

# Cargo Movement Update #257<sup>1</sup>

**Date: 26 October 2025**

## Weekly Snapshot

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

Flows	Current <sup>2</sup>			Previous <sup>3</sup>			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	48 433	55 178	103 611	37 377	42 582	79 959	↑30%
Air Cargo (tons)	4 495	3 535	8 030	4 419	3 567	7 986	↑1%

## Monthly Snapshot

Figure 1 – Cyclical<sup>4</sup> monthly cargo volume, year on year (most metrics: Sep '24 vs Sep '25, % growth)

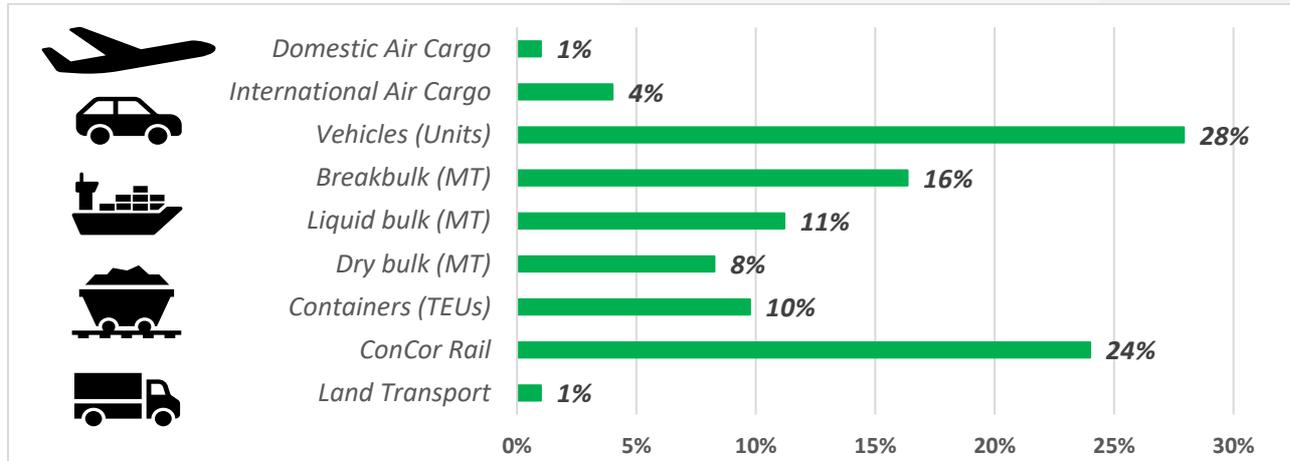
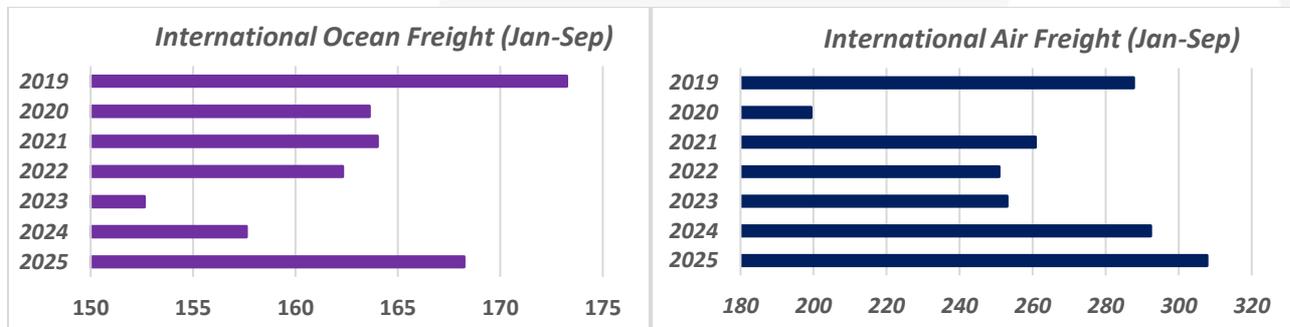


Figure 2 – Year-to-date flows 2019-2025<sup>5</sup>: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



## Key Notes

- An average of ~14 802 TEUs was handled per day, with ~11 610 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 3 839 containers, down by ↓8% from last week.
- Cross-border queue: ↓0,5 hrs; transit: ↓0,7 hrs; SA borders: ~11,0 hrs (↓3%); SADC: ~5,8 hrs (↓11%).
- Global schedule reliability reached a plateau in September, marginally improving by ↑0,1% to 65,2%.
- Global rates rose by ↑3,5% (\$59) to \$1 746, driven by GRIs; although the increase might be short-lived.
- Global air cargo tonnages rebounded by ↑6% (w/w), with overall rates up by ↑3% to \$2,48/kg.

<sup>1</sup> This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 257<sup>th</sup> update.

<sup>2</sup> 'Current' means the last seven days (a week's) of available data.

<sup>3</sup> 'Previous' means the preceding 8-14 days (a week) of available data.

<sup>4</sup> 'Monthly' means the last months' worth of available data compared to the same month in the previous year—most metrics: Sept. vs Sept.

<sup>5</sup> 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 post-pandemic record was achieved this week, as an average of **14 802 TEUs** was handled daily, an increase from **11 423 TEUs** the previous week.

Port operations were characterised by vacant berths, inclement weather, as well as equipment breakdowns and shortages. More than 30 operational hours were conceded in Cape Town this week due to adverse weather, as equipment breakdowns and inclement weather ensured operational delays in Durban. Vacant berths and adverse weather prevented optimal performance at our Eastern Cape Ports, while the Port of Richards Bay conceded around ten operational hours this week to poor weather and port meetings. The latest reports from TFR suggest that trains were running smoothly on the Central Corridor this week, and in some instances, even quicker than usual. Additionally, a derailment occurred on the line between City Deep and Mafikeng earlier this week, with the latest indications suggesting that the line will be recommissioned early next week. TFR have also indicated that the annual shutdown of the ConCor will occur towards the end of November.

Global trade policy activity has intensified, with the WTO–IMF’s new “*Global Trade Policy Activity Index*” showing a sharp rise in both liberalising and restrictive measures since 2023. The index is broadly in line with the anecdotal developments of governments’ growing interventionism amid geopolitical tensions, supply-chain realignment, and green transition pressures. In shipping, global schedule reliability stabilised at **65,2%** in September, though performance varies widely across carriers and alliances. The IMO’s decision to postpone its Net-Zero Framework revealed major divisions between developed and developing nations. Meanwhile, the containership orderbook has surged to **33% of fleet capacity** – the highest since 2009. Freight rates rose modestly, led by Shanghai outbound routes, though carriers face persistent overcapacity and weak demand. The container market remains under pressure, with rate increases likely to prove temporary as seasonal slowdowns and structural imbalances continue.

The daily average of air cargo handled amounted to **~642 000 kg** inbound (**↑2%**, w/w) and **~505 000 kg** outbound (**↓1%**) – maintaining the elevated levels dealt with last week. Consequently, the current levels continue to trend significantly above last year’s level (**~↑18%**) and the comparative levels of pre-pandemic 2019 (**~↑21%**). Air cargo operational matters this week concern **(1)** an update on the BMA operations – with around **4 800 shipments delayed** and a **13-day processing cycle**, and **(2)** G20 readiness simulation and updates.

Global air cargo markets rebounded strongly in mid-October, with worldwide tonnages up by **↑6%** week-on-week following the Asia-Pacific holiday lull. The recovery was driven primarily by a **↑14%** surge in volumes from Asia-Pacific origins. This renewed activity also lifted average worldwide airfreight rates by **↑3%** to **\$2,48 per kilogram**, restoring them to pre-holiday levels (although still about **↓4%** below the same week last year). In other aviation news, IATA has released the updated 2026 editions of its key cargo and ground-operations manuals, incorporating close to 100 significant changes to reflect evolving global standards.

Cargo movements along the N4 corridor decreased slightly for road transport and also for rail transport (although reporting has not been comprehensive). Truck volumes through the border post increased to around **1 401 HGVs per day** (**↓5%**, w/w). Queue times decreased to an average of **~5,3 hours** (**↓18%**) at the border. The average processing time decreased to an average of **~5,2 hours** (**↓17%**) per crossing. The rail to Maputo decreased to an average of **11 trains daily** (down by **one** from last week). Sugar trains from Eswatini were stable at around **one train a day**.

In the SADC region, average cross-border road transport times – on average – decreased this week. Overall, the average queue time decreased by approximately **half an hour** from last week, while transit time also decreased by slightly more – around **three quarters of an hour**. The median border crossing times at South African borders decreased by approximately **half an hour**, averaging **~11,0 hrs (↓3%)** for the week. In contrast, the greater SADC region (excluding South African-controlled) also decreased by around **three quarters of an hour**, averaging **~5,8 hrs (↓11%)**. This week, on average, the same two SADC borders took around a day to cross, namely Beitbridge and Kasumbalesa (the worst affected, taking nearly **three days** from the **Zambian side**). Other developments of note include **(1)** political disturbances in Lubumbashi causing congestion at Sakania and Kanyaka, **(2)** heavy traffic at the Norton flyover into Harare due to police roadblocks, **(3)** delays of up to 12 hours at Beitbridge, partly from fumigation on the SA side, and **(4)** confirmation of an MPOX case in Swakopmund, Namibia, with precautions advised.

The recent release of the RFI results across the **coal, chrome, magnetite, iron ore, manganese, and intermodal corridors** marks a pivotal moment in the restructuring of South Africa's rail network.<sup>6</sup> The findings reflect a unified message from domestic and international investors alike: the system's challenge lies not in potential, but in performance (even though, encouragingly, StatsSA this week reported a **↑26%**, m/m and **↑7%**, y/y increase in rail payload for August; however, these developments are from a distinctly low historical base).<sup>7</sup> Respondents have demonstrated a strong appetite to invest in rail operations, infrastructure renewal, and digital integration – provided governance is transparent, projects are ring-fenced, and measurable outcomes are secured. Encouragingly, the Department of Transport's PSP Unit has brought structure, credibility, and data-driven insight to this reform process, laying the groundwork for corridor-specific Private Sector Participation models. The path ahead requires disciplined execution: **(1)** addressing inefficiencies, **(2)** ensuring interoperability across corridors, and **(3)** aligning investment frameworks with transformation objectives. With the problem statements now clearly framed, South Africa is closer than ever to unlocking a modern, efficient, and competitive rail freight system – the next steps will determine whether reform becomes reality.

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<sup>6</sup> DoT. 26/10/2025. [Results from PSP RFI – Freight Rail](#).

<sup>7</sup> StatsSA. 21/10/2025. [Land Transport Survey – August 2025](#).

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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 20 to 26 October (measured in TEUs)

7-day flow reported (20/10/2025 – 26/10/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 917	41 417	↑18%
New Pier (Pier 1)	2 429	17 005	↓6%
Cape Town Container Terminal	2 845	19 916	↑67%
Ngqura Container Terminal	2 793	19 549	↑110%
Port Elizabeth Container Terminal	71	496	↑132%
Other	747	5 228	↑1%
<b>Total</b>	<b>14 802</b>	<b>103 611</b>	<b>↑30%</b>

Source: Calculated from TPT, 2025. Updated 26/10/2025.

A substantially increased average of ~**14 802 TEUs** (↑**30%**) was handled per day for the last week (20 to 26 October, Table 2). Throughput was consequently significantly above the projected average of ~**12 279 TEUs** (↑**21%** actual versus projected).

For the coming week, a decreased average of ~**11 610 TEUs** (↓**22%**) is predicted to be handled (27 October to 2 November, Table 3).

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

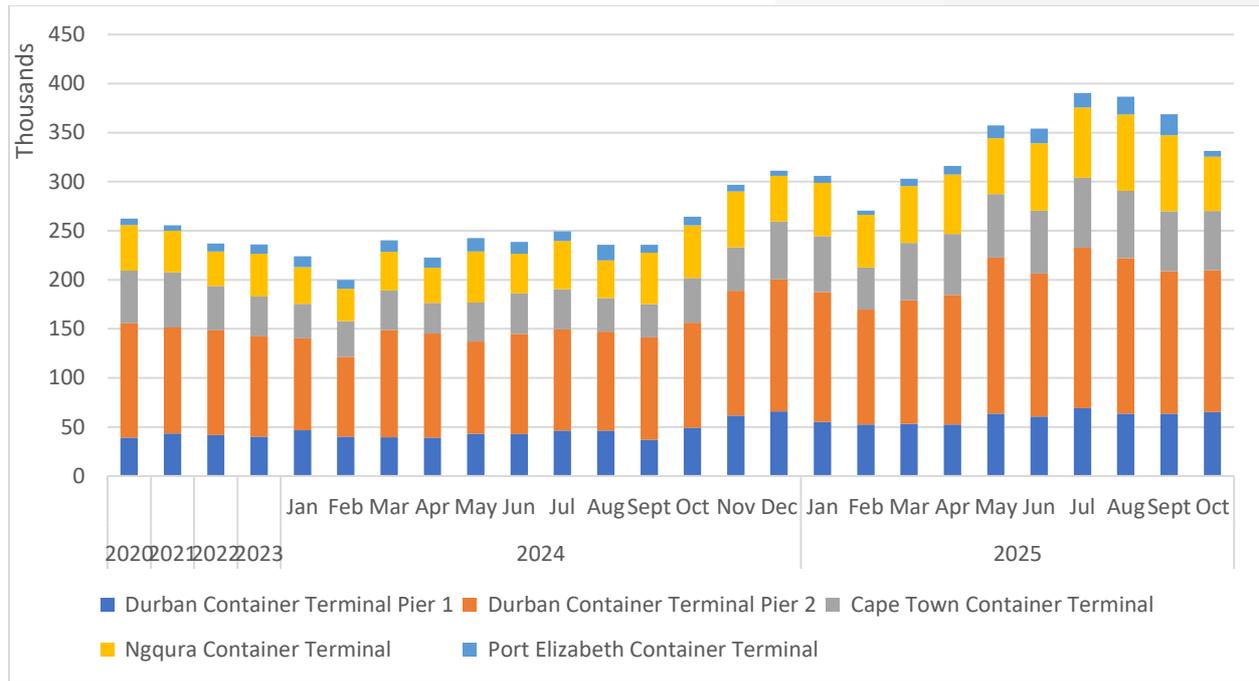
Table 3 – Container Ports – Weekly flow projected for 27 October to 2 November (measured in TEUs)

7-day flow projected (27/10/2025 – 02/11/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 421	30 947	↓25%
New Pier (Pier 1)	1 695	11 863	↓30%
Cape Town Container Terminal	2 123	14 859	↓25%
Ngqura Container Terminal	2 159	15 110	↓23%
Port Elizabeth Container Terminal	381	2 665	↑437%
Other	832	5 825	↑11%
<b>Total</b>	<b>11 610</b>	<b>81 269</b>	<b>↓22%</b>

Source: Calculated from TPT, 2025. Updated 26/10/2025.

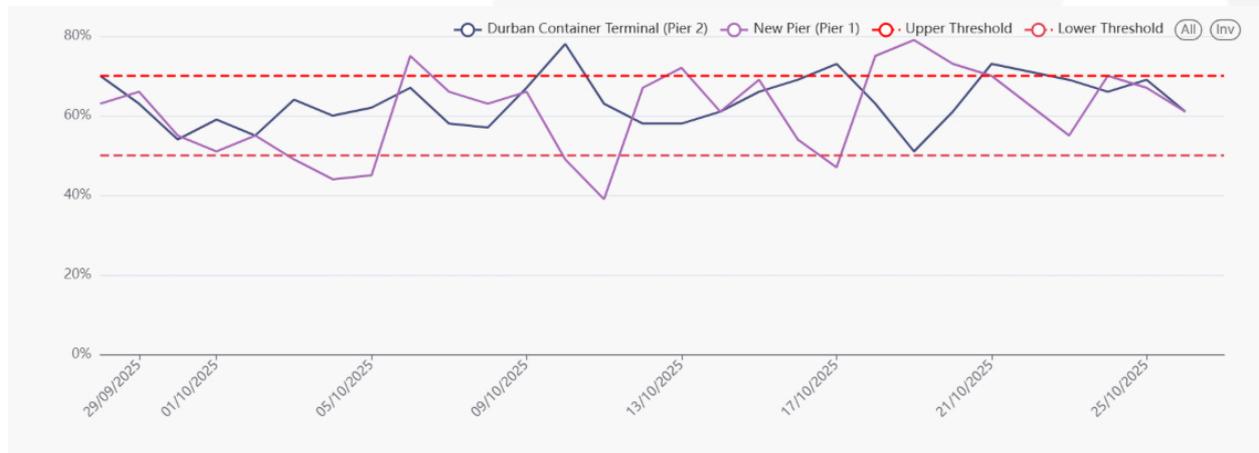
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2025, and updated 26/10/2025.

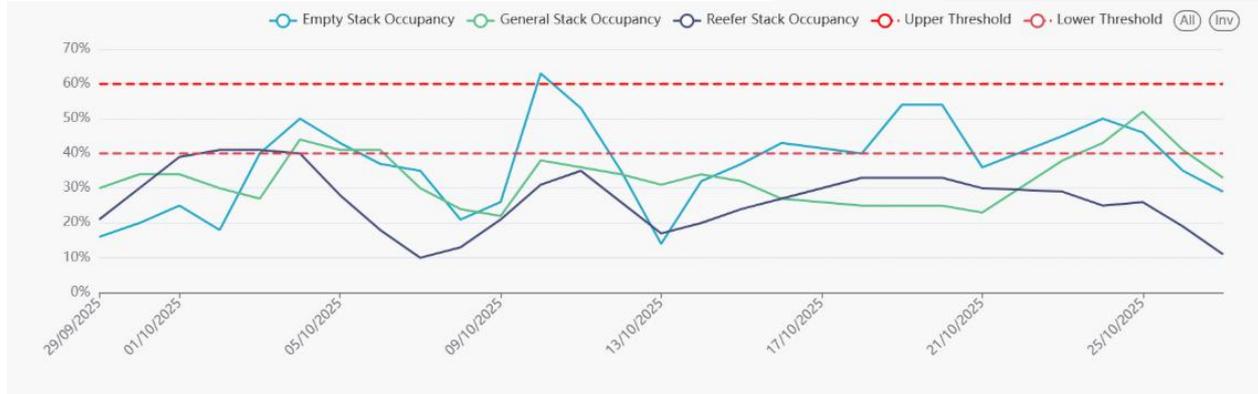
Figure 4 – Stack occupancy in DCT, general-purpose containers (21 September to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 26/10/2025.

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 (21 September to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 26/10/2025.

**b. Summary of port operations**

**i. Weather and other delays**

- More than 30 operational hours were conceded in Cape Town this week due to adverse weather.
- Equipment breakdowns and inclement weather ensured operational delays in Durban.
- Vacant berths and adverse weather prevented optimal performance at our Eastern Cape Ports.
- The Port of Richards Bay conceded around ten operational hours this week to poor weather and port meetings.

**ii. Cape Town**

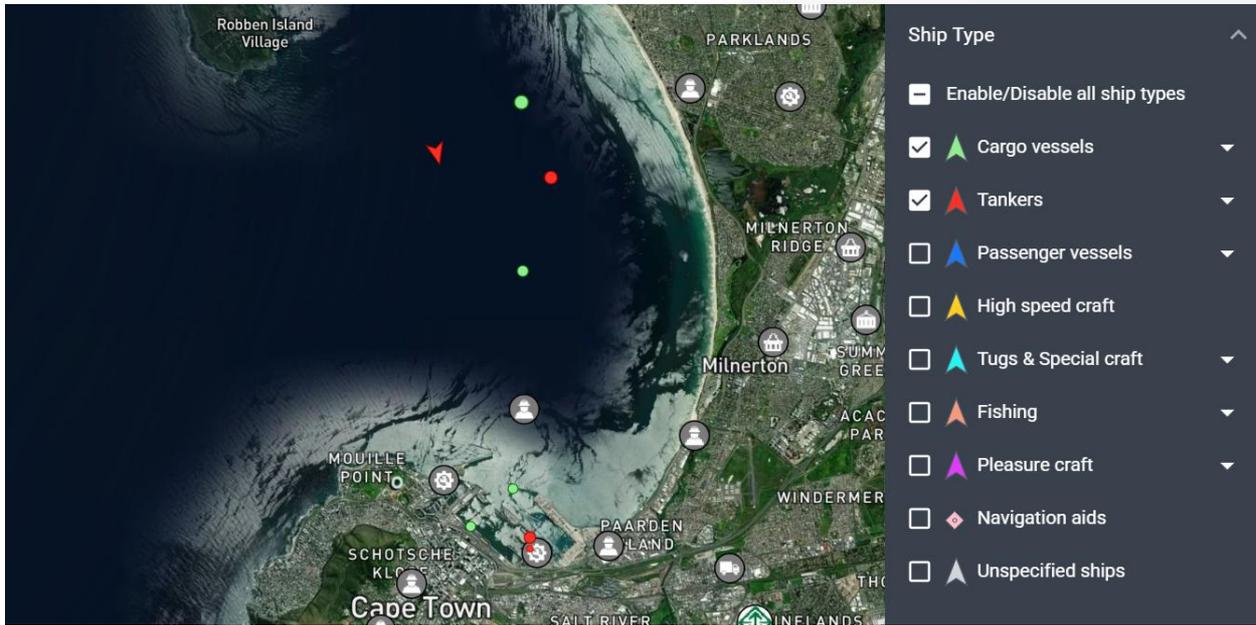
On Friday, CTCT recorded three vessels at berth and none at anchor, as strong winds, dense fog, and union engagements proved to be the primary operational constraints at the port. To contextualise this, the terminal conceded over 30 operational hours to adverse weather before Wednesday. On the landside, between Monday and Friday, the terminal managed to service at least 4 291 trucks while handling approximately 500 rail units. On the waterside, the terminal executed approximately 3 086 container moves across the quay during the same period. Additionally, this week, the terminal operated with **eight STS cranes, 20-26 RTGs**, and approximately **58-59 hauliers**. Towards the end of the week, Crane LC1 went out of commission in an attempt to improve its reliability and is expected back in operation early next week.

On Friday, CTMPT had zero vessels at berth, with zero vessels waiting at outer anchorage. For the most significant part of the week, no waterside or landside volumes were handled at the terminal due to no vessels being on berth. As a result, stack occupancy figures were also recorded at 0% for the general-, reefer-, and empty stacks. The latest reports from TNPA suggest that the next vessel is scheduled for arrival around 2 November.

Between 13 and 19 October, the FPT terminal handled seven vessels: two multi-cargo, one breakbulk, two container vessels, one dry bulk, and one layby vessel. Berth occupancy during this period was recorded at 44%. The terminal planned to handle four more vessels between 20 and 26 October, with another four vessels scheduled between 27 October and 3 November. The late arrival of transporters resulted in operational delays during this period. Elsewhere, global logistics giant Maersk is investing R1,72 billion in a

new cold-storage hub in Cape Town to close key export-chain gaps and boost South Africa's perishable-goods competitiveness.<sup>8</sup>

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



Source: Marine Traffic. Updated 26/10/2025 at 14:00.

### iii. Durban

On Friday, Pier 1 recorded two vessels on berth, with zero vessels at anchor. Between Monday and Friday, the terminal executed at least 5 737 gate moves and 428 rail moves on the landside. The **average TTT** for the week was **~87 minutes (↑24%, w/w)**, as the **staging time** increased slightly, averaging **~57 minutes (↓5%)**. Additionally, the terminal moved over 8 100 TEUs across the quay on the waterside during the same period. The terminal had between **five and six** (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 79% 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 **8 to 12 gangs** and moved over **17 700** containers across the quay between Monday and Friday on the waterside. Approximately **13 053** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~100 minutes (↑20%, w/w)** and an average **staging time** of **~121 minutes (↑53%)**. Approximately 2 822 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **65** and **71** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **63%** 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 40% and the breakbulk stack at 35%. In the preceding 24 hours, 456 containers and zero tons of breakbulk were handled on the waterside. On the landside, 505 container

<sup>8</sup> Peyper, L. 29/10/2025. [Maersk set to boost Cape exports with R1.7bn cold storage hub.](#)

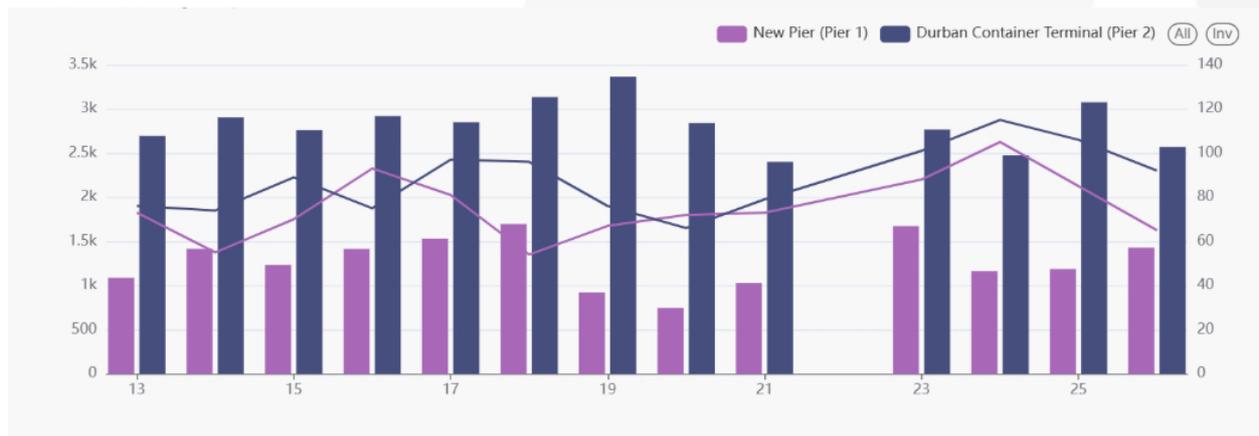
trucks were serviced at a TTT of ~70 minutes. Additionally, 63 breakbulk trucks were serviced, containing approximately 1 733 tons. During this period, three cranes, ten reach stackers, six forklifts, and 23 ERFs were in operation. The third crane returned to service between Tuesday and Wednesday after going out of commission towards the end of last week. The equipment challenges, unfortunately, did not end there, as the terminal operated with only one crane on Tuesday. Additionally, the fourth crane is still on track to return to service around 22 December.

Between Thursday and Friday, the Maydon Wharf MPT terminal had zero vessels at berth or at anchor. During this period, the terminal managed to complete the last active vessel by handling the remaining 1 004 tons across the quay on the waterside. On the landside, the terminal managed to service around 48 trucks, containing approximately 1 739 tons. During the same period, the agri-bulk facility managed to handle around 8 894 tons on the waterside, with no trucks being handled on the landside.

On Friday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with two at anchorage. In the preceding 24 hours, the terminal handled 842 road units and 239 units on rail on the landside, while 1 812 units were handled on the waterside. Overall stack occupancy was recorded at 79%, with 70% recorded at Q+R and 70% at G-berth. The terminal had 135 abnormal loads and managed to handle 35.

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.

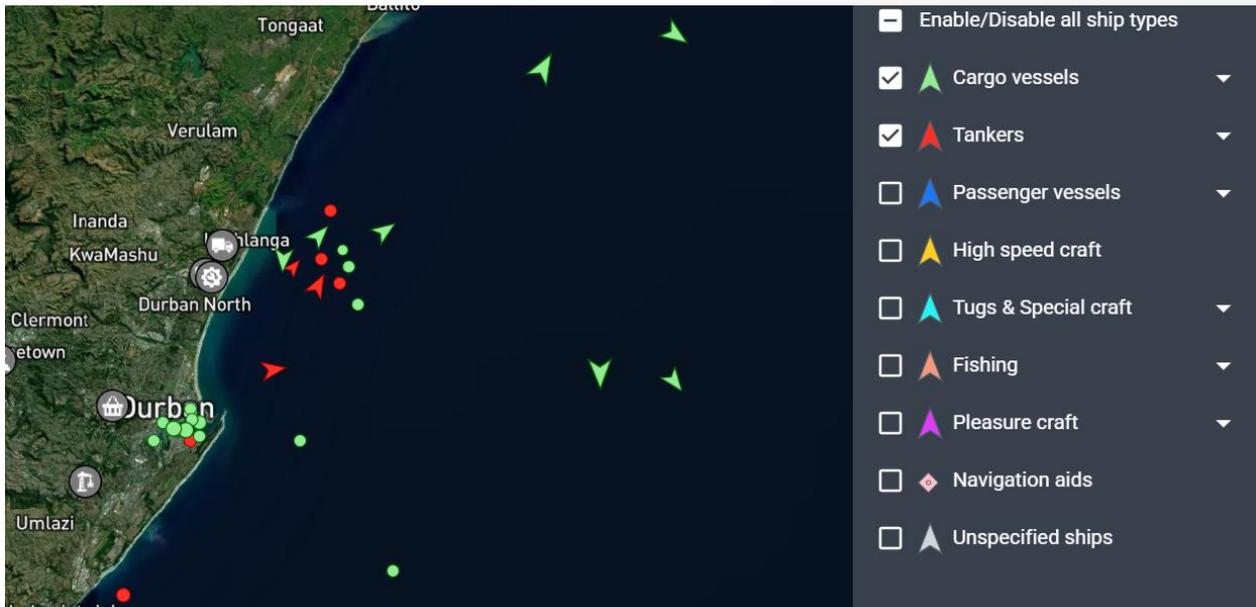
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 26/10/2025.

The queue of container vessels waiting outside Durban has remained stable this week, as high throughput clears some of the increased traffic outside of the port. On Monday evening (27 October), **one** container vessel was waiting outside at anchorage for Pier 1, **two** for Pier 2, and **one** for Point. The queue of dry (**four**), liquid (**three**), and breakbulk (**three**) vessels has decreased slightly from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 26/10/2025 at 14:00.

**iv. Richards Bay**

On Thursday, the Port of Richards Bay had six vessels at anchor and 17 on the berth, translating to five vessels at DBT, six at MPT, four at RBCT, and two at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter were deployed to support marine resources towards the end of the week.

The daily average coal throughput for the week decreased slightly and averaged around **153 000 tons** (↓4%, w/w) a day. An average of **25 trains** was serviced on the landside (up by **two** from last week), and slightly above the target of 22.

**v. Eastern Cape ports**

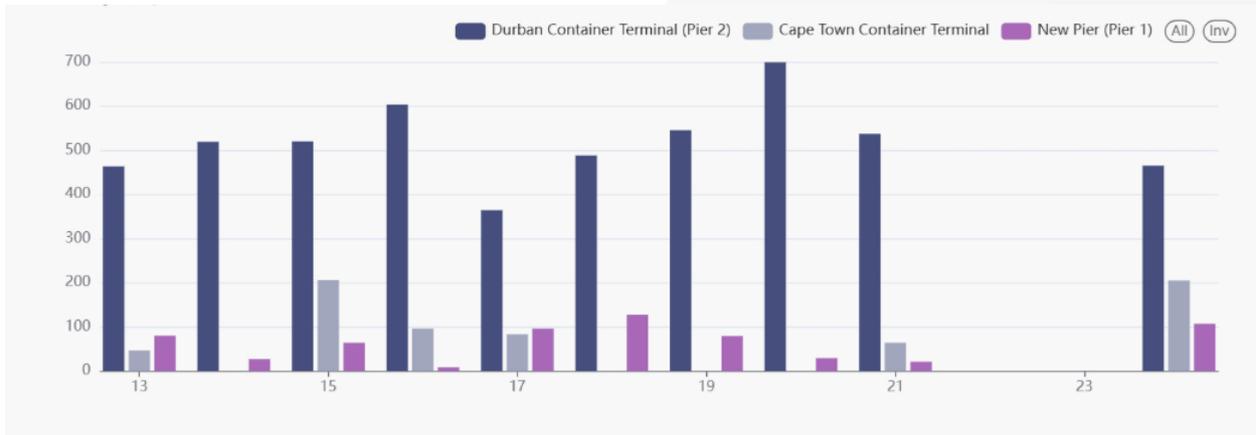
On Friday, NCT recorded three vessels on berth and none at anchor, with three vessels drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. For the majority of the week, the Ports of PE and Coega shared a pilot boat due to some challenges with their waterside equipment. Stack occupancy figures were recorded at 16% for reefers and 26% 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, despite experiencing adverse weather for around ten hours during this period, the terminal handled approximately 1 982 TEUs and 113 reefers on the waterside. Approximately 457 trucks were processed on the landside at a TTT of ~30 minutes. For the most significant part of the week, the terminal had between 5 and 7 STS cranes, between 23-24 RTGs, and around 43 to 55 hauliers in service.

On Friday, 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, seven trucks were processed at a TTT of ~16 minutes on the landside, while 253 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 2% for the general stack and 1% for reefers. Towards the end of the week, the terminal had one STS crane, one mobile harbour crane, and ten straddles in service. Additionally, some equipment challenges and adverse weather further hindered optimal operational performance this week.

**vi. Transnet Freight Rail (TFR)**

The latest reports from TFR suggest that trains were running smoothly on the Central Corridor this week, and in some instances, even quicker than usual. Additionally, a derailment occurred on the line between City Deep and Mafikeng earlier this week, with the latest indications suggesting that the line will be recommissioned early next week. TFR have also indicated that the annual shutdown of the ConCor will occur towards the end of November. Towards the end of the week, DCT Pier 2 had 239 ConCor units on hand with a dwell time of 72 hours and 345 over-border units with a dwell time of 75 days.

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



Source: Calculated using data from Transnet, 2024. Updated 26/10/2025.

In the last week (20 to 26 October), rail cargo on the ConCor line out of Durban was reported at **3 839** containers, down by **↓8%** from the previous week’s **3 983** containers.

**vii. General**

TNPA has commenced the **R147 million** “Latimer’s Landing” quay revitalisation project at the Port of East London, aimed at transforming the waterfront into a mixed-use tourism and business precinct as part of its real-estate optimisation strategy.<sup>9</sup> The project is expected to support local economic growth through infrastructure investment, job creation (with 44 jobs already created and a further 55 during construction), and SMME participation, and is scheduled for completion in April 2027.

Additionally, the latest Southern Africa terminal and service update from Maersk for week 44 provides excellent reading for our major South African Ports, as all major terminals (CTCT, CTMPT, NCT, PECT, Pier 1 and Pier 2) recorded waiting times below one day. The picture looks slightly dimmer for our immediate neighbouring counterparts, with Port Louis (Mauritius) recording 0-7 days’ waiting time and Beira (Mozambique) recording 11 days’ waiting time.

<sup>9</sup> Freight News. 22/10/2025. [Transnet breaks ground on Latimer’s Landing project.](#)

## 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 (20 to 26 October). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in October 2024 averaged ~974 000 kg.

Table 4 – International inbound and outbound cargo from OR Tambo

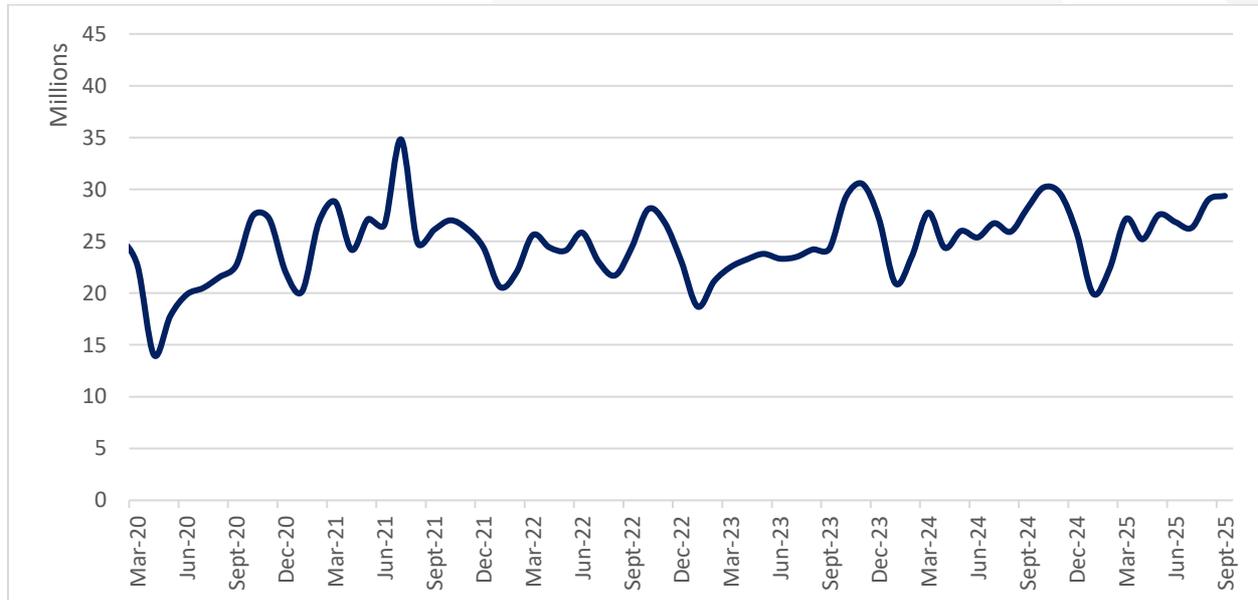
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	642 120	4 494 842	↑2%
Volume outbound	505 029	3 535 205	↓1%
Total	1 147 150	8 030 047	↑1%

Courtesy of ACOC. Updated: 26/10/2025.

International air cargo lifted to and from ORTIA amounted to ~642 000 kg inbound (↑2%, w/w) and ~505 000 kg outbound (↓1%) – maintaining the elevated levels handled last week. Consequently, the current levels continue to trend significantly above last year’s level (~↑18%) and the comparative levels of pre-pandemic 2019 (~↑21%).

The following figure shows the international air cargo flows to and from OR Tambo since the start of the pandemic, with the YTD average up by ↑20% since then:

Figure 10 – International cargo for all international terminals – volumes per month (kg millions)

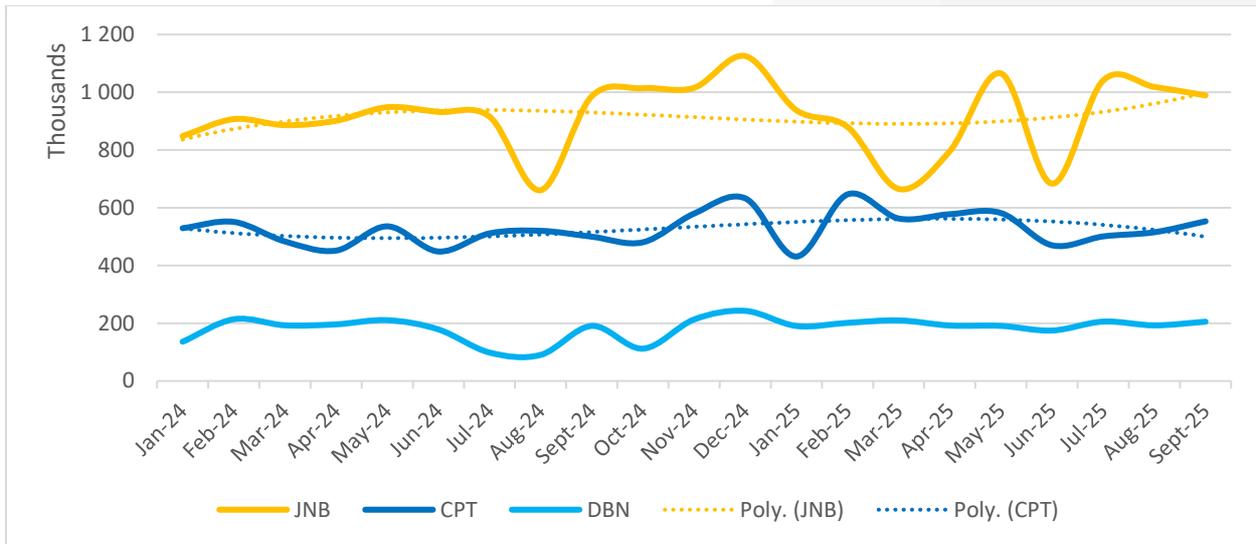


Calculated from ACOC. Updated: 26/10/2025.

### 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: 26/10/2025.

### c. Air cargo operations

Cargo operations feedback this week concerns the ongoing BMA matters, as well as an update on the G20 readiness:

#### 1. Border Management Authority (BMA) updates:

- a. **Severe operational backlogs** persist at BMA Health (OR Tambo), with around **4 800 shipments delayed** and a **13-day processing cycle**. Limited Treasury funding and structural inefficiencies continue to undermine service delivery, predictability, and compliance.
- b. SAAFF and industry stakeholders are engaging the BMA on a **backlog recovery plan** with measurable standards and shared governance. Four interventions are being explored – weekend processing support, deployment of community service students, industry secondments, and a TETA internship programme – aiming for a two-day turnaround.
- c. The digitalisation of “Code 4” and related feedback processes remains a key reform priority, alongside calls for an independent audit and improved digital oversight at State Vet Durban.
- d. Broader emphasis remains on transparency, accountability, and risk-based controls aligned with WTO-TFA and WCO models – ensuring reforms are executable, not only conceptual.

#### 2. OR Tambo International Airport (ORTIA) – G20 Readiness:

- a. **G20 operational readiness** is advancing under a multi-agency aviation forum led by ACSA and NATJOINTS, with OR Tambo as the **primary entry point for Heads of State**.
- b. Successful **dry-run simulations (22–24 October)** tested passenger, baggage, and aircraft processes to achieve a **15-minute throughput standard** for VIP facilitation.
- c. The **Enhanced Traveller Authorisation (ETA) System** is being piloted for select delegations (China, India, Indonesia, Mexico), though system integration and permit backlogs remain risks.
- d. **Infrastructure, fuel, and power redundancies** are in place, with all maintenance work suspended from 1 November to safeguard uninterrupted operations during the Summit.

### 3. Road and Regional Update

#### a. Lebombo border post update

In the last week (20 to 26 October), movements along the N4 corridor decreased slightly for road transport and also for rail transport (although reporting has not been comprehensive).

- Truck volumes through the border post increased to around **1 401 HGVs per day** (↓5%, w/w).
- Queue times decreased to an average of **~5,3 hours** (↓18%) at the border.
- The average processing time decreased to an average of **~5,2 hours** (↓17%) per crossing.
- The rail to Maputo decreased to an average of **11 trains daily** (down by **one** from last week).
- Sugar trains from Eswatini were stable at around **one train a day**.

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
<b>Design Capacity</b>	<b>1 500</b>	<b>1 500</b>	<b>1 200</b>	<b>200</b>	<b>n/a</b>	<b>50</b>	<b>50</b>	<b>2 000</b>	<b>20</b>	<b>10</b>	<b>6</b>	<b>4</b>
Average	1 401	1 365	1 034	223	28	84	38	260	11	9	1	1
% (w/w)	-5%	7%	-3%	-5%	1%	-10%	-8%	-4%	-14%	-33%	-25%	25%
% 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 26/10/2025.

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 26/10/2025 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 **half an hour** from last week, while transit time also decreased by slightly more – around **three quarters of an hour**.

- The median border crossing times at South African borders decreased by approximately **half an hour**, averaging **~11,0 hrs (↓3%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) also decreased by around **three quarters of an hour**, averaging **~5,8 hrs (↓11%)**.
  1. **DRC (Sakania/Kanyaka):**
    - a. Political disturbances in Lubumbashi led to **heavy congestion** at Sakania and Kanyaka.
    - b. There was **no unrest**, but **long queues** formed as the **road near Kanyaka was blocked**, causing drivers to **avoid entering the DRC**.
  2. **Zimbabwe (Harare/Norton Flyover):**
    - a. Severe **congestion was reported last Friday** due to **roadblocks by authorities** at the Norton flyover into Harare; transporters were advised to exercise **patience**.
  3. **South Africa–Zimbabwe (Beitbridge):**
    - a. A loaded vehicle joined the **southbound queue at 13:00**, was **released into SA at 01:00** the following morning — roughly **12 hours total delay**.
    - b. Processing time was around **30 minutes per truck**.
    - c. Additional **2–3-hour hold** on Sunday due to **fumigation operations** on the SA side.
  4. **Namibia:**
    - a. The government confirmed a **case of MPOX (monkeypox)** in **Swakopmund**; **precautionary measures** have been issued.

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

Table 6 – Delays<sup>10</sup> summary – South African borders<sup>11</sup> (both directions)

Border Post	Direction	HGV <sup>12</sup> 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	536	25,6	8,4	26,0	16 080	3 752
Beitbridge	Zimbabwe-SA	528	13,6	3,2	13,4	15 840	3 696
Groblersbrug	SA-Botswana	259	22,5	2,4	22,3	7 770	1 813
Martin’s Drift	Botswana-SA	189	2,0	0,3	1,6	5 670	1 323
Kopfontein	SA-Botswana	241	13,4	2,0	12,2	7 230	1 687
Tlokweng	Botswana-SA	25	0,6	0,2	0,3	750	175
Vioolsdrift	SA-Namibia	30	3,5	0,1	3,6	900	210
Noordoewer	Namibia-SA	20	1,8	0,5	1,5	600	140
Nakop	SA-Namibia	30	3,5	0,4	3,3	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,4	1,1	600	140
Skilpadshek	SA-Botswana	316	11,5	2,4	11,3	9 480	2 212
Pioneer Gate	Botswana-SA	67	1,3	0,6	1,5	2 010	469
Ramatlhabama	SA-Botswana	213	4,1	0,4	4,1	1 680	392
Ramatlhabama	Botswana-SA	56	0,5	0,1	0,3	6 390	1 491
Lebombo	SA-Mozambique	1 467	5,3	1,6	5,2	44 010	10 269
Ressano Garcia	Mozambique-SA	1 416	1,8	0,3	2,1	42 480	9 912
<b>Sum/Average</b>		<b>5 413</b>	<b>7,0</b>	<b>1,4</b>	<b>6,9</b>	<b>162 390</b>	<b>37 891</b>

Source: TLC, FESARTA, & Crickmay, week ending 19/10/2025.

<sup>10</sup> 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.

<sup>11</sup> Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.

<sup>12</sup> Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

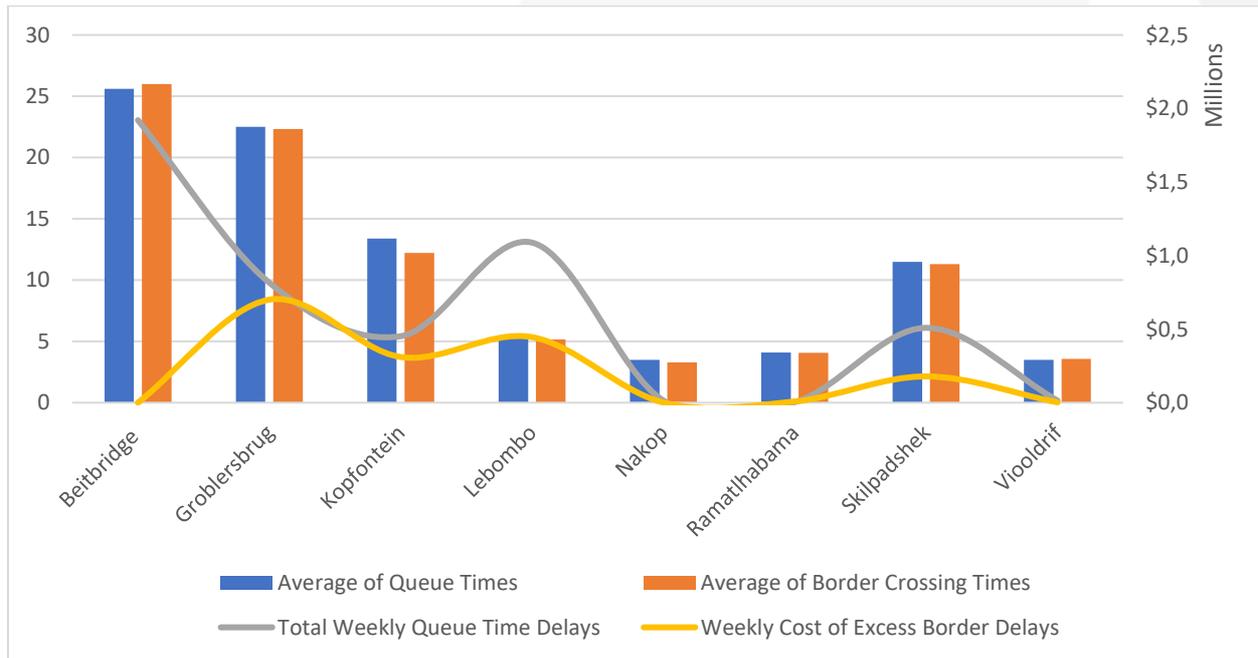
Table 7 – Delays summary – Corridor perspective

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	13,4	4,2	13,2	9 600	2 240
Central Corridor	798	0,9	0,0	0,4	23 940	5 586
Dar Es Salaam Corridor	1 819	13,5	1,3	13,4	54 570	12 733
Maputo Corridor	2 883	3,6	0,9	3,6	86 490	20 181
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 469	14,1	2,3	14,0	104 070	24 283
Northern Corridor	2 817	1,7	0,6	2,0	92 520	21 588
Trans Caprivi Corridor	948	4,5	0,8	4,2	28 440	6 636
Trans Cunene Corridor	100	2,5	0,3	2,4	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700
Trans Oranje Corridor	116	17,2	0,9	16,9	3 480	812
<b>Sum/Average</b>	<b>13 497</b>	<b>6,5</b>	<b>1,1</b>	<b>6,4</b>	<b>412 920</b>	<b>96 348</b>

Source: TLC, FESARTA, & Crickmay, week ending 19/10/2025.

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

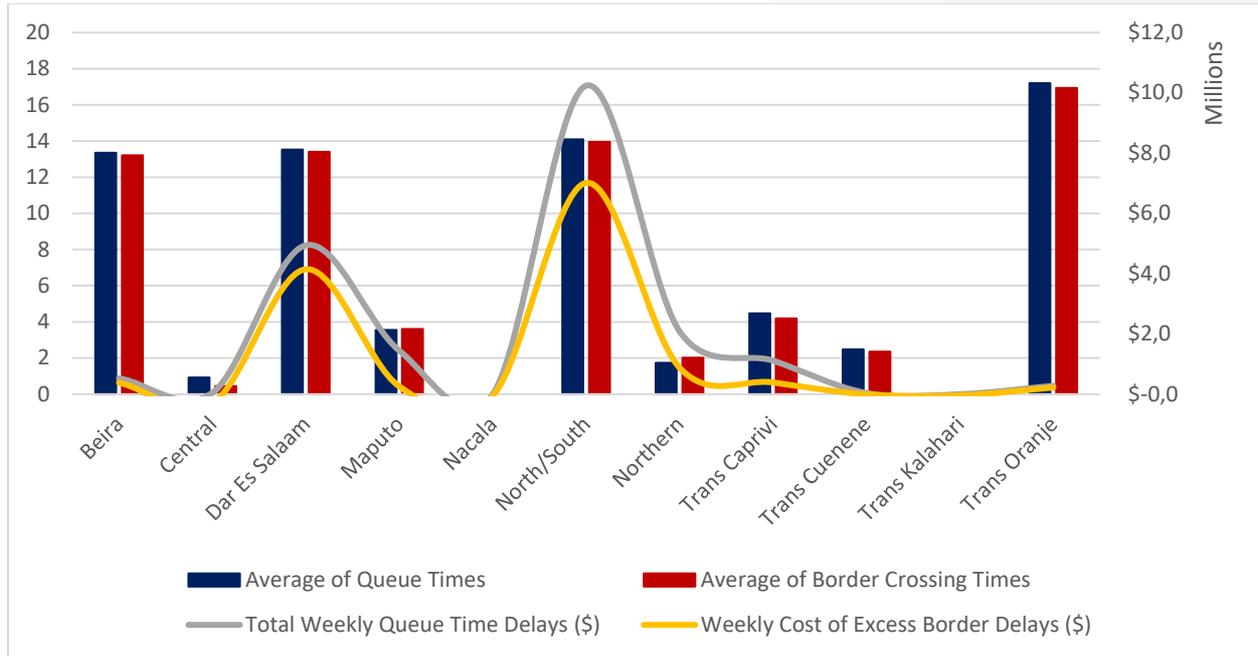
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 19/10/2025.

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 19/10/2025.

In summary, cross-border queue time averaged **~6,5 hours** (down by **~0,5 hours** from the previous week's **~7,0 hours**), indirectly costing the transport industry an estimated **\$20,7 million (R359 million)**. Furthermore, the week's average cross-border transit times also hovered around **~6,4 hours** (down by **~0,7 hours** from the **~7,0 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$12,9 million (R223 million)**. The total indirect cost for the week amounts to an estimated **~\$33,6 million (R582 million)**, down by **↓14%** from the **~R676 million** in the previous report).

#### 4. International Update

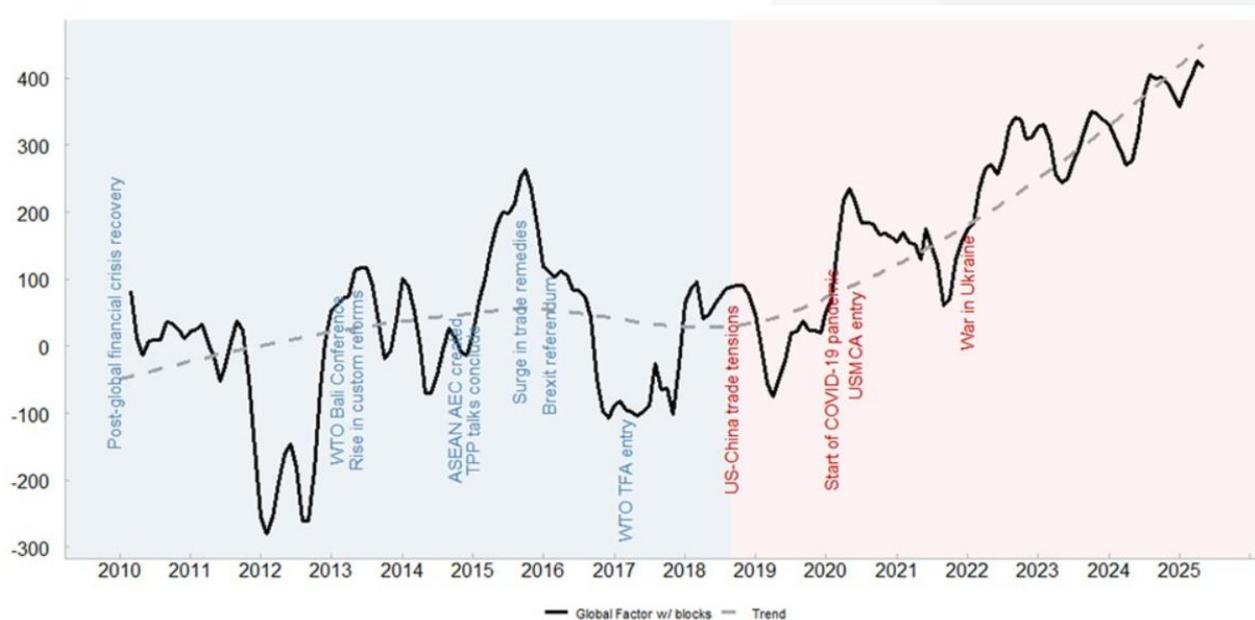
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** global trade policy, **(b)** the global shipping industry, and **(c)** the global aviation industry.

##### a. Global trade policy

The World Trade Organisation (WTO) and the International Monetary Fund (IMF) have jointly developed a new *“Global Trade Policy Activity Index”*, an innovative analytical tool designed to provide an early indication of changes in trade policy stances across economies.<sup>13</sup> Drawing on a wide range of official sources and text-based analyses, the index tracks the frequency and intensity of trade policy actions – including tariff adjustments, export controls, and liberalisation measures – to offer a near real-time view of evolving trade dynamics. According to the WTO's latest findings, the index reveals a notable increase in trade-policy activity by member states since 2023.

<sup>13</sup> WTO. 24/10/2025. [WTO and IMF economists develop new indicator to measure global trade policy dynamics.](#)

Figure 15 – Trade Policy Activity Index



Source: [WTO](#) via Centorrino, Diakantoni, Keck, Ruta, Sztajerowska and Wei (2025).

Both liberalising and restrictive measures have risen, reflecting governments’ heightened responsiveness to shifting global conditions such as supply chain reconfiguration, geopolitical tensions, and the green transition. The data highlight that trade policy is becoming more interventionist and reactive, suggesting that countries are using trade instruments more actively as part of their macroeconomic and industrial strategies. For logistics and trade-related sectors, these findings signal a more fluid and uncertain policy landscape, highlighting the importance of monitoring regulatory changes that can influence costs, routing decisions, and market access. The ongoing US-China relationship, among many other uncertainties, is set to continue to drive the index up.

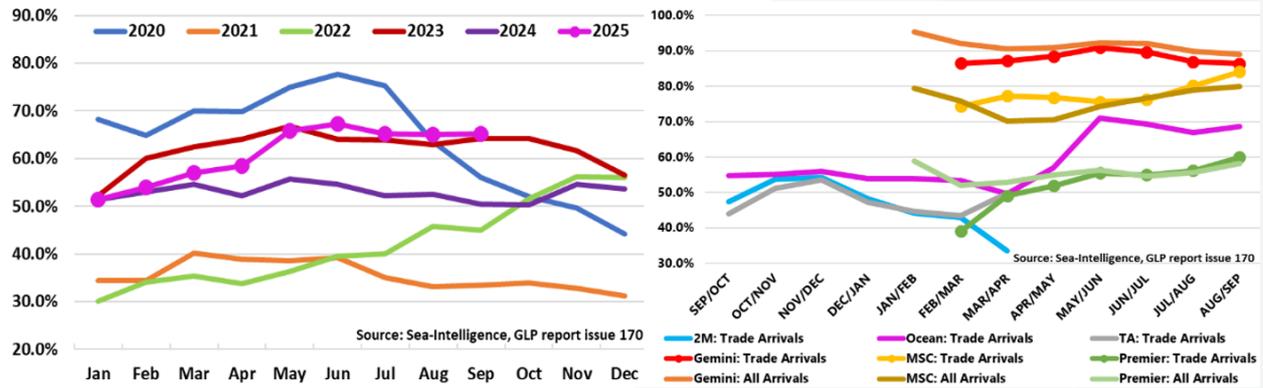
## b. Global shipping industry

### i. Global schedule reliably and container industry summary

According to *Sea-Intelligence’s* Global Liner Performance (GLP) report, global schedule reliability reached a plateau in September, marginally improving by **↑0,1%** to **65,2%**.<sup>14</sup> The last five months have all been in the mid-60s range, as illustrated below. Year-on-year improvements remain tangible (at **↑14,7%**), as the average delay for late vessel arrivals remained stable at **4,88 days**. Among the top-13 carriers, Maersk led with a reliability of **77%**, followed by Hapag-Lloyd at **74%**; meanwhile, Wan Hai Lines recorded the lowest reliability at **48%**. On the alliance level, the Gemini Cooperation achieved **89%** reliability for all arrivals and **86%** for trade-arrivals; by contrast, the Premier Alliance scored **58%** (all-arrivals) and **60%** (trade-arrivals).

<sup>14</sup> Murphy, A. 25/03/2025. [Global schedule reliability plateaus around the 65% mark.](#)

Figure 16 – Global Schedule Reliability (%) and Alliance Schedule Reliability (days)

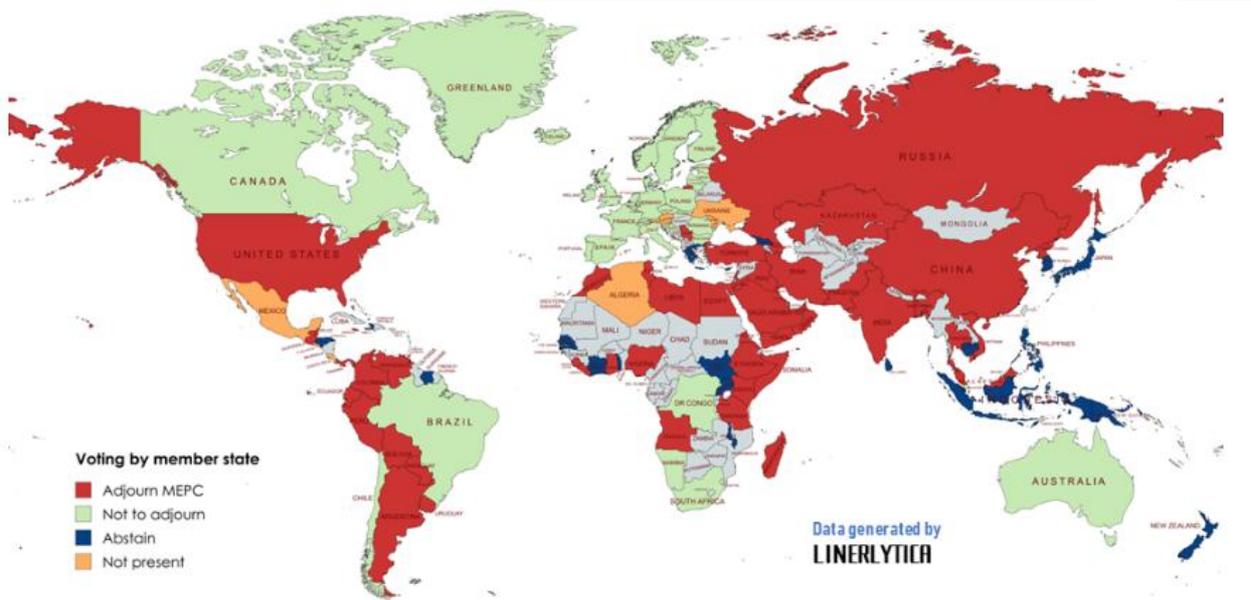


Source: [Sea Intelligence](http://Sea Intelligence)

ii. IMO Marine Environment Protection Committee

The IMO’s 17 October vote to postpone the Net-Zero Framework exposed a sharp divide among member states, with the EU and small island nations advocating for decarbonisation, while the US, China, Russia, and most of Asia opposed carbon pricing measures.

Figure 17 - Voting by member state



Source: [Linerlytica](http://Linerlytica)

Despite the delay, new containership orders continue to surge, with the global orderbook now exceeding **33%** - its highest level since 2009 – as carriers persist with fleet expansion plans.

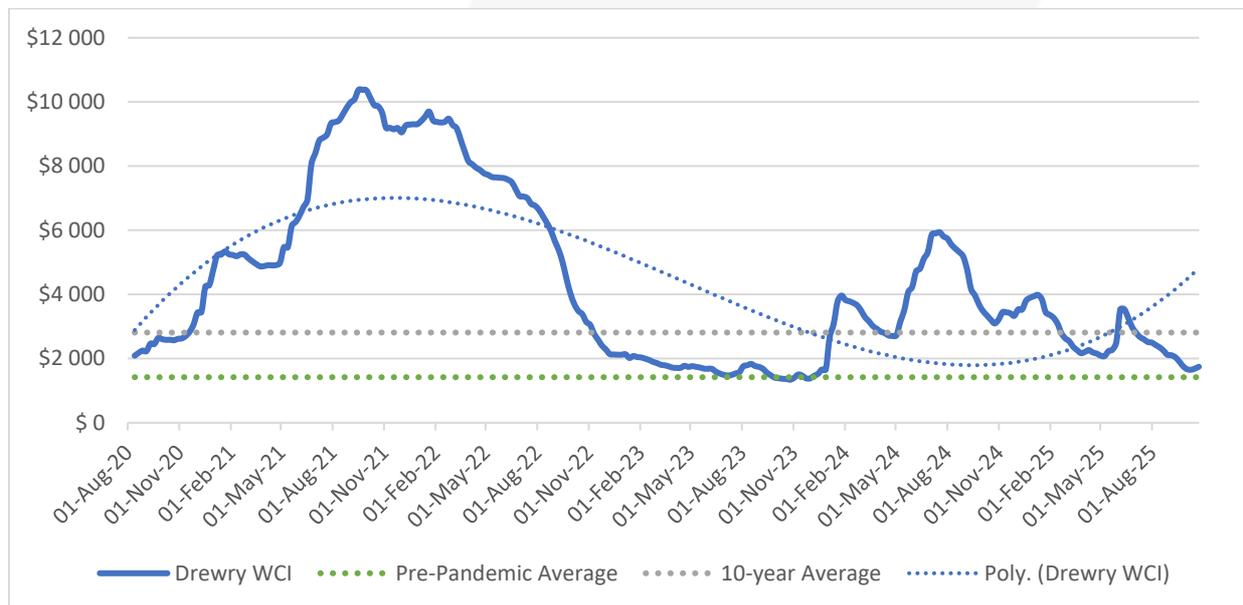
### iii. Container industry summary

Carriers are proceeding with their 1 November rate increases after retaining mid-October gains, supported by improved sentiment amid expectations of an imminent US–China trade deal.<sup>15</sup> The latest quarterly results from major forwarders indicate a challenging environment of restructuring and volume pressure – as K+N narrowly retains its position as the largest forwarder on the planet.<sup>16</sup> Meanwhile, new data show volume ‘carnage’ at top US ports – down approximately **↓6,6%** year-on-year – signalling potentially multi-year declines in activity.<sup>17</sup> While port traffic has remained largely unaffected in the specific US–China corridor – aside from limited ship diversions – the resolution of tariff and port-fee uncertainties may temper rate momentum as the market enters the traditional November slack season, with excess capacity still weighing on freight rates, as shown below.

### iv. Global freight rates

According to Drewry's latest “*World Container Index*”, freight rates rose by **↑3,5%** (or **\$59**) to **\$1 746 per 40-ft container** this week.<sup>18</sup> The uptick was mainly driven by increases on several major Shanghai outbound trades, including **(1)** Shanghai to Los Angeles (**↑4%** to **\$2 290**), **(2)** Shanghai to New York (**↑6%** to **\$3 420**), **(3)** Shanghai to Rotterdam (**↑4%** to **\$1 736**), and **(4)** Shanghai to Genoa (**↑2%** to **\$1 855**). Shipping lines are feeling the pressure, as rates have dropped to pre-pandemic levels.<sup>19</sup> Consequently, carriers have tried their best to **(1)** drive tariffs through GRIs and FAKs (Freight All Kinds); **(2)** actively implement capacity management and routing changes (blank sailings are trending at an **8% cancellation rate** of Pro-forma scheduling<sup>20</sup>); and have **(3)** attempted to follow a hard-line approach to seasonal contract negotiations to maintain capacity despite elevated supply. As the supply-demand balance remains weak, this week’s increases might be short-lived in the absence of stronger demand.

Figure 18 – World Container Index (WCI)



Source: Calculated from [Drewry](#)

<sup>15</sup> Linerlytica. 27/10/2025. [Market Pulse – Week 43](#).

<sup>16</sup> Van Marle, G. 23/10/2025. [It’s crunch time - the World’s Forwarding Giants unveil Q3 numbers](#).

<sup>17</sup> Van Marle, G. 28/10/2025. [Volume carnage at US Ports from tariff turmoil will lead to multi-year declines](#).

<sup>18</sup> Drewry. 23/10/2025. [World Container Index](#).

<sup>19</sup> Goldstone, C. 27/10/2025. [Liners feel the pressure as spot rates sink to pre-pandemic levels](#).

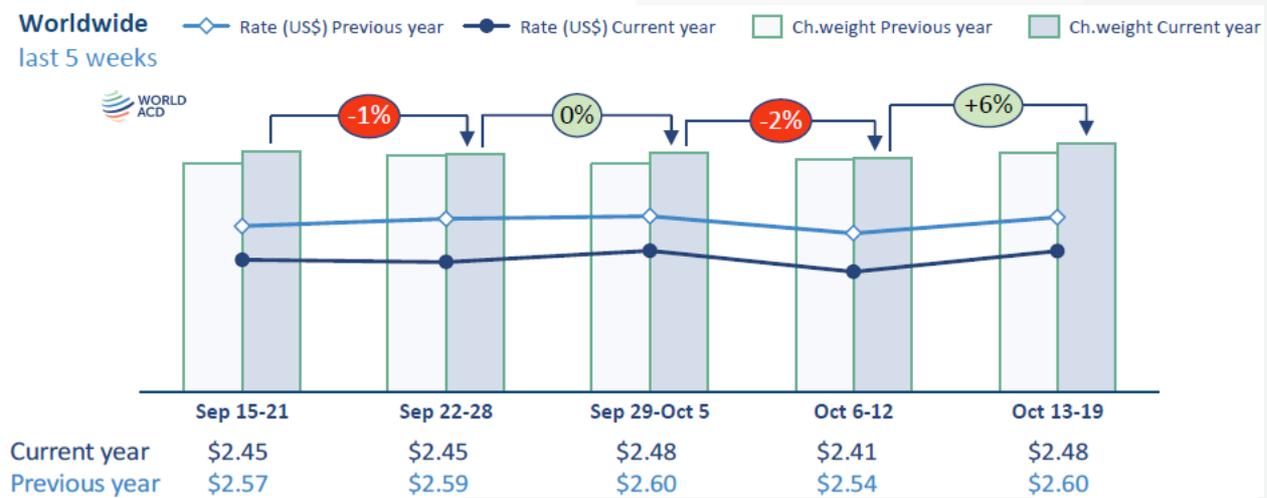
<sup>20</sup> Drewry. 24/10/2025. [Cancelled Sailings Tracker](#).

For charter rates, the *Harper Petersen Index* (Harpex) was down again last week and is now trading around **2 182 points** on Friday, which is still some **↑11%** above last year’s level, but has slowly started to decline after the prolonged surge.<sup>21</sup>

**c. Global air cargo industry**

According to high-frequency metrics from World ACD, global air cargo markets rebounded strongly in mid-October, with worldwide tonnages up by **↑6%** week-on-week following the Asia-Pacific holiday lull. The recovery was driven primarily by a **↑14%** surge in volumes from Asia-Pacific origins, led by China, Hong Kong, Taiwan, and South Korea, which all saw double-digit gains. This renewed activity also lifted average worldwide airfreight rates by **↑3%** to **\$2,48 per kilogram**, restoring them to pre-holiday levels.

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



Source: [World ACD](#)

Although still about **↓4%** below the same week last year, the uptick signals renewed momentum in international air logistics, supported by both stronger demand from Asia and a higher share of premium, time-sensitive cargo.

In other aviation news, IATA has released the updated 2026 editions of its key cargo and ground-operations manuals, incorporating close to 100 significant changes to reflect evolving global standards.<sup>22</sup> The updates include strengthened regulations for lithium-battery shipments under the Dangerous Goods Regulations and Battery Shipping Regulations, enhanced welfare and container standards in the Live Animals Regulations, and digital-tool enhancements – including an online portal for the Live Animals Regulations and a battery-classification tool.

**ENDS<sup>23</sup>**

<sup>21</sup> Harpex. 24/10/2025. [Harper Petersen Index](#).

<sup>22</sup> IATA. 27/10/2025. [IATA Updates Cargo and Ground Operations Manuals](#).

<sup>23</sup> **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.*