo decreased monthly by **↓8%** (m/m), but increased annually by **↑3%** (y/y).
- Vehicles increased monthly and yearly by **↑8%** (m/m & y/y).

The following table shows the respective changes versus June:

Table 4 – TNPA – Monthly volume and growth: July 2025

	June	July	Movement	% change
<b>Containers (TEUs)</b>	<b>373 644</b>	<b>436 428</b>	<b>62 784</b>	<b>17%</b>
Landed	188 732	222 948	34 216	18%
Shipped	184 912	213 480	28 568	15%
<b>Dry bulk (MT)</b>	<b>15 277 178</b>	<b>13 528 456</b>	<b>-1 748 722</b>	<b>-11%</b>
<b>Liquid bulk (MT)</b>	<b>2 713 689</b>	<b>3 090 421</b>	<b>376 732</b>	<b>14%</b>
<b>Breakbulk (MT)</b>	<b>642 527</b>	<b>470 204</b>	<b>-172 323</b>	<b>-27%</b>
<b>Vehicles (Units)</b>	<b>70 291</b>	<b>75 662</b>	<b>5 371</b>	<b>8%</b>
<b>Total cargo (excl. Vehicles)</b>	<b>18 633 394</b>	<b>17 089 081</b>	<b>-1 544 313</b>	<b>-8%</b>

Source: [TNPA](#), updated 15/08/2025.

Transnet Port Terminals handled **436 thousand containers** and **17,1 million metric tonnes** of bulk cargo during July, significantly more containers than the **373 thousand containers**, but fewer bulk cargoes than the **18,7 million metric tonnes** of bulk cargo handled last month. However, compared to cyclical trends, the number of containers is up by nearly **100 thousand**. For bulk cargoes, annual throughput increased by single-digit percentages (except for breakbulk), as evidenced by the following:

<sup>6</sup> Transnet. 2025. [Port statistics](#).

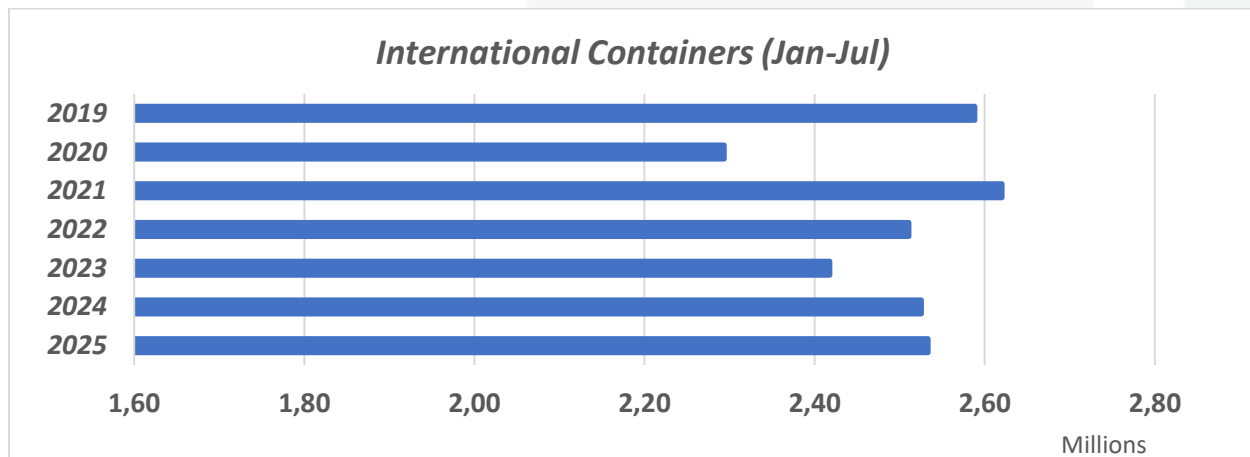
Table 5 – TNPA – Cyclical volume and growth: July 2019, 2024, and 2025

	2019	2024	2025	% '20 –'25	% '24-'25
<b>Containers (TEUs)</b>	<b>386 813</b>	<b>336 599</b>	<b>436 428</b>	<b>13%</b>	<b>30%</b>
Landed	197 148	181 349	222 948	13%	23%
Shipped	189 665	155 250	213 480	13%	38%
<b>Dry bulk (MT)</b>	<b>13 428 462</b>	<b>13 172 087</b>	<b>13 528 456</b>	<b>1%</b>	<b>3%</b>
<b>Liquid bulk (MT)</b>	<b>3 438 448</b>	<b>2 912 531</b>	<b>3 090 421</b>	<b>-10%</b>	<b>6%</b>
<b>Breakbulk (MT)</b>	<b>285 104</b>	<b>520 731</b>	<b>470 204</b>	<b>65%</b>	<b>-10%</b>
<b>Vehicles (Units)</b>	<b>69 341</b>	<b>69 997</b>	<b>75 662</b>	<b>9%</b>	<b>8%</b>
<b>Total cargo (excl. Vehicles)</b>	<b>17 152 014</b>	<b>16 605 349</b>	<b>17 089 081</b>	<b>0%</b>	<b>3%</b>

Source: [TNPA](#), updated 15/08/2025.

Only breakbulk throughput is down annually ( $\downarrow 10\%$ , y/y); whereas dry bulk ( $\uparrow 3\%$ ), liquid bulk ( $\uparrow 6\%$ ) and vehicle throughput have increased compared to July 2024. When reading the cyclical figures with the year-to-date figures (note *Figure 2*, the optimism continues, as South Africa's bulk cargoes are up by  $\uparrow 5,1\%$  YTD. Moreover, with the significant improvement in container throughput for July, the container YTD has finally caught up to last year, after being down by  $\downarrow 4,2\%$  in June, as illustrated by the following year-to-date for containers to June:

Figure 6 – Year-to-date flows 2019-2025: containers, y/y (TEU millions)



Source: [TNPA](#), updated 15/08/2025.

As predicted last month, container throughput is now up versus last year ( $\uparrow 0,3\%$ ) and only  $\downarrow 2,1\%$  below 2019 levels (after being down by  $\downarrow 4,7\%$  in June). South Africa's container ports are finally turning a corner, with Transnet Port Terminals earning praise for recent performance improvements. These gains reflect more reliable equipment, stronger coordination, and a level of stakeholder alignment not seen in years – a welcome shift after a prolonged period of disruption.

### c. Summary of port operations

#### i. Weather and other delays

- Adverse weather and faulty reefers proved to be the main operational constraints in Cape Town.
- High swells, equipment challenges, and inclement weather ensured operational delays in Durban.
- Strong winds, vacant berths, and staff engagements disrupted operations at our Eastern Cape Ports.



- Minimal delays were reported at the Port of Richards Bay.

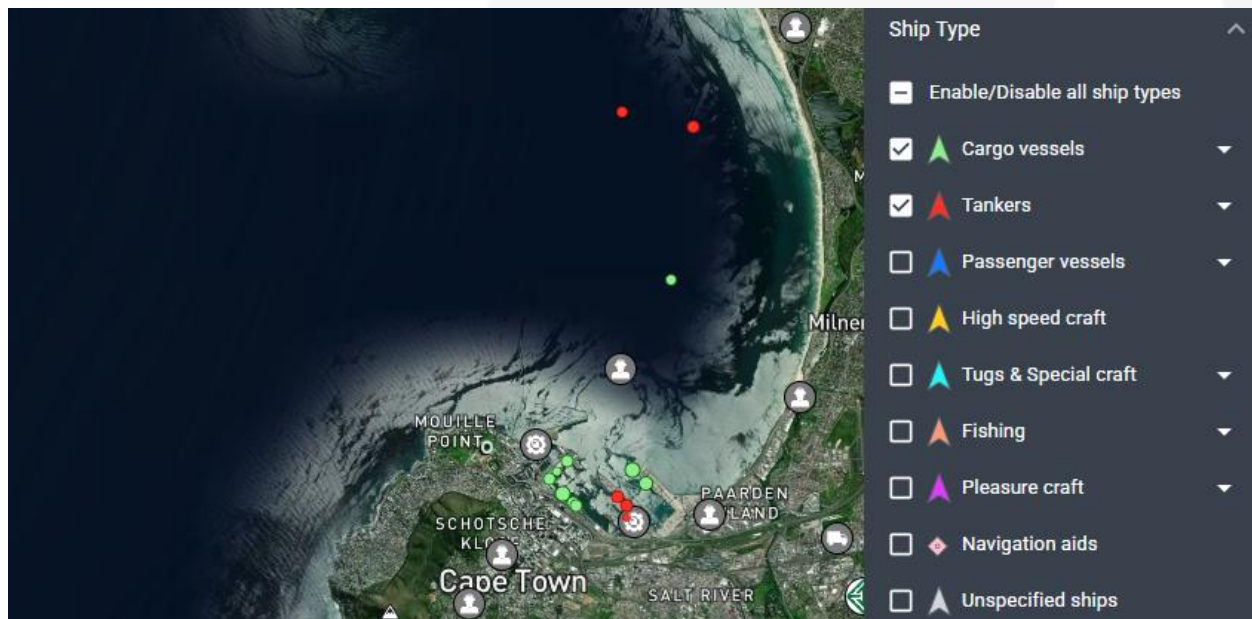
## ii. Cape Town

On Friday, CTCT recorded three vessels at berth and none at anchor, as adverse weather and faulty reefers proved to be the primary operational constraints at the port. On the landside, between Monday and Friday, the terminal managed to service at least 5 896 trucks while handling approximately 273 rail units. On the waterside, the terminal executed approximately 7 326 container moves across the quay during the same period. Additionally, this week the terminal operated with between **seven and eight STS cranes**, between **22-23 RTGs**, and around **59 hauliers**. Cranes LC7 and LC9 were the most notable crane absentees before the weekend, with both machines expected back in service over the weekend.

On Friday, CTMPT recorded three vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 6 330 tons of cement, 4 560 tons of wheat, and 500 container moves on the waterside. On the landside, 351 trucks were processed during the same period. Stack occupancy was recorded at 61% for general cargo, 46% for reefers, and 73% for empties. For the most significant part of the week, the terminal operated with three cranes and four straddle carriers.

Between 4 and 10 August, the FPT terminal handled six vessels: two multi-cargo, one dry bulk, two container, and one vessel containing fruit. Berth occupancy during this period was recorded at 39%. The terminal planned to handle five more vessels between 11 and 17 August, with another six vessels scheduled between 18 and 24 August. Inclement weather, as well as the late arrival of cargo, accounted for the most significant operational constraints during this period.

Figure 7 – Cape Town vessel view (per vessel group)



Source: Marine Traffic. Updated 17/08/2025 at 14:00.

## iii. Durban

On Friday, Pier 1 recorded two vessels on berth, with one vessel at anchor. Between Monday and Friday, the terminal executed at least 3 738 gate moves and 165 rail moves on the landside. The **average TTT** for the week was **~39 minutes (↓26%, w/w)** and an average **staging time** of **~28 minutes (↓7%)**. Additionally, the

terminal moved over 5 200 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 three 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 **9-12 gangs** and moved over **19 300** containers across the quay between Monday and Friday on the waterside. Approximately **13 985** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~84 minutes (↑11%, w/w)** and an average **staging time** of also **~116 minutes (↑61%)**. Approximately 2 277 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **63** and **71** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **62%** during this period.

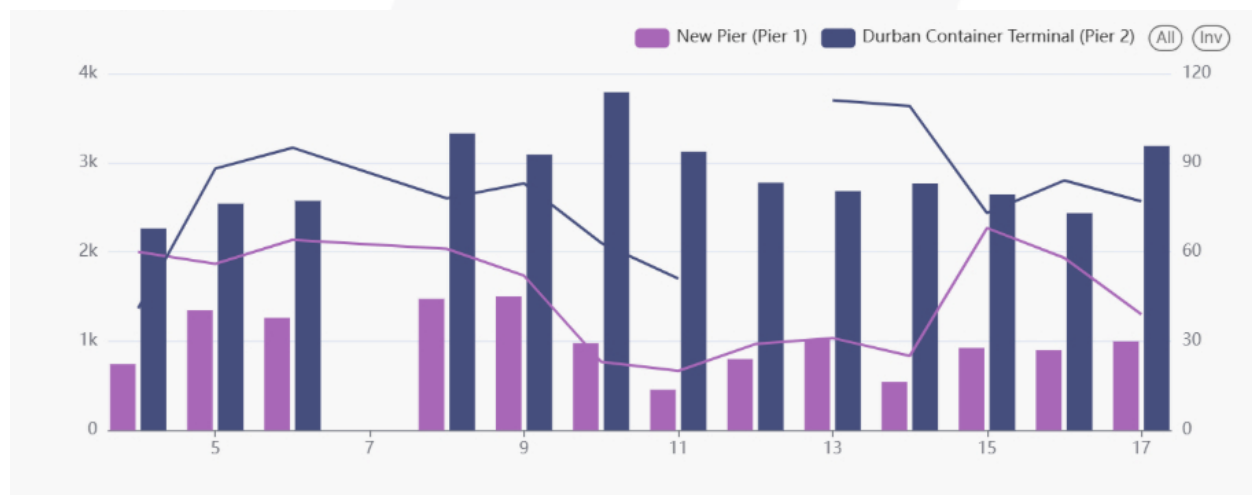
Durban's MPT terminal recorded three vessels at berth on Thursday and none at outer anchorage. Stack occupancy for containers was recorded at 47% and the reefer stack at 47%, with the breakbulk stack at 50%. In the preceding 24 hours, 5 145 tons of breakbulk and 735 containers were handled on the waterside. On the landside, 307 container trucks were serviced at a TTT of ~38 minutes. Additionally, 68 breakbulk trucks, containing 1 910 tons, were serviced. During this period, three cranes, nine reach stackers, seven forklifts, and 21 ERFs were in operation. The latest reports from TPT maintain that the fourth crane is only scheduled to return to service around 21 December.

Between Thursday and Friday, the Maydon Wharf MPT recorded one vessel at berth and zero at anchorage. On the waterside, 4 486 tons were handled, while 34 trucks, containing 1 314 tons, were handled on the landside. During the same period, the agri-bulk facility had zero vessels at berth and zero vessels at anchor.

On Friday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with zero at anchorage. In the preceding 24 hours, the terminal handled 1 416 road units and 101 units on rail on the landside, while 1 754 units were handled on the waterside. Overall stack occupancy was 58%. During this period, the terminal had 169 high-and-heavy (abnormal loads) on hand and managed to handle 84.

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.

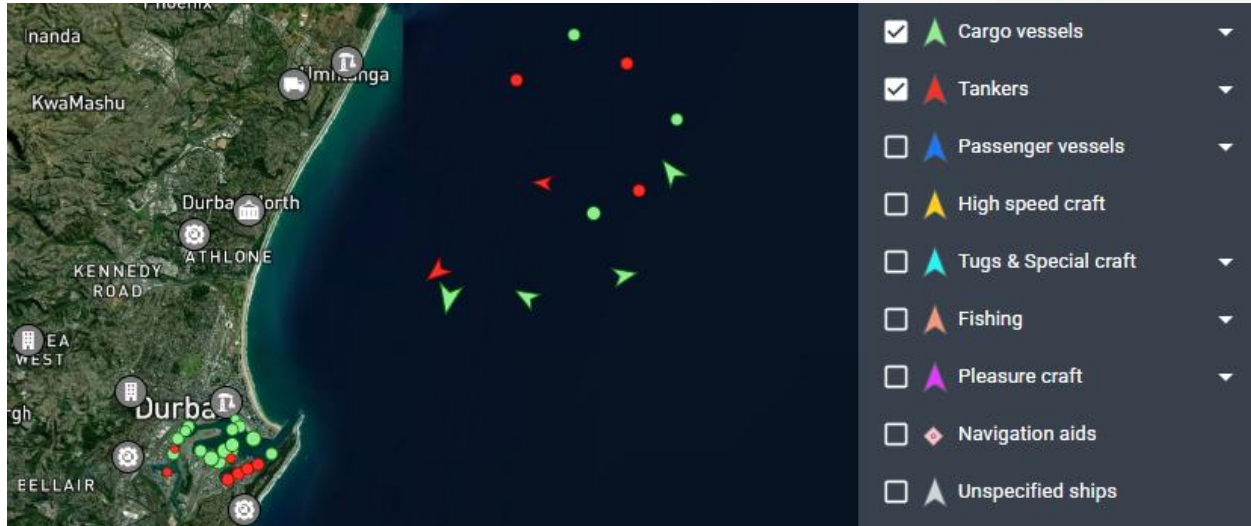
*Figure 8 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)*



Source: Calculated using data from Transnet, 2024, and updated 17/08/2025.

The queue of container vessels waiting outside Durban has been stable since last week. On Monday evening (18 August), **one** container vessel was waiting outside the anchorage at Pier 1. The queue of dry (**one**), liquid (**five**), and breakbulk (**one**) vessels has also been stable since last week. The following snapshot shows the current status quo:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 17/08/2025 at 14:00.

#### iv. Richards Bay

On Wednesday, the Port of Richards Bay had seven vessels at anchor and 12 on the berth, translating to three vessels at DBT, four at MPT, four at RBCT, and one at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter were deployed to support marine resources towards the end of the week. No operational delays were reported by TNPA this week.

The daily average coal throughput for the week decreased significantly to around **83 000 tons** (**↓33%**, w/w). An average of **21 trains** was serviced on the landside (up by **one** from last week), slightly below the target of 22.

#### v. Eastern Cape ports

On Friday, NCT recorded three vessels on berth and none at anchor, with zero vessels drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. For the 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 56% for reefers, 80% for reefer ground slots, and 26% for the general stack. Despite experiencing adverse weather, the terminal handled approximately 3 953 TEUs and 183 reefers on the waterside. Approximately 755 trucks were processed on the landside at a TTT of ~41 minutes. For the most significant part of the week, the terminal had seven STS cranes, between 25 and 26 RTGs, and around 52 hauliers in service. This week, the terminal facilitated shift engagements on 13, 15, 18, and 19 August for all four shifts, which had a negative impact on operations.

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, 175 trucks were processed at a TTT of ~22 minutes on the landside, while 386 TEUs and 177 reefers were handled

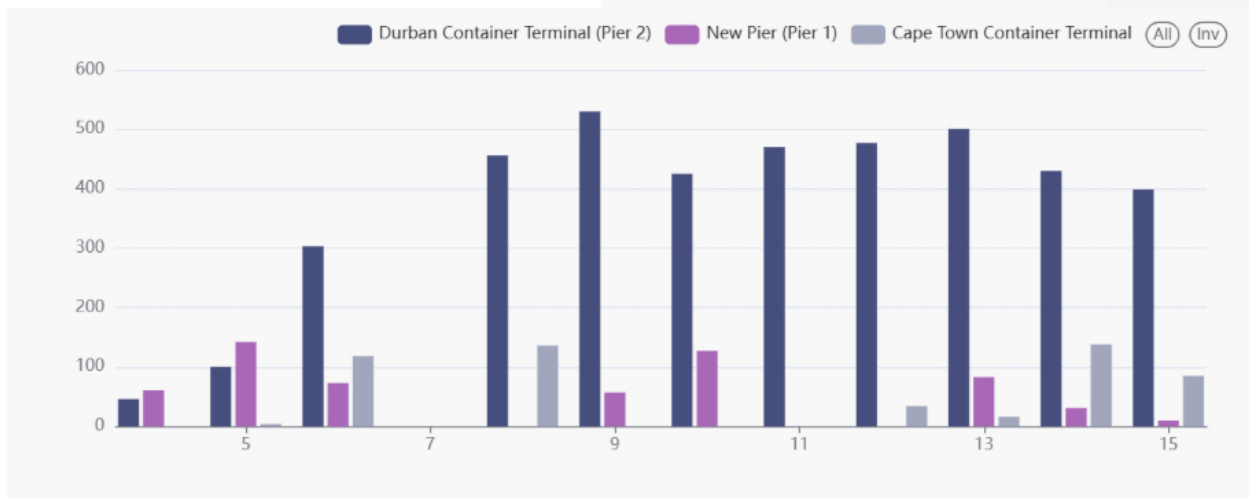
across the quay on the waterside. Stack occupancy was recorded at 62% for the general stack, 56% for reefers, and 67% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and ten straddles in service.

On Friday, the Ro-Ro terminal had zero vessels on berth and zero at outer anchorage. During the preceding 24 hours, the terminal handled around 1 501 units on the waterside, resulting in a stack occupancy of 30%.

#### vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that cable theft occurred on the line between City Deep and Mafikeng during the earlier stages of the week. Additionally, towards the end of the week, instances of intermittent cable theft occurred near Pretoria, on the line to Durban. Further, towards the end of the week, DCT Pier 2 had 685 ConCor units on hand with a dwell time of 120 hours and 381 over-border units with a dwell time of 55 days.

Figure 10 – TFR: Rail handled (Pier 1, Pier 2, and CTCT)



Source: Calculated using data from Transnet, 2024. Updated 17/08/2025.

In the last week (11 to 17 August), rail cargo on the ConCor line out of Durban was reported at **5 619** containers, up by a significant **↑105%** from the previous week's **2 745** containers.

#### vii. General Update

According to the most recent "South African Terminals Update" from Maersk, waiting times at the South African Ports are encouraging to say the least. As of last week, no waiting times were recorded for CTCT, CTMPT, NCT, DCT Pier 1, or Pier 2. Conversely, PECT recorded three days' waiting time last week.

Lastly, some updates on fruit exports. Since the start of the deciduous season in week 40, fruit exports through South African ports have risen by **↑13%** compared to the same period last year, reflecting stronger demand and improved throughput performance.

## 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 (11 to 17 August).<sup>7</sup> For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in August 2024 averaged ~887 000 kg.

Table 6 – International inbound and outbound cargo from OR Tambo

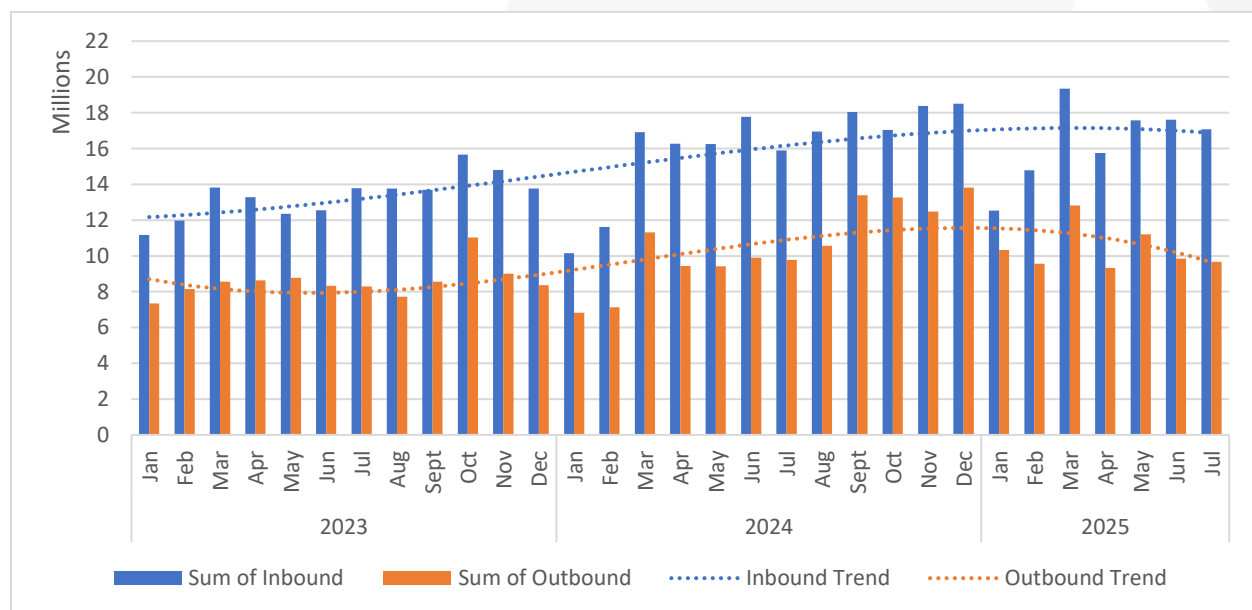
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	626 949	4 388 641	↓3%
Volume outbound	336 054	2 352 381	↑1%
Total	963 003	6 741 022	↓2%

Courtesy of ACOC. Updated: 17/08/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to ~627 000 kg inbound (↓3%, w/w) and ~336 000 kg outbound (↑1%). The current levels indicate that cargo is trending at approximately ↑12% (y/y) above the same level as last year, and about ↑14% (y/y) above the comparative levels of pre-pandemic 2019.

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

Figure 11 – International cargo for OR Tambo – volumes per month (kg millions)



Calculated from ACOC. Updated: 17/08/2025.

### b. Air cargo operations

The following air cargo operations are worth noting this week, with much of the discourse adding to the recent narrative in the industry:

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

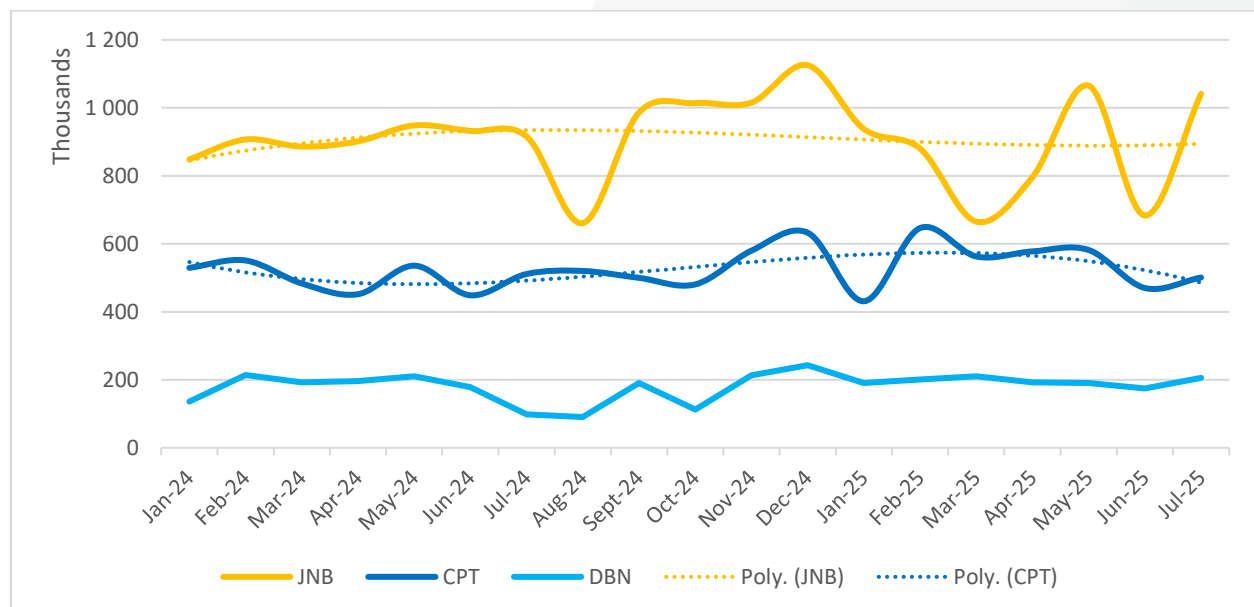


- Cargo handlers continue to operate without formal lease agreements. They are still awaiting communication from ACSA regarding both their tenancy status and the allocation model for the new midfield cargo terminal.
- No concrete updates have been received from ACSA, though an open tender process for warehousing is anticipated within the next two months.
- The uncertainty around the midfield development and lack of transparent engagement remain pressing concerns, as handlers require clarity to make operational and investment decisions.
- Road closures related to the G20 summit have added further complexity to cargo movement planning at ORTIA, highlighting the need for better coordination between ACSA and industry stakeholders.

### c. Domestic air cargo

The following figure shows the movement since the start of last year, with the rebound for July noticeable:

Figure 12 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 17/08/2025.

## 3. Road and Regional Update

### a. Lebombo border post update

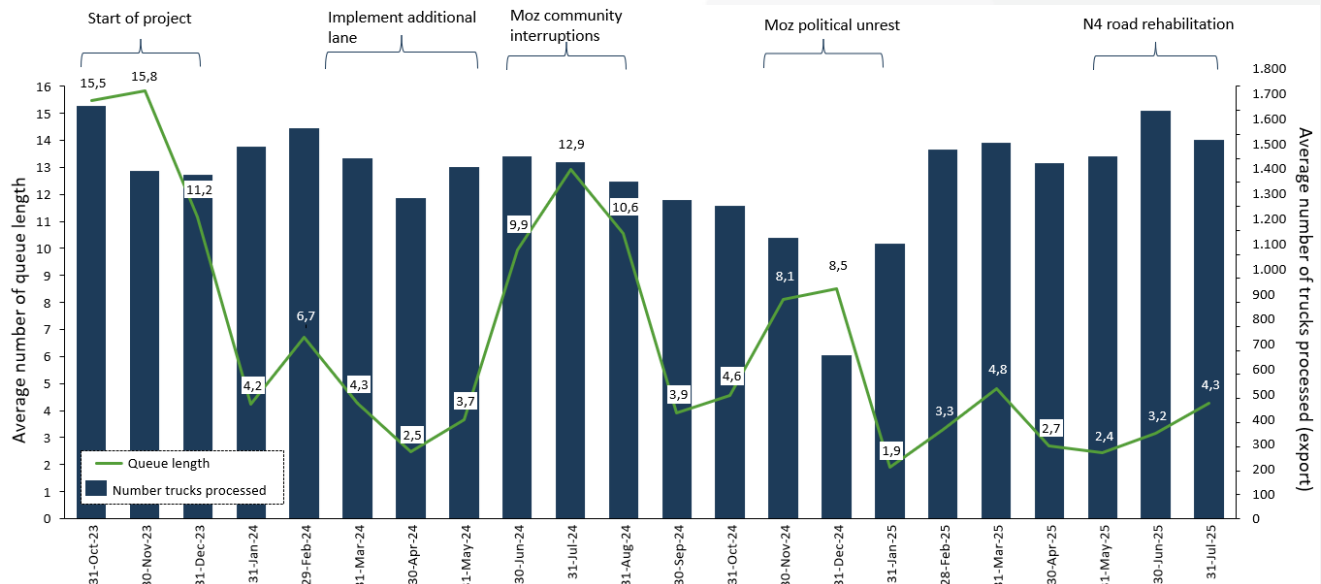
In the last week (11 to 17 August), cargo movements along the N4 corridor decreased slightly for road transport and increased somewhat for rail transport despite a derailment on the Ressano Garcia line. The following notes summarise the recent developments:

- **N4 queues and road rehabilitation:**
  - On Friday, the queue from the border down towards Hectorspruit is 16km, 640 trucks, as 500 trucks were in staging and queuing to join the N4 to the border.
  - Slow-lane repairs from BP to Lebombo border commenced last week, with radio-controlled release of trucks into the yard as space permits.
  - Work on this section runs until 19 August, after which the westbound lane will be rehabilitated, expected to conclude by the end of August.



- The current queue length is some cause for concern; however, as illustrated by the following figure (showing the queues and truck volumes since the end of October 2023), the average has remained relatively low since the start of the year despite the average number of trucks processed (according to SARS data) remaining elevated.

Figure 13 – N4 Corridor: Monthly average N4 Queue length vs number of trucks processed per day (exports)



Source: B4SA Pulse Monitoring Report and SARS. 13/08/2025.

- For this week, truck volumes through the border post were **1 526 HGVs per day** (↓4%, w/w).
- Queue times increased to an average of **6,8 hours** (↑17%) at the border, as the average processing time decreased to an average of **4,1 hours** (↓25% to 5,5 hours) per crossing.
- The rail to Maputo increased slightly to an average of **ten trains daily** (up by **two** from last week).
- Sugar trains from Eswatini were stable at around **two trains a day**.
- Lastly, there was a derailment on the Ressano Garcia line on Friday evening. One of the two lines reopened around midday on Monday, as traders expect an increase in road traffic to supplement stock in the port.

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

Table 7 – 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
<b>Design Capacity</b>	<b>1 500</b>	<b>1 500</b>	<b>1 200</b>	<b>200</b>	<b>n/a</b>	<b>50</b>	<b>50</b>	<b>2 000</b>	<b>20</b>	<b>10</b>	<b>6</b>	<b>4</b>
<b>Average</b>	<b>1 526</b>	<b>1 482</b>	<b>1 152</b>	<b>216</b>	<b>28</b>	<b>80</b>	<b>44</b>	<b>269</b>	<b>10</b>	<b>7</b>	<b>1</b>	<b>2</b>
<b>% (w/w)</b>	<b>-4%</b>	<b>-6%</b>	<b>3%</b>	<b>-5%</b>	<b>-20%</b>	<b>-24%</b>	<b>-42%</b>	<b>-18%</b>	<b>13%</b>	<b>-13%</b>	<b>-25%</b>	<b>-36%</b>
<b>% of design capacity</b>	<b>106%</b>	<b>92%</b>	<b>96%</b>	<b>126%</b>	<b>n/a</b>	<b>179%</b>	<b>99%</b>	<b>15%</b>	<b>50%</b>	<b>94%</b>	<b>43%</b>	<b>36%</b>

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 17/08/2025.

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

Figure 14 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 17/08/2025 at 14:00.

## b. SADC cross-border and road freight update

The following table shows the consolidated monthly flow of HGVs across some of the key borders for July:

Table 8 – HGVs – Main South African borders (both directions)

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	15 289	11%	14 756	7%	30 045	9%
Groblersbrug	6 902	1%	6 215	1%	13 117	1%
Kopfontein	6 470	-4%	613	-1%	6 847	-3%
Ramatlhabama	4 350	2%	1 884	-20%	6 234	-6%
Skilpadshak	8 145	7%	1 676	2%	9 821	6%

Source: TLC & FESARTA, 15/08/2025.

In total, road freight movements across these five main South African border posts are up by **↑4% (m/m)**.

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

- Overall, the average queue time increased by approximately **20 minutes** from last week, while transit time increased slightly less (**~10 minutes**).
- The median border crossing times at South African borders decreased by **an hour and a quarter**, averaging **~9,3 hrs (↓12%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by around **20 minutes**, averaging **~4,7 hrs (↑7%)**.

### 1. Zimbabwe anti-smuggling unit disruptions:

- a. Unit at Lundi causing significant delays; on Monday, at least 10 trucks were referred to Masvingo despite no officers on duty due to a public holiday. Many inspections were mere “sightings” of containers already verified at Condep at the border, resulting in unnecessary waits of hours or days.
- b. FESARTA has escalated concerns to Zimra and the Zimbabwean Presidency in a formal letter detailing these inefficiencies.

### 2. DRC protests:

- a. Demonstrations reported between Bungu Bungu–Tumbwe and Luisha–Lumata, with violence also in Lubumbashi.
- b. Transporters advised drivers to park in safe truck stops as protesters were damaging trucks on the road.

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

*Table 9 – Delays<sup>8</sup> summary – South African borders (both directions)*

Border Post	Direction	HGV <sup>9</sup> 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	497	21,0	5,5	20,6	14 910	3 479
Beitbridge	Zimbabwe-SA	437	12,2	2,2	12,1	13 110	3 059
Groblersbrug	SA-Botswana	235	22,1	1,1	22,1	7 050	1 645
Martin's Drift	Botswana-SA	197	2,5	0,4	2,3	5 910	1 379
Kopfontein	SA-Botswana	222	6,7	1,5	6,4	6 660	1 554
Tlokweng	Botswana-SA	20	0,6	0,2	0,4	600	140
Vioolsdrift	SA-Namibia	30	3,6	1,5	3,4	900	210
Noordoewer	Namibia-SA	20	2,0	0,4	1,6	600	140
Nakop	SA-Namibia	30	5,0	0,6	5,0	900	210
Ariamsvlei	Namibia-SA	20	1,4	0,4	1,2	600	140
Skilpadshek	SA-Botswana	287	3,8	1,3	3,5	8 610	2 009
Pioneer Gate	Botswana-SA	48	0,0	0,0	0,0	1 440	336
Lebombo	SA-Mozambique	1 574	4,1	1,2	4,1	47 220	11 018
Ressano Garcia	Mozambique-SA	1 534	2,1	0,3	2,1	46 020	10 738
<b>Sum/Average</b>		<b>5 151</b>	<b>6,2</b>	<b>1,2</b>	<b>6,1</b>	<b>154 530</b>	<b>36 057</b>

Source: TLC, FESARTA, & Crickmay, week ending 10/08/2025.

*Table 10 – 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	17,3	4,4	17,0	9 600	2 240
Central Corridor	798	1,5	0,3	1,4	23 940	5 586
Dar Es Salaam Corridor	1 819	9,7	0,9	9,5	54 570	12 733
Maputo Corridor	3 108	3,1	0,7	3,1	93 240	21 756
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 565	9,5	1,3	9,3	106 950	24 955
Northern Corridor	2 817	1,6	0,3	1,6	92 520	21 588
Trans Caprivi Corridor	365	1,8	0,5	1,6	10 950	2 555
Trans Cunene Corridor	100	3,0	0,7	2,8	3 000	700
Trans Kalahari Corridor	116	16,0	2,8	15,8	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
<b>Sum/Average</b>	<b>13 235</b>	<b>5,3</b>	<b>0,9</b>	<b>5,1</b>	<b>405 060</b>	<b>94 514</b>

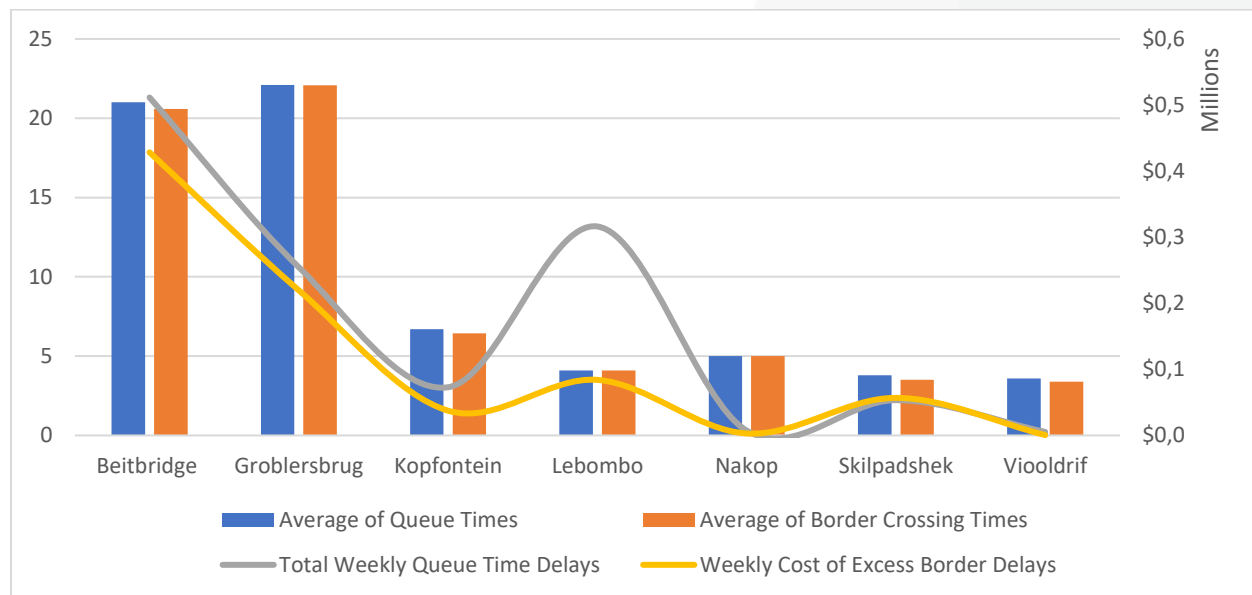
Source: TLC, FESARTA, & Crickmay, week ending 10/08/2025.

<sup>8</sup> 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.

<sup>9</sup> Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

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

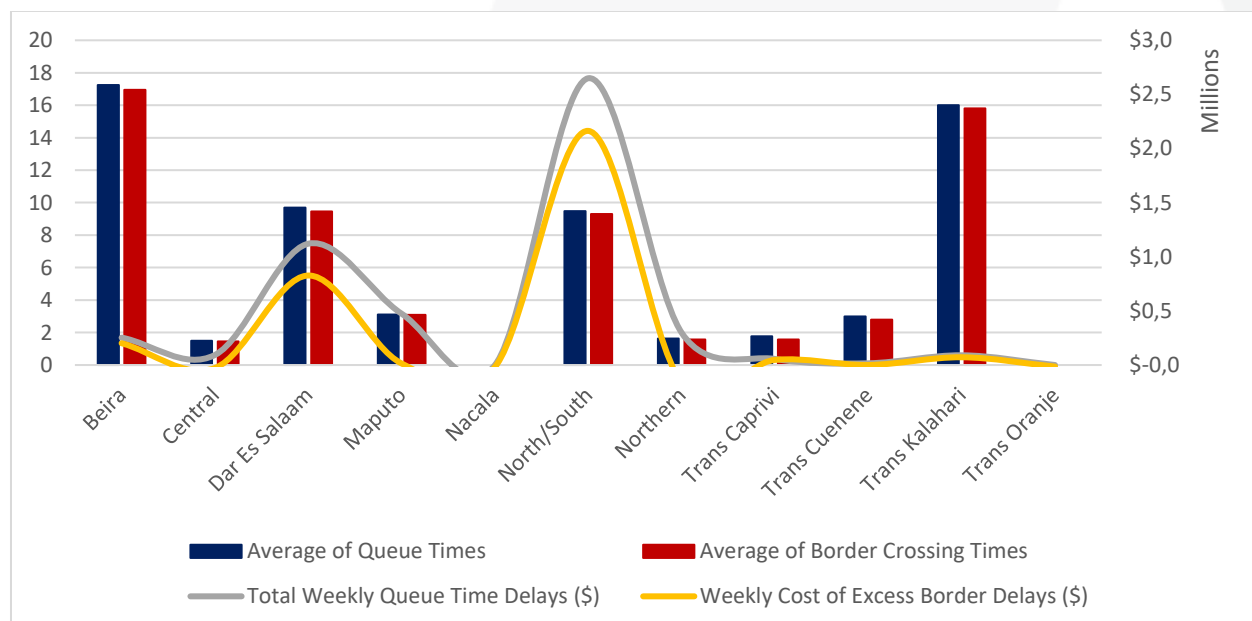
Figure 15 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 10/08/2025.

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

Figure 16 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 10/08/2025.

In summary, cross-border queue time averaged **~5,3 hours** (up by **~0,2 hours** from the previous week's **~5,1 hours**), indirectly costing the transport industry an estimated **\$5,1 million (R90 million)**. Furthermore, the week's average cross-border transit times also hovered around **~5,1 hours** (up by **~0,1 hours** from the **~5,0 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$3,1 million (R55 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$2,2 million (R145 million)**, down by **~R8 million** or **↓5,1%** from **~R152 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)** global trade, **(b)** the global shipping industry, and **(c)** the global aviation industry.

##### a. Global trade

Brazil has formally initiated a WTO dispute (DS640) against the United States, challenging recent tariff measures that include a general **10% duty** and **50% tariffs** on a wide range of Brazilian goods. Brazil argues these actions violate core WTO obligations – namely the MFN principle, bound tariff commitments, and the Dispute Settlement Understanding (DSU) – since Washington chose unilateral tariffs over multilateral procedures.<sup>10</sup>

According to the WTO, Brazil contends the US has “*sought redress through tariff measures, rather than with recourse to the DSU.*” Under WTO rules, consultations begin a 60-day window to resolve the dispute, after which Brazil may request a panel. On 19 August, the US formally accepted consultations but asserted that the tariffs stem from national security measures and are therefore “*political matters not susceptible to WTO review.*”<sup>11</sup>

This case highlights broader concerns about the effectiveness of WTO dispute settlement, given the Appellate Body’s paralysis. Brazil nonetheless views the dispute as essential to defend multilateral rules and signal resistance to unilateralism. In parallel, South Africa’s DTIC has proposed a five-year block exemption for exporters to coordinate across supply chains and marketing – an unconventional countermeasure to rising tariff risks. Both moves underscore tensions between trade policy, institutional limits, and efforts to safeguard competitiveness.<sup>12</sup>

##### b. Global shipping industry

###### i. Global container orderbook continues to expand

The containership orderbook – the total volume of containership capacity currently contracted and scheduled for future delivery but not yet delivered – has reached a record high of **10,4 million TEU**, following the flurry of new ship orders placed in the last 12 months, with the orderbook ratio rising to **31,7%** of the fleet – its highest levels since 2010:

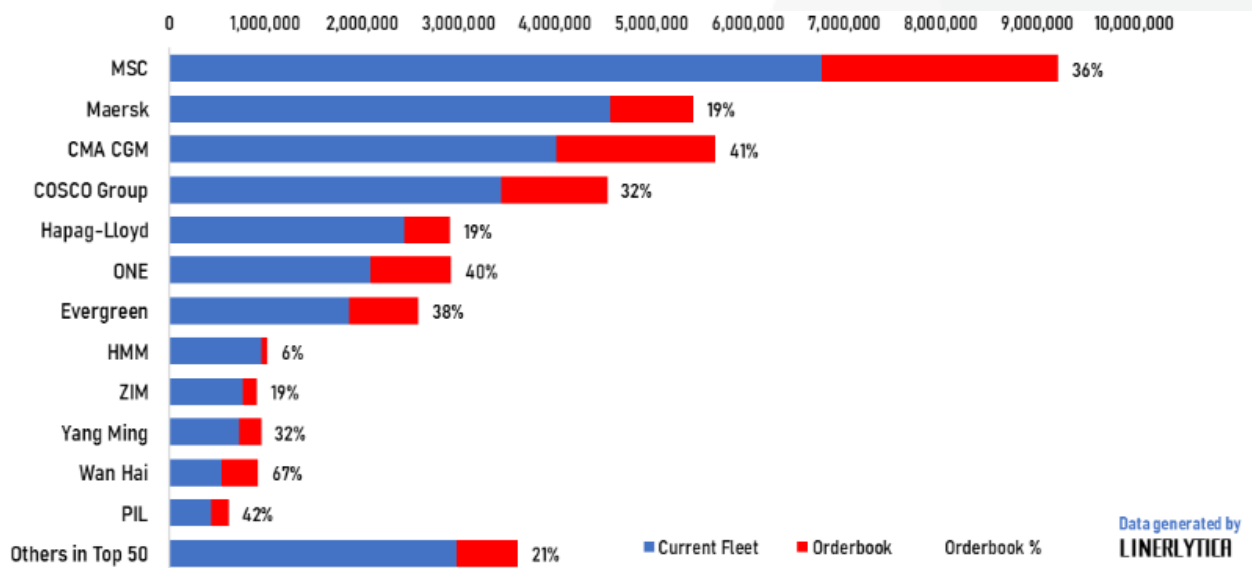
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<sup>10</sup> WTO.11/08/2025. [Brazil initiates WTO dispute regarding US tariff measures.](#)

<sup>11</sup> Teles, I. 19/08/2025. [US accepts Brazil's WTO consultation request over tariffs.](#)

<sup>12</sup> Vinti, C. 14/08/2025. [Brazil takes the US to the WTO and the DTIC proposes a block competition exemption for the promotion of exports.](#)

Figure 17 – Top 12 carriers: Operated capacity & Orderbook (as at August 2025, in TEU)



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

The last time the orderbook ratio exceeded this level in 2004-2009, it ended in a decade-long supply overhang that took 10 years to clear. There are still over **1 million TEU** of pending ship orders that are due to be added before the end of this year. Jan Tiedemann, senior analyst at Alphaliner, noted that neutralising today's orderbook would require scrapping every containership built before 2010 – an outcome he described as highly unrealistic. This highlights the scale of the looming capacity challenge and makes clear that the supply glut is unlikely to be resolved quickly.<sup>13</sup>

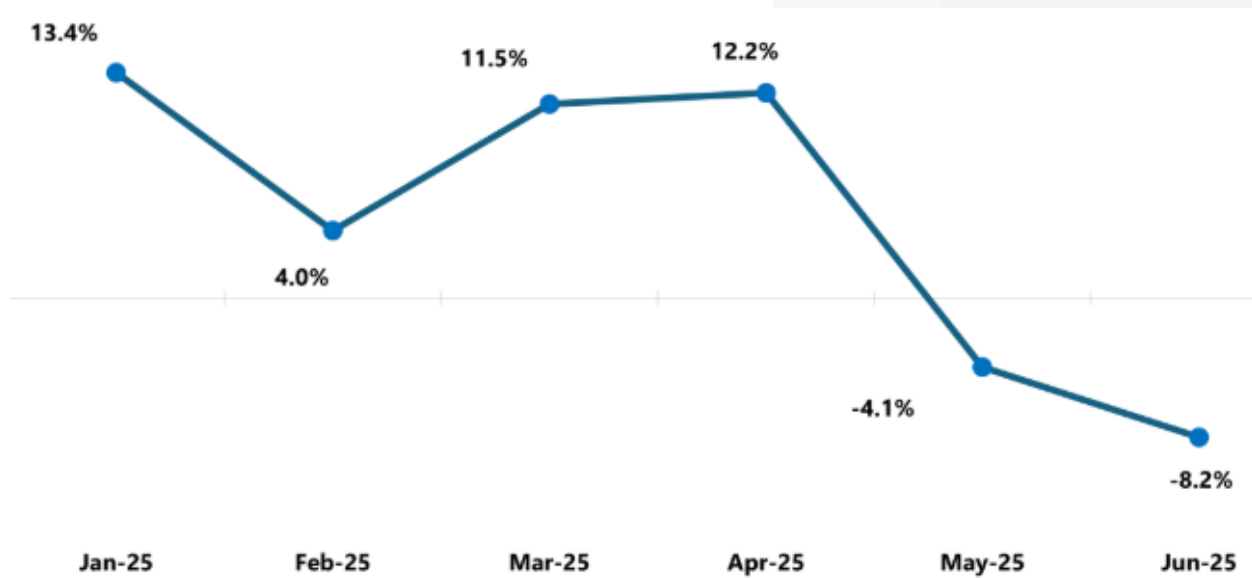
## ii. Global container sector summary

The 90-day tariff extension for Chinese imports, now scheduled to expire on 10 November 2025, has limited impact on container volumes, as much of the peak-season cargo had already been front-loaded during June and July. Concurrently, Sea-Intelligence identifies a pronounced "trade whiplash" phenomenon in early 2025: US import volumes surged due to tariff-avoidance front-loading, triggering an artificial boom that was swiftly followed by a steep bust as those volumes normalised.

<sup>13</sup> Chambers, S. 20/08/2025. [Neutralising the boxship orderbook would require scrapping every pre-2010 vessel](https://www.reuters.com/containerships/neutralising-the-boxship-orderbook-would-require-scrapping-every-pre-2010-vessel-2025-08-20/).



Figure 18 – Laden import TEU growth y/y (USA Top 10 ports)



Source: [Sea Intelligence](http://Sea Intelligence)

Elsewhere, port congestion has remained stable this week and is trending around **2,75 million TEU**, accounting for **8,6% of the current fleet**.<sup>14</sup> The cancelled sailings have also remained stable, with the Drewry “Cancelled Sailings Tracker” trending around **7%** for the period 18 August to 21 September. Despite the ongoing rate reduction (see below), Gemini carriers in particular have maintained a zero blank sailing record on their core services, largely ignoring the rate slide as they continue to prioritise volumes over freight rates.

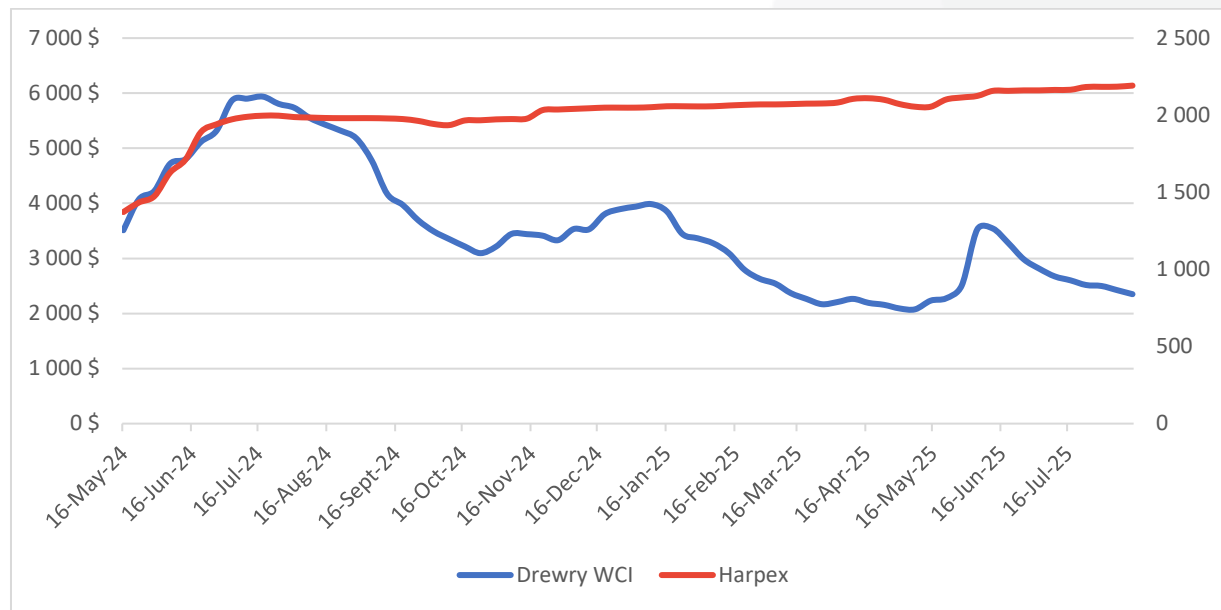
### iii. Global freight rates

Global spot rates declined for a 9<sup>th</sup> consecutive week, as Drewry's “World Container Index” is down by **↓3,1%** (or **\$74**) to **\$2 350 per 40-ft container**.<sup>15</sup> Rates are now down by **↓38%** year-on-year, as the slide continues unabated. Meanwhile, the *Harper Petersen Index* (Harpex) continues to rally and traded around **2 192 points** on Friday (**↑11%, y/y**).

<sup>14</sup> Linerlytica. 18/08/2025. [Market Pulse – Week 33](#).

<sup>15</sup> Drewry. 15/08/2025. [World Container Index](#).

Figure 19 – World Container Freight Index (\$ per 40ft) & Harper Petersen Charter Index



Source: Calculated from [Drewry](#) & [Harpex](#)

In contrast to spot rates, the charter market remains stubbornly resilient despite the freight market turbulence, with demand in confident Asia, Med, the Middle East and Latin America corridors still firm enough to support the high charter rates.

#### iv. Further developments of note

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

##### 1. Panama Canal to enter the ports business:

- The Panama Canal Authority (PCA) plans to tender two new terminals – one on the Atlantic side and one on the Pacific – connected by an LPG pipeline. Unlike existing port operations managed outside its jurisdiction (e.g., CK Hutchison), the Canal itself would own the facilities, likely operated under third-party concessions.<sup>16</sup>
- The move comes amid heightened US–China tensions, with President Trump warning of Chinese influence and Panama reaffirming its sovereignty. It reflects Panama’s ambition to modernise its port infrastructure with advanced technology and logistics, positioning itself as a competitive alternative to regional hubs like Colombia’s Port of Cartagena.

##### 2. Fire hits Maersk ship off Liberia:

- On August 13, 2025, a fire broke out aboard the ultra-large Maersk container ship *Marie Maersk* (19 076 TEU capacity) while sailing off the coast of Liberia, prompting the crew to activate onboard firefighting systems and divert the vessel toward the West African coast with assistance from tugs, while Maersk confirmed that all crew are safe and the ship remains stable.<sup>17</sup>

<sup>16</sup> McDonald, M. 12/08/2025. [Panama Canal to Enter Ports Business as Trump-China Feud Simmers](#).

<sup>17</sup> Ajdin, A. 14/08/2025. [Fire hits Maersk ship off Liberia](#).

- b. External firefighting support has since arrived, the blaze is contained though not yet fully extinguished, and the vessel is being evaluated for diversion to a suitable port of refuge – cargo impact remains undetermined.

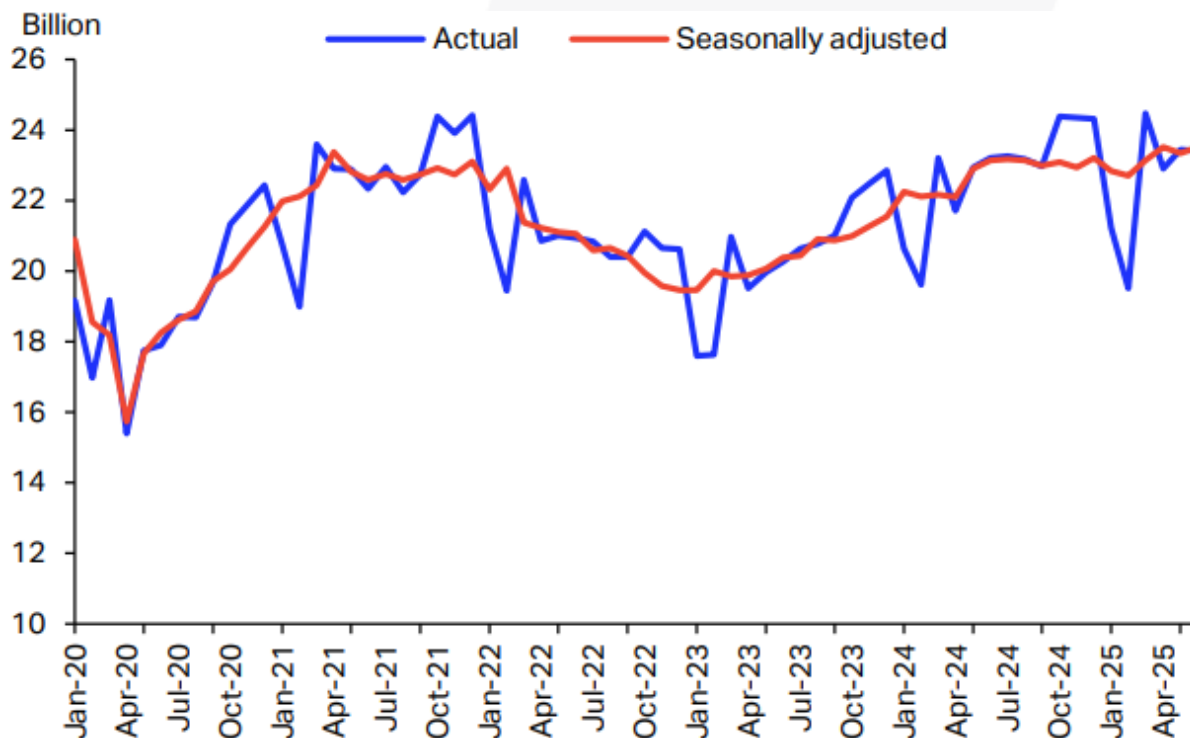
### 3. Tanker hit in Russian drone strike on Izmail port:

- a. A Panama-flagged chemical/oil-products tanker – the 7 842 dwt *Excellion* – moored at Izmail's eastern pier in Ukraine's port was severely damaged in a Russian drone strike that also targeted key port infrastructure including an oil depot, using up to 20 UAVs and causing at least 30 explosions over 90 minutes.<sup>18</sup>
- b. The vessel suffered extensive damage to its starboard superstructure, fire and blast effects disabled onboard systems and pumping gear, and plans are now being considered to tow it out or decommission it.

### c. Global air cargo industry

In June 2025, global air cargo demand (CTK) increased by **↑0,8%** year-on-year, reflecting the cargo market's uncertainty amid the trade war. Seasonally adjusted CTKs show a stronger result, expanding by **↑1,6%** (m/m). International CTK rose by **↑1,6%** (y/y), with most regions and routes posting single-digit gains. Africa's carriers saw a significant **↑3,9%** (y/y) rise – increasing by **↑6,8%** from last month. Global available cargo space, measured in available cargo tonne-kilometres (ACTK), expanded by **↑1,7%** (y/y), as the jet fuel price dropped by **↓12%** (y/y), marking the fourth consecutive annual decline. Yields continued to soften, as uncertainty remains in the sector.

Figure 20 – Industry CTKs (billions)



Source: [IATA](http://IATA)

<sup>18</sup> Ajdin, A. 20/08/2025. [Tanker hit in Russian drone strike on Izmail port.](#)

In the high-frequency metrics from World ACD, global airfreight tonnage is down by another **↓2%** (w/w), after the drop of **↓1%** last week. Regionally, only Africa (**↑3%**) and Central & South America (**↑1%**) showed growth, whereas volume contracted out of North America (**↓5%**), the Middle East and South Asia (**↓4%**) and Europe (**↓3%**). Tonnage from the Asia Pacific was unchanged. Global carrying capacity was primarily unchanged, while overall global prices rose by **↑1%**.

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

Origin Regions last 2 to 5 weeks				Capacity <sup>1</sup>			Chargeable weight <sup>1</sup>			Rate <sup>1</sup>		
WORLD ACD				Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa					-0%	+6%		-1%	-2%		+1%	+7%
Asia Pacific					+1%	+6%		-2%	+7%		+1%	-3%
C. & S. America					+1%	+2%		-1%	+6%		-0%	-2%
Europe					+0%	+6%		+1%	+1%		+2%	+6%
M. East & S. Asia					-0%	+3%		-1%	+0%		-2%	-14%
North America					-1%	+8%		-5%	+2%		+2%	-0%
Worldwide					-0%	+5%		-1%	+4%		+1%	-1%

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

Spot rate changes over the past two weeks were driven primarily by a rebalancing of Chinese exports, with renewed demand to the USA amid tariff finalisation lifting China–US volumes and rates (nevertheless, spot rates from China to the USA are still **↓11%** lower than a year ago), while Europe-bound flows remained weaker and more stable. Regional disparities also shaped outcomes, with Taiwan showing substantial gains, South Korea experiencing consecutive declines, and most other Asian origins recording mild decreases, leaving overall rates still below last year's levels. Ultimately, rates are holding firm thanks to capacity management; however, the downward trend in demand could trigger a drop in prices soon.<sup>19</sup>

ENDS<sup>20</sup>

<sup>19</sup> Goldstone, C. 15/08/2025. [Air freight rates hold steady but demand growth is on the decline.](#)

<sup>20</sup> **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.*