

Cargo Movement Update #250¹

Date: 7 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)	48 187	54 899	103 086	45 294	51 602	96 896	↑6%
Air Cargo (tons)	4 363	2 490	6 853	4 140	2 592	6 732	↑2%

Monthly Snapshot

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

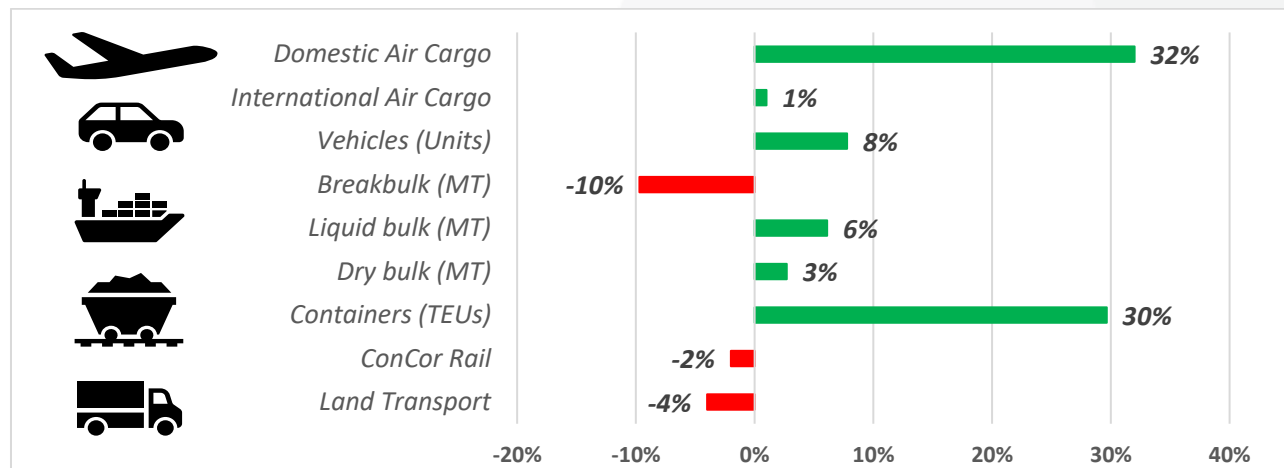
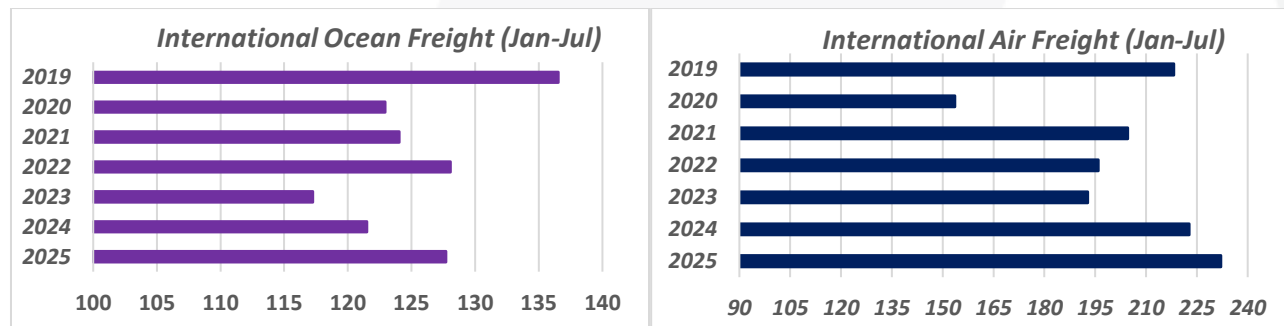


Figure 2 – Year-to-date flows 2019-2025⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~14 727 TEUs was handled per day, with ~12 581 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 2 756 containers, down by ↓17% from last week.
- Cross-border queue: ↓0,3 hrs; transit: ↑0,1 hrs; SA borders: ~10,3 hrs (↓11%); SADC: ~5,7 hrs (↑4%).
- Global TEU throughput in July is up by ↑3,0% (m/m) and ↑5,1% (y/y). Price index (dry & reefer): ↓2,3%.
- Global spot rates declined by another ↓0,7% (or \$15) to \$2 104/40ft. Rates remain down by ↓56% (y/y).
- Global air cargo markets remained mixed in late August (but still ↑3% y/y), as rates averaged \$2,44/kg.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 250th 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: July vs July.

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, another record average of **14 727 TEUs** was handled daily (eclipsing the previous record week ending 20 July by **↑1,7%**), an increase from **13 842 TEUs** the previous week.

Despite the record throughput, some operational matters still constrained fluidity. These include inclement weather, vacant berths, as well as equipment breakdowns and shortages. Several operational hours were conceded in Cape Town due to adverse weather conditions and vacant berths, while strong winds, equipment breakdowns, and congestion ensured operational disruptions in Durban. Agent delays, vacant berths, and inclement weather resulted in operational delays at our Eastern Cape Ports, as minimal delays were reported at the Port of Richards Bay this week. The latest reports from TFR suggest that delays are still being experienced on the line between City Deep and Mafikeng due to ongoing cable theft and diesel hauling. Towards the end of the week, the taxi industry had a strike in Durban, which subsequently impacted operations at the port.

Global trade flows remained buoyant in July, with container throughput up to near record levels, supported by strong import growth in the Indian Sub-Continent and the Middle East, while North American trade continued to lag. Sub-Saharan Africa showed robust momentum, with South African volumes up **↑30%** (y/y). On the supply side, carriers are deploying blank sailings ahead of Golden Week, though capacity discipline remains weak, keeping freight rates under pressure. European port market shares are shifting with alliance reshuffles, and new vessel orders continue to outpace scrapping. Other developments of note include **(1)** US trade policy developments took centre stage as the Supreme Court fast-tracked a review of tariff legality, and **(2)** operational risks were highlighted by the loss of 67 containers at Long Beach.

In the air cargo industry, the daily average of air cargo handled at ORTIA amounted to **~623 000 kg** inbound (**↑5%**, w/w) and **~356 000 kg** outbound (**↓4%**). The current levels indicate that cargo is still trending above last year's level (**~↑4%**, y/y, and slightly above the comparative levels of pre-pandemic 2019 (**~↑5%**).

Operationally, the air cargo industry continues to face headwinds as critical issues with ACSA remain unresolved, including warehouse leases, the cargo precinct upgrade, and the long-awaited midfield terminal. Frustration among stakeholders is mounting, as engagement with ACSA's leadership has yet to materialise, leaving the sector feeling overlooked despite its strong recent performance.

Internationally, air cargo markets remained mixed in late August, with chargeable weight still up on last year, but rates under pressure. Asia, Europe, and Africa posted gains, while North America declined. Rising capacity is balancing demand, though tariff-driven weakness in China-US e-commerce flows is weighing on growth, and airline on-time performance slipped to **77%**.

Cargo movements along the N4 corridor decreased for road transport and increased for rail transport. Truck volumes through the border post decreased to **1 521 HGVs per day** (**↓10%**, w/w). Queue times increased to an average of **4,9 hours** (**↑17%**) at the border. The average processing time also increased to an average of **4,1 hours** (**↑12%**) per crossing. The rail to Maputo increased to an average of **ten trains daily** (up by **five** from last week). Sugar trains from Eswatini were also stable at around **one train a day**.

Land border crossing times – on average – were mainly stable across the SADC region. Overall, the average queue time decreased by approximately **20 minutes** from last week, while transit time increased by about **10 minutes**. The median border crossing times at South African borders decreased by more than **an hour**, averaging **~10,3 hrs** (**↓11%**) for the week. In contrast, the greater SADC region (excluding South African-

controlled) increased by around **10 minutes**, averaging **~5,7 hrs (↑4%)**. This week, on average, two SADC borders took around a day to cross, namely Kasumbalesa (the worst affected, taking around **two days** from the **Zambian side**), and Zobue/Mwanza OSBP. Other developments of note include **(1)** ZIMRA permit confusion, **(2)** Anti-smuggling enforcement in Zimbabwe, **(3)** system downtime and declaration matters at Kazungula, and **(4)** truck scanning at Kasumbalesa.

In summarising this edition, a landmark 250th one, we zoom in on Transnet's Financial Year-end results, reported on Friday. Encouragingly, throughput performance improved across all key sectors – a commendable outcome reflecting progress in stabilising operations. We have, indeed, arrested the decline. The main headlines show a rail volume of **160,1 Mt**, port containers of **4,09 million TEUs**, pipeline volumes of **13,37 bn litres**, and auto of **803 908 units**. However, the figures also show that Transnet fell short of most of its primary targets, accentuating the significant distance still to be travelled in rebuilding network reliability and efficiency over the medium to longer term.

On the financial side, the narrowing of losses is welcome (**↓74% to R1,9 billion**), yet high debt levels, irregular expenditure, and ongoing legal disputes remain causes for concern. Against this backdrop, industry stakeholders are reassured by the substantial increase in capital expenditure (**↑44,2% to R24,0 billion**), particularly the investment in port equipment and infrastructure – a necessary step towards restoring confidence and competitiveness in our ports. The results come at a time when real gross domestic product (GDP) increased by **↑0,8%** in Q2, as the importance of trade, transport and logistics as an enabler to economic growth is further apparent. In conclusion, it is essential to note that these results reflect the position at 31 March 2025. Since then, further operational improvements (especially in the container industry) have been achieved, strengthening momentum for a much-improved FY 2026.

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).....	11
vii. Transnet financial results FY2025	11
viii. Taxi strike	12
2. Air Cargo Update	13
a. International air cargo	13
b. Domestic air cargo	14
3. Road and Regional Update	14
a. Lebombo border post update.....	14
b. SADC cross-border and road freight update.....	15
4. International Update	18
a. Global shipping industry	18
i. Global container trade statistics for July and Port Throughput Index.....	18
ii. Container industry summary	20
iii. Global freight rates	20
iv. Further developments of note.....	21
b. Global air cargo industry	22

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 September (measured in TEUs)

7-day flow reported (01/09/2025 – 07/09/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 055	35 386	↓6%
New Pier (Pier 1)	2 255	15 784	↓5%
Cape Town Container Terminal	2 348	16 434	↑16%
Ngqura Container Terminal	3 307	23 151	↑16%
Port Elizabeth Container Terminal	912	6 381	↑84%
Other	850	5 950	↑12%
Total	14 727	103 086	↑6%

Source: Calculated from TPT, 2025. Updated 07/09/2025.

A record average of ~**14 727 TEUs (↑6%)** was handled per day for the last week (1 to 7 September, Table 2). Again this week, throughput was above the projected average of ~**12 581 TEUs (↑17%** actual versus projected).

For the coming week, a decreased average of ~**12 026 TEUs (↓18%)** is predicted to be handled (8 to 14 September, Table 3).

Despite another substantial increase in throughput, port operations were characterised by inclement weather, equipment breakdowns, and vacant berths.

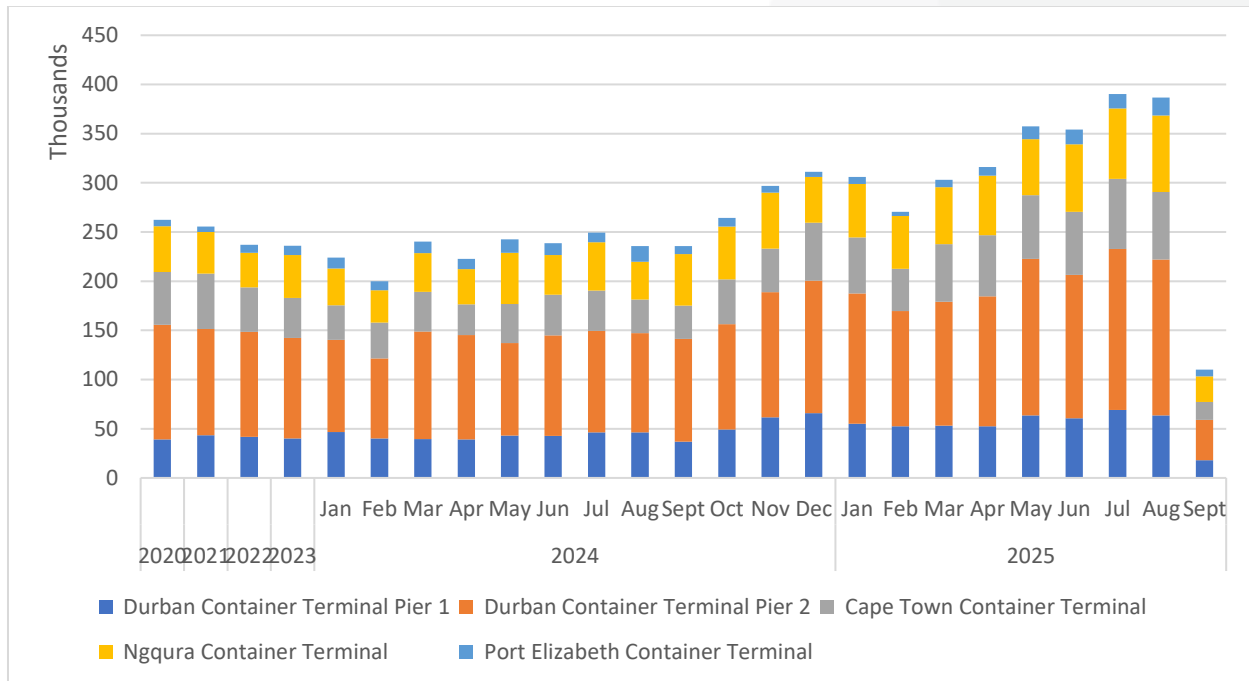
Table 3 – Container Ports – Weekly flow projected for 8 to 14 September (measured in TEUs)

7-day flow projected (08/09/2025 – 14/09/2025)			
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	↓15%
Cape Town Container Terminal	2 193	15 353	↓7%
Ngqura Container Terminal	1 655	11 582	↓50%
Port Elizabeth Container Terminal	391	2 736	↓57%
Other	873	6 114	↑3%
Total	12 026	84 179	↓18%

Source: Calculated from TPT, 2025. Updated 07/09/2025.

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.

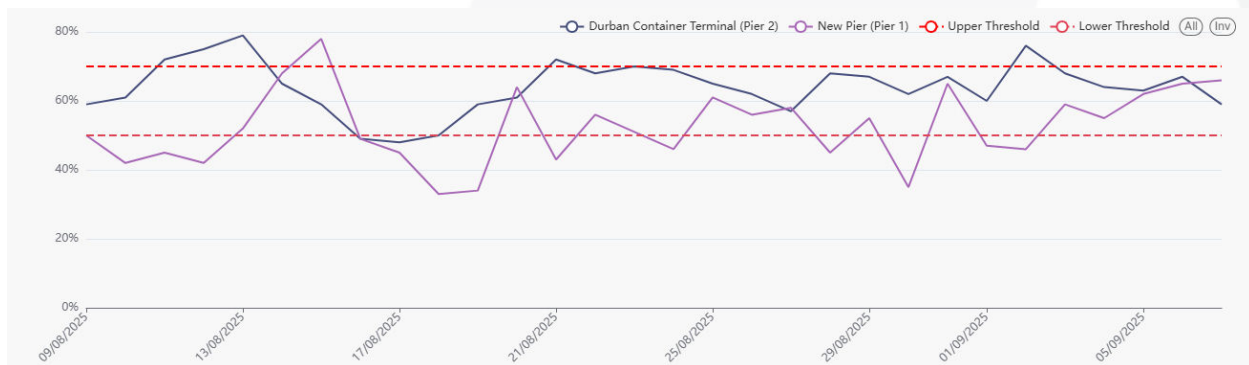
Figure 3 – Monthly flow reported for total container movement (thousands, 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 07/09/2025.

The following figure shows daily stack occupancy in both Durban terminals over the last five weeks.

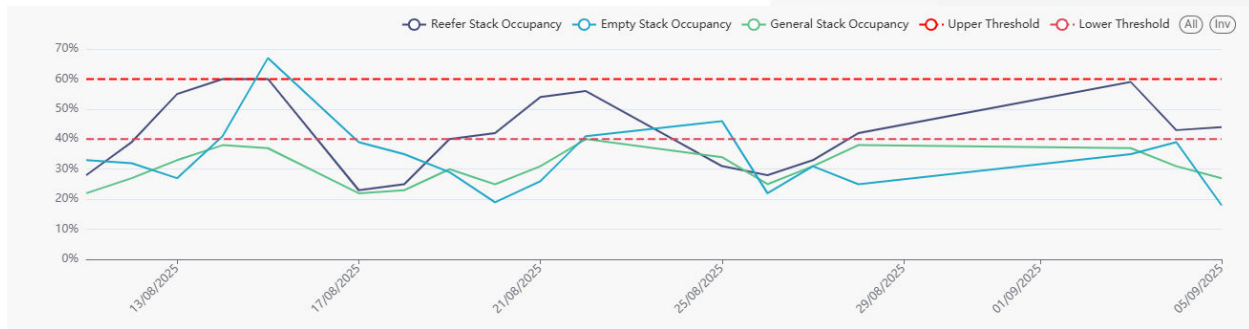
Figure 4 – Stack occupancy in DCT, general-purpose containers (9 August to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 07/09/2025.

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 (9 August to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 07/09/2025.

b. Summary of port operations

i. Weather and other delays

- Several operational hours were conceded in Cape Town due to adverse weather conditions and vacant berths.
- Strong winds, equipment breakdowns, and congestion ensured operational disruptions in Durban.
- Agent delays, vacant berths, and inclement weather resulted in operational delays at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay this week.

ii. Cape Town

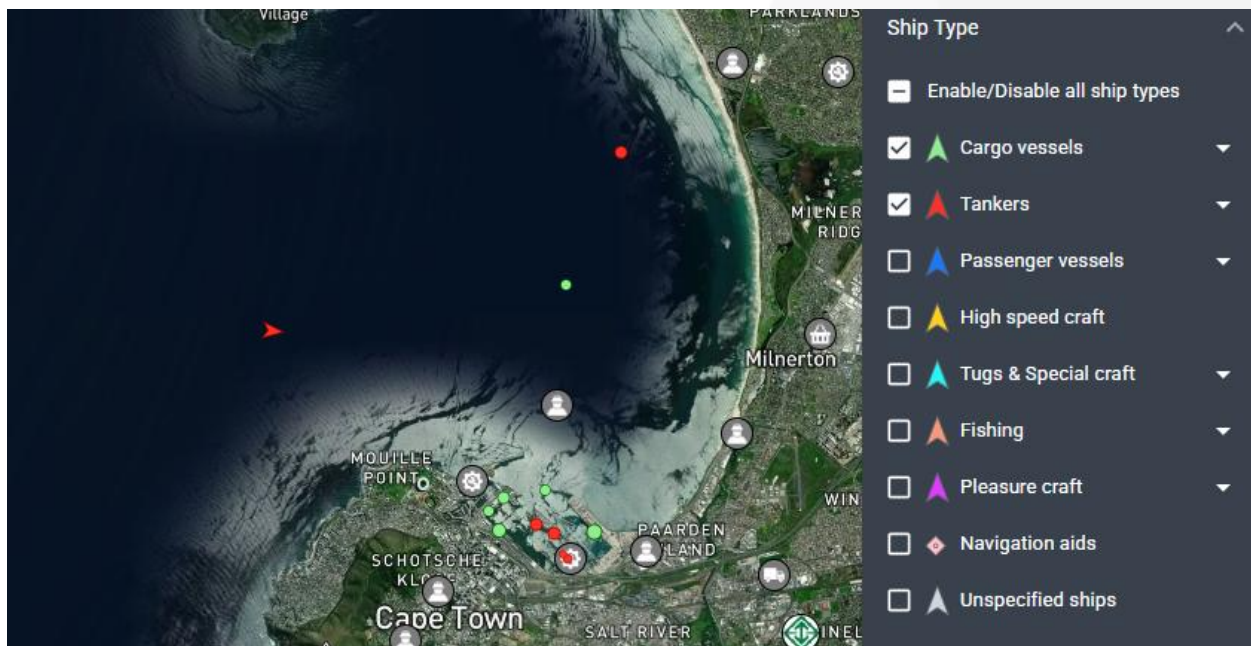
On Thursday, CTCT recorded two vessels at berth and one at anchor, as vacant berths and adverse weather conditions proved to be the primary operational constraints at the port. On the landside, between Monday and Thursday, the terminal managed to service at least 3 775 trucks while handling approximately 294 rail units. On the waterside, the terminal executed approximately 5 679 container moves across the quay during the same period. Additionally, this week, the terminal operated with **eight** STS cranes, between **23 and 26 RTGs**, and around **58 to 60 hauliers**. Crane LC7 was the most notable crane absentee, with the machine expected to return to operations before the weekend.

On Thursday, CTMPT had zero berthed vessels, with zero vessels waiting at outer anchorage. During the previous 24-hour period, the terminal managed to handle 837 tons on the waterside, while servicing approximately 19 trucks on the landside. Stack occupancy figures were recorded at 1% for the general stack, 3% for reefers, and 0% for empties. For the most significant part of the week, the terminal operated with three cranes and four straddle carriers.

Between 25 and 31 August, the FPT terminal handled eight vessels: four multi-cargo, one breakbulk, one container, one dry bulk, and one vessel containing fruit. Berth occupancy during this period was recorded at 68%. The terminal planned to handle seven more vessels between 1 and 7 September, with another six vessels scheduled between 8 and 14 September. Inclement weather, the late arrival of cargo, and equipment challenges accounted for the most significant operational constraints during this period.

For the fruit industry, export volumes remain strong, with a **↑16%** year-on-year increase since the start of the deciduous season, though cold store utilisation in the Western Cape sits at a relatively modest **45%**. However, as mentioned above, strong South Easterly winds and ongoing operational challenges at Cape Town's container terminal continue to weigh on efficiency, forcing exporters to adjust operations and underscoring the need for more consistent processes.

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



Source: Marine Traffic. Updated 07/09/2025 at 14:00.

iii. Durban

Pier 1 On Thursday, Pier 1 recorded two vessels on berth, with two vessels at anchor. Between Monday and Thursday, the terminal executed at least 6 600 gate moves and 596 rail moves on the landside. The **average TTT** for the week was **~65 minutes (↑16%, w/w)** and an average **staging time** of **~43 minutes (↑39%)**. Additionally, the terminal moved over 4 000 TEUs across the quay on the waterside during the same period. The terminal had between **three and four STS cranes** and **15-16 RTGs** available for the most significant part of the week. Towards the end of the week, a serious accident involving 25 cars occurred on the N3, which delayed some transporters en route to the terminal. As a result, tolerance was increased on the landside for those transporters who arrived late for their booking slot.

Pier 2 had four vessels on berth and one at anchorage on Thursday, as equipment breakdowns and strong winds prevented optimal operational performance this week. The terminal operated with **11-12 gangs** and moved over **13 400** containers across the quay between Monday and Thursday on the waterside. Approximately **8 737** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~79 minutes (↑1%, w/w)** and an average **staging time** of **~75 minutes (↓6%)**. Approximately 1 102 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **62** and **64** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **58%** during this period.

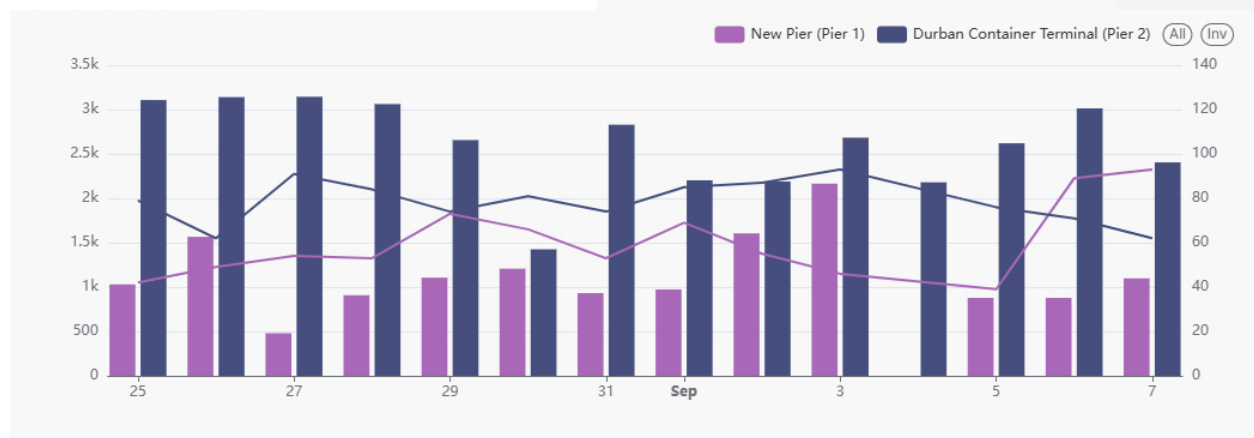
Durban's MPT terminal recorded one vessel at berth on Thursday and one at outer anchorage. Stack occupancy for containers was recorded at 26% and the reefer stack at 9%, with the breakbulk stack at 15%. In the preceding 24 hours, 358 containers were handled on the waterside. On the landside, 361 container trucks were serviced at a TTT of ~23 minutes. Additionally, 21 breakbulk trucks, containing 561 tons, were serviced. During this period, two cranes, ten reach stackers, seven forklifts, and 22 ERFs were in operation. The third crane (Crane 04) remained out of commission for the most significant part of the week but is expected to return to service before the weekend. Additionally, reports from TPT maintain that the fourth crane is only scheduled to return to service around 21 December.

Between Wednesday and Thursday, the Maydon Wharf MPT recorded one vessel at berth and zero at anchorage. On the waterside, 80 tons were handled, while 72 trucks, containing 2 135 tons, and nine rail wagons containing 470 tons were handled on the landside. During the same period, the agri-bulk facility had zero vessels at berth and zero vessels at anchor, with the next vessel expected to arrive just before the weekend.

On Thursday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with four at anchorage. In the preceding 24 hours, the terminal handled 1 967 road units and 162 units on rail on the landside, while 2 659 units were handled on the waterside. Overall stack occupancy was recorded at 56%, with 90% recorded at Q&R and 90% at G-berth. During this period, the terminal had 119 high-and-heavy units (abnormal loads) on hand and managed to handle 17.

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.

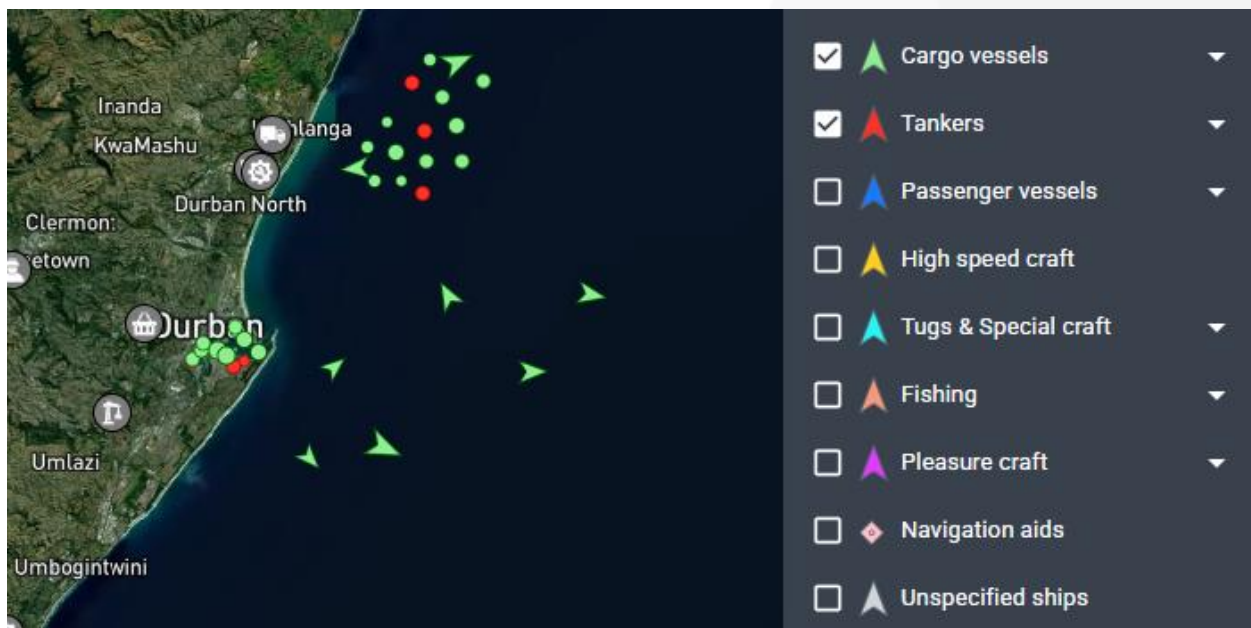
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 07/09/2025.

The queue of container vessels waiting outside Durban has remained stable since last week. On Monday evening (8 September), **one** container vessel was waiting outside the anchorage at Pier 1, **one** for Pier 2, and **none** for Point. The queue of dry (**two**), liquid (**five**), and breakbulk (**three**) vessels has 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 07/09/2025 at 14:00.

iv. Richards Bay

On Wednesday, the Port of Richards Bay had five vessels at anchor and 12 on the berth, translating to four vessels at DBT, four at MPT, four at RBCT, and none at the liquid bulk terminal. Two tugs and one pilot boat were deployed to support marine resources towards the end of the week. The port helicopter remained out of commission for the entire week, with no indication yet as to when the craft will return to service.

The daily average coal throughput for the week increased and averaged around **177 000 tons** (**↑12%**, w/w) a day. An average of **13 trains** was serviced on the landside (down by **11** from last week), and significantly below the target of 22.

v. Eastern Cape ports

On Wednesday, NCT recorded three vessels on berth and one at anchor, with one vessel drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. For the most significant part of the week, the Ports of PE and Coega shared a pilot boat due to some waterside equipment challenges. Stack occupancy figures were recorded at 35% for reefers, 54% for reefer ground slots, and 44% for the general stack. Despite experiencing agent delays, the terminal handled approximately 3 485 TEUs and 148 reefers on the waterside. Approximately 782 trucks were processed on the landside at a TTT of ~32 minutes. Additionally, the terminal serviced four trains at a RTT of ~2 hours. For the most significant part of the week, the terminal had seven STS cranes, between 24-25 RTGs, and between 49-64 hauliers in service.

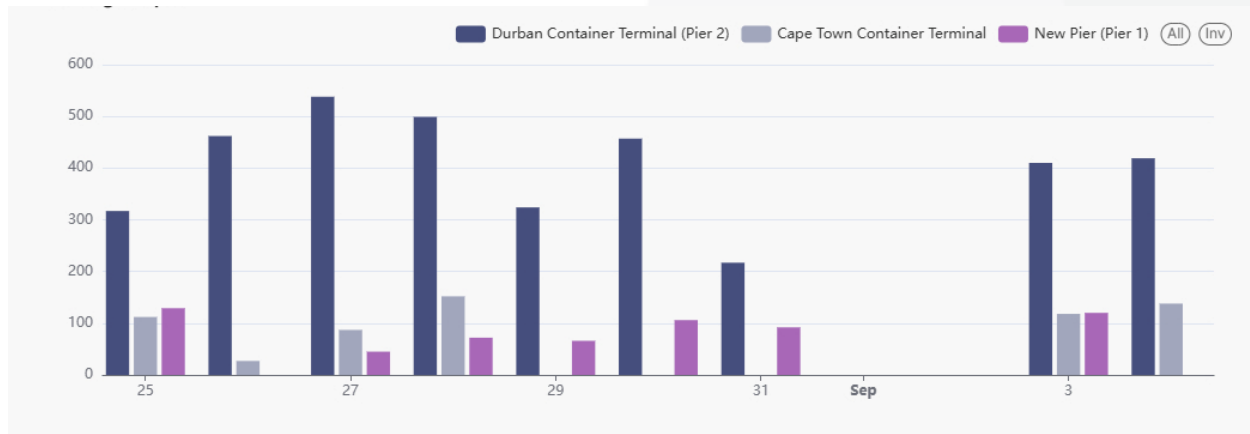
On Thursday, GCT had one vessel at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 421 trucks were processed at a TTT of ~14 minutes on the landside, while 363 TEUs and 31 reefers were handled across the quay on the waterside. Stack occupancy was recorded at 28% for the general stack, 64% for reefers, and 54% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and seven straddles in service.

On Wednesday, the Ro-Ro terminal had zero vessels on berth and zero at outer anchorage. During the preceding 24 hours, the terminal handled around 421 units on the waterside, resulting in a stack occupancy of 36%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that delays are still being experienced on the line between City Deep and Mafikeng due to ongoing cable theft and diesel hauling. Additionally, towards the end of the week, DCT Pier 2 had 265 ConCor units on hand with a dwell time of 48 hours and 328 over-border units with a dwell time of 63 days.

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



Source: Calculated using data from Transnet, 2024. Updated 07/09/2025.

In the last week (1 to 7 September), rail cargo on the ConCor line out of Durban was reported at **2 756** containers, down by a significant **↓17%** from the previous week's **3 324** containers.

Lastly, private-sector interest in South Africa's third-party rail-slot allocation – reflected by 52 initial respondents for NatCor and ultimately 11 confirmed participants such as Grindrod and MSC – signals growing confidence in the Transnet turnaround under Minister Creecy, especially when combined with week-on-week improvements in port throughput. However, the recovery remains fragile, with stakeholders stressing that meaningful progress must be underpinned by technical rigour, coordinated collaboration, and sustained infrastructure enhancement.⁶

vii. Transnet financial results FY2025

Transnet released its annual financial results on Friday, 5 September, with the following financial and operational figures (year ended 31 March 2025) reported:

- **Revenue:** up **↑7,8%** to **R82,7 billion** (FY2024: R76,7 billion), mainly due to tariff increases and higher rail volumes.
- **Net loss:** Reduced sharply by **↓74%** to **R1,9 billion** (FY2024: R7,3 billion).
- **EBITDA:** up **↑39,4%** to **R30,6 billion** (FY2024: R22,0 billion); margin improved to **37%**.
- **Net operating expenses:** down **↓4,9%** to **R52,1 billion**, driven by fewer third-party claims but offset by higher personnel, electricity, security, and material costs.

⁶ Goddard, E. 02/09/2025. [SA on right track with rail-slot process – SAAFF](#).

- **Capital expenditure:** up **↑44,2%** to **R24,0 billion** (FY2024: R16,7 billion), with focus on infrastructure and port equipment renewal.
- **Cash generated from operations (post working capital):** Slight decreased by **↓0,6%** to **R28,6 billion**.
- **Cash Interest Cover (CIC):** **1,8×** (below the covenant requirement of **2,0–2,5×**, but waivers secured from lenders).
- **Gearing:** Stable at **~49,6%** (FY2024: 49,0%).
- **Borrowings:** Total debt **R144,8 billion** (FY2024: R137,7 billion).
- **Volumes:**
 - **Rail freight:** **160,1 Mt** (**↑5,5%**, y/y, but below **170 Mt target**).
 - **Port containers:** **4,09 million TEUs** (**↓1,4%**, y/y, but below **4,4 million TEU target**).
 - **Pipeline volumes:** **13,37 bn litres** (**↓12%**, y/y, but below **14,8 bn litres target**).
 - **Automotive throughput:** **803 908 units** (**↑3,9%**, y/y, and above the **760 000 units target**).

Key challenges and risks remain the following:

- **Operational underperformance:** Rail volumes, port container moves, and pipeline throughput fell short of targets.
- **Covenant breaches:** CIC covenant breach on **~R38,6bn** of loans; waivers obtained.
- **Liquidity pressures:** Net current liability position of **R65,2bn**; reliant on **R145,8bn government guarantees**.
- **Irregular expenditure:** Reported at **R3,2bn** (**↓16,7%** vs FY2024 R3,8bn).
- **Litigation:** **R5,5bn+** settlements with Sasol & TotalEnergies recognised (adjusting events).

viii. Taxi strike

Towards the end of the week, the taxi industry had a strike in Durban which subsequently impacted operations at the port. The following terminals were affected in the following manner on Thursday:

Towards the end of the week, the taxi industry had a strike in Durban which subsequently impacted operations at the port. The following terminals were affected in the following manner on Thursday:

- Pier 1, Pier 2, DRT/MPT, MPT-Maydon Wharf and Agri, as well as the Ro-Ro terminal had full staff complements, resulting in these terminals not being impacted by the strike.
- The Maydon Wharf terminal was impacted and subsequently operated with limited staff. The terminal operated with one gang instead of the usual two/three.
- Island View was not severely impacted; however, vessel delays were reported.
- The staff complement at TNPA was impacted but improved as the day progressed. They started with two tugs (due to no pilots) and two berthing gangs, which moved up to four tugs with four berthing gangs as the day progressed.

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 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

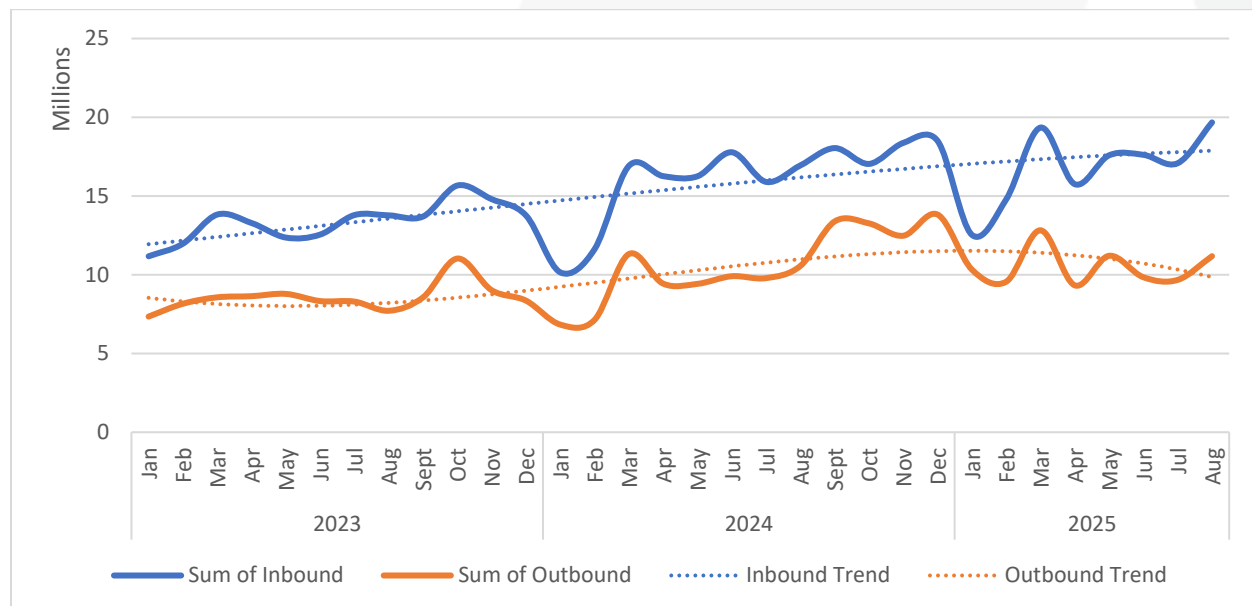
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	623 268	4 362 879	↑5%
Volume outbound	355 760	2 490 319	↓4%
Total	979 028	6 853 198	↑2%

Courtesy of ACOC. Updated: 07/09/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA amounted to ~623 000 kg inbound (↑5%, w/w) and ~356 000 kg outbound (↓4%). The current levels indicate that cargo is still trending above last year's level (~↑4%, y/y, and slightly above the comparative levels of pre-pandemic 2019 (~↑5%).⁸

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

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



Calculated from ACOC. Updated: 07/09/2025.

Operationally, the air cargo industry continues to face headwinds as critical issues with ACSA remain unresolved, including warehouse leases, the cargo precinct upgrade, and the long-awaited midfield terminal. Frustration among stakeholders is mounting, as engagement with ACSA's leadership has yet to materialise, leaving the sector feeling overlooked despite its strong recent performance.

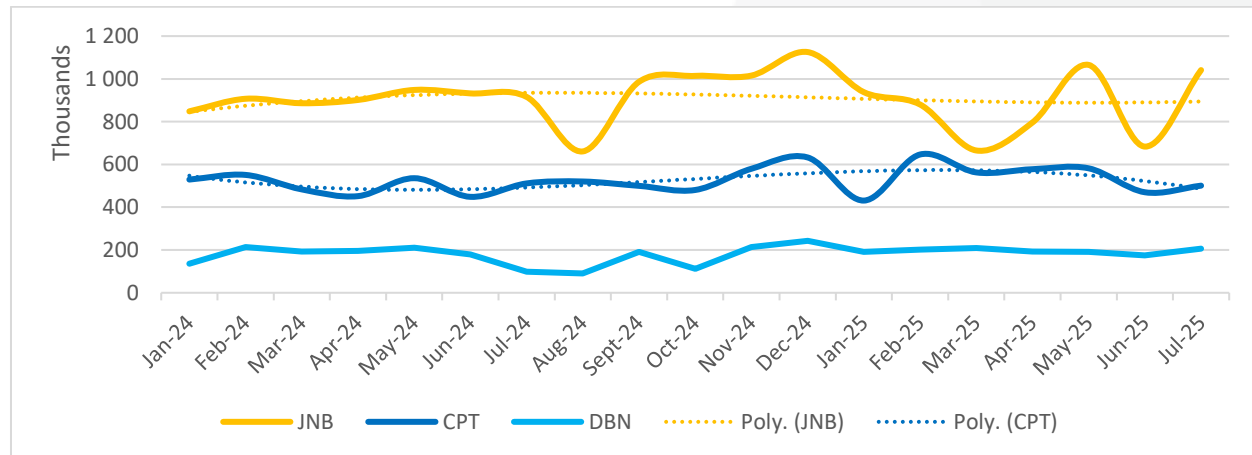
⁷ Note: We have updated the reporting period to coincide with the latest Monday to Sunday cycle (7 to 13 July).

⁸ Note: The international air cargo throughput figures for OR Tambo International in this edition are based on estimated daily averages derived from the past four weeks of data, as the latest weekly statistics were not yet available at the time of publication. These figures will be updated with the official throughput in next week's report.

b. Domestic air cargo

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 07/09/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (1 to 7 September), movements along the N4 corridor decreased for road transport and increased for rail transport. The following notes summarise the recent developments:

- Truck volumes through the border post decreased to **1 521 HGVs per day** (↓10%, w/w).
- Queue times increased to an average of **4,9 hours** (↑17%) at the border.
- The average processing time also increased to an average of **4,1 hours** (↑12%) per crossing.
- The rail to Maputo increased to an average of **ten trains daily** (up by **five** from last week).
- Sugar trains from Eswatini were also stable at around **one train a day**.
- Lebombo road rehabilitation:
 - Road contractors confirmed rehabilitation works on the westbound lane began on 3 September at 07:00.
 - Eastbound traffic will be regulated during construction.
 - Upgrades are expected to be completed by the end of September.

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	1521	1494	1112	227	36	81	46	286	9	10	2	1
% (w/w)	-10%	-9%	-16%	-3%	13%	-14%	28%	14%	45%	3%	33%	33%
% 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 07/09/2025.

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 07/09/2025 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 **20 minutes** from last week, while transit time increased by about **10 minutes**.
- The median border crossing times at South African borders decreased by more than **an hour**, averaging **~10,3 hrs (↓11%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by around **10 minutes**, averaging **~5,7 hrs (↑4%)**.

1. Zimbabwe – ZIMRA permit confusion:

- A transporter was incorrectly informed that a pickup required a permit to cross the border.
- This contradicted the law, as only Mozambique requires such permits.
- FESARTA intervened by contacting senior officials to resolve the situation.

2. Zimbabwe – Anti-smuggling measures:

- FESARTA is engaging with the technical committee regarding anti-smuggling enforcement, which has been hampering transporters.
- Potential positive updates expected soon.

3. Kazungula border post:

- ASYCUDA Online system experienced issues on Monday evening, but was resolved later the same day.
- Authorities reminded drivers to declare personal goods after a truck was fined for being overweight due to undeclared charcoal (approx. 500kg).

4. Kasumbalesa border post:

- Officials instructed that all trucks, including abnormal loads, must undergo scanning.
- Drivers were additionally told they must pay for scanning, raising concerns.

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

Table 6 – Delays⁹ summary – South African borders (both directions)

Border Post	Direction	HGV ¹⁰ Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	443	22,4	4,4	22,3	13 290	3 101
Beitbridge	Zimbabwe-SA	465	14,8	3,1	14,5	13 950	3 255
Groblersbrug	SA-Botswana	240	14,2	1,3	14,1	7 200	1 680
Martin's Drift	Botswana-SA	196	2,4	0,3	2,3	5 880	1 372
Kopfontein	SA-Botswana	213	12,0	2,1	12,0	6 390	1 491
Tlokweng	Botswana-SA	20	0,6	0,2	0,4	600	140
Vioolsdrift	SA-Namibia	30	3,8	1,4	3,5	900	210
Noordoewer	Namibia-SA	20	2,0	0,4	2,0	600	140
Nakop	SA-Namibia	30	5,5	0,5	5,3	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,4	1,1	600	140
Skilpadshek	SA-Botswana	277	11,0	1,5	10,6	8 310	1 939
Pioneer Gate	Botswana-SA	40	0,0	0,0	0,0	1 200	280
Lebombo	SA-Mozambique	1 674	4,9	1,4	4,6	50 220	11 718
Ressano Garcia	Mozambique-SA	1 597	1,3	0,2	1,2	47 910	11 179
Sum/Average		5 265	6,9	1,2	6,7	157 950	36 855

Source: TLC, FESARTA, & Crickmay, week ending 31/08/2025.

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	19,4	3,9	19,2	9 600	2 240
Central Corridor	798	2,6	0,3	1,0	23 940	5 586
Dar Es Salaam Corridor	1 819	10,9	1,2	10,9	54 570	12 733
Maputo Corridor	3 271	3,1	0,8	2,9	98 130	22 897
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 534	12,4	1,5	12,4	106 020	24 738
Northern Corridor	2 817	1,5	0,6	2,4	92 520	21 588
Trans Caprivi Corridor	347	3,6	0,6	3,3	10 410	2 429
Trans Cunene Corridor	100	3,1	0,6	3,0	3 000	700
Trans Kalahari Corridor	116	11,1	1,8	10,9	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	13 349	6,3	0,9	6,2	408 480	95 312

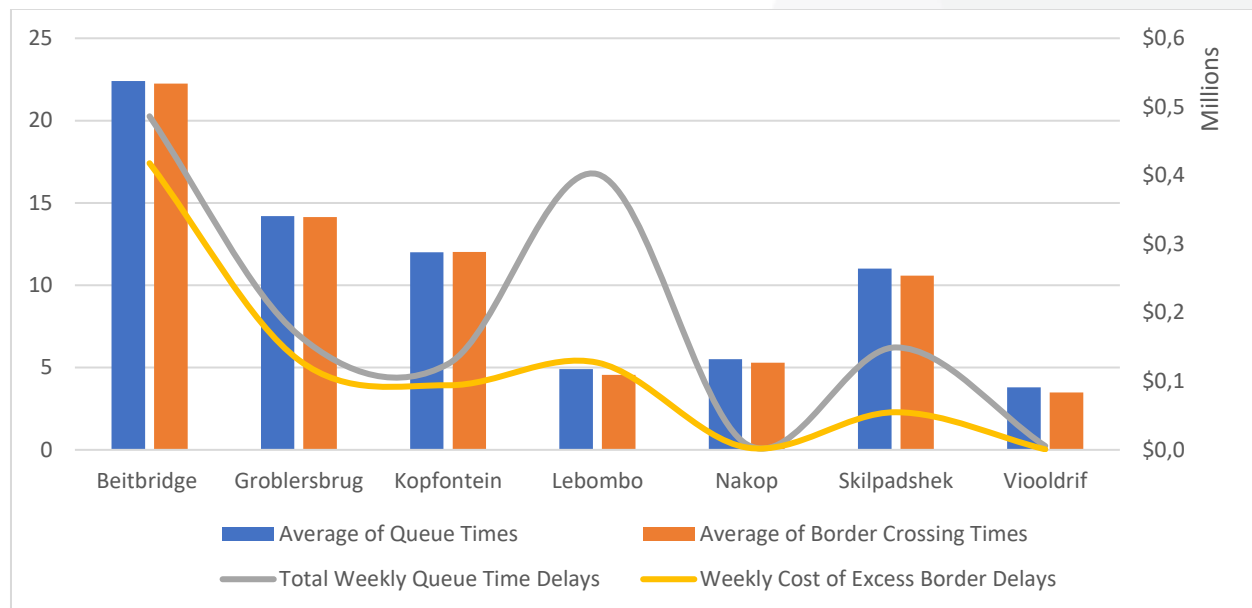
Source: TLC, FESARTA, & Crickmay, week ending 31/08/2025.

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

⁹ Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.

¹⁰ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

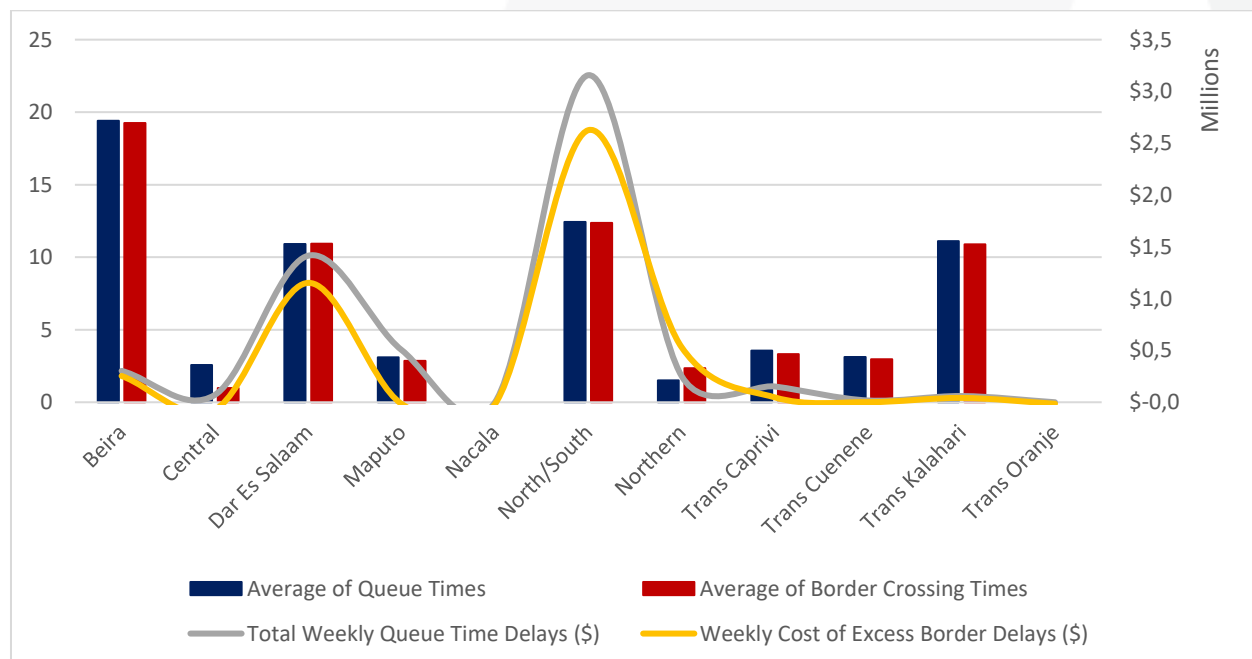
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 31/08/2025.

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 31/08/2025.

In summary, cross-border queue time averaged **~6,3 hours** (down by **~0,3 hours** from the previous week's **~6,7 hours**), indirectly costing the transport industry an estimated **\$5,9 million (R104 million)**. Furthermore, the week's average cross-border transit times also hovered around **~6,2 hours** (up by **~0,1 hours** from the **~6,2 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$4,5 million (R80 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$10,5 million (R184 million)**, up by **↑5,8%** from the **~R174 million** in the previous report).

4. International Update

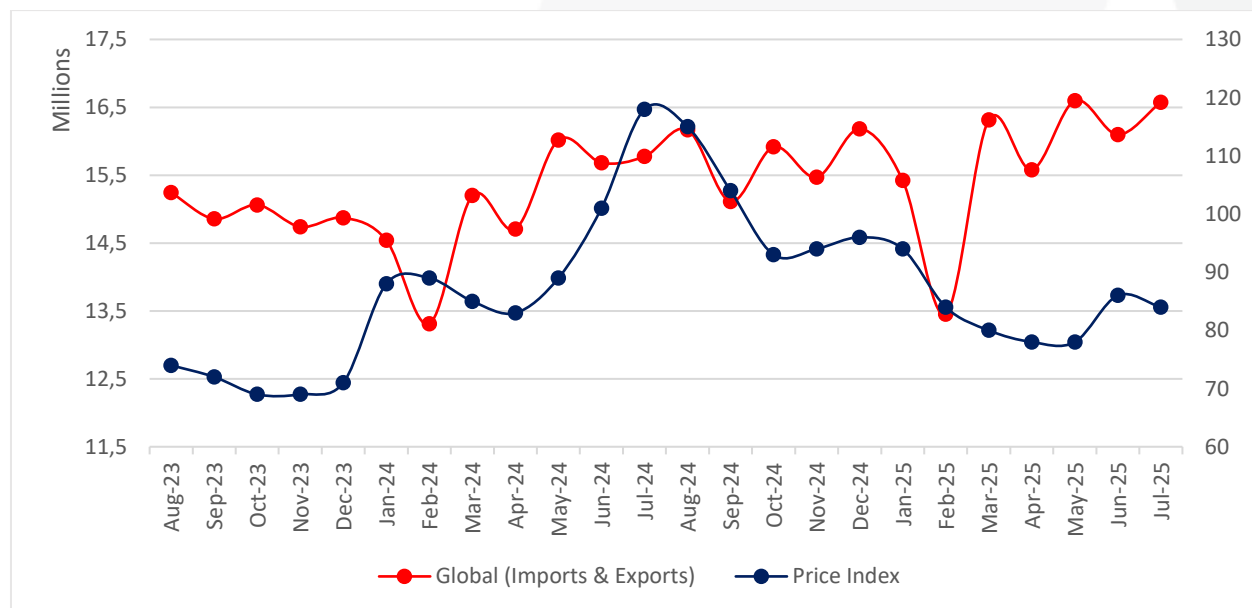
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Global container trade statistics for July and Port Throughput Index

The latest container throughput figures for July from *Container Trade Statistics (CTS)* show that container volume increased to near-record throughput in July. The total throughput is up by **↑3,0%** monthly and up by **↑5,1%** (y/y) annually. Most trade lanes experienced increases in July, with Indian Sub-Continent and the Middle East imports increasing the most at **↑7,0%**. Interestingly, as reported last month, the numbers to watch are North American imports and exports with the ongoing trade and tariff saga. Of all regional import flows, North American imports increased by the lowest number, down by **↑1,4%**. For exports, North America registered a fourth consecutive month of declines, at **↓3,0%** in July, after **↓1,4%**, **↓6,0%** and **↓5,1%** reductions respectively each month to April. The global price index (dry and reefer combined) decreased in July by **↓2,3%** monthly – but remains significantly down by **↓29%** yearly. Collectively, the following figure illustrates the global container throughput and price index in the last two years:

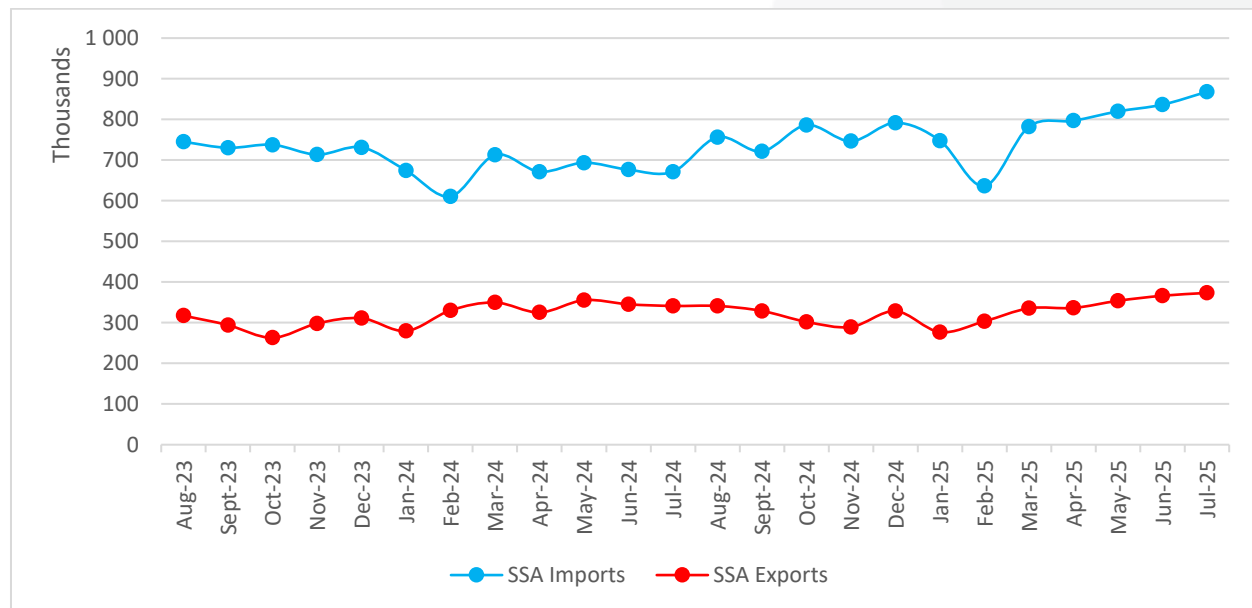
Figure 15 – Global Containerised Throughput (TEUs) and price index



Source: Calculated from [CTS](#)

Container throughput in July reached **16,6 million TEUs** – some **20 thousand containers** below the record level of May. The following figure shows Sub-Saharan African trade over the same period, with a **↑3,8%** (m/m) increase in containers imported, and a **↑1,9%** (m/m) increase in containers exported:

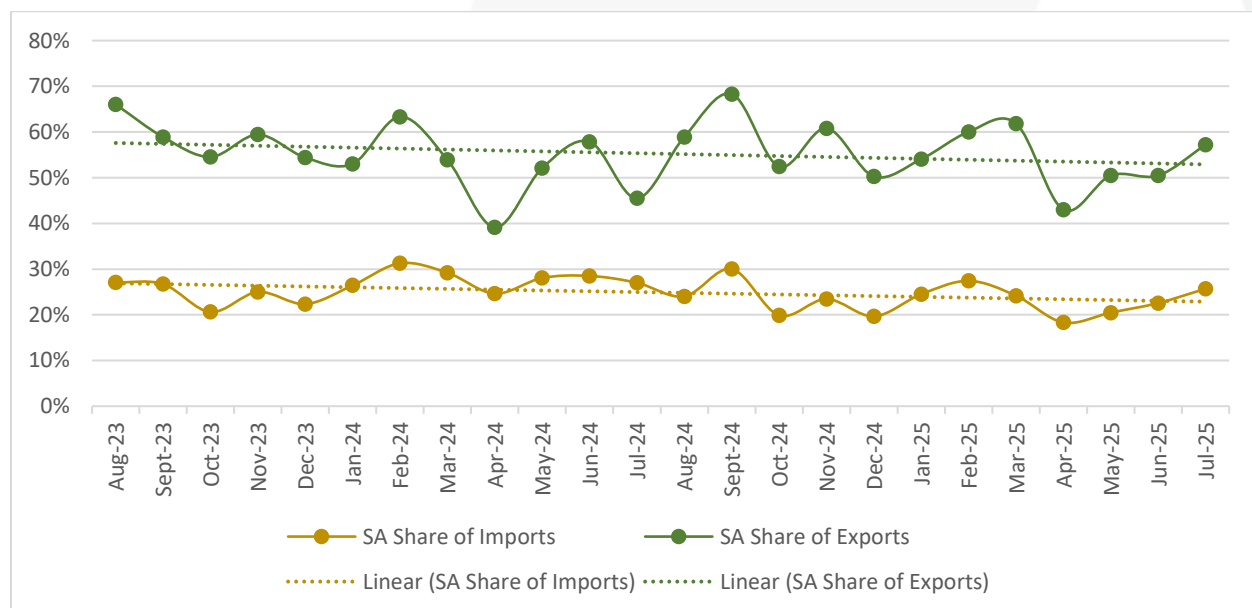
Figure 16 – Sub-Saharan Africa Containerised Throughput (TEUs)



Source: Calculated from [CTS](#)

Yearly SSA imports are also up (by a significant **↑29%, y/y**) – with exports up by **↑9,4% (y/y)**. The following graph, adding South Africa's share to SSA trade, shows an encouraging continuation of the trend reversal, as Transnet's numbers in July (**436 428 TEUs**) are cyclically very high (**↑30%, y/y**):

Figure 17 – South Africa's share in regional containerised throughput (% share)



Source: Calculated from [CTS](#)

After several weeks of excellent throughput continuing in August, we can expect the positive trend to continue. Indeed, when measuring these, South Africa accounted for approximately **26%** of SSA imports and **57%** of SSA exports in July, according to TNPA figures. These respective shares are still significantly less than the highs of **35%** in February 2022 for imports and **82%** in September 2022 for exports. Encouragingly, these

gains have not only stemmed the tide but set the stage for a sustained rebound, and with the consistently strong weeks of late, August is shaping up to deliver a truly impressive.

ii. Container industry summary

This week saw carriers strategically scaling back capacity: Golden Week blank-sailing notices began, with lines reducing sailings to support general rate increases,¹¹ while Maersk and Hapag-Lloyd suspended their Gemini TP9 transpacific loop amid softening demand.¹² Indeed, Drewry's "Cancelled Sailings Tracker" trended around the **8%** for scheduled sailings between 8 September and 12 October.¹³

Across Europe, port dynamics shifted as the 2025 alliance reshuffle bolstered the market share of Hamburg and Valencia at the expense of traditional hubs such as Antwerp and Tangier, according to *Sea Intelligence*.¹⁴ In the shipbuilding domain, new orders continue to surge – containership orders now account for over **32% of capacity**, with deliveries projected to reach **2,9 million TEU** in 2027 and **3,8million TEU** in 2028, far outpacing planned scrapping.¹⁵

iii. Global freight rates

Drewry's "World Container Index" continued to decline this week, albeit at a slower pace. The index is down by another **↓0,7%** (or **\$15**) to **\$2 104 per 40-ft container** this week.¹⁶ Overall, rates remain down by **↓56%** (y/y). Linerlytica this week mentioned that, although rates were unchanged last week, it masked conflicting performances across key trade lanes – with the Asia–Europe route slumping to its sharpest weekly decline since February, while the Transpacific route showed surprising resilience and managed to retain most of its 1 September rate hikes. This resilience is unlikely to persist, as freight rates remain under pressure from insufficient capacity discipline; the Golden Week blank sailings announced for October have been underwhelming, with Gemini carriers unwilling to withdraw surplus capacity and instead prepared to cut rates to sustain schedules. Meanwhile, the *Harper Petersen Index* (Harpex) continues to emphasise the solidity of the charter market and remained almost unchanged this week, trading around **2 213 points** on Friday (**↑12%**, y/y).¹⁷ The following illustrates the divergent trend of spot versus charter rates since the start of last year:

¹¹ Goldstone, C. 02/09/2025. [Golden week blanked sailings announcement begin as carriers support GRIs.](#)

¹² Van Marle, G. 10/09/2025. [Gemini partners suspend transpacific TP9 service as demand falls.](#)

¹³ Drewry. 05/09/2025. [Cancelled Sailings Tracker.](#)

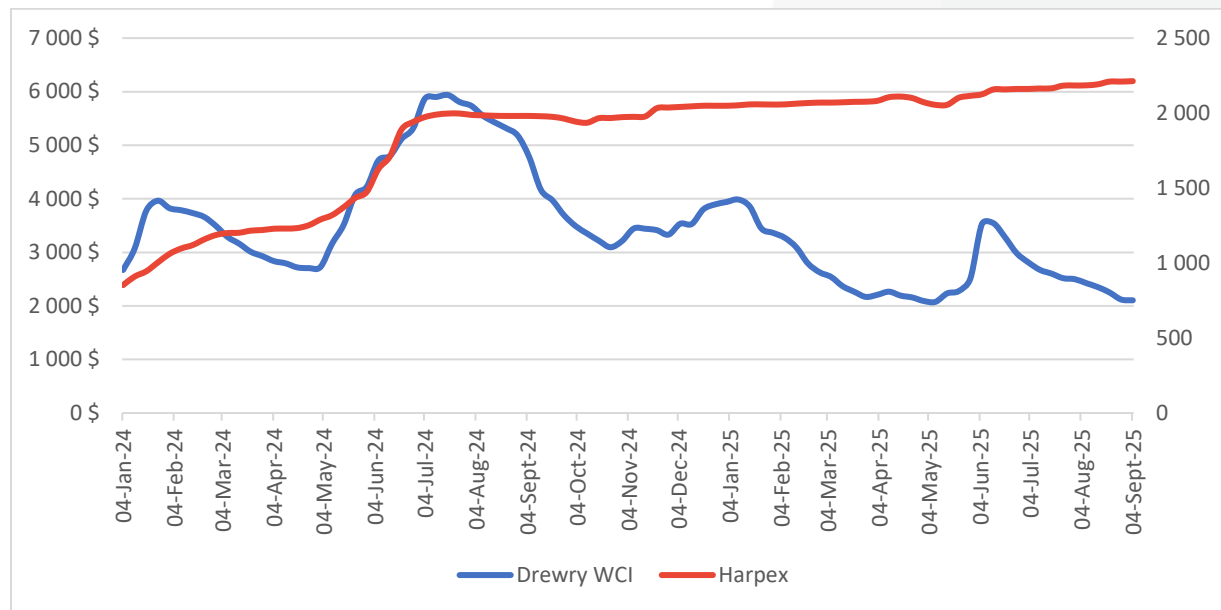
¹⁴ Murphy, A. 09/09/2025. [Europe's New Port Order.](#)

¹⁵ Linerlytica. 08/09/2025. [Market Pulse – Week 36.](#)

¹⁶ Drewry. 04/09/2025. [World Container Index.](#)

¹⁷ Harpex. 05/09/2025. [Harper Petersen Index.](#)

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



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

iv. Further developments of note

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

1. US Supreme Court set to hear President Trump's sweeping tariffs:

- The US Supreme Court has agreed to hear, on an expedited schedule this November, a pivotal case challenging the legality of former President Trump's sweeping tariffs imposed under the International Emergency Economic Powers Act (IEEPA) – a case likely to redefine the boundaries of executive trade authority and carry potentially vast economic implications.¹⁸
- Treasury Secretary Scott Bessent warned that, should the Court rule against the administration, approximately half of the tariffs collected – amounting to tens of billions of dollars – would have to be refunded, imposing a severe financial strain on the US Treasury and unsettling bond markets.¹⁹
- The case carries broad constitutional and fiscal ramifications: beyond the legal battle over statutory overreach, stakeholders are bracing for cascading refund claims, administrative challenges, and implications for future trade policy, as both the balance of powers and the sustainability of tariff revenue collections hang in the balance.²⁰

2. 67 containers overboard ZIM-chartered vessel outside Long Beach:

- A Zim-chartered vessel lost 67 containers while berthed at the Port of Long Beach, with boxes tumbling directly into the harbour basin rather than at sea.²¹
- The accident caused temporary disruption to terminal operations and raised renewed concerns over cargo-handling safety and vessel stability protocols in congested US gateways.

¹⁸ Chung, A. 10/09/2025. [US Supreme Court to decide legality of Trump's tariffs.](#)

¹⁹ Hawkins, A. 07/09/2025. [US could be forced to refund 'about half' of tariffs if SCOTUS rules against Trump, Bessent says.](#)

²⁰ Wiltermuth, J. 09/09/2025. [Billions of dollars in Trump tariffs at stake as Wall Street awaits Supreme Court decision.](#)

²¹ Chambers, S. 10/09/2025. [67 boxes tumble overboard from ZIM-chartered vessel berthed at Long Beach.](#)

b. Global air cargo industry

In the high-frequency metrics from World ACD, global air cargo markets remained mixed in late August. Worldwide chargeable weight was broadly stable, but still **↑3%** above last year, with rates averaging around **\$2,44 per kilogram**, slightly below 2024 levels. Regional dynamics diverged: Asia Pacific (**↑7%**, y/y), Europe (**↑5%**), and Africa (**↑11%**) showed resilience, while North America (**↓2%**, y/y) and Central and South America (flat) lagged. Capacity rose **↑4%** (y/y), led by Asia Pacific and Europe, though Middle East and South Asia volumes fell sharply (**↓16%**, y/y).

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

Origin Regions last 2 to 5 weeks									
	Capacity ¹			Chargeable weight ¹			Rate ¹		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-1%	+11%		+5%	+0%		+1%	+9%
Asia Pacific		+1%	+7%		+5%	+8%		-1%	-4%
C. & S. America		-1%	+0%		+1%	+2%		+1%	-3%
Europe		+1%	+5%		-5%	+1%		-1%	+1%
M. East & S. Asia		-1%	+3%		+3%	+0%		+1%	-16%
North America		-2%	-2%		+0%	-0%		+2%	-1%
Worldwide		-0%	+3%		+1%	+4%		+1%	-3%

Source: [World ACD](#)

Overall, modest global demand growth is being balanced by rising capacity, keeping rates under pressure. Nevertheless, some industry players have noted that volumes remain surprisingly robust during the European summer.²² However, pressures remain, as on-time performance among the major airlines fell downwards in July, with the current number from Cargo IQ hovering around **77%** in July.²³

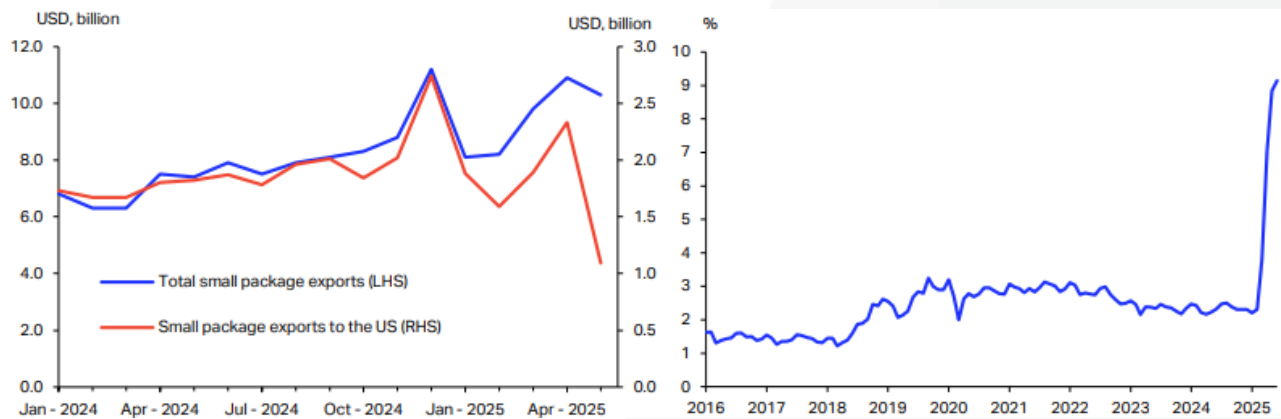
Elsewhere in the industry, the latest quarterly “*Air Transport Chartbook, Q2 2025*” from IATA again highlighted the primary development in international trade in 2025, namely the US tariffs.²⁴ IATA showed that the US effective tariff rate on imports exceeding **\$1 billion** has surged to approximately **↑18%**, a level not seen since the 1930s. Concurrently, small-package exports from China, a key driver of air-cargo volumes, have sharply contracted, particularly in shipments to the US.

²² Lennane, A. 03/09/2025. [Airfreight volumes ‘surprisingly’ robust, thanks to summer bump.](#)

²³ Goldstone, C. 04/09/2025. [Forwarders hit as on-time performance of air cargo schedule worsen.](#)

²⁴ IATA. 25/08/2025. [Air Transport Chartbook, Q2 2025.](#)

Figure 20 – LH: Small package exports from China; RH: US effective tariff rate (%)



Source: [World ACD](#)

These developments reflect significant trade policy tightening and are contributing to disruptions in air-cargo growth, especially in China-US e-commerce corridors. The heightened tariffs and reduced small-parcel flows are dampening what had been a robust segment of international air-freight demand of late.

ENDS²⁵

²⁵ACKNOWLEDGEMENT:

*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.*