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Cargo Movement Update #243[1]

Date: 20 July 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)	47 348	53 943	**101 291**	40 652	46 315	**86 967**	↑16%
Air Cargo (tons)	4 246	2 101	**6 347**	3 805	2 184	**5 989**	↑6%

Monthly Snapshot

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

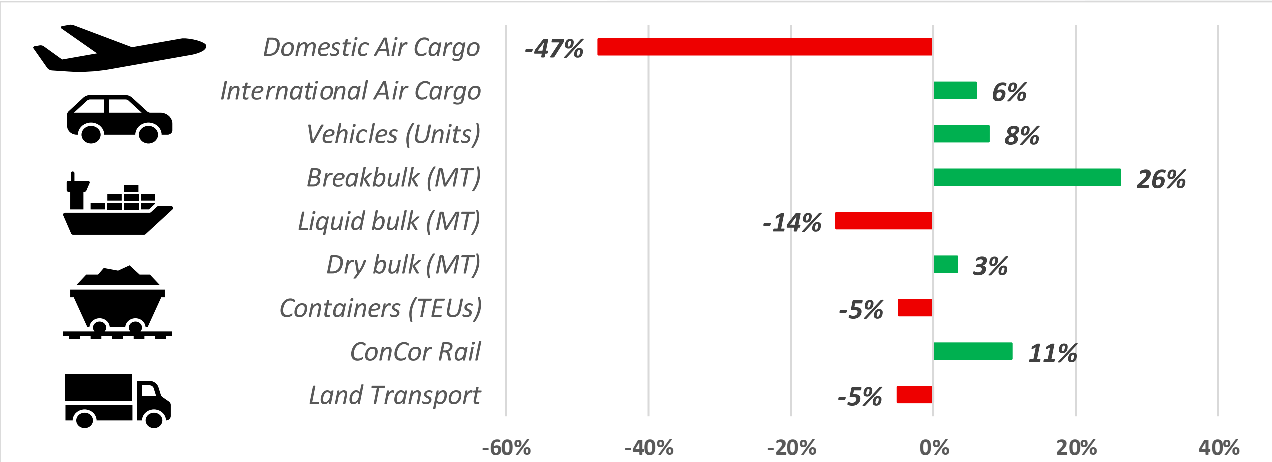
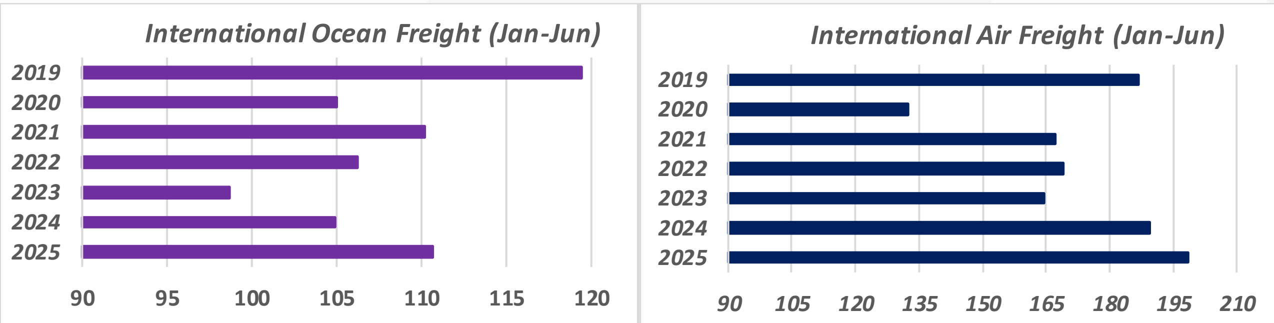


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~14 470 TEUs** was handled per day, with **~12 424 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **1 950** containers, down by **↓48%** from last week.
- Cross-border queue: **↓0,4 hrs**; transit: **↓0,5 hrs**; SA borders: **9,5 hrs** (**↓10%**); SADC: **4,6 hrs** (**↓2%**).
- Global containership capacity increased by **2,43 million TEU** (**↑8,1%**, y/y) – notably driven by African trade.
- Global spot rates declined for a 5th consecutive week (by **↓2,6%**, or **$70**) to **$2 602/40ft**.
- Global air cargo tonnages declined for a 2nd straight week, as rates edged up by **↑1%** (w/w) to **$2,65/kg**.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *243rd* 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: June vs June.
[5] Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, another record average of **14 470 TEUs** was handled daily, significantly up from **12 424 TEUs** the previous week. Despite achieving a record container throughput, smooth functioning port operations were still challenged by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages. Specifically, inclement weather constrained operations at the Port of Cape Town, while the main operational challenges in Durban proved to be continuous equipment breakdowns and adverse weather. Vacant berths, agent delays, and poor weather mainly impacted operations at our Eastern Cape Ports; however, minimal delays were reported at the Port of Richards Bay. The latest reports from Maersk indicate that the MSC Nahara will skip the Port of Durban upon completing operations at Coega, and the APL Holland will bypass the Port of Cape Town, proceeding directly to Coega. The latest reports from TFR indicate that the annual shutdown on the line between Pretoria and Durban commenced on Monday and will continue for the next week. Additionally, TFR reported a derailment near Dassenhoek, Durban, recently. The latest reports suggest that the whole ConCor line will be affected until Monday afternoon around 16:00.

Global containership capacity rose by **↑8,1%** year-on-year, with **2,43 million TEU** added, largely due to new vessel deliveries and minimal scrapping. Africa absorbed **23% of this capacity**, while overcapacity on Asia–South America routes is disrupting alliances and pressuring rates. South Korea remains the leader in shipbuilding by capacity, but China is poised to dominate future orders and potentially become the global leader. Freight rates continue to decline, though charter activity is slowing as demand softens. Despite this, vessel availability remains tight, sustaining elevated rates in the charter market even as operators adopt a more cautious approach. Further developments include **(1)** new US trade deals and tariffs – as US container trade is down by **↓7,9%** year-on-year in June, and **(2)** no H2 peak expected because of the front-loading earlier.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~607 000 kg** inbound (**↑12%**, w/w) and **~300 000 kg** outbound (**↓4%**). The continued surge in imports appears to be in response to the US tariff threat scheduled for August. The current levels indicate that cargo is trending at approximately **↑5%** (y/y) above the same level as last year, and about **↑7%** (y/y) above the comparative levels of pre-pandemic 2019. Internationally, air cargo volumes dipped slightly for a second consecutive week, although overall capacity remained stable and average spot rates held firm. Africa recorded a **↑6%** rise in tonnages over the past two weeks, highlighting positive regional momentum amid otherwise mixed global trends.

Cargo movements along the N4 corridor increased slightly for both road and rail transport. Some operations delays were reported this week, including a derailment on the Ressano rail to Maputo on Tuesday. Truck volumes through the border post were **1 675 HGVs per day** (**↑3%**, w/w). Queue times remained stable at an average of **4,9 hours** (no change) at the border, as did the average processing time (**4,6 hours**) per crossing. The rail to Maputo increased slightly to an average of **nine trains daily** (up by **one** from last week). Sugar trains from Eswatini were steady at around **two trains a day**.

Land border crossing times decreased at South African borders while remaining primarily unchanged throughout the rest of the SADC region. Overall, the average queue time decreased by approximately **half an hour** from last week, while transit time also decreased by around **half an hour**. The median border crossing times at South African borders decreased by **an hour**, averaging **~9,5 hrs** (**↓10%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased slightly, averaging **~4,6 hrs**

(**↓2%**). On average, two SADC borders took more than a day to cross last week, namely Beitbridge and Kasumbalesa (the worst affected, with an average of **two days** from **the Zambian side**). These two border posts continue to cause significant delays on the respective North/South and Dar corridors. Other developments of note include **(1)** South African immigration and driver entry delays (and minor SARS downtime), **(2)** CBRTA operations update, **(3)** minor N4 corridor disruption, and **(4)** BURS operations fully functioning.

In summarising this edition, recent weeks have delivered encouraging throughput gains (including **record container throughput last seen in 2017/18**), underpinned by operational improvements, improved equipment utilisation, and deepened collaboration across stakeholders. These achievements reflect hard-won progress and signal that the system is responding to long-standing calls for reform. However, the current upswing brings us closer to the limits of existing port capacity. Without accelerated investment and structural upgrades, further growth may be constrained. It is therefore vital that these operational gains be matched with expanded terminal capacity, modernised infrastructure, and, critically, a stable policy environment. As a small, open economy integrated into global shipping networks, South Africa must remain ready, reliable, and open for business – ensuring that recent progress is not only celebrated but sustained.

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 14 to 20 July (measured in TEUs)

7-day flow reported (14/07/2025 – 20/07/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 318	37 224	↑3%
New Pier (Pier 1)	2 485	17 393	↑11%
Cape Town Container Terminal	2 847	19 931	↑52%
Ngqura Container Terminal	2 487	17 411	↑20%
Port Elizabeth Container Terminal	580	4 059	↑121%
Other	753	5 273	↓9%
Total	**14 470**	**101 291**	↑16%

Source: Calculated from TPT, 2025. Updated 20/07/2025.

A record average of **~14 470 TEUs** (↑16%) was handled per day for the last week (*14 to 20 July, Table 2*), significantly above the projected average of **~12 609 TEUs** (↑15% actual versus projected). This level of container throughput was last seen in the heights of 2017/18.

For the coming week, a slightly decreased average of **~12 601 TEUs** (↓13%) is predicted to be handled (*21 to 27 July*, *Table 3*). Despite achieving a record container throughput, smooth functioning port operations were still challenged by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages.

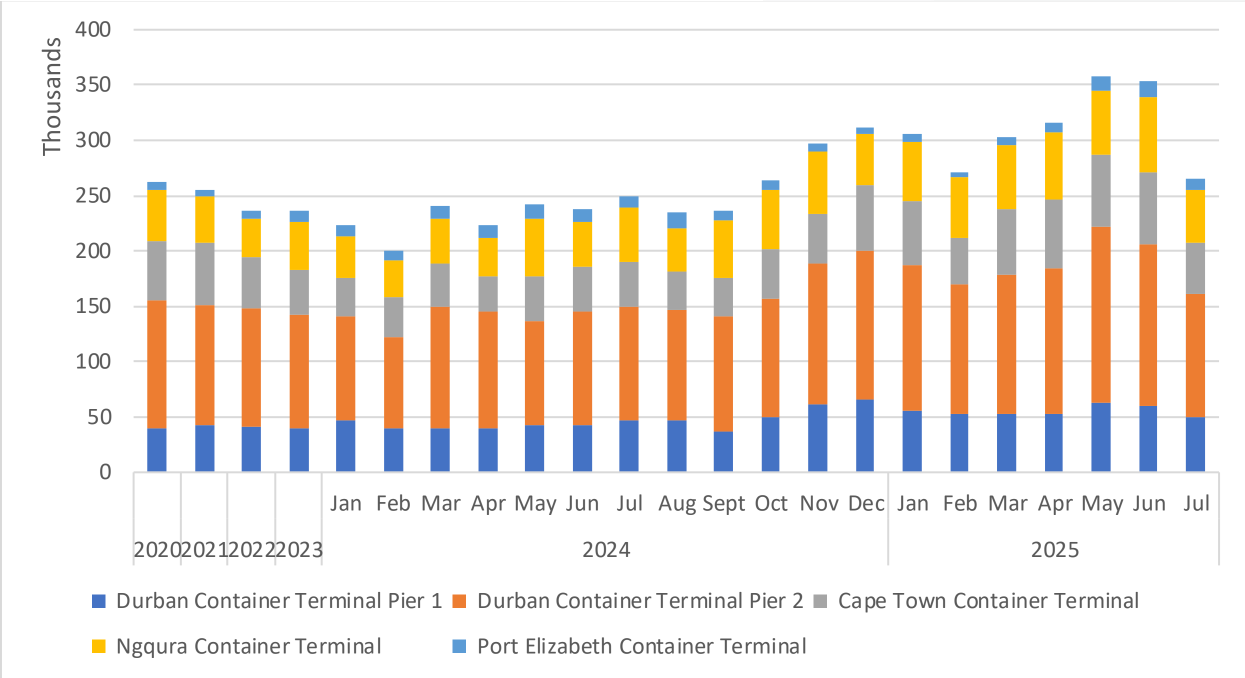
Table 3 – Container Ports – Weekly flow projected for 21 to 27 July (measured in TEUs)

7-day flow projected (21/07/2025 – 27/07/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 392	37 743	↑1%
New Pier (Pier 1)	2 067	14 468	↓17%
Cape Town Container Terminal	1 739	12 170	↓39%
Ngqura Container Terminal	2 067	14 471	↓17%
Port Elizabeth Container Terminal	493	3 453	↓15%
Other	843	5 903	↑12%
Total	**12 601**	**88 208**	↓13%

Source: Calculated from TPT, 2025. Updated 20/07/2025.

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.

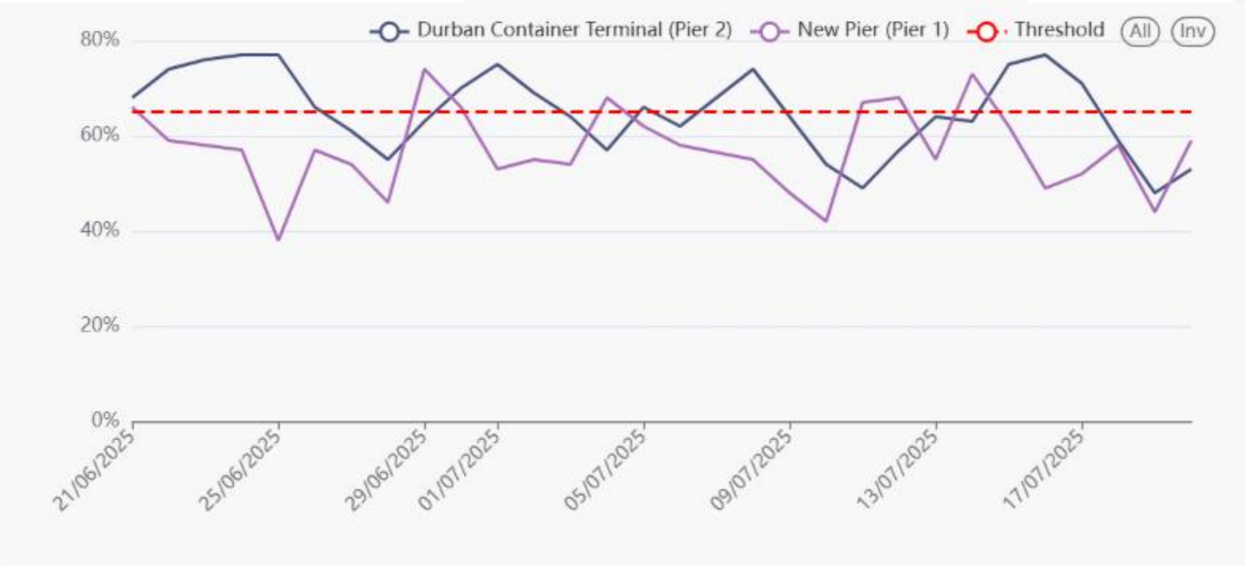
Figure 3 – Monthly flow reported for total container movement (thousands, 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 20/07/2025.

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

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



Source: Calculated using data from Transnet, 2025, and updated 20/07/2025.

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 June to present, day on day)

Source: Calculated using data from Transnet, 2025, and updated 20/07/2025.

b. Summary of port operations

i. Weather and other delays

- Inclement weather constrained operations at the Port of Cape Town.
- The main operational challenges in Durban proved to be continuous equipment breakdowns and adverse weather.
- Vacant berths, agent delays, and poor weather mainly impacted operations at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

ii. Cape Town

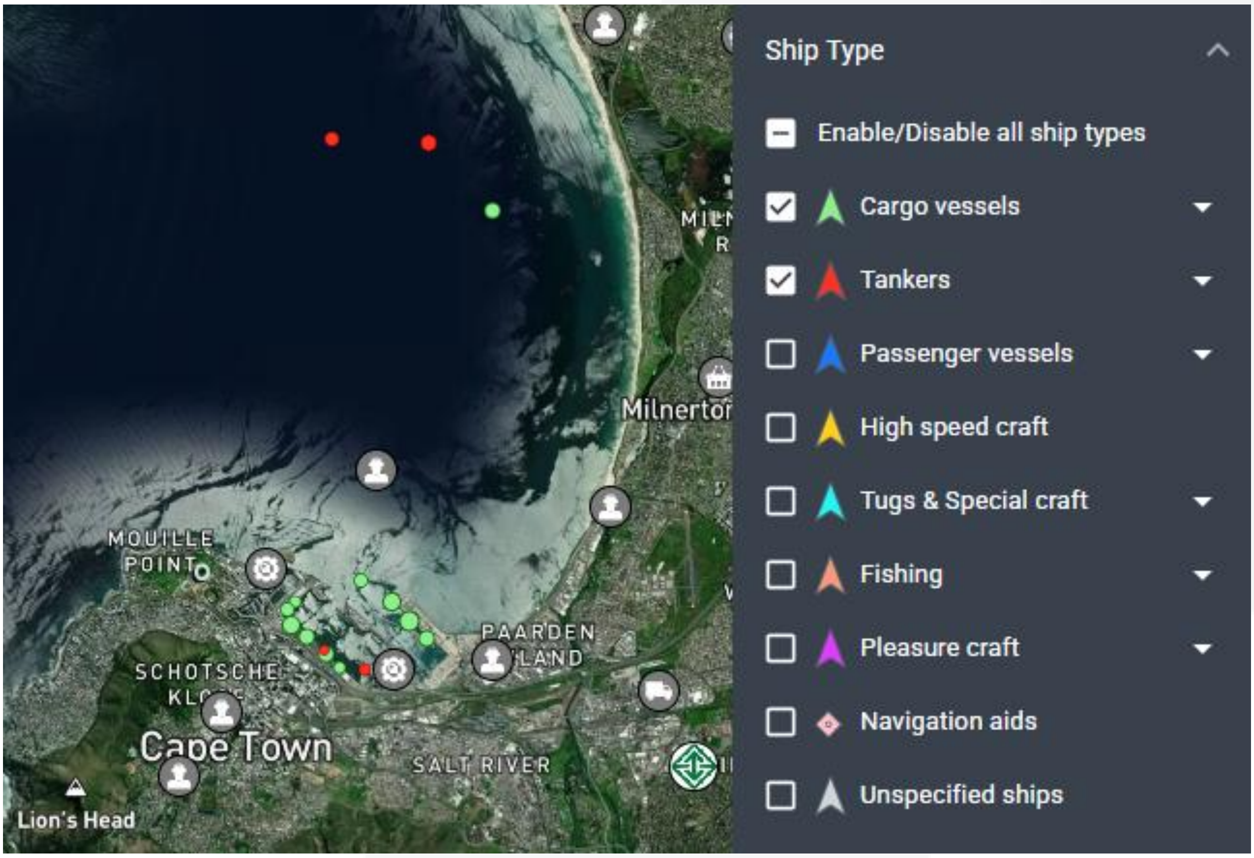
On Friday, CTCT recorded two vessels at berth and one at anchor, as adverse weather and equipment challenges proved to be the primary operational constraints at the port. On the landside, between Monday and Friday, the terminal managed to service at least 6 045 trucks while handling approximately 263 rail units. On the waterside, the terminal executed approximately 10 475 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 47%**, **reefers at 43%**, and **empties at 63%**. Additionally, the terminal operated with **seven STS cranes**, **21 RTGs**, and **57 hauliers** towards the end of the week. Cranes LC3 and LC9 were out of commission before the weekend with no ETR communicated yet.

The latest reports from Maersk suggest that the APL Holland will omit the Port of Cape Town and proceed directly to Coega due to adverse weather conditions experienced at other ports. As a result, all export bookings will be transferred to the Maersk Chennai 528E. Additionally, all import containers scheduled initially for discharge in Cape Town will now be discharged in Coega and will be rerouted accordingly for onward transport to their respective destinations.

On Friday, CTMPT recorded two vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal successfully handled 746 tons and 151 container moves on the waterside, despite operations being impacted by inclement weather for approximately ten hours. On the landside, 73 trucks were processed during the same period. Stack occupancy was recorded at 0% for general cargo, 0% for reefers, and 1% for empties. Towards the end of the week, the terminal operated with three cranes (two of which were operational spreaders) and four straddle carriers.

Between 7 and 13 July, the FPT terminal handled eight vessels: four multi-cargo, one dry bulk, and three container vessels. Berth occupancy during this period was recorded at 86%. The terminal planned to handle nine more vessels between 14 and 20 July, with another nine vessels scheduled between 21 and 27 July. Inclement weather as well as the late arrival of cargo accounted for the most significant operational constraints during this period.

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



Source: Marine Traffic. Updated 20/07/2025 at 14:00.

iii. Durban

The latest reports from Maersk suggest that the MSC Nahara will omit the Port of Durban upon completing operations at Coega. As a result, exports (dry) will be loaded on the Maersk Vallvik 528N and connected to the Maersk Cap Carmel 528N in Cape Town, while reefer exports will be loaded on the Maersk Vallvik 528N and connected to the MSC Carmen 529N.

On Friday, Pier 1 recorded two vessels on the berth, with zero vessels at anchor. Stack occupancy was **58%** for **GP containers** and **53%** for **reefers**. Between Monday and Friday, the terminal executed at least 6 509 gate moves and 319 rail moves on the landside. The **average TTT** for the week was **~57 minutes** (**↓7%**, w/w) and an average **staging time** of **~61 minutes** (**↑79%**). Additionally, the terminal moved over 10 047 TEUs across the quay on the waterside during the same period. The terminal had **six STS cranes** and **18 RTGs** available towards the end of the week.

Pier 2 had four vessels on berth and one at anchorage on Friday, as equipment breakdowns and adverse weather prevented optimal operational performance this week. Stack occupancy was recorded at **59%** for **GP containers** and **41%** for **reefers**. The terminal operated with **11 gangs** and moved over **16 300** containers across the quay between Monday and Friday on the waterside. Approximately 14 243 gate moves were executed on the landside during the same period. The **average TTT** for the week was **~75 minutes** (**↓7%**, w/w) and an average **staging time** of **~81 minutes** (**unchanged**). Approximately 1 225 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **61** and **76** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **63%** during this period. Towards the end of the week, the most notable crane absences were Cranes 520, 523, 530, and 534; however, these machines (except Crane 520) were expected to return to operation before the weekend.

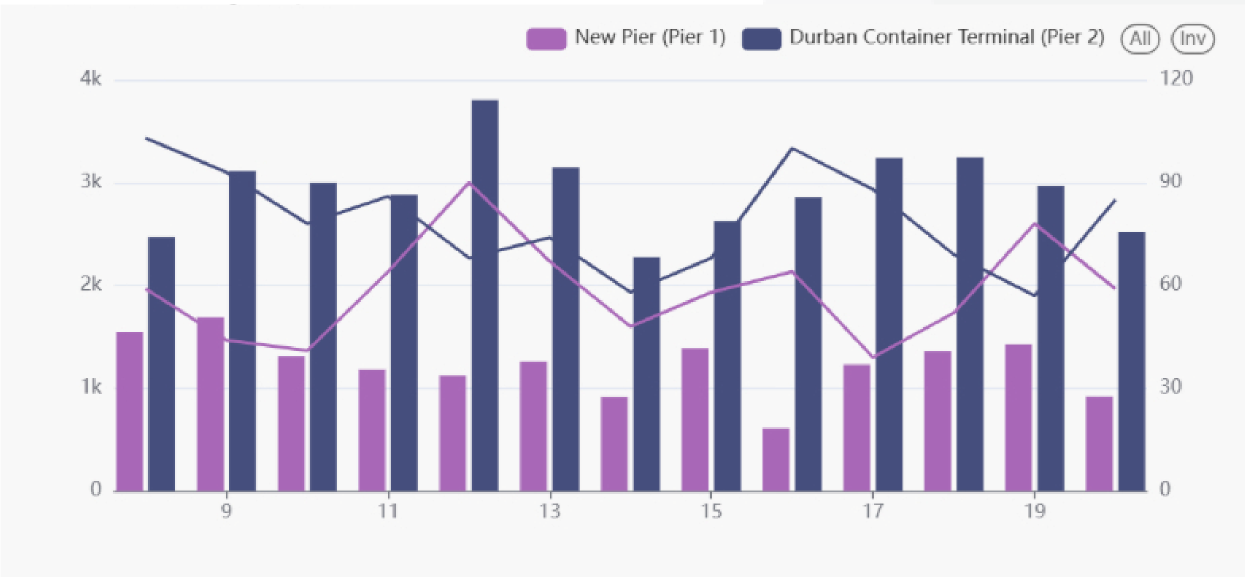
Durban's MPT terminal recorded zero vessels at berth on Thursday and none at outer anchorage. Stack occupancy for containers was recorded at 23%, the reefer stack at 18%, and the breakbulk stack at 45%. In the preceding 24 hours, 329 containers were handled on the waterside. On the landside, 326 container trucks were serviced at a TTT of ~22 minutes. Additionally, 13 breakbulk trucks, containing 219 tons, were serviced. During this period, three cranes, eight reach stackers, seven forklifts, and 20 ERFs were in operation. The latest reports from TPT indicate that the third crane has returned to operations as anticipated, while the fourth crane is scheduled to return to service around 21 December.

Between Wednesday and Thursday, the Maydon Wharf MPT recorded one vessel at berth and one at anchorage. On the waterside, 951 tons were handled across the quay, while 13 RMTs, containing approximately 482 tons, were serviced on the landside. During the same period, the agri-bulk facility recorded one vessel at berth and none at anchor. The terminal managed to handle approximately 6 335 tons on the waterside, while no volumes were handled on the landside.

On Friday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with none at anchorage. In the preceding 24 hours, the terminal handled 2 214 road units and 163 units on rail on the landside while 1 737 units were handled on the waterside. Overall stack occupancy was 91%, 30% at Q&R, and 40% at G-berth. During this period, the terminal had 122 high-and-heavy (abnormal loads) on hand and successfully handled 96.

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.

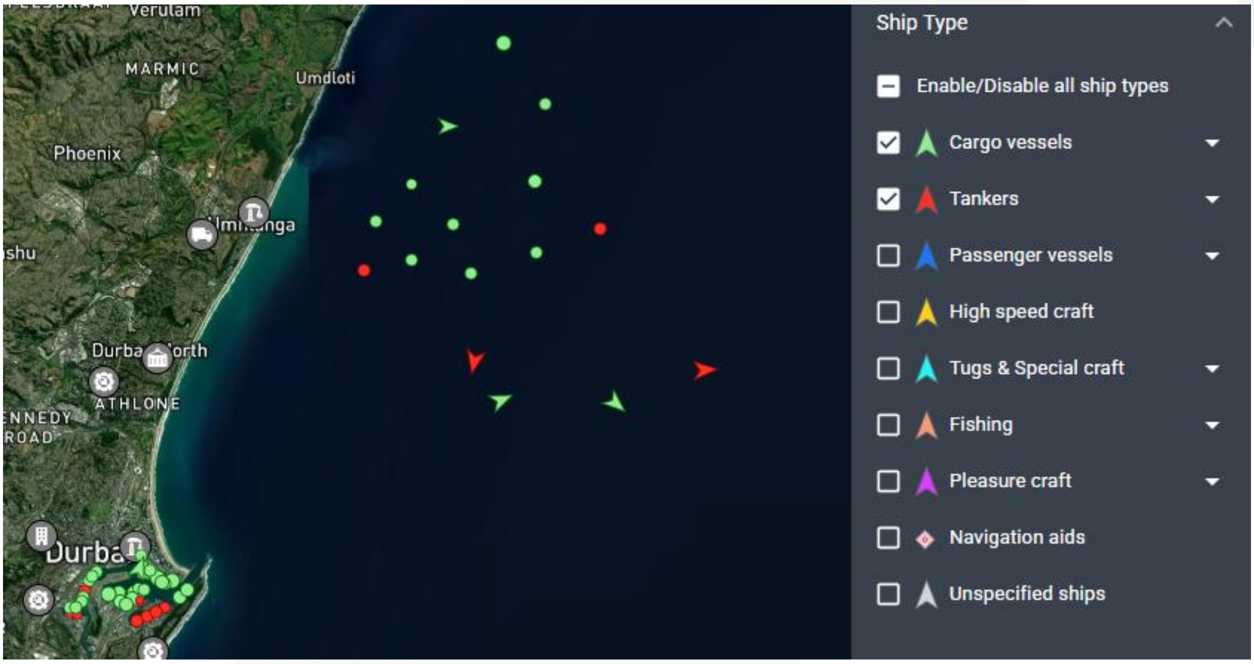
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 20/07/2025.

The queue of container vessels waiting outside Durban has remained low and almost unchanged from last week. On Monday evening (20 July), **zero** container vessels were waiting outside at anchorage for Pier 1, **none** for Pier 2, and **two** for Point. The queue of dry (**five**), liquid (**five**), and breakbulk (**three**) vessels has slightly increased from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 20/07/2025 at 14:00.

iv. Richards Bay

On Friday, the Port of Richards Bay had three vessels at anchor and 13 on the berth, translating to four vessels at DBT, three at MPT, four at RBCT, and two at the liquid bulk terminal. Two tugs and one pilot boat operated for marine resources towards the end of the week. The helicopter was out of commission during this period but is anticipated to return to service over the weekend.

The daily average coal throughput for the week increased to around **152 000 tons** (**↑42%**, w/w). A slightly decreased average of **18 trains** (down by **five** from last week) were serviced on the landside, slightly below the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded two vessels on berth and zero 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 30% for reefers, 38% for reefer ground slots, and 24% for the general stack. Despite having a vacant berth for around six hours, the terminal handled approximately 3 611 TEUs and 160 reefers on the waterside. Approximately 654 trucks were processed on the landside at a TTT of ~33 minutes. Towards the end of the week, the terminal had six STS cranes, 25 RTGs, and 64 hauliers in service.

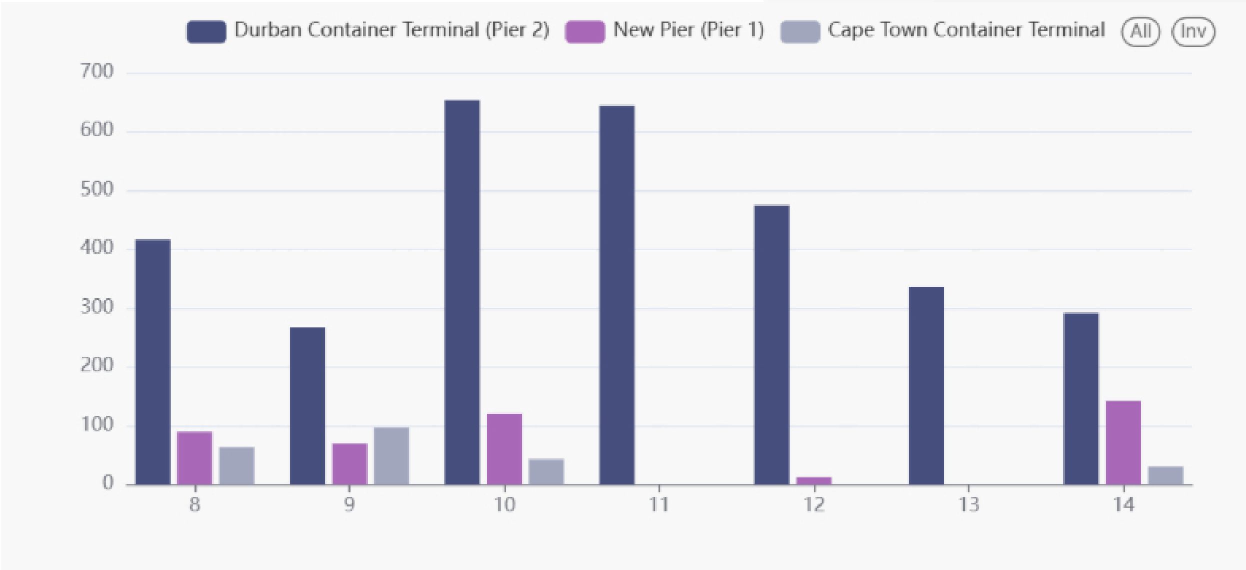
On Friday, GCT had zero vessels at berth and two at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 207 trucks were processed at a TTT of ~24 minutes on the landside, while 262 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 26% for the general stack, 50% for reefers, and 30% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and nine straddles in service.

On Friday, the Ro-Ro terminal had zero vessels on berth and zero at outer anchorage, with the next vessel expected to arrive over the weekend. No volumes were handled during this period. Nevertheless, stack occupancy was recorded at 64%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that the annual shutdown on the line between Pretoria and Durban commenced on Monday. The shutdown will continue for the next week and is expected to result in no trains running on the line. The line is expected to be recommissioned around 25 July. Additionally, TFR reported a derailment near Dassenhoek, Durban, recently. The latest reports indicate that the entire ConCor line will be affected until Monday afternoon, around 16:00. Towards the end of the week, DCT Pier 2 had 270 ConCor units on hand with a dwell time of 96 hours and 289 over-border units with a dwell time of 53 days.

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



Source: Calculated using data from Transnet, 2024. Updated 20/07/2025.

In the last week (*14 to 20 July*), rail cargo on the ConCor line out of Durban was reported at **1 950** containers, down by a significant **↓48%** from the previous week's **3 771** containers.

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 (*14 to 20 July*).[6] For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *July 2024* averaged **~862 534 kg** daily.

Table 4 – International inbound and outbound cargo from OR Tambo

Flows	14-Jul	15-Jul	16-Jul	17-Jul	18-Jul	19-Jul	20-Jul	Week
Volume inbound	514 158	193 380	369 628	330 249	321 148	363 171	2 154 418	**4 246 152**
Volume outbound	118 554	167 620	200 649	198 551	164 287	264 611	986 598	**2 100 870**
Total	**632 712**	**361 000**	**570 277**	**528 800**	**485 435**	**627 782**	**3 141 016**	**6 347 022**

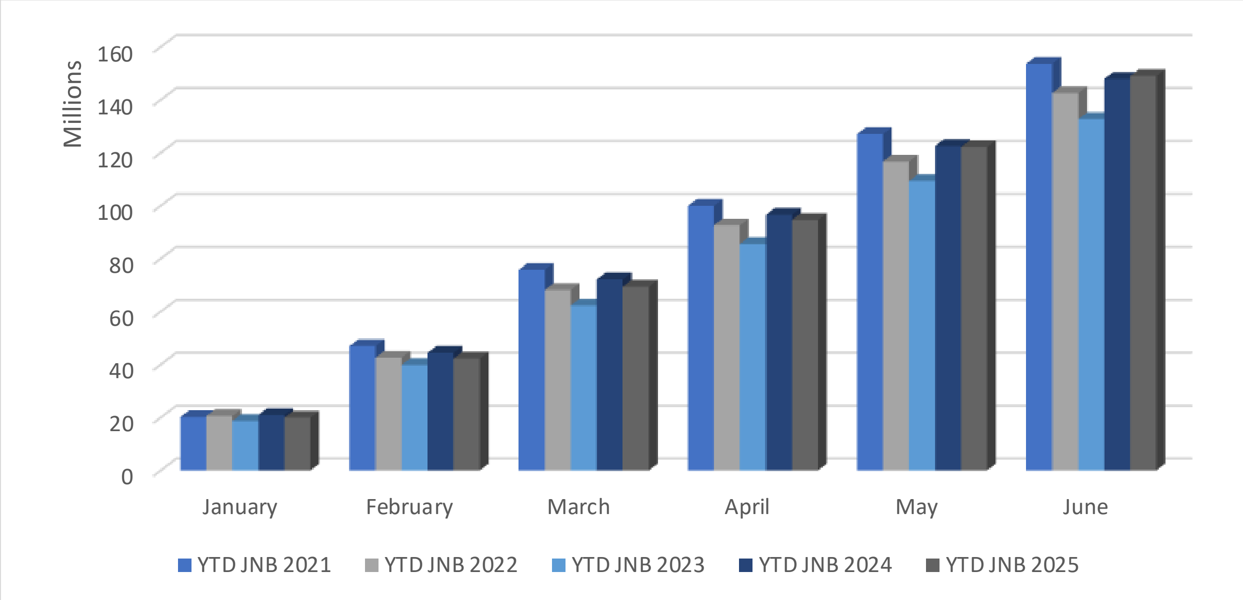
Courtesy of ACOC. Updated: 20/07/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~607 000 kg** inbound (**↑12%**, w/w) and **~300 000 kg** outbound (**↓4%**). The continued surge in imports appears to be in response to the US tariff threat scheduled for August. The current levels indicate that cargo is trending at approximately **↑5%** (y/y) above the same level as last year, and about **↑7%** (y/y) above the comparative levels of pre-pandemic 2019.

The following figure shows the international air cargo flows year-to-date to and from OR Tambo since the start of 2021:

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

Figure 10 – International cargo for OR Tambo – volumes year-to-date (kg millions)



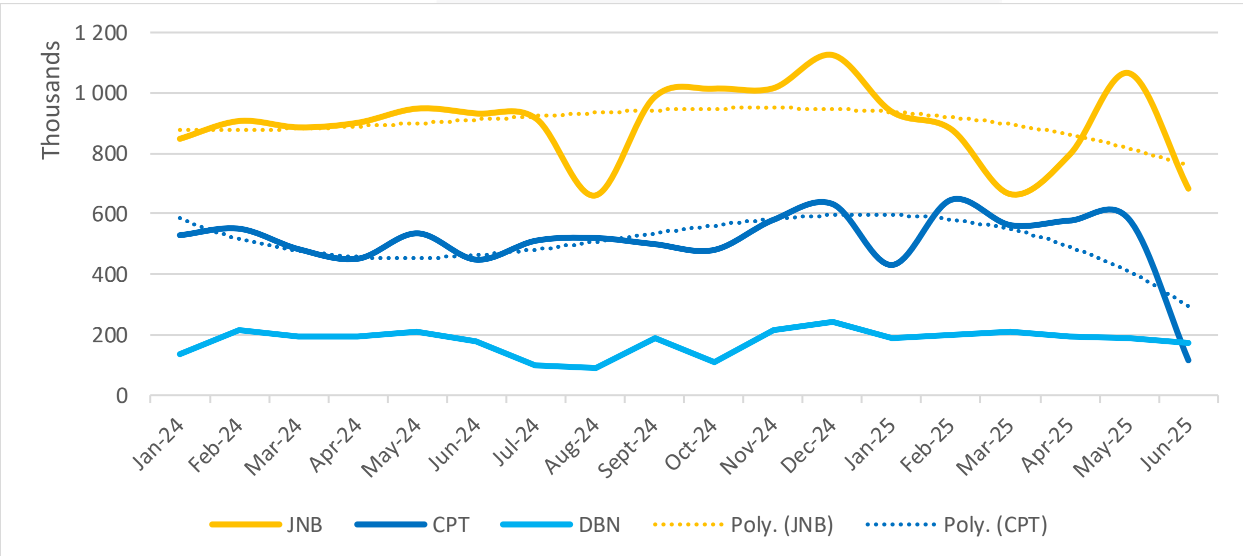
Calculated from ACOC. Updated: 20/07/2025.

The current levels are above last year by **↑1%** (y/y) and catching up to the levels of 2021 (still **↓3%**), when the industry experienced a significant uptick post-COVID.

b. Domestic air cargo

The following figure shows the movement since the start of last year, with the drop-off for June noticeable:

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 20/07/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*14 to 20 July*), cargo movements along the N4 corridor increased slightly for both road and rail transport. Some operations delays were reported this week, including a derailment on the Ressano rail to Maputo on Tuesday. The following notes summarise the recent developments:

- Truck volumes through the border post were **1 675 HGVs per day** (**↑3%**, w/w).
- Queue times were stable at an average of **4,9 hours** (**no change**) at the border, as the average processing time was also stable at around **4,6 hours** (**no change**) per crossing.
- The rail to Maputo increased slightly to an average of **nine trains daily** (up by **one** from last week). Sugar trains from Eswatini were steady at around **two trains a day**.

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

Table 5 – Lebombo border post update

Date 06h00 Daily	Total Trucks Entering KM4	Total Trucks Exit KM4	Mineral Trucks	General Cargo (incl. critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Total Trucks inside KM4 staging	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo
Design Capacity	**1 500**	**1 500**	**1 200**	**200**	n/a	**50**	**50**	**2 000**	**20**	**10**	**6**	**4**
14-Jul-25	1 701	1 696	1 416	148	7	115	10	292	**10**	9	*	1
15-Jul-25	1 642	1 503	1 214	220	26	85	2	227	**8**	5	1	2
16-Jul-25	1 660	1 649	1 176	315	30	99	29	261	**14**	11	*	3
17-Jul-25	1 356	1 373	899	264	45	81	82	231	**0**	*	*	*
18-Jul-25	1 845	1 728	1 272	310	38	96	47	227	**14**	12	1	1
19-Jul-25	1 694	1 653	1 178	325	27	104	53	216	**14**	10	1	3
20-Jul-25	1 825	1 921	1 503	246	27	91	66	207	**11**	8	1	2
% of design capacity	**112%**	**110%**	**103%**	**131%**	**n/a**	**192%**	**83%**	**12%**	**51%**	**92%**	**17%**	**50%**
% change (d/d)	8%	16%	28%	-24%	0%	-13%	25%	-4%	-21%	-20%	0%	-33%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 20/07/2025.

* = not reported

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 20/07/2025 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 around **half an hour**.
- The median border crossing times at South African borders decreased by **an hour**, averaging **~9,5 hrs** (**↓10%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased slightly, averaging **~4,6 hrs** (**↓2%**).

1. **South African immigration and driver entry**:
    a. Confusion persists among South African law enforcement regarding the application of Section 11 of the Immigration Act, particularly as it pertains to foreign drivers from Zimbabwe and Zambia.
    b. The provision allows entry for up to 90 days without a visa, but inconsistent interpretation has led to enforcement issues at some border posts.
2. **CBRTA Operations**:
    a. A water outage at the CBRTA Head Office on Tuesday necessitated operational adjustments. Permits are now being sent to operators via email, and applications can be processed online or through the Cross-Easy App to maintain service continuity.
3. **Route Disruptions – N4 Corridor**:
    a. Safety warnings were issued late Wednesday regarding the N4 between Mooinooi and Brits due to reported incidents of stone-throwing and rock-dropping from bridges.
    b. Authorities reopened the route by Thursday morning (08:25), following risk mitigation interventions.
4. **Botswana customs systems performance**:
    a. The BURS (Botswana Unified Revenue Service) customs system remains fully operational. However, SARS experienced declaration processing delays earlier in the week, attributed to abnormally high cargo volumes.

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

Table 6 – Delays[7] summary – South African borders (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	459	24,2	5,5	24,0	13 770	3 213
Beitbridge	Zimbabwe-SA	475	13,0	2,5	12,6	14 250	3 325
Groblersbrug	SA-Botswana	224	13,4	1,3	13,2	6 720	1 568
Martin's Drift	Botswana-SA	191	2,7	0,5	2,4	5 730	1 337
Kopfontein	SA-Botswana	216	9,8	1,3	9,5	6 480	1 512
Tlokweng	Botswana-SA	20	0,5	0,2	0,3	600	140
Vioolsdrift	SA-Namibia	30	3,4	1,6	3,2	900	210
Noordoewer	Namibia-SA	20	2,7	0,4	2,4	600	140
Nakop	SA-Namibia	30	5,0	0,5	5,0	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,4	1,1	600	140
Skilpadshek	SA-Botswana	293	6,2	1,6	6,1	8 790	2 051
Pioneer Gate	Botswana-SA	53	0,0	0,0	0,0	1 590	371
Lebombo	SA-Mozambique	1 622	5,6	1,3	5,3	48 660	11 354
Ressano Garcia	Mozambique-SA	1 560	1,4	0,2	1,2	46 800	10 920
Sum/Average		**5 213**	**6,4**	**1,2**	**6,2**	**156 390**	**36 491**

Source: TLC, FESARTA, & Crickmay, week ending 13/07/2025.

Table 7 – Delays summary – Corridor perspective

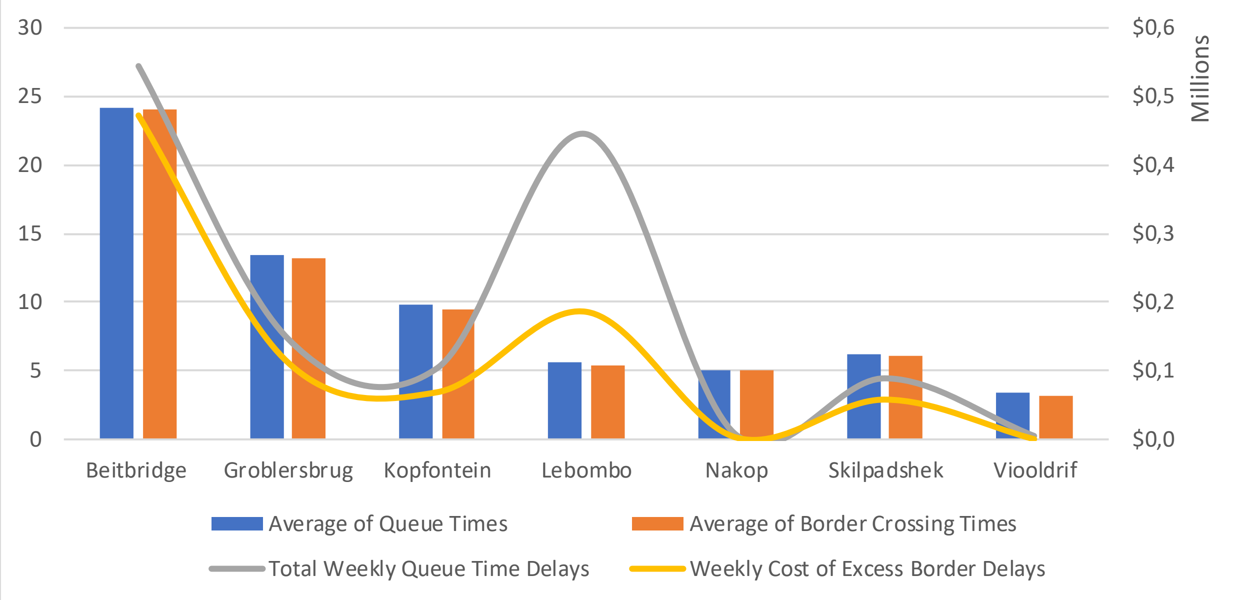
Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	18,9	4,3	18,5	9 600	2 240
Central Corridor	798	0,5	0,0	0,4	23 940	5 586
Dar Es Salaam Corridor	1 819	13,1	0,9	12,9	54 570	12 733
Maputo Corridor	3 182	3,5	0,7	3,3	95 460	22 274
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 542	9,8	1,3	9,6	106 260	24 794
Northern Corridor	2 817	0,9	0,1	0,9	92 520	21 588
Trans Caprivi Corridor	376	2,7	0,6	2,6	11 280	2 632
Trans Cunene Corridor	100	3,1	0,7	2,9	3 000	700
Trans Kalahari Corridor	116	7,5	2,2	7,3	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	**13 297**	**5,2**	**0,7**	**5,1**	**406 920**	**94 948**

Source: TLC, FESARTA, & Crickmay, week ending 13/07/2025.

[7] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[8] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

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

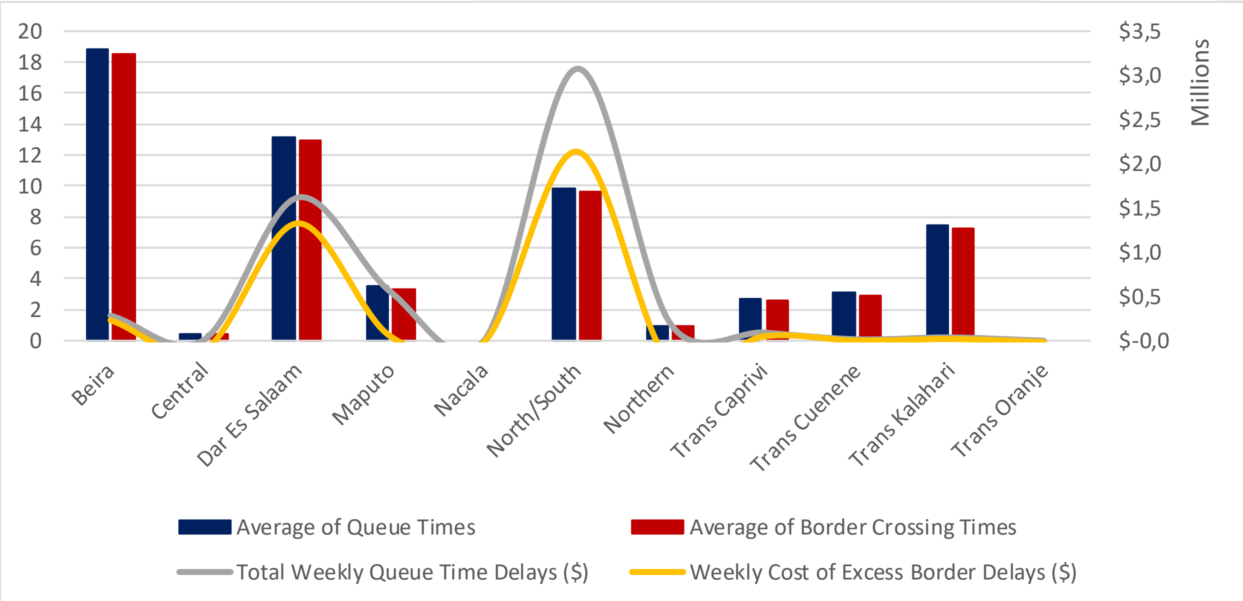
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 13/07/2025.

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

Figure 14 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 13/07/2025.

In summary, cross-border queue time averaged **~5,2 hours** (down by **~0,4 hours** from the previous week's **~5,6 hours**), indirectly costing the transport industry an estimated **$5,9 million** (**R104 million**). Furthermore, the week's average cross-border transit times also hovered around **~5,1 hours** (down by **~0,5 hours** from the **~5,6 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,4 million** (**R60 million**). As a result, the total indirect cost for the week amounts to an estimated **~$9,3 million** (**R164 million**, down by **~R1 million** or **↓1%** from **~R165 million** in the previous report).

4. International Update

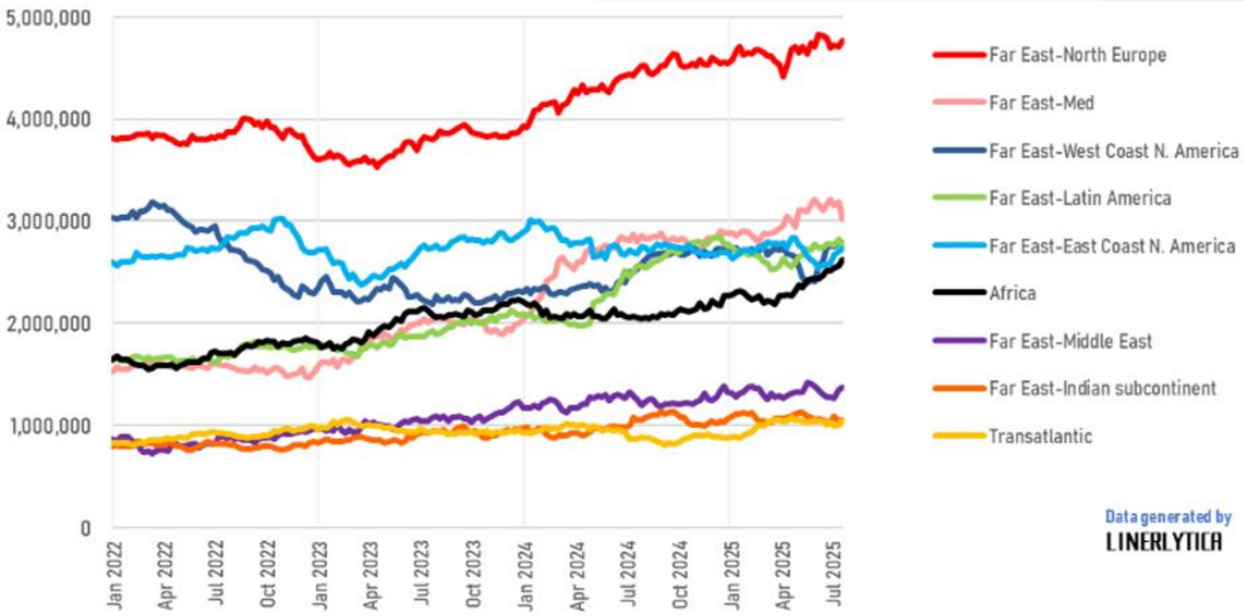
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Global container capacity

Global containership capacity increased by **2,43 million TEU** (**↑8,1%**, y/y) over the past 12 months, driven by **2,48 million TEU** in new vessel deliveries and minimal scrapping (just **50 thousand TEU**). Notably, **African trade routes absorbed 23%** (**~570 000 TEU**) of this net capacity, supported by MSC's deployment of **24 000 TEU vessels** to the Far East–West Africa corridor since March. This redeployment has helped alleviate overcapacity on Asia–Europe and Transpacific services.

Figure 15 – Global capacity by linehaul trade: 2022 to 2025 (total capacity deployment in TEU)



Source: Linerlytica

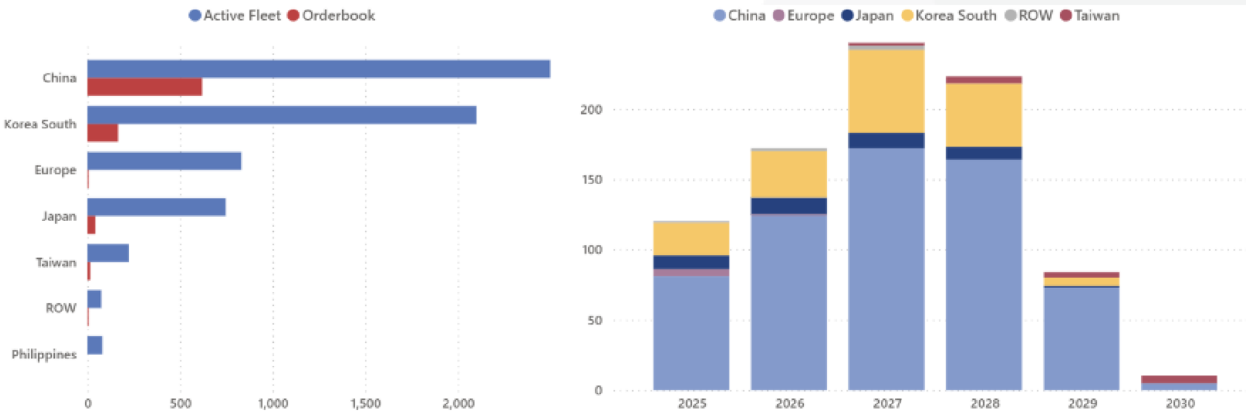
However, On Asia–West Coast South America trade lanes, looming overcapacity has prompted carriers to abandon vessel-sharing alliances in favour of standalone services, as they scramble to protect weakening freight rates amid the glut.[9]

ii. Container shipbuilding

South Korea currently leads the global container shipbuilding industry by capacity, with **50,2%** of the in-service fleet's TEU, but China is rapidly catching up. China now builds more vessels by count (**38,1%** versus Korea's **32%**) and dominates the orderbook, accounting for over **70%** of future ships by both TEU and vessel count. In five years, Korea will still lead slightly in total TEU, but China's surge signals a significant shift in global shipbuilding dominance. China is set to become the industry powerhouse.

[9] Van Marle, G. 17/07/2025. Tradelanes: Overcapacity on Asia-S America Impacting Alliances and Rates.

Figure 16 – Global cellular containership breakdown – (LH) & Current order book by building zone (RH)

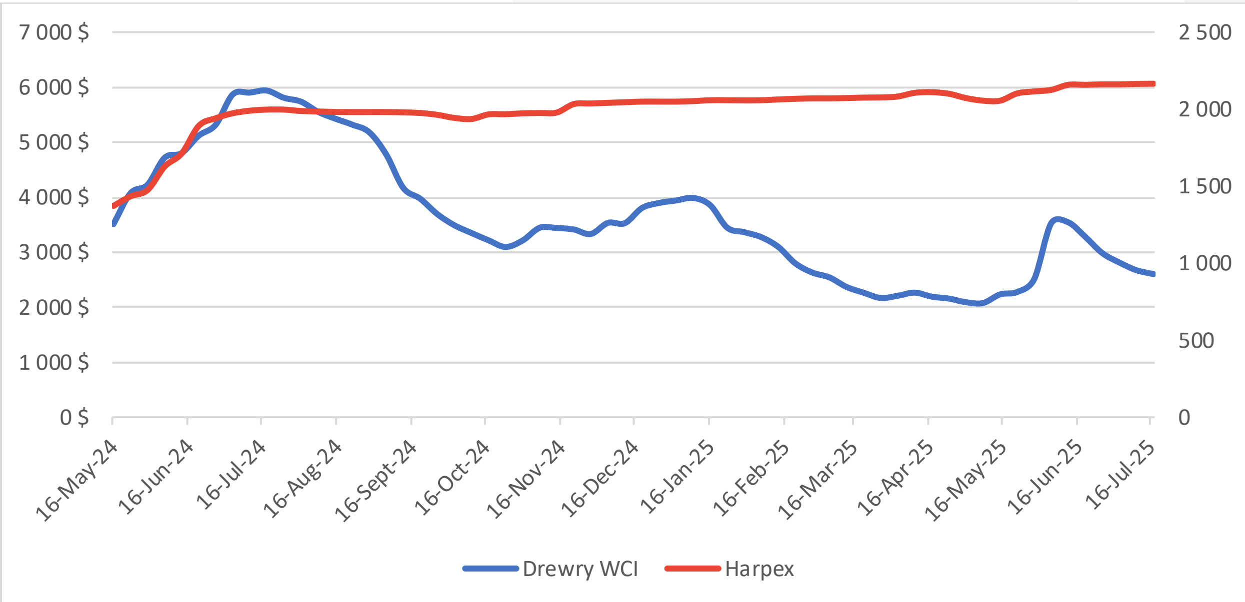


Source: *Alphaliner*

iii. Global freight rates

Global spot rates continue to decline, as Drewry's "*World Container Index*" is down by **↓2,6%** (or **$70**) to **$2 602 per 40-ft container**[10] this week. Meanwhile, the *Harper Petersen Index* (Harpex) traded around **2 165 points** on Friday, as charter rates remained stable, as illustrated:[11]

Figure 17 – World Container Freight Index ($ per 40ft) & Harper Petersen Charter Index



Source: Calculated from *Drewry* *&* *Harpex*

[10] Drewry. 17/07/2025. World Container Index.
[11] Harpex. 18/07/2025. Harper Petersen & Co Charter Rate Index.

Despite the price stability, market chartering activity is beginning to ease as cargo owners adopt a more "patient and selective" stance in anticipation of softer demand – yet available tonnage remains exceptionally scarce, keeping rates elevated.[12]

iv. Further developments of note

The following international developments in trade, transport, and logistics are also worth mentioning:

1. **US trade and tariffs US:**
   a. US inbound container volume dropped **↓7,9%** year-on-year in June (marking the second consecutive monthly decline) and signals a potentially historic trade contraction reminiscent of those seen during the global financial crisis and the pandemic.
   b. According to veteran analyst John McCown, a further **near-25%** decline could slash US trade volume by about **$510 billion annually**, underscoring the adverse economic ramifications of President Trump's trade war.[13]
   c. With another flurry of trade deals signed this week, Americans are now facing an additional **15% tariff** on Japanese imports (such as cars), and roughly 19% on goods from Indonesia and the Philippines, following toughened trade agreements around the world.[14]
2. **Front-loading has made seasonal H2 peak unlikely:**
   a. Demand on major deep-sea and air tradelanes is slowing significantly due to a front-loading frenzy – where shippers have pulled cargo forward into earlier months – making the traditional H2 peak season increasingly unlikely.[15]
   b. Analysts warn that this advance loading has triggered a downturn in demand that is expected to persist through the rest of the year as carriers seek to preserve their freight rates. As a result, capacity management and pricing strategies may need to be recalibrated to adapt to this atypical seasonal pattern.

b. Global air cargo industry

In the high-frequency metrics from World ACD, global air cargo tonnages declined slightly for a second consecutive week, driven primarily by reduced flows from Asia Pacific to the US (notably Southeast Asia). Nonetheless, overall spot rates remained firm, edging up **↑1%** (w/w) to **$2,65/kg**, buoyed by a post-Independence Day rebound from North America. Capacity remained relatively stable, with a **↑1%** increase in the last two weeks.

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[12] Goldstone, C. 21/07/2025. Charter market calming, but open tonnage still rare.
[13] Murray, B. 21/07/2025. US Container Volume Weakened in Reversal Amid Tariff Turmoil.
[14] Lennane, A. 23/07/2025. Tough talk as new trade and tariff deals are agreed around the world.
[15] Goldstone, C. 18/07/2025. Front-loading frenzy has made traditional H2 peak season unlikely.

Figure 18 – Region to region: capacity, chargeable weight, and rates (last two to five weeks, % change)

Origin Regions last 2 to 5 weeks	Capacity[1]			Chargeable weight[1]			Rate[1]		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		+2%	+6%		-2%	+1%		+3%	+10%
Asia Pacific		+2%	+5%		-2%	+7%		+2%	-1%
C. & S. America		-0%	-2%		-4%	+1%		+0%	-1%
Europe		+2%	+2%		-1%	-1%		+2%	+6%
M. East & S. Asia		+4%	+1%		+6%	+1%		+1%	-11%
North America		-1%	-1%		-6%	+2%		-2%	+0%
Worldwide		+1%	+2%		-2%	+3%		+2%	+0%

Source: *World ACD*

Africa showed positive momentum, recording a ↑**6%** increase in tonnages and a ↑**2%** rise in rates over the same period. Meanwhile, the Middle East and South Asia (MESA) region experienced a ↓**3%** drop in tonnages amid renewed geopolitical and customs disruptions. Year-on-year, global rates in USD remain broadly stable, although ↓**6%** lower in euro terms due to currency depreciation.

ENDS[16]

[16] **ACKNOWLEDGEMENT:**

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