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# Cargo Movement Update #252[1]

## ***Date: 21 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)** | 38 058 | 43 359 | **81 417** | 43 932 | 50 050 | **93 982** | ↓13% |
| **Air Cargo (tons)** | 4 230 | 3 151 | **7 381** | 4 507 | 3 015 | **7 522** | ↓2% |

## Monthly Snapshot

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

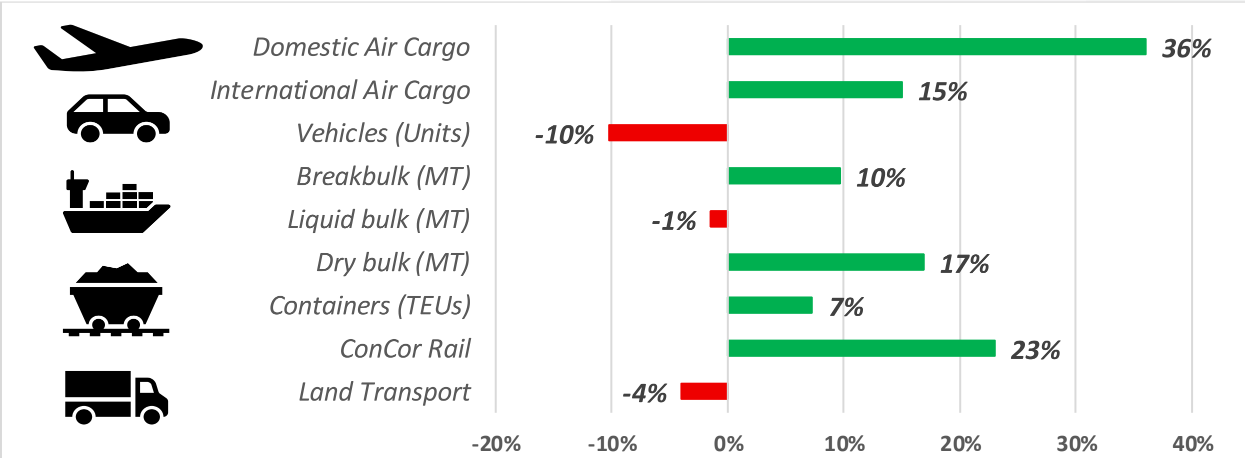
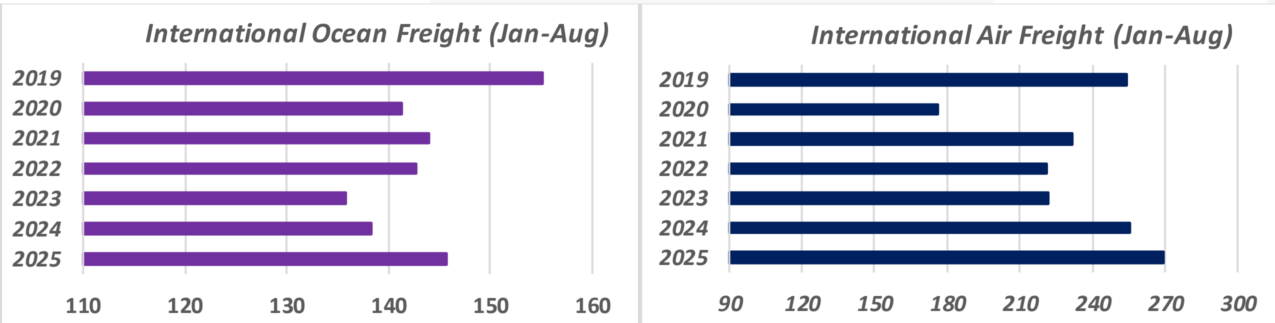



*Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)*




## Key Notes

- An average of **~11 631 TEUs** was handled per day, with **~12 026 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 579** containers, up by **↑3%** from last week.
- Cross-border queue: **↓0,1 hrs**; transit: **↓0,1 hrs**; SA borders: **~11,4 hrs** (**↓6%**); SADC: **~6,3 hrs** (**↓2%**).
- In 2024, global port throughput rebounded sharply, increasing **↑7,2%** (y/y) to **~928 million TEU**.
- Global spot rates dropped by another **↓6,4%** (**$131**) to **$1 913/40ft**. Rates remain down by **↓52%** (y/y).
- Global air cargo is up by **↑2%** (w/w) in mid-September, as Africa to Europe increased by **↑10%** (2w/2w).

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[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *252nd* 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 **11 631 TEUs** was handled daily, a significant decrease from **13 426 TEUs** the previous week.

Operational constraints this week were primarily due to inclement weather, vacant berths, and dredging and sounding operations. Adverse weather and high swells ensured operational difficulties in Cape Town, as equipment breakdowns, dredging, and congestion prevented optimal operational performance in Durban. Inclement weather, accompanied by vacant berths, disrupted operations at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. Additionally, the latest reports from TFR suggest that intermittent cable theft caused operational delays on the Central Corridor near Pretoria this week, while locomotive issues resulted in slow-moving trains on the line between City Deep and Mafikeng.

Global trade conditions remain uneven, with the current landscape marked by both resilience and pressure across transport modes. The World Bank's latest CPPI pointed to setbacks from the Red Sea crisis and Panama Canal restrictions, supported by shorter anchorage times and stronger productivity. Drewry reported a robust rebound in global terminal throughput, up **↑7,2%** (y/y) to **928 million TEU**, led by major operators and the growing influence of carrier-owned terminals. Meanwhile, Linerlytica highlighted record Chinese port volumes, though freight markets remain under strain as global container rates continue to weaken.

International air cargo lifted to and from ORTIA remained roughly the same as last week. The daily average of air cargo handled amounted to **~604 000 kg** inbound (**↓6%**, w/w) and **~450 000 kg** outbound (**↑5%**). The current levels indicate that cargo is still trending significantly above last year's level (**~↑12%**) and significantly above the comparative levels of pre-pandemic 2019 (**~↑13%**).

Operational updates this week include **(1)** ACSA revising the completion date for the Runway 03L threshold works to 30 November 2025, following extended downtime and postponements, and **(2)** IVS presenting updates on the iPAS Pre-Alert System to the ACOC plenary, highlighting its role in streamlining cargo egress and warehouse access through digitised approvals, scheduling, and validations, with future enhancements focusing on automation, performance monitoring, and mobile functionality.

Internationally, the IATA this week highlights how biomass feedstocks are key to scaling up sustainable aviation fuel (SAF). Cargo-wise, international air cargo volumes stabilised in mid-September, with worldwide tonnages up **↑2%** (w/w), though regional trends were mixed. Africa showed resilience with a **↑9%** (y/y) gain despite a slight **↓2%** dip against recent averages, while outbound flows from Africa to Europe rose **↑10%**, although rates softened in line with global declines. In other global aviation news, **(1)** FedEx announced a pivot to boost Asia-Europe capacity in response to US tariff pressures, and **(2)** European airports reported no cargo delays despite a cyber-attack on Collins Aerospace.

Cargo movements along the N4 corridor decreased for road transport and also decreased for rail transport. Truck volumes through the border post decreased to at around **1 425 HGVs per day** (**↓7%**, w/w). Queue times increased slightly to an average of **4,7 hours** (**↑7%**) at the border. The average processing time also increased slightly to an average of **4,4 hours** (**↑5%**) per crossing. The rail to Maputo decreased to an average of **eight 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 – decreased slightly across the SADC region. Overall, the average queue time decreased by approximately **ten minutes** from last week, while transit time decreased by the same magnitude. The median border crossing times at South African borders decreased by approximately **three-quarters of an hour**, averaging **~11,4 hrs** (**↓6%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased by around **ten minutes**, averaging **~6,3 hrs** (**↓2%**). This week, on average, the same four SADC borders took around a day to cross, namely Beitbridge, Groblersbrug, Kasumbalesa (the worst affected, taking nearly **three days** from the **Zambian side**), and Zobue/Mwanza OSBP. Other developments of note include **(1)** severe congestion at Groblersbrug, **(2)** several accident-related disruptions throughout the region, and **(3)** a significant fee adjustment for Zambia transit cargoes.

Finally, we acknowledge the latest World Bank CPPI results, noting improvements at Cape Town and Ngqura (Coega) and a weaker outcome for Durban.[6] The CPPI is an indicative, time-based gauge of vessel time in port; it does not capture landside performance, costs, service quality, or terminal-level variation. We will work with Transnet, the wider logistics community, and international partners to complement CPPI with multidimensional indicators and to contextualise scores using terminal handling, dwell, gate/rail, and reliability evidence. We are analysing Transnet and industry data, alongside CPPI trend material, to distil practical actions that strengthen the whole port system.

[6] WB. 22/09/2025. World Bank Container Port Performance Index 2020 to 2024: Trends and lessons learned.

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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 15 to 21 September (measured in TEUs)*

| 7-day flow reported (15/09/2025 – 21/09/2025) | | | |
|---|---|---|---|
| **Terminal** | **Daily average** | **Weekly total** | **% (w/w)** |
| **Durban Container Terminal (Pier 2)** | 5 049 | 35 345 | **↑14%** |
| **New Pier (Pier 1)** | 1 714 | 12 000 | **↓29%** |
| **Cape Town Container Terminal** | 2 281 | 15 965 | **↑19%** |
| **Ngqura Container Terminal** | 1 265 | 8 853 | **↓53%** |
| **Port Elizabeth Container Terminal** | 476 | 3 333 | **↓30%** |
| **Other** | 846 | 5 921 | **↓36%** |
| **Total** | **11 631** | **81 417** | **↓13%** |

*Source: Calculated from TPT, 2025. Updated 21/09/2025.*

A reduced average of **~11 631 TEUs** (**↓13%**) was handled per day for the last week (*15 to 21 September, Table 2*). Throughput dipped below the projected average of **~12 026 TEUs** (**↓3%** actual versus projected).

For the coming week, an increased average of **~12 026 TEUs** (**↑3%**) is predicted to be handled (*22 to 28 September*, *Table 3*).

Smooth operations were mainly constrained by inclement weather, vacant berths, and dredging and sounding operations.

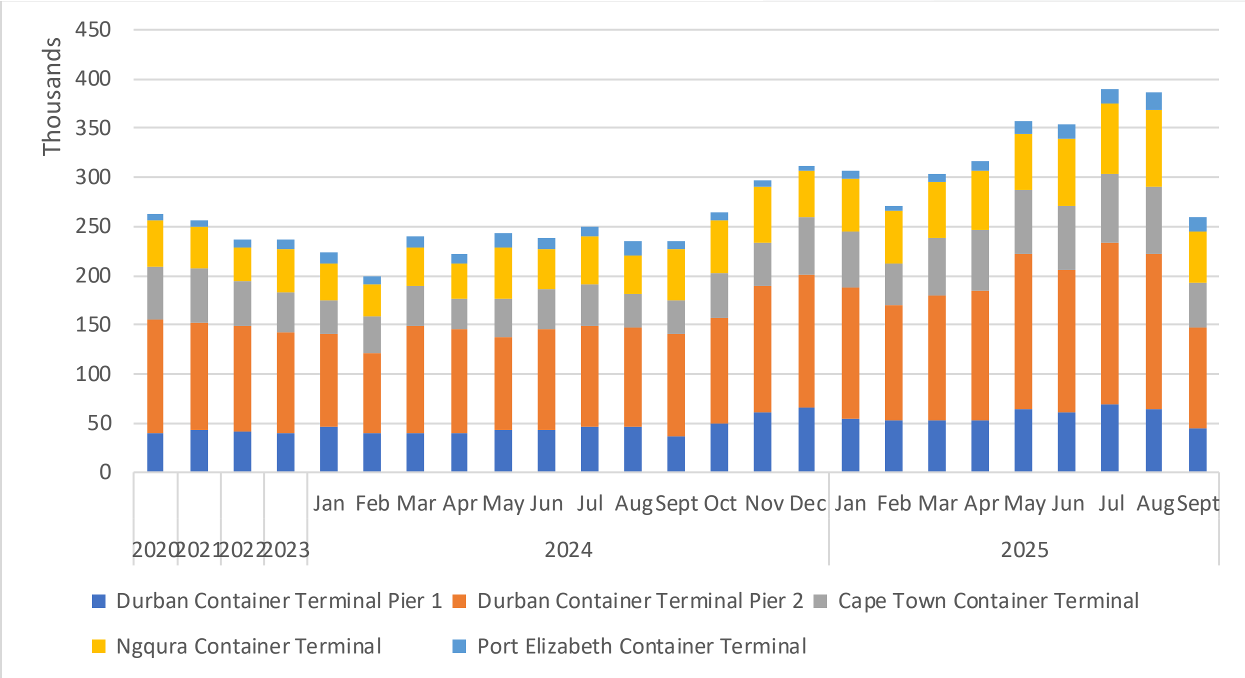
*Table 3 – Container Ports – Weekly flow projected for 22 to 28 September (measured in TEUs)*

| 7-day flow projected (22/09/2025 – 28/09/2025) | | | |
|---|---|---|---|
| **Terminal** | **Daily average** | **Weekly total** | **% (w/w)** |
| **Durban Container Terminal (Pier 2)** | 4 998 | 34 985 | **↓1%** |
| **New Pier (Pier 1)** | 1 916 | 13 409 | **↑12%** |
| **Cape Town Container Terminal** | 2 193 | 15 353 | **↓4%** |
| **Ngqura Container Terminal** | 1 655 | 11 582 | **↑31%** |
| **Port Elizabeth Container Terminal** | 391 | 2 736 | **↓18%** |
| **Other** | 873 | 6 114 | **↑3%** |
| **Total** | **12 026** | **84 179** | **↑3%** |

*Source: Calculated from TPT, 2025. Updated 21/09/2025.*

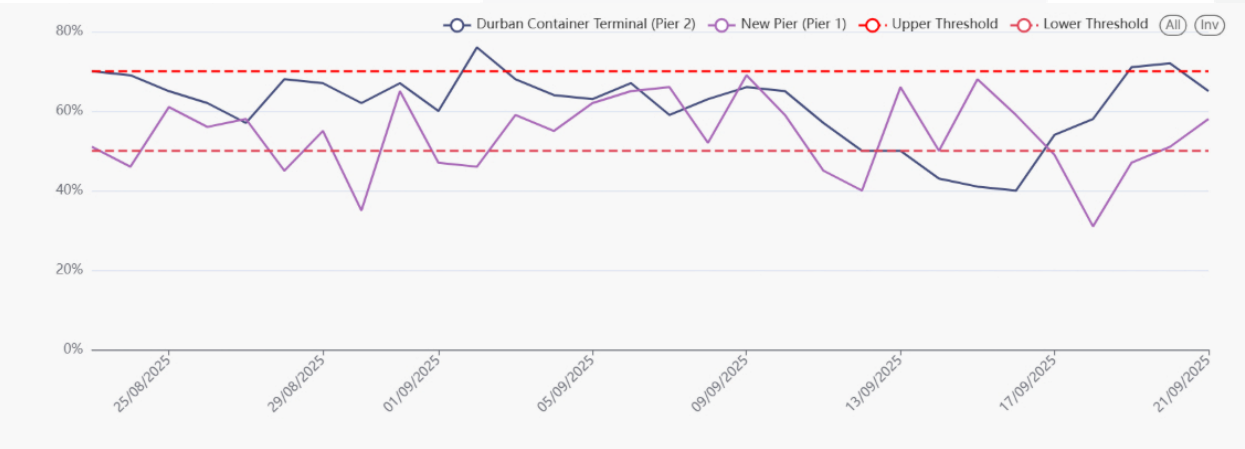
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockup/down.

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




*Source: Calculated from TPT, 2025, and updated 21/09/2025.*

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




*Source: Calculated using data from Transnet, 2025, and updated 21/09/2025.*

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 (25 August to present, day on day)*


*Source: Calculated using data from Transnet, 2025, and updated 21/09/2025.*

## b. Summary of port operations

### i. Weather and other delays

- Adverse weather and high swells ensured operational difficulties in Cape Town.
- Equipment breakdowns, dredging, and congestion prevented optimal operational performance in Durban.
- Adverse weather and underutilised berths disrupted operations at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

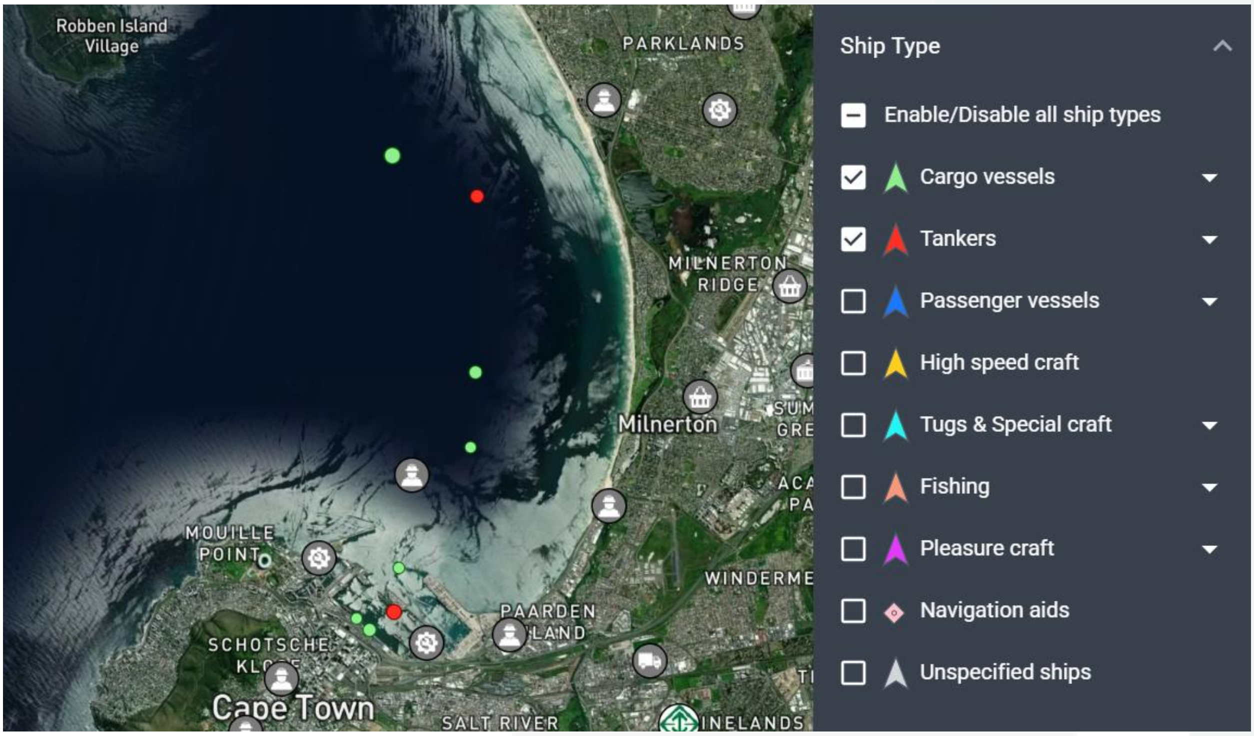
### ii. Cape Town

On Thursday, CTCT recorded three vessels at berth and none at anchor, as adverse weather conditions and high swells proved to be the primary operational constraints at the port. On the landside, between Monday and Thursday, the terminal managed to service at least 4 191 trucks while handling approximately 364 rail units. On the waterside, the terminal executed approximately 5 819 container moves across the quay during the same period. Additionally, this week, the terminal operated with **7-8 STS cranes**, **22-30 RTGs**, and approximately **59 hauliers**. Crane LC9 was the most notable crane absentee, with the machine expected to return to operations early next week.

On Thursday, CTMPT had two berthed vessels, with zero vessels waiting at outer anchorage. During the previous 24-hour period, the terminal managed to handle 7 386 tons on the waterside, while servicing approximately 80 trucks on the landside. Stack occupancy figures were recorded at 0% for the general stack, 0% for reefers, and 0% for empties, as no container vessels were handled. For the majority of the week, the terminal operated with three cranes (only two of which were 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 8 and 14 September, the FPT terminal handled six vessels: two multi-cargo, one container, one layby vessel, and two vessels containing canola and fruit. Berth occupancy during this period was recorded at 43%. The terminal planned to handle five more vessels between 15 and 21 September, with another six vessels scheduled between 22 and 28 September. The late arrival of cargo and transporters was the most significant operational constraint during this period.

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




*Source: Marine Traffic. Updated 21/09/2025 at 14:00.*

### iii. Durban

The latest reports from Maersk suggest that the MSC CARMEN 538N will phase out of service and will be replaced by MSC WEST V 538N in Durban. As a result, the MSC CARMEN 538N will only discharge imports, with all exports being loaded on the MSC West V. Thus, the vessel's tentative schedule is as follows: Durban Point terminal – 07 October, Port Elizabeth Container Terminal – 10 October, and Cape Town Container Terminal – 15 October. The MSC WEST V will load exports with the following tentative schedule: Durban Point terminal – 25 September, Port Elizabeth Container Terminal – 23 September, and Cape Town Container Terminal – 25 September. All Exports planned for MSC CARMEN 538N will be moved to reflect the MSC WEST V 538N.

On Thursday, Pier 1 recorded one vessel on berth, with three vessels at anchor. Between Monday and Thursday, the terminal executed at least 5 600 gate moves and 473 rail moves on the landside. The **average TTT** for the week was **~61 minutes** (**↓6%**, w/w) and an average **staging time** of **~42 minutes** (**↓24%**). Additionally, the terminal moved over 5 400 TEUs across the quay on the waterside during the same period. The terminal had between **three and five STS cranes** and **14 and 16 RTGs** available for the most significant part of the week.

Pier 2 had three vessels on berth and one at anchorage on Thursday, 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 **11 400** containers across the quay between Monday and Thursday on the waterside. Approximately **9 190** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~76 minutes** (**↑6%**, w/w) and an average **staging time** of **~81 minutes** (**↑65%**). Approximately 1 536 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **66** and **73** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **64%** during this period. Additionally, another power failure disrupted operations at the terminal between Monday and Tuesday.

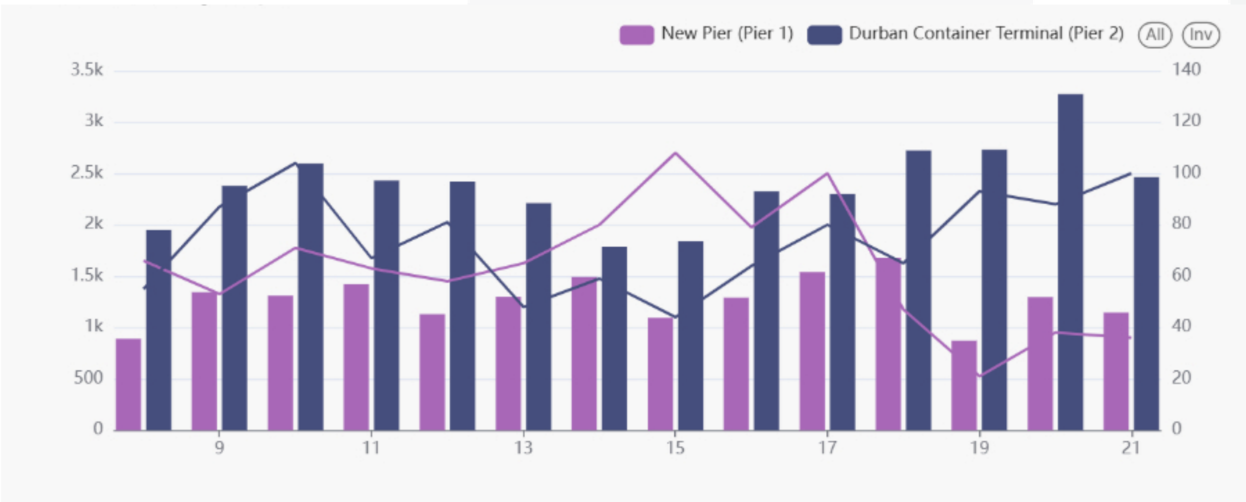
Durban's MPT terminal recorded three vessels at berth on Thursday and none at outer anchorage. Stack occupancy for containers was recorded at 34% and the reefer stack at 3%, with the breakbulk stack at 35%. In the preceding 24 hours, 544 containers and 4 660 tons of breakbulk were handled on the waterside. On the landside, 385 container trucks were serviced at a TTT of ~28 minutes. Additionally, 68 breakbulk trucks, containing 1 640 tons, were serviced. During this period, two cranes, nine reach stackers, seven forklifts, and 19 ERFs were in operation. The third crane (Crane 01) went out of commission this week due to a spreader cable being replaced and is anticipated to return over the weekend.

Between Wednesday and Thursday, 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 62 trucks and 25 rail wagons were handled on the landside. During the same period, the agri-bulk facility had zero vessels at berth or anchor.

On Thursday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with one at anchorage. In the preceding 24 hours, the terminal handled 1 874 road units and 150 units on rail on the landside, while 1 187 units were handled on the waterside. Overall stack occupancy was recorded at 64%, with 50% recorded at Q&R and 70% at G-berth. During this period, the terminal had 170 high-and-heavy units (abnormal loads) on hand and managed to handle 38.

The following figure summarises the performance of Durban's container terminals for the last two weeks, focusing on gate moves and time spent in the terminals.

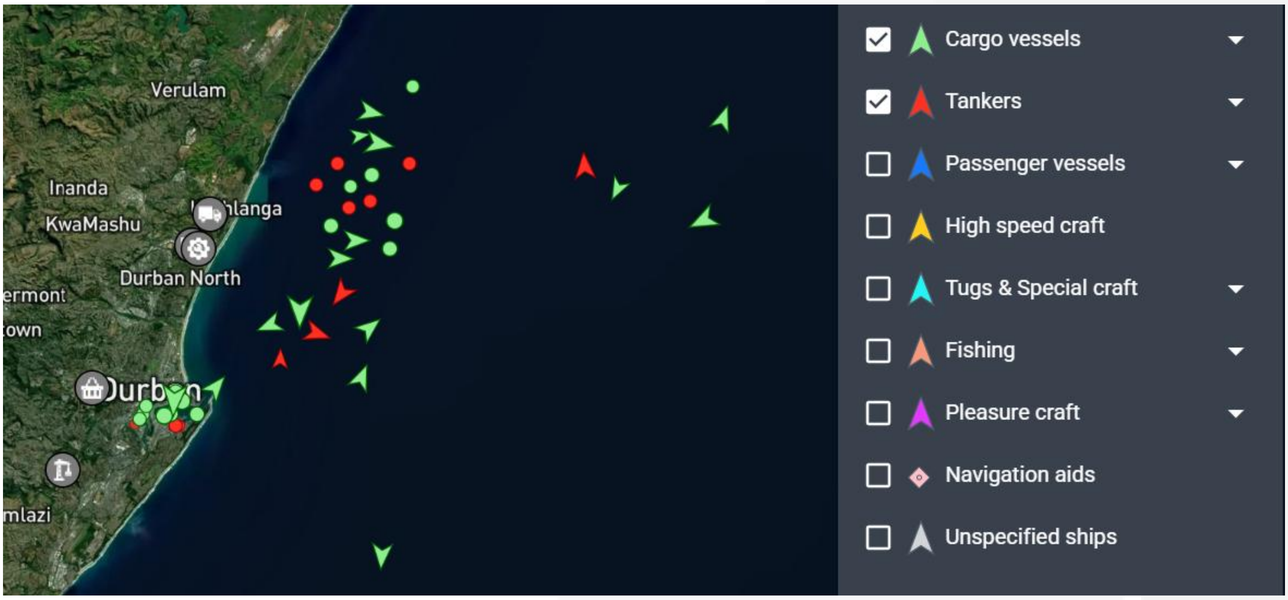
*Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)*




*Source: Calculated using data from Transnet, 2024, and updated 21/09/2025.*

The queue of container vessels waiting outside Durban has increased since last week, especially at DCT Pier 2. On Monday evening (21 September), **one** container vessel was waiting outside at anchorage for Pier 1, **seven** for Pier 2, and **none** for Point. The queue of dry (**three**), liquid (**five**), and breakbulk (**six**) vessels has also remained relatively stable since last week. The following snapshot shows the current status quo:

*Figure 8 – Durban vessel view (per vessel group)*




*Source: Marine Traffic. Updated 21/09/2025 at 14:00.*

### iv. Richards Bay

On Monday (22 September), the Port of Richards Bay had 16 vessels at anchor and 11 on the berth, translating to five vessels at DBT, three at MPT, three at RBCT, and none 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 daily average coal throughput for the week increased and averaged around **159 000 tons** (**↑12%**, w/w) a day. An average of **22 trains** was serviced on the landside (down by **two** from last week), and right on the target of 22.

### v. Eastern Cape ports

On Thursday, NCT recorded two vessels on berth and zero 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 majority of the week, the Ports of PE and Coega shared a pilot boat due to some challenges with their waterside equipment. Stack occupancy figures were recorded at 24% for reefers, 48% for reefer ground slots, and 29% for the general stack. There were instances this week where the berths were not fully occupied. Moreover, despite experiencing high swells, the terminal handled approximately 422 TEUs and 52 reefers on the waterside. Approximately 827 trucks were processed on the landside at a TTT of ~29 minutes. For the most significant part of the week, the terminal had 5-7 STS cranes, between 23-26 RTGs, and between 28-62 hauliers in service.

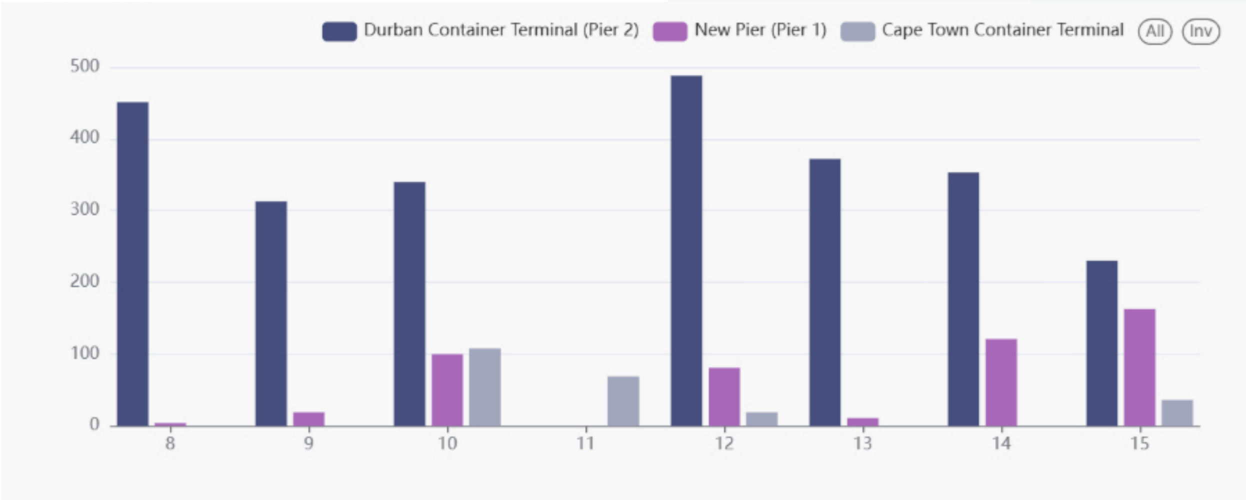
On Wednesday, GCT had one vessel at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 180 trucks were processed at a TTT of ~19 minutes on the landside, while 182 TEUs and 82 reefers were handled across the quay on the waterside, despite being windbound for more than 16 hours. Stack occupancy was recorded at 49% for the general stack, 28% for reefers, and 47% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and six straddles in service.

No volumes were handled at the Ro-Ro terminal this week.

### vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that intermittent cable theft ensured operational delays on the Central Corridor, near Pretoria, this week, while locomotive issues resulted in slow-moving trains on the line between City Deep and Mafikeng. Towards the end of the week, DCT Pier 2 had 712 ConCor units on hand with a dwell time of 36 hours and 283 over-border units with a dwell time of 52 days.

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




*Source: Calculated using data from Transnet, 2024. Updated 21/09/2025.*

In the last week (*15 to 21 September*), rail cargo on the ConCor line out of Durban was reported at **3 579** containers, up by ↑**3%** from the previous week's **3 097** containers.

## 2. Air Cargo Update

### a. International air cargo

The following table shows the inbound and outbound air cargo flows to and from ORTIA for the week (*15 to 21 September*).[7] For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *September 2024* averaged **~938 000 kg**.

*Table 4 – International inbound and outbound cargo from OR Tambo*

| Flows | Daily Ave. | Weekly Ave. | Change (w/w) |
|---|---|---|---|
| **Volume inbound** | **604 333** | **4 230 333** | **↓6%** |
| **Volume outbound** | **450 098** | **3 150 685** | **↑5%** |
| **Total** | **1 054 431** | **7 381 018** | **↓2%** |

*Courtesy of ACOC. Updated: 21/09/2025.*

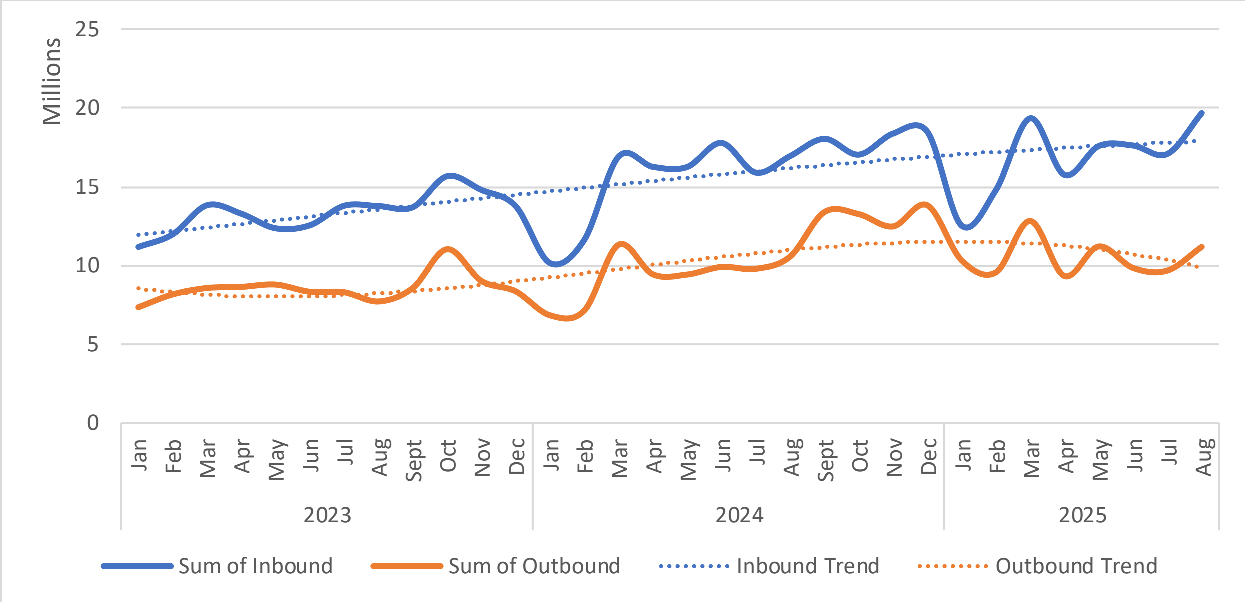
International air cargo lifted to and from ORTIA remained roughly similar to last week. The daily average of air cargo handled amounted to **~604 000 kg** inbound (**↓6%**, w/w) and **~450 000 kg** outbound (**↑5%**). The

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

current levels indicate that cargo is still trending significantly above last year's level (**~↑12%**, y/y) and significantly above the comparative levels of pre-pandemic 2019 (**~↑13%**).

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

*Figure 10 – International cargo for ORTIA – volumes per month (kg millions)*




*Calculated from ACOC. Updated: 21/09/2025.*

If the market will in any shape or form replicate last season's end, we can expect a solid increase, especially in outbound cargoes, as Q4 of the previous year increased significantly over the period in question.

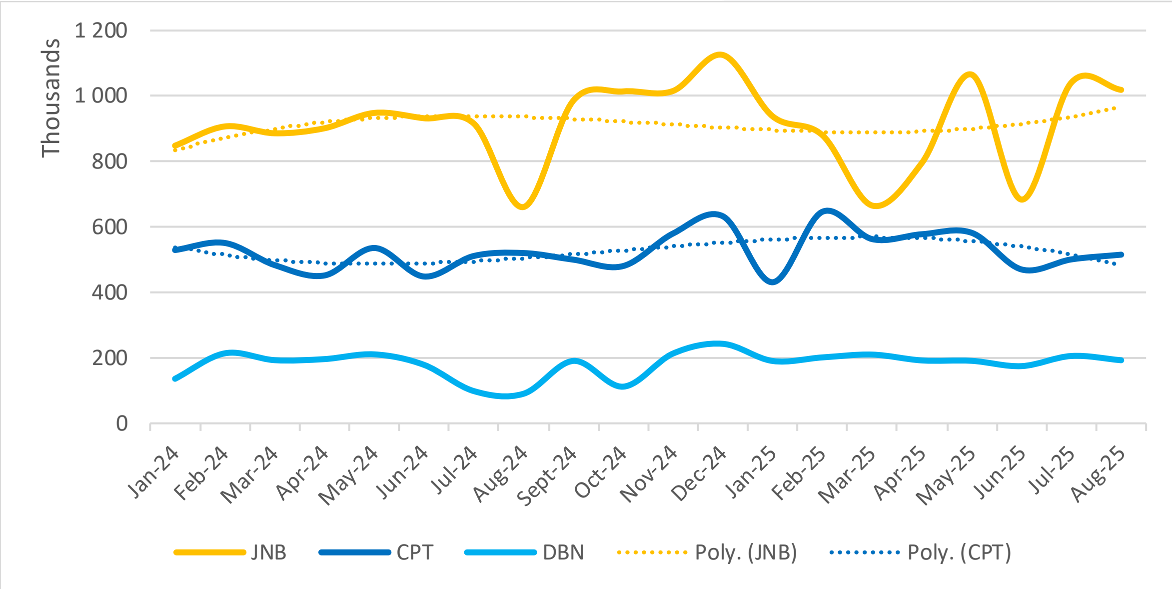
### b. Air cargo operations

Domestic air cargo operations this week revolved around ACSA and the IVS iPAS Pre-Alert System. Firstly, ACSA has revised the completion date for the Runway 03L threshold works, now expected by **30 November 2025**, following extended downtime and postponements. Secondly, in a presentation to the ACOC plenary last week, updates were provided on the IVS iPAS Pre-Alert System. The system aims to streamline cargo egress and warehouse access by digitising approvals, scheduling, and validations, thereby reducing congestion and improving communication across stakeholders. Key enhancements include real-time integration, standardised processes controlled by SAAFF, SAEPA, ACOC, and ACSA, with future requests focusing on automation, performance monitoring, and mobile functionality.

### c. Domestic air cargo

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

*Figure 11 – Domestic inbound and outbound cargo (thousands)*




*Courtesy of ACOC. Updated: 21/09/2025.*

## 3. Road and Regional Update

### a. Lebombo border post update

In the last week (*15 to 21 September*), movements along the N4 corridor decreased for road transport and also decreased for rail transport.

- Truck volumes through the border post decreased to at around **1 425 HGVs per day** (**↓7%**, w/w).
- Queue times increased slightly to an average of **4,7 hours** (**↑7%**) at the border.
- The average processing time also increased slightly to an average of **4,4 hours** (**↑5%**) per crossing.
- The rail to Maputo decreased to an average of **eight 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:

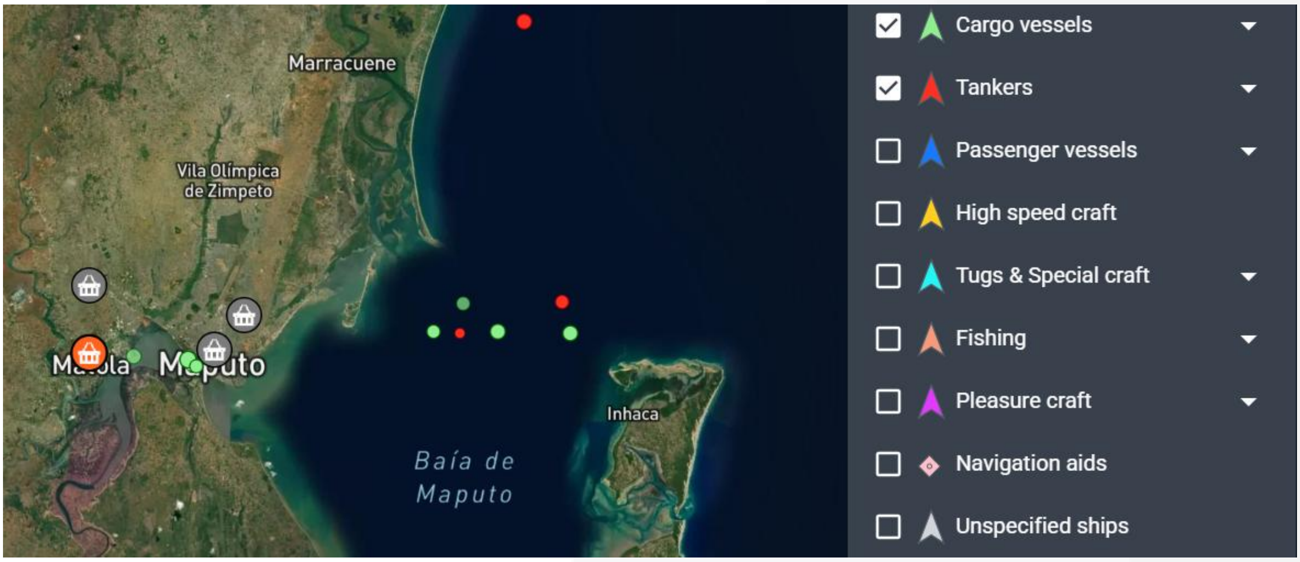
*Table 5* – Lebombo border post update

| | Trucks Entering KM4 | Trucks Exit KM4 | Mineral Trucks | General Cargo | Micro Importers | Export (full) | Fuel Tankers | Trucks staging in KM4 | Total Trains | SA to Maputo | KM4 to Maputo | Eswatini to Maputo |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Design Capacity** | **1 500** | **1 500** | **1 200** | **200** | **n/a** | **50** | **50** | **2 000** | **20** | **10** | **6** | **4** |
| Average | **1425** | **1402** | **1028** | **242** | **35** | **89** | **37** | **292** | **9** | **8** | **2** | **1** |
| % (w/w) | **-7%** | **-5%** | **-16%** | **11%** | **8%** | **14%** | **8%** | **2%** | **-19%** | **-7%** | **25%** | **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 21/09/2025.*

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

*Figure 12 – Maputo vessel view (per vessel group)*




*Source: Marine Traffic. Updated 21/09/2025 at 14:00.*

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

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

- Overall, the average queue time decreased by approximately **ten minutes** from last week, while transit time decreased by the same magnitude.
- The median border crossing times at South African borders decreased by approximately **three quarters of an hour**, averaging **~11,4 hrs** (**↓6%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased by around **ten minutes**, averaging **~6,3 hrs** (**↓2%**).

1. **Severe congestion at Groblersbrug** has become a pressing concern, with northbound transporters reporting queue times of **three days or more**.
   a. The main issue appears to be poor queue management, as *Authorised Economic Operator (AEO)* transporters with pre-cleared documentation continue to experience swift passage (which is a good advertisement for the C-2-B initiative).
   b. Carriers are particularly alarmed by the prolonged idling of fully loaded trucks along the N11, raising both security and cost implications.
   c. The situation has been compounded by **customs platform disruptions at SARS**, where operators were advised not to resubmit declarations awaiting responses.
2. **In the region, several accident-related disruptions were noted:**
   a. At **Chirundu**, a southbound truck overturned about 20 km from the Tsetse control point, temporarily obstructing traffic in both directions.
   b. In **Harare (corner of Glenara & Mutare)**, a container truck overturned onto two vehicles, causing major congestion and requiring diversions.
   c. On the **Beitbridge–Masvingo corridor near Ngundu**, authorities issued an advisory that blasting works would necessitate a midday road closure.
3. **Lastly, the Radiation Protection Authority of Zambia announced a significant fee adjustment.**
   a. Monitoring charges will now be collected **per product rather than per load**, set at **ZMK 100 for imports and exports** and **ZMK 1 300 for transits**.

b. This change is expected to raise compliance costs for regional operators, particularly those engaged in multi-product shipments.

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

*Table 6 – Delays[8] summary – South African borders[9] (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 | 24,8 | 6,5 | 25,0 | 14 070 | 3 283 |
| Beitbridge | Zimbabwe-SA | 433 | 13,1 | 2,2 | 13,1 | 12 990 | 3 031 |
| Groblersbrug | SA-Botswana | 235 | 34,2 | 2,4 | 34,0 | 7 050 | 1 645 |
| Martin's Drift | Botswana-SA | 176 | 4,2 | 0,4 | 4,1 | 5 280 | 1 232 |
| Kopfontein | SA-Botswana | 213 | 12,1 | 1,4 | 12,1 | 6 390 | 1 491 |
| Tlokweng | Botswana-SA | 25 | 0,7 | 0,2 | 0,4 | 750 | 175 |
| Vioolsdrift | SA-Namibia | 30 | 5,4 | 1,3 | 5,3 | 900 | 210 |
| Noordoewer | Namibia-SA | 20 | 2,2 | 0,5 | 2,1 | 600 | 140 |
| Nakop | SA-Namibia | 30 | 3,4 | 0,3 | 3,2 | 900 | 210 |
| Ariamsvlei | Namibia-SA | 20 | 1,0 | 0,4 | 1,0 | 600 | 140 |
| Skilpadshek | SA-Botswana | 273 | 4,4 | 1,4 | 4,2 | 8 190 | 1 911 |
| Pioneer Gate | Botswana-SA | 62 | 0,0 | 0,0 | 0,0 | 1 860 | 434 |
| Ramatlhabama | SA-Botswana | 158 | 0,4 | 0,5 | 3,1 | 1 290 | 301 |
| Ramatlhabama | Botswana-SA | 43 | 3,1 | 0,1 | 0,2 | 4 740 | 1 106 |
| Lebombo | SA-Mozambique | 1 521 | 4,7 | 1,3 | 4,4 | 45 630 | 10 647 |
| Ressano Garcia | Mozambique-SA | 1 471 | 2,7 | 0,3 | 2,4 | 44 130 | 10 297 |
| **Sum/Average** | | **5 179** | **7,3** | **1,2** | **7,2** | **155 370** | **36 253** |

*Source: TLC, FESARTA, & Crickmay, week ending 14/09/2025.*

*Table 7 – Delays summary – Corridor perspective*

| Corridor | HGV Arrivals per day | Queue Time | Border Time – Best 5% | Border Time – Median | Est. HGV Tonnage per day | Weekly HGV Arrivals |
|---|---|---|---|---|---|---|
| **Beira Corridor** | 320 | 13,1 | 3,0 | 12,9 | 9 600 | 2 240 |
| **Central Corridor** | 798 | 2,7 | 0,4 | 2,6 | 23 940 | 5 586 |
| **Dar Es Salaam Corridor** | 1 819 | 13,6 | 1,1 | 13,5 | 54 570 | 12 733 |
| **Maputo Corridor** | 2 992 | 3,7 | 0,8 | 3,4 | 89 760 | 20 944 |
| **Nacala Corridor** | 127 | 0,0 | 0,0 | 0,0 | 3 810 | 889 |
| **North/South Corridor** | 3 270 | 15,2 | 2,5 | 15,0 | 98 100 | 22 890 |
| **Northern Corridor** | 2 817 | 3,4 | 0,7 | 3,2 | 92 520 | 21 588 |
| **Trans Caprivi Corridor** | 804 | 3,1 | 0,6 | 3,0 | 24 120 | 5 628 |
| **Trans Cunene Corridor** | 100 | 3,0 | 0,6 | 2,9 | 3 000 | 700 |
| **Trans Kalahari Corridor** | 116 | 11,7 | 2,4 | 11,4 | 3 480 | 812 |
| **Trans Oranje Corridor** | 100 | 0,0 | 0,0 | 0,0 | 3 000 | 700 |

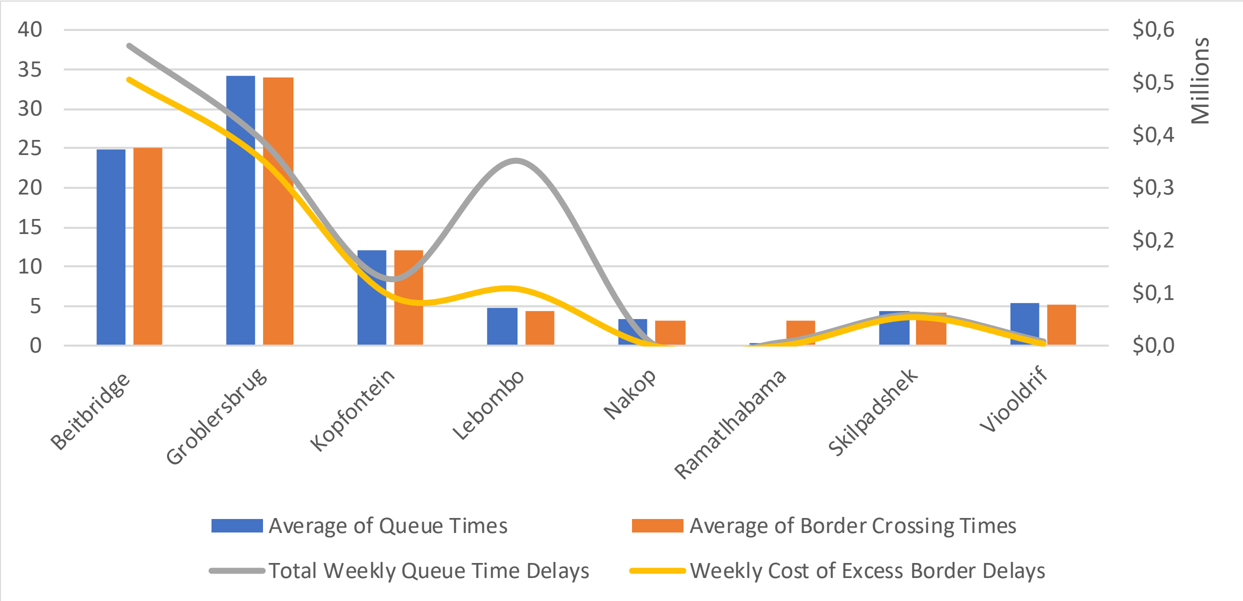
[8] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[9] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[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 |
|---|---|---|---|---|---|---|
| **Sum/Average** | **13 263** | **7,0** | **1,1** | **6,9** | **405 900** | **94 710** |

*Source: TLC, FESARTA, & Crickmay, week ending 14/09/2025.*

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

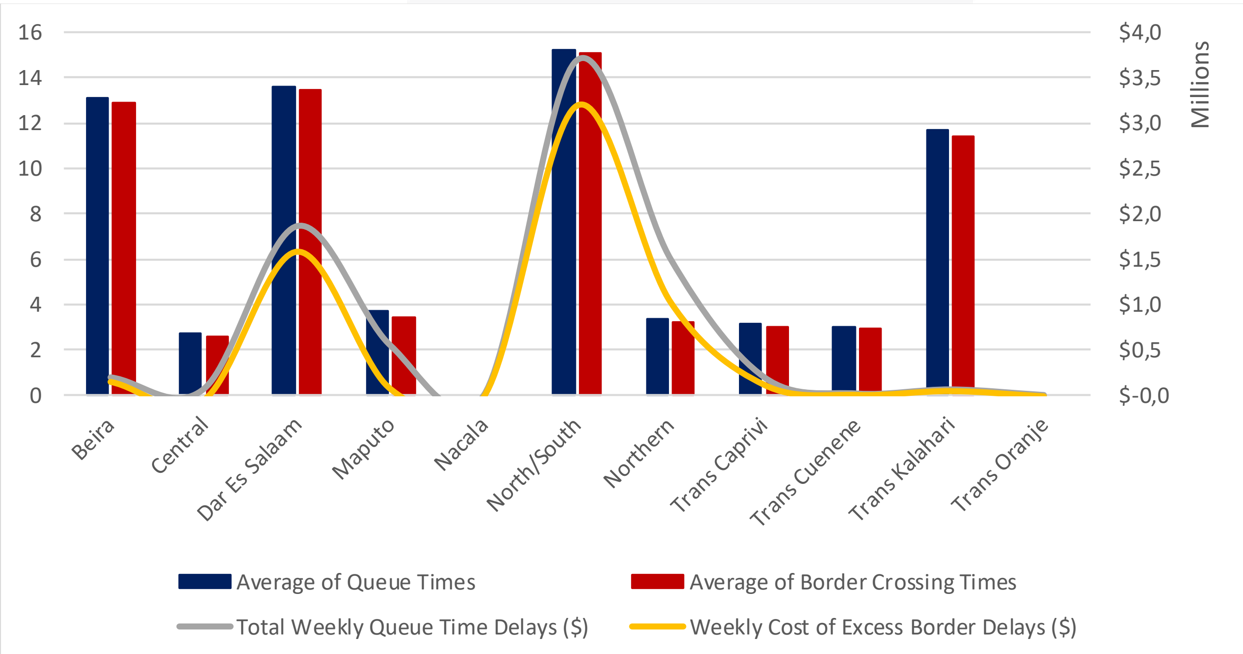
*Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)*




*Source: TLC, FESARTA, & Crickmay, week ending 14/09/2025.*

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

*Figure 14 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & $ millions)*




*Source: TLC, FESARTA, & Crickmay, week ending 14/09/2025.*

In summary, cross-border queue time averaged **~7,0 hours** (down by **~0,1 hours** from the previous week's **~7,1 hours**), indirectly costing the transport industry an estimated **$8,1 million** (**R141 million**). Furthermore, the week's average cross-border transit times also hovered around **~6,9 hours** (also down by **~0,1 hours** from the **~7 hours** recorded in the previous report), at an indirect cost to the transport industry of **$6,1 million** (**R105 million**). As a result, the total indirect cost for the week amounts to an estimated **~$14,2 million** (**R247 million**, up by **↑18%** from the **~R210 million** in the previous report), as more congested border posts increased disproportionately compared to the less congested border posts.

## 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.

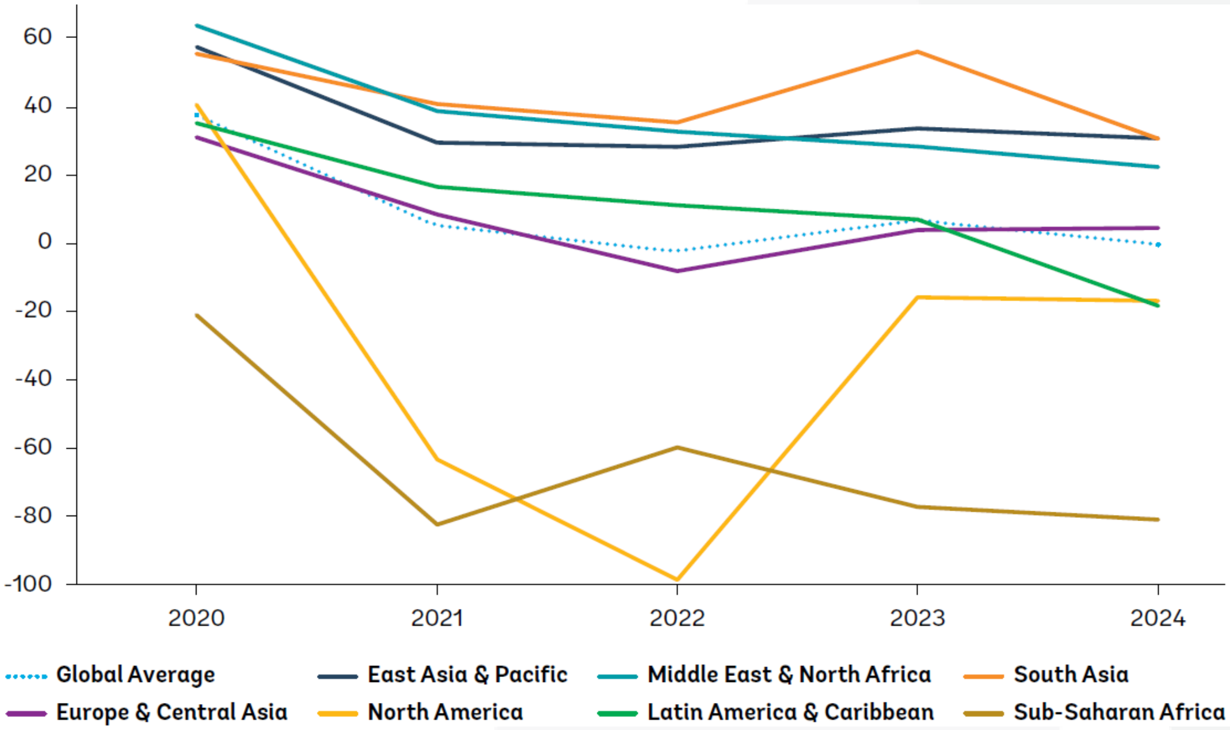
### a. Global shipping industry

#### i. World Bank: CPPI Index for 2024

On Tuesday, the World Bank released its latest iteration of the Container Port Performance Index, titled "*The Container Port Performance Index 2020 to 2024: Trends and Lessons Learned*".[11] The CPPI provides a comparable, time-based assessment of container port performance centred on vessel time in port (arrival/waiting plus berth hours), normalised for ship and call size and produced by aggregating an administrative and a statistical approach. Across 2020–2024, the index shows a sharp deterioration in 2021–2022 during global congestion, a strong rebound in 2023 as schedules stabilised, and a partial setback in 2024 linked to the Red Sea crisis and Panama Canal constraints. Performance patterns vary markedly by region, as illustrated:

[11] WB. 22/09/2025. World Bank Container Port Performance Index 2020 to 2024: Trends and lessons learned.

*Figure 15 – CPPI averages by World Bank region (2020 to 2024)*




*Source:* [World Bank]

For South African ports, the World Bank attributes South Africa's outcomes primarily to **longer arrival/waiting times at anchor**, with **time at berth broadly unchanged** between 2023 and 2024. Within this context, **Cape Town** and **Ngqura (Coega)** were among the world's largest improvers, while **Durban** recorded a weaker result. Early-2025 operational indicators cited alongside the report point to improvement: **anchorage time down ~↓75%**, **gross crane moves up ~↑13%**, and **ship-working moves up ~↑25%**, suggesting benefits from operational interventions even as arrival dynamics dominate CPPI scores. These nuances are important when interpreting South African ports' rankings and in translating CPPI signals into targeted actions. We are analysing Transnet and industry data, alongside CPPI trend material, to distil practical actions that strengthen the whole port system

### ii. Global terminal operators and port throughput

Drewry's latest "*Global Container Terminal Operator Annual Review*" shows that, in 2024, global port throughput rebounded sharply, increasing approximately **↑7,2%** year-on-year to about **928 million TEU**.[12] The 19 global terminal operators (GTOs) covered by Drewry slightly surpassed the industry average, with equity-adjusted volumes rising around **7,7%**, boosting their combined market share to approximately **49,2%**. PSA International maintained its top position, posting **67,2 million TEU** (around **↑7,3%** growth). A notable trend is the rise of "hybrid" operators (carrier-owned terminals such as MSC's TiL, CMA CGM's terminals, Hapag-Lloyd's units), which are expanding aggressively through mergers and acquisitions to secure volume, integrate networks, and gain better control over gateway capacity. Projected growth in container-handling capacity in 2025 is about **↑4,8%** (roughly **64 million TEU**), the largest annual increase in absolute terms since

[12] Drewry. 22/09/2025. Strong throughput and container handling capacity growth for global terminal operators.

the global financial crisis, driven by both acquisitions and greenfield investments, especially in emerging markets. The following table shows the top seven GTOs for the year:

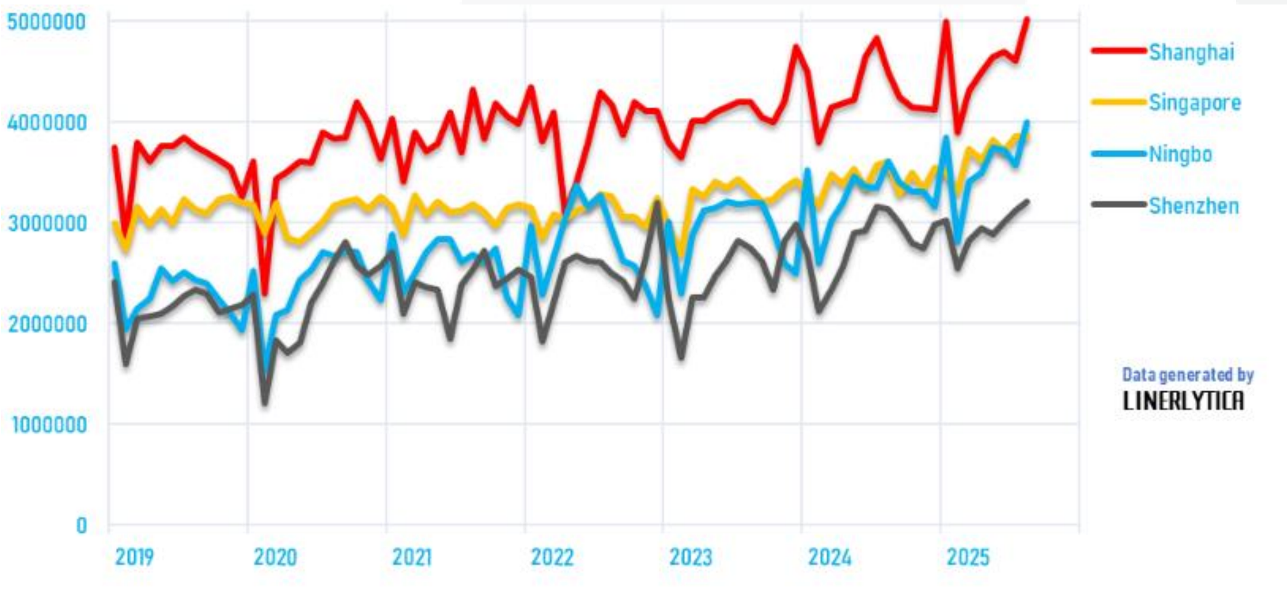
*Table 8 – Global terminal operators' equity-based throughput league table (2024)*

| Ranking 2024 | Operator | Equity-adjusted throughput, 2024 (mteu) | Volume growth/decline vs. 2023 (%) | Share of global port throughput, 2024 (%) |
|---|---|---|---|---|
| 1 | PSA International | 67.3 | 7.3% | 7.2% |
| 2 | China Merchants Port | 61.2 | 8.4% | 6.6% |
| 3 | China COSCO SHIPPING | 54.2 | 0.9% | 5.8% |
| 4 | APM Terminals | 53.2 | 8.9% | 5.7% |
| 5 | Hutchison Ports | 46.2 | 7.0% | 5.0% |
| 6 | MSC Group | 44.4 | 5.2% | 4.8% |
| 7 | DP World | 44.3 | 0.0% | 4.8% |
| | **subtotal** | **370.9** | **5.5%** | **40.0%** |
| | Other GTOs | 85.5 | 18.6% | 9.2% |
| **Global/international operators total** | | **456.4** | **7.7%** | **49.2%** |

*Source:* Drewry

Concerning more recent container terminal data, Linerlytica this week noted that despite the ongoing rate declines, Chinese ports remain robust: Shanghai and Ningbo recorded record highs in August, with national volumes up by **↑5,9%** in the first seven months of 2025. Linerlytica projects global throughput growth of **↑3,2%** for the full year, as the US tariffs have failed to dampen global volume growth. Here are the top four:

*Figure 16 – Top 4 Container Ports – Monthly throughput, 2019 to August 2025 (TEUs)*

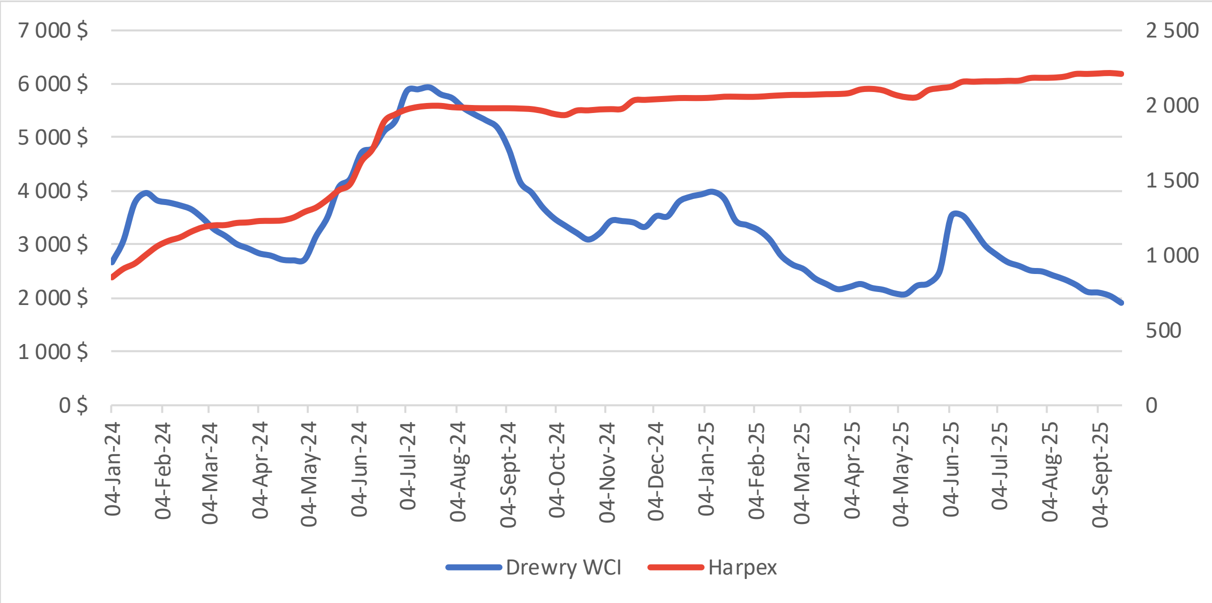



*Source:* Linerlytica

### iii. Global freight rates

Drewry's "*World Container Index*" dropped below the **$2 000-mark**, as the index went down by another **↓6,4%** (or **$131**) to **$1 913 per 40-ft container** this week.[13] Overall, rates remain down by **↓52%** (y/y). Meanwhile, the *Harper Petersen Index* (Harpex) decreased for the first time in more than four months, trading around **2 210 points** on Friday (**↓0,3%**, w/w).[14] The following illustrates the divergent trend of spot versus charter rates since the start of last year:

*Figure 17 – World Container Freight Index ($ per 40ft) & Harpex Index*




*Source: Calculated from Drewry*

## b. Global air cargo industry

IATA's "*Chart of the Week*" this week shows how biomass feedstocks are the key to scaling up sustainable aviation fuel (SAF). As illustrated below, biomass feedstock availability globally is large (over **12 000 Mt** by 2050 unconstrained). Still, after competing demands from power, heat, bioenergy, biochemicals, etc., only about **1 580 Mt** remains realistically available for SAF production – enough for **~300 Mt** bio-SAF under current conversion efficiencies:

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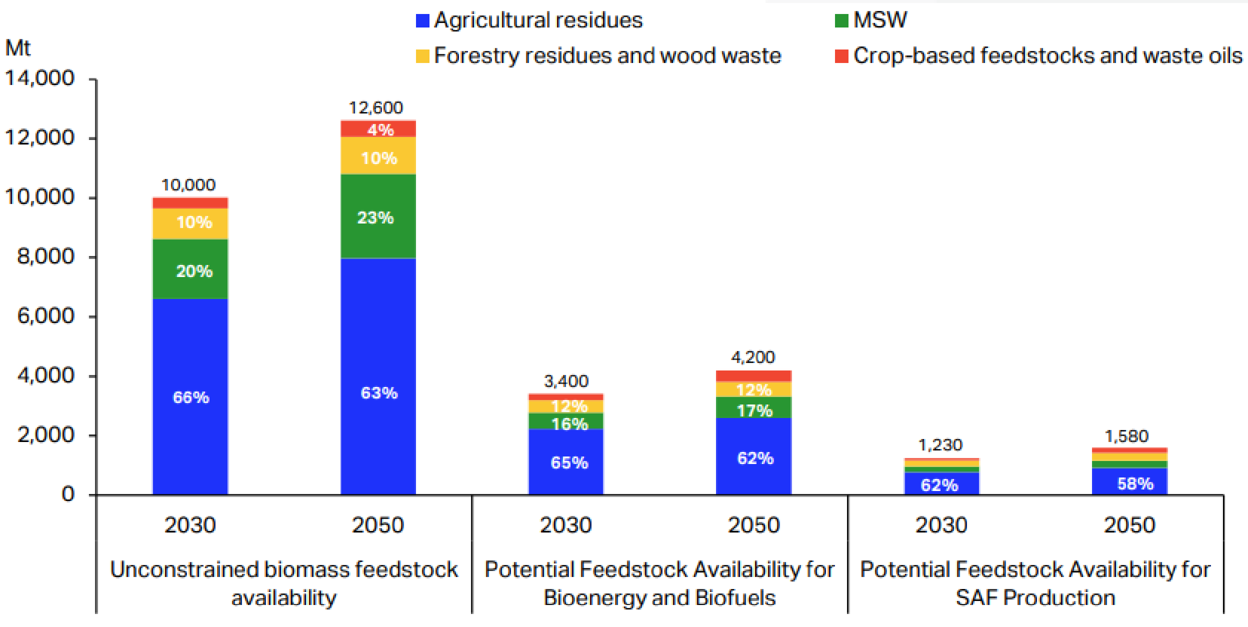
[13] Drewry. 18/09/2025. World Container Index.
[14] Harpex. 19/09/2025. Harper Petersen Index.

*Figure 18 – Potential availability of global biomass feedstocks for SAF production by 2050*

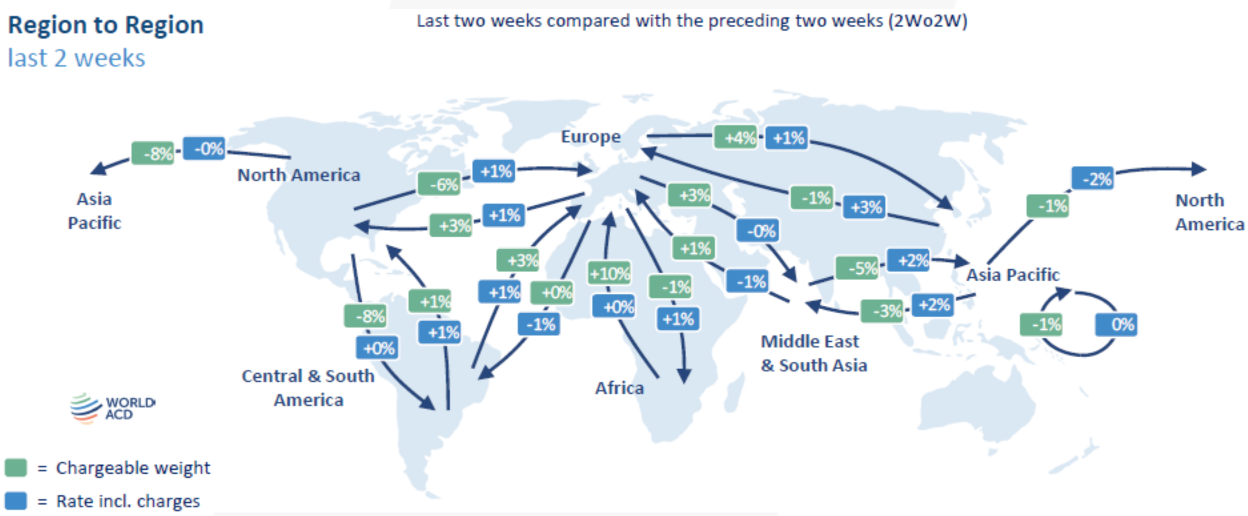



*Source: IATA*

Agricultural residues are projected to be the dominant feedstock by 2050, whereas forestry residues, municipal solid waste, crop-based feedstocks, and waste oils play smaller roles. IATA notes that improved logistics, novel feedstocks, and better technology and policy support are essential to scale.

According to high-frequency metrics from World ACD, global air cargo volumes stabilised in mid-September, with worldwide tonnages rising **↑2%** (w/w) despite mixed regional trends. Africa recorded a modest **↓2%** decline in chargeable weight compared with the previous five weeks, but a notable **↑9%** increase year-on-year, reflecting resilient demand from the continent. Outbound African cargoes to Europe notably increased by **↑10%** this week:

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




*Source: World ACD*

Rates from Africa, however, softened, in line with global trends, as overall spot prices slipped despite higher tonnages in key trade lanes. Capacity across regions remained broadly stable, although Middle East & South

Asia flows contracted, driven by weaker India-USA and Dubai-USA movements. In contrast, Asia Pacific and North America saw rebounds, helping to offset regional losses. The combination of rising capacity and easing rates continues to weigh on yields across most international markets.

In other global aviation news, **(1)** FedEx is pivoting to add capacity to Asia-Europe, after admitting that US tariffs have led to a **$1 billion headwind** – including the ending of the de minimis exemption, which will cost the forwarding giant **$150 million** per quarter.[15] Elsewhere, **(2)** airports in Europe impacted by the cyber-attack on Collins Aerospace claim there are no cargo delays, despite hundreds of flight cancellations over the weekend.[16]

**ENDS**[17]

[15] Lennane, A. 19/09/2025. FedEx pivots airfreight capacity as it faces $1bn tariff headwind on transpacific.
[16] Lennane, A. 22/09/2025. Europe's airports disrupted by cyber attack but no cargo delays claim.
[17] **ACKNOWLEDGEMENT:**

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