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Cargo Movement Update #263[1]

Date: 7 December 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)	38 778	44 179	**82 957**	35 274	40 188	**75 462**	↑10%
Air Cargo (tons)	3 619	3 045	**6 664**	4 845	2 937	**7 783**	↓14%

Monthly Snapshot

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

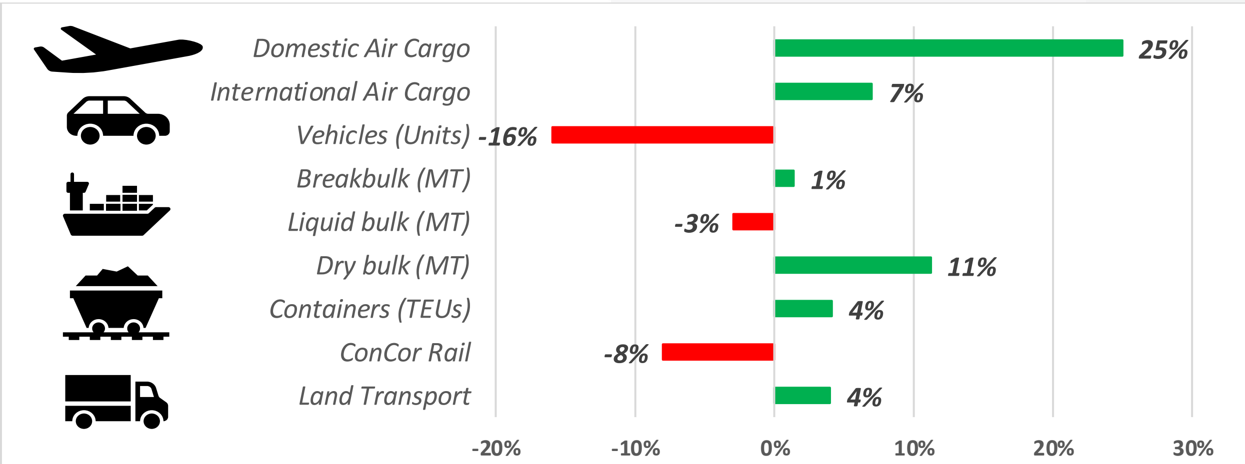
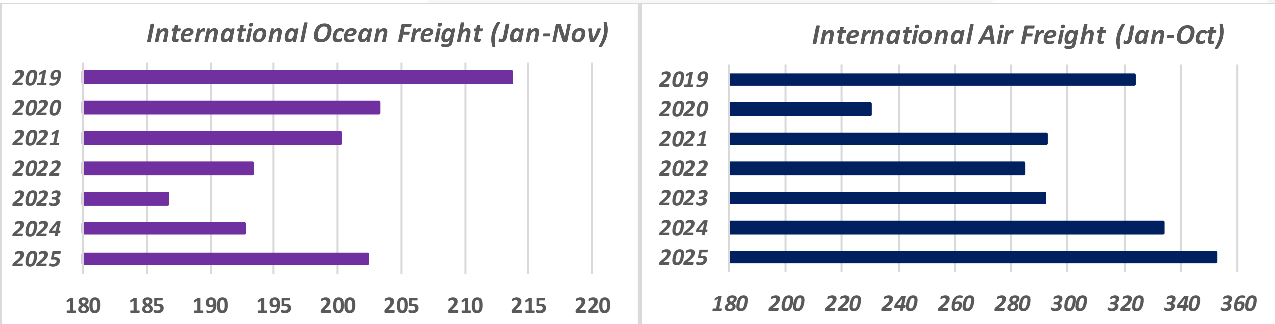


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~11 851 TEUs** was handled per day, with **~11 174 TEUs** projected for next week.
- TNPA Oct: TEUs are up by **↑11%** (m/m) and by **↑4%** (y/y). Total bulk: **↑21%** (m/m), but **↓2%** (y/y).
- Rail cargo handled out of Durban was reported at **2 824** containers, up by **↑53%** from last week.
- Cross-border queue: **↑0,2 hrs**; transit: **↑0,3 hrs**; SA borders: **~12,0 hrs** (**↓6%**); SADC: **~6,6 hrs** (**↑16%**).
- Global spot rates bounced back significantly and were up by **↑6,7%** (or **$121**) to **$1 927/40ft**.
- Global air-cargo demand (CTKs) increased by **↑4,1%** (y/y), while capacity (ACTKs) rose by **↑5,1%** (y/y).

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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 *263rd* 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: Nov vs. Nov; except Air (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 *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 **11 851 TEUs** was handled daily, an increase from **10 780 TEUs** the previous week.

Port operations were mainly impacted by inclement weather, vacant berths, as well as equipment challenges and shortages. More than 50 operational hours were conceded at the Port of Cape Town this week due to adverse weather, as well as system issues, equipment breakdowns and shortages, which prevented optimal performance in Durban. Vacant berths and adverse weather ensured operational delays at our Eastern Cape Ports, while marine equipment challenges and poor weather proved to be the primary operational constraints in Richards Bay. The latest reports from TFR suggest that the annual shutdown of the ConCor line concluded last week, with trains resuming operations on the rail network. No significant incidents were reported on the ConCor this week; however, some locomotive failures prevented optimal rail performance on the line between City Deep and Mafikeng. The latest reports from Maersk and Hapag-Lloyd confirm that East-West Suez transits remain suspended due to Red Sea security concerns. Additionally, Maersk will revise Origin and Destination Documentation Fees, as well as Import and Export Service charges for shipments to/from South Africa and neighbouring countries, with effect from 1 January 2026 until further notice.

UNCTAD's *Global Trade Update* projects that global trade in goods and services will surpass **$35 trillion** in 2025, marking an approximate **↑7%** annual increase (**~$2,2 trillion**) compared with 2024 if current estimates hold. This growth continues through the second half of the year, with goods contributing roughly **$1,5 trillion** and services about **$750 billion** to the overall expansion. While momentum persists into Q4, growth is expected to moderate – projected at approximately **↑0,5%** for goods and **↑2%** for services. Importantly, after earlier increases driven partly by price inflation, trade growth is expected to be volume-led as goods prices decline, signalling resilient underlying demand.

Global trade is set to conclude 2025 on a strong footing, with UNCTAD projecting goods and services trade to exceed **$35 trillion**, a **↑7% annual expansion** driven increasingly by real volume gains rather than price effects. Growth remains broad-based, with **East Asia and Africa** outperforming and **South–South trade** rising by **↑8%**, although geopolitical fragmentation and persistent imbalances continue to shape trade patterns.

In containerised shipping, **global throughput rose ↑2,8%** month-on-month **in October**, while prices fell **↓3,9%**, maintaining a substantial **↓22%** year-on-year decline. Sub-Saharan Africa recorded softer monthly volumes, yet annual growth in both imports (**↑9,9%**) and exports (**↑8%**) remains robust, supporting a 2025 global volume outlook of **↑3,2–4%**. Market fundamentals continue to soften: carriers face sustained rate pressure amid a record **11,5 million-TEU orderbook**, signalling prolonged oversupply risks. Freight rates ticked up modestly in early December, led by trans-Pacific lanes, while charter markets remain stable.

International air cargo to South Africa was significantly reduced this week. The daily average of air cargo handled amounted to **~517 000 kg** inbound (**↓25%**, w/w) and **~435 000 kg** outbound (**↑4%**). Despite the reduction, the current levels continue to trend significantly above last year's level (**~↑14%**) and the comparative levels of pre-pandemic 2019 (**~↑14%**), as volumes in December typically settle down cyclically.

Global air cargo markets remained resilient, with **CTKs up ↑4,1%** (y/y) **in October** and **capacity rising ↑5,1%** (y/y). Growth persisted into November at **↑5%** (y/y), although Week 48 softened slightly (**↓3%**, w/w) due to the North American holiday effect. Regional performance was uneven, led by substantial gains in **Africa and Asia-Pacific**, while North and Latin America lagged. Rates continued to firm, reflecting improving demand fundamentals.

On the N4 corridor, movements decreased slightly for road transport, while reporting for rail transport was sparse. With the upcoming festive season, cargo movement across the border, as well as immigration on the South African side, remains a concern, as processing continues to be at a less-than-desired speed. Consequently, several instances of congestion were recorded this week. Truck volumes through the border post decreased to around **1 281 HGVs per day** (**↓5%**, w/w). Queue times increased slightly to an average of **~6,9 hours** at the border. The average processing time also increased slightly at an average of **~6,5 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 **15 minutes** from last week, while transit time increased by about **20 minutes**. The median border crossing times at South African borders decreased by roughly **three-quarters of an hour**, averaging **~12,0 hrs** (**↓6%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) increased by **nearly an hour**, averaging **~6,6 hrs** (**↑16%**). This week, on average, three SADC borders took around a day to cross, namely Beitbridge, Kasumbalesa (the worst affected, taking **more than three days** from the **Zambian side**), and Katima Mulilo. Operational developments include: **(1)** SA border performance deterioration, **(2)** queue management issues at Kazungula, **(3)** new overloading fee structure in Zambia, and **(4)** ASYCUDA update from Zambia Revenue Authority.

Finally, in closing off our reporting for the year, our attention shifts to the important developments with the **Pier 2 PSP implementation.** The private sector – having constantly pushed for competition, investment, and improved operating excellence – welcomes progress toward the new operating partnership and recognises its potential to unlock long-term capacity, investment and efficiency. However, delivery must now be anchored in transparency and measurable outcomes. As the private sector's core representatives, we reiterate our call for: **(1)** a clearly defined KPI framework across marine, terminal and landside interfaces; **(2)** transparent Terminal Handling Charge (THC) and tariff methodologies aligned to productivity and inflation; and **(3)** strong governance, investment oversight and recourse mechanisms to ensure accountability.

Early clarity on these matters will support confidence, protect competitiveness and enable the PSP to deliver the performance leap South Africa needs. What has indeed been a positive year concerning port and rail operations, the industry welcomes the collaborative efforts between Transnet and ICTSI to create this important new venture for our port environment. The opportunity is historic — and the responsibility equally profound. For this partnership to earn and sustain confidence, delivery must be evidenced not through promises, but through measurable outcomes, transparent reporting, time-bound investment rollout, and tariff discipline. South Africa cannot afford ambiguity or delay. Performance must be visible, verifiable and continuously accountable.

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 1 to 7 December (measured in TEUs)

7-day flow reported (01/12/2025 – 07/12/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 584	39 088	↑11%
New Pier (Pier 1)	2 220	15 539	↑74%
Cape Town Container Terminal	1 113	7 794	↓20%
Ngqura Container Terminal	1 710	11 969	↓3%
Port Elizabeth Container Terminal	321	2 249	↓12%
Other	903	6 318	↓7%
Total	**11 851**	**82 957**	↑10%

Source: Calculated from TPT, 2025. Updated 07/12/2025.

An average of **~11 851 TEUs** (↑10%) was handled per day for the last week (*1 to 7 December, Table 2*). Consequently, throughput was slightly above the projected average of **~11 174 TEUs** (↑6% actual versus projected).

For the coming week, a decreased average of **~11 174 TEUs** (↓6%) is predicted to be handled (*8 to 14 December*, *Table 3*).

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

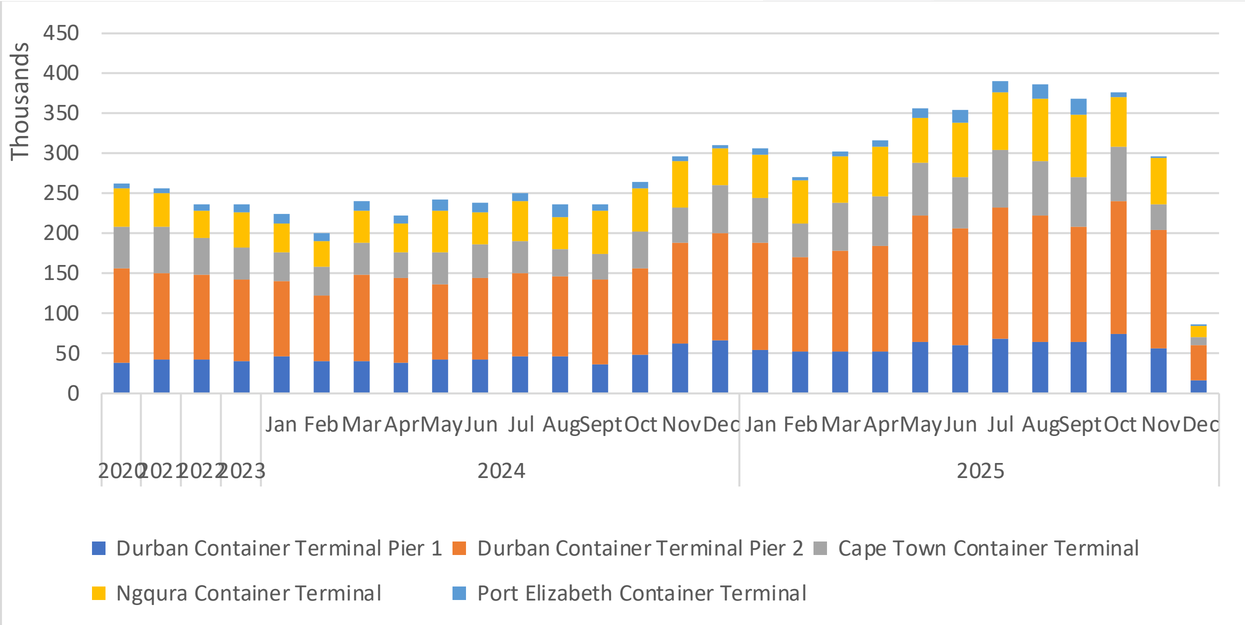
Table 3 – Container Ports – Weekly flow projected for 8 to 14 December (measured in TEUs)

7-day flow projected (08/12/2025 – 14/12/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 224	29 570	↓24%
New Pier (Pier 1)	1 620	11 337	↓27%
Cape Town Container Terminal	1 974	13 819	↑77%
Ngqura Container Terminal	2 010	14 070	↑18%
Port Elizabeth Container Terminal	393	2 753	↑22%
Other	952	6 666	↑6%
Total	**11 174**	**78 215**	↓6%

Source: Calculated from TPT, 2025. Updated 07/12/2025.

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)



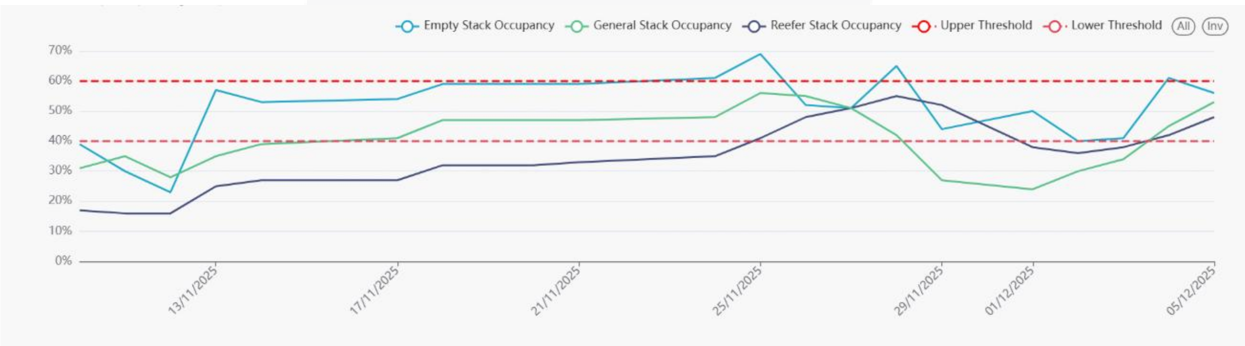
Source: Calculated from TPT, 2025, and updated 07/12/2025.

Figure 4 – Stack occupancy in DCT, general-purpose containers (8 November to present; day on the day)

Source: Calculated using data from Transnet, 2025, and updated 07/12/2025.

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 (8 November to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 07/12/2025.

b. TNPA: November update

TNPA has released consolidated port statistics for November[6], with the latest figures all pointing to a strong bounce back after a less-than-ideal month in October. In summary, the headline figures indicate that:

- Container throughput in November increased by **↑11%** (m/m) and annually by **↑4%** (y/y).
- Total bulk cargo increased monthly by **↑21%** (m/m), but decreased annually by **↓2%** (y/y).
- Vehicles decreased monthly by a substantial **↑54%** (m/m) and annually by **↑28%** (y/y).

The following table shows the respective changes versus October:

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

	Oct	Nov	Movement	% change
Containers (TEUs)	**329 164**	**365 764**	**36 600**	**11%**
Landed	158 615	194 810	36 195	23%
Shipped	170 549	170 954	405	0%
Dry bulk (MT)	12 316 151	15 240 344	2 924 193	24%
Liquid bulk (MT)	2 665 558	2 840 929	175 371	7%
Breakbulk (MT)	443 167	616 822	173 655	39%
Vehicles (Units)	61 311	94 213	32 902	54%
Total cargo (excl. Vehicles)	**15 424 876**	**18 698 095**	**3 273 219**	**21%**

Source: TNPA, updated 11/12/2025.

Transnet Port Terminals handled **366 thousand containers** and **18,7 million metric tonnes** of **bulk** cargo during November, which is significantly above the levels of the record throughput of last month. Vehicle throughput also increased substantially after last month's low number of **61 311 units** moved through our ports, coming in at **94 213 units**. Compared to yearly trends, the movement is much more aligned cyclically, with gains especially in containers imported (**↑11%**), as evidenced by the following table:

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

	2019	2024	2025	% 19 –'25	% '24-'25
Containers (TEUs)	**369 775**	**351 232**	**365 764**	**-1%**	**4%**
Landed	200 092	175 099	194 810	-3%	11%
Shipped	169 683	176 133	170 954	1%	-3%
Dry bulk (MT)	17 378 433	15 030 351	15 240 344	-12%	1%
Liquid bulk (MT)	3 919 990	3 379 413	2 840 929	-28%	-16%
Breakbulk (MT)	370 476	756 821	616 822	66%	-18%
Vehicles (Units)	70 865	73 803	94 213	33%	28%
Total cargo (excl. Vehicles)	**21 668 899**	**19 166 585**	**18 698 095**	**-14%**	**-2%**

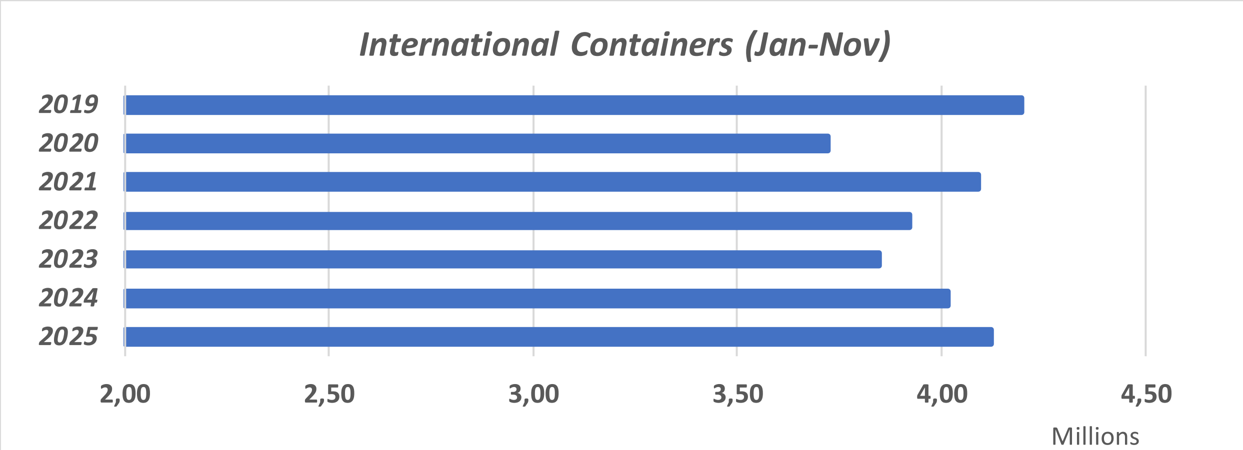
Source: TNPA, updated 11/12/2025.

Liquid bulk (**↓16%**, y/y) and breakbulk (**↓18%**) are down annually; whereas containers (**↑4%**), dry bulk (**↑1%**) and vehicle throughput (**↑28%**) have increased compared to November 2024. When reading the cyclical figures with the year-to-date figures (note *Figure 2*), the positive trend continues, as South Africa's bulk cargoes are up by **↑5% YTD**. However, despite the improved cyclical numbers, YTD port volumes remain

[6] Transnet. 2025. Port statistics.

down by ↓**5,3%** versus 2019. For containers, the YTD has improved to ↑**2,7%**, after being down by ↓**4,2%** just five months ago in June, as illustrated by the following year-to-date for containers to November:

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



Source: TNPA, updated 11/12/2025.

Projections point to the fact that the container sector will come just short of **4,5 million TEUs** for the year, which has resulted from some good improvements in the system, notably **(1)** new equipment, **(2)** improved processes across the marine, the quayside, and the landside, and **(3)** improved collaboration across the industry. Looking ahead, the anticipated transition to the NewCo at Pier 2 is expected to unlock a step-change in capacity, positioning the terminal to lift throughput well beyond the current 4,5 million-TEU horizon and align Durban with global performance benchmarks.

c. Summary of port operations

i. Weather and other delays

- More than 50 operational hours were conceded at the Port of Cape Town this week due to adverse weather.
- Adverse weather, system issues, as well as equipment breakdowns and shortages, prevented optimal performance in Durban.
- Vacant berths and adverse weather ensured operational delays at our Eastern Cape Ports.
- Adverse weather conditions and marine equipment challenges proved to be the primary operational constraints in Richards Bay.

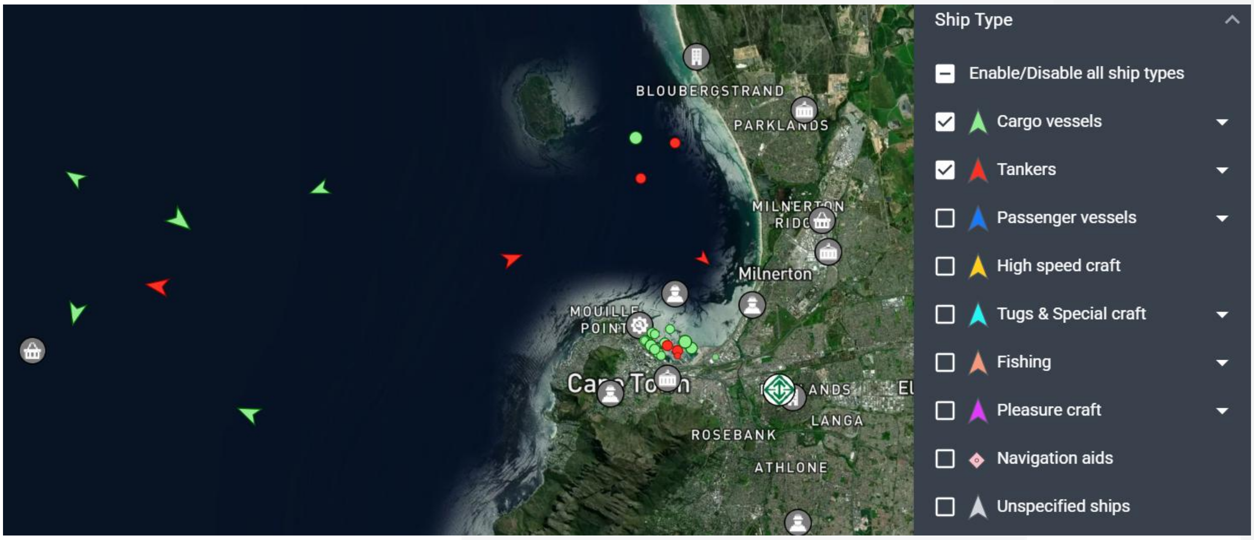
ii. Cape Town

On Friday, CTCT recorded three vessels at berth and three 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 50 operational hours this week due to adverse weather. On the landside, between Monday and Friday, the terminal managed to service around 2 812 trucks while handling approximately 312 rail units. On the waterside, the terminal executed approximately 4 067 container moves across the quay during the same period. Additionally, this week, the terminal had **7-8 STS cranes**, between **32 and 34 RTGs**, and approximately **59 hauliers** available.

On Friday, CTMPT had one vessel at berth, with zero vessels waiting at outer anchorage. In the previous 24 hours, the terminal managed to handle 399 container moves on the waterside, while servicing around 35 trucks on the landside. Stack occupancy figures were recorded at 28% for the general stack, 25% for the reefer stack, and 5% for the empty stack. Towards the end of the week, the terminal operated with three STS cranes and three straddle carriers.

Between 1 and 7 December, the FPT terminal handled eight vessels: two multi-cargo, one container, one breakbulk, two dry bulk, and two layby vessels. Berth occupancy during this period was recorded at 40%. The terminal planned to handle seven more vessels between 8 and 14 December, with another six vessels scheduled between 15 and 21 December. Adverse weather conditions and the late arrival of transporters accounted for the majority of delays experienced at the terminal.

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



Source: Marine Traffic. Updated 07/12/2025 at 14:00.

iii. Durban

On Friday, Pier 1 recorded one vessel at berth, with two vessels at anchor. Between Monday and Friday, the terminal executed at least 3 901 gate moves and 293 rail moves on the landside. The **TTT** for the week averaged **~49 minutes** (**↑26%**, w/w), and the average **staging time** was **~34 minutes** (**↑55%**). Additionally, the terminal moved over 5 000 TEUs across the quay on the waterside during the same period. The terminal had between **four and five** (out of seven) **STS cranes** and around **16-19** (out of 25) **RTGs** available for the most significant part of the week. STS crane availability thus roughly sat at 64% for the week, with RTG availability roughly sitting at 70%.

Pier 2 had four vessels on berth and four at anchorage on Friday, as equipment breakdowns and shortages prevented optimal operational performance this week. The terminal operated with **10** to **11 gangs** and moved over **18 100** containers across the quay between Monday and Friday on the waterside. Approximately **14 732** gate moves were executed on the landside during the same period. The **average TTT** for the week was to **~93 minutes** (**↓15%**, w/w), and the average staging time was **~103 minutes** (**↓25%**). Approximately 1 467 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **60** and **63** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **57%** during this period.

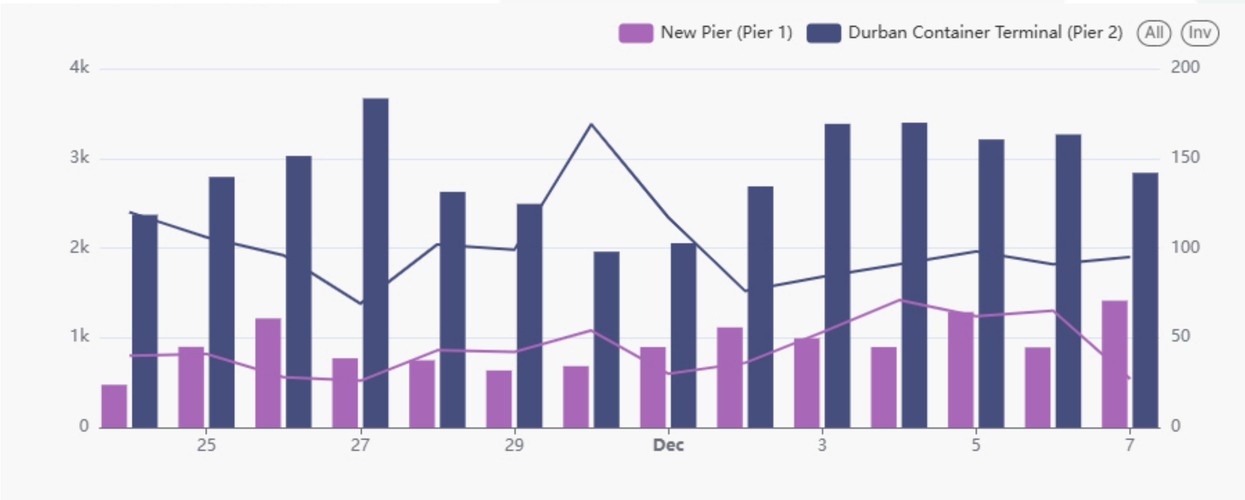
Durban's MPT terminal recorded two vessels at berth on Friday and none at outer anchorage. Stack occupancy for containers was recorded at 19%, and the breakbulk stack at 95%. In the preceding 24 hours, 329 containers and 2 765 tons of breakbulk were handled on the waterside. On the landside, 165 container trucks were serviced at a TTT of ~24 minutes. Additionally, 110 breakbulk trucks were serviced during this period, containing approximately 2 758 tons. During this period, two cranes, nine reach stackers, eight forklifts, and 17 ERFs were in operation. The latest reports suggest that the third crane remains out of commission but is anticipated to return to operations before the weekend. Additionally, the ETR of the fourth crane was revised to mid-March 2026.

Between Tuesday and Wednesday, Maydon Wharf MPT recorded one berthed vessel and zero at outer anchorage. The terminal managed to move approximately 3 823 tons across the quay on the waterside during this period, while servicing around 28 trucks and 15 rail wagons on the landside. During the same period, the Agri-bulk terminal had one vessel on berth but none at anchorage. On the waterside, the terminal managed to handle approximately 5 223 tons across the quay, while no volumes were handled on the landside.

On Thursday, the Ro-Ro terminal in Durban recorded zero vessels on the berth, with none at anchorage. The next vessel is expected to arrive around 5 December. In the preceding 24 hours, the terminal handled 2 546 road units and 197 units on rail on the landside, while 3 026 units were handled on the waterside. Overall stack occupancy was recorded at 60%, with 40% recorded at Q+R and 50% at G-berth. The terminal had 177 abnormal loads and managed to handle 33.

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.

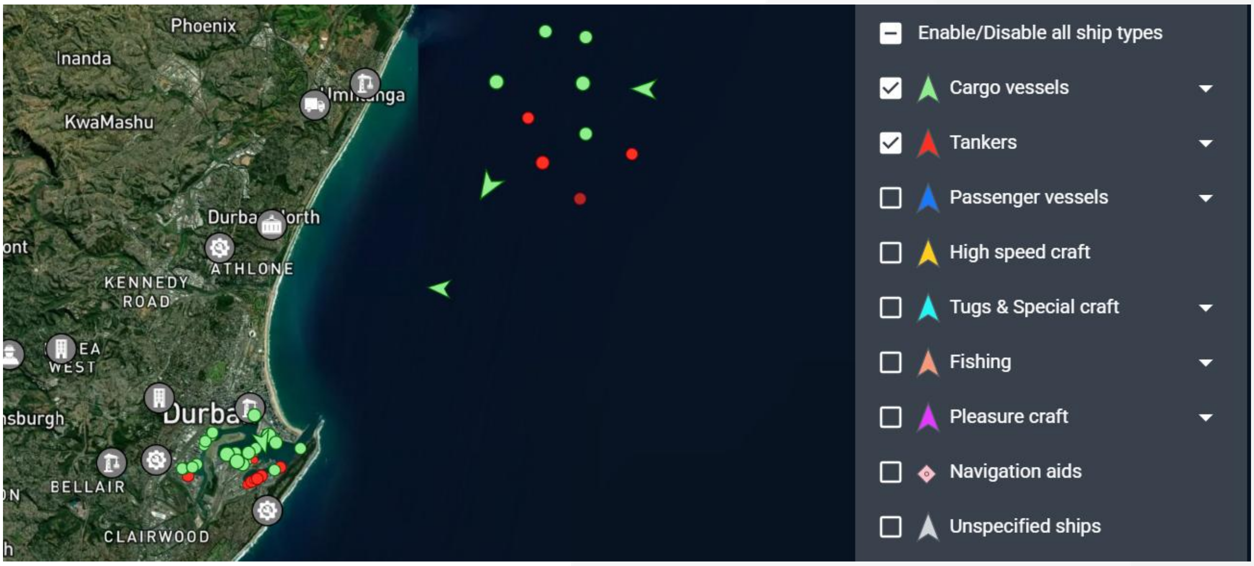
Figure 8 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 07/12/2025.

The queue of container vessels waiting outside Durban has decreased significantly this week. On Monday evening (8 December), **one** container vessel was waiting outside at anchorage for Pier 1, **none** for Pier 2, and **one** for Point. The queue of dry (**eight**), liquid (**seven**), and breakbulk (**five**) vessels, on the other hand, has increased substantially from last week. The following snapshot shows the current status quo:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 07/12/2025 at 14:00.

iv. Richards Bay

On Friday, the Port of Richards Bay had 19 vessels at anchor and 13 on the berth, translating to four vessels at DBT, four at MPT, four at RBCT, zero 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 and marine equipment challenges proved to be the primary operational constraints at the port this week.

The daily average coal throughput for the week increased significantly again and averaged around **175 000 tons** (**↑35%**, w/w) a day. An average of **19 trains** was serviced on the landside (down by **one** from last week), and slightly below the target (of 22 trains).

v. Eastern Cape ports

On Wednesday, NCT recorded two vessels on berth and none at anchor, with one vessel drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. Stack occupancy figures were recorded at 32% for reefers and 22% 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 2 212 TEUs and 96 reefers on the waterside. Approximately 712 trucks were processed on the landside at a TTT of ~28 minutes. For the most significant part of the week, the terminal had between 3 and 7 STS cranes, between 21-25 RTGs, and around 28-45 hauliers in service.

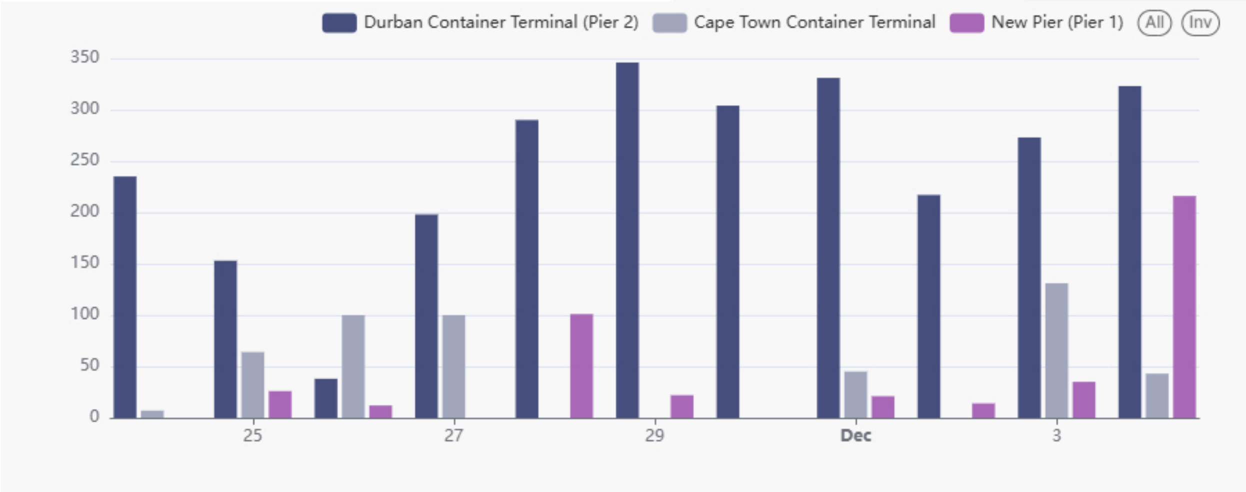
PECT recorded zero vessels on the berth and zero at the outer anchorage on Thursday. In the preceding 24 hours, the terminal managed to handle approximately 229 TEUs and nine reefers on the waterside. On the landside, the terminal managed to service around 13 trucks at a TTT of ~17 minutes. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and 11 straddles available.

This week, the Ro-Ro terminal did not have any vessels calling the terminal, with the next vessel only expected to arrive around the weekend.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that the annual shutdown of the ConCor line concluded last week, with trains resuming operations on the rail network. No major incidents were reported on the ConCor this week; however, some locomotive failures prevented optimal rail performance on the line between City Deep and Mafikeng. Additionally, towards the end of the week, DCT Pier 2 had 96 ConCor units on hand with a dwell time of 48 hours and 487 over-border units with a dwell time of 99 days.

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



Source: Calculated using data from Transnet, 2025. Updated 07/12/2025.

In the last week (*1 to 7 December*), rail cargo on the ConCor line out of Durban was reported at **2 824** containers, up by **↑53%** from the previous week's **1 725** containers.

vii. Other updates

The latest reports from Maersk and Hapag-Lloyd confirm that East-West Suez transits remain suspended due to Red Sea security concerns. Additionally, Maersk will revise Origin and Destination Documentation Fees, as well as Import and Export Service charges for shipments to/from South Africa and neighbouring countries, with effect from 1 January 2026 until further notice.

According to the latest Southern Africa Terminal and Service Update for Week 50, most major South African terminals, such as CTMPT, NCT, PECT, and DCT Pier 2, recorded zero waiting times. Conversely, waiting times at CTCT are currently sitting between 2 and 3 days, with waiting times at DCT Pier 1 recorded at 0 and 5 days. In terms of our immediate neighbours, waiting time at Port Reunion is currently sitting at four days due to strike action taking place, with waiting times at Beira (Mozambique) being 15 days due to adverse weather. Walvis Bay (Namibia), Maputo (Mozambique), Port Louis (Mauritius), and Toamasina (Madagascar) all recorded waiting times below one day.

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 (*1 to 7 December*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *November 2024* averaged **~987 000 kg**.

Table 6 – International inbound and outbound cargo from OR Tambo

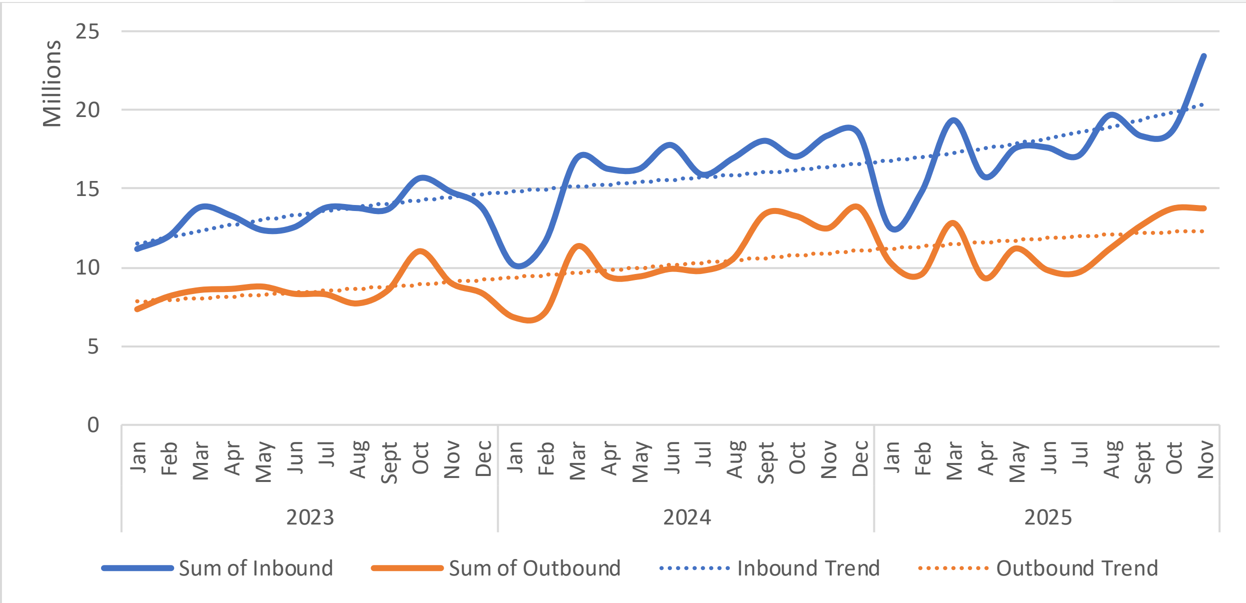
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	**517 023**	**3 619 163**	**↓25%**
Volume outbound	**435 027**	**3 045 189**	**↑4%**
Total	**952 050**	**6 664 352**	**↓16%**

Courtesy of ACOC. Updated: 07/12/2025.

International air cargo to South Africa were significantly reduced this week. The daily average of air cargo handled amounted to **~517 000 kg** inbound (**↓25%**, w/w) and **~435 000 kg** outbound (**↑4%**). Despite the reduction, the current levels continue to trend significantly above last year's level (**~↑14%**) and the comparative levels of pre-pandemic 2019 (**~↑14%**), as volumes in December typically settle down cyclically.

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

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

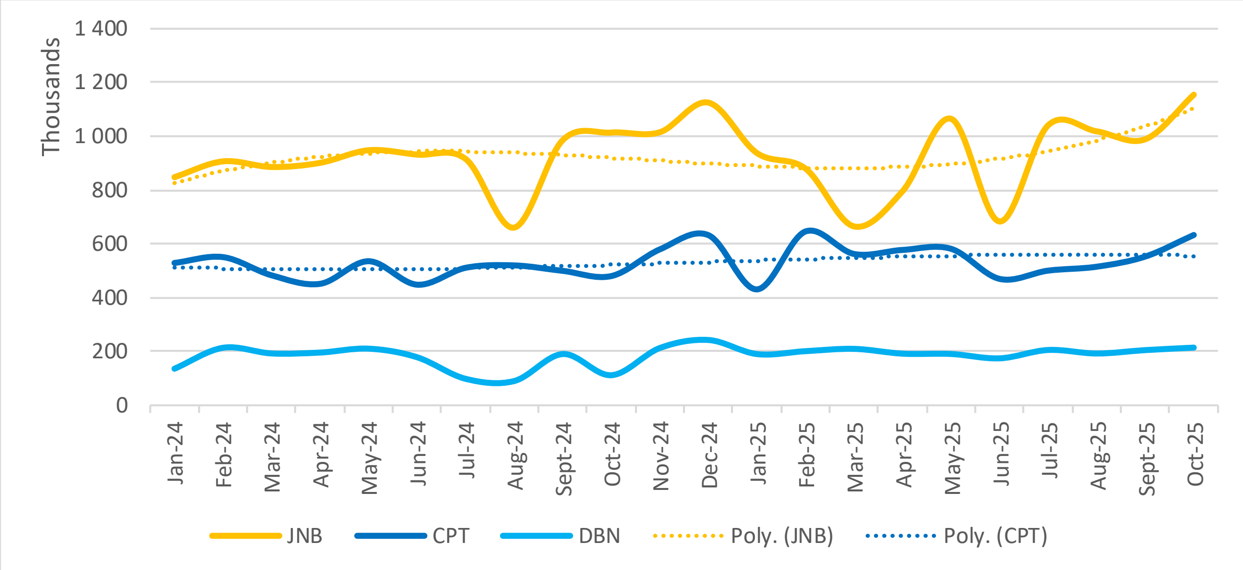


Calculated from ACOC. Updated: 07/12/2025.

b. Domestic air cargo

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

Figure 12 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 07/12/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*1 to 7 December)*, movements along the N4 corridor decreased slightly for road transport, while reporting for rail transport was sparse. With the upcoming festive season, cargo movement across the border as well as immigration on the South African side remains a concern, as processing continues to be at a less than desired speed. Consequently, several instances of congestion was recorded this week.

- Truck volumes through the border post decreased to around **1 281 HGVs per day** (**↓5%**, w/w).
- Queue times increased slightly to an average of **~6,9 hours** at the border.
- The average processing time also increased slightly at an average of **~6,5 hours** per crossing.

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
Average	1 281	1 270	884	221	44	73	46	248	0	n/a	1	n/a
% (w/w)	**-5%**	**-7%**	**-10%**	**0%**	**16%**	**-23%**	**7%**	**-17%**	**0%**	**n/a**	**0%**	**n/a**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 07/12/2025.

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 07/12/2025 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 **15 minutes** from last week, while transit time increased by about **20 minutes**.
- The median border crossing times at South African borders decreased by roughly **three-quarters of an hour**, averaging **~12,0 hrs** (**↓6%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by **nearly an hour**, averaging **~6,6 hrs** (**↑16%**).

1. **South Africa – border performance deterioration:**
   a. **Longer queues and crossing times** reported at **Beitbridge, Skilpadshek, and Groblersbrug** over recent weeks.
   b. SARS will introduce **extended operating hours** at **Skilpadshek, Groblersbrug, and Kopfontein** before year-end, in response to rising congestion.
   c. Transporters again highlight the **absence of a formal festive-season SOP**, a recurring challenge each year.
2. **Kazungula – queue management issue:**
   a. FESARTA intervened after Botswana Police halted a compliant driver despite **verified documentation**.
   b. Several similar incidents occurred the same day but were **resolved following FESARTA's engagement** with authorities.
3. **Zambia – new overloading fee structure:**
   a. A 5% axle tolerance and **499 kg GVM tolerance** now apply.
   b. When overloaded, **cargo must be redistributed**; charges apply on the excess margin.
   c. If redistribution is impossible, authorities will impose a **mileage-based fine**, calculated to the exit border for transit loads.
4. **ZRA – ASYCUDA world access update:**
   a. From **30 November**, the **new Desktop Launcher** is mandatory.
   b. The **old launcher is disabled**, and traders must download the updated version to retain system access.

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

Table 8 – Delays[7] summary – South African borders[8] (both directions)

Border Post	Direction	HGV[9] 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	554	31,4	8,2	31,0	16 620	3 878
Beitbridge	Zimbabwe-SA	293	11,5	2,2	11,3	8 790	2 051
Groblersbrug	SA-Botswana	241	22,3	2,4	22,2	7 230	1 687
Martin's Drift	Botswana-SA	177	9,9	1,2	9,5	5 310	1 239
Kopfontein	SA-Botswana	233	13,9	3,4	13,6	6 990	1 631
Tlokweng	Botswana-SA	24	0,6	0,2	0,4	720	168
Vioolsdrift	SA-Namibia	30	3,9	1,3	3,5	900	210
Noordoewer	Namibia-SA	20	1,8	0,4	1,5	600	140
Nakop	SA-Namibia	30	4,4	1,0	4,2	900	210
Ariamsvlei	Namibia-SA	20	1,0	0,3	1,0	600	140
Skilpadshek	SA-Botswana	359	11,9	2,4	11,5	10 770	2 513
Pioneer Gate	Botswana-SA	70	0,0	0,0	0,0	2 100	490
Ramatlhabama	SA-Botswana	215	3,3	0,5	3,2	2 070	483
Ramatlhabama	Botswana-SA	69	0,5	0,1	0,3	6 450	1 505
Lebombo	SA-Mozambique	1 349	6,9	2,1	6,5	40 470	9 443
Ressano Garcia	Mozambique-SA	1 319	2,5	0,3	2,3	39 570	9 233
Sum/Average		**5 003**	**7,9**	**1,6**	**7,6**	**150 090**	**35 021**

Source: TLC, FESARTA, & Crickmay, week ending 30/11/2025.

Table 9 – 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	4,2	12,8	9 600	2 240
Central Corridor	798	1,0	0,0	1,0	23 940	5 586
Dar Es Salaam Corridor	1 819	18,4	3,3	18,4	45 570	10 633
Maputo Corridor	2 668	4,7	1,2	4,4	80 040	18 676
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 222	16,4	3,4	16,2	96 660	22 554
Northern Corridor	2 817	0,8	0,2	0,8	92 520	21 588
Trans Caprivi Corridor	1 000	4,1	0,9	4,0	30 000	7 000
Trans Cunene Corridor	100	2,8	0,8	2,6	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700
Trans Oranje Corridor	116	18,5	2,8	18,5	3 480	812
Sum/Average	**13 087**	**7,3**	**1,5**	**7,2**	**391 620**	**91 378**

Source: TLC, FESARTA, & Crickmay, week ending 30/11/2025.

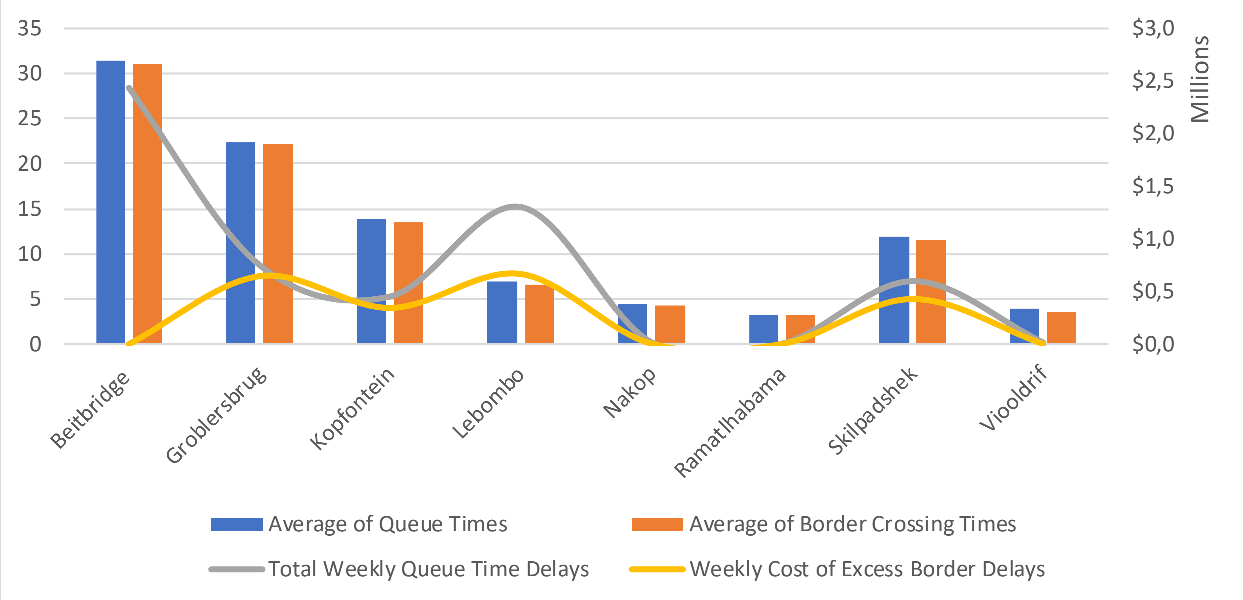
The following graph shows the weekly change in cross-border times and associated estimated costs:

[7] 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.

[8] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.

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

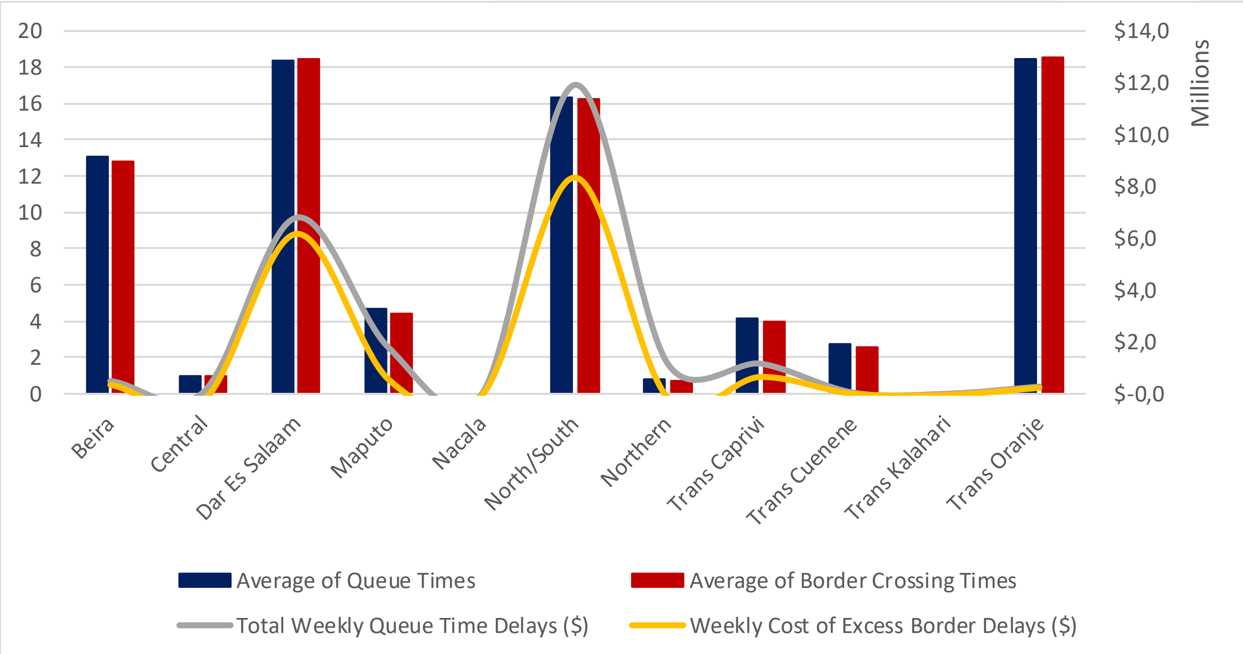
Figure 14 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 30/11/2025.

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

Figure 15 – Weekly cross-border delays & estimated cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 30/11/2025.

In summary, cross-border queue time averaged **~7,3 hours** (up by **~0,2 hours** from the previous week's **~7,1 hours**), indirectly costing the transport industry an estimated **$23,7 million** (**R404 million**). Furthermore, the week's average cross-border transit times also hovered around **~7,2 hours** (up by **~0,3 hours** from the **~6,9 hours** recorded in the previous report), at an indirect cost to the transport industry of **$15,8 million** (**R269 million**). The total indirect cost for the week amounts to an estimated **~$39,4 million** (**R674 million**, up by **↑6,9%** from the **~R630 million** in the previous report).

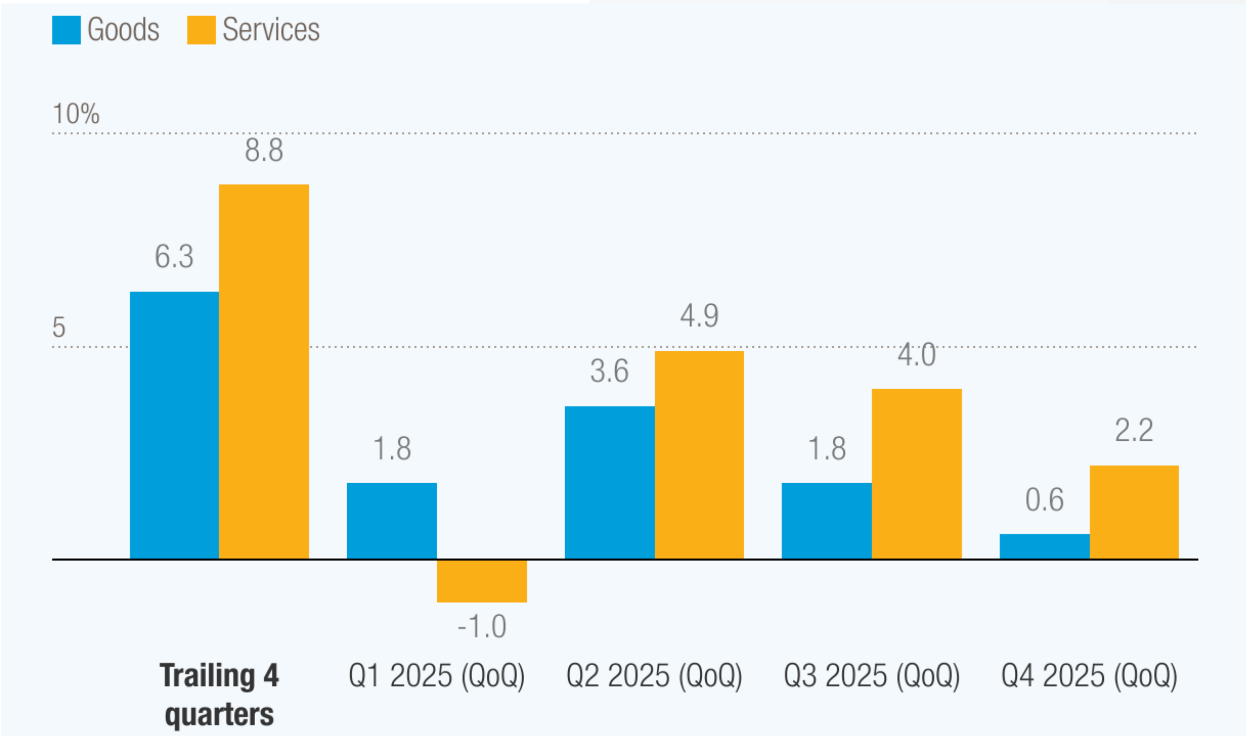
4. International Update

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

a. Global trade

UNCTAD's *Global Trade Update* projects that global trade in goods and services will surpass **$35 trillion** in 2025, marking an approximate **↑7%** annual increase (**~$2,2 trillion**) compared with 2024 if current estimates hold. This growth continues through the second half of the year, with goods contributing roughly **$1,5 trillion** and services about **$750 billion** to the overall expansion. While momentum persists into Q4, growth is expected to moderate – projected at approximately **↑0,5%** for goods and **↑2%** for services. Importantly, after earlier increases driven partly by price inflation, trade growth is expected to be volume-led as goods prices decline, signalling resilient underlying demand.

Figure 16 – Trade value in goods and services (q/q)



Source: *UNCTAD*

Regionally, **East Asia and Africa exhibited the strongest export and import growth**, and **South–South trade expanded around ↑8%**, illustrating a shift toward diversified and intra-regional flows. Sectoral patterns reveal robust manufacturing growth, led by electronics, and solid agricultural trade, while automotive and fossil-fuel sectors lag. Persistent **trade imbalances remain elevated**, and geopolitical fragmentation, including friendshoring and nearshoring, continues to reshape global trade patterns. Looking ahead, UNCTAD highlights **risks to 2026 growth** owing to slower global expansion, higher trade costs, and policy uncertainty.

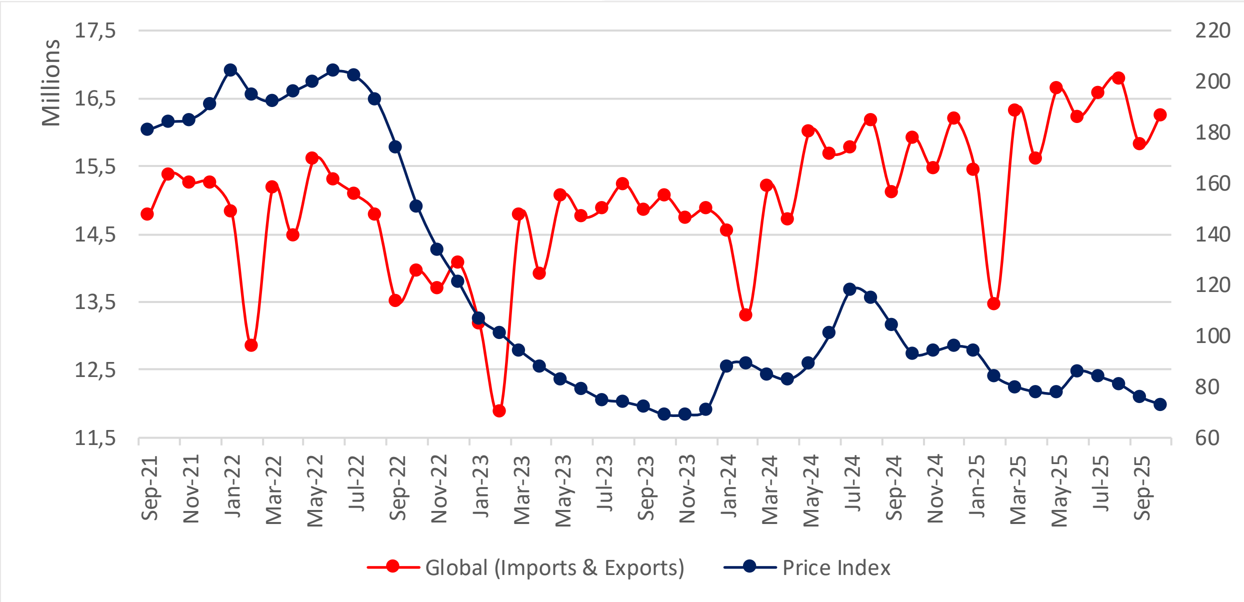
b. Global shipping industry

i. Global container trade statistics for October

The latest container throughput figures from *Container Trade Statistics* (CTS) show that container volume increased slightly in October and is also up versus the corresponding period last year. The total throughput is up by **↑2,8%** monthly and up by **↑2,1%** (y/y) annually. Regionally, it was a mix, as some trade lanes experienced increases in October (notably Far East imports at **↑10,1%** and European exports at **↑4,3%**, respectively.

The global price index (dry and reefer combined) decreased again in October by **↓3,9%** monthly and remains significantly down by **↓22%** yearly. Collectively, the following figure illustrates the global container throughput and price index in the last four years:

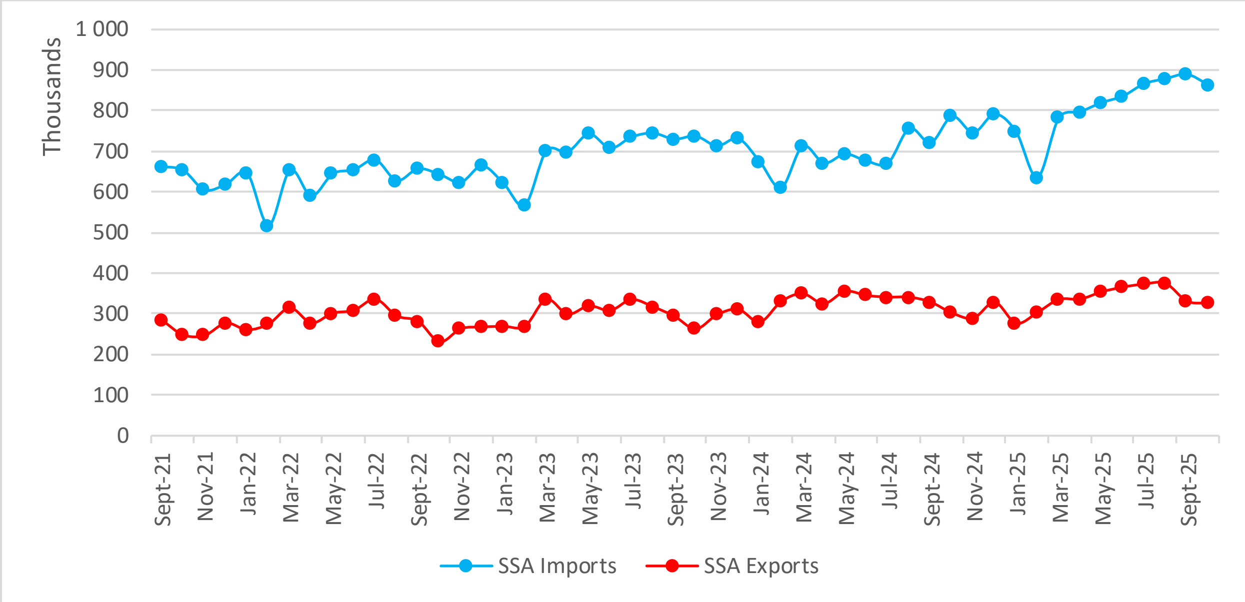
Figure 17 – Global Containerised Throughput (TEUs) and price index



Source: Calculated from CTS

Throughput in October reached **16,3 million TEUs** – some **500 thousand containers** below the record level achieved last in August this year. The following figure shows Sub-Saharan African trade over the same period, with a **↓2,9%** (m/m) increase in containers imported, and a **↓1,5%** (m/m) decrease in containers exported:

Figure 18 – Sub-Saharan Africa Containerised Throughput (TEUs)



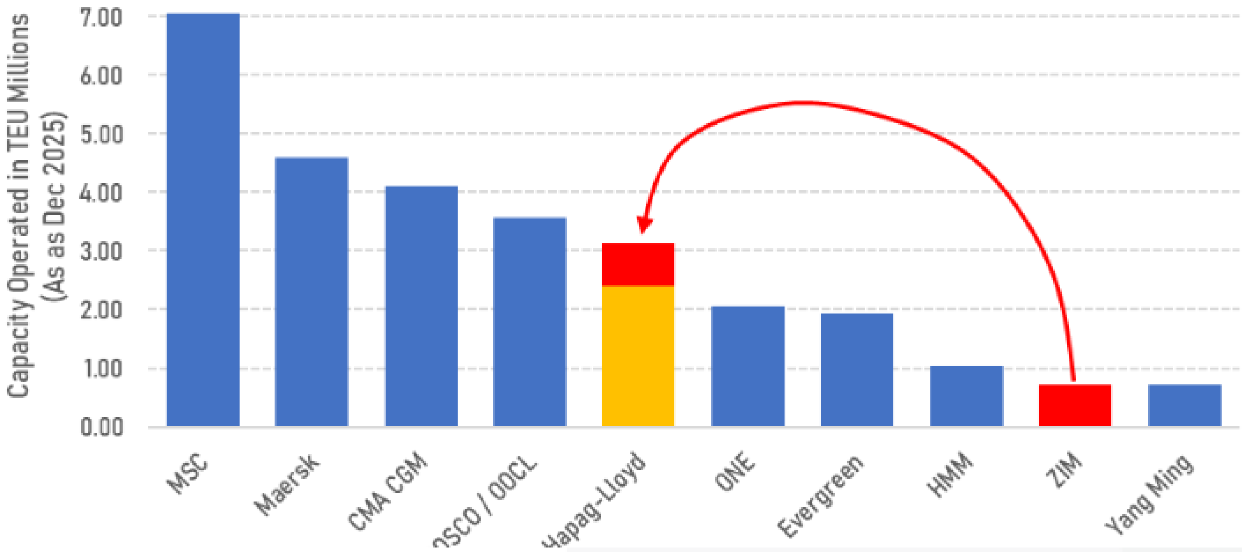
Source: Calculated from CTS

Despite the slight drop in bi-directional trade, the longer-term trend has been overwhelmingly positive across the last four years. Indeed, yearly SSA imports remain significantly up (**↑9,9%**, y/y) – with exports up by **↑8,0%** (y/y). All in all, as the year draws to a close, global container indices indicate that the 2025 worldwide container forecast will likely fall within the **↑3,2%-4%** range.

ii. Container industry summary

The Week 49 *Linerlytica* report highlights persistent **downward pressure on freight rates**, as carriers were unable to enforce planned general rate increases amid weak demand relative to supply. Container demand (measured in TEU-miles) remains below capacity growth, contributing to a **looming multi-year oversupply challenge**. The global orderbook has reached a **record 11,5 million TEU**, with **4,5 million TEU** scheduled for delivery in 2028, emphasising continued fleet expansion despite market headwinds. The potential **strategic sale of Israeli carrier ZIM** over the next six months faces geopolitical and valuation hurdles, with bids from Hapag-Lloyd and interest from MSC and Maersk, and union opposition complicating prospects. The following graph illustrates how the top 10 market dynamics will shift if the sale to Hapag-Lloyd goes through:

Figure 19 – Top 10 carrier capacity

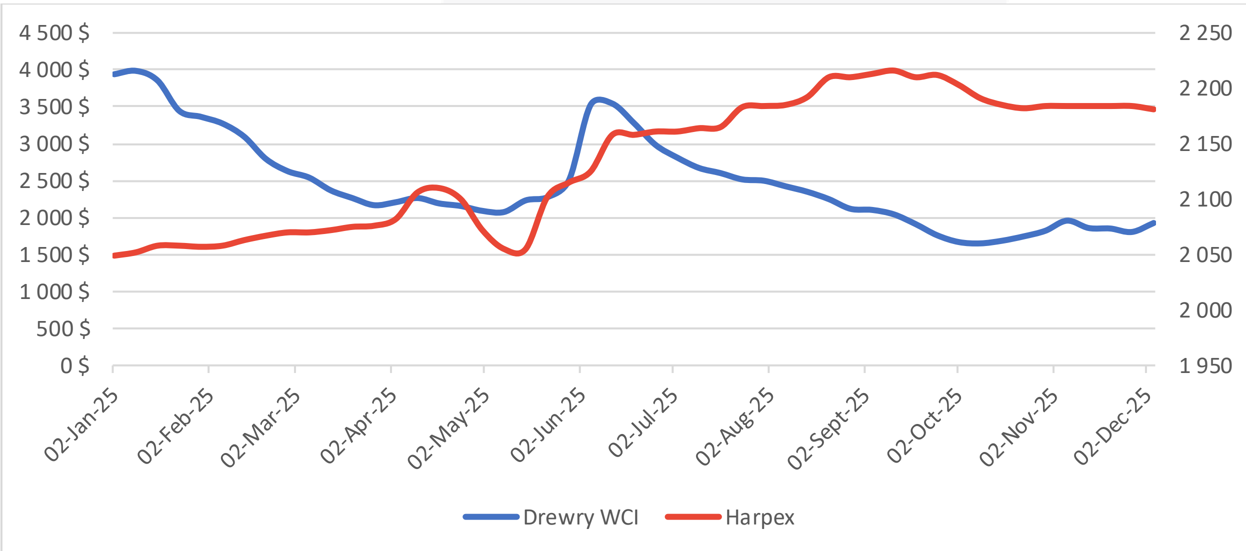


Source: Linerlytica

iii. Global freight rates and carrier profits

Global freight rates increased for the first time in four weeks, with the "*World Container Index*" (WCI) up by **↑6,7%** (or **$121**) to **$1 927 per 40-ft container.**[10] The most notable increases were to the US, with spot rates from Shanghai to Los Angeles climbing **↑8%** to **$2 256**, while those to New York rose **↑6%** to **$2 895**. Elsewhere, the charter market remains stable, with the *Harpex Index* trading at **2 181 points.**[11] The following shows the respective indices for the *year-to-date*:

Figure 20 – World Container Index (WCI) & Harpex Charter Index



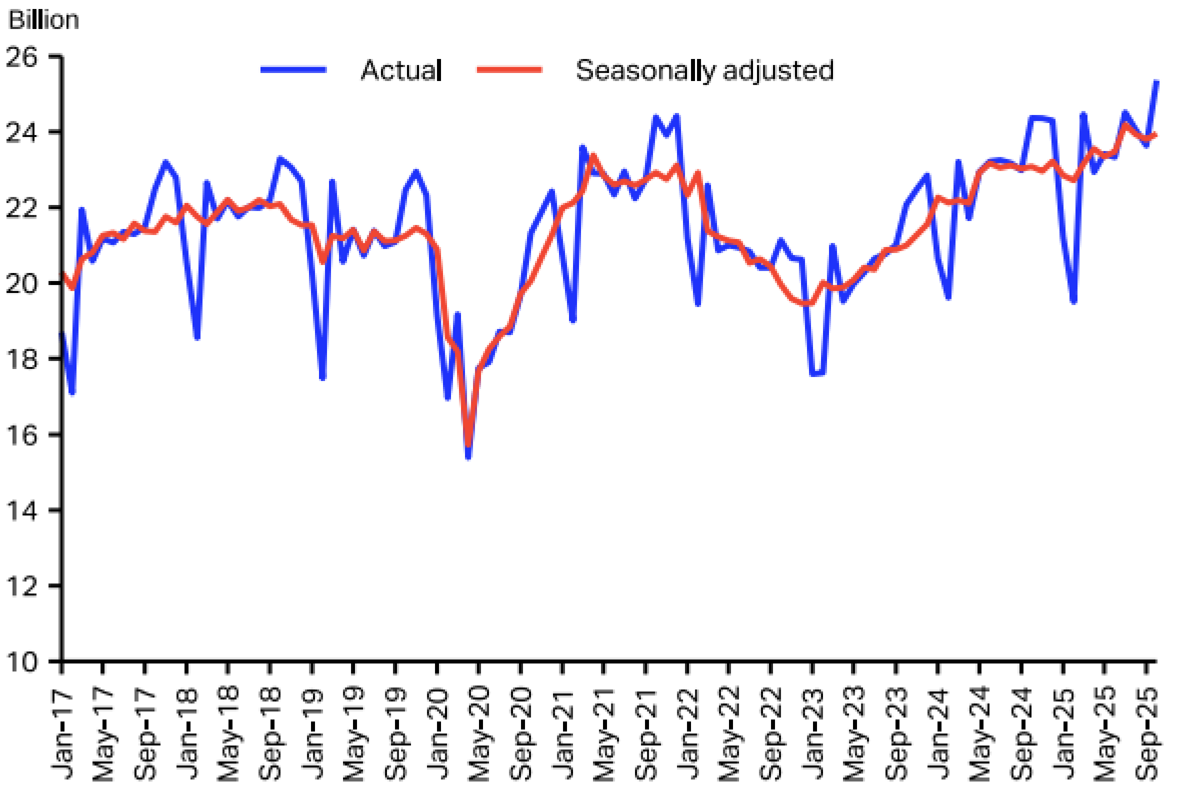
Source: Calculated from Drewry & Harpex

[10] Drewry. 04/12/2025. World Container Index.
[11] Harpex. 05/12/2025. Harper Petersen Charter Rates Index.

c. Global air cargo industry

The latest IATA "*Air Cargo Market Analysis*" for October, global air-cargo demand (CTKs) increased by **↑4,1%** (y/y), reaching a record monthly high, while capacity (ACTKs) rose by **↑5,1%** (y/y). International ACTKs increased by even more, and were up by **↑6,4%**. Load factor (CLF) dipped **↓0,5%** to **47,1%**, reflecting capacity outpacing demand. Regionally, Africa (**↑16,6%**) and Asia-Pacific (**↑8,3%**) led CTK growth, while Europe (**↑4,3%**) and the Middle East (**↑5,7%**) posted moderate gains. In contrast, North America and Latin America reported **↓2,7%** declines in demand despite modest capacity increases.

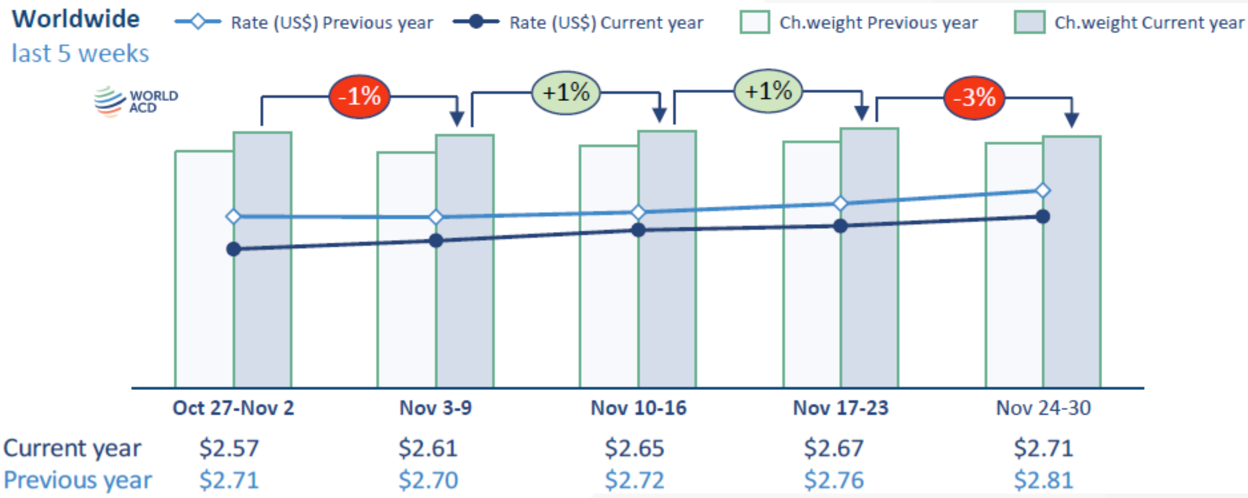
Figure 21 – Industry CTKs, billion



Source: [*IATA*]

According to high-frequency metrics from World ACD, global air cargo tonnages rose **↑5%** (y/y) in November, continuing steady Q4 growth. Asia Pacific, MESA, and Central and South America led expansion, while capacity grew **↑4%** (y/y). However, Week 48 volumes dipped **↓3%** (w/w), driven by a **↓15%** drop ex-North America due to *Thanksgiving*. Ex-North America markets softened slightly (MESA **↓2%**, CSA **↓2%**, Europe **↓1%**), while Asia Pacific remained flat. Rates increased **↑1%** (w/w), continuing seasonal firming, with spot prices up **↑3%** (w/w), though still **↓6%** (y/y). Regional dynamics show strong Southeast Asia–US demand, in contrast to softer China/Hong Kong flows to the US and firmer lift into Europe.

Figure 22 – Worldwide rates & chargeable weight (past five weeks)



Source: World ACD

ENDS [12]

[12] **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 and associations in compiling these reports, which have become a weekly industry staple.*