Authored by:
www.saaff.org.za

Distributed by:
www.busa.org.za

Cargo Movement Update #258[1]

Date: 2 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)	38 462	43 819	**82 281**	48 433	55 178	**103 611**	↓21%
Air Cargo (tons)	4 818	2 991	**7 809**	4 495	3 535	**8 030**	↓3%

Monthly Snapshot

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

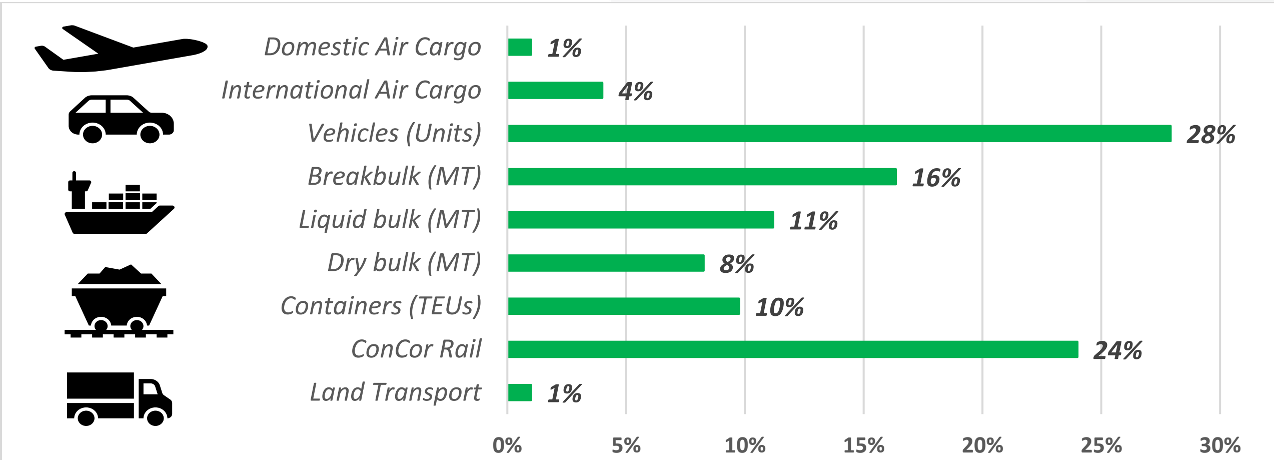
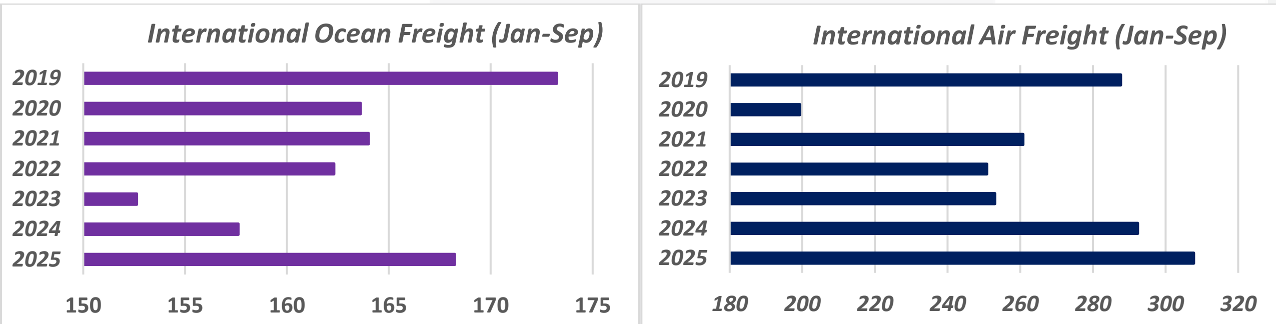


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~11 754 TEUs** was handled per day, with **~11 610 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **4 074** containers, down by **↓2%** from last week.
- Cross-border queue: **↓0,8 hrs**; transit: **↓0,8 hrs**; SA borders: **~10,1 hrs** (**↓8%**); SADC: **~5,0 hrs** (**↓14%**).
- Drewry's latest "*Port Throughput Index*" increased by **↑1,3%** (m/m) in August, and is up by **↑5,1%** (y/y).
- Global rates rose for a third consecutive week and are up by **↑4,4%** (or **$76**) to **$1 822/40ft**.
- Global air cargo demand (CTKs) increased by **↑2,9%** (y/y), maintaining resilience despite a slowdown.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *258th* 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: Sept. vs Sept.
[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 **11 754 TEUs** was handled daily, a decrease from **14 802 TEUs** the previous week.

Port operations were characterised by inclement weather, vacant berths, as well as equipment challenges and shortages. More than 30 operational hours were conceded at the Port of Cape Town this week due to adverse weather, as equipment challenges and poor weather conditions prevented optimal performance in Durban. Vacant berths, agent delays, and inclement weather ensured operational delays at our Eastern Cape Ports, while adverse weather conditions resulted in operational delays at the Port of Richards Bay. The latest reports from TFR suggest that the line between City Deep and Mafikeng was closed once again this week due to the derailed containers still needing to be retrieved. The line is expected to be recommissioned over the weekend. The latest Southern Africa terminal and service update from Maersk for week 45 provides positive reading for our major South African Ports, as most major terminals (CTCT, CTMPT, NCT, and PECT) recorded no waiting times. DCT Pier 1 and Pier 2, however, recorded waiting times between 1 and 3 days.

Global containerised trade showed resilience (up by **↑1,3%** in August and **↑5,1%**, y/y), supported by strong growth in Greater China and South Asia, while Africa also recorded notable gains. However, US container volumes continued to face pressure, with the top ten ports collectively down **↓6,6%** (y/y), reflecting tariff-driven headwinds. On the Cape/Red Sea routing, a limited CMA CGM east-bound return via Suez signals early adjustment, **though carriers remain cautious, as a complete reversion could release nearly 6% of global fleet capacity** and disrupt freight dynamics. Freight rates rose again this week amid firm East China demand, though market analysts caution that easing US-China tensions could soften recent rate momentum. Other developments of note include **(1)** Drewry "*Crude Tanker Equity Index*" has surged approximately **↑51,1%** year-to-date, **(2)** the US and China have agreed to suspend their reciprocal port-call fees on each other's vessels, and **(3)** recent gains in container freight rates are already showing signs of reversal.

The daily average of air cargo handled amounted to **~688 000 kg** inbound (**↑7%**, w/w) and **~427 000 kg** outbound (**↓15%**) – resulting in a slight drop (primarily outbound) in international cargo handled. Nevertheless, the current levels continue to trend slightly above last year's level, as October volumes are **↑2%** (y/y) above last year's.

Air cargo operations this week include: **(1)** improved efficiency at the **BMA**, as the previous backlog of **~4 800 shipments, ~13 days** has been cleared; however, a robust, coordinated process needs to be created as we advance, **(2)** delays in **Foreign Operator Permit** processing affecting both scheduled and charter operations, and **(3)** ongoing uncertainty regarding **ACSA cargo facility leases**. Lastly, the deadline looms for comments on South Africa's Airfreight Strategy, which is due 7 November.[6]

Global air cargo demand continued to expand in September, with industry CTKs up **↑2,9%** year-on-year and international traffic up **↑3,2%**, led by Africa's sustained double-digit growth (**↑14,7%**). Capacity rose by **↑3,0%**, keeping utilisation broadly stable. However, IATA cautions that trade-policy uncertainty and softer goods-market dynamics could temper growth momentum. According to World ACD's late-October data, spot rates increased **↑4%** (w/w), with Asia-Pacific routes driving early peak-season activity. Rates on China–US and Korea–US lanes reached yearly highs (**$5,40** and **$5,73/kg**), while India's volumes dipped amid Diwali

[6] SA Gov News. 03/11/2025. Deadline looms for comments on Airfreight Strategy.

holidays. Year-on-year, global capacity remains up **~↑4%** and rates **~↑5%** higher. In other aviation news, a cargo aircraft crashed in a fiery explosion shortly after take-off from Louisville International Airport in Kentucky. Elsewhere, the latest delay in Boeing's B777-X programme will continue to impact freight capacity over the coming two years.

Cargo movements along the N4 corridor increased slightly for road transport and decreased slightly for rail transport (although reporting has not been comprehensive). Truck volumes through the border post increased to around **1 462 HGVs per day** (**↑4%**, w/w). Queue times were stable at an average of **~5,3 hours** at the border. The average processing time was also stable at an average of **~5,2 hours** per crossing. The rail to Maputo decreased to an average of **eight trains daily** (down by **three** 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 **three-quarters of an hour** from last week, while transit time decreased by the same magnitude. The median border crossing times at South African borders decreased by roughly **an hour**, averaging **~10,1 hrs** (**↓8%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) also decreased by around **three quarters of an hour**, averaging **~5,0 hrs** (**↓14%**). This week, on average, the same two SADC borders took around a day to cross, namely Beitbridge and Kasumbalesa (the worst affected – albeit slightly reduced this week, taking nearly **two and a quarter days** from the **Zambian side**). Other developments of note include **(1)** ongoing congestion at Beitbridge linked to ZIMRA's 100% scanning requirement and associated cargo theft incidents, **(2)** temporary suspension of northbound movements at Nakonde due to political unrest in Tanzania, and **(3)** a build-up of traffic at Sakania following peak-season volumes and a recent fire-related disruption.

As we look ahead, sustaining a growth trajectory will depend on the pace and coherence of our domestic reform agenda, particularly in restoring operational stability across ports, rail, border management, and regulatory systems. Encouraging progress is evident: the recent clearance of the backlog at BMA and improved coordination with Port Health demonstrate that targeted interventions can yield rapid results. However, these gains must now be institutionalised through predictable, resilient, and digitally enabled processes to prevent recurrence and improve trade facilitation on a lasting basis. South Africa's ability to break from prolonged economic stagnation will increasingly hinge on the efficiency and reliability of its trade, transport, and logistics systems, with the container and shipping industry navigating ongoing global uncertainty.

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 27 October to 2 November (measured in TEUs)

7-day flow reported (27/10/2025 – 02/11/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 147	36 029	↓13%
New Pier (Pier 1)	2 332	16 322	↓4%
Cape Town Container Terminal	1 836	12 854	↓35%
Ngqura Container Terminal	1 725	12 075	↓38%
Port Elizabeth Container Terminal	94	660	↑33%
Other	620	4 341	↓17%
Total	**11 754**	**82 281**	**↓21%**

Source: Calculated from TPT, 2025. Updated 02/11/2025.

A substantially decreased average of **~11 754 TEUs** (**↓21%**) was handled per day for the last week (*27 October to 2 November, Table 2*). Throughput was consequently above the projected average of **~11 610 TEUs** (**↑1%** actual versus projected).

For the coming week, a decreased average of **~11 610 TEUs** (**↓1%**) is predicted to be handled (*3 to 9 November*, *Table 3*).

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

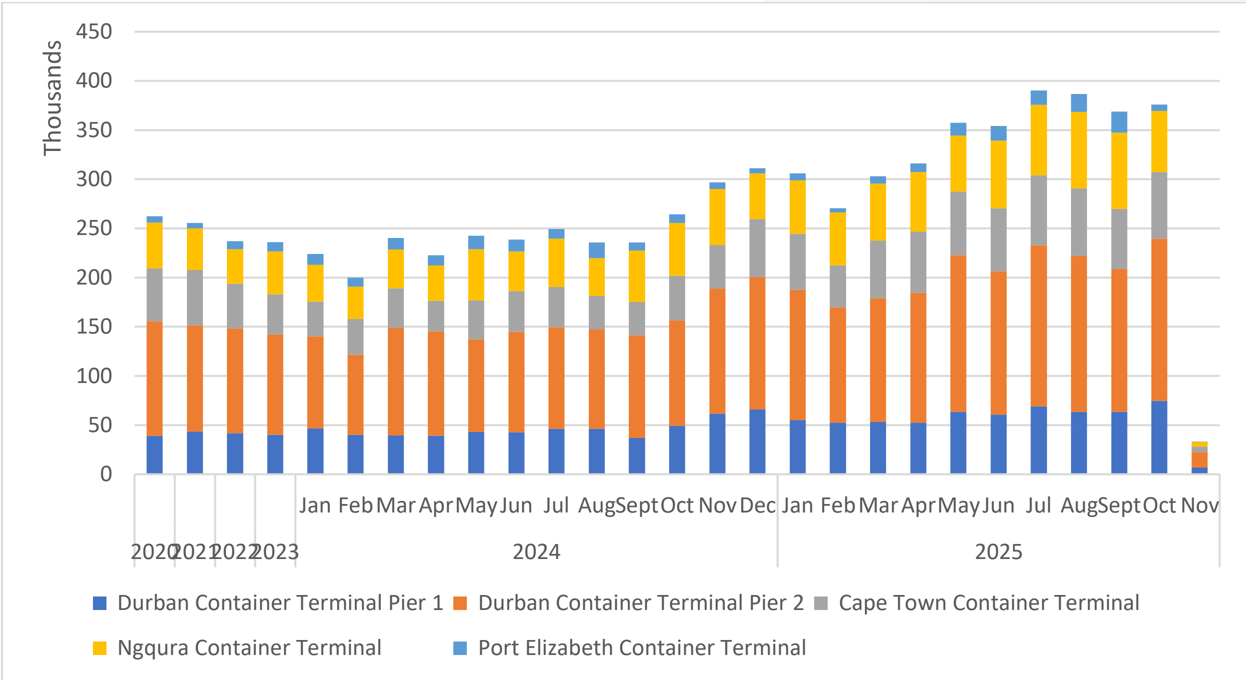
Table 3 – Container Ports – Weekly flow projected for 3 to 9 November (measured in TEUs)

7-day flow projected (03/11/2025 – 09/11/2025)			
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%
Total	**11 610**	**81 269**	**↓22%**

Source: Calculated from TPT, 2025. Updated 02/11/2025.

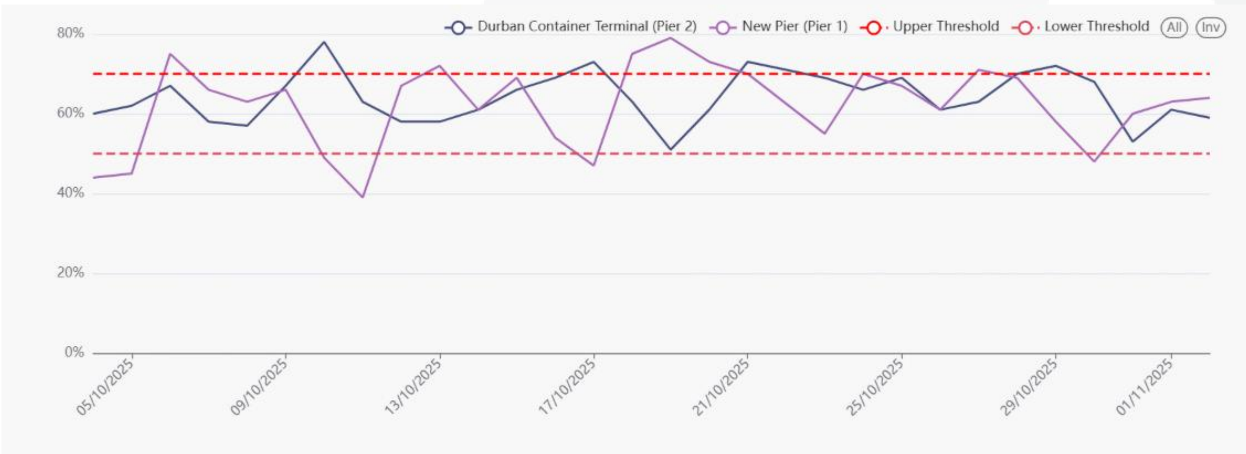
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2025, and updated 02/11/2025.

Figure 4 – Stack occupancy in DCT, general-purpose containers (5 October to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 02/11/2025.

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 (5 October to present, day on day)

Source: Calculated using data from Transnet, 2025, and updated 02/11/2025.

b. Summary of port operations

i. Weather and other delays

- More than 30 operational hours were lost at the Port of Cape Town due to adverse weather.
- Equipment challenges and poor weather conditions prevented optimal performance in Durban.
- Vacant berths, agent delays, and weather resulted in some operational delays in the Eastern Cape.
- Lastly, some adverse weather also impacted operations at the Port of Richards Bay.

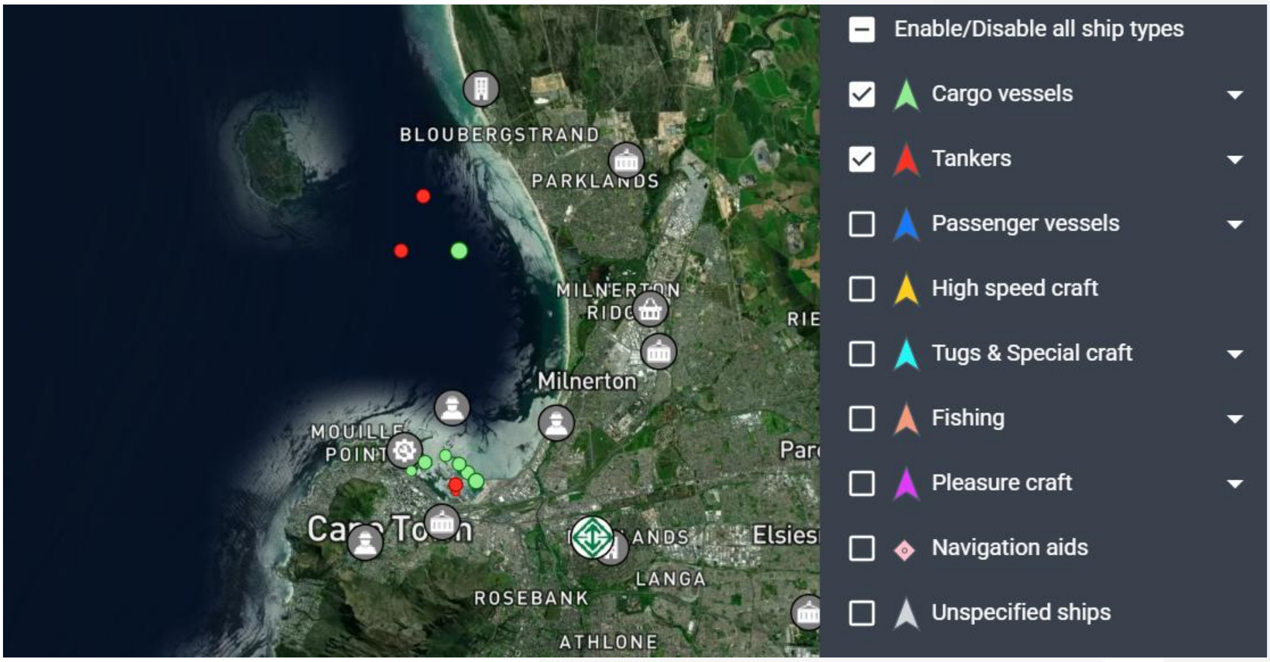
ii. Cape Town

On Thursday, CTCT recorded two vessels at berth and one at anchor, as strong winds and equipment challenges proved to be the primary operational constraints at the port. To contextualise this, the terminal conceded over 30 operational hours to adverse weather towards the end of the week. On the landside, between Monday and Thursday, the terminal managed to service at least 2 937 trucks while handling approximately 261 rail units. On the waterside, the terminal executed approximately 2 533 container moves across the quay during the same period. Additionally, this week, the terminal operated with **eight STS cranes**, **25 RTGs**, and approximately **59 hauliers**. Crane LC1 remained out of commission for the most significant part of the week in an attempt to improve its reliability. No ETR has been communicated yet.

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 (wheat vessel) is scheduled for arrival around 7 November, with the next container vessel expected to arrive around 15 November.

Between 20 and 26 October, the FPT terminal handled four vessels: one multi-cargo and three layby vessels. Berth occupancy during this period was recorded at 66%. The terminal planned to hold six more vessels between 27 October and 2 November, with another five vessels scheduled between 3 and 9 November. The late arrival of transporters and adverse weather resulted in operational delays during this period.

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



Source: Marine Traffic. Updated 02/11/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded one vessel on berth, with zero vessels at anchor. Between Monday and Thursday, the terminal executed at least 4 710 gate moves and 65 rail moves on the landside. The **average TTT** for the week was **~87 minutes** (**no change**, w/w), and the average **staging time** was **~58 minutes** (**↑5%**). Additionally, the terminal moved over 6 800 TEUs across the quay on the waterside during the same period. The terminal had **five** (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 **71%** for the week, with RTG availability roughly sitting at **54%**.

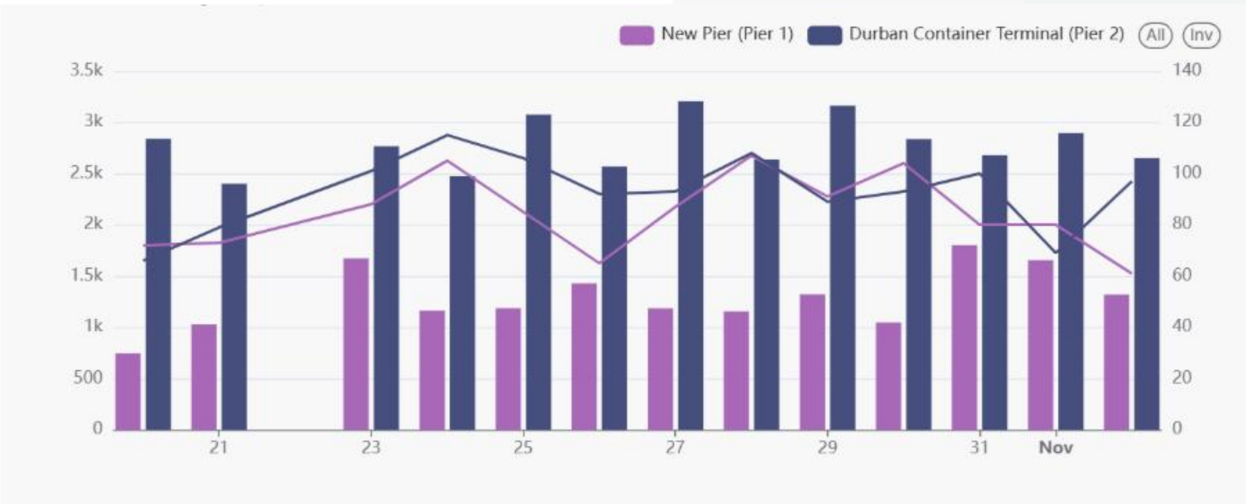
Pier 2 had four vessels on berth and three at anchorage on Thursday, as equipment breakdowns and adverse weather prevented optimal operational performance this week. The terminal operated with **9** to **12 gangs** and moved over **14 200** containers across the quay between Monday and Thursday on the waterside. Approximately **11 838** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~87 minutes** (**no change**, w/w), and an average **staging time** of **~115 minutes** (**↓5%**). Approximately 1 948 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **61** and **67** 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 two at outer anchorage. Stack occupancy for containers was recorded at 25% and the breakbulk stack at 15%. In the preceding 24 hours, 503 containers and zero tons of breakbulk were handled on the waterside. On the landside, 339 container trucks were serviced at a TTT of ~22 minutes. Additionally, one breakbulk truck was serviced, containing approximately 23 tons. During this period, two cranes, ten reach stackers, eight forklifts, and 22 ERFs were in operation. The latest reports suggest that the third crane went out of commission earlier this week for a wire rope replacement and is expected back in service by early next week. Additionally, the fourth crane is still on track to return to service towards the end of December.

On Thursday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with four at anchorage. In the preceding 24 hours, the terminal handled 2 996 road units and 144 units on rail on the landside, while 2 243 units were handled on the waterside. Overall stack occupancy was recorded at 59%, with 60% recorded at Q+R and 60% at G-berth. The terminal had 155 abnormal loads and managed to handle 13.

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 02/11/2025.

The queue of container vessels waiting outside Durban has remained stable this week. On Monday evening (3 November), **two** container vessels were waiting outside at anchorage for Pier 1, **three** for Pier 2, and **none** for Point. The queue of dry (**three**), liquid (**nine**), and breakbulk (**three**) vessels has increased slightly from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)

Source: Marine Traffic. Updated 02/11/2025 at 14:00.

iv. Richards Bay

On Monday (3 November), the Port of Richards Bay had 11 vessels at anchor and 15 on the berth, translating to six vessels at DBT, three 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. Adverse weather conditions proved to be the primary operational constraint at the port this week.

The daily average coal throughput for the week increased and averaged around **163 000 tons** (**↑7%**, w/w) a day. An average of **26 trains** was serviced on the landside (up by **one** from last week), and slightly above the target of 22.

v. Eastern Cape ports

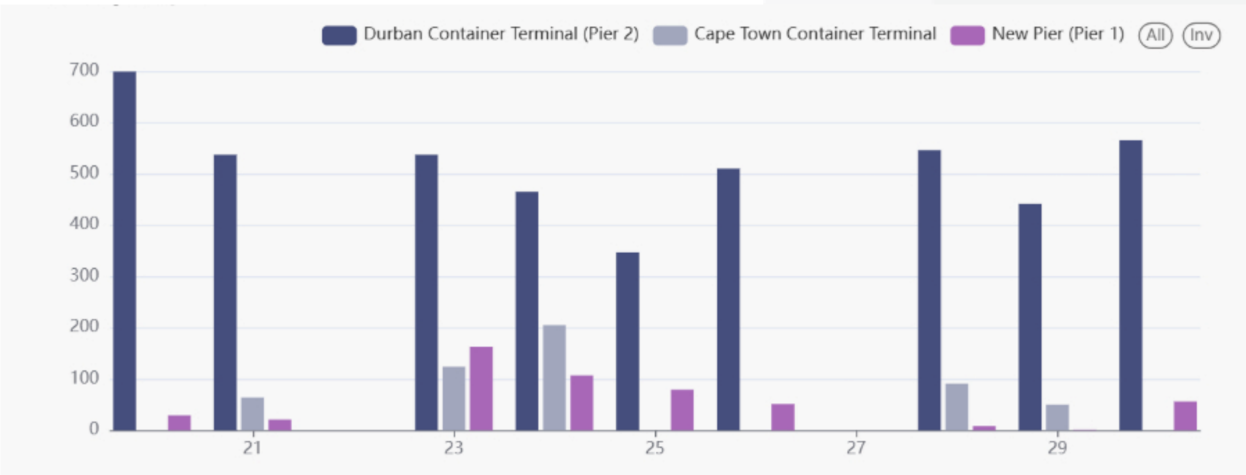
On Thursday, NCT recorded three vessels on berth and two at anchor, with two vessels drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. For the majority of the week, the Ports of PE and Coega shared a pilot boat due to some challenges with their waterside equipment. Stack occupancy figures were recorded at 14% for reefers and 18% 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 2 866 TEUs and 53 reefers on the waterside. Approximately 758 trucks were processed on the landside at a TTT of ~28 minutes. For the most significant part of the week, the terminal had between seven STS cranes, between 21-23 RTGs, and around 50-51 hauliers in service.

On Thursday, GCT had zero vessels at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 73 trucks were processed at a TTT of ~28 minutes on the landside, while 273 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 16% for the general stack and 8% for reefers. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and eight straddles in service.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that the line between City Deep and Mafikeng was closed once again this week due to the derailed containers still needing to be retrieved. The line is expected to be recommissioned over the weekend. Additionally, towards the end of the week, DCT Pier 2 had 500 ConCor units on hand with a dwell time of 72 hours and 370 over-border units with a dwell time of 82 days.

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



Source: Calculated using data from Transnet, 2024. Updated 02/11/2025.

In the last week (*27 October to 2 November*), rail cargo on the ConCor line out of Durban was reported at **4 074** containers, down by **↓2%** from the previous week's **4 171** containers.

vii. General

The latest Southern Africa terminal and service update from Maersk for week 45 provides positive reading for our major South African Ports, as most major terminals (CTCT, CTMPT, NCT, and PECT) recorded no waiting times. DCT Pier 1 and Pier 2, however, recorded waiting times between 1 and 3 days. Conversely, the picture looks slightly dimmer for our immediate neighbouring counterparts, with Port Reunion recording 3-4 days' waiting time, Walvis Bay (Namibia) recording two days' waiting time, and Beira (Mozambique) recording 11 days' waiting time.

viii. Tanzania political unrest: Impact on Dar es Salaam & Mozambican ports

Political unrest in Tanzania since last week has led to widespread curfews and port disruptions in Dar es Salaam, prompting multiple vessel diversions to Mombasa. Satellite and congestion data illustrate the shift clearly. As of 3 November, Dar es Salaam recorded **12 container ships** (and a total of 35) **at anchorage**, only **four alongside**, and a **queue-to-berth** ratio of **3,0**, with approximately **35 900 TEU** awaiting discharge. The anchorage map confirms heavy clustering of vessels (marked in red and green) offshore, reflecting restricted berthing and possible port closures.[7]

By contrast, Mombasa showed a significant congestion build-up: **13 container ships** at anchorage, **seven alongside**, and **41 783 TEU** waiting offshore, yielding a **queue-to-berth** ratio of **1,73**. The port's satellite image shows dense berthing activity within Kilindini Harbour, underscoring its role as a regional contingency hub. Collectively, the pictures and supporting reports confirm that the Dar es Salaam disruptions have diverted regional cargo flows toward Mombasa, temporarily overloading Kenya's main gateway. At the same time, Tanzania's port operates under constrained conditions. Fortunately, reports indicate that the situation has improved by mid-week.

[7] Whiteman, A. 04/11/2025. Bad weather adds to political turmoil and cargo chaos at East African ports.

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 (*27 October to 2 November*). 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

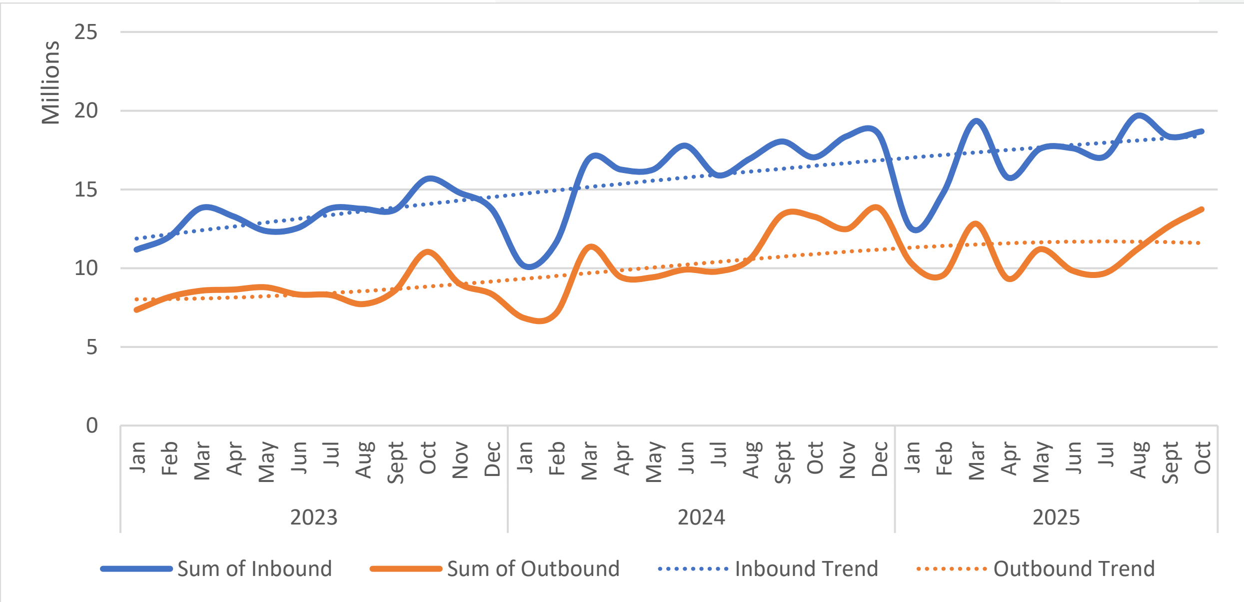
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	688 271	4 817 894	↑7%
Volume outbound	427 230	2 990 609	↓15%
Total	1 115 500	7 808 503	↓3%

Courtesy of ACOC. Updated: 02/11/2025.

International air cargo lifted to and from ORTIA amounted to **~688 000 kg** inbound (**↑7%**, w/w) and **~427 000 kg** outbound (**↓15%**) – resulting in a slight drop (primarily outbound) in international cargo handled. Nevertheless, the current levels continue to trend slightly above last year's level, as October volumes are **↑2%** (y/y) above last year's.

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

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

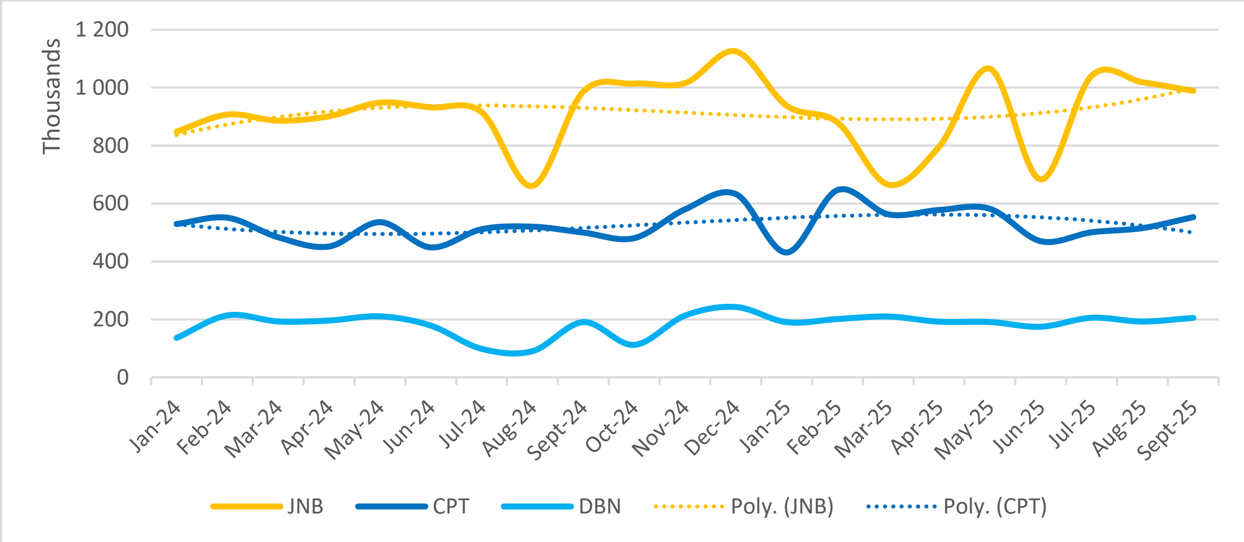


Calculated from ACOC. Updated: 02/11/2025.

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: 02/11/2025.

c. Air cargo operations

The following summary captures the latest air cargo operations in the last month, including the latest BMA delays:

1. **Air cargo operations - summary:**
    a. **Strong recent volumes:** export berries/perishables to Asia/Middle East/EU; imports supported by Rand stability.
    b. **E-commerce charters (4–6 weekly)** continue despite the China shipment tax, sustaining inbound flows.
    c. **ACSA Warehousing:** Cargo handlers still on month-to-month leases; new backdated invoices issued; risk of operational disruption if the situation is not resolved.
    d. **Foreign Operator Permits (FOP):** Scheduled and charter processes need streamlined timelines; current manual workflows cause significant delays.
2. **OR Tambo BMA backlog:**
    a. The backlog at OR Tambo has now been cleared, following the coordinated industry–BMA effort over the weekend. This is a positive outcome and demonstrates what can be achieved with focused resourcing and active collaboration.
    b. However, to prevent recurrence, the clearance process requires a more robust, predictable, and digitally enabled operating structure. Air cargo consignments are time-sensitive by definition, and clearances should consistently be completed within **12 hours** (and at most **within 24 hours**) to maintain supply-chain reliability.
    c. In the interim, the industry will continue to bear the cost of additional weekend capacity (estimated at **~R700 000** through to March 2026). A formal performance monitoring mechanism – with a transparent single source of throughput data – is required to ensure the efficiency and accountability of these interventions as we advance.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*27 October to 2 November)*, movements along the N4 corridor increased slightly for road transport and decreased somewhat for rail transport (although reporting has not been comprehensive).

- Truck volumes through the border post increased to around **1 462 HGVs per day** (**↑4%**, w/w).
- Queue times were stable at an average of **~5,3 hours** at the border.
- The average processing time was also stable at an average of **~5,2 hours** per crossing.
- The rail to Maputo decreased to an average of **eight trains daily** (down by **three** 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
Design Capacity	**1 500**	**1 500**	**1 200**	**200**	**n/a**	**50**	**50**	**2 000**	**20**	**10**	**6**	**4**
Average	1 462	1 415	1 061	229	38	91	35	287	6	8	1	1
% (w/w)	**4%**	**4%**	**2%**	**3%**	**26%**	**8%**	**-10%**	**9%**	**-100%**	**-8%**	**0%**	**-33%**
% of design capacity	106%	92%	96%	126%	n/a	179%	99%	15%	50%	94%	43%	36%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 02/11/2025.

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 02/11/2025 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 decreased by approximately **three-quarters of an hour** from last week, while transit time decreased by the same magnitude.
- The median border crossing times at South African borders decreased by approximately **an hour**, averaging **~10,1 hrs** (**↓8%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) also decreased by around **three quarters of an hour**, averaging **~5,0 hrs** (**↓14%**).

1. **Beitbridge:**
   a. Severe congestion persists within the yard, attributed to ZIMRA's *100% scanning mandate*.
   b. Zimborders has been engaging ZIMRA hourly to manage traffic flow, yet some drivers report immobility since early morning hours.
   c. Rising incidents of *cargo theft through cut Tautliner curtains* have been noted; FESARTA has urged that all such cases be formally reported when alerting the authorities.
2. **Nakonde:**
   a. The border was *temporarily closed for northbound traffic* on Thursday due to *political unrest in Tanzania*.
   b. Limited movement was permitted for southbound trucks, but northbound operations were halted.
3. **Sakania:**
   c. A *9 km queue* developed over the past week, reportedly due to *peak season traffic* and a *fire-related disruption* the previous day.
   d. Zambian authorities assured FESARTA that normal operations would resume and congestion would be cleared by Saturday.

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

Table 6 – Delays[8] summary – South African borders[9] (both directions)

Border Post	Direction	HGV[10] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	560	24,8	6,1	25,0	16 800	3 920
Beitbridge	Zimbabwe-SA	519	13,7	2,6	13,4	15 570	3 633
Groblersbrug	SA-Botswana	229	18,1	1,2	18,1	6 870	1 603
Martin's Drift	Botswana-SA	215	2,8	0,4	2,5	6 450	1 505
Kopfontein	SA-Botswana	196	14,7	2,2	14,4	5 880	1 372
Tlokweng	Botswana-SA	31	0,6	0,2	0,4	930	217
Vioolsdrift	SA-Namibia	30	3,9	1,2	3,6	900	210
Noordoewer	Namibia-SA	20	2,1	0,5	2,0	600	140
Nakop	SA-Namibia	30	3,5	0,4	3,3	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,4	1,0	600	140
Skilpadshek	SA-Botswana	303	7,7	2,2	7,4	9 090	2 121
Pioneer Gate	Botswana-SA	66	1,8	0,0	0,0	1 980	462
Ramatlhabama	SA-Botswana	212	4,1	0,4	4,0	1 920	448
Ramatlhabama	Botswana-SA	64	0,4	0,1	0,3	6 360	1 484

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

Border Post	Direction	HGV[10] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Lebombo	SA-Mozambique	1 401	5,3	2,0	5,2	42 030	9 807
Ressano Garcia	Mozambique-SA	1 337	2,2	0,3	2,1	40 110	9 359
Sum/Average		**5 233**	**6,7**	**1,3**	**6,4**	**156 990**	**36 631**

Source: TLC, FESARTA, & Crickmay, week ending 26/10/2025.

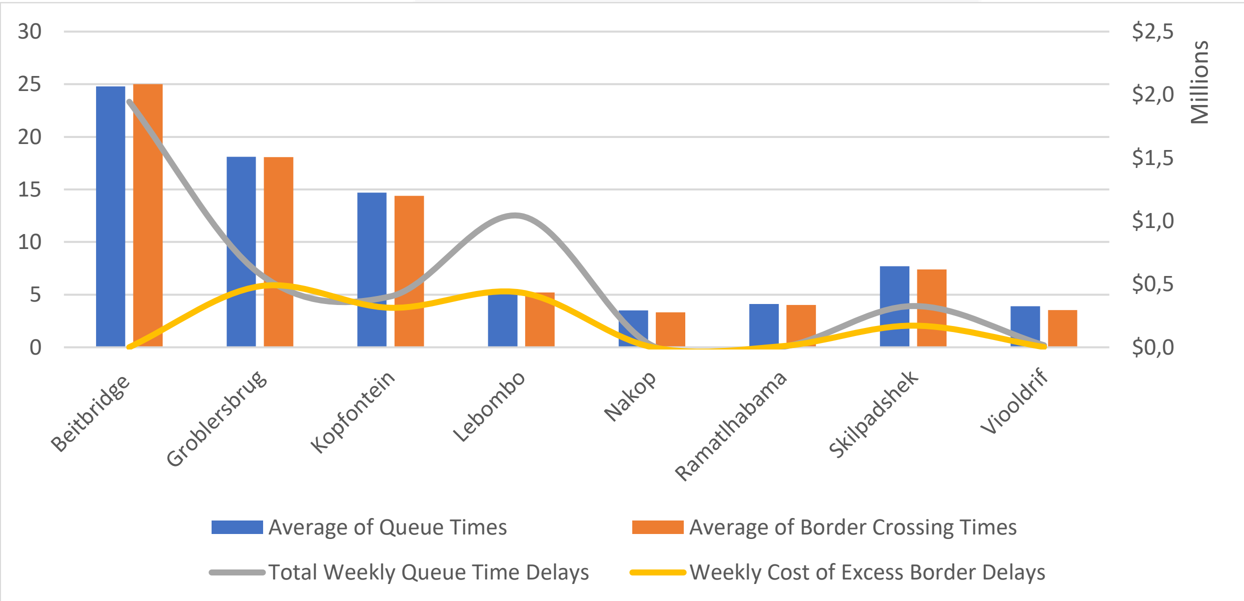
Table 7 – Delays summary – Corridor perspective

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	12,8	3,4	12,7	9 600	2 240
Central Corridor	798	0,3	0,0	0,3	23 940	5 586
Dar Es Salaam Corridor	1 819	13,3	2,6	13,2	54 570	12 733
Maputo Corridor	2 738	3,8	1,2	3,7	82 140	19 166
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 480	11,8	2,2	11,8	104 400	24 360
Northern Corridor	2 817	2,0	0,2	1,9	92 520	21 588
Trans Caprivi Corridor	902	4,2	0,7	3,8	27 060	6 314
Trans Cunene Corridor	100	2,7	0,6	2,5	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700
Trans Oranje Corridor	116	9,6	1,2	9,4	3 480	812
Sum/Average	**13 317**	**5,7**	**1,1**	**5,5**	**407 520**	**95 088**

Source: TLC, FESARTA, & Crickmay, week ending 26/10/2025.

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

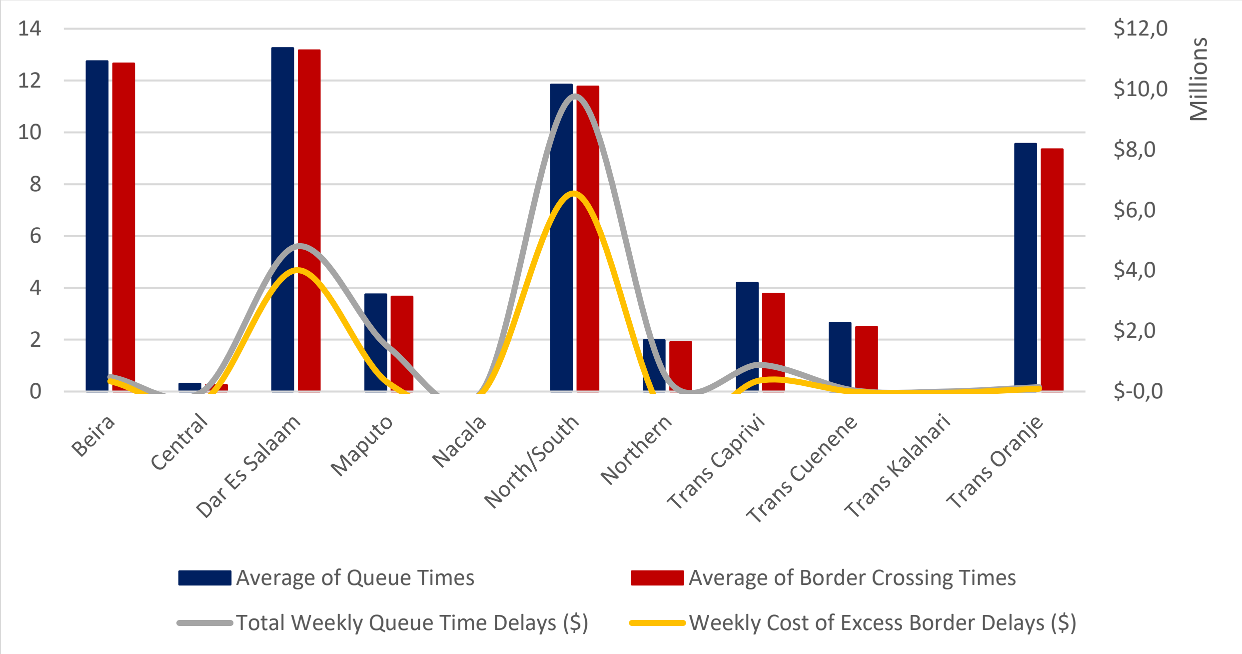
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 26/10/2025.

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 26/10/2025.

In summary, cross-border queue time averaged **~5,7 hours** (down by **~0,8 hours** from the previous week's **~6,5 hours**), indirectly costing the transport industry an estimated **$18 million** (**R310 million**). Furthermore, the week's average cross-border transit times also hovered around **~5,5 hours** (down by **~0,8 hours** from the **~6,4 hours** recorded in the previous report), at an indirect cost to the transport industry of **$10,3 million** (**R178 million**). The total indirect cost for the week amounts to an estimated **~$28,3 million** (**R488 million**, down by **↓16%** from the **~R582 million** in the previous report).

4. International Update

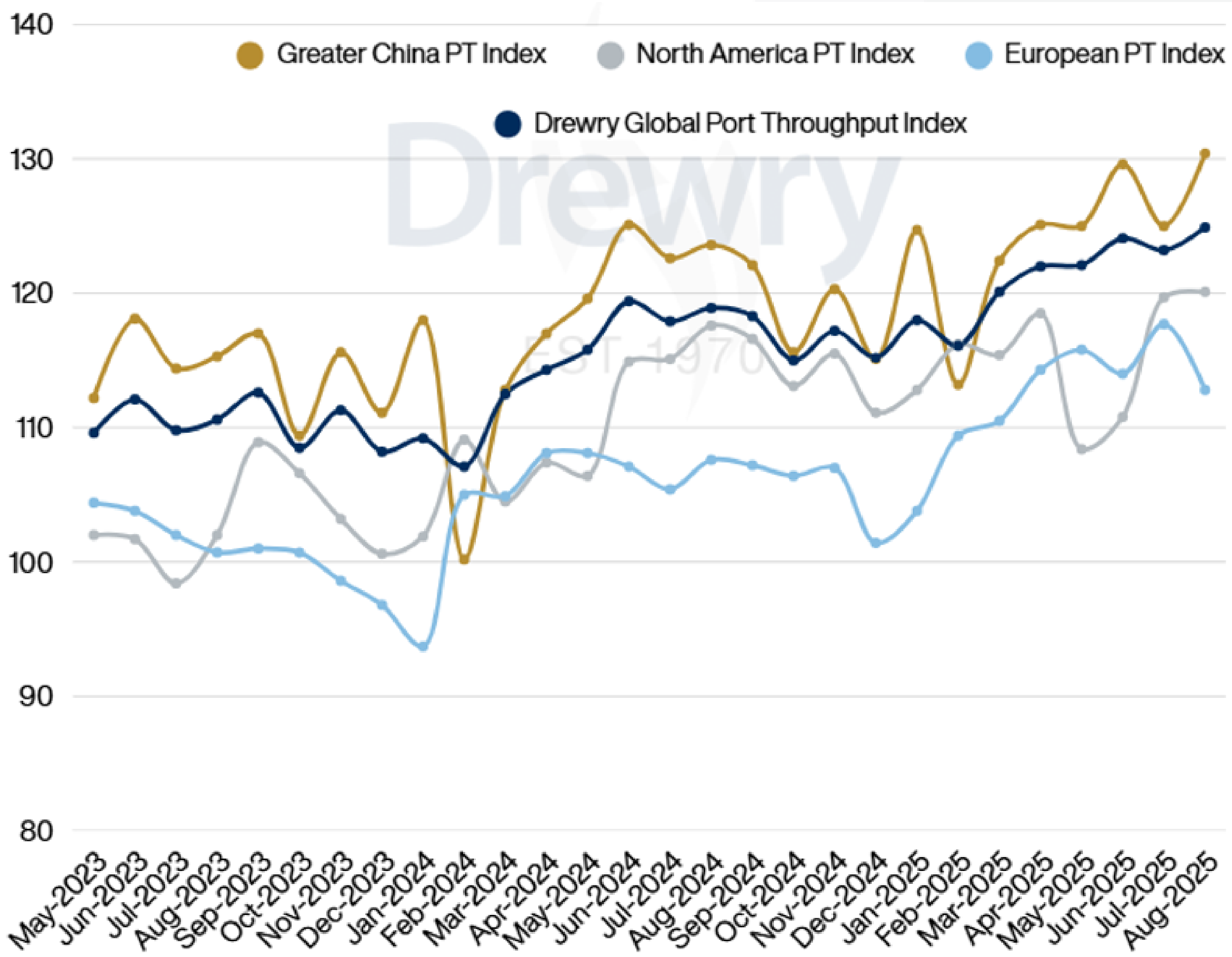
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry, and **(b)** the global aviation industry.

a. Global shipping industry

i. Port throughput index

Drewry's latest "*Port Throughput Index*" increased by **↑1,3%** (m/m) in August, and is up by **↑5,1%** (y/y). Despite widespread uncertainties, global containerised trade remains robust, as the Great China index is up by **↑4,3%** (m/m), and the Middle East & South Asia index is up by **↑5,5%** (m/m). Africa saw an increase of **↑1,7%** (m/m) and **↑8,0%** (y/y).

Figure 15 – Port Throughput Index (January 2019 = 100)



Source: Drewry

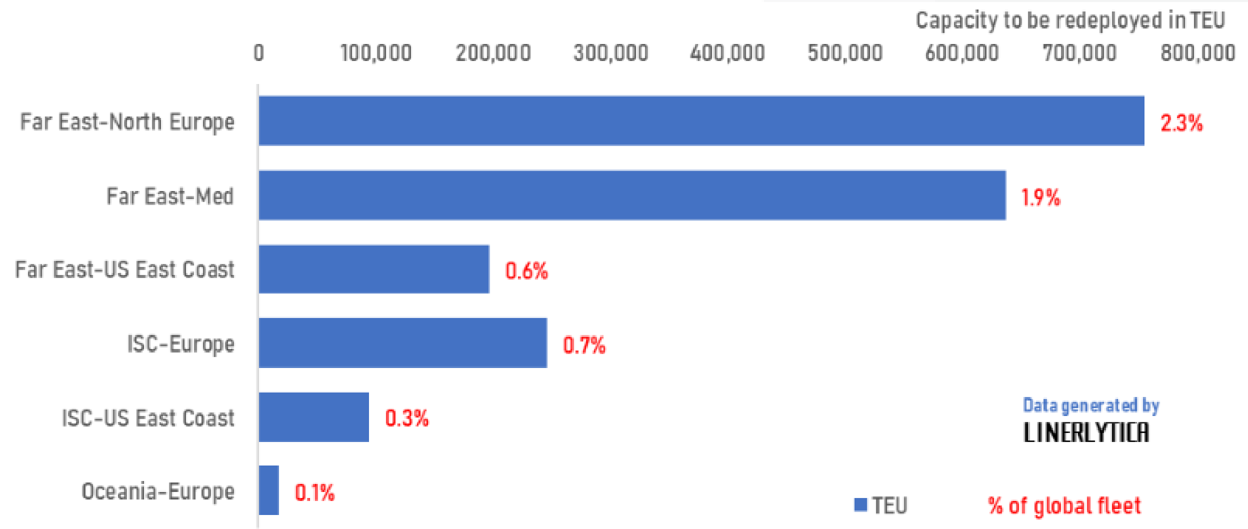
We are expecting the updated CTS figures for September in the coming days, which should offer clearer confirmation of underlying demand strength, even as many market participants had anticipated a comparatively muted peak season. In the US, however, fresh evidence of the damage wrought on US container volumes by the tariffs has emerged, with the top 10 largest ports showing a collective decline of **↓6,6%** year-on-year in September, according to liner firm Blue Alpha Capital.[11]

ii. Cape / Red Sea route developments

According to Linerlytica, the recently redeployed east-bound sailing by CMA CGM on the Suez-Red Sea Route marks a first tentative return from the Cape diversion strategy.[12] However, carriers remain cautious — no west-bound north Europe boxes have been rerouted via Suez yet, and a complete shift back would free up an estimated **1,95 million TEU** (**~5,9% of the global fleet**) and risk severe disruption.

[11] Van Marle, G. 28/10/2025. Volume carnage at USA ports from tariff turmoil will lead to declines.
[12] Whiteman, A. 30/10/2025. Red Sea comeback for liners unlikely before 2027.

Figure 16 – Excess capacity expected from return to Suez route (November 2025)



Source: Linerlytica

In short, we are doubtful to see a significant shift yet. However, while the Cape route remains dominant, the incremental east-bound redeployment via Suez highlights the cautious recalibration of trade flows in response to safety and operational risks in the Red Sea.

iii. Shipping industry summary

The Drewry "*Crude Tanker Equity Index*" has surged approximately **↑51,1%** year-to-date as of 30 October, significantly outperforming major benchmarks. The rally is underpinned by strong VLCC charter rates and tightening crude tanker utilisation, yet Drewry questions the sustainability of this momentum amid rising asset values and evolving supply-side pressures.[13]

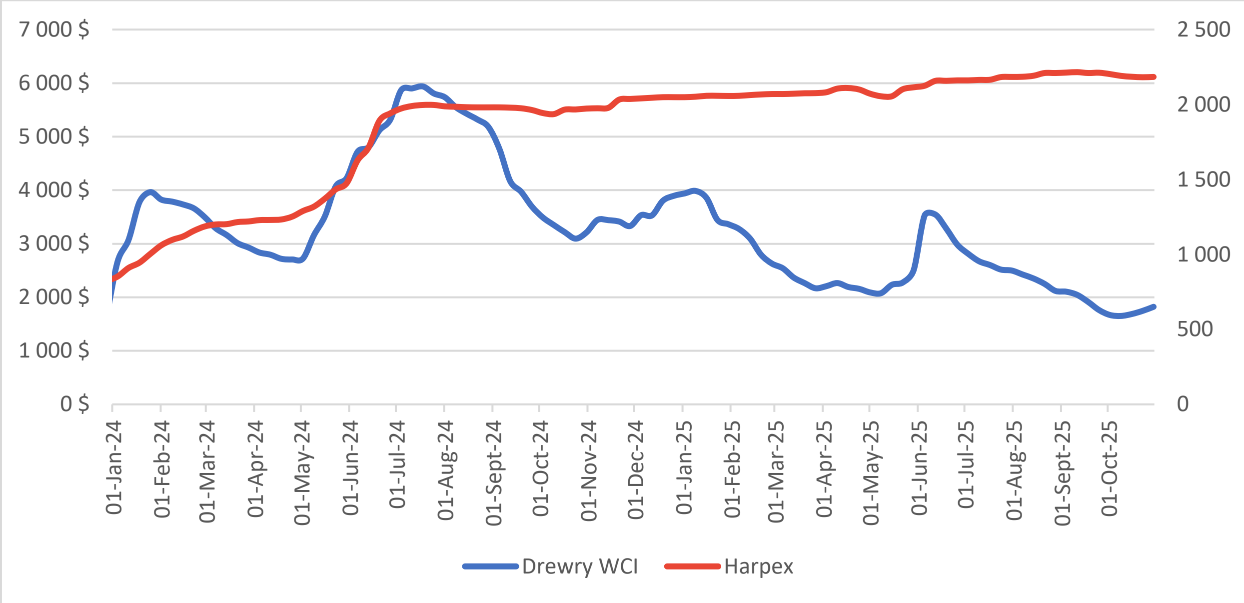
The United States and China have agreed to suspend their reciprocal port-call fees on each other's vessels for a period of 12 months, providing temporary relief to the shipping industry amid broader trade-tension de-escalation.[14]

iv. Global freight rates

According to Drewry's latest "*World Container Index*", freight rates rose for the third consecutive week and are up by **↑4,4%** (or **$76**) to **$1 822 per 40-ft container** this week.[15] The main drivers continue to be out of the East China, as rates out of Shanghai have all risen by between **3 and 5%**. For charter rates, the *Harper Petersen Index* (Harpex) was stable last week and was trading around **2 184 points** on Friday, which is still some **↑11%** above the previous year's level.[16] The following illustrates the diversion which occurred around the middle of August last year and has continued to drive the gap between spot and charter rates:

[13] Drewry. 31/10/2025. Will crude tanker stocks continue their upwards momentum?.
[14] Magli, D. 03/11/2025. US, China agree one-year suspension of port fees.
[15] Drewry. 30/10/2025. World Container Index.
[16] Harpex. 31/10/2025. Harper Petersen Index.

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



Source: Calculated from Drewry & Harpex

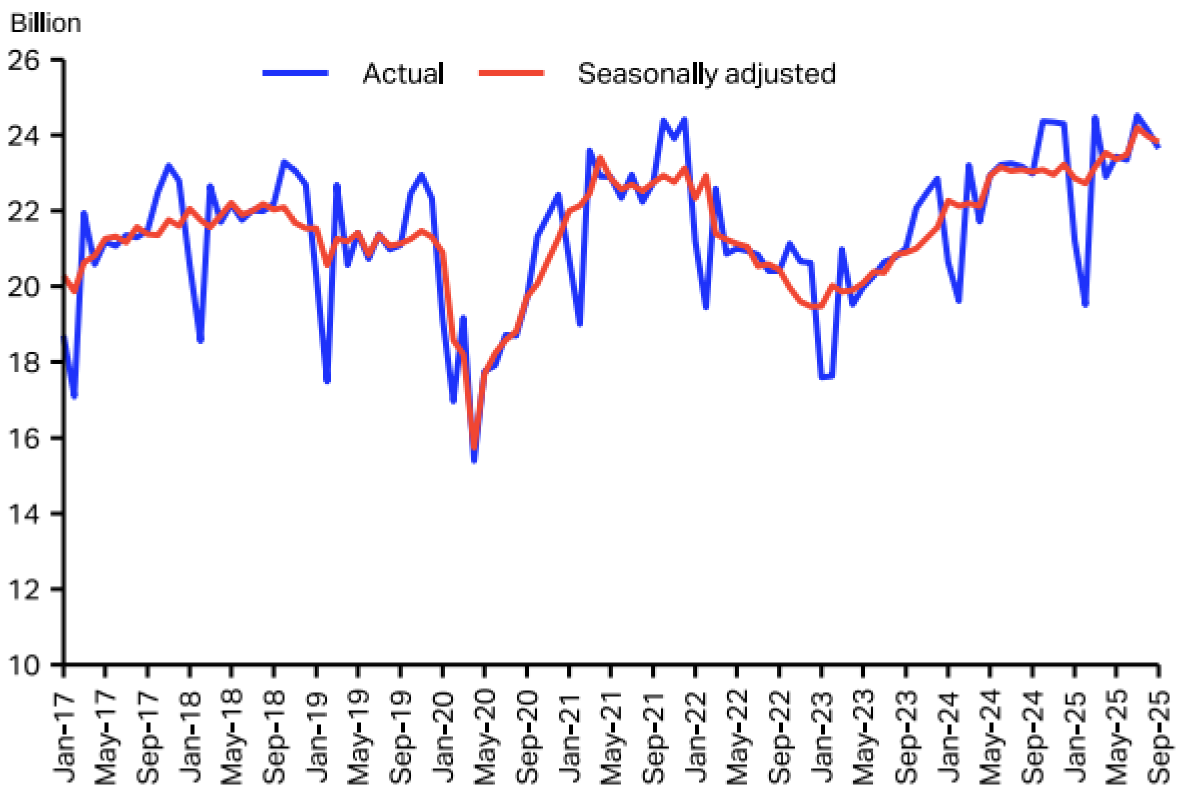
According to Linerlytica, recent gains in container freight rates are already showing signs of reversal with shipments to North Europe and the US East Coast coming under pressure, even as rates to the US West Coast remain firm. The consultancy warns that the recent easing of US-China trade tensions may undermine carriers' efforts at rate restoration, given more stable conditions and reduced capacity disruption.[17] Market sentiments have echoed these developments, as significant trade uncertainty still lingers.[18]

b. Global air cargo industry

The latest IATA "*Air Cargo Market Analysis*" for September showed that the air cargo market sustained growth amid signs of a slowdown. The industry's air cargo demand (measured in Cargo Tonne-Kilometres – CTKs) increased by **↑2,9%** (y/y), maintaining resilience despite a downturn in trajectory following August's **↑4,1%**. International CTKs increased **↑3,2%**, with Africa again leading international growth at **↑14,7%** – its third consecutive month of double-digit growth. Capacity expanded by **↑3,0%**, with the cargo load factor (CLF – a utilisation metric) remaining steady.

[17] Linerlytica. 03/11/2025. Market Pulse – Week 44.
[18] Van Marle, G. 31/10/2025. Mixed messaged for ocean shippers as box rate hikes loom.

Figure 18 – Industry CTKs, billion



Source: [IATA]

Looking ahead, IATA notes that trade-policy headwinds and softer goods-market dynamics are likely to weigh on air-cargo momentum in the coming months.

According to high-frequency metrics from World ACD, global air cargo spot rates rose by **↑4%** (w/w) in late October, signalling early peak-season pressure despite Diwali-related tonnage drops from India (**↓30%** WoW). Demand remained strongest out of Asia Pacific, where spot rates to the US climbed **↑8%**% WoW and to Europe **↑2%**, driven by pre-holiday shipments for *Thanksgiving*, *Black Friday*, and *Christmas*.

Figure 19 – 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		+0%	+12%		+4%	+1%		-1%	-0%
Asia Pacific		+5%	+6%		+10%	+9%		+2%	-6%
C. & S. America		+3%	+8%		+4%	+3%		+1%	-4%
Europe		+1%	+6%		+3%	-0%		+1%	+2%
M. East & S. Asia		+1%	+9%		-0%	+1%		-1%	-22%
North America		+3%	+1%		+2%	+0%		-0%	-2%
Worldwide		+3%	+5%		+6%	+4%		+2%	-4%

Source: [World ACD]

China–US and South Korea–US lanes reached their highest levels this year, at **$5,40** and **$5,73 per kg,** respectively. Meanwhile, rates from the Middle East and South Asia fell **↓4%** (w/w) amid a **↓16%** decline in regional tonnage. Despite the increases, few in the industry expect a peak season.[19] Overall, worldwide chargeable weight slipped **↓2%** (w/w), though year-on-year comparisons show continued resilience, with capacity up **~↑4%** and rates **~↑5%** higher than 2024 averages.

In other aviation news, a cargo aircraft operated by UPS crashed in a fiery explosion shortly after take-off from Louisville Muhammad Ali International Airport in Kentucky on 4 November, killing all three crew members aboard and four people on the ground, with a further 11 people injured. The crash also forced neighbouring facilities to catch fire and temporarily shut down the airport while investigations began into the apparent engine separation and fire.[20]

Elsewhere, the latest delay in Boeing's B777-X programme will continue to impact freight capacity over the coming two years.[21]

ENDS[22]

[19] Lennane, A. 31/10/2025. Airfreight rates get a lift, but no one expects a peak season boost now.
[20] Reuters. 04/11/2025. At least seven dead after UPS plane crashes in fireball on take-off from Louisville, Kentucky.
[21] Putzger, I. 04/11/2025. Latest delay sees large freighters remaining in short supply.

[22] **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.*