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Cargo Movement Update #251[1]

Date: 14 September 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)	43 932	50 050	**93 982**	48 187	54 899	**103 086**	↓9%
Air Cargo (tons)	4 507	3 015	**7 522**	5 035	2 748	**7 782**	↓3%

Monthly Snapshot

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

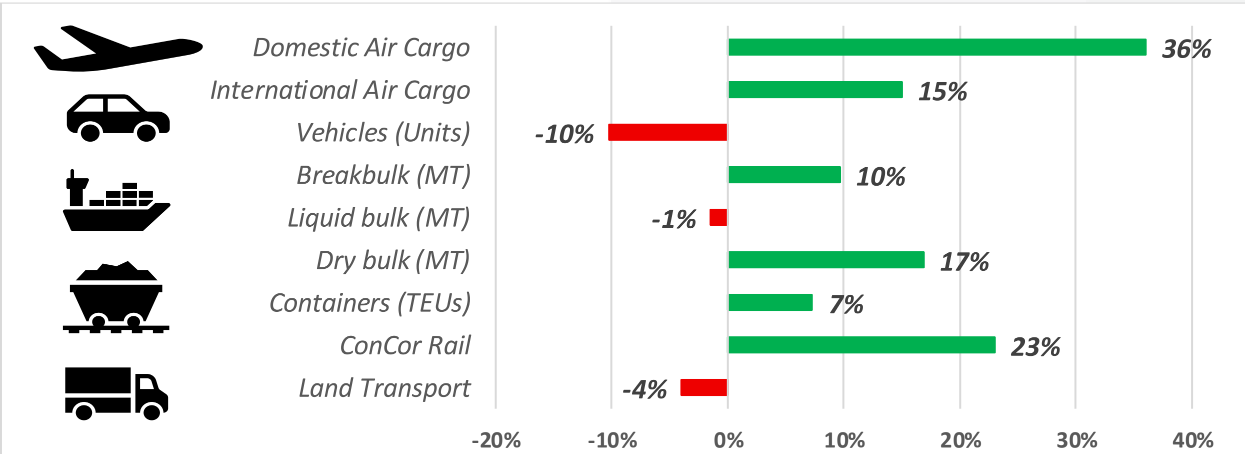
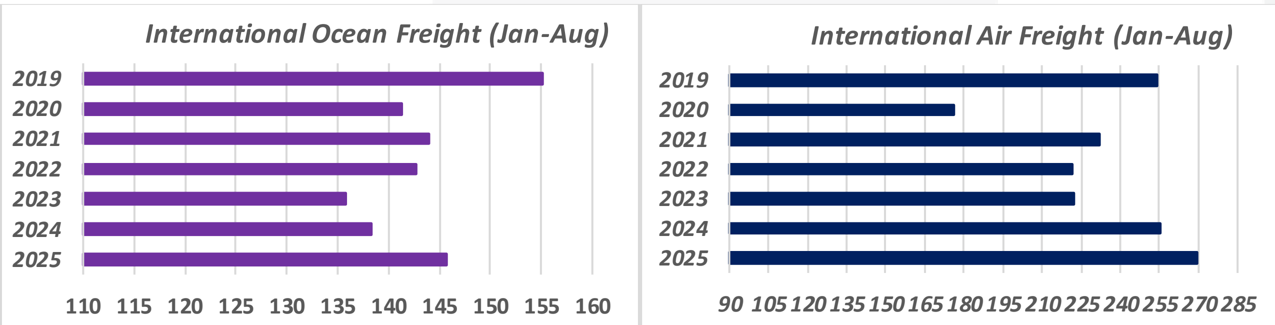


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~13 426 TEUs** was handled per day, with **~12 026 TEUs** projected for next week.
- TNPA July: containers are down by **↓6%** (m/m), but up by **↑7%** (y/y). Total bulk: **↑5%** (m/m) & **↑6%** (y/y).
- Rail cargo handled out of Durban was reported at **3 097** containers, up by ↑12% from last week.
- Cross-border queue: **↑0,8 hrs**; transit: **↑0,8 hrs**; SA borders: **~12,1 hrs** (**↑17%**); SADC: **~6,4 hrs** (**↑12%**).
- Global spot rates declined by another **↓3%** (or **$80**) to **$2 044/40ft**. Rates remain down by **↓51%** (y/y).
- Global air cargo demand grew **↑3,4%** year-on-year in H1 2025, as rates remained stable.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *251th* 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: August vs August .
[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 **13 426 TEUs** was handled daily, a decrease from **14 727 TEUs** the previous week.

Decreased throughput could partly be attributed to the fact that port operations were troubled by inclement weather and equipment challenges. Adverse weather and equipment challenges proved to be the main operational constraints in Cape Town, while a power failure, equipment breakdowns, as well as dredging and sounding operations prevented optimal operational performance in Durban. Inclement weather ensured operational delays at our Eastern Cape Ports; however, minimal delays were reported at the Port of Richards Bay this week. After earlier reports that the Maersk Cap Carmel would omit the Port of PE, her call has been reinstated. The same reports suggest that the CMA CGM Mekong 536N will omit her Port Louis East Bound call. The latest reports from TFR suggest that cable theft delayed operations on the Central Corridor, near Pretoria, this week. Additionally, the line between City Deep and Mafikeng is currently experiencing severe delays of 3-5 days due to a shortage of diesel locomotives on the line.

This week, international trade developments reflected persistent headwinds. In global shipping, demand remains weak, with spot freight rates under pressure and idle capacity rising. Container lines continue blank sailings to stabilise rates, while the USTR-301 service fees from mid-October will heavily impact Chinese carriers, notably COSCO. Drewry's World Container Index fell another **↓3%** to **$2 044** per container, down **↓51%** year-on-year, underscoring rate fragility despite a resilient charter market. Meanwhile, global airfreight shows subdued demand with Indian exporters hit by tariffs and US lane weaknesses. Overall, fragmented performance signals limited prospects for recovery heading into Q4

In August, international air cargo volumes increased month-on-month at all three major terminals (Johannesburg by **↑10%**, Cape Town by **↑14%** and Durban by **↑7%**. Year-on-year, cargo is also up at all three terminals, at **↑12%**, **↑28%**, and **↑12%**, respectively. Consequently, the year-to-date cargo is up by **↑6%** (y/y). Domestically, August volumes decreased by **↓2%** (m/m) in Johannesburg, and by **↓6%** in Durban, as Cape Town saw increased flows by about **↑3%**.

Operationally, ACSA communicated a directive addressing rising same-day slot requests, underscoring strict compliance with Civil Aviation regulations and clarifying that ad hoc slots must be submitted in IATA SSIM format via the Slot Coordinator or CDMO to avoid slot misuse and ensure safe, efficient runway capacity management.

Internationally, global air cargo markets remain volatile, shaped by tariffs, regional disruptions, and shifting trade lanes. While India–US volumes have dropped, exports from Southeast Asia and China–Europe corridors are expanding, reflecting route diversification. Overall, H1 2025 saw **↑3,4%**% growth in demand, but faster capacity expansion continues to pressure yields.

Cargo movements along the N4 corridor were stable for road transport and increased for rail transport. Truck volumes through the border post were stable at around **1 522 HGVs per day** (**no change**, w/w). Queue times decreased to an average of **4,2 hours** (**↓10%**) at the border. The average processing time also decreased to an average of **4,2 hours** (**↓9%**) per crossing. The rail to Maputo decreased to an average of **nine trains daily** (down by **one** from last week). Sugar trains from Eswatini were stable at around **one train a day**.

Land border crossing times – on average – increased slightly across the SADC region. Overall, the average queue time increased by approximately **three-quarters of an hour** from last week, while transit time increased by the same magnitude. The median border crossing times at South African borders increased by nearly **two hours**, averaging **~12,1 hrs** (**↑17%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) increased by around **three-quarters of an hour**, averaging **~6,4 hrs** (**↑12%**). This week, on average, four SADC borders took around a day to cross, namely Beitbridge, Groblersbrug, Kasumbalesa (the worst affected, taking around **two days** from the **Zambian side**), and Zobue/Mwanza OSBP. Other developments of note include **(1)** Zimbabwe – Permit Confusion at Zimra, **(2)** Zimbabwe – Anti-Smuggling Measures, **(3)** Kazungula delays, and **(4)** cargo scanning at Kasumbalesa.

In summarising this edition, cargo throughput strengthened this week, with containerised volumes leading the gains and supported by notable improvements in vessel productivity and truck turnaround times. The momentum signals not just short-term relief but also incremental progress across the logistics chain. While challenges remain, the latest data show encouraging signs of efficiency returning to critical nodes. It is a reminder that, when coordination improves and systems align, performance can shift decisively — delivering outcomes that exceed expectations.

Contents

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 8 to 14 September (measured in TEUs)

7-day flow reported (08/09/2025 – 14/09/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 436	31 052	↓12%
New Pier (Pier 1)	2 405	16 834	↑7%
Cape Town Container Terminal	1 914	13 395	↓19%
Ngqura Container Terminal	2 663	18 644	↓19%
Port Elizabeth Container Terminal	682	4 771	↓25%
Other	1 327	9 286	↑56%
Total	**13 426**	**93 982**	**↓9%**

Source: Calculated from TPT, 2025. Updated 14/09/2025.

A slightly reduced average of **~13 426 TEUs** (↓9%) was handled per day for the last week (*8 to 14 September, Table 2*). Again this week, throughput was still above the projected average of **~12 026 TEUs** (↑12% actual versus projected).

For the coming week, a decreased average of **~12 026 TEUs** (↓10%) is predicted to be handled (*8 to 14 September*, *Table 3*).

Decreased throughput could partly be attributed to the fact that port operations were troubled by inclement weather and equipment challenges.

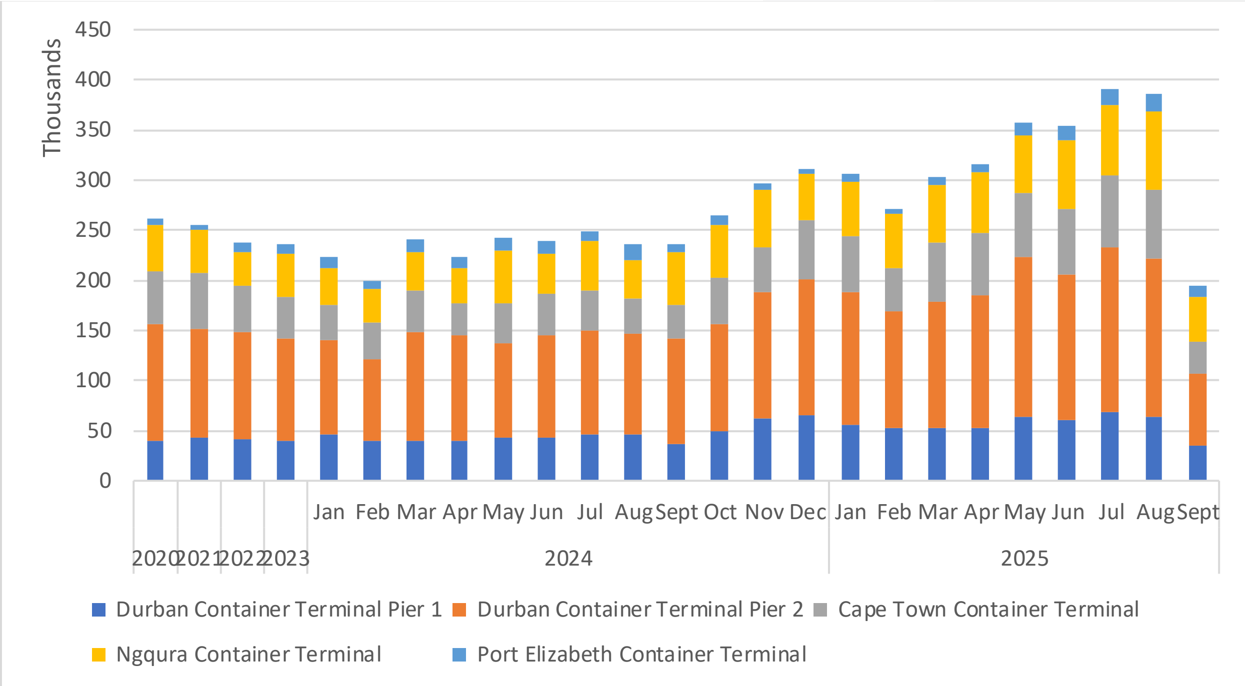
Table 3 – Container Ports – Weekly flow projected for 15 to 21 September (measured in TEUs)

7-day flow projected (15/09/2025 – 21/09/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 998	34 985	↑13%
New Pier (Pier 1)	1 916	13 409	↓20%
Cape Town Container Terminal	2 193	15 353	↑15%
Ngqura Container Terminal	1 655	11 582	↓38%
Port Elizabeth Container Terminal	391	2 736	↓43%
Other	873	6 114	↓34%
Total	**12 026**	**84 179**	**↓10%**

Source: Calculated from TPT, 2025. Updated 14/09/2025.

The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockup/down.

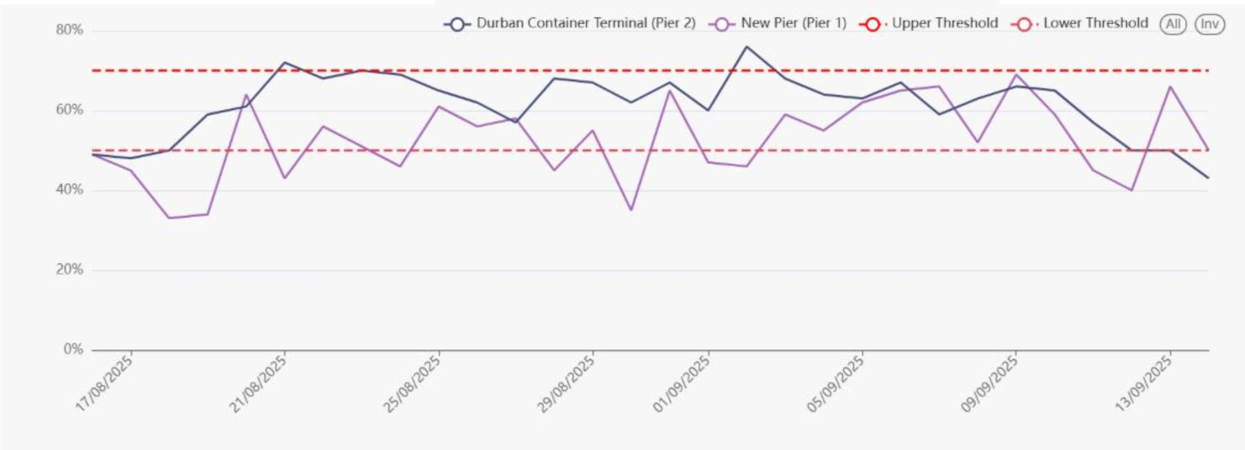
Figure 3 – Monthly flow reported for total container movement (thousands, 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 14/09/2025.

The following figure shows daily stack occupancy in both Durban terminals over the last five weeks. Despite some positive reurnts: “So, I am attaching the main changes of the new 2024/25 Second. I have already capture their form guide, as we, as the observer Formim”

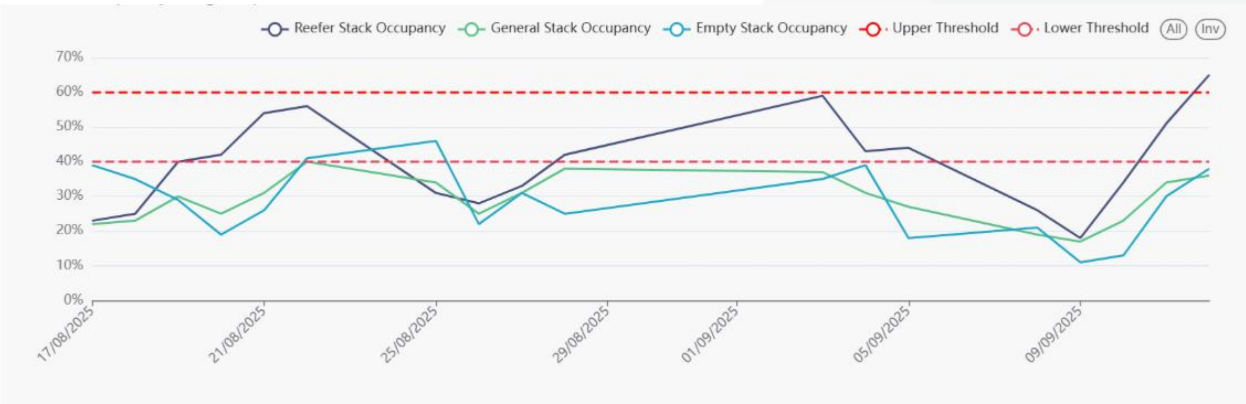
Figure 4 – Stack occupancy in DCT, general-purpose containers (17 August to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 14/09/2025.

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 (17 August to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 14/09/2025.

b. TNPA: August update

TNPA has released consolidated port statistics for August[6], with excellent throughput for all sub-sectors across the board:

- After near-record numbers in July, container throughput in August decreased slightly (by **↓6%**, m/m), but increased annually by **↑7%** (y/y).
- Total bulk cargo increased monthly by **↑5%** (m/m) and annually by **↑6%** (y/y).
- Vehicles increased monthly and yearly by **↑8%** (m/m) and annually by **↑6%** (y/y).

The following table shows the respective changes versus July:

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

	July	Aug	Movement	% change
Containers (TEUs)	**436 428**	**410 384**	**-26 044**	**-6%**
Landed	222 948	212 336	-10 612	-5%
Shipped	213 480	198 048	-15 432	-7%
Dry bulk (MT)	13 528 456	14 474 082	945 626	7%
Liquid bulk (MT)	3 090 421	2 857 081	-233 340	-8%
Breakbulk (MT)	470 204	575 405	105 201	22%
Vehicles (Units)	75 662	81 690	6 028	8%
Total cargo (excl. Vehicles)	**17 089 081**	**17 906 568**	**817 487**	**5%**

Source: TNPA, updated 14/09/2025.

Transnet Port Terminals handled **410 thousand containers** and **17,9 million metric tonnes** of **bulk** cargo during August, slightly less containers than the **436 thousand containers**, but more bulk cargoes than the **17,1 million metric tonnes** of **bulk** cargo handled last month. However, compared to yearly trends, the number of containers is up by nearly **30 thousand**, as bulk cargoes increased by more than a million tonnes, as evidenced by the following:

[6] Transnet. 2025. Port statistics.

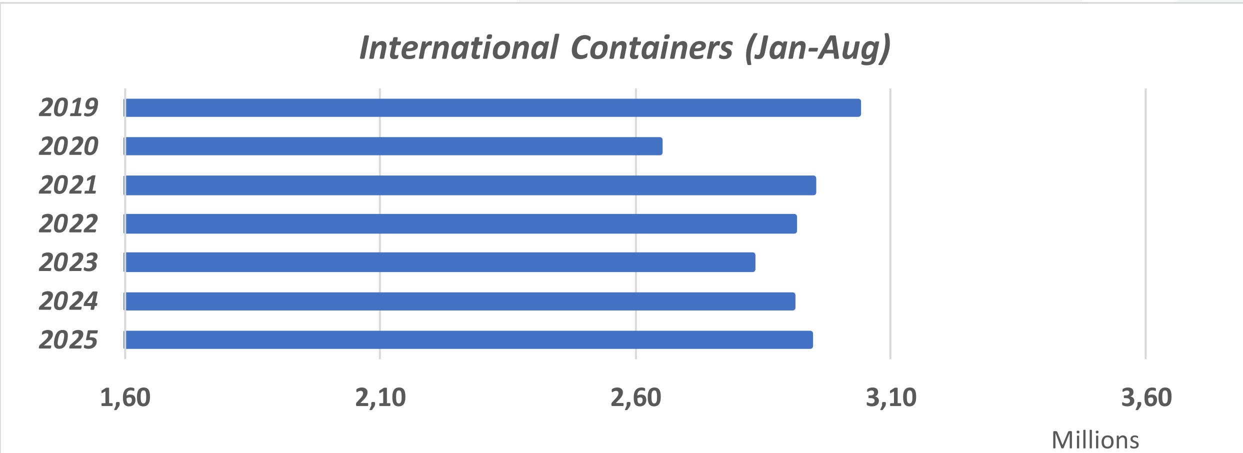
Table 5 – TNPA – Cyclical volume and growth: August 2019, 2024, and 2025

	2019	2024	2025	% '20 –'25	% '24-'25
Containers (TEUs)	**447 072**	**382 704**	**410 384**	**-8%**	**7%**
Landed	228 134	181 671	212 336	-7%	17%
Shipped	218 938	201 033	198 048	-10%	-1%
Dry bulk (MT)	14 766 987	13 198 226	14 474 082	-2%	10%
Liquid bulk (MT)	3 431 284	3 182 431	2 857 081	-17%	-10%
Breakbulk (MT)	439 036	445 670	575 405	31%	29%
Vehicles (Units)	78 742	77 278	81 690	4%	6%
Total cargo (excl. Vehicles)	**18 637 307**	**16 826 327**	**17 906 568**	**-4%**	**6%**

Source: TNPA, updated 14/09/2025.

Only liquid throughput is down annually (↓**10%**, y/y); whereas containers (↑**7%**), dry bulk (↑**10%**) and vehicle throughput (↑**6%**) have increased compared to August 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 ↑**5,3% YTD**. Moreover, with the significant improvement in container throughput for July – followed by another stellar month in August – the container YTD has improved to (↑**1,2%**), after being down by ↓**4,2%** just two months ago in June, as illustrated by the following year-to-date for containers to August:

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



Source: TNPA, updated 14/09/2025.

With another week of celebrating the launch of new equipment, the optimism is set to continue, as 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 equipment challenges proved to be the main operational constraints in Cape Town.
- A power failure, equipment breakdowns, as well as dredging and sounding operations, prevented optimal operational performance in Durban.
- Inclement weather ensured operational delays at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay this week.

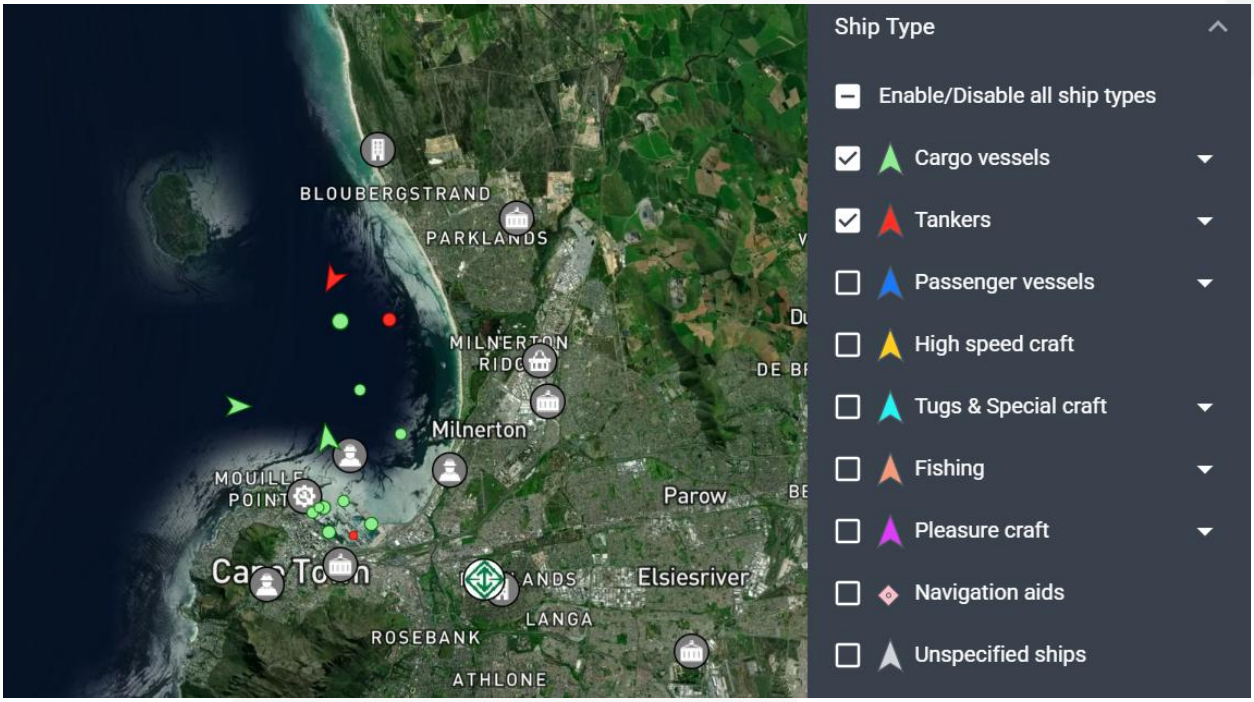
ii. Cape Town

On Friday, CTCT recorded three vessels at berth and none at anchor, as adverse weather conditions proved to be the primary operational constraint at the port. On the landside, between Monday and Friday, the terminal managed to service at least 5 777 trucks while handling approximately 196 rail units. On the waterside, the terminal executed approximately 4 353 container moves across the quay during the same period. Additionally, this week, the terminal operated between **6-9 STS cranes**, between **28 and 30 RTGs**, and around **59 hauliers**. Crane LC9 was the most notable crane absentee, with the machine expected to return to operations before the weekend.

On Friday, CTMPT had three berthed vessels, with one vessel waiting at outer anchorage. During the previous 24-hour period, the terminal managed to handle 278 container moves and 1 633 tons on the waterside, while servicing approximately 159 trucks on the landside. Stack occupancy figures were recorded at 95% for the general stack, 13% for reefers, and 0% for empties. For the most significant part of the week, the terminal operated with three cranes (with only two operational spreaders) and two straddle carriers. The technical team is currently conducting fault-finding operations on two straddle carriers, while also focusing on repairing the Crane LM600s spreader.

Between 1 and 7 September, the FPT terminal handled seven vessels: three multi-cargo, three container, and one vessel containing canola. Berth occupancy during this period was recorded at 42%. The terminal planned to handle seven more vessels between 8 and 14 September, with another six vessels scheduled between 15 and 21 September. The late arrival of cargo and the operations team's struggle to place containers into cell guides accounted for the most significant operational constraints during this period.

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



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

iii. Durban

The latest reports from Maersk suggest that the CMA CGM Mekong 536N will omit her Port Louis East Bound call. The vessel is currently berthed in Durban and will proceed directly to Tanjung Pelepas upon completion of operations. As a result, all Durban exports and transhipments will be loaded and transhipped via Tanjung Pelepas for onward carriage to Port Louis.

On Friday, Pier 1 recorded two vessels on berth, with one vessel at anchor. Between Monday and Friday, the terminal executed at least 6 000 gate moves and 295 rail moves on the landside. The **average TTT** for the week was **~65 minutes** (**no change**, w/w) and an average **staging time** of **~55 minutes** (**↑28%**). Additionally, the terminal moved over 7 100 TEUs across the quay on the waterside during the same period. The terminal had between **four and five STS cranes** and **15 and 17 RTGs** available for the most significant part of the week. Towards the end of the week, the terminal facilitated a roadshow, which impacted operational performance.

Pier 2 had three vessels on berth and three at anchorage on Friday, as equipment breakdowns, as well as dredging and sounding operations, prevented optimal operational performance this week. The terminal operated with **9 to 11 gangs** and moved over **15 700** containers across the quay between Monday and Friday on the waterside. Approximately **11 778** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~72 minutes** (**↓9%**, w/w) and an average **staging time** of **~49 minutes** (**↓35%**). Approximately 1 853 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **65** and **70** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **63%** during this period. Additionally, a power failure disrupted operations at the terminal from 12:30 on Tuesday until around 02:30 on Wednesday morning.

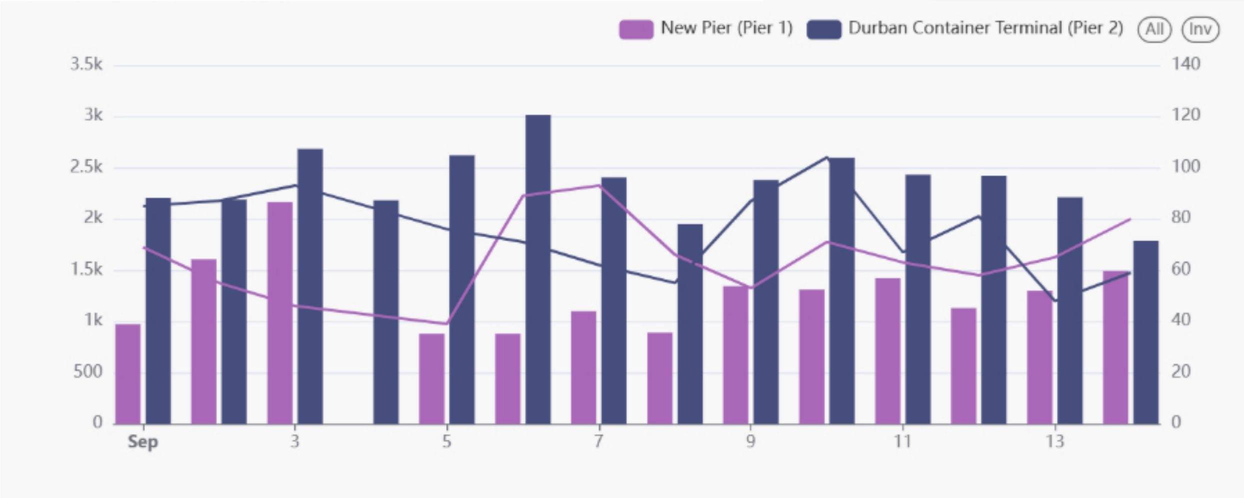
Durban's MPT terminal recorded three vessels at berth on Friday and none at outer anchorage. Stack occupancy for containers was recorded at 75% and the reefer stack at 85%, with the breakbulk stack at 5%. In the preceding 24 hours, 703 containers and 1 332 tons of breakbulk were handled on the waterside. On the landside, 506 container trucks were serviced at a TTT of ~71 minutes. Additionally, 50 breakbulk trucks, containing 877 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 towards the end of the year.

Between Monday and Tuesday, the Maydon Wharf MPT recorded zero vessels at berth and zero at anchorage. On the waterside, no volumes were handled due to no vessels being on berth, while 86 trucks and 21 rail wagons containing a combined 4 129 tons were handled on the landside. During the same period, the agri-bulk facility had one vessel at berth and zero vessels at anchor. On the waterside, the terminal managed to handle 4 036 tons, with no volumes being handled on the landside.

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 2 007 road units and 270 units on rail on the landside, while 1 941 units were handled on the waterside. Overall stack occupancy was recorded at 75%, with 10% recorded at Q&R and 70% at G-berth. During this period, the terminal had 145 high-and-heavy units (abnormal loads) on hand and managed to handle 12.

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.

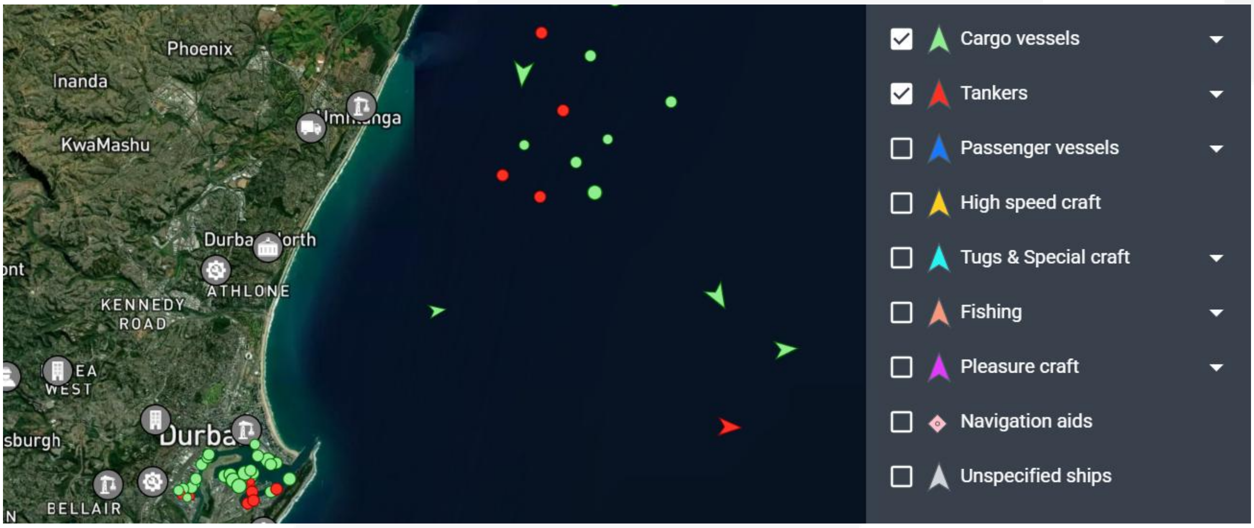
Figure 8 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 14/09/2025.

The queue of container vessels waiting outside Durban has increased slightly since last week. On Monday evening (15 September), **no** container vessel was waiting outside the anchorage at Pier 1, but **three** were waiting for Pier 2, and **three** were waiting for Point. The queue of dry (**five**), liquid (**seven**), and breakbulk (**one**) vessels has also increased slightly since last week. The following snapshot shows the current status quo:

Figure 9 – Durban vessel view (per vessel group)



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

iv. Richards Bay

On Thursday, the Port of Richards Bay had 15 vessels at anchor and 11 on the berth, translating to four vessels at DBT, one at MPT, four 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 port helicopter returned to operations in the 24 hours between Tuesday and Wednesday, after being out of commission for the most significant part of the previous week.

The daily average coal throughput for the week decreased and averaged around **142 000 tons** (**↓20%**, w/w) a day. An average of **24 trains** was serviced on the landside (up by **11** from last week), and slightly above the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded three vessels on berth and two 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 28% for reefers, 41% for reefer ground slots, and 25% for the general stack. Despite being windbound for around ten hours, the terminal handled approximately 1 380 TEUs and 208 reefers on the waterside. Approximately 421 trucks were processed on the landside at a TTT of ~32 minutes. Additionally, the terminal serviced one train at a RTT of ~1 hour. For the most significant part of the week, the terminal had 5-8 STS cranes, between 22-25 RTGs, and between 49-76 hauliers in service.

On Friday, GCT had one vessel at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 429 trucks were processed at a TTT of ~19 minutes on the landside, while 327 TEUs and 11 reefers were handled across the quay on the waterside, despite being windbound for more than 11 hours. Stack occupancy was recorded at 89% for the general stack, 68% for reefers, and 25% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and ten straddles in service.

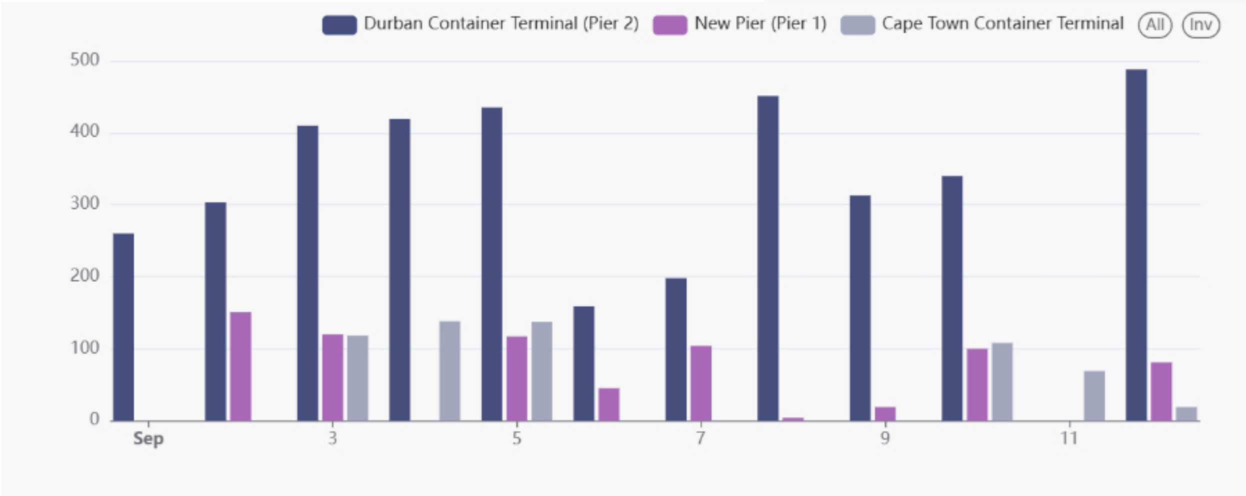
After earlier reports that the Maersk Cap Carmel would omit the Port of PE, her call has been reinstated. The vessel will thus proceed to berth at PECT around 28 September, whereafter it will proceed to Point terminal in Durban on 29 September and CTCT on 3 October.

On Monday, the Ro-Ro terminal had zero vessels on berth and zero at outer anchorage. During the preceding 24 hours, the terminal handled around 348 units on the waterside, resulting in a stack occupancy of 18%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that cable theft delayed operations on the Central Corridor, near Pretoria, this week. Additionally, the line between City Deep and Mafikeng is currently experiencing severe delays of 3-5 days due to a shortage of diesel locomotives on the line. Towards the end of the week, DCT Pier 2 had 770 ConCor units on hand with a dwell time of 24 hours and 376 over-border units with a dwell time of 71 days.

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



Source: Calculated using data from Transnet, 2024. Updated 14/09/2025.

In the last week (*8 to 14 September*), rail cargo on the ConCor line out of Durban was reported at **3 097** containers, up by a significant **↑12%** from the previous week's **2 756** containers.

vii. General

The latest reports from Maersk suggest that CTMPT, Coega, and DCT Pier 2 reported no waiting times for vessels at outer anchorage. CTCT reported 0-1 days' waiting time, PECT reported 2 days' waiting time, while Pier 1 reported 0-6 days' waiting time as road rehabilitation along Bayhead Road continues.

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 (*8 to 14 September*).[7] For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *September 2024* averaged **~938 000 kg**.

Table 6 – International inbound and outbound cargo from OR Tambo

Flows	**Daily Ave.**	**Weekly Ave.**	**Change** (w/w)
Volume inbound	**643 893**	**4 507 248**	**↓10%**
Volume outbound	**430 683**	**3 014 780**	**↑10%**
Total	**1 074 575**	**7 522 028**	**↓3%**

Courtesy of ACOC. Updated: 14/09/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA amounted to **~644 000 kg** inbound (**↓10%**, w/w) and **~431 000 kg** outbound (**↑10%**). The current levels indicate that cargo is still trending significantly above last year's level (**~↑14%**, y/y) and significantly above the comparative levels of pre-pandemic 2019 (**~↑15%**).[8]

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

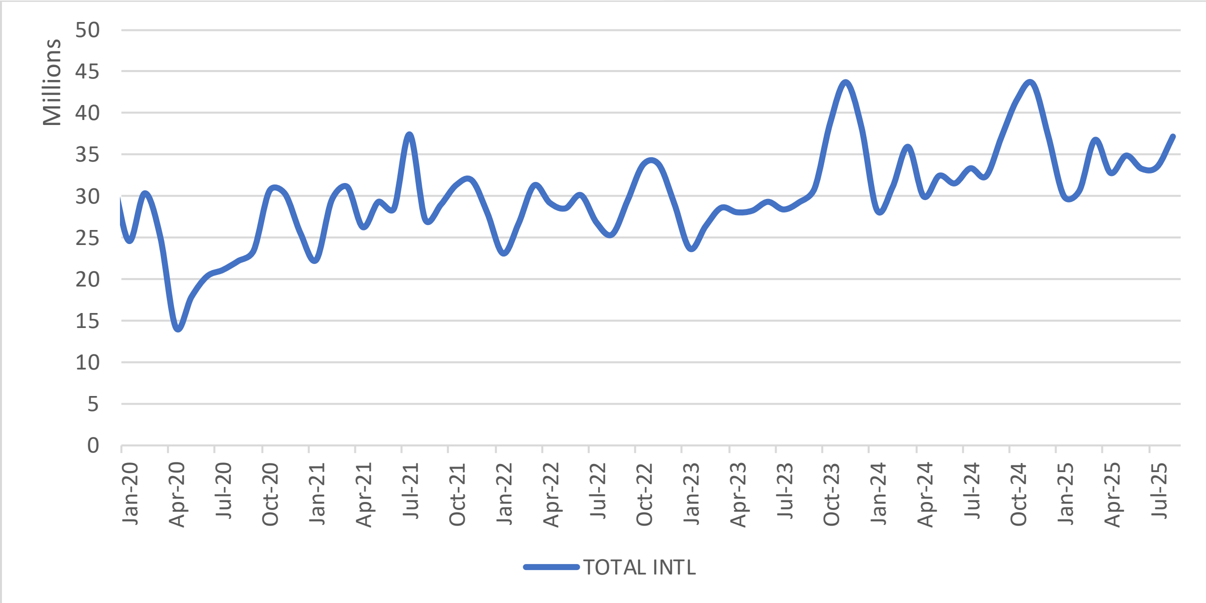
[8] Note: As mentioned last week, the international air cargo throughput figures for OR Tambo International in last week's edition were based on estimated daily averages derived from the past four weeks of data, as the latest weekly statistics were not yet available at the time of publication. The average for the week shows that the daily average of air cargo handled at ORTIA amounted to **~719 000 kg** inbound (**↑22%**, w/w) and **~393 000 kg** outbound (**↑6%**).

For the full month of August:

- Johannesburg increased by ↑**10%** (m/m) versus July and is up by ↑**12%** (y/y) versus 2024.
- Cape Town increased by ↑**14%** (m/m) and by ↑**28%** (y/y) versus 2024.
- Durban decreased by ↑**7%** (m/m), but increased by ↑**12%** (y/y) compared to 2024.
- Because of increases all around, the year-to-date cargo is up by ↑**6%** (y/y) versus 2024.

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

Figure 11 – International cargo for All Airports – volumes per month (kg millions)



Calculated from ACOC. Updated: 14/09/2025.

b. Air cargo operations

Domestic air cargo operations this week were marked by Airports Company South Africa's directive addressing rising same-day slot requests, underscoring strict compliance with Civil Aviation regulations and clarifying that ad hoc slots must be submitted in IATA SSIM format via the Slot Coordinator or CDMO to avoid slot misuse and ensure safe, efficient runway capacity management.

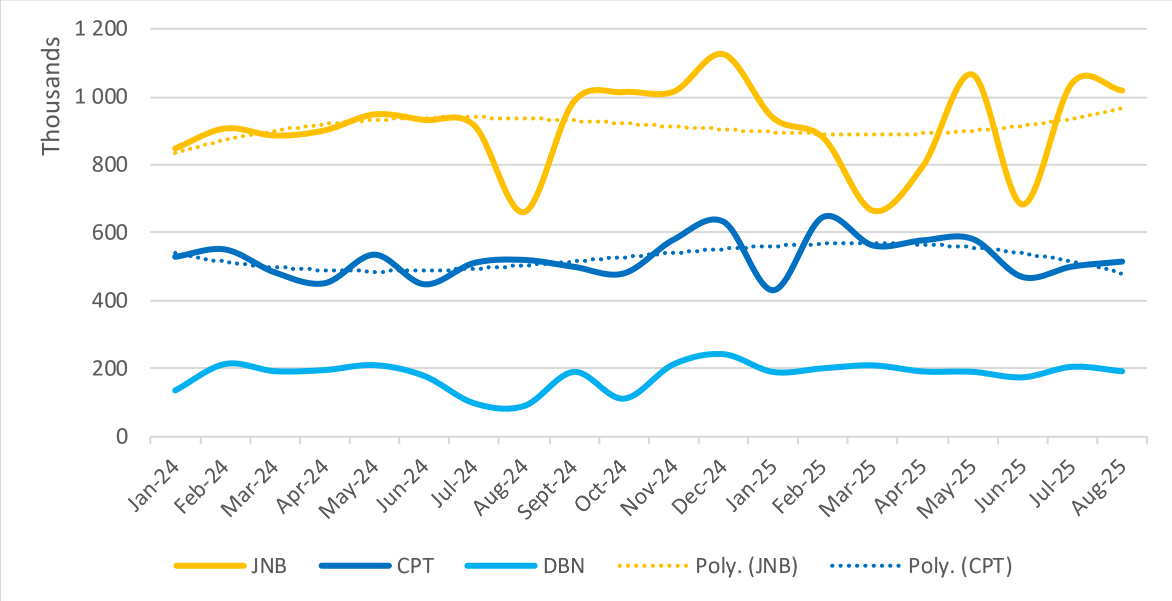
c. Domestic air cargo

For the full month of August, domestic volumes handled at our three main terminals were approximately similar to last month, but substantially more than this time last year:

- Johannesburg decreased by ↓**2%** (m/m) versus July and by ↑**54%** (y/y) versus 2024.
- Cape Town increased by ↑**3%** (m/m), but is down by ↓**1%** (y/y) versus 2024.
- Durban decreased by ↓**6%** (m/m), but is up by more than double versus this time last year (↑**113%**, y/y) versus 2024.

The following figure shows the movement since the start of last year:

Figure 12 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 14/09/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*8 to 14 September*), movements along the N4 corridor were stable for road transport and increased for rail transport. The following notes summarise the recent developments:

- Truck volumes through the border post were stable at around **1 522 HGVs per day** (**no change**, w/w).
- Queue times decreased to an average of **4,2 hours** (**↓10%**) at the border.
- The average processing time also decreased to an average of **4,2 hours** (**↓9%**) per crossing.
- The rail to Maputo decreased to an average of **nine trains daily** (down by **one** from last week).
- Sugar trains from Eswatini were stable at around **one train a day**.

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

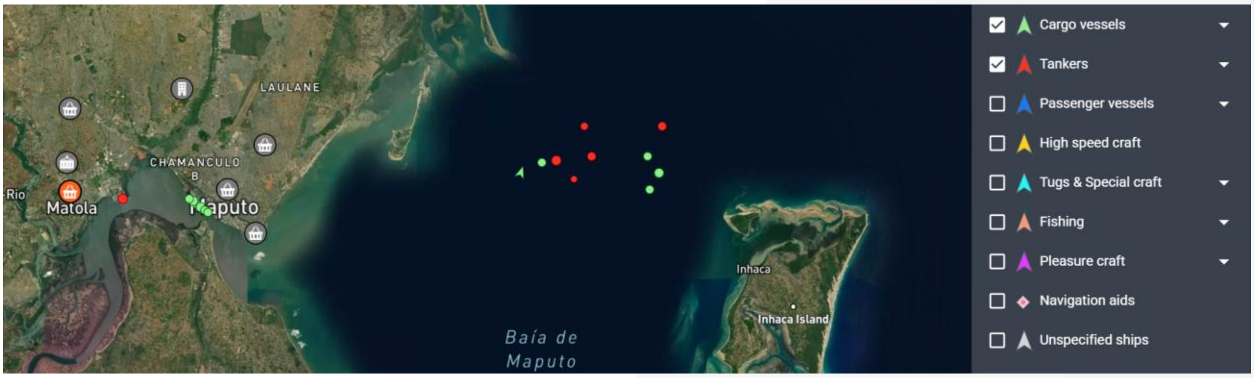
Table 7 – Lebombo border post update

	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
Design Capacity	**1 500**	**1 500**	**1 200**	**200**	**n/a**	**50**	**50**	**2 000**	**20**	**10**	**6**	**4**
Average	**1522**	**1477**	**1190**	**216**	**32**	**76**	**34**	**286**	**11**	**9**	**1**	**1**
% (w/w)	**0%**	**-1%**	**6%**	**-5%**	**-10%**	**-5%**	**-32%**	**0%**	**10%**	**-11%**	**-20%**	**0%**
% 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 14/09/2025.

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

Figure 13 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 14/09/2025 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 August:

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%**
Lebombo	30 463	**-39%**	41 463	**-14%**	**71 926**	**-26%**
Ramatlhabama	4 350	**2%**	1 884	**-20%**	**6 234**	**-6%**
Skilpadshek	8 145	**7%**	1 676	**2%**	**9 821**	**6%**

Source: TLC & FESARTA, 14/09/2025.

In total, road freight movements across these six main South African border posts are down by **↓1%** (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 **three-quarters of an hour** from last week, while transit time increased by the same magnitude.
- The median border crossing times at South African borders increased by nearly **two hours**, averaging **~12,1 hrs** (**↑17%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by around **three-quarters of an hour**, averaging **~6,4 hrs** (**↑12%**).

1. **Zimbabwe – Permit Confusion at Zimra:**
    a. A transporter was stopped at Zimra over the weekend, with officers claiming a permit was required for a pickup truck to cross.
    b. Legally, no such permit is required (only Mozambique requires one for pickups).
    c. FESARTA intervened with senior officials to resolve the issue.
2. **Zimbabwe – Anti-Smuggling Measures:**
    a. Ongoing discussions between FESARTA and the technical committee on anti-smuggling enforcement.
    b. Current practices are hampering transporters, but positive developments are expected soon.
3. **Kazungula Border Post:**

   a. ASYCUDA Online System experienced downtime on Monday evening but was restored later the same evening.
   b. Drivers reminded to declare all personal goods; a truck was fined for being overweight after the driver failed to declare 10 bags of charcoal (~500 kg).
4. **Kasumbalesa Border Post:**
   a. Officials instructed that all trucks, including abnormal loads, must undergo scanning.
   b. Drivers are being told they must pay for scanning, raising cost and compliance concerns.

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

Table 9 – Delays[9] 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	469	28,3	5,5	28,0	14 070	3 283
Beitbridge	Zimbabwe-SA	426	13,4	2,5	13,2	12 780	2 982
Groblersbrug	SA-Botswana	267	28,6	3,3	29,0	8 010	1 869
Martin's Drift	Botswana-SA	207	3,5	0,4	3,3	6 210	1 449
Kopfontein	SA-Botswana	195	9,8	2,0	9,5	5 850	1 365
Tlokweng	Botswana-SA	36	0,6	0,2	0,4	1 080	252
Vioolsdrift	SA-Namibia	30	3,9	1,3	3,6	900	210
Noordoewer	Namibia-SA	20	1,7	0,4	1,4	600	140
Nakop	SA-Namibia	30	4,1	0,3	4,1	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,4	1,1	600	140
Skilpadshek	SA-Botswana	273	6,6	2,0	6,4	8 190	1 911
Pioneer Gate	Botswana-SA	62	0,0	0,0	0,0	1 860	434
Lebombo	SA-Mozambique	1 521	4,4	1,5	4,2	45 630	10 647
Ressano Garcia	Mozambique-SA	1 471	2,1	0,3	2,0	44 130	10 297
Sum/Average		**5 027**	**7,7**	**1,4**	**7,6**	**150 810**	**35 189**

Source: TLC, FESARTA, & Crickmay, week ending 07/09/2025.

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	16,6	4,5	16,3	9 600	2 240
Central Corridor	798	1,9	0,1	1,8	23 940	5 586
Dar Es Salaam Corridor	1 819	11,5	1,2	11,4	54 570	12 733
Maputo Corridor	2 992	3,3	0,9	3,1	89 760	20 944
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 557	13,2	1,7	13,0	106 710	24 899

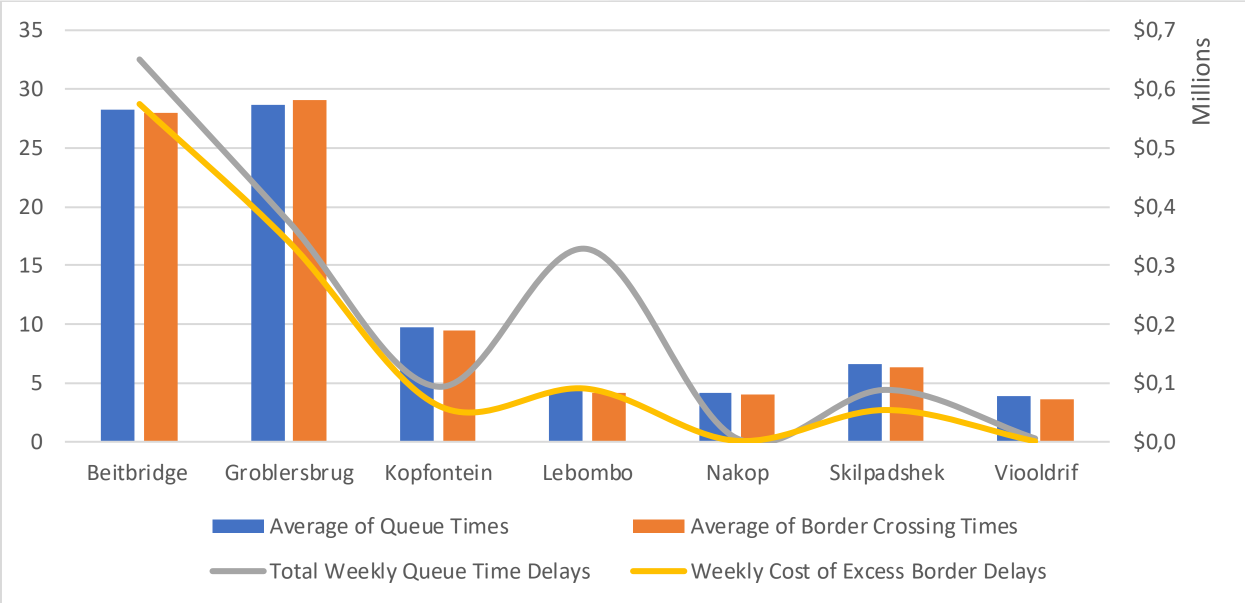
[9] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[10] Heavy Goods Vehicles. Note: These statistics are rolling averages; 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
Northern Corridor	2 817	4,3	0,5	4,1	92 520	21 588
Trans Caprivi Corridor	365	2,8	0,7	2,7	10 950	2 555
Trans Cunene Corridor	100	2,7	0,6	2,5	3 000	700
Trans Kalahari Corridor	116	19,4	2,1	19,3	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	**13 111**	**7,1**	**1,0**	**7,0**	**401 340**	**93 646**

Source: TLC, FESARTA, & Crickmay, week ending 07/09/2025.

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

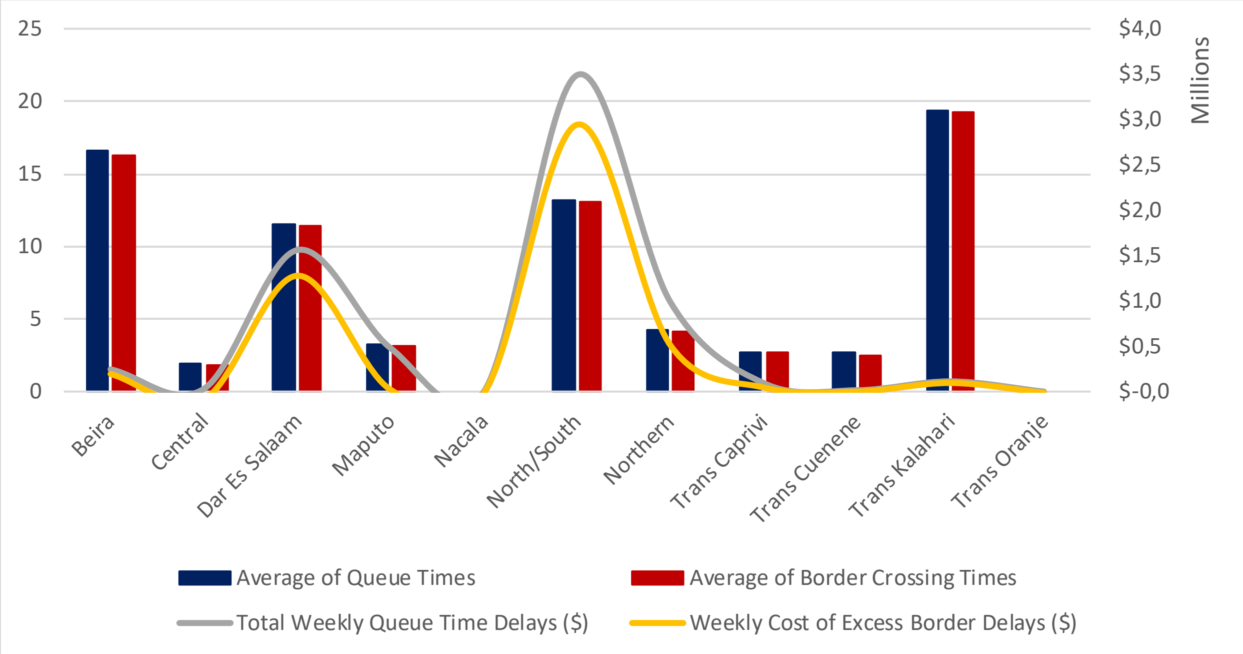
Figure 14 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 07/09/2025.

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

Figure 15 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 07/09/2025.

In summary, cross-border queue time averaged **~7,1 hours** (up by **~0,8 hours** from the previous week's **~6,3 hours**), indirectly costing the transport industry an estimated **$7 million** (**R122 million**). Furthermore, the week's average cross-border transit times also hovered around **~7 hours** (up by **~0,8 hours** from the **~6,2 hours** recorded in the previous report), at an indirect cost to the transport industry of **$5 million** (**R87 million**). As a result, the total indirect cost for the week amounts to an estimated **~$12 million** (**R210 million**, up by **↑14%** from the **~R184 million** in the previous report).

4. International Update

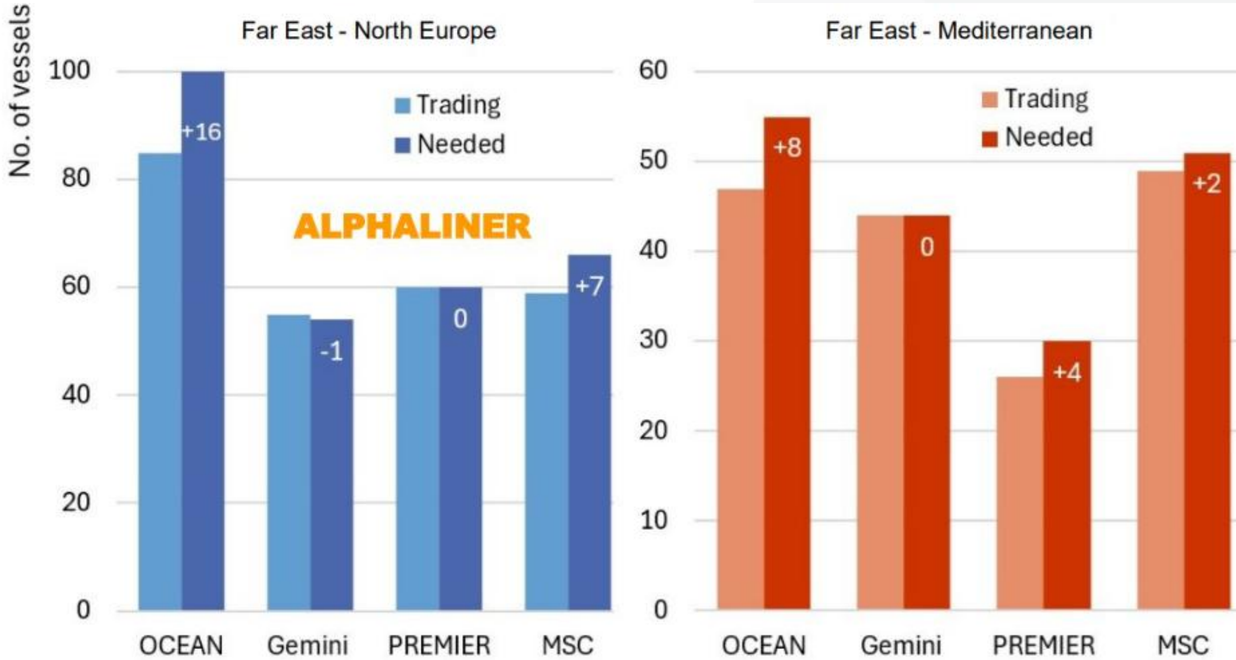
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Europe capacity and freight rates

Alphaliner reports that global container shipping demand remains weak, with spot rates still under pressure. Idle capacity is rising as carriers struggle with overcapacity and seasonal softness. Trans-Pacific and Asia-Europe trade lanes are especially affected, with rates in many services approaching breakeven or below. Carriers are increasingly deploying blank sailings and vessel withdrawals to reduce supply. Fuel costs continue to pose a challenge, limiting margin recovery.

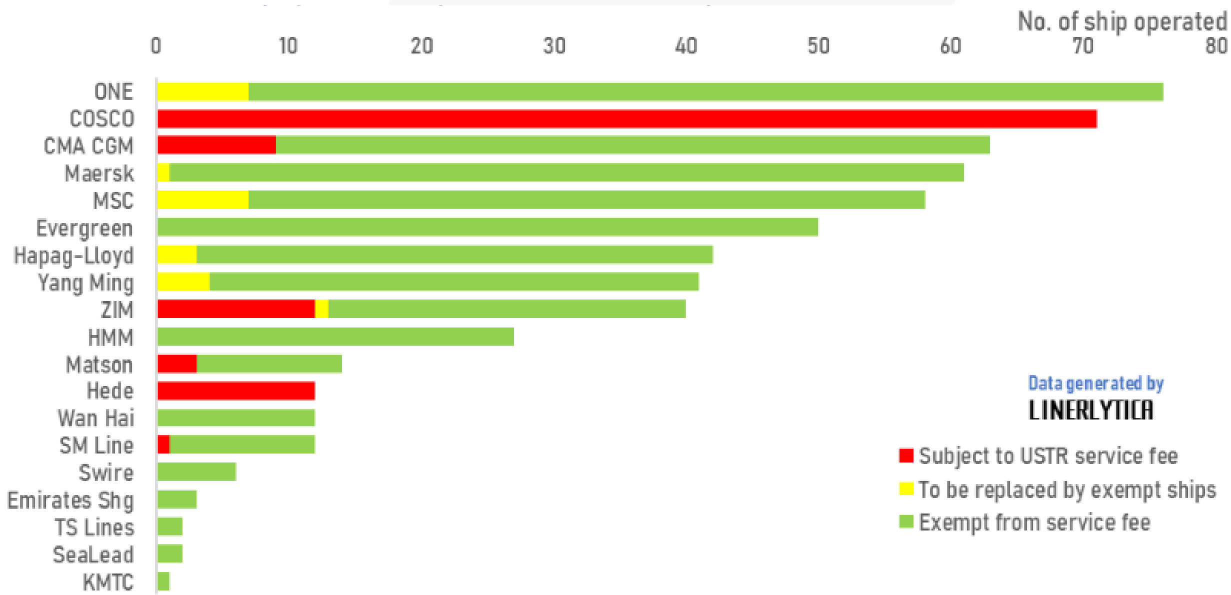
Figure 16 – Missing ships in the Far East – Europe trade



Source: Calculated from [*Alphaliner*]

Elsewhere, freight rates slid sharply last week – the SCFI dropped **↓3,2%** due to falls on China Europe, Mexico, Middle East, and India routes. Though SCFI shows gains on Transpacific, rates in US trades are weakening fast. Only **~1,5%** of US West Coast capacity was removed despite two service suspensions. The upcoming USTR-301 service fee (from 14 October) will hit Chinese carriers hardest — COSCO faces up to US$1.02 billion in fees over six months; non-Chinese carriers largely exempt, though CMA CGM and Zim face smaller but non-trivial charges.

Figure 17 – Vessels deployed on the Transpacific services (September, 2025)



Source: Calculated from [*Linerlytica*]

Container freight rates slid by about ↓**3,2%** last week, with steep losses from China to Europe, Mexico, the Middle East, and India, while even modest SCFI gains on Transpacific routes mask pronounced weakness in U.S. trade lanes. The upcoming USTR-301 service fees (from mid-October) will disproportionately impact Chinese carriers like COSCO (≈**$1,02 billion** projected over 6 months), while many non-Chinese lines are largely exempt — though CMA CGM and Zim face smaller but material exposure.

ii. Container industry summary

Carriers, led by Maersk, are intensifying their crackdown on the misdeclaration of container weights, following a spate of incidents that highlighted safety risks, and shippers now face stricter enforcement and potential penalties. In Asia–Europe trades, lines have begun announcing blank sailings around China's Golden Week, deliberately withdrawing capacity to underpin general rate increases. Meanwhile, the Premier Alliance has split one of its transatlantic services into two separate loops, a move designed to redeploy Chinese-built vessels away from US trades and thus avoid looming USTR 301 port fees.

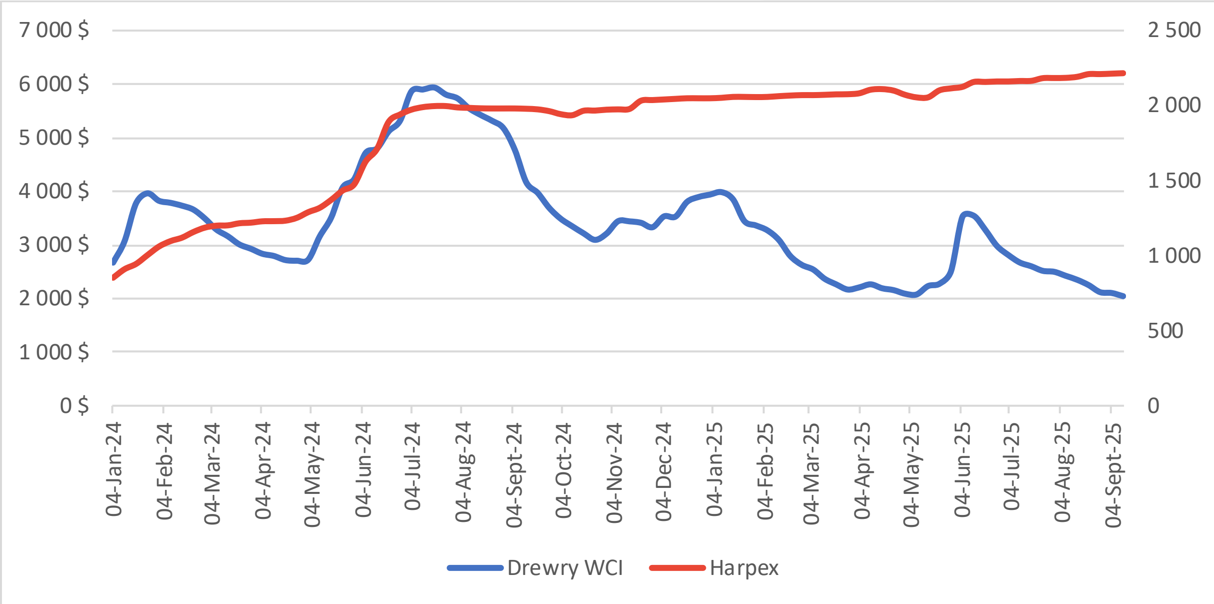
On the demand side, Indian exporters have raised concerns as airfreight volumes to the United States plummet in the wake of steep new tariffs, prompting calls for more trade agreements to support market access. More broadly, the global airfreight market is showing signs of weakness heading into the fourth quarter: short-lived spikes in rates have given way to a longer-term slump, with limited prospects for a strong peak season and growing evidence of fragmented performance across lanes.

iii. Global freight rates

Drewry's "*World Container Index*" continued to decline this week, as the index is down by another ↓**3%** (or **$80**) to **$2 044 per 40-ft container** this week.[11] Overall, rates remain down by ↓**51%** (y/y). Meanwhile, the *Harper Petersen Index* (Harpex) continues to emphasise the solidity of the charter market and remained almost unchanged this week, trading around **2 215 points** on Friday (↑**12%**, y/y).[12] The following illustrates the divergent trend of spot versus charter rates since the start of last year:

[11] Drewry. 11/09/2025. World Container Index.
[12] Harpex. 12/09/2025. Harper Petersen Index.

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



Source: Calculated from Drewry & Harpex

b. Global air cargo industry

According to high-frequency metrics from World ACD, the global air cargo market remains volatile, driven by shifting trade policies and regional disruptions. India–USA exports have dropped sharply following the imposition of **50% US tariffs** on Indian goods, though volumes to Europe rose, reflecting route diversification. Spot rates on India–USA lanes fell below **$4/kg**, **↓22%** lower year-on-year. Meanwhile, structural shifts continue: tonnage from China/Hong Kong to the USA is declining, with freighter capacity redirected toward Europe, where flows rose **↑12%** (y/y). Southeast Asian markets—Taiwan, Vietnam, and Thailand—saw strong double-digit growth in exports to the USA. Global tonnage fell **↓3%** week-on-week in early September, partly due to Labour Day in North America and typhoon disruptions in China.

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

Origin Regions last 2 to 5 weeks (WORLD ACD)	Capacity[1]			Chargeable weight[1]			Rate[1]		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-2%	+9%		+7%	+1%		+1%	+9%
Asia Pacific		+0%	+4%		+3%	+6%		-0%	-5%
C. & S. America		-0%	-1%		+3%	+5%		-1%	-4%
Europe		+1%	+5%		+0%	-0%		-0%	+0%
M. East & S. Asia		-1%	+3%		+0%	-3%		-2%	-18%
North America		-2%	-2%		-4%	-1%		+0%	-2%
Worldwide		-1%	+2%		+1%	+2%		+0%	-5%

Source: World ACD

In other aviation, global air cargo demand grew **↑3,4%** year-on-year in H1 2025, buoyed by e-commerce and tariff-driven front-loading. However, capacity – especially belly-hold – expanded faster, softening load factors and yields. Carriers face the challenge of balancing growth with overcapacity risks, as policy shifts and regional divergence add volatility to upcoming peak-season demand.

ENDS[13]

[13]**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.*