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Cargo Movement Update #261[1]

Date: 23 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)	32 281	36 777	**69 058**	34 150	38 907	**73 057**	↓5%
Air Cargo (tons)	4 970	2 892	**7 862**	4 908	2 789	**7 697**	↑2%

Monthly Snapshot

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

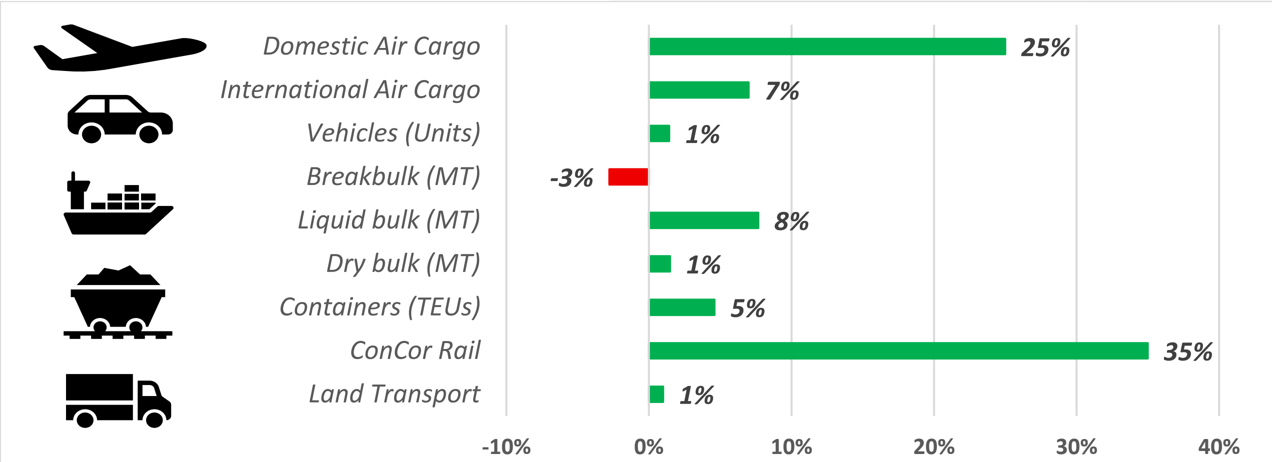
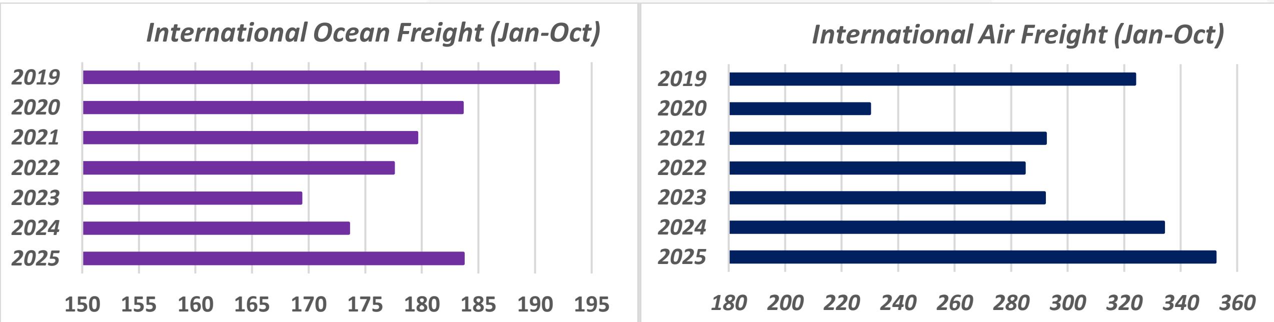


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~9 865 TEUs** was handled per day, with **~11 298 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 994** containers, down by **↓14%** from last week.
- Cross-border queue: **↑0,5 hrs**; transit: **↑0,2 hrs**; SA borders: **~12,0 hrs** (**↓5%**); SADC: **~5,7 hrs** (**unchanged**).
- Global carriers saw a rebound in profitability in Q3, with average operating margins rising to **↑13,7%**.
- Global spot rates were collectively stable this week (**↓0,4%** to **$1 852/40ft**) – despite divergent trades.
- Global air cargo markets strengthened as tonnages are up by **↑1%** (w/w) and spot rates by **↑4%** (w/w).

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *261st* 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 **9 865 TEUs** was handled daily, a decrease from **10 437 TEUs** the previous week.

Port operations were mainly impacted by adverse weather conditions, vacant berths, as well as equipment challenges and shortages. To put this into perspective, more than 80 operational hours were conceded at the Port of Cape Town this week due to strong winds, as equipment breakdowns and inclement weather prevented optimal operational performance in Durban. Adverse weather, vacant berths and equipment challenges ensured operational delays 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 the annual shutdown of the ConCor line commenced earlier this week and will continue until around 27 November. For the first six days of the shutdown, only one train will run on the line to transport the most urgent cargo. From next Monday, there will be a total shutdown where no trains will run on the line for the week. The latest reports from Maersk suggest that they are withdrawing the Peak Season Surcharge for certain regions and trade routes.

Global shipping developments this week point to softening operational performance and mounting supply–demand pressures. Schedule reliability slipped to **65,2%**, with average delays nearing **five days**, although year-on-year performance remains stronger. Market sentiment weakened as **TEU-mile demand growth fell below vessel supply**, weighing on freight rates, particularly on Transpacific routes. Scrapping remains historically low (only 14 vessels so far this year), while the orderbook has reached record levels, signalling future over-capacity risk. Freight rates were broadly stable, with the WCI marginally down, though lane-specific trends diverged. Carrier profitability improved in **Q3 2025** due to front-loading, reaching an average margin of **↑13,7%**, albeit uneven across operators.

International air cargo to and from South Africa bounced back after last week's dip. The daily average of air cargo handled amounted to **~710 000 kg** inbound (**↑1%**, w/w) and **~413 000 kg** outbound (**↑4%**). Consequently, the current levels continue to trend significantly above last year's level (**~↑14%**) and the comparative levels of pre-pandemic 2019 (**~↑13%**).

Air cargo markets continued to firm in November, led by strong trans-Pacific demand and rising Asia-origin spot rates ahead of the retail peak. While year-on-year comparisons remain distorted by last year's capacity crunch, underlying momentum is clearly improving, supported by structural shifts in sourcing and elevated high-tech demand.

In other aviation news, **(1)** US cargo is facing embargoes due to a shortage of jet fuel, and **(2)** Brussels Airport closed all outbound flights – but air cargo was fortunately mostly spared.

On the N4 corridor, trade decreased for road transport, while reporting for rail transport was sparse. Truck volumes through the border post decreased to around **1 372 HGVs per day** (**↓6%**, w/w). Queue times increased slightly to an average of **~6,3 hours** at the border. The average processing time also increased slightly to an average of **~6,2 hours** per crossing.

In the SADC region, cross-border road transport times – on average – increased this week. Overall, the average queue time increased by approximately **half an hour** from last week, while transit time increased by about **a quarter of an hour**. The median border crossing times at South African borders decreased by roughly **three-quarters of an hour**, averaging **~12,0 hrs** (**↓5%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) remained stable – averaging **~5,7 hrs** (**unchanged**). This week, on average, four SADC borders took around a day to cross, namely Beitbridge, Chirundu OSBP, Kasumbalesa (the worst affected, taking **two and a half days** from the **Zambian side**), and Katima Mulilo. Other developments of note include **(1)** Zimbabwe weather-related delays and law enforcement concerns, and **(2)** Asycuda system problems in Zambia resulting in delays.

In summary, this week's local container volume decline has somewhat coincided with a global downturn, as the overall sentiment in the market is slightly negative. For air cargo, the international flows to and from ORTIA remain high despite several lingering operational constraints. As the year continues to draw to a close, the time for reflection starts to gain momentum. Several positive developments continue to shed light on some structural improvement (including reform, new equipment, operational improvement and widespread industry collaboration); however, the industry (and indeed the broader economy) must remember that in most logistics industries (rail, ports mainly – as air cargo has been the lone shining light as far as volumes are concerned) are simply clawing back lost throughput – not material growth! Therefore, the gains must continue for the trade, transport, and logistics industry to continue to be a driver for economic growth and development.

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 17 to 23 November (measured in TEUs)

7-day flow reported (17/11/2025 – 23/11/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 239	36 670	↑16%
New Pier (Pier 1)	1 749	12 240	↓13%
Cape Town Container Terminal	207	1 449	↓81%
Ngqura Container Terminal	1 877	13 139	↓10%
Port Elizabeth Container Terminal	0	0	-
Other	794	5 560	↑18%
Total	**9 865**	**69 058**	**↓5%**

Source: Calculated from TPT, 2025. Updated 23/11/2025.

A very low average of **~9 865 TEUs** (**↓5%**) was handled per day for the last week (*17 to 23 November, Table 2*) – mainly because of the poor weather throughout the country. Throughput was consequently significantly below the projected average of **~11 610 TEUs** (**↓15%** actual versus projected).

For the coming week, an increased average of **~11 298 TEUs** (**↑15%**) is predicted to be handled (*24 to 30 November*, *Table 3*).

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

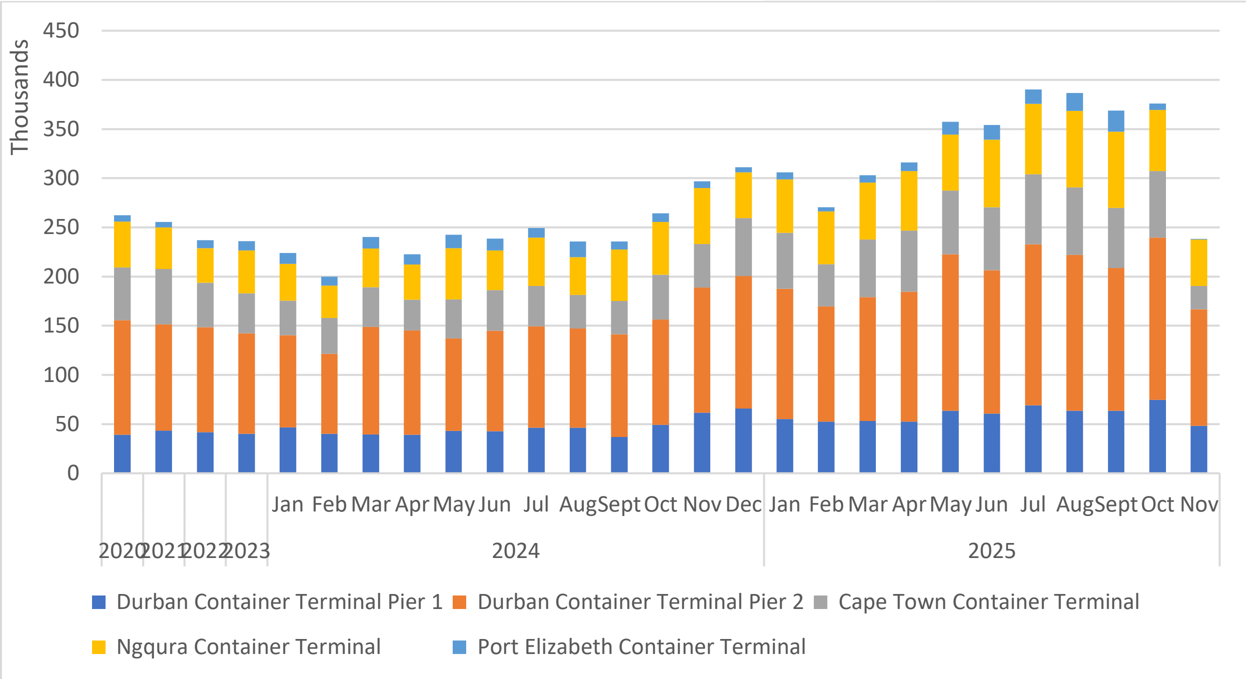
Table 3 – Container Ports – Weekly flow projected for 24 to 30 November (measured in TEUs)

7-day flow projected (24/11/2025 – 30/11/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 281	29 964	↓18%
New Pier (Pier 1)	1 641	11 487	↓6%
Cape Town Container Terminal	2 017	14 116	↑874%
Ngqura Container Terminal	2 053	14 368	↑9%
Port Elizabeth Container Terminal	390	2 728	-
Other	918	6 426	↑16%
Total	**11 298**	**79 089**	**↑15%**

Source: Calculated from TPT, 2025. Updated 23/11/2025.

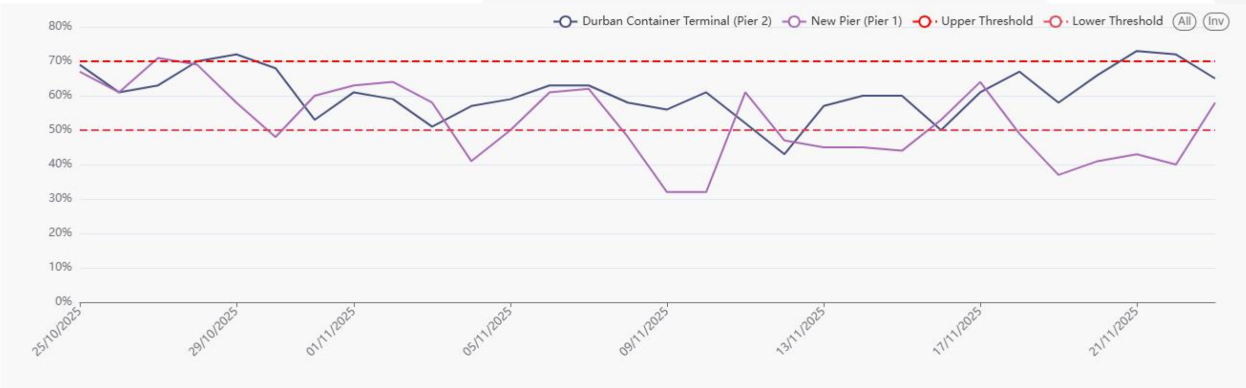
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2025, and updated 23/11/2025.

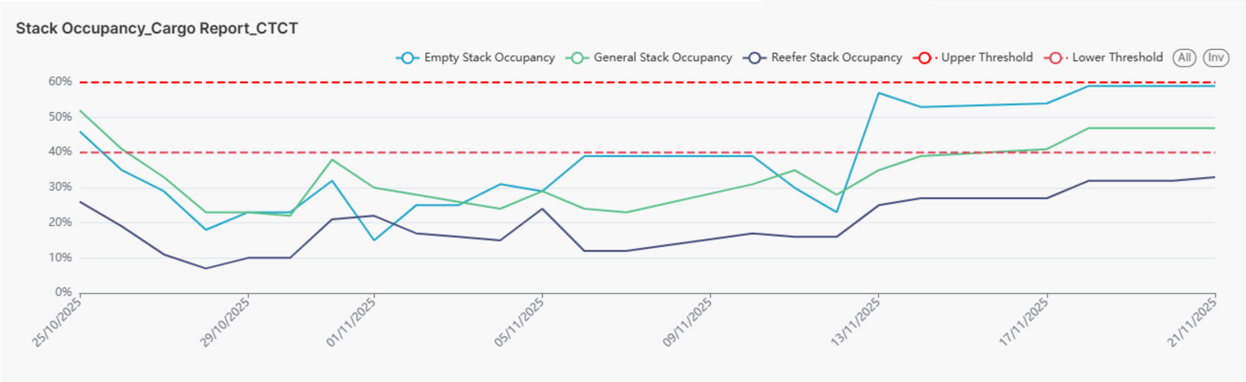
Figure 4 – Stack occupancy in DCT, general-purpose containers (25 October to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 23/11/2025.

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 (25 October to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 23/11/2025.

b. Summary of port operations

i. Weather and other delays

- More than 80 operational hours were lost at the Port of Cape Town this week due to strong winds.
- Equipment breakdowns and inclement weather prevented optimal operational performance in Durban.
- Adverse weather, vacant berths and equipment challenges ensured operational delays 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 Friday, CTCT recorded three vessels at berth and three at anchor, as strong winds and network challenges proved to be the primary operational constraints at the port. To contextualise this, the terminal conceded over 80 operational hours this week due to adverse weather. On the landside, between Monday and Friday, the terminal managed to service only around 383 trucks while handling approximately 81 rail units. On the waterside, the terminal executed approximately 823 container moves across the quay during the same period. Additionally, this week, the terminal had **eight STS cranes**, between **25 RTGs**, and approximately **59 hauliers** available. The latest reports from TPT suggest that the strong winds are expected to persist through the weekend.

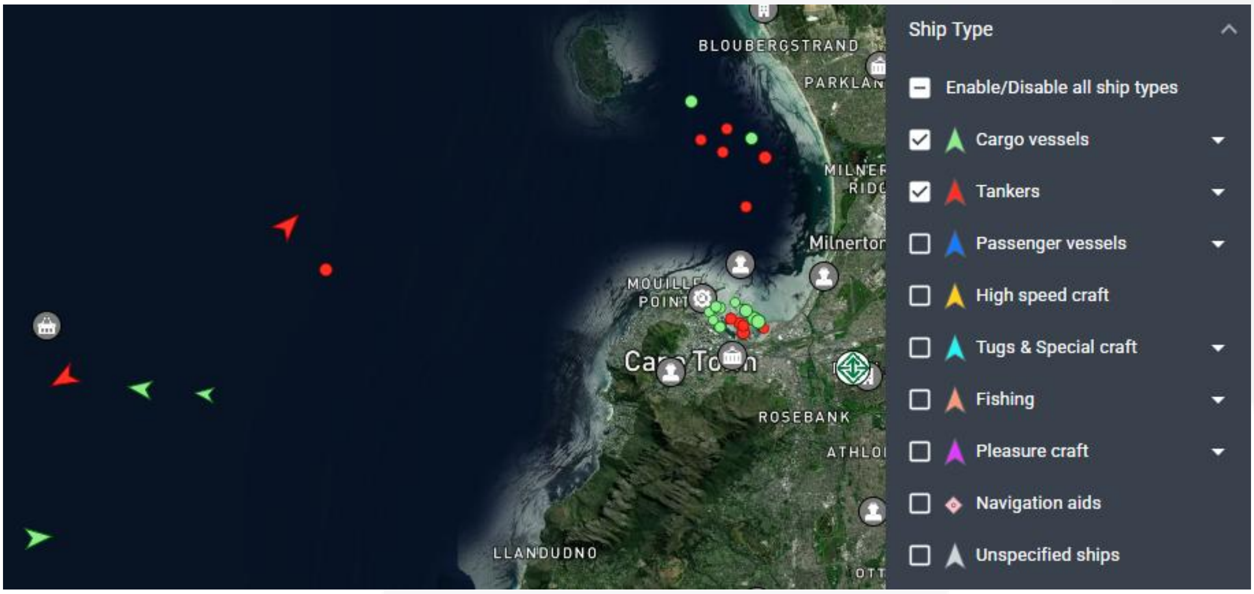
The latest reports from Maersk suggest that the following vessels will seek to maintain schedule integrity from South Africa into Europe. **(1)** The plan for the One Resilience, currently alongside in CTCT, remains to load all cargo currently in the stack and en route. The vessel will have a firm sailing deadline of 24 November at 06:00 to avoid further delays. **(2)** The Kalahari Express will follow the One Resilience in CTCT, stacks will be shared and updated accordingly via usual channels, with the expected ETD from CTCT during the afternoon of 29 November. **(3)** The Maersk Pangani will omit the Port of Cape Town and call PECT after completing operations in Durban. The scheduled ETB is currently around 25-26 November, subject to the date of departure in Durban. **(4)** Import- and transhipment laden FCL cargo destined for Cape Town from Durban will be discharged in PECT. The Santa Cruz will call PECT to load the cargo and deliver it to Cape Town after Durban. **(5)** The Maersk Pangani export stacks will be shared and updated via usual channels.

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 247 container moves on the waterside, while servicing around 306 trucks on the landside. Stack occupancy figures were recorded at 20% for the general stack, 16% 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.

The latest reports from Maersk suggest that CMA has triggered a port swap for the CMA CGM Gulf Express. The Vessel will proceed to call Cape Town Multi-Purpose Terminal instead of Cape Town Container Terminal due to the extensive weather challenges at the terminal.

Between 17 and 23 November, the FPT terminal handled eight vessels: one multi-cargo, one container, three breakbulk, and three layby vessels. Berth occupancy during this period was recorded at 77%. The terminal planned to handle seven more vessels between 24 and 30 November, with another six vessels scheduled between 1 and 7 December. The MSC Samu was delayed for around 80 hours due to strong winds, while equipment challenges and the late arrival of transporters further disrupted operations at the terminal this week.

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



Source: Marine Traffic. Updated 23/11/2025 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 4 537 gate moves and 338 rail moves on the landside. The **TTT** for the week averaged **~44 minutes** (**↑16%**, w/w), and the average **staging time** was **~33 minutes** (**↓13%**). Additionally, the terminal moved over 6 600 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 **13-16** (out of 25) **RTGs** available for the most significant part of the week. STS crane availability thus roughly sat at 50% for the week, with RTG availability roughly sitting at 58%.

Pier 2 had three vessels on berth and one at anchorage on Friday, as equipment breakdowns and adverse weather prevented optimal operational performance this week. The terminal operated with **9** to **12 gangs** and moved over **17 800** containers across the quay between Monday and Friday on the waterside. Approximately **13 615** gate moves were executed on the landside during the same period. The **average TTT** for the week was significantly increased to **~97 minutes** (**↑62%**, w/w), and the average staging time was significantly up to **~108 minutes** (**↑238%**). Approximately 2 003 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **58** and **69** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **59%** during this period.

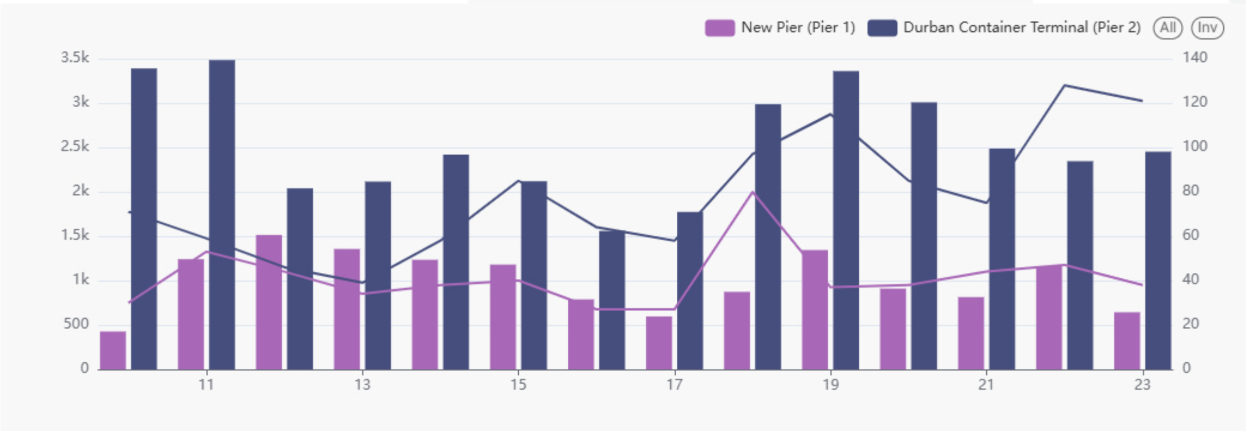
Durban's MPT terminal recorded one vessel at berth on Thursday and one at outer anchorage. Stack occupancy for containers was recorded at 24% and the breakbulk stack at 10%. In the preceding 24 hours, 452 containers and zero tons of breakbulk were handled on the waterside. On the landside, 462 container trucks were serviced at a TTT of ~21 minutes. Additionally, 11 breakbulk trucks were serviced during this period, containing approximately 201 tons. During this period, two cranes, eight reach stackers, eight forklifts, and 19 ERFs were in operation. As anticipated, the third crane (Crane 01) was out of commission for the most significant part of the week for planned maintenance. Additionally, the fourth crane is still on track to return to service towards the end of December.

Between Wednesday and Thursday, Maydon Wharf MPT recorded one berthed vessel and zero at outer anchorage. The terminal managed to move approximately 1 653 tons across the quay on the waterside during this period, while servicing around 59 trucks on the landside, containing approximately 2 079 tons.

On Thursday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with five at anchorage. In the preceding 24 hours, the terminal handled 2 374 road units and 164 units on rail on the landside, while 3 328 units were handled on the waterside. Overall stack occupancy was recorded at 98%, with 90% recorded at Q+R and 90% at G-berth. The terminal had 186 abnormal loads and managed to handle 23.

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.

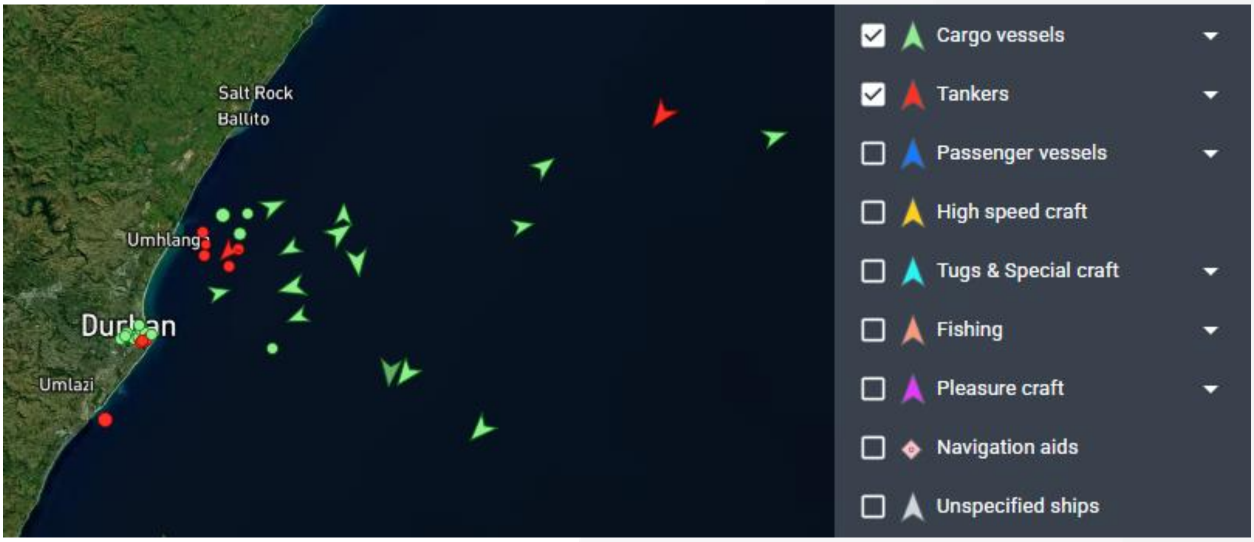
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 23/11/2025.

The queue of container vessels waiting outside Durban has remained stable this week. On Monday evening (24 November), **no** container vessels were waiting outside at anchorage for Pier 1, **two** for Pier 2, and **three** for Point. The queue of dry (**one**), liquid (**six**), and breakbulk (**one**) vessels has remained steady from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 23/11/2025 at 14:00.

iv. Richards Bay

On Friday, the Port of Richards Bay had 16 vessels at anchor and 15 on the berth, translating to four vessels at DBT, five at MPT, four at RBCT, one 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. 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 again and averaged around **179 000 tons** (**↓2%**, w/w) a day. An average of **22 trains** was serviced on the landside (**stable** from last week), and right on target (of 22 trains).

v. Eastern Cape ports

On Friday, 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. 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 12% for reefers and 15% 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 1 160 TEUs and 70 reefers on the waterside. Approximately 527 trucks were processed on the landside at a TTT of ~24 minutes. For the most significant part of the week, the terminal had between 3 and 7 STS cranes, between 21-25 RTGs, and around 21-50 hauliers in service.

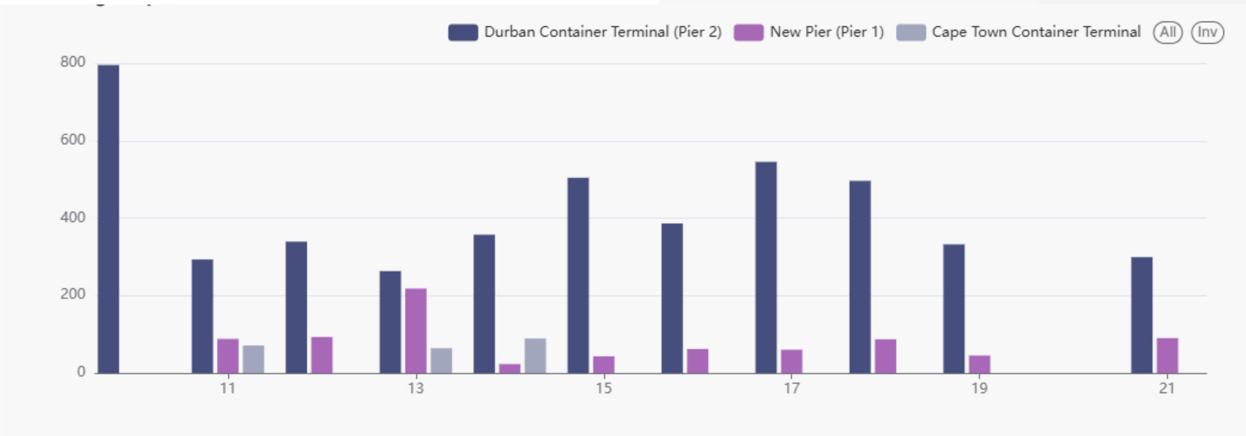
For the most significant part of the week, GCT had zero vessels at berth and none at outer anchorage. As a result, no volumes were handled on the waterside or the landside. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and eight straddles available.

On Wednesday, the Ro-Ro terminal recorded one vessel at berth and none at anchor. In the 24 hours between Tuesday and Wednesday, the terminal managed to handle 1 129 units, resulting in a stack occupancy figure of 31%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that the annual shutdown of the ConCor line commenced earlier this week and will continue until around 27 November. For the first six days of the shutdown, only one train will run on the line to transport the most urgent cargo. From next Monday, there will be a total shutdown where no trains will run on the line for the week. The Central Corridor will also be affected by the annual shutdown. Additionally, towards the end of the week, DCT Pier 2 had 198 ConCor units on hand with a dwell time of 72 hours and 455 over-border units with a dwell time of 104 days.

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



Source: Calculated using data from Transnet, 2024. Updated 23/11/2025.

In the last week (*17 to 23 November*), rail cargo on the ConCor line out of Durban was reported at **2 994** containers, down by **↓14%** from the previous week's **3 464** containers.

vii. Other updates

The latest reports from Maersk suggest that they are withdrawing the Peak Season Surcharge for the scope: China, Japan, South Korea, Hong Kong China, Taiwan China, Cambodia, Laos, Myanmar (Burma), Thailand, Vietnam, Indonesia, Malaysia, Philippines, Singapore to South Africa, Mauritius to South Africa & Mauritius for all containers, with effect from 24 November and 1 December for JP/KP Origins.

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 (*17 to 23 November*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *November 2024* averaged **~987 000 kg**.

Table 4 – International inbound and outbound cargo from OR Tambo

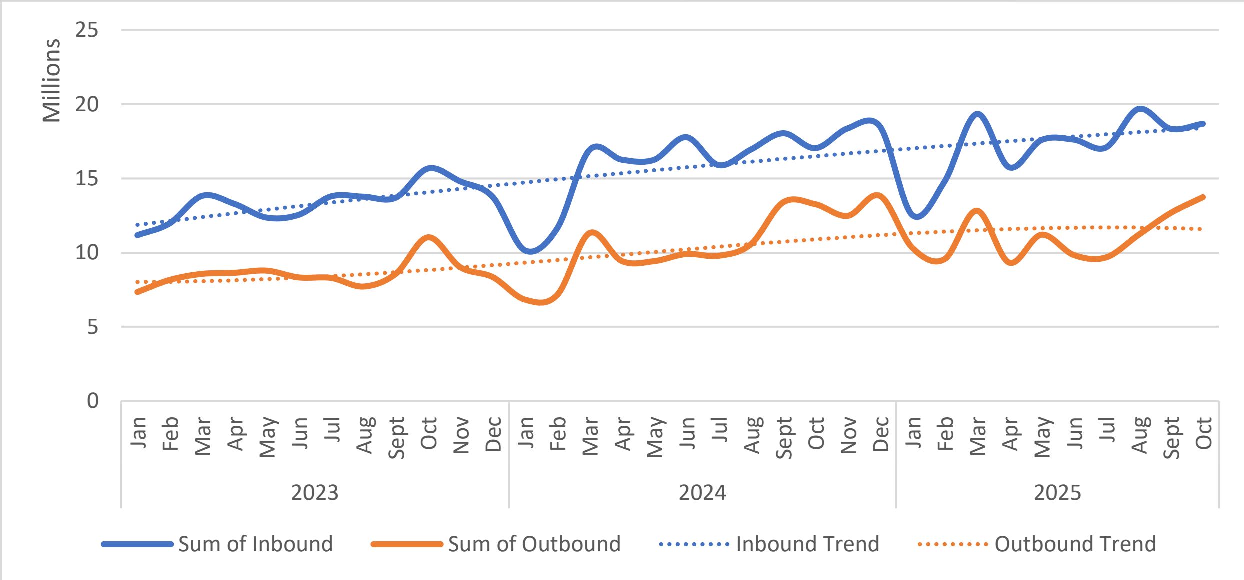
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	**710 004**	**4 970 026**	**↑1%**
Volume outbound	**413 140**	**2 891 977**	**↑4%**
Total	**1 123 143**	**7 862 003**	**↑2%**

Courtesy of ACOC. Updated: 23/11/2025.

International air cargo to and from South Africa bounced back after last week's dip. The daily average of air cargo handled amounted to **~710 000 kg** inbound (**↑1%**, w/w) and **~413 000 kg** outbound (**↑4%**). Consequently, the current levels continue to trend significantly above last year's level (**~↑14%**) and the comparative levels of pre-pandemic 2019 (**~↑13%**).

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

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



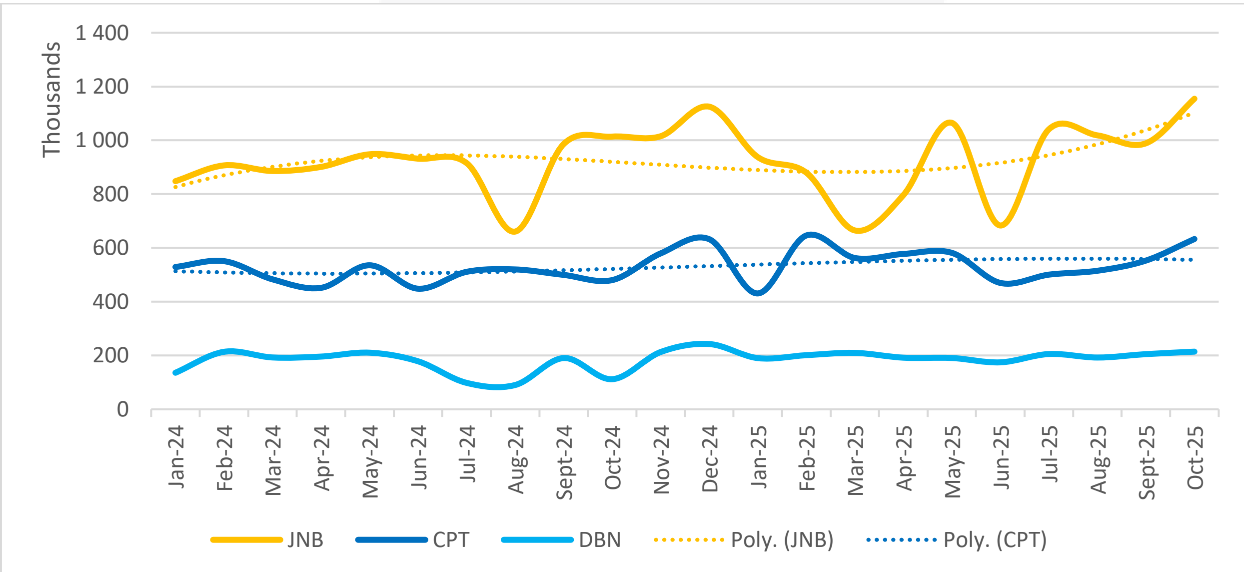
Calculated from ACOC. Updated: 23/11/2025.

Operationally

b. Domestic air cargo

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 23/11/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*17 to 23 November)*, movements along the N4 corridor decreased for road transport, while reporting for rail transport was sparse.

- On the N4 corridor, trade decreased for road transport, while reporting for rail transport was sparse.
- Truck volumes through the border post decreased to around **1 372 HGVs per day** (**↓6%**, w/w).
- Queue times increased slightly to an average of **~6,3 hours** at the border. The average processing time also increased slightly to an average of **~6,2 hours** per crossing.

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

Table 5 – Lebombo border post update

	Trucks Entering KM4	Trucks Exit KM4	Mineral Trucks	General Cargo	Micro Importers	Export (full)	Fuel Tankers	Trucks staging in KM4	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo
Average	1 372	1 349	1 006	219	27	88	37	291	1	n/a	1	n/a
% (w/w)	**-6%**	**-5%**	**-3%**	**-8%**	**-11%**	**8%**	**9%**	**3%**	**100%**	**n/a**	**25%**	**n/a**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 23/11/2025.

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

Figure 12 – Maputo vessel view (per vessel group)

Source: Marine Traffic. Updated 23/11/2025 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 **half an hour** from last week, while transit time increased by about **a quarter of an hour**.
- The median border crossing times at South African borders decreased by roughly **three-quarters of an hour**, averaging **~12,0 hrs** (**↓5%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) remained stable – averaging **~5,7 hrs** (**unchanged**).

1. **Zimbabwe – Weather-Related Disruptions**
   a. Heavy rain continues to affect key corridors, particularly the **Beitbridge–Masvingo detour**, where road conditions have deteriorated further.
   b. A truck crash was reported on the **Lundi–Ngundu detour** after a section of road was washed away; although the detour remains recommended, **drivers must declare the route at Beitbridge** to avoid additional toll charges.
   c. The **Runde Bridge** on the Masvingo route experienced an 80-minute "full closure" over the weekend. Final asphalt overlay was expected on the weekend, weather permitting.
   d. An advisory was issued on Saturday regarding an **abnormal load near Chinhoyi (northbound)**, with drivers urged to exercise caution.
2. **Zambia – System Failures and Stakeholder Tensions**
   a. **ASYCUDA system problems** in Zambia on Wednesday resulted in queues at **Kazungula**.
   b. Tensions between clearing agents and Customs escalated, leading authorities to **temporarily restrict entry into Customs offices** until the matter is resolved.
   c. Executive committees from both sides were expected to meet today to stabilise operations and restore standard processing.
3. **Zimbabwe – Law Enforcement Concerns**
   a. Reports emerged on Sunday alleging that **police officers at the Beitbridge bridge** were demanding unnecessary documentation from drivers in an apparent extortion attempt.

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

Table 6 – Delays[6] summary – South African borders[7] (both directions)

Border Post	Direction	HGV[8] 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	539	27,0	9,1	27,0	16 170	3 773
Beitbridge	Zimbabwe-SA	515	10,8	2,3	10,5	15 450	3 605
Groblersbrug	SA-Botswana	257	22,8	3,3	22,5	7 710	1 799
Martin's Drift	Botswana-SA	199	3,7	0,5	3,4	5 970	1 393
Kopfontein	SA-Botswana	232	12,7	1,5	12,4	6 960	1 624
Tlokweng	Botswana-SA	21	0,6	0,2	0,4	630	147
Vioolsdrift	SA-Namibia	30	3,9	2,1	3,5	900	210
Noordoewer	Namibia-SA	20	2,1	0,4	2,1	600	140
Nakop	SA-Namibia	30	4,0	0,5	4,0	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,3	1,1	600	140
Skilpadshek	SA-Botswana	323	14,3	2,4	14,2	9 690	2 261
Pioneer Gate	Botswana-SA	75	0,0	0,0	0,0	2 250	525
Ramatlhabama	SA-Botswana	228	6,8	0,3	6,5	2 490	581
Ramatlhabama	Botswana-SA	83	0,4	0,1	0,3	6 840	1 596
Lebombo	SA-Mozambique	1 451	6,3	1,6	6,2	43 530	10 157
Ressano Garcia	Mozambique-SA	1 389	2,1	0,3	2,1	41 670	9 723
Sum/Average		**5 412**	**7,4**	**1,6**	**7,3**	**162 360**	**37 884**

Source: TLC, FESARTA, & Crickmay, week ending 16/11/2025.

[6] 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.
[7] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[8] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

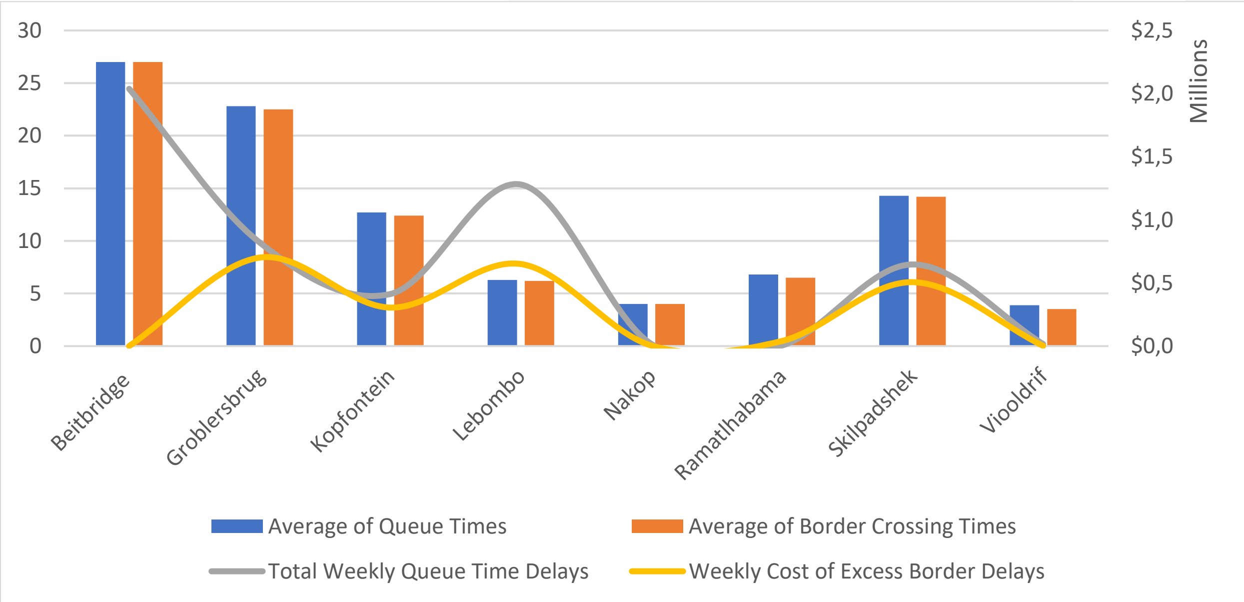
Table 7 – Delays summary – Corridor perspective

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	18,4	5,1	18,0	9 600	2 240
Central Corridor	798	1,3	0,0	1,3	23 940	5 586
Dar Es Salaam Corridor	1 819	19,0	1,9	16,0	34 380	8 022
Maputo Corridor	2 840	4,2	0,9	4,1	85 200	19 880
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 467	13,6	2,5	13,4	104 010	24 269
Northern Corridor	2 817	0,5	0,0	0,5	92 520	21 588
Trans Caprivi Corridor	992	4,9	0,7	4,7	29 760	6 944
Trans Cunene Corridor	100	2,8	0,8	2,7	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700
Trans Oranje Corridor	116	21,8	3,5	21,7	3 480	812
Sum/Average	**13 496**	**7,0**	**1,1**	**6,7**	**392 700**	**91 630**

Source: TLC, FESARTA, & Crickmay, week ending 16/11/2025.

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

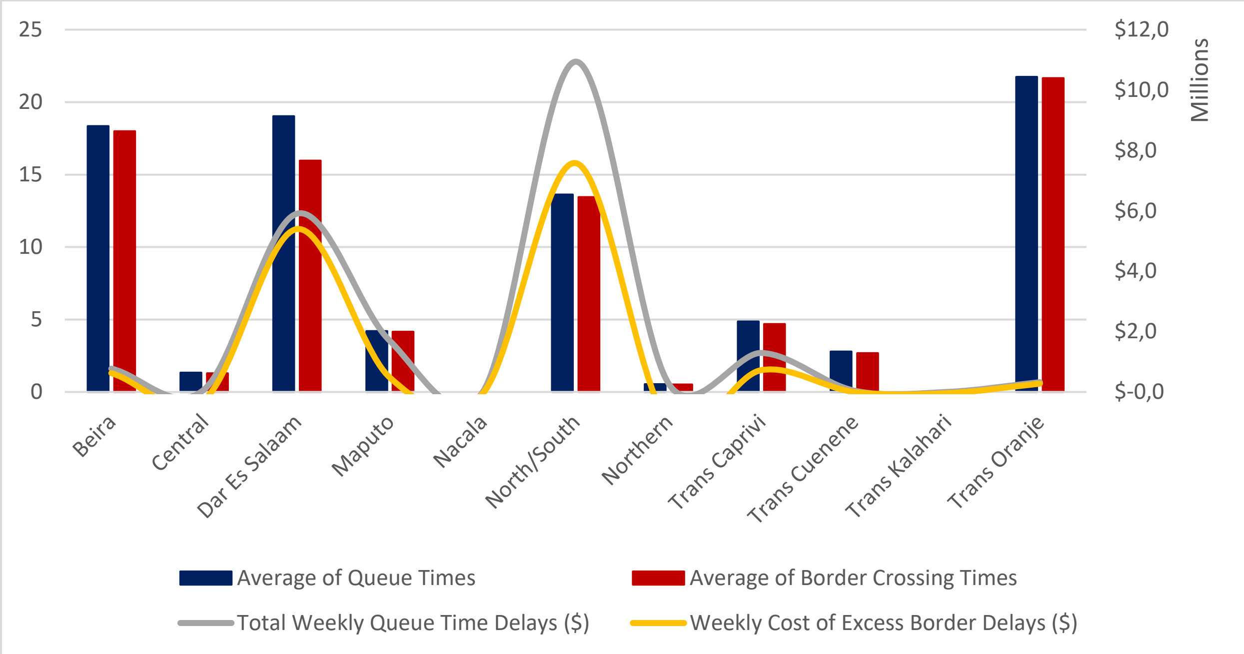
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 16/11/2025.

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

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



Source: TLC, FESARTA, & Crickmay, week ending 16/11/2025.

In summary, cross-border queue time averaged **~7,0 hours** (up by **~0,5 hours** from the previous week's **~6,5 hours**), indirectly costing the transport industry an estimated **$21,3 million** (**R367 million**). Furthermore, the week's average cross-border transit times also hovered around **~6,7 hours** (up by **~0,2 hours** from the **~6,5 hours** recorded in the previous report), at an indirect cost to the transport industry of **$13,7 million** (**R236 million**). The total indirect cost for the week amounts to an estimated **~$35 million** (**R602 million**, up by **↑19%** from the **~R507 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 schedule reliability

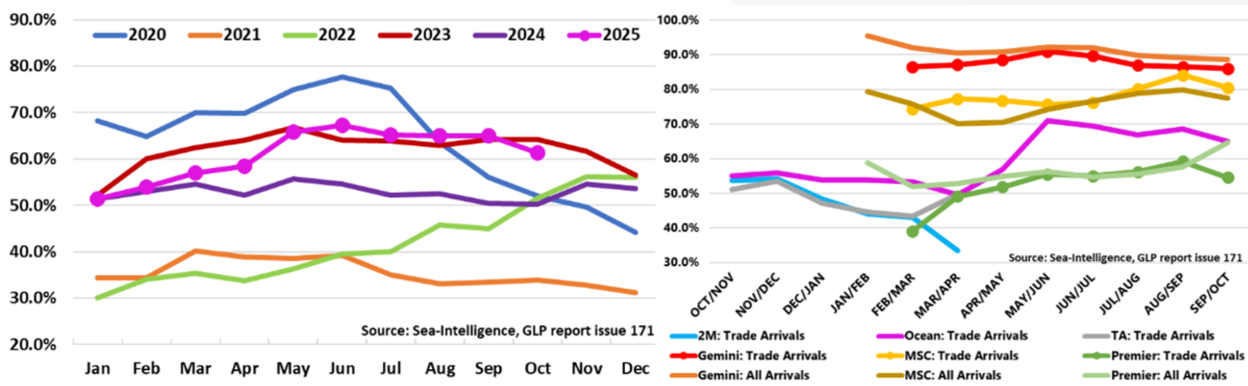
According to *Sea-Intelligence's* Global Liner Performance (GLP) report, global schedule reliability declined in October – dropping by **↓3,5%** to **65,2%**.[9] This is only the second significant month-on-month decline in 2025 and comes after three consecutive months of stable global schedule reliability. On a year-on-year level, schedule reliability was up **↑11,1%**. The average delay for late vessel arrivals increased marginally to **4,98 days**.

Among the top-13 carriers, Maersk led with a reliability of **74%**, followed by Hapag-Lloyd and MSC at **70%** and **66%**, respectively. Meanwhile, PIL recorded the lowest reliability at **45%**. On the alliance level, the

[9] Murphy, A. 26/10/2025. Global schedule reliability drops to 61,4% in October 2025.

Gemini Cooperation achieved **89%** reliability for all arrivals and **86%** for trade-arrivals; by contrast, the Premier Alliance scored **65%** (all-arrivals) and **55%** (trade-arrivals).

Figure 15 – Global Schedule Reliability (%) and Alliance Schedule Reliability (days)

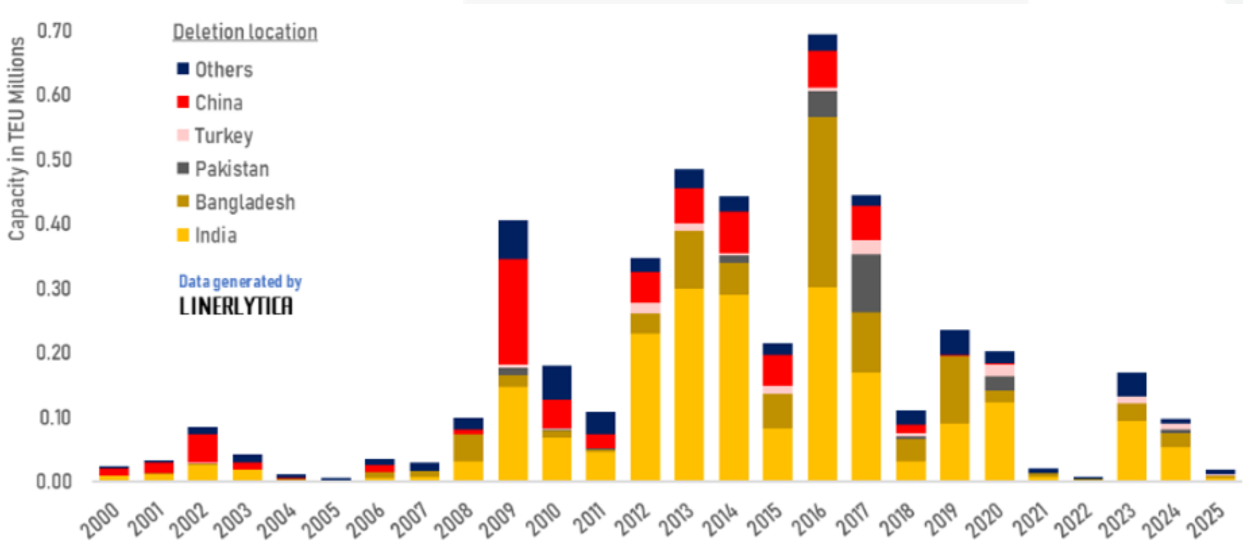


Source: Sea Intelligence

ii. Carrier capacity and container industry summary

Linerlytica reports that global container-market sentiment turned negative in week 46/7. TEU-mile demand growth fell below vessel-supply growth, pressuring freight rates (*see below*), especially on transpacific routes, as carriers hold capacity despite slack demand. At the same time, charter rates and second-hand vessel prices remained elevated, keeping scrapping at a record low: only 14 vessels (**~9 857 TEU**) demolished so far in 2025, the second-lowest annual scrapping rate in decades:

Figure 16 – Containership deletions by year (2000 to 2025)



Source: Linerlytica

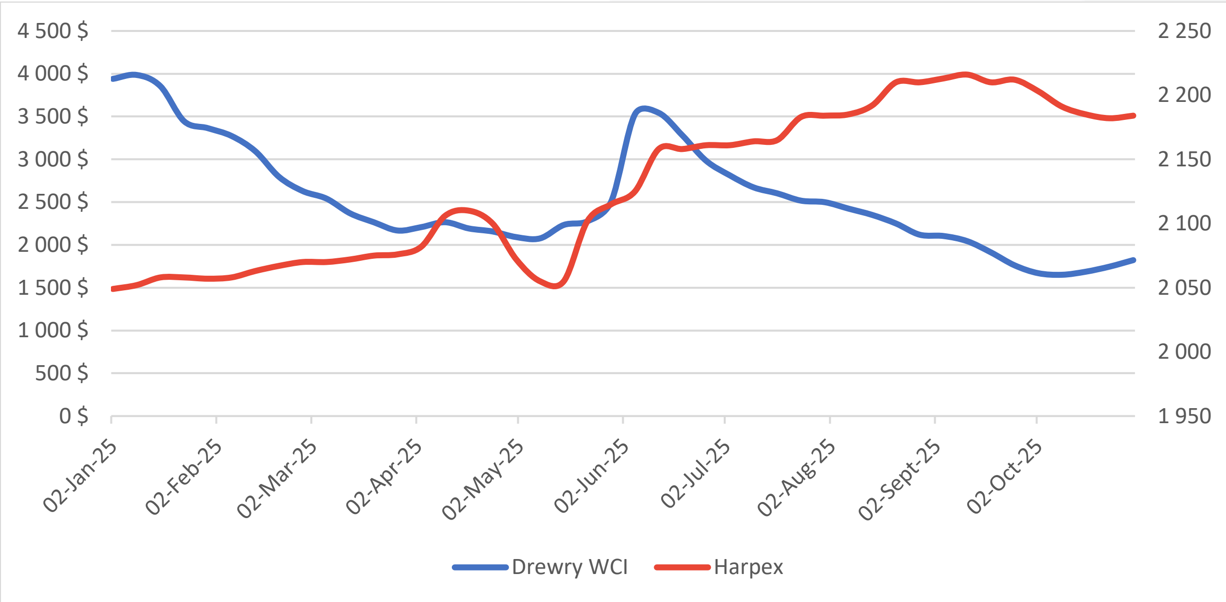
Meanwhile, the orderbook for new containerships reached an all-time high, raising over-capacity risk as delivery of **~4,4 million TEU** is scheduled for 2028 (with more orders queued). Taken together, these developments signal mounting supply-demand imbalance and pressure on liner earnings in the near to medium term.

iii. Global freight rates and carrier profits

Global freight rates were relatively stable this week, with the "*World Container Index*" (WCI) sliding marginally and is down by **↓0,4%** (or **$7**) to **$1 852 per 40-ft container**.[10] However, stability reflects diverging moves across major trade lanes: softening rates on Transpacific routes offset by strengthening rates on Asia–Europe routes. Spot rates declined for a second consecutive week. From Shanghai to New York, down by **↓10%** to roughly **$2 922/40ft**, to Los Angeles, down by **↓7%** to **$2 172/40ft**. According to Drewry's capacity data, blank sailings on this corridor are set to decrease next week, potentially adding capacity, suggesting further softening in rates unless demand picks up.[11]

Elsewhere, the charter market remains stable, with the *Harpex Index* trading unchanged at **2 184 points**.[12] The following shows the respective indices for the *year-to-date*:

Figure 17 – World Container Index (WCI) & Harpex Charter Index

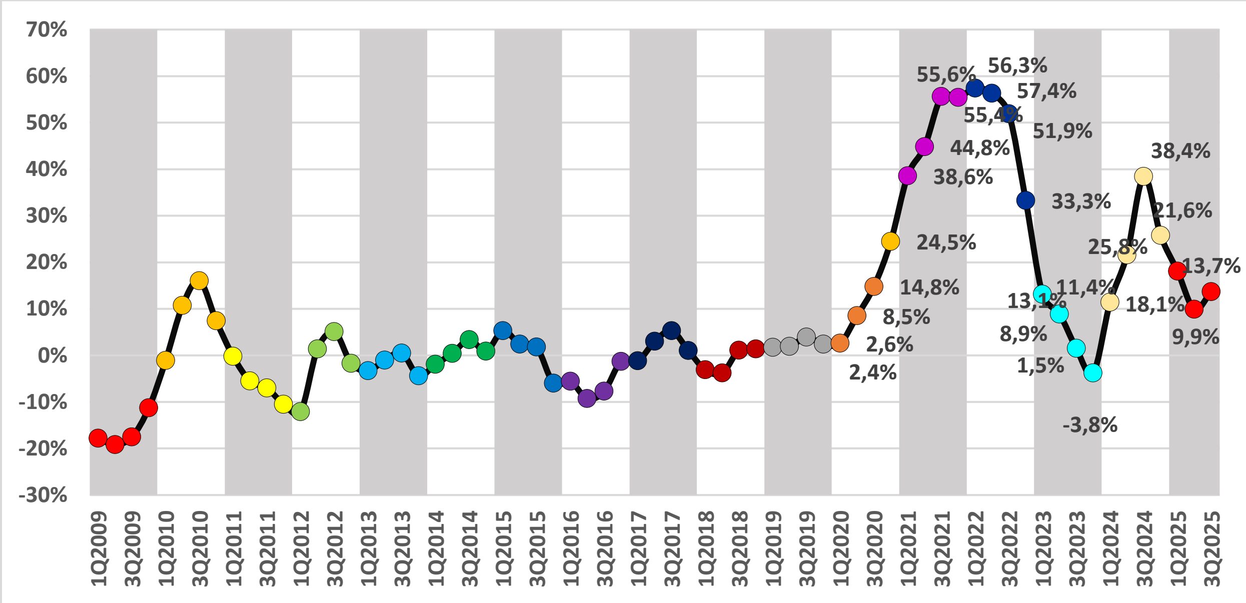


Source: Calculated from Drewry & Harpex

Concerning carrier profits, global carriers saw a rebound in profitability in Q3 2025, with average operating margins rising to **↑13,7%** as shippers front-loaded volumes ahead of tariff and port-fee deadlines. The top nine carriers earned over **$4,3 billion** in EBIT, led by Wan Hai (**26%**) and Evergreen (**23%**). Despite weaker results year-on-year, margins remain historically strong, though performance varied widely across lines, as illustrated:

[10] Drewry. 20/11/2025. World Container Index.
[11] Drewry. 21/11/2025. Cancelled Sailings Tracker.
[12] Harpex. 21/11/2025. Harper Petersen Charter Rates Index.

Figure 18 – Global Carrier Profit (q/q)

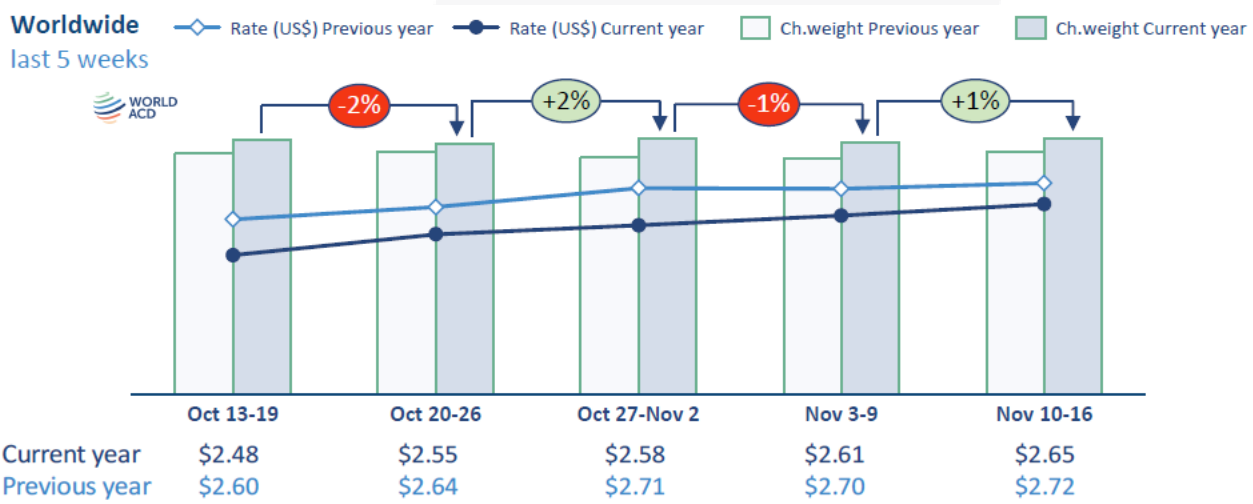


Source: Calculated from Alphaliner

b. Global air cargo industry

According to high-frequency metrics from World ACD, air cargo markets strengthened further in mid-November, with global rates and chargeable weight rising ahead of Black Friday and Thanksgiving. Asia Pacific continues to drive the upturn: spot rates increased by ↑**4%** (w/w), supported by growing tonnages (↑**1%**, w/w) and strong demand into the US, where rates reached **$5,51/kg**.

Figure 19 – Chargeable weight and rates (last five weeks, % change)



Source: World ACD

Year-on-year developments remain mixed due to last year's exceptional peak-season surge. Yet, several Southeast Asian origins recorded substantial year-on-year gains, reflecting shifting US sourcing patterns and robust semiconductor demand. Global chargeable weight rose ↑**6%** (y/y), while worldwide capacity also increased by ↑**6%**.

In other aviation news, **(1)** US cargo is facing embargoes due to a shortage of jet fuel. On 11 November, a pipeline leak was reported, leading to a fuel shortage in Washington State.[13] Elsewhere, **(2)** Brussels Airport closed all outbound flights on 26 November due to a national one-day strike in Belgium. Fortunately, the impact on cargo traffic appears limited, and the airport authority spokesperson said that only 10% of the freight flights have been cancelled.[14]

ENDS [15]

[13] Lennane, A. 25/11/2025. US jet fuel shortage sees carrier place embargo on cargo.
[14] Todd, S. 26/11/2025. Cargo gets off lightly as Brussels Airport cancels 400+ passenger flights.

[15] **ACKNOWLEDGEMENT:**

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