

Cargo Movement Update #262¹

Date: 30 November 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)	35 274	40 188	75 462	32 281	36 777	69 058	↑9%
Air Cargo (tons)	4 845	2 937	7 783	4 970	2 892	7 862	↓1%

Monthly Snapshot

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

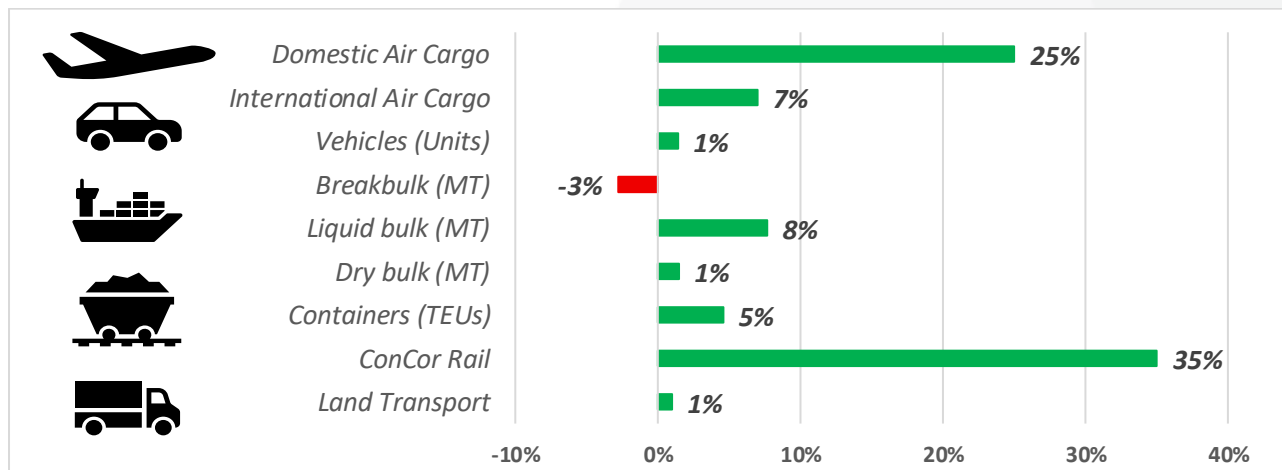
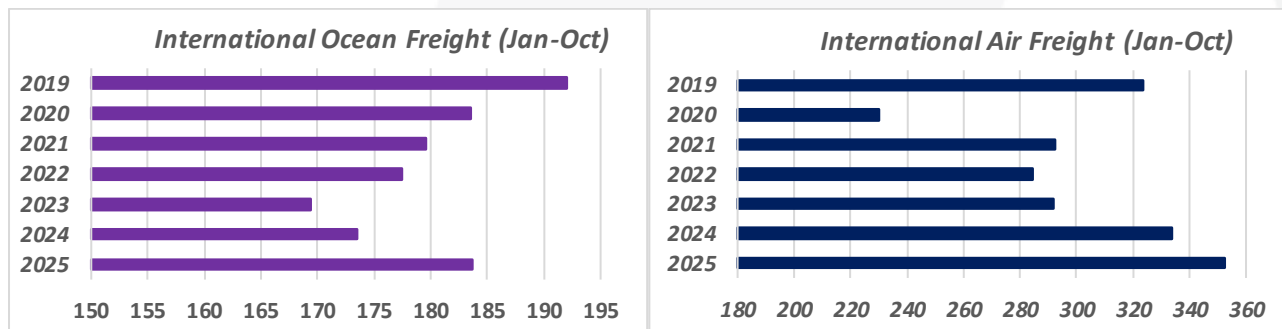


Figure 2 – Year-to-date flows 2019-2025⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~10 780 TEUs was handled per day, with ~11 174 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 1 725 containers, down by ↓42% from last week.
- Cross-border queue: ↑0,1 hrs; transit: ↑0,3 hrs; SA borders: ~12,7 hrs (↑6%); SADC: ~5,7 hrs (unchanged).
- Global Container Port Throughput decreased ↓1,4% (m/m) in September – but remains up ↑4,0% (y/y).
- Global spot rates are down by ↓2,5% (or \$46) to \$1 806/40ft; charter rates remain stable.
- Global air cargo spot rates have continued to edge upwards, as rates are up by ↑2% (w/w) to \$2,93/kg.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 262nd 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: Oct vs. Oct.

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 – the *second last for 2025* – provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **10 780 TEUs** was handled daily, an increase from **9 865 TEUs** the previous week.

Port operations were mainly impacted by adverse weather, vacant berths, as well as equipment challenges and shortages. Adverse weather continued to hinder operations in Cape Town, with CTCT conceding over 40 operational hours this week, as equipment challenges and shortages proved to be the primary operational constraint in Durban. Adverse weather, vacant berths, and equipment challenges mainly impacted operations at our Eastern Cape Ports. At the same time, more than ten operational hours were conceded at the Port of Richards Bay this week. The latest reports from TFR suggest that the annual shutdown of the ConCor line continued last week and until around 18:00 on Thursday, 27 November. The latest Southern Africa Terminal and Service Update from Maersk for Week 47 still provides a positive reading for most of the major terminals in South Africa, despite two terminals experiencing some operational challenges.

Global port throughput softened slightly in September, with Drewry's index declining somewhat month-on-month, though still **↑4,0%** higher year-on-year. Growth remains driven by the Middle East and South Asia, contrasting with a visible slowdown in North America. Market concentration has persisted despite alliance restructuring, with MSC remaining dominant on Asia–Europe routes. Freight rates fell again as vessel supply continues to outpace demand, and CMA CGM plans a limited return to the Suez route, which could deepen oversupply if widely adopted. Other developments include **(1)** Indian Rim trade – connecting South Africa with most of Asia and the Middle East – is growing, and **(2)** the mega transshipment hub Port of Colombo was devastated by Cyclone *Ditwah*.

International air cargo to and from South Africa remained steady this week. The daily average of air cargo handled amounted to **~692 000 kg** inbound (**↓3%**, w/w) and **~420 000 kg** outbound (**↑2%**). Consequently, the current levels continue to trend significantly above last year's level (**~↑13%**) and the comparative levels of pre-pandemic 2019 (**~↑12%**). For the full month of November, international air cargo is up by **↑20%** (m/m) and **↑21%** (y/y), which makes November a record month since our stats began.

Operationally, the continued adverse weather in Gauteng has impacted several warehouses and parking infrastructure at the cargo facilities at OR Tambo.

Air cargo spot rates globally, and from Asia Pacific origins, have continued to edge upwards into the second half of November – primarily driven by America's 27 November Thanksgiving holiday and the associated retail events of Black Friday and Cyber Monday. Tonnages to the US in week 47 from China and Hong Kong, respectively, dipped by **↓4%** and **↓1%** (w/w), although they continued to bounce back from Japan, South Korea and Taiwan. Elsewhere, Hong Kong to Europe tonnages continue to boom. In other aviation news, UK stakeholders have divided opinion on the government's decision to delay de minimis removal, with fears that Britain will become an e-commerce dumping ground.

On the N4 corridor, trade decreased for road transport, while reporting for rail transport was sparse. Truck volumes through the border post decreased to around **1 349 HGVs per day** (**↓2%**, w/w). Queue times increased slightly to an average of **~6,4 hours** at the border. The average processing time was stable at an average of **~6,2 hours** per crossing.

In the SADC region, cross-border road transport times – on average – increased slightly this week. Overall, the average queue time increased by approximately **10 minutes** from last week, while transit time increased by about **a quarter of an hour**. The median border crossing times at South African borders increased by

roughly **three-quarters of an hour**, averaging **~12,7 hrs (↑6%)** for the week. In contrast, the greater SADC region (excluding South African-controlled) remained stable – averaging **~5,7 hrs (unchanged)**. This week, on average, four SADC borders took around a day to cross, namely Beitbridge, Chirundu OSBP, Groblersbrug, and Kasumbalesa (the worst affected, taking **two and a half days** from the **Zambian side**). Operational developments include: **(1)** South African corridor disruptions from accidents and blockades, **(2)** progress toward extended 24-hour border operations at key SA borders, **(3)** elevated security risks linked to shutdown activity, and **(4)** isolated delays in Zimbabwe.

Finally, South Africa's low Q3 GDP outcome at **↑0,5% (q/q)** again highlights the centrality of efficient logistics to economic performance. With more than **80% of trade in volume** moving through our ports (of which containers contributes a **nearly half** of total tradeable port value), declining maritime connectivity (UNCTAD's LSCI for South African ports are down by **↓9%** in the last five years while all of our regional competitors have increased theirs) and persistent throughput constraints continue to limit the competitiveness of key export sectors. Ongoing reforms – ranging from corridor modernisation and third-party access to data-driven initiatives – remain essential to restoring reliability, unlocking investment, and supporting sustained growth. Indeed, the industry is keenly taking note of some developments this week, notably **(1)** ICTSI and Transnet fleshing out the DCT Pier 2 agreement, and **(2)** Traxtion's **R3,4 billion** investment in locomotives and wagons.⁶ Ultimately, strengthening logistics is therefore not peripheral to economic recovery; it is a foundational requirement for improving productivity, expanding trade, and lifting South Africa's medium-term growth trajectory.

⁶ Business Tech. 02/12/2025. [End of an era for 120-year state monopoly in South Africa.](#)

Contents

Weekly Snapshot	1
Monthly Snapshot.....	1
Key Notes	1
Executive Summary	2
Contents	4
1. Ports Update.....	5
a. Container flow overview	5
b. Summary of port operations	7
i. Weather and other delays	7
ii. Cape Town.....	7
iii. Durban	8
iv. Richards Bay	10
v. Eastern Cape ports	10
vi. Transnet Freight Rail (TFR)	10
vii. Major global carriers to be prosecuted for price-fixing	11
viii. Other updates.....	11
2. Air Cargo Update.....	12
a. International air cargo	12
b. Domestic air cargo	12
3. Road and Regional Update	13
a. Lebombo border post update	13
b. SADC cross-border and road freight update	14
4. International Update.....	17
a. Global shipping industry	17
i. Global container port throughput index.....	17
ii. Alliance capacity, vessel scrapping, and market summary	18
iii. Global freight rates and carrier profits	19
b. Global air cargo industry.....	20

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 24 to 30 November (measured in TEUs)

7-day flow reported (24/11/2025 – 30/11/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 022	35 156	↓4%
New Pier (Pier 1)	1 276	8 935	↓27%
Cape Town Container Terminal	1 387	9 708	↑570%
Ngqura Container Terminal	1 758	12 303	↓6%
Port Elizabeth Container Terminal	366	2 563	-
Other	971	6 797	↑22%
Total	10 780	75 462	↑9%

Source: Calculated from TPT, 2025. Updated 30/11/2025.

An average of ~**10 780 TEUs (↑9%)** was handled per day for the last week (24 to 30 November, Table 2) – as the poor weather subsided at most ports except for Cape Town. Consequently, throughput was still somewhat below the projected average of ~**11 298 TEUs (↓5%** actual versus projected).

For the coming week, an increased average of ~**11 174 TEUs (↑4%)** is predicted to be handled (24 to 30 November, Table 3).

Port operations were mainly characterised by inclement weather, vacant berths, as well as equipment challenges and shortages.

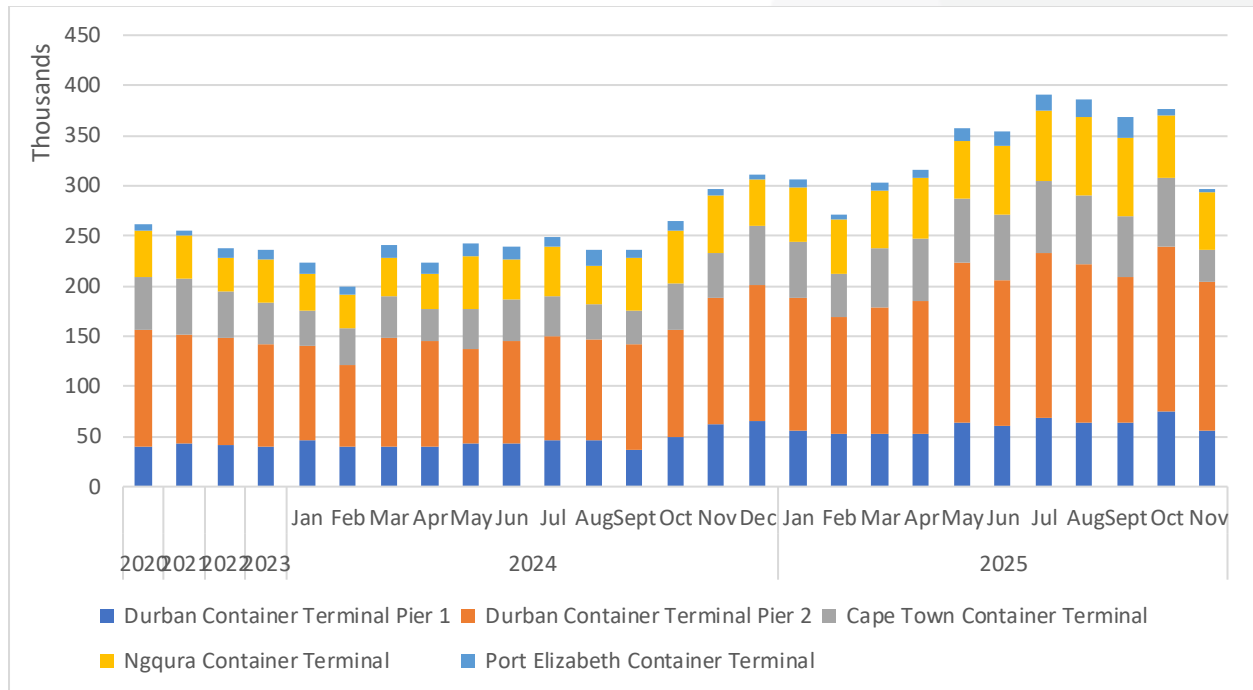
Table 3 – Container Ports – Weekly flow projected for 1 to 7 December (measured in TEUs)

7-day flow projected (01/12/2025 – 07/12/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 224	29 570	↓16%
New Pier (Pier 1)	1 620	11 337	↑27%
Cape Town Container Terminal	1 974	13 819	↑42%
Ngqura Container Terminal	2 010	14 070	↑14%
Port Elizabeth Container Terminal	393	2 753	↑7%
Other	952	6 666	↓2%
Total	11 174	78 215	↑4%

Source: Calculated from TPT, 2025. Updated 30/11/2025.

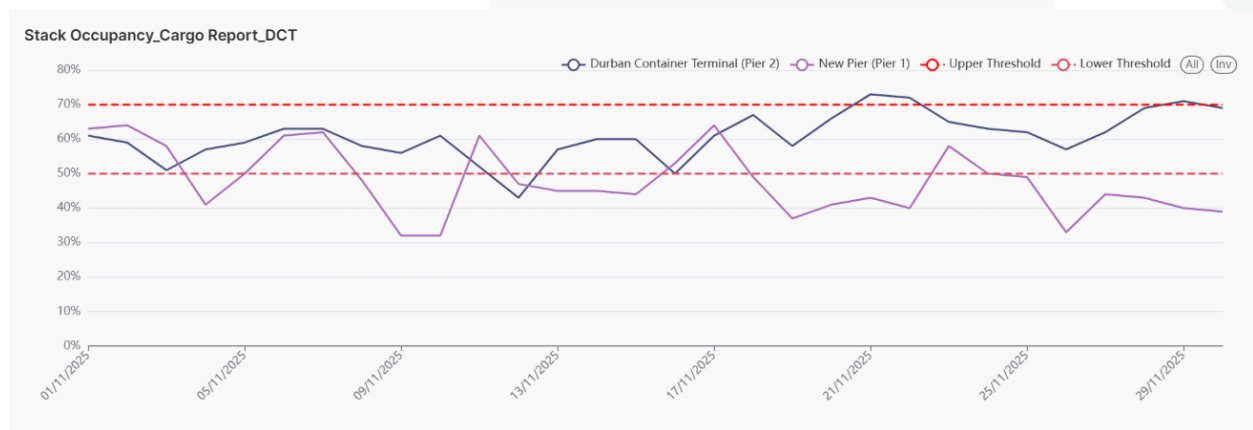
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2025, and updated 30/11/2025.

Figure 4 – Stack occupancy in DCT, general-purpose containers (1 November to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 30/11/2025.

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 (1 November to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 30/11/2025.

b. Summary of port operations

i. Weather and other delays

- Adverse weather continued to hinder operations in Cape Town, with CTCT conceding over 40 operational hours this week.
- Equipment challenges and shortages proved to be the primary operational constraint in Durban.
- Adverse weather, vacant berths, and equipment challenges mainly impacted operations at our Eastern Cape Ports.
- More than ten operational hours were conceded at the Port of Richards Bay this week.

ii. Cape Town

On Thursday, CTCT recorded three vessels at berth and four at anchor, as strong winds and equipment challenges proved to be the primary operational constraints at the port. To contextualise this, the terminal conceded over 40 operational hours this week due to adverse weather. On the landside, between Monday and Friday, the terminal managed to service around 4 064 trucks while handling approximately 264 rail units. On the waterside, the terminal executed approximately 2 315 container moves across the quay during the same period. Additionally, this week, the terminal had **eight STS cranes**, between **24 and 27 RTGs**, and approximately **59 hauliers** available.

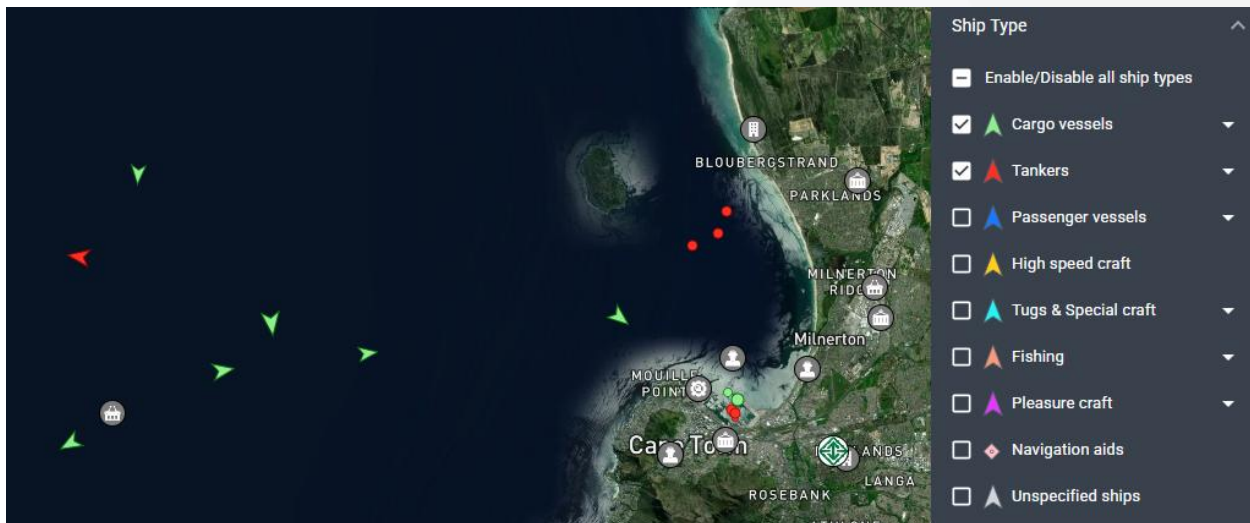
The latest reports from Maersk suggest that due to the congestion and adverse weather conditions in Cape Town, the CMA CGM Masai Mara will only be doing a discharge call at the Port of Cape Town. Thus, to accommodate this adjustment, all export bookings will be transferred to the next MW1 vessel, which is the APL Holland 547E.

On Wednesday, CTMPT had one vessel at berth, with zero vessels waiting at outer anchorage. In the previous 24 hours, the terminal managed to handle 203 container moves on the waterside, while servicing around 145 trucks on the landside. Stack occupancy figures were recorded at 28% for the general stack, 19% for the reefer stack, and 3% for the empty stack. Towards the end of the week, the terminal operated with two STS cranes and three straddle carriers.

Between 24 and 30 November, the FPT terminal handled seven vessels: two multi-cargo, one container, one breakbulk, two dry bulk, and one vessel containing cement. Berth occupancy during this period was recorded at 66%. The terminal planned to handle eight more vessels between 1 and 7 December, with another five

vessels scheduled between 8 and 14 December. Adverse weather conditions, equipment breakdowns, and the late arrival of transporters accounted for the majority of delays experienced at the terminal.

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



Source: Marine Traffic. Updated 30/11/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded one vessel at berth, with two vessels at anchor. Between Monday and Friday, the terminal executed at least 4 107 gate moves and 139 rail moves on the landside. The **TTT** for the week averaged **~39 minutes (↓11%, w/w)**, and the average **staging time** was **~22 minutes (↓33%)**. Additionally, the terminal moved over 5 100 TEUs across the quay on the waterside during the same period. The terminal had between **three and four** (out of seven) **STS cranes** and around **14-16** (out of 25) **RTGs** available for the most significant part of the week. STS crane availability thus roughly sat at 50% for the week, with RTG availability roughly sitting at 60%.

Pier 2 had four vessels on berth and two at anchorage on Thursday, as equipment breakdowns and shortages prevented optimal operational performance this week. The terminal operated with **10 to 11 gangs** and moved over **17 800** containers across the quay between Monday and Friday on the waterside. Approximately **13 615** gate moves were executed on the landside during the same period. The **average TTT** for the week was to **~109 minutes (↓12%, w/w)**, and the average staging time was **~138 minutes (↑28%)**. Approximately 2 003 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **58 and 69** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **59%** during this period.

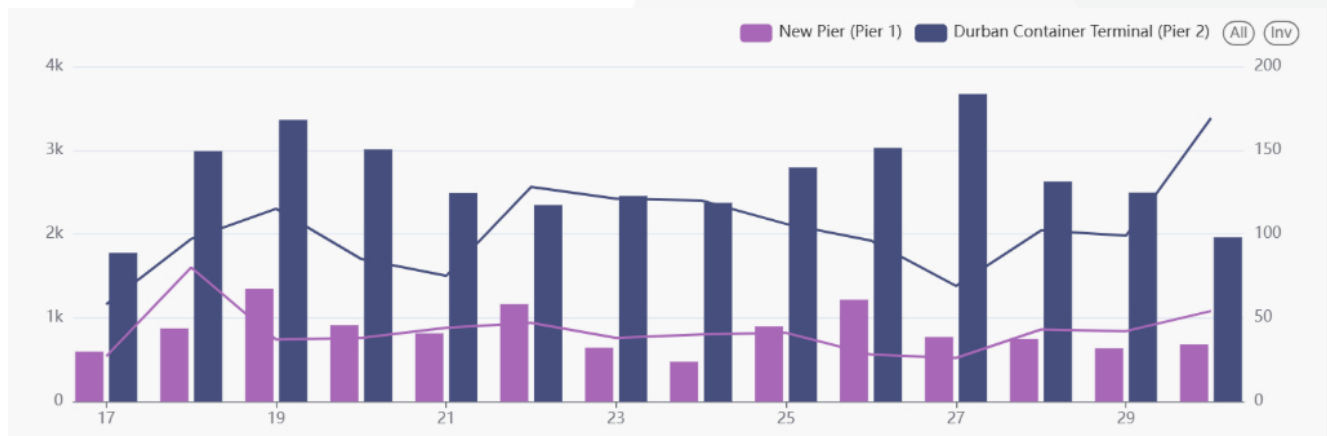
Durban's MPT terminal recorded two vessels at berth on Thursday and none at outer anchorage. Stack occupancy for containers was recorded at 29% and the breakbulk stack at 35%. In the preceding 24 hours, 276 containers and 2 237 tons of breakbulk were handled on the waterside. On the landside, 435 container trucks were serviced at a TTT of ~29 minutes. Additionally, 13 breakbulk trucks were serviced during this period, containing approximately 334 tons. During this period, one crane, ten reach stackers, eight forklifts, and 20 ERFs were in operation. The latest reports suggest that Cranes 04 and 06 are currently out of commission, with one machine expected to return to operations over the weekend. Additionally, the ETR of the fourth crane was revised to mid-March 2026.

Between Wednesday and Thursday, Maydon Wharf MPT recorded two berthed vessels and zero at outer anchorage. The terminal managed to move approximately 905 tons across the quay on the waterside during this period, while servicing around eight trucks on the landside, containing approximately 285 tons.

On Thursday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with two at anchorage. In the preceding 24 hours, the terminal handled 1 484 road units and 255 units on rail on the landside, while 2 348 units were handled on the waterside. Overall stack occupancy was recorded at 85%, with 80% recorded at Q+R and 90% at G-berth. The terminal had 157 abnormal loads and managed to handle 31.

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.

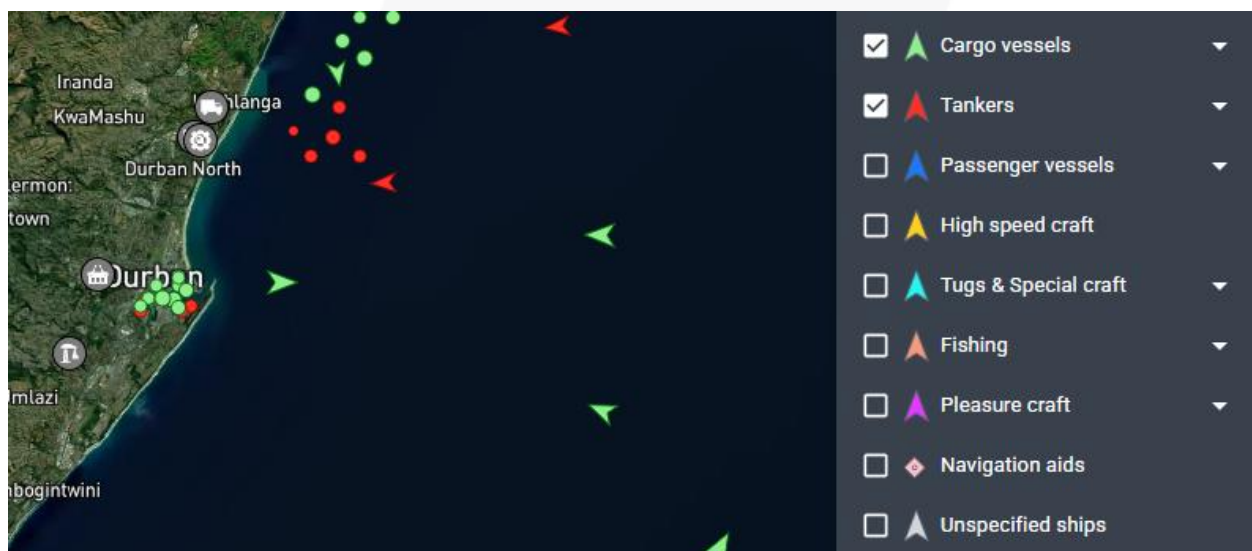
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 30/11/2025.

The queue of container vessels waiting outside Durban has increased significantly this week. On Monday evening (1 December), **two** container vessels were waiting outside at anchorage for Pier 1, **seven** for Pier 2, and **one** for Point. The queue of dry (**one**), liquid (**five**), and breakbulk (**one**) vessels has remained steady from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 30/11/2025 at 14:00.

iv. Richards Bay

On Friday, the Port of Richards Bay had 18 vessels at anchor and 19 on the berth, translating to six vessels at DBT, five at MPT, five at RBCT, two at the liquid bulk terminal, and one vessel undergoing repairs. Two tugs and one pilot boat were deployed to support marine resources towards the end of the week. Adverse weather conditions proved to be the primary operational constraint at the port this week.

The daily average coal throughput for the week decreased significantly again and averaged around **129 000 tons** (↓**28%**, w/w) a day. An average of **20 trains** was serviced on the landside (down by **two** from last week), and slightly below the target (of 22 trains).

v. Eastern Cape ports

On Thursday, 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 first time in several months, the Ports of Coega and PE did not need to revert to sharing marine equipment. Stack occupancy figures were recorded at 22% for reefers and 28% for the general stack. There were instances this week where the berths were not fully occupied, which negatively impacted operational performance at the terminal. Moreover, during this period, the terminal handled approximately 2 082 TEUs on the waterside. Approximately 392 trucks were processed on the landside at a TTT of ~29 minutes. For the most significant part of the week, the terminal had between 3 and 7 STS cranes, between 12-25 RTGs, and around 19-40 hauliers in service.

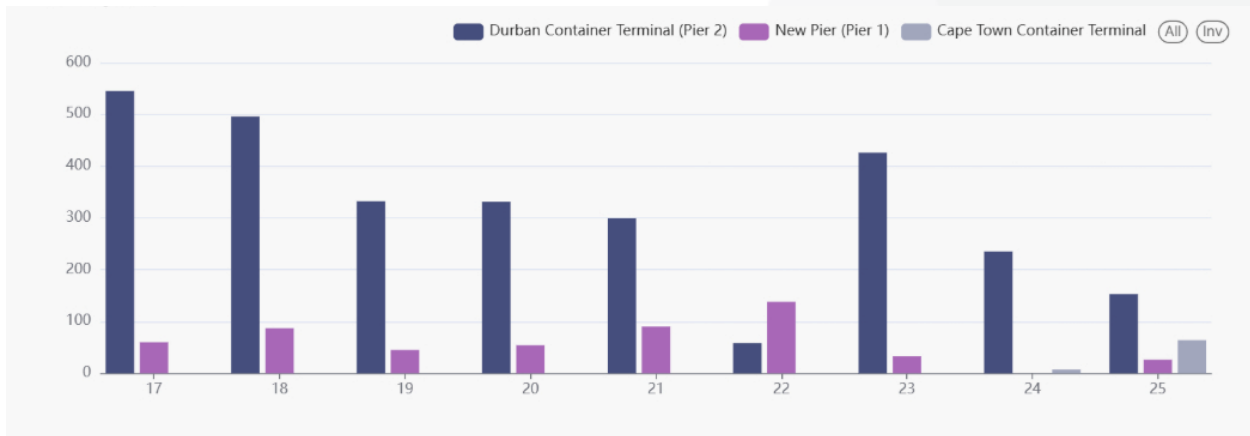
PECT recorded one vessel on berth and zero at outer anchorage on Thursday. In the preceding 24 hours, the terminal managed to handle approximately 1 290 TEUs and 298 reefers on the waterside. On the landside, the terminal managed to service around 238 trucks at a TTT of ~36 minutes. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and eight straddles available.

On Wednesday, the Ro-Ro terminal recorded one vessel at berth and none at anchor. In the 24 hours between Wednesday and Thursday, the terminal managed to handle 2 200 units, resulting in a stack occupancy figure of 41%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that the annual shutdown of the ConCor line continued last week and until around 18:00 on Thursday, 27 November. Operations are set to normalise over the weekend and into next week. Additionally, towards the end of the week, DCT Pier 2 had 411 ConCor units on hand with a dwell time of 192 hours and 474 over-border units with a dwell time of 109 days.

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



Source: Calculated using data from Transnet, 2024. Updated 30/11/2025.

In the last week (24 to 30 November), rail cargo on the ConCor line out of Durban was reported at **1 725** containers, down by **↓42%** from the previous week's **2 994** containers.

vii. Major global carriers to be prosecuted for price-fixing

South Africa's antitrust body referred a price-fixing complaint against the local units of some of the world's top shipping companies (including A.P. Moller-Maersk A/S and CMA CGM SA) to a tribunal for prosecution. The companies allegedly fixed the general rate increase charged to customers for shipping cargo between South Africa and Asia and between the nation and the western part of Africa from 2008 to 2018, in contravention of domestic antitrust laws.⁷

The commission's probe found that the shipping companies charged the same rate increase for the routes from Shanghai, Ningbo and Shekou to the southeastern port city of Durban as they did from Durban to Hong Kong, and from Qingdao to Durban. The other respondents in the case are local units of MSC Mediterranean Shipping Co, Pacific International Lines, Mitsui OSK Lines, Cosco Shipping Holdings, Evergreen Marine Corp and K Line Shipping.

viii. Other updates

The latest Southern Africa Terminal and Service Update from Maersk for Week 47 still provides a positive reading for most of the major terminals in South Africa, despite two terminals experiencing some operational challenges. No waiting times were recorded at CTMPT, Coega, or PECT. However, due to the severe weather challenges experienced at CTCT, the terminal recorded a waiting time of 0-6 days. Conversely, DCT Pier 2 recorded a waiting time of 1-2 days, while Pier 1 recorded a waiting time of 5-6 days, which is mainly due to operational challenges at the terminal.

⁷ Monteiro, A. 02/12/2025. [South Africa to prosecute Maersk, CMA units for price-fixing.](#)

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 (24 to 30 November). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in November 2024 averaged ~987 000 kg.

Table 4 – International inbound and outbound cargo from OR Tambo

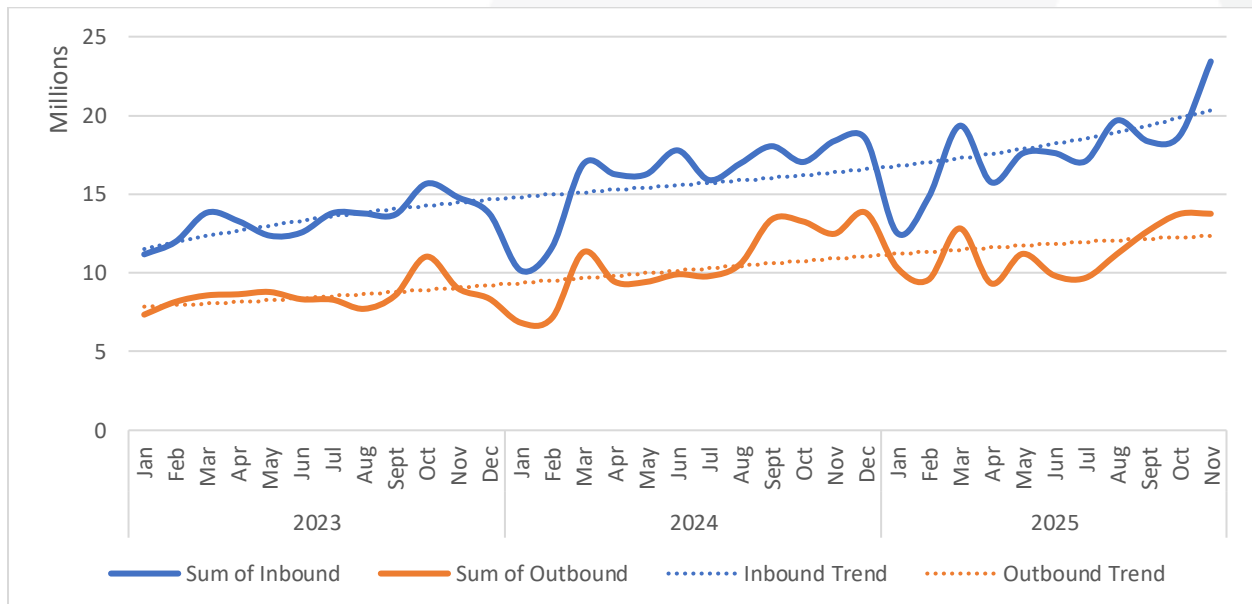
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	692 196	4 845 371	↓3%
Volume outbound	419 629	2 937 406	↑2%
Total	1 111 825	7 782 777	↓1%

Courtesy of ACOC. Updated: 30/11/2025.

International air cargo to and from South Africa remained steady this week. The daily average of air cargo handled amounted to ~692 000 kg inbound (↓3%, w/w) and ~420 000 kg outbound (↑2%). Consequently, the current levels continue to trend significantly above last year’s level (~↑13%) and the comparative levels of pre-pandemic 2019 (~↑12%). For the full month of November, international air cargo is up by ↑20% (m/m) and ↑21% (y/y), which makes November a record month since our stats began.

The following figure shows the international air cargo flows to and from all terminals since the start of 2023:

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



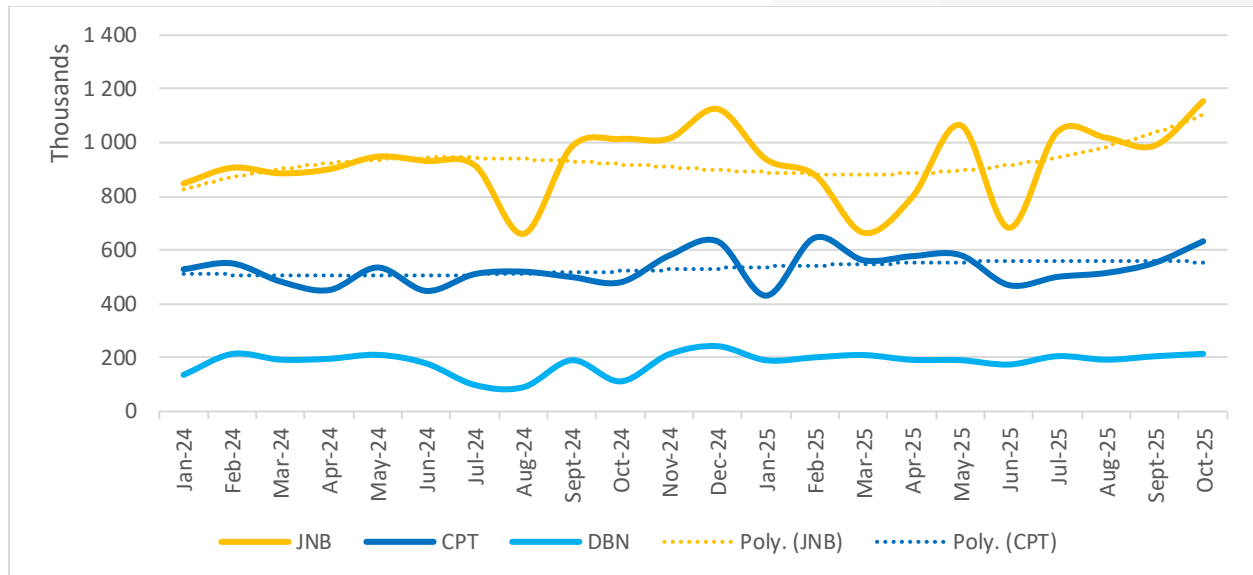
Calculated from ACOC. Updated: 30/11/2025.

Operationally, the continued adverse weather in Gauteng has impacted several warehouses and parking infrastructure at the cargo facilities at OR Tambo.

b. Domestic air cargo

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 30/11/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (24 to 30 November), movements along the N4 corridor decreased slightly for road transport, while reporting for rail transport was sparse.

- Truck volumes through the border post decreased to around **1 349 HGVs per day** (↓2%, w/w).
- Queue times increased slightly to an average of **~6,4 hours** at the border.
- The average processing time was stable at an average of **~6,2 hours** per crossing.

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
Average	1 349	1 356	972	221	37	90	42	289	0	n/a	1	n/a
% (w/w)	-2%	1%	-4%	1%	27%	2%	11%	-1%	-300%	n/a	-33%	n/a

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 30/11/2025.

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 30/11/2025 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 increased by approximately **10 minutes** from last week, while transit time increased by about **a quarter of an hour**.
 - The median border crossing times at South African borders increased by roughly **three-quarters of an hour**, averaging **~12,7 hrs (↑6%)** for the week.
 - In contrast, the greater SADC region (excluding South African-controlled) remained stable – averaging **~5,7 hrs (unchanged)**.
- 1. South Africa (N3 Corridor):**
 - a. Multi-truck accident (four trucks) on the N3 Durban-bound on Saturday.
 - b. Containerised truck overturned near Heidelberg on Monday.
 - c. N3 near Tugela Bridge blockaded; northbound lanes closed after drivers' keys were taken.
 - d. One northbound lane to Johannesburg was later reopened; all Durban-bound lanes remained closed for an extended period.
 - 2. South African border post operations:**
 - a. Victoria Falls Border to commence 24-hour operations shortly.
 - b. Skilpadshek, Groblersbrug, and Kopfontein are expected to transition to 24-hour operations before the end of the year.
 - 3. Safety and security alerts:**
 - a. ATDF-ASA announced a national shutdown from midnight 26–27 November, citing dissatisfaction with the AARTO demerit system.
 - b. Consequently, SAPS activated contingency plans and warned drivers to remain vigilant.
 - c. R555 (Burgersdorp–Ohrigstad) blocked with stones and burning tyres.
 - d. Driver attacked at Beitbridge weighbridge on Thursday; belongings stolen while changing a tyre, the incident occurred in full view of the security office.
 - 4. Zimbabwe:**
 - a. Truck blocked traffic in Chinhoyi on Saturday; motorists advised to proceed with caution.

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

Table 6 – Delays⁸ summary – South African borders⁹ (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	594	28,9	6,6	29,0	17 824	4 159
Beitbridge	Zimbabwe-SA	530	13,2	2,2	13,1	15 904	3 711
Groblersbrug	SA-Botswana	251	31,4	4,1	31,0	7 530	1 757
Martin's Drift	Botswana-SA	218	6,2	1,1	6,1	6 540	1 526
Kopfontein	SA-Botswana	219	11,6	0,6	11,4	6 570	1 533
Tlokweng	Botswana-SA	25	0,6	0,2	0,3	750	175
Violsdrift	SA-Namibia	30	3,8	1,3	3,5	900	210
Noordoewer	Namibia-SA	20	1,9	0,5	1,5	600	140
Nakop	SA-Namibia	30	4,4	0,3	4,2	900	210
Ariamsvlei	Namibia-SA	20	1,0	0,3	1,0	600	140
Skilpadshek	SA-Botswana	348	13,3	3,3	13,2	10 440	2 436
Pioneer Gate	Botswana-SA	78	0,0	0,0	0,0	2 340	546
Ramatlhabama	SA-Botswana	220	3,6	1,1	3,5	2 370	553
Ramatlhabama	Botswana-SA	79	0,5	0,1	0,3	6 600	1 540
Lebombo	SA-Mozambique	1 372	6,4	1,4	6,2	41 160	9 604
Ressano Garcia	Mozambique-SA	1 322	2,6	0,3	2,4	39 660	9 254
Sum/Average		5 356	8,1	1,5	7,9	160 688	37 494

Source: TLC, FESARTA, & Crickmay, week ending 23/11/2025.

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	15,2	5,4	14,9	9 600	2 240
Central Corridor	798	0,5	0,1	0,5	23 940	5 586
Dar Es Salaam Corridor	1 819	15,8	1,8	15,6	45 570	10 633
Maputo Corridor	2 694	4,5	0,8	4,3	80 820	18 858
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 550	17,5	2,6	17,2	106 508	24 852
Northern Corridor	2 817	0,8	0,1	0,8	92 520	21 588
Trans Caprivi Corridor	999	4,2	0,8	4,0	29 970	6 993
Trans Cunene Corridor	100	2,8	0,6	2,6	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700
Trans Oranje Corridor	116	10,5	1,5	10,3	3 480	812
Sum/Average	13 440	7,1	1,1	6,9	402 218	93 851

Source: TLC, FESARTA, & Crickmay, week ending 23/11/2025.

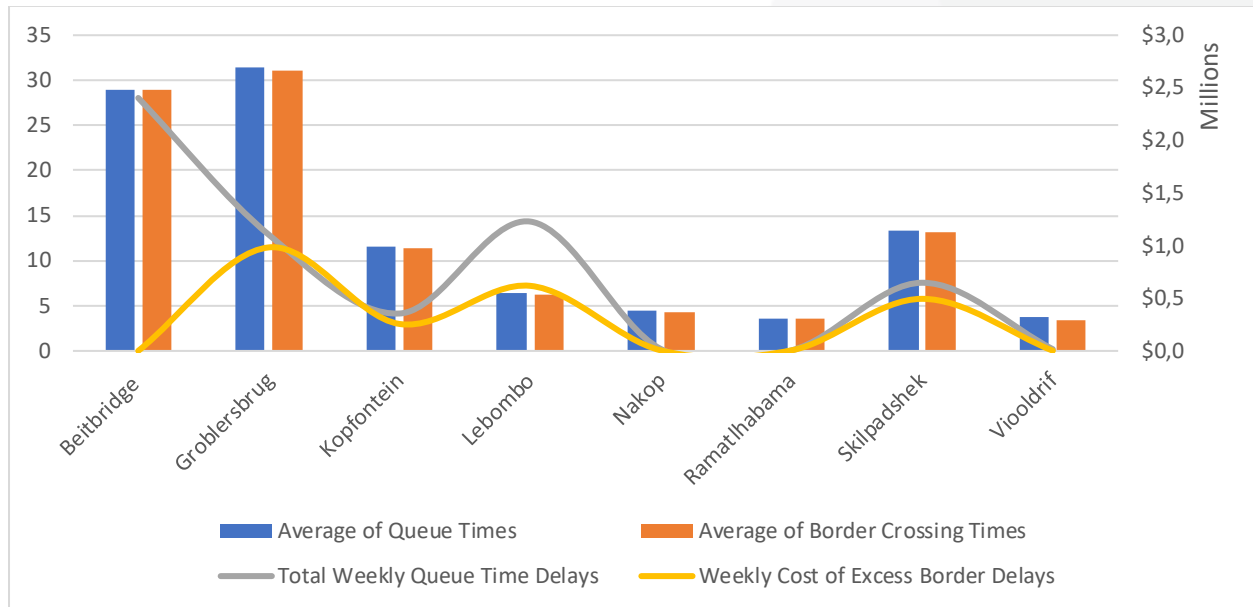
The following graph shows the weekly change in cross-border times and associated estimated costs:

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.

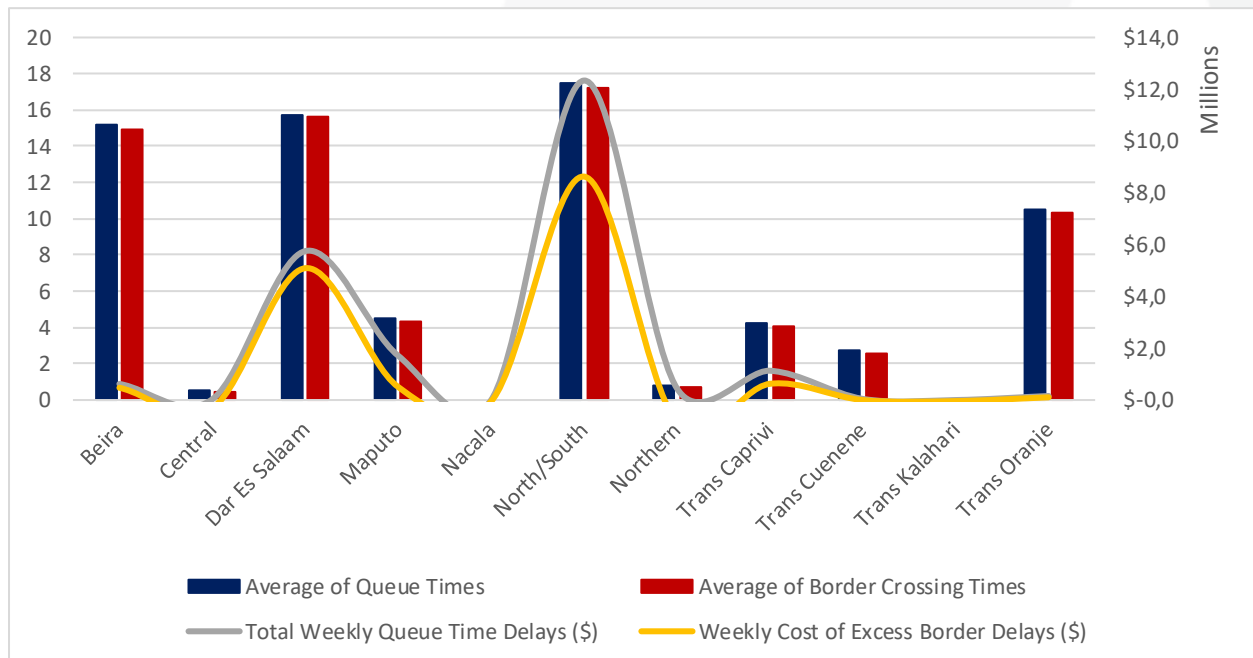
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 23/11/2025.

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

Figure 14 – Weekly cross-border delays & estimated cost from a corridor perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 23/11/2025.

In summary, cross-border queue time averaged **~7,1 hours** (up by **~0,1 hours** from the previous week's **~7,0 hours**), indirectly costing the transport industry an estimated **\$22,2 million (R385 million)**. Furthermore, the week's average cross-border transit times also hovered around **~6,9 hours** (up by **~0,3 hours** from the **~6,7 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$14,1 million (R245 million)**. The total indirect cost for the week amounts to an estimated **~\$36,4 million (R630 million)**, up by **↑4,6%** from the **~R602 million** in the previous report).

4. International Update

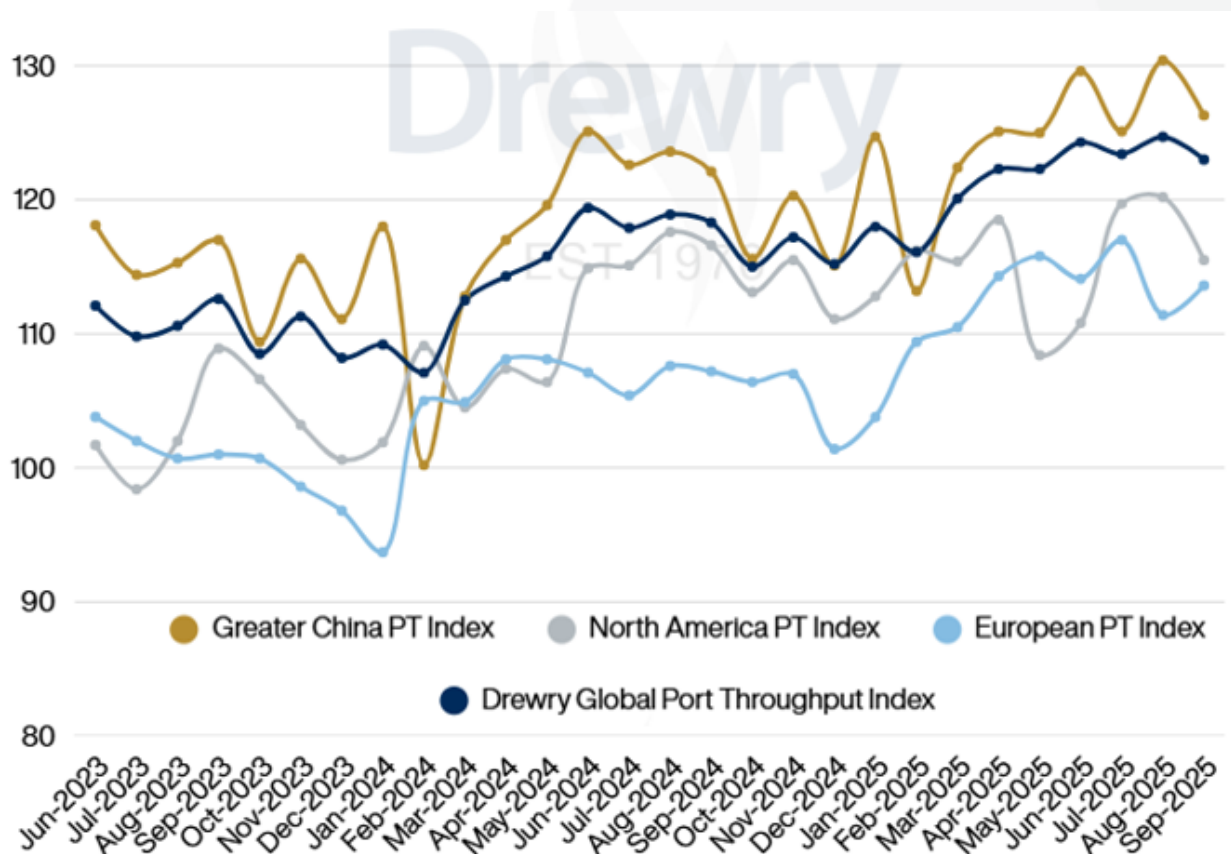
The following section provides some context around the global economy and its impact on trade, mainly an update on (a) the global shipping industry, and (b) the global aviation industry.

a. Global shipping industry

i. Global container port throughput index

Drewry’s “Global Container Port Throughput Index” decreased **↓1,4%** (m/m) in September – but remains up **↑4,0%** (y/y). Meanwhile, the rolling 12-month average growth rate for global port handling fell to **↑5,9%**. As 2025 progresses, overall YTD growth of **↑6,4%** remains well ahead of the anticipated growth for the full year, which was raised to **↑4,8%** in October. The growth continues to be driven by the Middle East and South Asia region, up **↑4,7%** (m/m) and **↑8,4%** YTD. Meanwhile, the slowdown in North America is becoming much more visible, down **↓1,0%** (y/y) in September and up *only* **↑4,1%** YTD.

Figure 15 – Drewry Global Port Throughput Index



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

Elsewhere, the respective regional indices indicated the following movements for September:

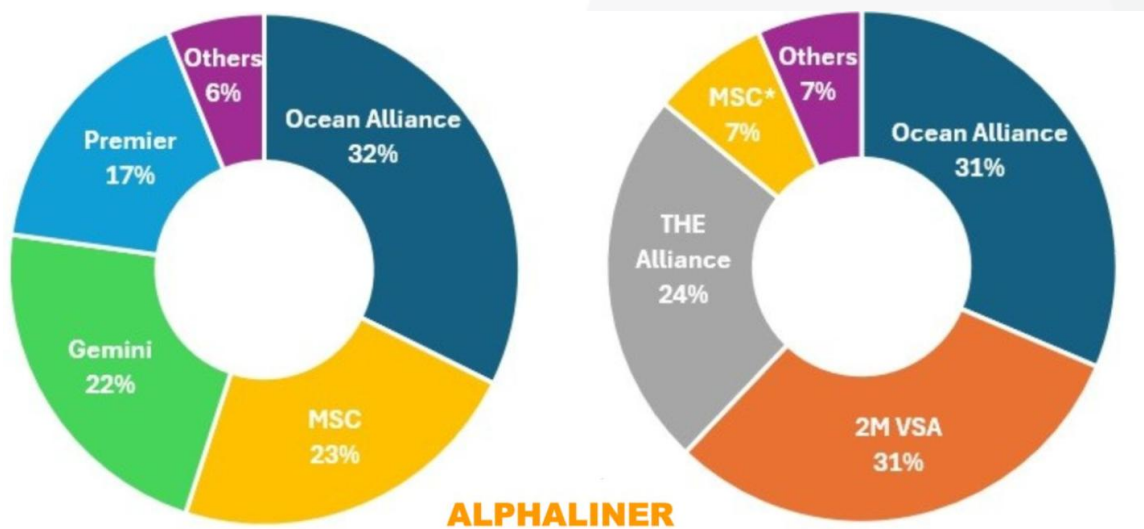
- The *Greater China Container Index* fell **↓3,1%** (m/m), but remains up by **↑3,5%** (y/y).
- The *North American Container Index* fell **↓3,9%** (m/m) to **115,5 points**, down **↓1,0%** (y/y).
- The *European Container Index* rose **↑2,1%** (m/m), up **↑6,0%** (y/y) to **113,6 points**.

ii. Alliance capacity, vessel scrapping, and market summary

The market structure of the Far East–Europe trade has not been fundamentally altered by the alliance changes that occurred in February, when MSC exited the 2M Vessel Sharing Agreement with Maersk and the Danish carrier initiated the new Gemini Cooperation with Hapag-Lloyd. Hapag-Lloyd, in turn, left THE Alliance, while the remaining member carriers continued their cooperation as a trio under the new name Premier Alliance. In November 2024, four alliances with nine global carriers controlled **93,4% of the trade**, leaving a **6,6% market share** for smaller carriers.

One year later, the leading standalone carrier, MSC, along with eight major carriers in three alliances, controlled **93,9% of vessel capacity**, leaving **6,1% to smaller competitors**. Unsurprisingly, MSC is also the largest Asia–Europe operator by capacity. The world’s largest carrier operated a fleet of 1,78 million TEUs in November (22,7% market share). However, MSC increased its fleet on this route by only 2,0% year-on-year, which is well below the 6,2% market average.

Figure 16 – Far East – Europe market share per fleet deployed (LH: 2025; RH: 2024)



Source: [Alphaliner](#)

For the market as a whole, the conditions for carriers have continued to worsen, as shipping demand – measured in TEU-miles – is now growing more slowly than vessel supply.

Meanwhile, CMA CGM is planning a limited return to the Suez Canal route, resuming some Asia–Europe and Asia-Mediterranean sailings from late December; other major carriers such as Maersk and Hapag-Lloyd are not yet re-routing vessels through the Suez. The return of diverted ships to the Suez – potentially adding millions of TEUs back into normal routes – could deepen oversupply and drive a further 6% drop in global container demand-by-miles.

Figure 17 – Global container shipping supply and demand



Source: Linerlytica

Elsewhere, other notable global developments this week include:

1. Indian Rim trade growth:

- a. A new global mega trade, the Indian Rim trade – stretching from South Africa all the way along the Middle East, India, South-East Asia and Oceania – is emerging.¹¹
- b. Home to around three-quarters of the world’s population, significant growth is forecast to take place across the next decade or so – especially in consumer and value-added goods, with the increase of a global middle class.

2. Mega transshipment hub Colombo devastated by Cyclone *Ditwah*:

- a. Operations at Sri Lanka’s Colombo Port were getting back to some sort of schedule on Monday, after the devastating impact of Cyclone *Ditwah*.
- b. Marine terminals were forced to suspend operations on Thursday, as the port is forecast to take about a week to recover.

iii. Global freight rates and carrier profits

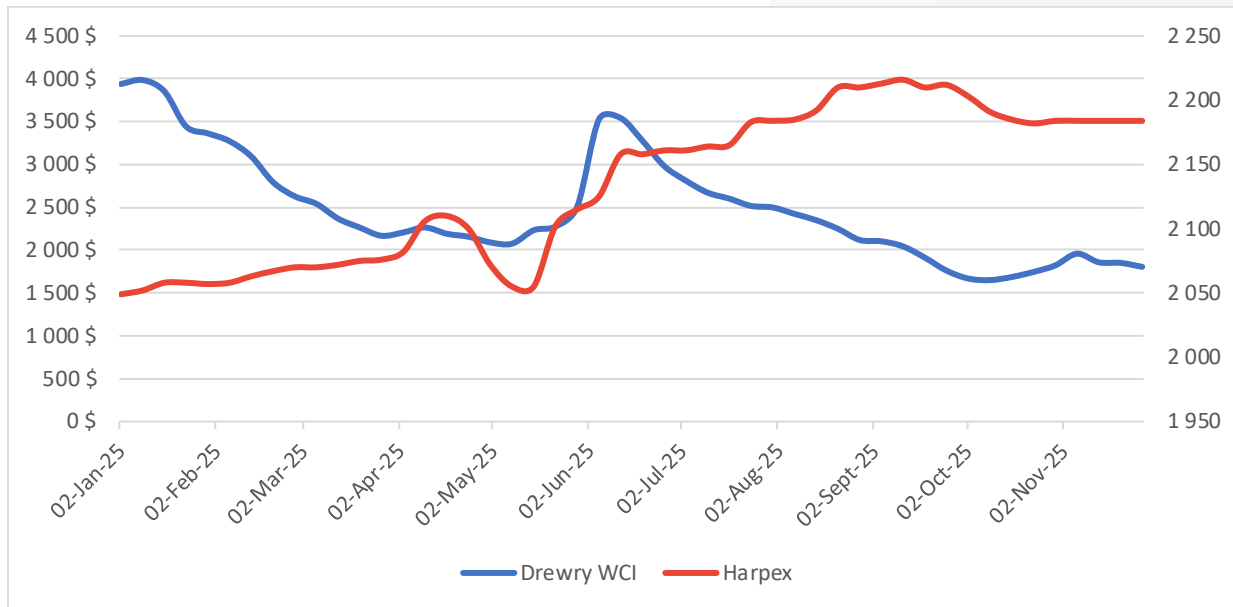
Global freight rates took another slight dive this week, with the “*World Container Index*” (WCI) sliding slightly and is down by **↓2,5%** (or **\$46**) to **\$1 806 per 40-ft container**.¹² Elsewhere, the charter market remains stable, with the *Harpex Index* trading unchanged at **2 184 points**.¹³ The following shows the respective indices for the *year-to-date*:

¹¹ Van Marle, G. 27/11/2025. [Trade diversification tales 19: The evolution of the Asia-Africa megaregion.](#)

¹² Drewry. 27/11/2025. [World Container Index.](#)

¹³ Harpex. 28/11/2025. [Harper Petersen Charter Rates Index.](#)

Figure 18 – World Container Index (WCI) & Harpex Charter Index



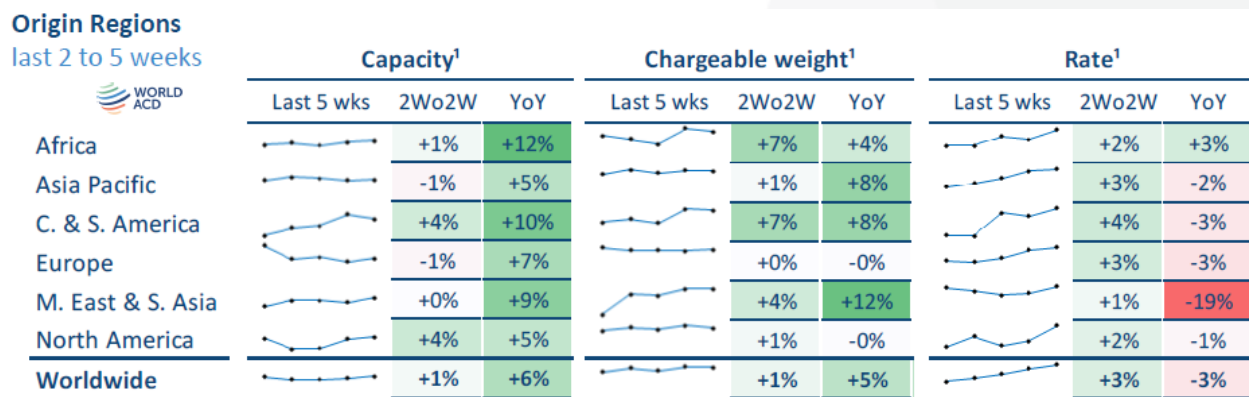
Source: Calculated from [Drewry](#) & [Harpex](#)

b. Global air cargo industry

According to high-frequency metrics from World ACD, air cargo spot rates globally, and from Asia Pacific origins, have continued to edge upwards into the second half of November – primarily driven by America’s 27 November Thanksgiving holiday and the associated retail events of Black Friday and Cyber Monday. Those increases helped to push up average global spot rates by **↑2%** (w/w) to **\$2,93 per kilogram**, with overall full-market rates rising **↑1%**, based on a mix of spot and contract rates.

Tonnages to the US in week 47 from China and Hong Kong, respectively, dipped by **↓4%** and **↓1%** (w/w), although they continued to bounce back from Japan, South Korea and Taiwan. Spot rates from Asia Pacific origins to Europe have also continued to build on a weekly basis, with further increases in week 47 mainly from China (**↑2%**), Hong Kong (**↑3%**), Japan (**↑8%**), Taiwan (**↑7%**), Vietnam (**↑7%**) and Malaysia (**↑10%**), driving up overall spot prices from Asia Pacific to Europe, by **↑2%**, to **\$4,39/kg**. However, those rates are down **↓10%** on an annual basis from their relatively high levels this time last year.

Figure 19 – Capacity, chargeable weight and rates (last two to five weeks, % change)



Source: [World ACD](#)

In other aviation news, UK stakeholders have divided opinion on the government’s decision to delay de minimis removal, with fears that Britain will become an e-commerce dumping ground.¹⁴ The decision to delay de minimis removal until 2029 could create a protracted period for e-commerce retailers to exploit the continued regulatory liberation already abolished elsewhere in the globe.

ENDS ¹⁵

¹⁴ Goldstone, C. 27/11/2025. [De minimis delay could see UK become an ecommerce dumping ground.](#)

¹⁵ **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.*