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Cargo Movement Update #260[1]

Date: 16 November 2025

Weekly Snapshot

Table 1 – Port volumes and air cargo flows, week on week

Flows	Current[2]			Previous[3]			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	34 150	38 907	**73 057**	36 484	41 565	**78 049**	↓6%
Air Cargo (tons)	4 908	2 789	**7 697**	5 728	3 297	**9 025**	↓15%

Monthly Snapshot

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

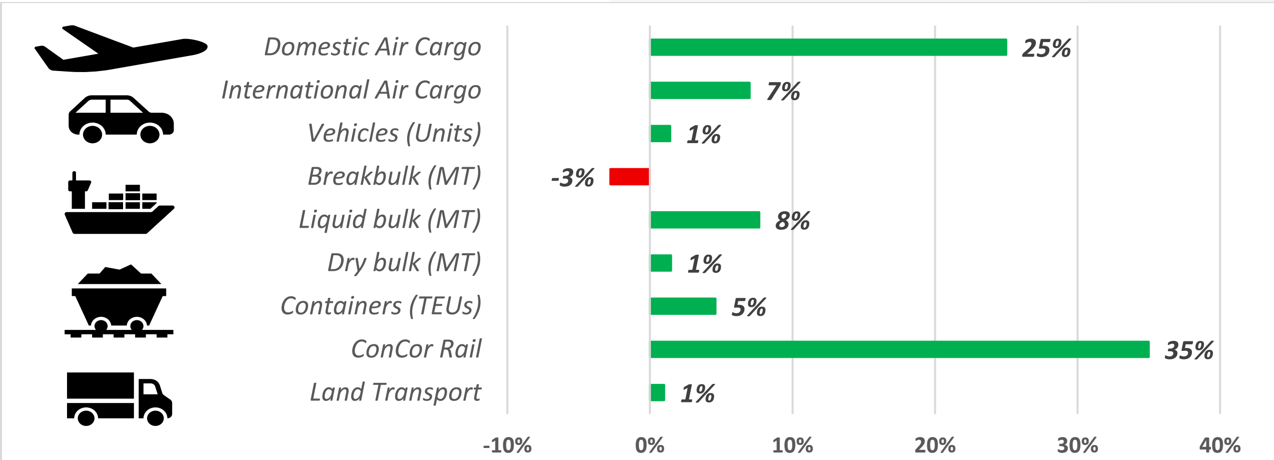
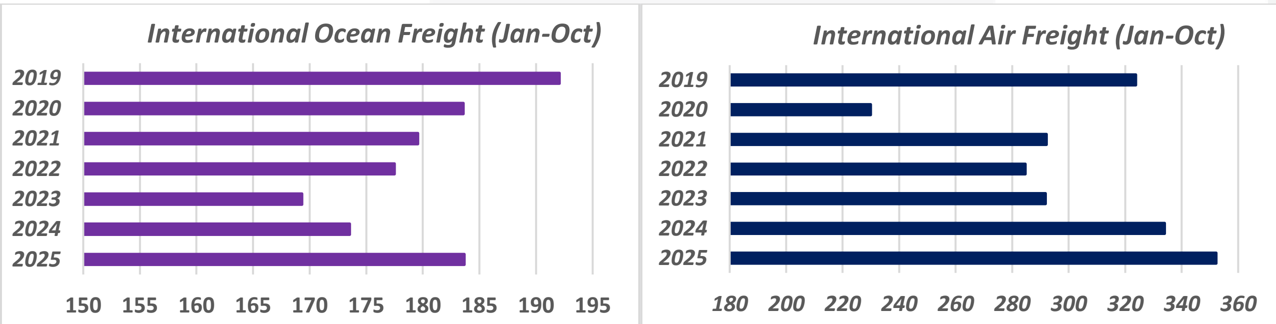


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~10 437 TEUs** was handled per day, with **~11 610 TEUs** projected for next week.
- TNPA Oct: TEUs are down by **↓32%** (m/m), but up by **↑5%** (y/y). Total bulk: **↓26%** (m/m) and **↓3%** (y/y).
- Rail cargo handled out of Durban was reported at **3 464** containers, down by **↓3%** from last week.
- Cross-border queue: **↑0,7 hrs**; transit: **↑0,6 hrs**; SA borders: **~12,7 hrs** (**↑12%**); SADC: **~5,7 hrs** (**↑10%**).
- After four weeks of increases, global spot rates fell by **↓5,1%** (or **$100**) to **$1 859/40ft**.
- Global air cargo fell by **↓3%** (w/w), as capacity remained stable and rates rose by **↑1%** to **$2,78/kg**.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *260th* update.
[2] '*Current*' means the last seven days (a week's) of available data.
[3] '*Previous*' means the preceding 8-14 days (a week) of available data.
[4] '*Monthly*' means the last months' worth of available data compared to the same month in the previous year. Most metrics: Oct vs. Oct.
[5] Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **10 437 TEUs** was handled daily, a decrease from **11 150 TEUs** the previous week.

Inclement weather, vacant berths, and equipment challenges mainly characterised port operations. Over 20 operational hours were conceded at the Port of Cape Town this week due to adverse weather conditions, as equipment challenges and bad weather prevented optimal operational performance in Durban. Inclement weather, vacant berths, and high swells ensured operational disruptions at our Eastern Cape Ports, while marine equipment challenges proved to be the main operational constraint at the Port of Richards Bay. The latest reports from TFR suggest that locomotive issues created some delays on the ConCor line between Johannesburg and Durban this week. Additionally, annual maintenance on the ConCor is scheduled to commence on Tuesday, 18 November. Further, trains on the line between City Deep and Mafikeng started moving quickly this week after the bottlenecks experienced on the line last week. The latest Southern Africa terminal and service update for week 46 provides good reading for most of our major South African terminals. No waiting times were recorded at CTCT, CTMPT, PECT, NCT, or DCT Pier 2. However, the situation at CTCT will most likely be affected by the adverse weather experienced over the weekend, as well as the poor weather conditions expected next week.

Global liner performance softened entering Q4, with the composite CCFI down about **↓14%** quarter-on-quarter as Transpacific spot rates declined sharply on weaker demand. At the same time, Asia–Europe prices remained comparatively resilient due to congestion-related supply constraints. Intra-Asia rates were broadly steady, and Asian carriers continued to post more substantial EBIT margins than European peers. The industry faces mounting oversupply risks, with the orderbook rising to **34% of fleet capacity** and record deliveries expected by 2028. Port congestion remains moderate but notable at Shanghai/Ningbo. Other developments of note include **(1)** port congestion in the Shanghai/Ningbo cluster and in Northern Europe, and **(2)** US tariffs softened on key food imports.

After last week's elevated numbers, international air cargo to and from South Africa decreased substantially as the daily average of air cargo handled amounted to **~701 000 kg** inbound (**↓14%**, w/w) and **~398 000 kg** outbound (**↓15%**). Nevertheless, despite the reduction in volumes, the current levels continue to trend significantly above last year's level (**~↑11%**) and the comparative levels of pre-pandemic 2019 (**~↑10%**).

Global air cargo softened in week 45 with worldwide tonnages declining by around **↓3%** while capacity held broadly steady. Despite this moderation, spot rates continued to firm – driven mainly by Asia Pacific and Central and South America – mirroring last year's seasonal pattern even though global rates remain slightly lower year-on-year.

In other aviation news, **(1)** the European Union has approved the abolishment of its de minimis (anticipated 2028), and **(2)** the upcoming Black Friday and Cyber Monday surge in European e-commerce is expected to deliver significant volume gains for online retail platforms.

On the N4 corridor, trade increased for road transport, while reporting for rail transport was sparse. Truck volumes through the border post increased to around **1 451 HGVs per day** (**↑9%**, w/w). Queue times decreased slightly to an average of **~6,1 hours** at the border. The average processing time also decreased slightly to an average of **~6,1 hours** per crossing.

In the SADC region, average cross-border road transport times – on average – increased this week. Overall, the average queue time increased by approximately **three-quarters of an hour** from last week, while transit time increased by about **half an hour**. The median border crossing times at South African borders increased by roughly **an hour and a half**, averaging **~12,7 hrs** (**↑12%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) also increased by around **half an hour**, averaging **~5,7 hrs** (**↑10%**). This week, on average, four SADC borders took around a day to cross, namely Beitbridge, Dedza/Calomue OSBP, Groblersbrug, and Kasumbalesa (the worst affected, taking nearly **two days** from the **Zambian side**). Other developments of note include **(1)** local weather disruptions, **(2)** increased congestion at Ramatlhabama, **(3)** processing delays at Skilpadshek, and **(4)** DRC mining suspension following a dam burst.

In summary, despite the throughput reductions recorded in October, the port environment remains in a far better operational state than earlier in the year, with sustained improvements now filtering through the system. South Africa's bulk cargoes are up by **↑5,8% YTD**, while the container sector is up by **↑2,5% YTD**. This momentum aligns with recent interventions outlined by Transnet CEO Phillips, who emphasised the renewed investment focus following the **R8 billion allocation to Transnet for infrastructure in the MTBPS** and the conditional **R47 billion** government guarantee of 2023 aimed at structural reform and accountability.[6] Moreover, the introduction of new equipment, including four remotely operated cranes at Pier 2, further illustrates the operational shift underway. Collectively, these reforms and technological upgrades suggest that, although volumes have normalised after September's records, the broader trajectory remains positive, supported by a more stable, better-governed, and increasingly modernised ports system.

[6] Cokayne, R. 12/11/2025. Transnet 'gets' R8bn for infrastructure corridors.

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1. Ports Update

This section provides an overview of the flow of containerised cargo through our commercial ports.

a. Container flow overview

The following tables indicate the container flows reported for the last seven days. The reporting aligns with TPT's cycle, which runs from Monday to Sunday.

Table 2 – Container Ports – Weekly flow reported for 10 to 16 November (measured in TEUs)

7-day flow reported (10/11/2025 – 16/11/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 513	31 588	↓9%
New Pier (Pier 1)	2 010	14 068	↓6%
Cape Town Container Terminal	1 113	7 791	↓16%
Ngqura Container Terminal	2 083	14 578	↑4%
Port Elizabeth Container Terminal	44	311	↑29%
Other	674	4 721	↓5%
Total	**10 437**	**73 057**	**↓6%**

Source: Calculated from TPT, 2025. Updated 16/11/2025.

A decreased average of **~10 437 TEUs** (**↓6%**) was handled per day for the last week (*10 to 16 November, Table 2*). Throughput was consequently below the projected average of **~11 610 TEUs** (**↓10%** actual versus projected).

For the coming week, an increased average of **~11 610 TEUs** (**↑11%**) is predicted to be handled (*17 to 23 November*, *Table 3*).

Inclement weather, vacant berths, and equipment challenges mainly characterised port operations.

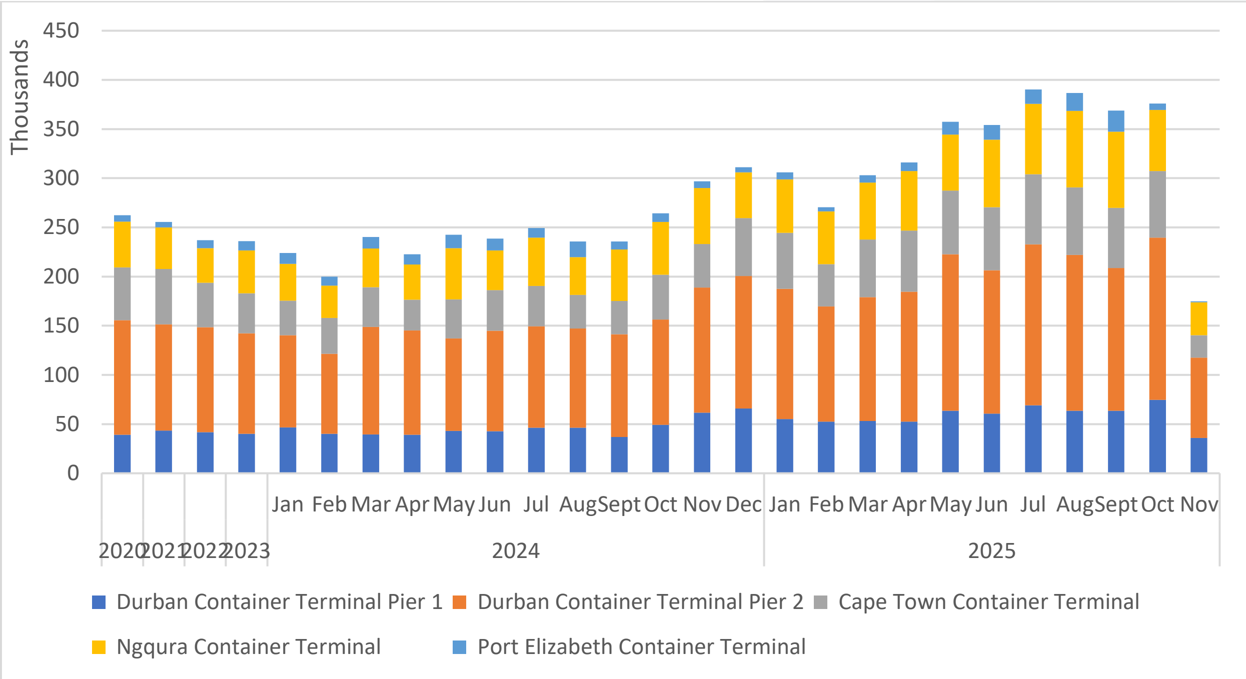
Table 3 – Container Ports – Weekly flow projected for 17 to 23 November (measured in TEUs)

7-day flow projected (17/11/2025 – 23/11/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 421	30 947	↓2%
New Pier (Pier 1)	1 695	11 863	↓16%
Cape Town Container Terminal	2 123	14 859	↑91%
Ngqura Container Terminal	2 159	15 110	↑4%
Port Elizabeth Container Terminal	381	2 665	↑757%
Other	832	5 825	↑23%
Total	**11 610**	**81 269**	**↑11%**

Source: Calculated from TPT, 2025. Updated 16/11/2025.

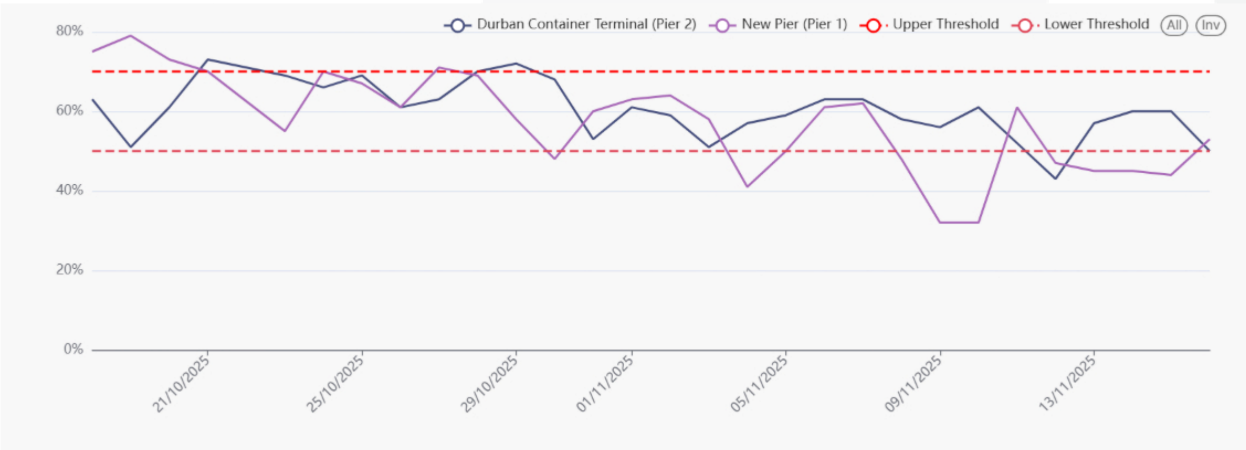
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2025, and updated 16/11/2025.

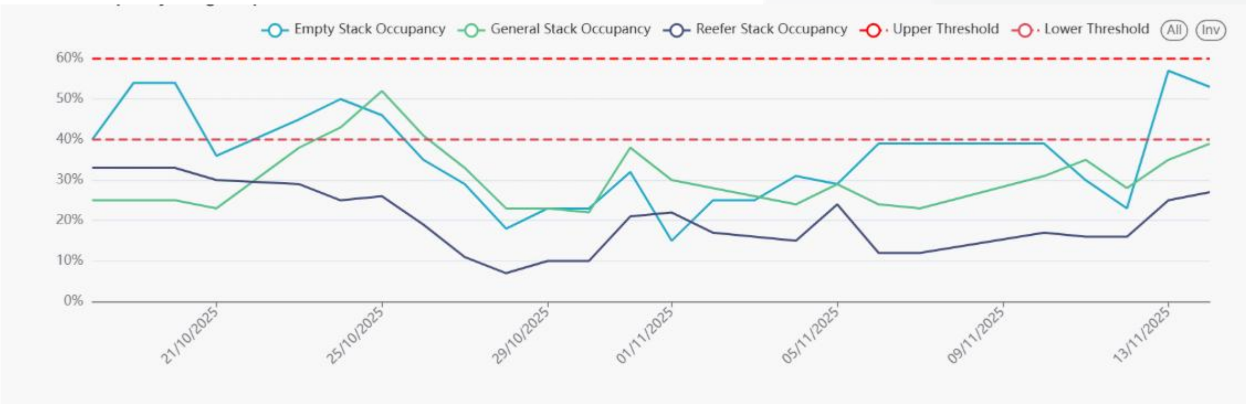
Figure 4 – Stack occupancy in DCT, general-purpose containers (17 October to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 16/11/2025.

The following figure shows daily stack occupancy in Cape Town over a similar period.

Figure 5 – Stack occupancy in CTCT, GP, reefer, and empty stack (17 October to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 16/11/2025.

b. TNPA: October update

TNPA has released consolidated port statistics for October[7], with the latest figures somewhat less encouraging compared to previous months, although the cyclical nature of the industry was apparent. In summary, the headline figures indicate that:

- Container throughput in October decreased by **↓32%** (m/m), but increased annually by **↑5%** (y/y).
- Total bulk cargo also decreased monthly by **↓32%** (m/m) and annually by **↓3%** (y/y).
- Vehicles decreased monthly by **↓46%** (m/m), but increased annually by **↑9%** (y/y).

The following table shows the respective changes versus September:

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

	Sep	Oct	Movement	% change
Containers (TEUs)	**484 228**	**329 164**	**-155 064**	**-32%**
Landed	234 336	158 615	-75 721	-32%
Shipped	249 892	170 549	-79 343	-32%
Dry bulk (MT)	17 857 425	12 316 151	-5 541 274	-31%
Liquid bulk (MT)	4 075 415	2 665 558	-1 409 857	-35%
Breakbulk (MT)	696 944	443 167	-253 777	-36%
Vehicles (Units)	114 484	61 311	-53 173	-46%
Total cargo (excl. Vehicles)	**22 629 784**	**15 424 876**	**-7 204 908**	**-32%**

Source: TNPA, updated 14/11/2025.

Transnet Port Terminals handled **329 thousand containers** and **15,4 million metric tonnes** of **bulk** cargo during October, which is significantly below the levels of the record throughput of last month. Vehicle throughput also decreased substantially after last month's record of **114 484 units** moved through our ports, coming in at **61 311 units**. Compared to yearly trends, the movement is much more aligned cyclically, as evidenced by the following table:

[7] Transnet. 2025. Port statistics.

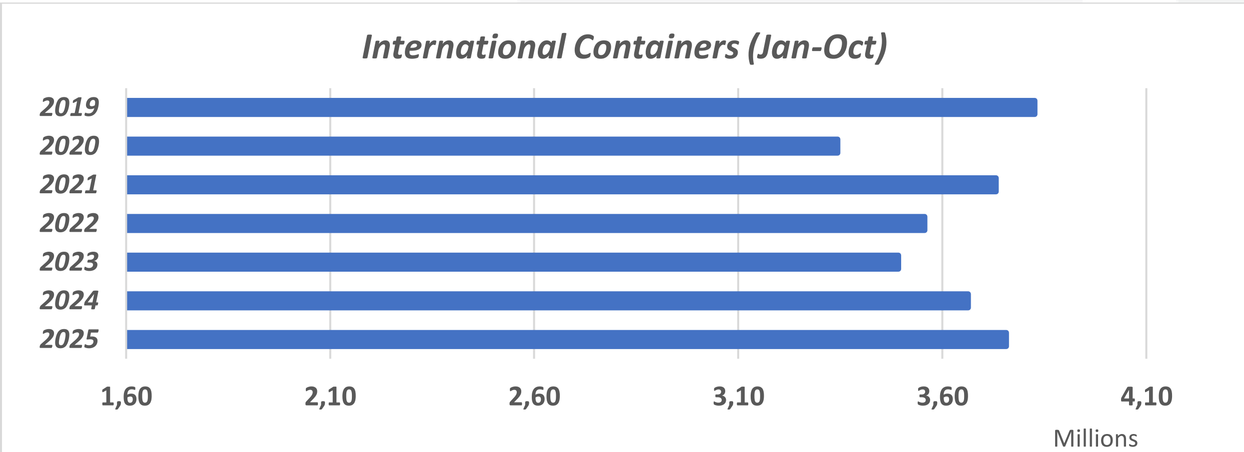
Table 5 – TNPA – Cyclical volume and growth: October 2019, 2024, and 2025

	2019	2024	2025	% 19 –'25	% '24-'25
Containers (TEUs)	**387 616**	**314 680**	**329 164**	**-15%**	**5%**
Landed	196 680	156 290	158 615	-19%	1%
Shipped	190 936	158 390	170 549	-11%	8%
Dry bulk (MT)	14 671 423	12 667 473	12 316 151	-16%	-3%
Liquid bulk (MT)	3 841 437	2 628 067	2 665 558	-31%	1%
Breakbulk (MT)	319 830	626 931	443 167	39%	-29%
Vehicles (Units)	67 649	56 384	61 311	-9%	9%
Total cargo (excl. Vehicles)	**18 832 690**	**15 922 471**	**15 424 876**	**-18%**	**-3%**

Source: TNPA, updated 14/11/2025.

Only dry bulk (**↓3%**, y/y) and breakbulk (**↓29%**) are down annually; whereas containers (**↑5%**), liquid bulk (**↑1%**) and vehicle throughput (**↑9%**) have increased compared to October 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 **↑5,8% YTD**. However, despite the improved cyclical numbers, YTD port volumes remain down by **↓4,4%** versus 2019. For containers, the YTD has improved to **↑2,5%**, after being down by **↓4,2%** just four months ago in June, as illustrated by the following year-to-date for containers to October:

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



Source: TNPA, updated 14/11/2025.

Despite the sharp month-on-month reductions following September's exceptional highs, the latest figures remain broadly consistent with expected cyclical patterns. Containers, bulk cargoes, and vehicles continue to track close to – or in some cases above – last year's levels, with YTD container growth now firmly positive and the recovery in several cargo categories sustained. The October slowdown, therefore, reflects seasonal normalisation rather than a reversal in the underlying gains observed across the network.

c. Summary of port operations

i. Weather and other delays

- Over 20 operational hours were conceded at the Port of Cape Town this week due to adverse weather conditions.
- Equipment challenges and bad weather prevented optimal operational performance in Durban.

- Inclement weather, vacant berths, and high swells ensured operational disruptions at our Eastern Cape Ports.
- Marine equipment challenges proved to be the primary operational constraint at the Port of Richards Bay.

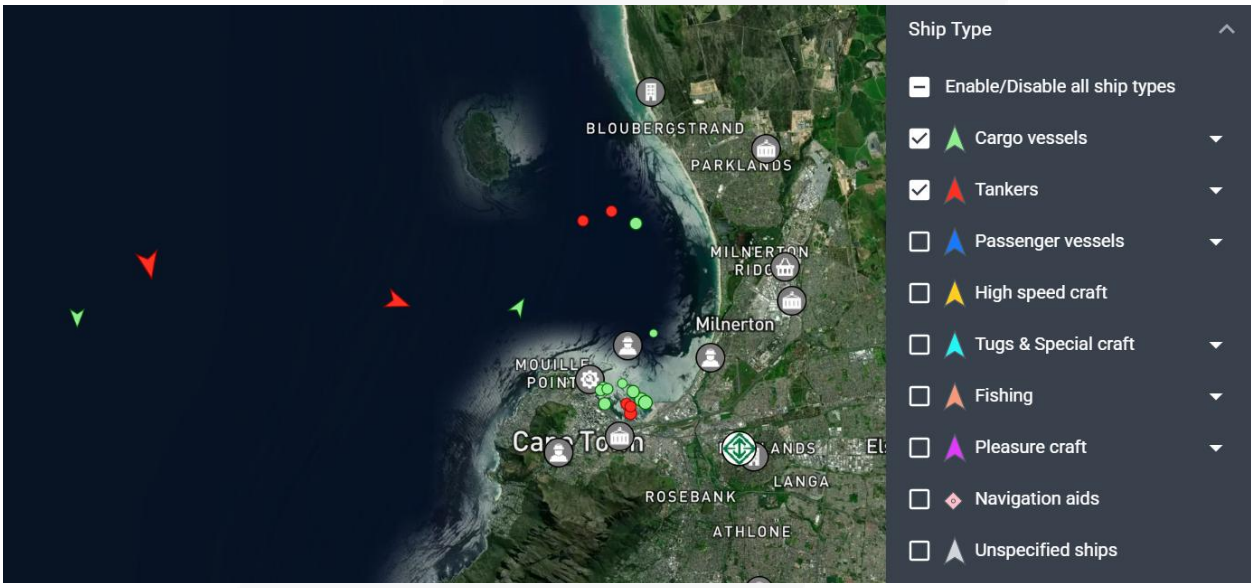
ii. Cape Town

On Thursday, CTCT recorded two vessels at berth and one at anchor, as strong winds, dense fog, and equipment challenges proved to be the primary operational constraints at the port. To contextualise this, the terminal conceded over 20 operational hours this week due to adverse weather. On the landside, between Monday and Friday, the terminal managed to service at least 4 422 trucks while handling approximately 224 rail units. On the waterside, the terminal executed approximately 4 875 container moves across the quay during the same period. Additionally, this week, the terminal operated with **eight STS cranes**, between **27-29 RTGs**, and approximately **59 hauliers**.

On Tuesday, CTMPT had one vessel at berth, with zero vessels waiting at outer anchorage. In the previous 24 hours, the terminal managed to handle 1 461 tons on the waterside, while servicing around 235 trucks on the landside. Stack occupancy figures were recorded at 0% for the general stack, 0% for the reefer stack, and 12% for the empty stack. The next vessel destined for the terminal is scheduled to arrive around 17 November.

Between 10 and 16 November, the FPT terminal handled seven vessels: one multi-cargo, two container, and four layby vessels. Berth occupancy during this period was recorded at 78%. The terminal planned to handle six more vessels between 17 and 23 November, with another six vessels scheduled between 24 and 30 November. The terminal conceded around 30 operational hours this week due to adverse weather conditions.

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



Source: Marine Traffic. Updated 16/11/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, with three vessels at anchor. Between Monday and Friday, the terminal executed at least 5 743 gate moves and 422 rail moves on the landside. The **TTT** for the week was again significantly down and **~38 minutes on average** (**↓31%**, w/w), and the average **staging time** was **~38 minutes** (**↓5%**). Additionally, the terminal moved over 5 500 TEUs across the quay on the waterside during the same period. The terminal had between **three and four** (out of seven) **STS cranes** and around **13-14** (out of 25) **RTGs** available for the most significant part of the week. STS crane availability thus roughly sat at 50% for the week, with RTG availability roughly sitting at 54%.

Pier 2 had three vessels on berth and one at anchorage on Thursday, as equipment breakdowns and adverse weather prevented optimal operational performance this week. The terminal operated with **4** to **11 gangs** and moved over **10 500** containers across the quay between Monday and Friday on the waterside. Approximately **13 447** gate moves were executed on the landside during the same period. The **average TTT** for the week was significantly reduced to **~60 minutes** (**↓41%**, w/w), and the average staging time was also down to **~32 minutes** (**↓66%**). Approximately 2 047 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **68** and **70** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **64%** during this period.

Durban's MPT terminal recorded three vessels at berth on Thursday and none at outer anchorage. Stack occupancy for containers was recorded at 21% and the breakbulk stack at 20%. In the preceding 24 hours, 492 containers and 2 143 tons of breakbulk were handled on the waterside. On the landside, 238 container trucks were serviced at a TTT of ~28 minutes. Additionally, 39 breakbulk trucks were serviced during this period. During this period, two cranes, eight reach stackers, eight forklifts, and 19 ERFs were in operation. The third crane (Crane 06) went out of service towards the end of the week but is anticipated to return to operations before the weekend. The latest reports from the technical team suggest that Crane 01 will be taken out of commission early next week for planned maintenance. Additionally, the fourth crane is still on track to return to service towards the end of December.

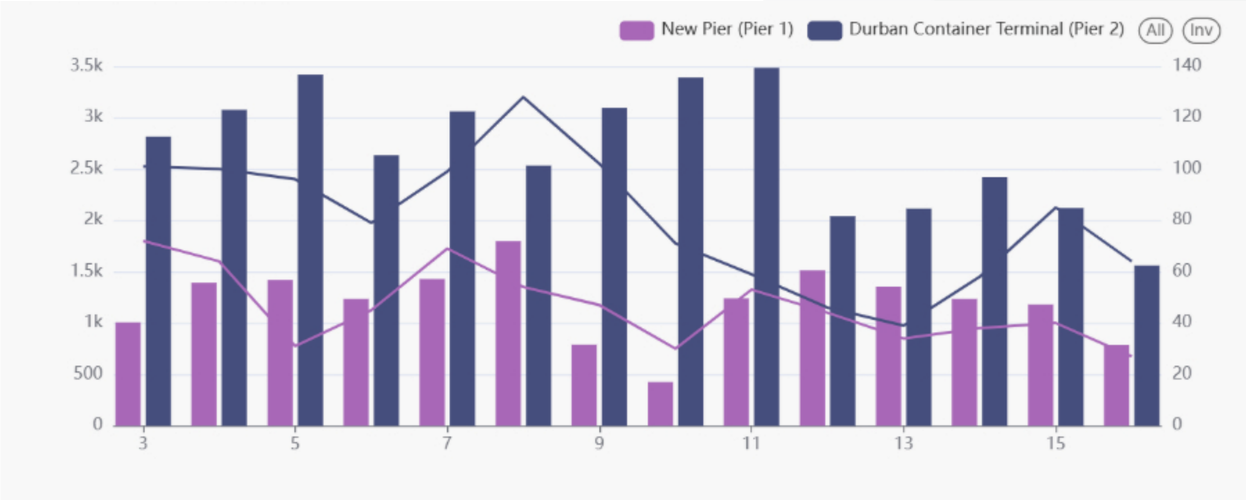
On Thursday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with one at anchorage. In the preceding 24 hours, the terminal handled 2 318 road units and 264 units on rail on the landside, while 2 019 units were handled on the waterside. Overall stack occupancy was recorded at 97%, with 60% recorded at Q+R and 70% at G-berth. The terminal had 151 abnormal loads and managed to handle 36. The latest reports from TPT suggest that the terminal managed to hold a total of 16 755 units on the waterside for the entire week.

Lastly, for Durban, the announcement of the **R20 billion Insimbi Ridge Logistics Precinct** near Durban marks a significant step in modernising South Africa's freight infrastructure, with direct links to the national rail network, two truck-staging zones and planned operations from 2027. It represents the country's first large-scale, privately-funded inter-modal freight corridor development, designed to relieve pressure on the Port of Durban and the N3 corridor and to serve as a replicable model for future public-private logistics infrastructure investment.[8]

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.

[8] Comins, L. 11/11/2025. R20bn Durban-Gauteng logistics precinct launches.

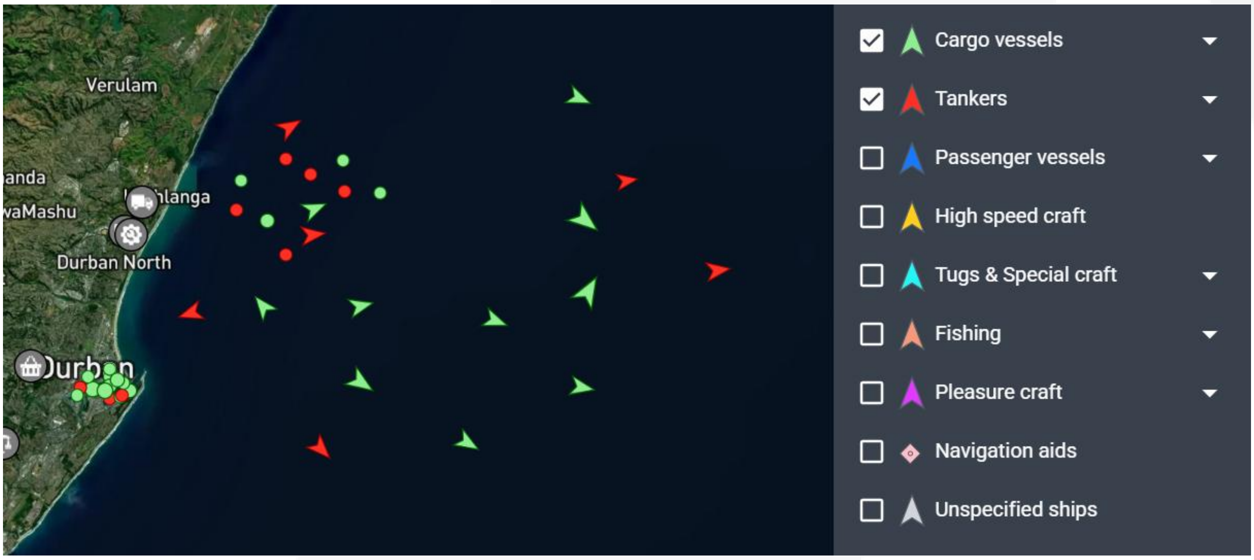
Figure 8 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 16/11/2025.

The queue of container vessels waiting outside Durban has remained stable this week. On Monday evening (17 November), **two** container vessels were waiting outside at anchorage for Pier 1, **two** for Pier 2, and **two** for Point. The queue of dry (**one**), liquid (**five**), and breakbulk (**two**) vessels has remained steady from last week. The following snapshot shows the current status quo:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 16/11/2025 at 14:00.

iv. Richards Bay

On Thursday, the Port of Richards Bay had 14 vessels at anchor and 19 on the berth, translating to six vessels at DBT, six at MPT, six at RBCT, and one at the liquid bulk terminal. Two tugs and one pilot boat were deployed to support marine resources towards the end of the week. Marine equipment challenges proved to be the primary operational constraint at the port this week.

The daily average coal throughput for the week decreased slightly after last week's highs and averaged around **182 000 tons** (**↓16%**, w/w) a day. An average of **22 trains** was serviced on the landside (up by **four** from last week), and right on target (of 22 trains).

v. Eastern Cape ports

On Thursday, NCT recorded three vessels on berth and two at anchor, with one vessel drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. For the majority of the week, the Ports of PE and Coega shared a pilot boat due to some challenges with their waterside equipment. Stack occupancy figures were recorded at 16% for reefers and 16% 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 1 581 TEUs and 90 reefers on the waterside, despite being windbound for around six hours. Approximately 488 trucks were processed on the landside at a TTT of ~31 minutes. For the most significant part of the week, the terminal had between 6 and 7 STS cranes, between 22-25 RTGs, and around 51-55 hauliers in service.

On Thursday, GCT had zero vessels 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, zero trucks were processed on the landside, while no volumes were handled across the quay on the waterside. Stack occupancy was recorded at 2% for the general stack and 0% for reefers. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and eight straddles available.

On Thursday, the Ro-Ro terminal recorded zero vessels at berth and none at anchor. In the 24 hours between Wednesday and Thursday, the terminal managed to handle 671 units, resulting in a stack occupancy figure of 41%.

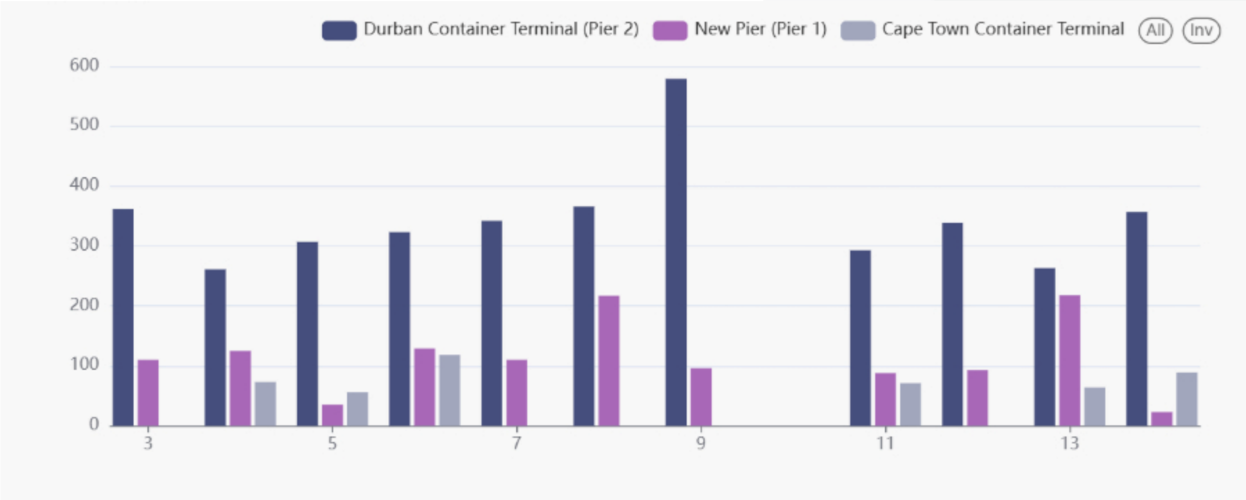
vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that locomotive issues created some delays on the ConCor line between Johannesburg and Durban this week. The planned rail maintenance shutdown on the Container Corridor (NATCOR) began on 18 November and is expected to run until 27 November.

Between 18 and 23 November, TFR can operate only one block train per day, carrying up to 100 TEU, after which the corridor will be fully closed until completion of the works. As at 19 November, 887 import containers were awaiting rail uplift at DCT, including 237 units destined for City Deep. Cargo owners seeking to divert delayed rail cargo to road should liaise with their TFR customer-care representative or the relevant shipping line.

Further, trains on the line between City Deep and Mafikeng started moving quickly this week after the bottlenecks experienced on the line last week. Towards the end of the week, DCT Pier 2 had 248 ConCor units on hand with a dwell time of 72 hours and 446 over-border units with a dwell time of 96 days.

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



Source: Calculated using data from Transnet, 2024. Updated 16/11/2025.

In the last week (*10 to 16 November*), rail cargo on the ConCor line out of Durban was reported at **3 464** containers, down by **↓3%** from the previous week's **3 573** containers.

vii. Other updates

The latest Southern Africa terminal and service update for week 46 provides good reading for most of our major South African terminals. No waiting times were recorded at CTCT, CTMPT, PECT, NCT, or DCT Pier 2. However, the situation at CTCT will most likely be affected by the adverse weather experienced over the weekend, as well as the poor weather conditions expected next week. Additionally, current waiting times at DCT Pier 1 are around 5-7 days due to some operational challenges experienced.

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 (*10 to 16 November*). 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

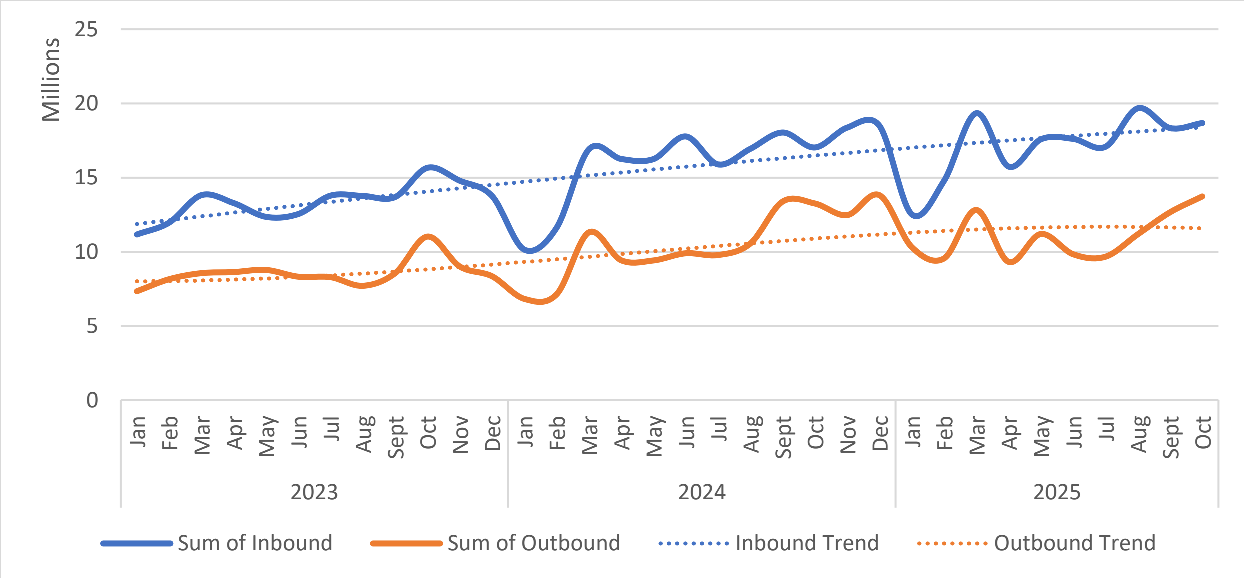
Flows	**Daily Ave.**	**Weekly Ave.**	**Change** (w/w)
Volume inbound	**701 104**	**4 907 728**	**↓14%**
Volume outbound	**398 461**	**2 789 228**	**↓15%**
Total	**1 099 565**	**7 696 956**	**↓15%**

Courtesy of ACOC. Updated: 16/11/2025.

International air cargo to and from South Africa decreased substantially as the daily average of air cargo handled amounted to **~701 000 kg** inbound (**↓14%**, w/w) and **~398 000 kg** outbound (**↓15%**). Nevertheless, despite the reduction in volumes, the current levels continue to trend significantly above last year's level (**~↑11%**) and the comparative levels of pre-pandemic 2019 (**~↑10%**).

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

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



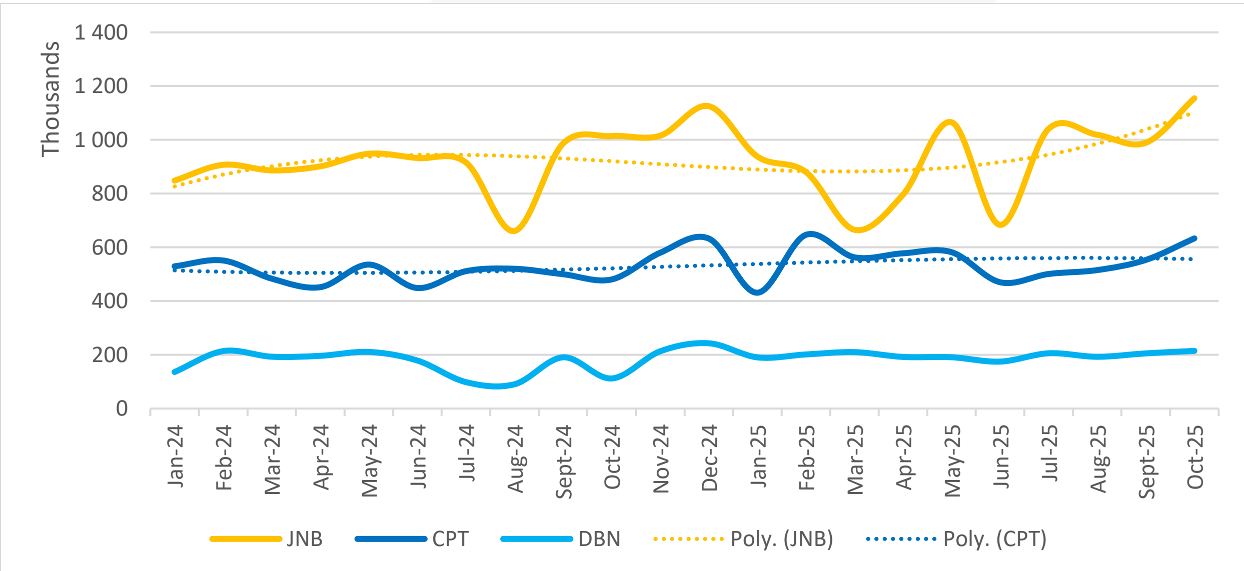
Calculated from ACOC. Updated: 16/11/2025.

Operationally, OR Tambo International Airport is experiencing repeated infrastructure failures ahead of the G20 Leaders' Summit, including outages in power and water, broken baggage-handling systems and delayed fuelling, which industry sources say are eroding confidence in the airport's readiness.[9]

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: 16/11/2025.

[9] Kaiser, H. 19/11/2025. OR Tambo International Airport faces chaos before G20.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*10 to 16 November)*, movements along the N4 corridor increased for road transport, while reporting for rail transport was sparse.

- Truck volumes through the border post increased to around **1 451 HGVs per day** (**↑9%**, w/w).
- Queue times decreased slightly to an average of **~6,1 hours** at the border.
- The average processing time also decreased slightly to an average of **~6,1 hours** per crossing.

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

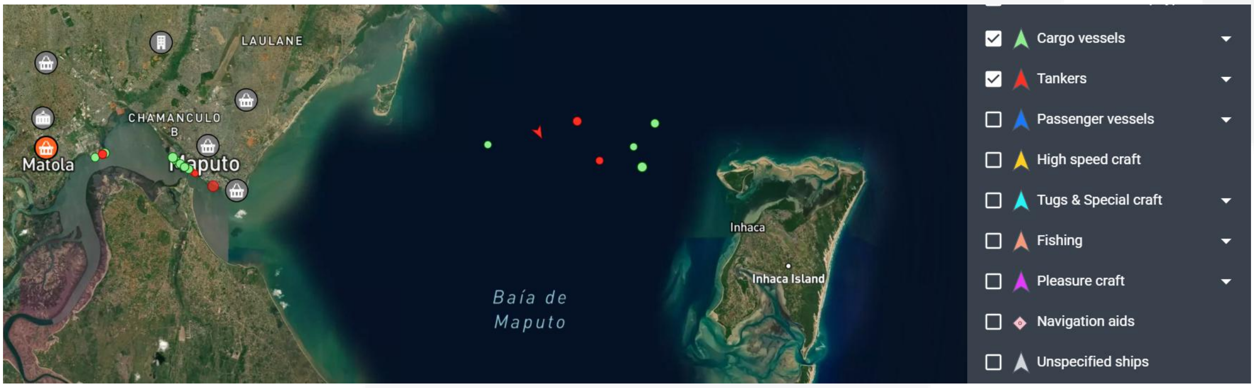
Table 7 – Lebombo border post update

	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	1 451	1 419	1 037	236	30	82	34	282	**n/a**	**n/a**	**n/a**	**n/a**
% (w/w)	**9%**	**8%**	**10%**	**7%**	**-15%**	**-5%**	**-31%**	**12%**	**n/a**	**n/a**	**n/a**	**n/a**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 16/11/2025.

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 16/11/2025 at 14:00.

b. SADC cross-border and road freight update

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

- Overall, the average queue time increased by approximately **three-quarters of an hour** from last week, while transit time increased by about **half an hour**.
- The median border crossing times at South African borders increased by roughly **an hour and a half**, averaging **~12,7 hrs** (**↑12%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) also increased by around **half an hour**, averaging **~5,7 hrs** (**↑10%**).

1. **Weather-related disruption:**
   - Heavy flooding rendered Newcastle inaccessible earlier in the week, with transporters advised to avoid the town due to extensive water damage.

2. **Ramatlhabama congestion:**
    - Queue lengths at Ramatlhabama surged from 110 to 268 vehicles, driven by constraints at Groblersbrug (insufficient parking, single-lane bridge) and compounded by lengthy queues and full scanning requirements by ZIMRA at Beitbridge.
    - Drivers have been urged not to cut queues or leave vehicles unattended.
3. **Border processing delays at Skilpadshek:**
    - Additional operational challenges were reported at Skilpadshek/Botswana Unified Revenue Service (BURS), particularly concerning EDI responses.
4. **DRC mining suspension:**
    - Authorities in the DRC halted operations at a Chinese-owned mining site following a dam burst that flooded three Lubumbashi neighbourhoods with contaminated water.

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

Table 8 – Delays[10] summary – South African borders[11] (both directions)

Border Post	Direction	HGV[12] 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	558	30,7	8,3	31,0	16 740	3 906
Beitbridge	Zimbabwe-SA	532	13,3	2,2	13,2	15 960	3 724
Groblersbrug	SA-Botswana	252	29,4	2,3	29,0	7 560	1 764
Martin's Drift	Botswana-SA	229	3,6	0,4	3,4	6 870	1 603
Kopfontein	SA-Botswana	205	12,3	2,3	12,2	6 150	1 435
Tlokweng	Botswana-SA	21	0,6	0,2	0,4	630	147
Vioolsdrift	SA-Namibia	30	4,1	1,1	4,1	900	210
Noordoewer	Namibia-SA	20	1,9	0,4	1,5	600	140
Nakop	SA-Namibia	30	2,9	0,4	2,5	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,4	1,1	600	140
Skilpadshek	SA-Botswana	296	12,3	4,1	12,2	8 880	2 072
Pioneer Gate	Botswana-SA	69	0,0	0,0	0,0	2 070	483
Ramatlhabama	SA-Botswana	200	4,7	1,0	4,4	2 280	532
Ramatlhabama	Botswana-SA	76	0,4	0,1	0,3	6 000	1 400
Lebombo	SA-Mozambique	1 401	6,1	1,6	6,1	42 030	9 807
Ressano Garcia	Mozambique-SA	1 337	2,4	0,2	2,3	40 110	9 359
Sum/Average		5 276	7,9	1,6	7,7	158 280	36 932

Source: TLC, FESARTA, & Crickmay, week ending 09/11/2025.

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	17,2	4,2	16,9	9 600	2 240
Central Corridor	798	0,1	0,0	0,1	23 940	5 586
Dar Es Salaam Corridor	1 819	14,1	1,7	13,9	45 570	10 633
Maputo Corridor	2 738	4,3	0,9	4,2	82 140	19 166

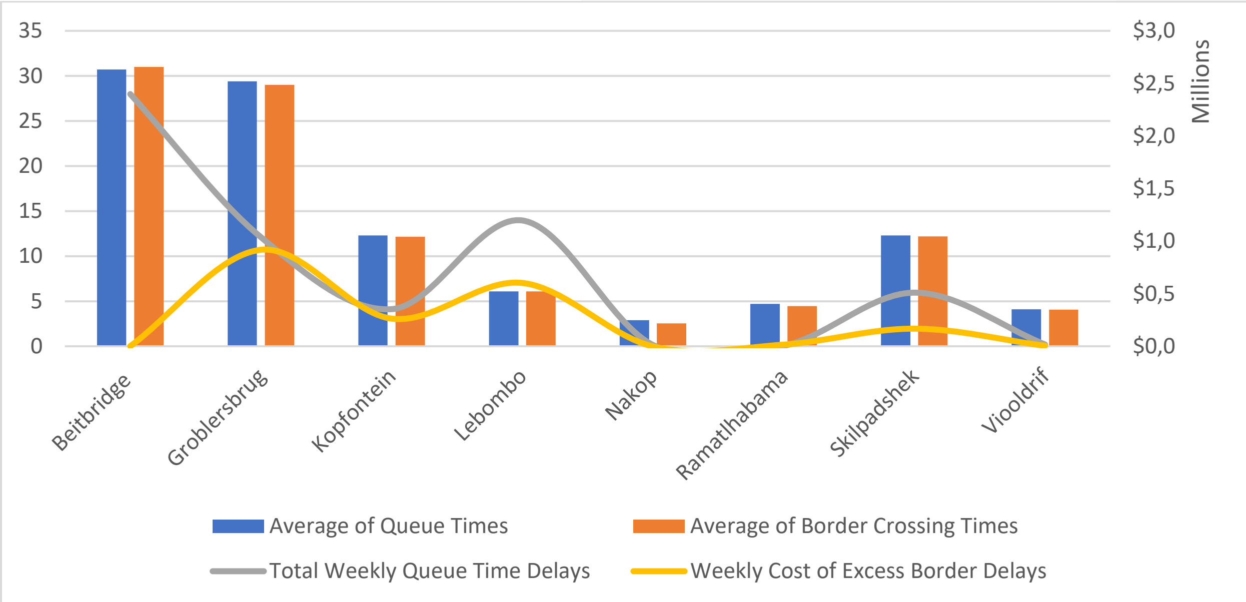
[10] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[11] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[12] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 528	15,7	2,9	15,7	105 840	24 696
Northern Corridor	2 817	0,6	0,0	0,6	92 520	21 588
Trans Caprivi Corridor	897	4,4	1,1	4,2	26 910	6 279
Trans Cunene Corridor	100	2,5	0,6	2,3	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700
Trans Oranje Corridor	116	12,4	1,3	12,2	3 480	812
Sum/Average	**13 360**	**6,6**	**1,2**	**6,5**	**399 810**	**93 289**

Source: TLC, FESARTA, & Crickmay, week ending 09/11/2025.

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

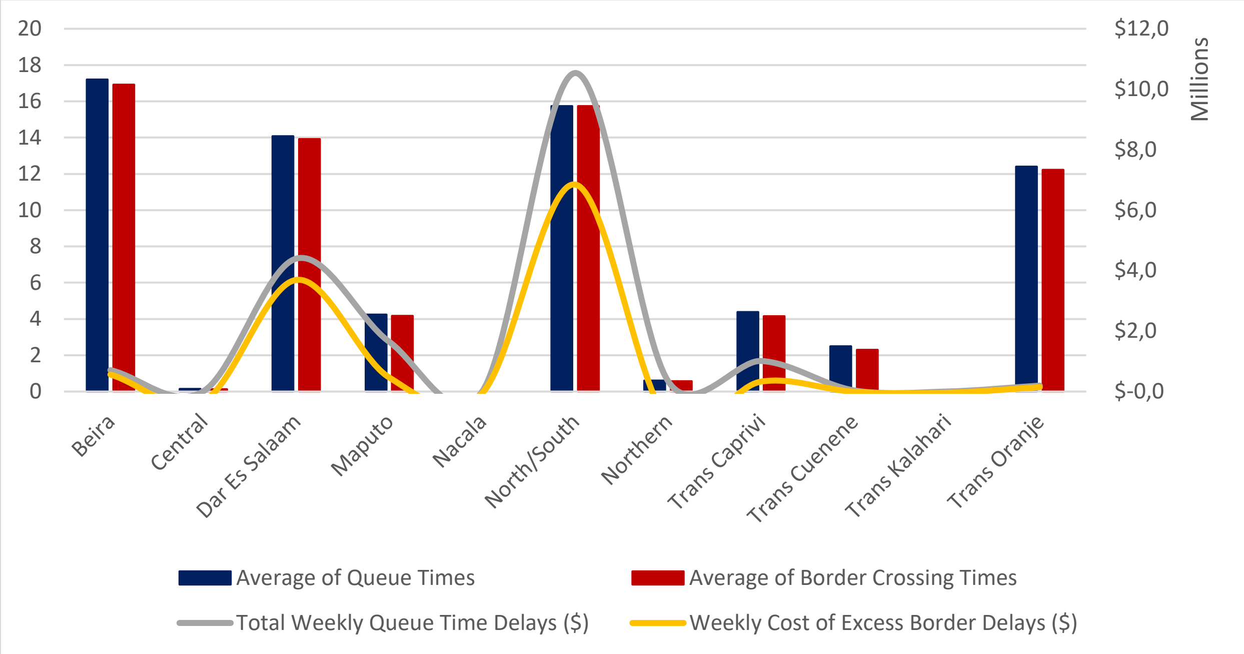
Figure 14 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 09/11/2025.

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 09/11/2025.

In summary, cross-border queue time averaged **~6,5 hours** (up by **~0,7 hours** from the previous week's **~5,9 hours**), indirectly costing the transport industry an estimated **$18,9 million** (**R325 million**). Furthermore, the week's average cross-border transit times also hovered around **~6,5 hours** (up by **~0,6 hours** from the **~5,9 hours** recorded in the previous report), at an indirect cost to the transport industry of **$10,6 million** (**R183 million**). The total indirect cost for the week amounts to an estimated **~$29,5 million** (**R507 million**, down by **↓1,5%** from the **~R515 million** in the previous report).

4. International Update

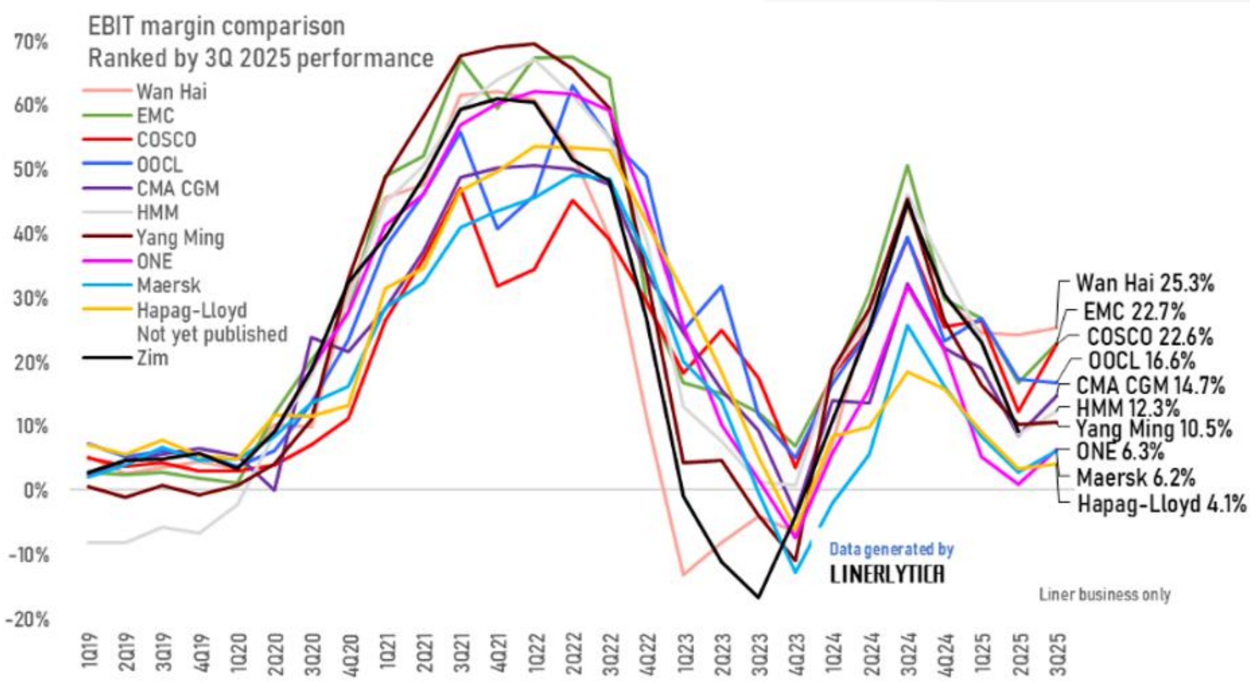
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Carrier earnings and container industry summary

Global liner earnings improved in the third quarter; however, the fourth quarter is showing signs of reversal, with the composite CCFI rate down around **↓14%** quarter-on-quarter. Transpacific rates are falling sharply amid weakening demand and lower capacity utilisation, whereas Asia–Europe rates remain relatively stable, thanks in part to port congestion limiting supply growth. Intra-Asia short-haul rates have held up better (only **~↑1%** down) with volume growth, and Asian carriers continue to outperform European peers in EBIT margins.

Figure 16 – EBIT margin by quarter (2019 to 2025)



Source: Linerlytica

Meanwhile, new ship orders have pushed the carrier orderbook to a post-Global-Financial-Crisis high at **34%**, with 2028 deliveries forecast at a record **4,4 million TEU** — heightening forward over-supply risk.

Elsewhere, rounding off developments in the industry:

1. **Global port congestion:**
   a. Global port congestion continues to be moderate – currently affecting **2,74 million** (or **8,3%**) of the total fleet.[13]
   b. Chokepoints are currently evident in the Shanghai/Ningbo cluster, with **84 vessels** at anchorage and a queue-to-berth ratio of **1,11**. Northern Europe and Spain are other areas where minor chokepoints are apparent.
2. **US tariffs soften on key food imports:**
   a. The Trump Administration has announced the removal of reciprocal tariffs on a wide range of agricultural products – such as coffee, tea, tropical fruits, bananas, oranges, tomatoes and beef – effective retroactively from 13 November 2025.[14]
   b. This adjustment reflects the "substantial progress" in reciprocal-trade framework deals and addresses domestic concerns around food-price inflation while signalling a shift away from the earlier tariff-intensive stance.[15]

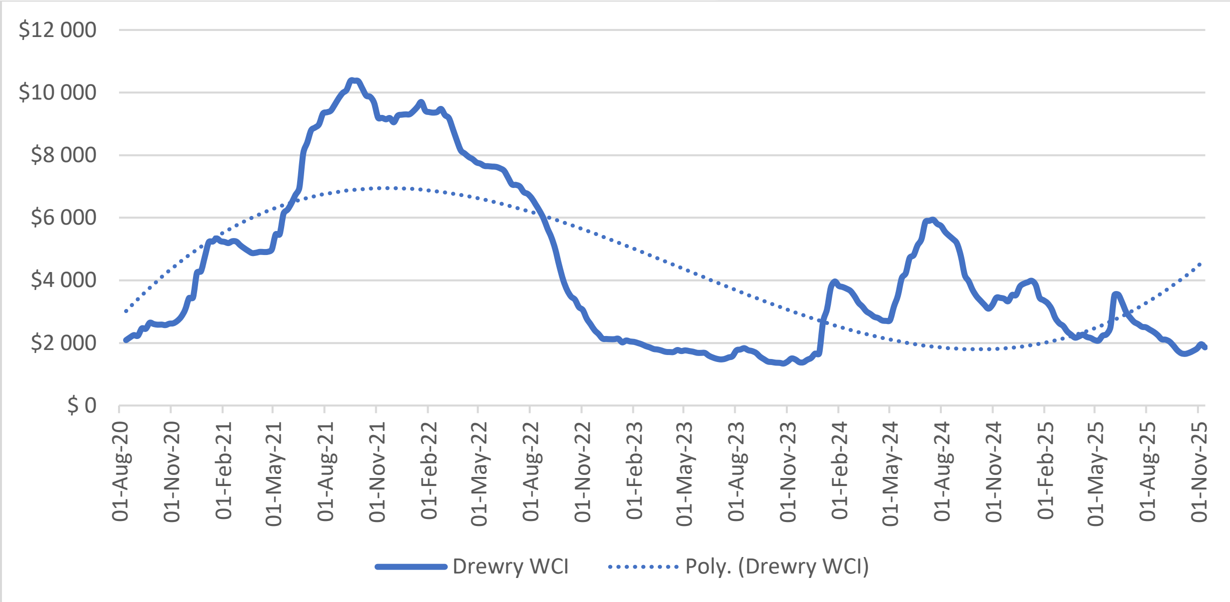
ii. Global freight rates

After four consecutive weeks of rate increases, the "*World Container Index*" (WCI) subsided again and is down by **↓5,1%** (or **$100**) to **$1 859 per 40-ft container**.[16] In particular, spot rates from Shanghai to New York slid **↓15%** and to Los Angeles fell **↓12%**, driven chiefly by weaker demand following early holiday-season imports. In comparison, Asia-Europe trades bucked the trend with minor gains of **↑3–4%**. Evidently,

[13] Linerlytica. 15/11/2025. Global Containership Port Congestion.
[14] Lennane, A. 17/11/2025. Tariffs on key food imports cancelled as White House softens on reciprocal trade.
[15] CFR. 17/11/2025. United States Cuts Key Tariffs.
[16] Drewry. 13/11/2025. World Container Index.

the selective discounts mentioned last week have fed into the spot market as the peak season has not been pronounced. The following figure, which spans an approximately similar timeframe as the carrier earnings listed above, is essentially a mirror of said figure:

Figure 17 – World Container Index (WCI)



Source: Calculated from Drewry

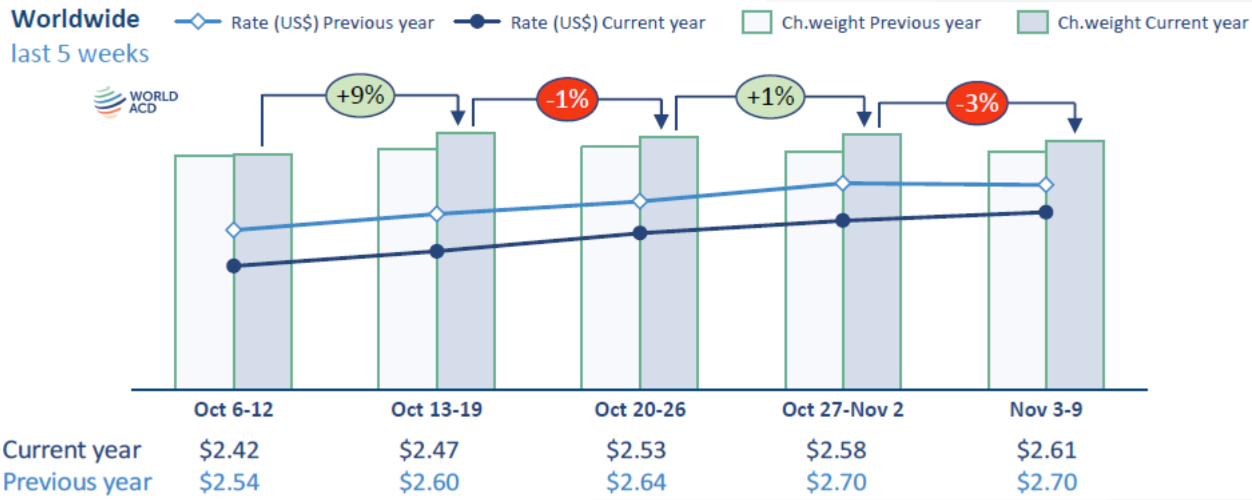
Elsewhere, the charter market remains stable, with the *Harpex Index* trading unchanged at **2 184 points**.[17]

b. Global air cargo industry

According to high-frequency metrics from World ACD, global air cargo conditions softened slightly in week 45. Worldwide tonnages fell by around **↓3%** week-on-week, with declines from all major origin regions, partly driven by national holidays in Japan and Malaysia. Capacity remained broadly stable as the seasonal fall in passenger belly space was offset by higher freighter deployment.

[17] Harpex. 14/11/2025. Harper Petersen Charter Rates Index.

Figure 18 – Chargeable weight and rates (last five weeks, % change)



Source: World ACD

Despite lower volumes, average spot rates rose by **↑1%** to **$2,78 per kilogram** globally, led by continued firming in the Asia Pacific (**↑2%**) and a sharp increase from Central and South America (**↑8%**). Market behaviour mirrors last year's seasonal pattern, although global rates remain around **↓4%** lower year-on-year.

In other aviation news, the European Union has approved the abolishment of its de minimis import threshold (currently **€150**) once its new customs-data hub becomes operational – anticipated in 2028. Meanwhile, policymakers expect e-commerce and logistics providers to pivot to alternate gateways and business models as one low-barrier channel closes and new ones emerge.[18] Lastly, the upcoming Black Friday and Cyber Monday surge in European e-commerce is expected to deliver significant volume gains for online retail platforms, but traditional haulage operators are unlikely to see proportional benefit.[19]

ENDS [20]

[18] Lennane, A. 14/11/2025. EU to end de minimis: but as one ecommerce door closes another will open.
[19] Goldstone, C. 18/11/2025. Black Friday and Cyber Monday ecommerce boom will bypass hauliers.

[20] **ACKNOWLEDGEMENT:**

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