

Cargo Movement Update #245¹

Date: 3 August 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)	37 428	42 641	80 069	46 336	52 789	99 125	↓19%
Air Cargo (tons)	4 156	2 194	6 351	4 104	2 312	6 416	↓1%

Monthly Snapshot

Figure 1 – Cyclical⁴ monthly cargo volume, year on year (most metrics: Jun '24 vs Jun '25, % growth)

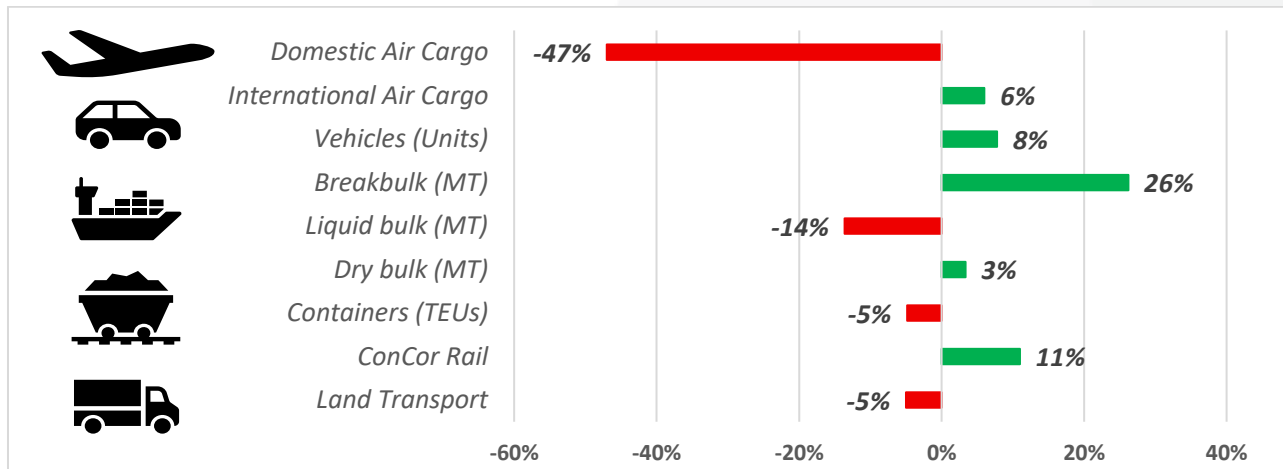
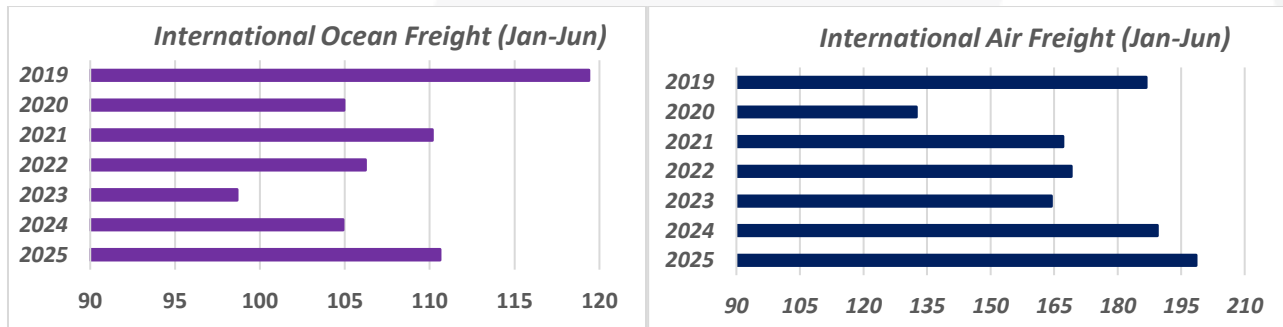


Figure 2 – Year-to-date flows 2019-2025⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~11 438 TEUs** was handled per day, with **~12 581 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 134** containers, up by **↑24%** from last week.
- Cross-border queue: **↓0,1 hrs**; transit: **unchanged**; SA borders: **~11,6 hrs (↑2%)**; SADC: **~4,7 hrs (↓2%)**.
- The IMF's July 2025 "World Economic Outlook" update revises global growth upward to **↑3,0%** for 2025.
- Global container throughput growth has been revised upwards to grow by **↑2,6%** in 2025.
- Global air cargo softened in most regions, though chargeable weight is up **↑5%** (y/y). Rates at: **\$2,44/kg**.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 245th 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, after several weeks of elevated throughput, a significantly reduced average of **11 438 TEUs** was handled daily, down from **14 161 TEUs** the previous week. The reduction in throughput could be attributed to the fact that inclement weather, vacant berths, staff engagements, and equipment challenges once again characterised port operations.

Vessel ranging, high swells, and adverse weather ensured operational delays in Cape Town, while equipment breakdowns, staff engagements, and inclement weather proved to be the main operational constraints in Durban. Agent delays and vacant berths disrupted operational performance at our Eastern Cape Ports. At the same time, operations at the Port of Richards Bay were primarily impacted by adverse weather and marine equipment challenges. The latest reports from TPT suggest that ten bays at the Interchange Zone (ITZ) 205 will be temporarily taken out of commission for essential concrete surface repairs from 1 August. The latest reports from Maersk suggest that the W7A Fruit Bridge service will omit Coega in the following weeks due to delays experienced in the West Africa port rotation. The same reports indicate that the MSC Carmen omitted the Port of PE this week, while the Santa Rita 252S/252N will call PECT after Durban to provide export reefer coverage in the Eastern Cape. Finally, the latest reports from TFR suggest that another derailment occurred near Thornwood on the line between Durban and Johannesburg towards the end of the week.

Global economic growth, according to the IMF, has been revised upward to **↑3,0** in 2025 – approximately matching global container throughput forecasts of **↑2,6%**. The current landscape reflects front-loaded trade activity, fiscal expansion, and looser financial conditions. However, the outlook remains fragile amid elevated uncertainty, mainly driven by sweeping US tariffs under President Trump. Meanwhile, despite the outlook in containerised trade, the oversupply remains a concern. Freight rates have subsided this week despite another downturn, as the seven weeks' worth of decreases in spot rates are expected to stop next week. Ultimately, global volatility persists, with implications for planning, pricing, and trade flows across key maritime corridors.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~594 000 kg** inbound (**↑1%**, w/w) and **~313 000 kg** outbound (**↓5%**). The slight uptick in imports offset the slight reduction in exports – reversing last week's trend. 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.

Operationally, air cargo handlers remain very concerned about the ongoing lack of clarity from ACSA regarding the occupation, management, and operating model of the **proposed R5,7 billion midfield cargo terminal** at OR Tambo. With no valid leases in place and no meaningful engagement from ACSA, stakeholders report increasing frustration, citing operational uncertainty and the absence of independent oversight as significant barriers to planning and investment.

Internationally, IATA this week revealed that African carriers face steep structural cost disadvantages compared to global peers (data as of 2024). The average cost per available tonne-kilometre (CATK) for African airlines is nearly **140 USD cents**, about **twice the global average**. Fuel costs alone indicate that CATK is over **↑63%** higher in Africa. Non-fuel costs (maintenance, overhead, etc.) run a staggering **↑112%** above global levels. In the high-frequency metrics from World ACD, July's performance reflects a stabilisation in global airfreight after recent volatility linked to trade policy and weather disruptions. In other air cargo news, all three US major carriers delivered robust second-quarter revenue and earnings; however, they all flagged

mounting challenges ahead, including weakening demand, rising uncertainty and cost pressures from fuel and labour.

Cargo movements along the N4 corridor increased slightly for road transport and increased somewhat for rail transport. Some operational delays were reported this week, notably road markings and aligning barriers as part of the TRAC N4 project. Truck volumes through the border post were **1 585 HGVs per day (↑2%, w/w)**. Queue times remained stable at an average of **5,1 hours (unchanged)** at the border, as the average processing time also remained the same (**5,1 hours**) per crossing. The rail to Maputo increased slightly to an average of **ten trains daily** (up by **four** from last week). Sugar trains from Eswatini decreased somewhat to around **one train a day**.

Land border crossing times decreased slightly at South African borders, while crossing for the rest of the SADC region, on average, remained unchanged. Overall, the average queue time decreased by approximately **10 minutes** from last week, while transit time remained unchanged. The median border crossing times at South African borders increased by **20 minutes**, averaging **~11,6 hrs (↑2%)** for the week. In contrast, the greater SADC region (excluding South African-controlled) decreased by around **10 minutes**, averaging **~4,7 hrs (↓2%)**. As has been the case over the last few weeks, 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**). Other developments of note include **(1)** Ramatlabama border post delays, **(2)** LPG tanker incident at Beitbridge, **(3)** Harare policing concerns, and **(4)** an increase in DRC copper hijackings.

In summarising this edition, South Africa's trade position remains precarious. Despite upward revisions to global growth, the domestic forecast remains unchanged at **↑1,0%** for 2025. The latest SARS merchandise figures show that the country recorded a **R22 billion** trade surplus in June, yet the cumulative surplus of **R80,2 billion** lags last year's **R92 billion**. And, with the imposition of **30% US tariffs**, export competitiveness to a critical market is further weakened (as we await the **7 August start date**), particularly when considering the undercutting gains made through AGOA. Moreover, our exemplary performance in the container industry expectantly reached a throughput limit this week, as we struggled to maintain full berth occupancy – ironically because of the elevated performance (of which Transnet and related stakeholders can be again complemented for) of the last few weeks.

As is the case internationally, domestically, persistent legal uncertainty, especially around the Merchant Shipping Bill and ongoing regulatory ambiguity in the parcel industry, continues to undermine investor confidence and the need to accelerate the reform agenda drive. Ultimately, transparent, consultative governance in trade, transport, and logistics will be essential to mitigate risks and support South Africa's participation in global trade – a key driver of economic growth and development.

Contents

Weekly Snapshot	1
Monthly Snapshot.....	1
Key Notes	1
Executive Summary.....	2
Contents.....	4
1. Ports Update	5
a. Container flow overview.....	5
b. Summary of port operations.....	7
i. Weather and other delays	7
ii. Cape Town.....	7
iii. Durban	8
iv. Richards Bay.....	10
v. Eastern Cape ports.....	10
vi. Transnet Freight Rail (TFR).....	11
2. Air Cargo Update	12
a. International air cargo	12
b. Air cargo operations.....	13
c. Domestic air cargo	13
3. SARS Merchandise Trade Update: June.....	13
4. Road and Regional Update	14
a. Lebombo border post update.....	14
b. SADC cross-border and road freight update.....	15
5. International Update	18
a. Global economy	18
i. IMF World Economic Outlook.....	18
ii. US trade and tariffs	18
b. Global shipping industry	19
i. Global container throughput and capacity growth	19
ii. Global freight rates	20
c. Global air cargo industry.....	21
i. African airlines are at a significant cost disadvantage.....	21
ii. Weekly air cargo trends	22

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 28 July to 3 August (measured in TEUs)

7-day flow reported (28/07/2025 – 03/08/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 606	32 245	↓17%
New Pier (Pier 1)	1 569	10 982	↓21%
Cape Town Container Terminal	1 946	13 625	↓28%
Ngqura Container Terminal	1 922	13 451	↓26%
Port Elizabeth Container Terminal	446	3 122	↑4%
Other	949	6 644	↑10%
Total	11 438	80 069	↓19%

Source: Calculated from TPT, 2025. Updated 03/08/2025.

After several weeks of elevated throughput, a significantly reduced average of ~11 438 TEUs (↓19%) was handled per day for the last week (28 July to 3 August, Table 2). The volume was also significantly below the projected average of ~12 581 TEUs (↓9% actual versus projected).

For the coming week, an increased average of ~12 581 TEUs (↑10%) is predicted to be handled (4 to 10 August, Table 3).

The reduction in throughput could be attributed to the fact that inclement weather, vacant berths, staff engagements, and equipment challenges once again characterised port operations.

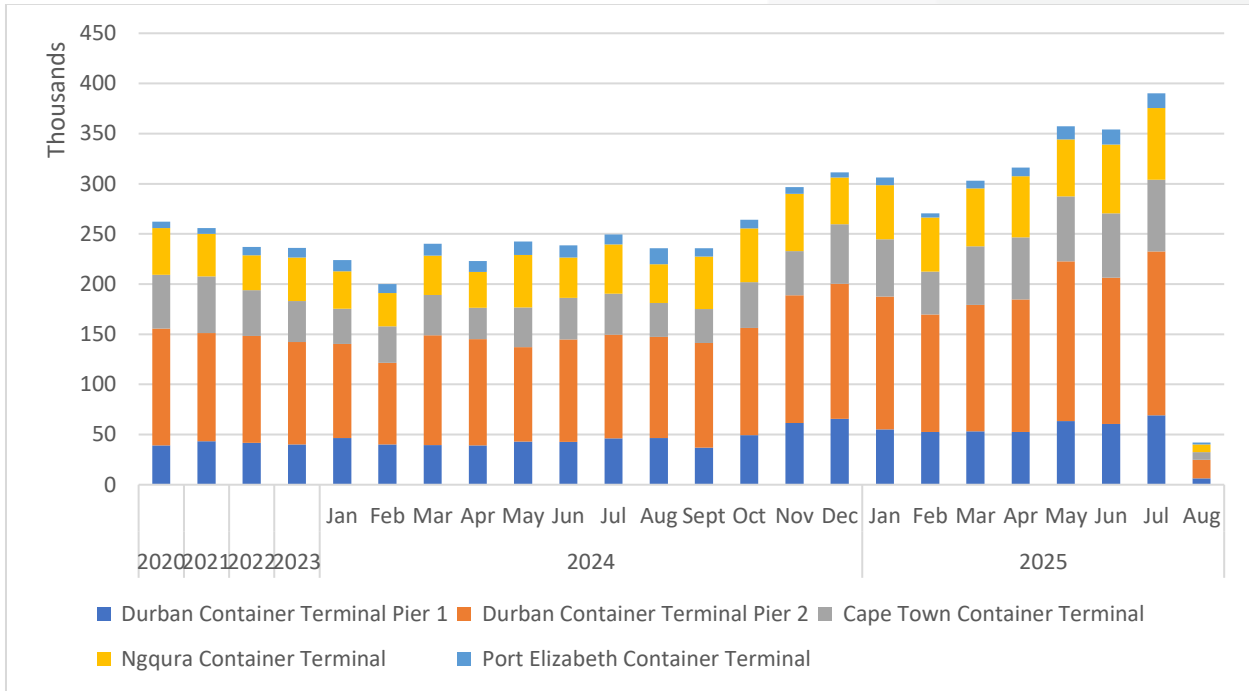
Table 3 – Container Ports – Weekly flow projected for 4 to 10 August (measured in TEUs)

7-day flow projected (04/08/2025 – 10/08/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 351	37 459	↑16%
New Pier (Pier 1)	2 051	14 360	↑31%
Cape Town Container Terminal	1 698	11 887	↓13%
Ngqura Container Terminal	2 088	14 614	↑9%
Port Elizabeth Container Terminal	478	3 347	↑7%
Other	914	6 399	↓4%
Total	12 581	88 066	↑10%

Source: Calculated from TPT, 2025. Updated 03/08/2025.

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.

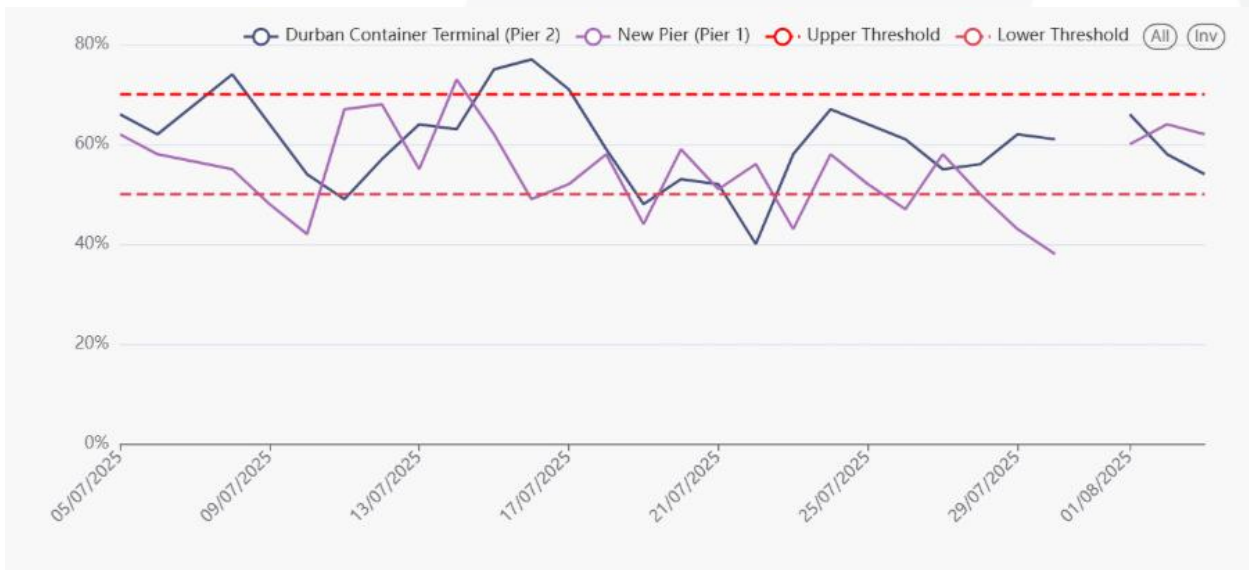
Figure 3 – Monthly flow reported for total container movement (thousands, 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 03/08/2025.

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

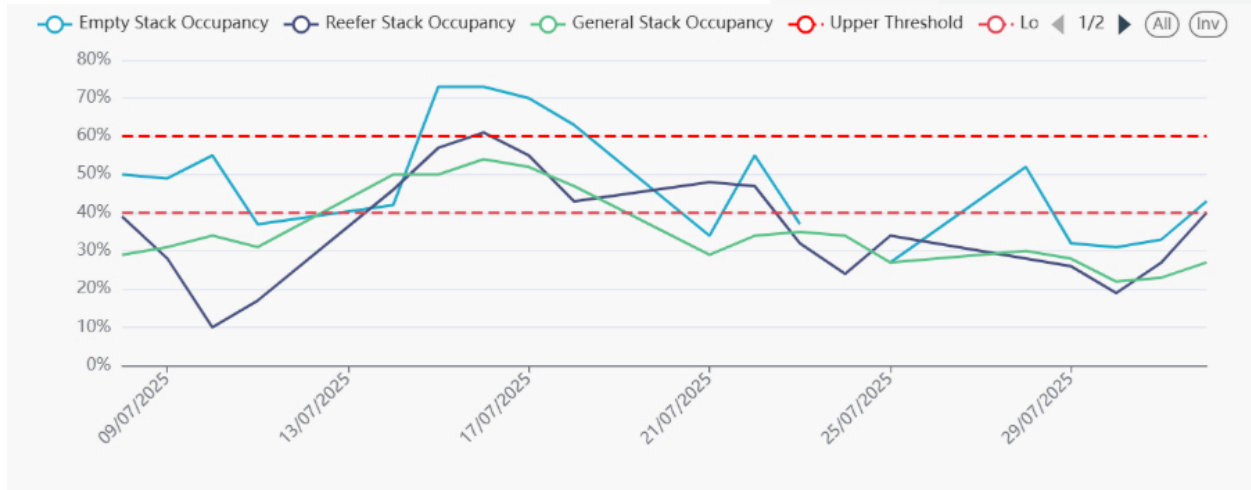
Figure 4 – Stack occupancy in DCT, general-purpose containers (5 July to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 03/08/2025.

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 (9 July to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 03/08/2025.

b. Summary of port operations

i. Weather and other delays

- Vessel ranging, high swells, and adverse weather ensured operational delays in Cape Town.
- Equipment breakdowns, staff engagements, and inclement weather proved to be the main operational constraints in Durban.
- Agent delays and vacant berths disrupted operational performance at our Eastern Cape Ports.
- Operations at the Port of Richards Bay were primarily impacted by adverse weather and marine equipment challenges.

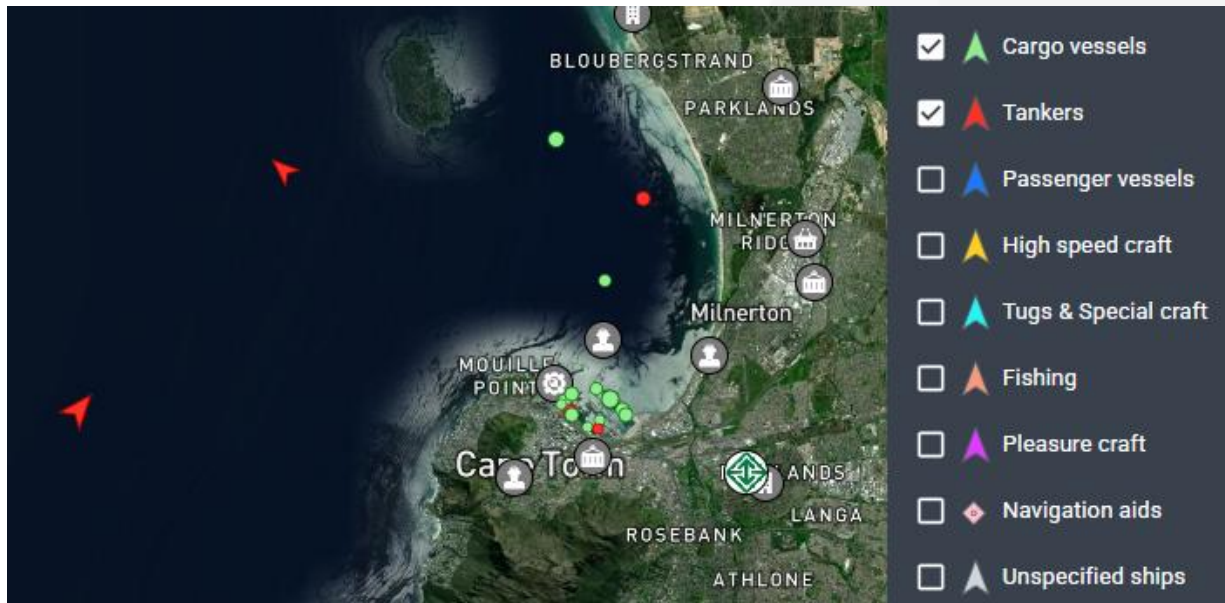
ii. Cape Town

On Thursday, CTCT recorded zero vessels at berth and three at anchor, as vessel ranging, high swells, and adverse weather proved to be the primary operational constraint at the port. On the landside, between Monday and Friday, the terminal managed to service at least 5 064 trucks while handling approximately 282 rail units. On the waterside, the terminal executed approximately 6 059 container moves across the quay during the same period. Additionally, this week the terminal operated with between **seven and eight STS cranes**, between **22-23 RTGs**, and around **58-59 hauliers** towards the end of the week (around Friday). Cranes LC6 and LC9 were out of commission before the weekend. Crane LC6 is anticipated to return to service over the weekend, with no ETR communicated for LC9 yet.

On Thursday, CTMPT recorded three vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 403 container moves and 496 tons on the waterside. On the landside, 274 trucks were processed during the same period. Stack occupancy was recorded at 30% for general cargo, 20% for reefers, and 114% for empties. For the most significant part of the week, the terminal operated with three cranes and four straddle carriers.

Between 21 and 27 July, the FPT terminal handled seven vessels: two multi-cargo, one dry bulk, three container vessels, and one vessel containing fruit. Berth occupancy during this period was recorded at 58%. The terminal planned to handle nine more vessels between 28 July and 3 August, with another seven vessels scheduled between 4 and 10 August. 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 03/08/2025 at 14:00.

iii. Durban

Pier 1 On Friday, Pier 1 recorded two vessels on berth, with one vessel at anchor. Between Monday and Friday, the terminal executed at least 5 376 gate moves and 158 rail moves on the landside. The **average TTT** for the week was **~50 minutes (↓4%, w/w)** and an average **staging time** of **~36 minutes (↑13%)**. Additionally, the terminal moved over 4 100 TEUs across the quay on the waterside during the same period. The terminal had between **four and five STS cranes** and **16-18 RTGs** available for the most significant part of the week.

Pier 2 had two vessels on berth and one at anchorage on Friday, as equipment breakdowns, staff engagements, and adverse weather prevented optimal operational performance this week. The terminal operated with **6-11 gangs** and moved over **13 700** containers across the quay between Monday and Friday on the waterside. Approximately **12 759** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~87 minutes (↓2%, w/w)** and an average **staging time** of also **~87 minutes (↓3%)**. Approximately 1 796 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **66** and **75** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **65%** during this period.

The latest reports from TPT suggest that ten bays at the Interchange Zone (ITZ) 205 will be temporarily taken out of commission for essential concrete surface repairs. The bays will be carried out of commission in two phases, each lasting 30 days. The repairs for the first phase are anticipated to start on 1 August and continue until around 30 August.

Durban's MPT terminal recorded zero vessels at berth on Thursday and one at outer anchorage. Stack occupancy for containers was recorded at 10% and the reefer stack at 69%, with the breakbulk stack at 40%. In the preceding 24 hours, 40 containers were handled on the waterside. On the landside, 159 container trucks were serviced at a TTT of ~20 minutes. Additionally, 28 breakbulk trucks, containing 518 tons, were serviced. During this period, three cranes, nine reach stackers, seven forklifts, and 21 ERFs were in operation.

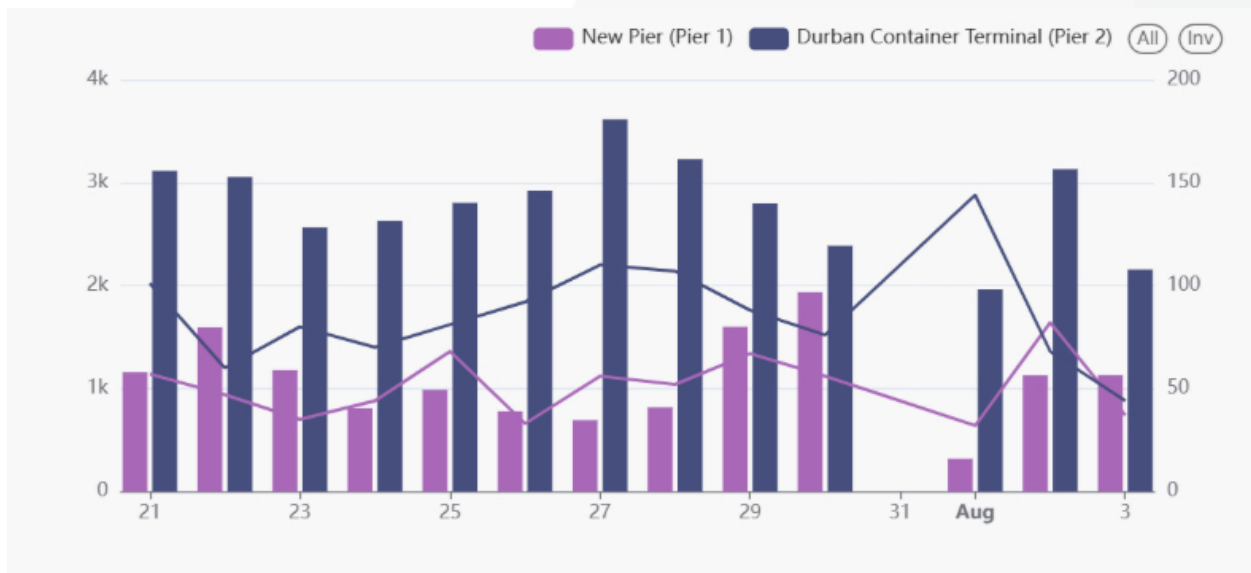
The latest reports from TPT maintain that the fourth crane is only scheduled to return to service around 21 December.

Between Wednesday and Thursday, the Maydon Wharf MPT recorded one vessel at berth and none at anchorage. On the waterside, 31 tons were handled across the quay, while 51 RMTs, containing approximately 1 703 tons, were serviced on the landside. During the same period, no volumes were handled at the agri-bulk facility because no vessel was on berth. The next vessel is anticipated to arrive around 04 August.

On Thursday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with two at anchorage. In the preceding 24 hours, the terminal handled 1 562 road units and 111 units on rail on the landside, while 2 130 units were handled on the waterside. Overall stack occupancy was 64%. During this period, the terminal had 184 high-and-heavy (abnormal loads) on hand and managed to handle 121.

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.

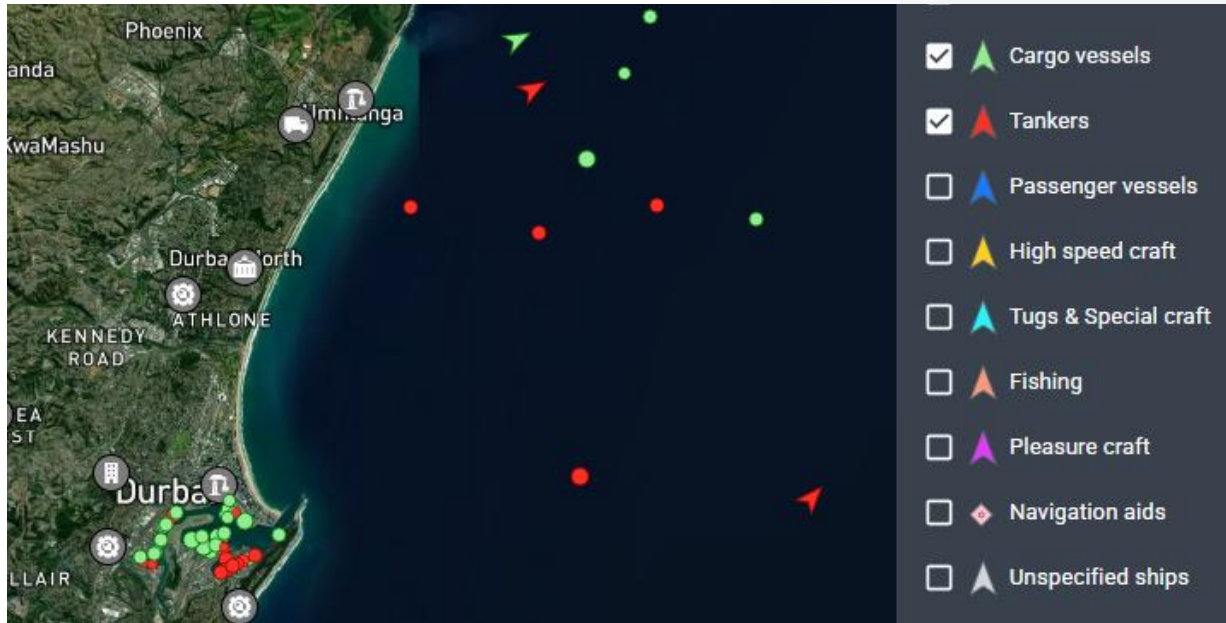
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 03/08/2025.

The queue of container vessels waiting outside Durban has picked up slightly, but remained low and almost unchanged from last week. On Monday evening (4 August), **two** container vessels were waiting outside at anchorage, **one** for Pier 1, **none** for Pier 2, and one for the Point terminal. The queue of dry (**eight**), liquid (**seven**), and breakbulk (**five**) vessels has significantly increased from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 03/08/2025 at 14:00.

iv. Richards Bay

On Thursday, the Port of Richards Bay had eight vessels at anchor and 14 on the berth, translating to four vessels at DBT, five at MPT, four at RBCT, and one at the liquid bulk terminal. Two tugs and one helicopter were deployed to support marine resources towards the end of the week. During this period, the pilot boat went out of commission but is anticipated to return to operations over the weekend. Additionally, operations at the port were mainly constrained by adverse weather as well as the pilot boat being out of commission towards the end of the week.

The daily average coal throughput for the week increased to around **129 000 tons** (↑5%, w/w). An average of **19 trains** was serviced on the landside (up by **one** from last week), slightly below the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded three vessels on berth and none 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 most significant part of the week, the Ports of PE and Coega shared a pilot boat due to some waterside equipment challenges. Stack occupancy figures were recorded at 33% for reefers, 69% for reefer ground slots, and 52% for the general stack. Despite experiencing agent delays for around four hours, the terminal handled approximately 3 415 TEUs and 88 reefers on the waterside. Approximately 803 trucks were processed on the landside at a TTT of ~33 minutes. Towards the end of the week, the terminal had seven STS cranes, 24 RTGs, and 49 hauliers in service.

Reports from Maersk suggest that the W7A Fruit Bridge service will omit Coega in the following weeks due to delays experienced in the West Africa port rotation. The Haiyan Gama 529N will omit the port in week 33, Maersk Northwood 531N in week 34, and the Maersk Newport 530N in week 35.

On Thursday, GCT had zero vessels at berth and zero 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, 435 trucks were processed at a TTT of ~40 minutes on the landside, while 442 TEUs and 72 reefers were

handled across the quay on the waterside. Stack occupancy was recorded at 31% for the general stack, 20% for reefers, and 35% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and eight straddles in service.

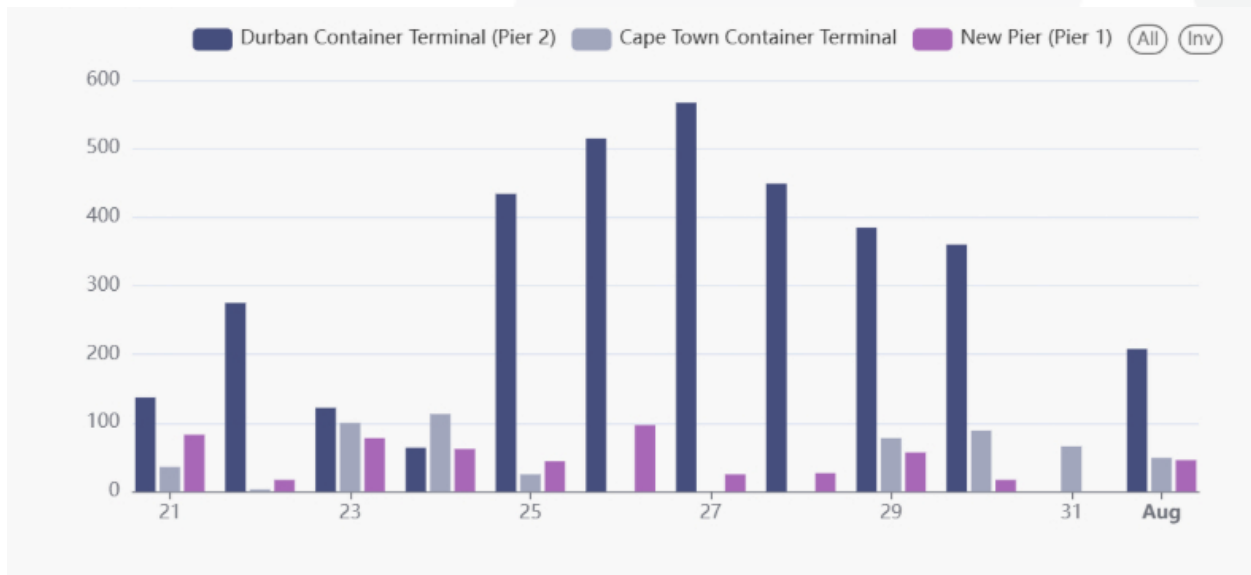
The latest reports from Maersk suggest that the MSC Carmen omitted the Port of PE this week. As a result, imports for Port Elizabeth were discharged in Durban, at Point Terminal and connected to the Horizon 492E for discharge at the Port of Port Elizabeth. The same reports suggest that the Santa Rita 252S/252N will call PECT after Durban to provide export reefer coverage in the Eastern Cape.

On Thursday, the Ro-Ro terminal had one vessel on berth and zero at outer anchorage. During the preceding 24 hours, the terminal handled around 1 607 units on the waterside, resulting in a stack occupancy of 54%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that another derailment occurred on the line between Durban and Johannesburg towards the end of the week. More specifically, the derailment happened near Thornwood on the Durban side and resulted in no trains running on the line. The line is expected to be recommissioned early next week. Currently, the possible causes and contributors of the derailment include track geometric/rail defects as well as the skew loading of containers and train handling. Additionally, on Friday, DCT Pier 2 had 233 ConCor units on hand with a dwell time of 120 hours and 324 over-border units with a dwell time of 48 days.

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



Source: Calculated using data from Transnet, 2024. Updated 03/08/2025.

In the last week (28 July to 3 August), rail cargo on the ConCor line out of Durban was reported at **3 134** containers, up by a significant **↑24%** from the previous week’s **2 520** 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 (28 July to 3 August).⁶ For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in July 2024 averaged ~863 000 kg daily, and ~887 000 kg daily for August 2024.

Table 4 – International inbound and outbound cargo from OR Tambo

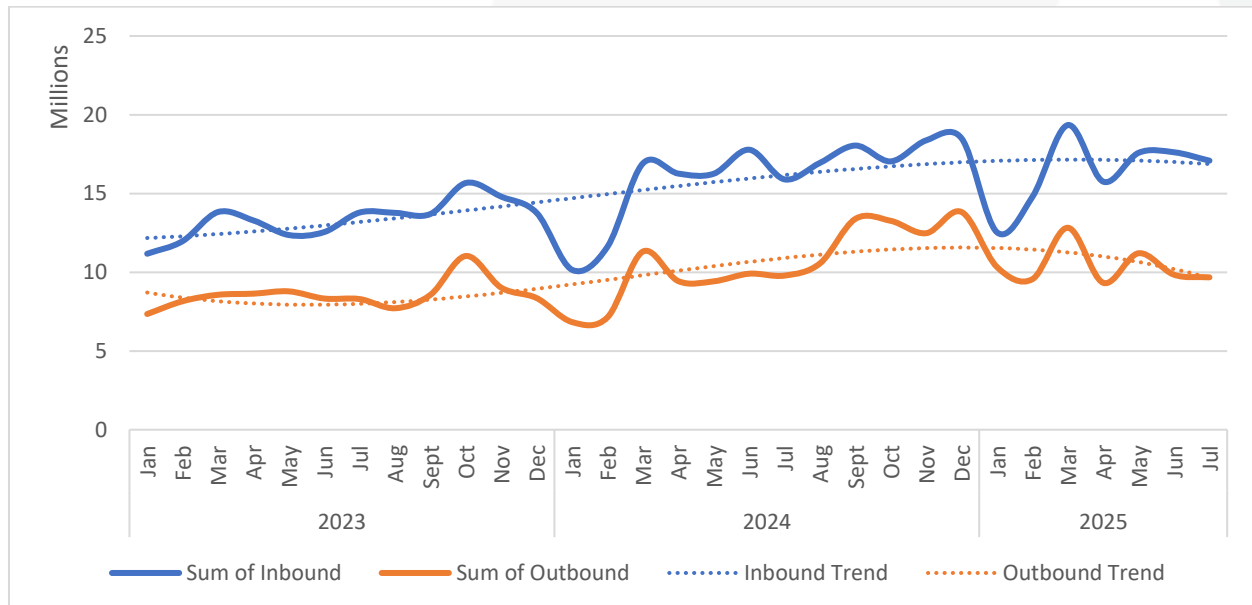
Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	593 781	4 156 470	↑1%
Volume outbound	313 477	2 194 341	↓5%
Total	907 259	6 350 811	↓1%

Courtesy of ACOC. Updated: 03/08/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to ~594 000 kg inbound (↑1%, w/w) and ~313 000 kg outbound (↓5%). The slight uptick in imports offset the slight reduction in exports – reversing last week’s trend. 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 to and from OR Tambo since the start of 2023:

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



Calculated from ACOC. Updated: 03/08/2025.

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

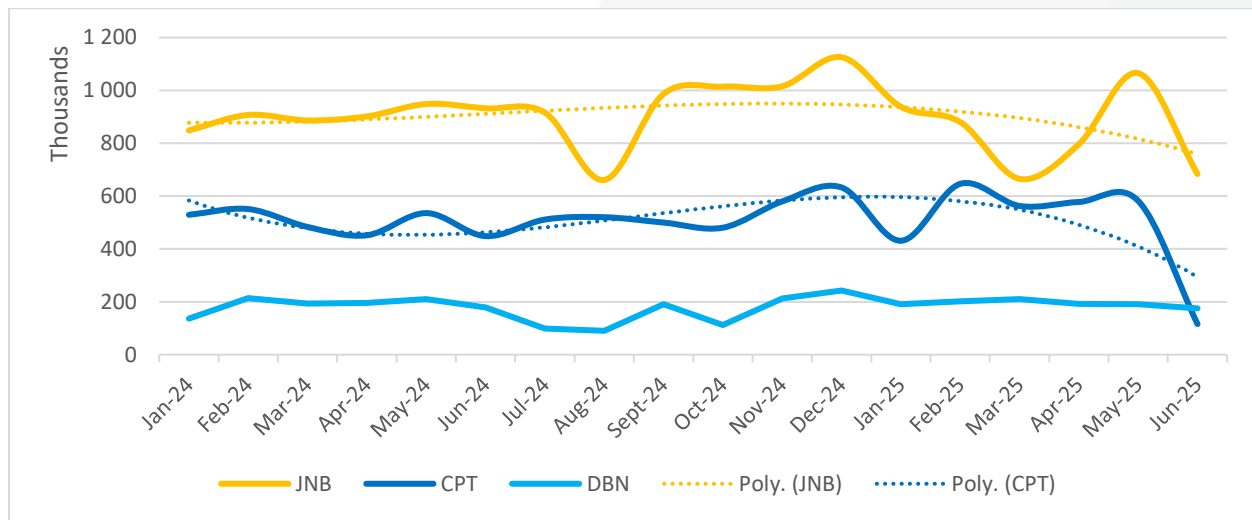
b. Air cargo operations

As reported last week, air cargo handlers remain very concerned about the continued lack of transparency and consultation from Airports Company South Africa (ACSA) regarding the R5,7 billion midfield cargo terminal development at OR Tambo International Airport. Despite the scale and significance of the investment, no valid lease agreements are currently in place, and handlers have been excluded from key planning and allocation decisions. This uncertainty is inhibiting operational planning, capital investment, and long-term strategy among affiliated operators. Industry stakeholders are now calling for independent regulatory oversight to ensure equitable governance, data transparency, and an inclusive framework for determining the future operating model of the terminal.

c. 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: 03/08/2025.

3. SARS Merchandise Trade Update: June

SARS released its latest "Merchandise Trade Statistics" for June⁷, revealing a preliminary monthly trade surplus of **R22 billion**. Monthly trade data indicate that exports decreased by **↓1,9%** from May (m/m) to **R170,7 billion**, while imports decreased by **↓5,3%** (m/m) to **R148,6 billion**. The year-to-date trade surplus of **R80,2 billion** was lower than the **R92 billion** for the comparable period in 2024. On an annual basis, export flows for June 2025 were **↓2,9%** (y/y) lower than in June 2024, while import flows were higher by **↑0,6%**.

Regionally, trade with BELN countries for June resulted in a trade surplus of **R10,1 billion**, derived from exports of **R16,5 billion** and imports of **R6,3 billion**. Exports to our neighbouring countries decreased by **↓4,4%** (m/m) between May and June 2025, while imports rose by **↑13,7%** (m/m) over the same period. Cumulative figures for the year demonstrate a comparable trade balance with BELN countries, increasing slightly from **64,8 billion** in 2024 to **R65,1 billion** in 2025. Excluding BELN countries, South Africa's trade balance with all other trading partners recorded a net surplus of **R10,9 billion**.

⁷ SARS. 31/03/2025. [Trade Statistics: June 2025](#).

4. Road and Regional Update

a. Lebombo border post update

In the last week (28 July to 3 August), cargo movements along the N4 corridor increased slightly for road transport and increased somewhat for rail transport. Some operational delays were reported this week, notably road markings and aligning barriers as part of the TRAC N4 project. The following notes summarise the recent developments:

- Truck volumes through the border post were **1 585 HGVs per day (↑2%, w/w)**.
- Queue times remained stable at an average of **5,1 hours (unchanged)** at the border, as the average processing time also remained the same (**5,1 hours**) per crossing.
- The rail to Maputo increased slightly to an average of **ten trains daily** (up by **four** from last week). Sugar trains from Eswatini decreased somewhat to around **one train a day**.
- Operationally, as part of the TRAC N4 project, road marking resulted in some delays on the bypass, as one lane at each interval was closed to allow the process to be finalised. For exports, the barriers were also aligned, taking longer.

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	1 585	1 379	1 147	252	35	89	50	293	10	9,4	2,6	1,4
% (w/w)	2%	-11%	3%	-4%	-29%	12%	22%	5%	40%	-4%	62%	-43%
% 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 03/08/2025.

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 03/08/2025 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 **10 minutes** from last week, while transit time remained unchanged.
- The median border crossing times at South African borders increased by **20 minutes**, averaging **~11,6 hrs (↑2%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) decreased by around **10 minutes**, averaging **~4,7 hrs (↓2%)**.

1. Ramatlabama border post:

- a. Operations were temporarily suspended due to a lack of water and non-functional ablution facilities.
- b. The RAMP contractor was on-site addressing the issue, and the border was up and running again soon.

2. Beitbridge incident:

- a. An LP Gas tanker experienced mechanical issues at the Shell garage near the border.
- b. Border operations were suspended while gas was transferred to another tanker, but resumed temporarily due to further mechanical faults.
- c. Transporters were advised to avoid the area until safety could be confirmed the following morning.

3. Harare policing concern:

- a. A truck driver was delayed for hours after a police officer at Southerton Police Station refused to review his documents.
- b. NTBs such as this are severely hampering intra-African trade, remaining a daily occurrence with no apparent resolution.

4. DRC copper hijackings:

- a. Fesarta is engaging with authorities in the DRC following an increase in copper cargo hijackings in the Tumbwe district (between Likasi and Lubumbashi).
- b. All incidents follow a similar modus operandi – transporters are instructed to remain vigilant.

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

Table 6 – Delays⁸ summary – South African borders (both directions)

Border Post	Direction	HGV ⁹ 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	501	36,1	8,3	36,0	15 030	3 507
Beitbridge	Zimbabwe-SA	496	15,0	2,3	14,6	14 880	3 472
Groblersbrug	SA-Botswana	223	13,5	1,5	13,3	6 690	1 561

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

Border Post	Direction	HGV ⁹ Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Martin’s Drift	Botswana-SA	224	2,4	0,5	2,2	6 720	1 568
Kopfontein	SA-Botswana	192	13,0	1,4	13,0	5 760	1 344
Tlokweng	Botswana-SA	19	0,5	0,2	0,3	570	133
Vioolsdrift	SA-Namibia	30	4,9	1,3	4,5	900	210
Noordoewer	Namibia-SA	20	1,9	0,4	1,5	600	140
Nakop	SA-Namibia	30	4,2	0,5	4,1	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,3	1,1	600	140
Skilpadshek	SA-Botswana	233	5,2	2,0	5,1	6 990	1 631
Pioneer Gate	Botswana-SA	55	0,0	0,0	0,0	1 650	385
Lebombo	SA-Mozambique	1 551	5,1	1,2	5,1	46 530	10 857
Ressano Garcia	Mozambique-SA	1 492	1,4	0,2	1,2	44 760	10 444
Sum/Average			5 086	7,5	1,4	7,3	152 580

Source: TLC, FESARTA, & Crickmay, week ending 27/07/2025.

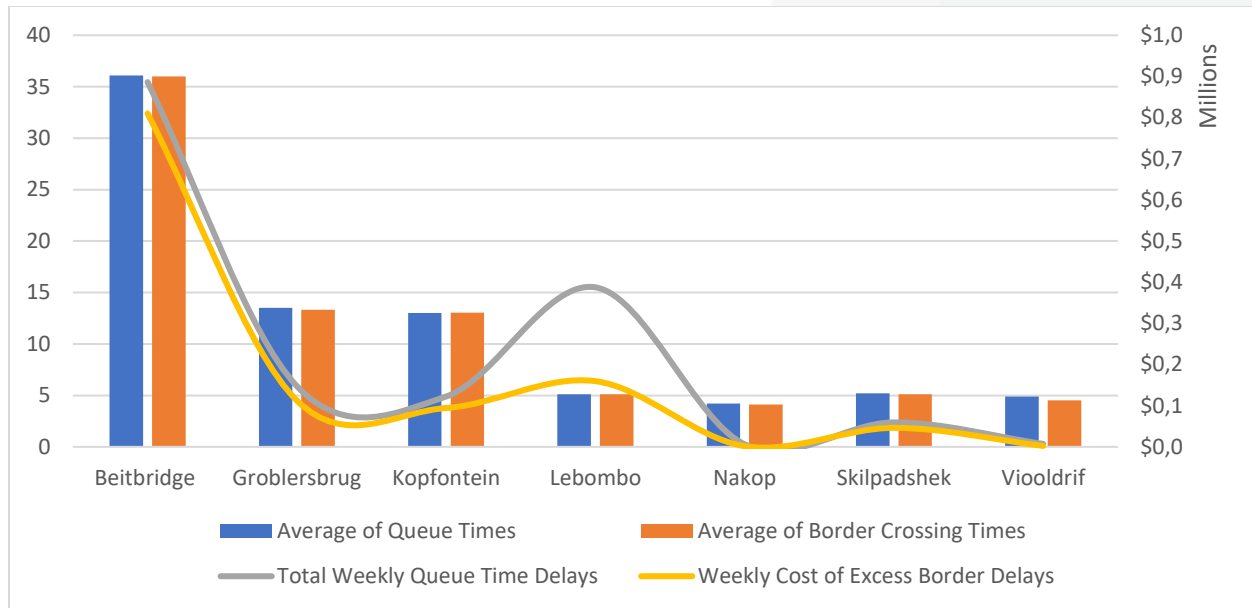
Table 7 – Delays summary – Corridor perspective

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	14,6	5,5	14,3	9 600	2 240
Central Corridor	798	0,8	0,1	0,8	23 940	5 586
Dar Es Salaam Corridor	1 819	12,3	1,3	12,1	54 570	12 733
Maputo Corridor	3 043	3,3	0,7	3,2	91 290	21 301
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 612	10,5	1,5	10,4	108 360	25 284
Northern Corridor	2 817	1,4	0,1	1,4	92 520	21 588
Trans Caprivi Corridor	318	2,2	0,7	2,1	9 540	2 226
Trans Cunene Corridor	100	3,0	0,6	2,8	3 000	700
Trans Kalahari Corridor	116	12,5	2,4	12,3	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	13 170	5,5	0,9	5,4	403 110	94 059

Source: TLC, FESARTA, & Crickmay, week ending 27/07/2025.

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

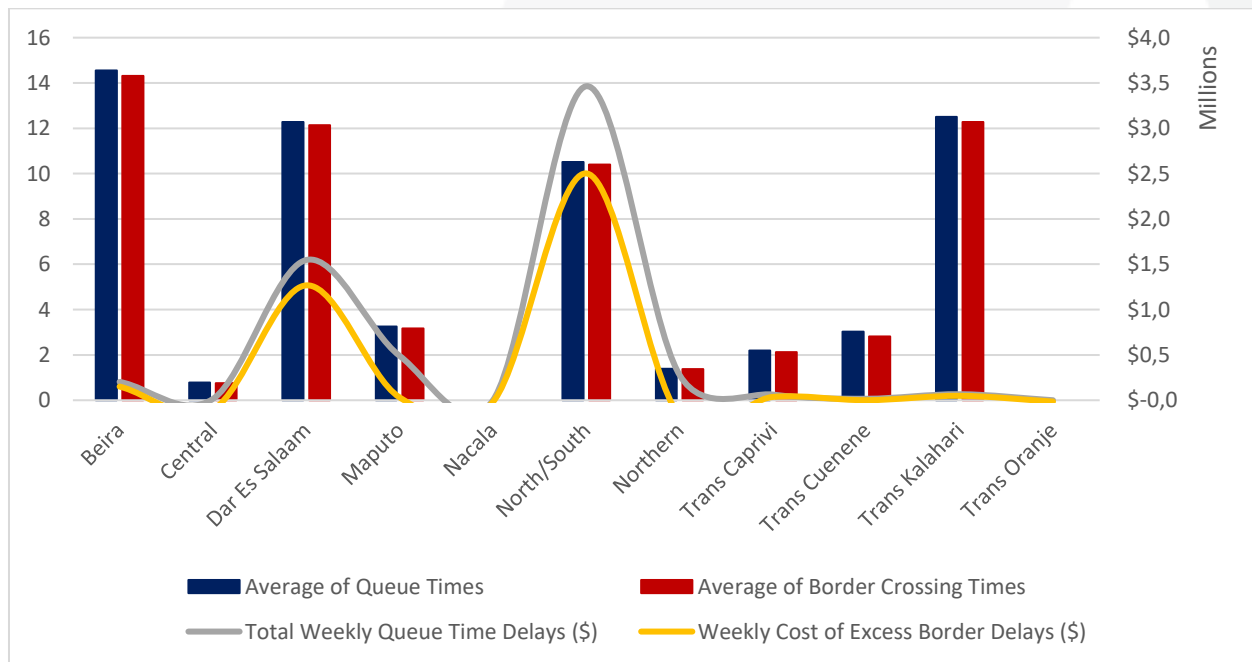
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 27/07/2025.

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 27/07/2025.

In summary, cross-border queue time averaged **~5,5 hours** (down by **~0,1 hours** from the previous week's **~5,5 hours**), indirectly costing the transport industry an estimated **\$6,1 million (R109 million)**. Furthermore, the week's average cross-border transit times also hovered around **~5,4 hours (unchanged)** from the **~5,4 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$3,7 million (R66 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$9,9 million (R175 million)**, up by **~R5 million or ↑3,4%** from **~R170 million** in the previous report).

5. International Update

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

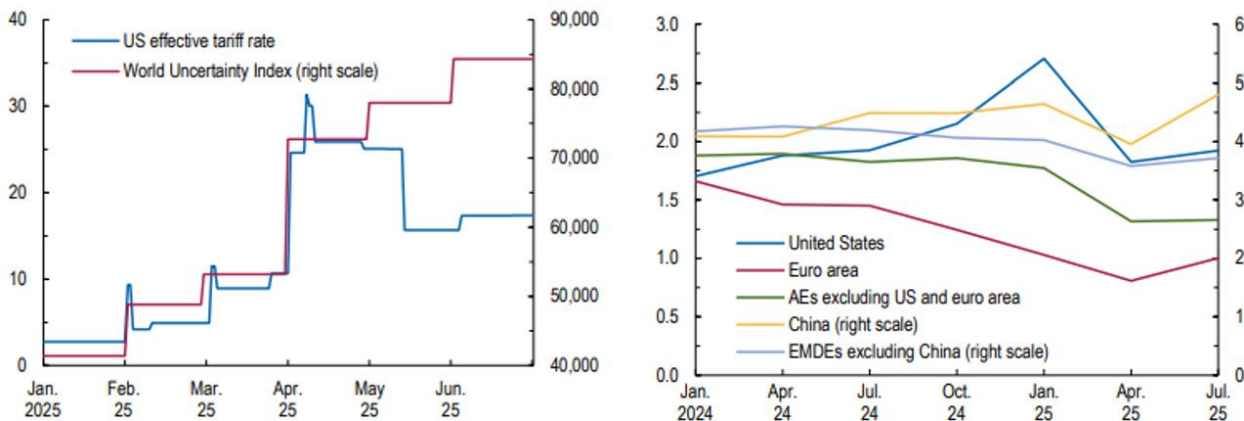
a. Global economy

i. IMF World Economic Outlook

The IMF’s July 2025 “*World Economic Outlook*” update revises global growth upward to **↑3,0%** for 2025 (**0,2%** above the April forecast), reflecting unexpected front-loading of trade and investment activity in anticipation of higher tariffs, looser financial conditions, and fiscal expansion in key economies. However, this apparent resilience masks underlying fragility, with much of the uptick driven by temporary distortions rather than fundamental strength.

Tariff-related uncertainty remains elevated. While recent pauses in tariff hikes – especially between the US and China (as reported last week) – have lowered effective rates temporarily, looming deadlines, legal ambiguity, and threats of further escalation weigh heavily on the global outlook. Should planned tariffs materialise, global GDP could be **0,2% lower** in 2025. Sector-specific tariffs and non-tariff barriers may further amplify inflationary pressures and disrupt supply chains, as the following side-by-side figures illustrate:

Figure 15 – LH: Tariffs and global uncertainty (%; index) & evolution of growth forecasts (%)



Source: [IMF](#)

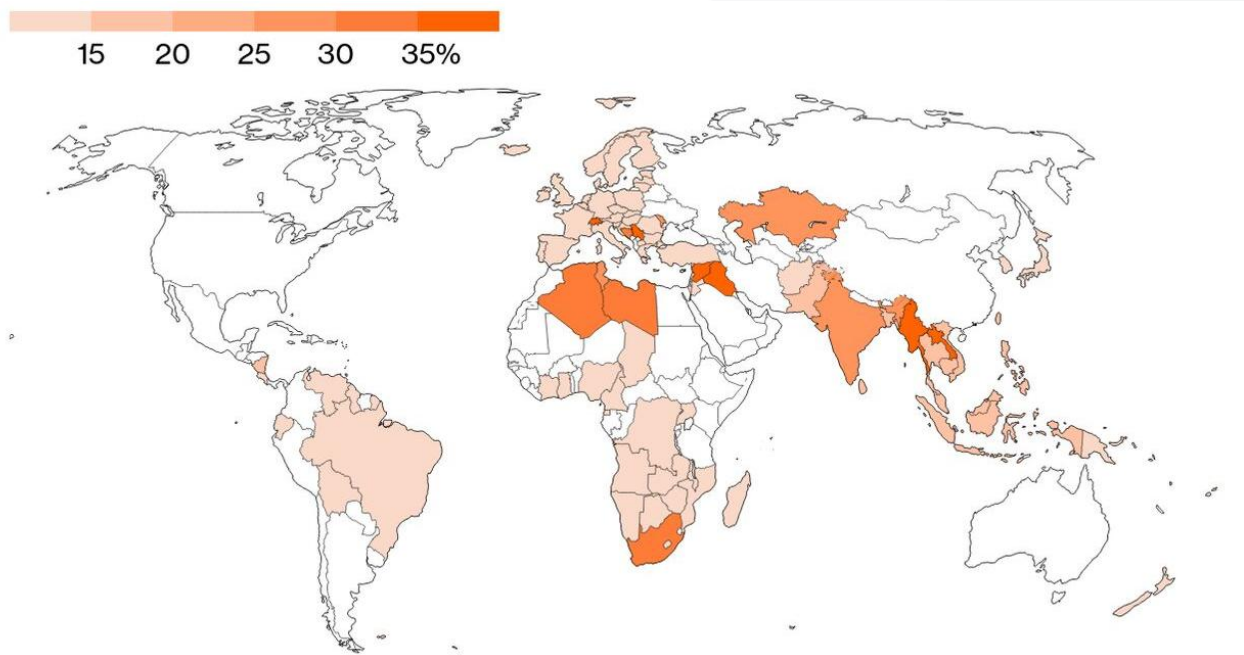
To mitigate the risks outlined, the IMF urges policymakers to restore confidence through transparent and rules-based trade frameworks. Multilateral cooperation, targeted industrial policy, and credible fiscal consolidation are essential. Monetary policy must be carefully calibrated to address divergent inflationary dynamics across tariff-imposing and tariff-affected countries. Structural reforms – particularly in education, regulation, and labour mobility – are critical to boosting productivity and lifting medium-term growth. The overarching imperative is predictability, sustainability, and cross-border policy coordination. Finally, South Africa is forecast to grow at **↑1,0%** for 2025 – unchanged from the April forecast.

ii. US trade and tariffs

As mentioned above (and reported throughout the last couple of months), the imposition of sweeping US tariffs under President Trump’s administration has heightened global trade tensions. A **10% global minimum tariff** now applies broadly, with elevated rates – **up to 50%** - targeting economies with large US trade surpluses. While the USMCA bloc remains exempt, many advanced economies and key exporters face

considerable disruptions, reflected in global market volatility. For South Africa, the impact is direct and acute¹⁰ – and the country stands out internationally:

Figure 16 – New US reciprocal tariff rates (per country, %)



Source: [The White House via Bloomberg](#)

Most exports now face a punitive **30% duty**, up from zero under AGOA preferences. This jeopardises over **R80 billion in bilateral trade** (of the **R277 billion in total bilateral trade** between the two countries) and places domestic exporters – particularly in automotive and metals – at a severe competitive disadvantage. The tariff escalation threatens jobs and investment in South Africa’s export sectors, underscoring the country’s vulnerability to geopolitical trade realignments. But more than anything, the volatile landscape is driving uncertainty, as planning is nearly impossible. However, traders are encouraged to have their goods in transit by Thursday, 7 August and clear into the US before 5 October to retain current tariffs.

b. Global shipping industry

i. Global container throughput and capacity growth

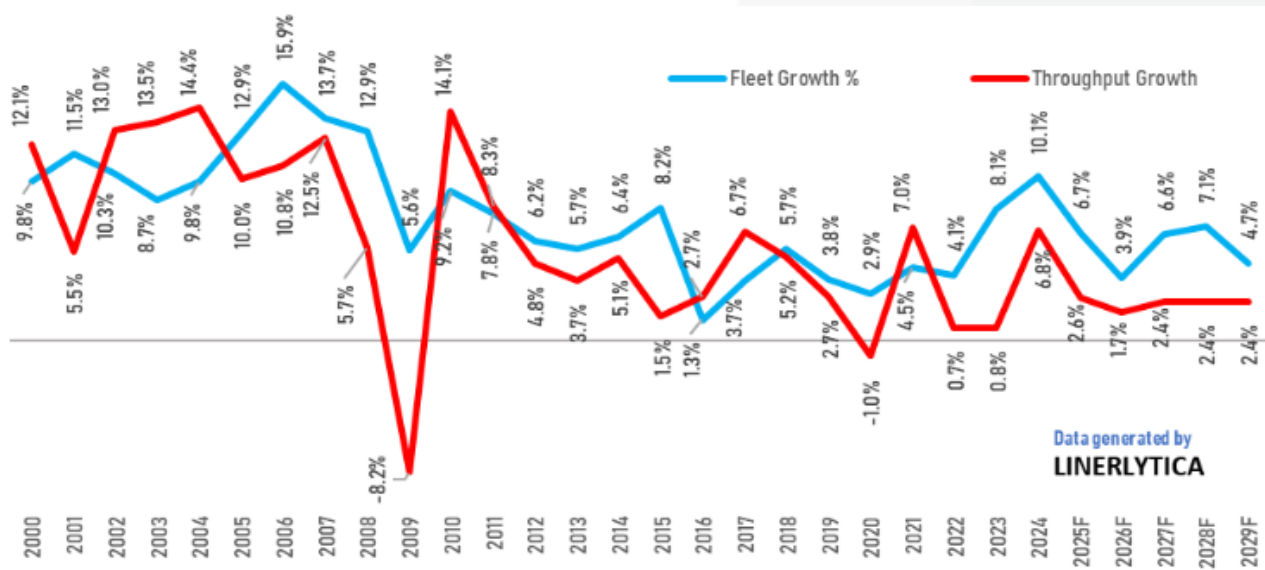
Global container throughput growth has been revised upwards and is expected to grow by **↑2,6%** in 2025, in line with the IMF’s revised global GDP growth outlook. In the maritime economy, the main drivers remain cargo front loading during the first half of this year, lower effective US tariff rates, improved financial markets and government fiscal stimulus by several key countries.

Despite the revision, the US tariffs have already spurred higher inflation and slower job growth, which will lead to slower growth in the 2nd half of 2025, with the lower growth rate expected to carry over into 2026, with global volume growth expected to slow to **↑1,7%**. The bigger challenge will come from the supply

¹⁰ MacKay, D. 01/08/2025. [SA exports to the US attract a 30% duty.](#)

imbalance as the containership fleet growth will continue to outpace demand growth, with excess supply projected to persist through 2029:

Figure 17 – Fleet growth and container throughput growth (annual growth rate, %)



Source: [Linerlytica](https://www.linerlytica.com)

Elsewhere, port congestion has increased significantly this week and is trending around **3,06 million TEU** (↑**17%**, w/w), accounting for **9,4% of the current fleet**.¹¹

ii. Global freight rates

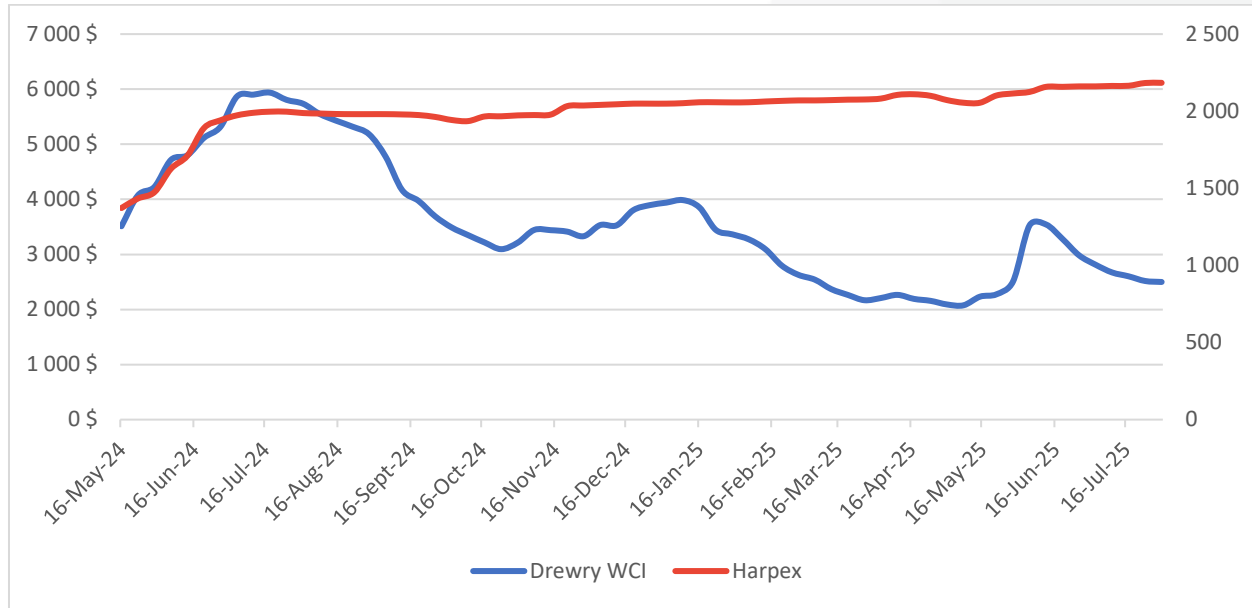
Global spot rates declined for a 7th consecutive week – albeit much less compared to the previous weeks. Drewry's "World Container Index" is down by ↓**0,7%** (or **\$18**) to **\$2 499 per 40-ft container** this week.¹² Meanwhile, the Harper Petersen Index (Harpex) remained stable and traded around **2 184 points** on Friday. Spot rates and charter rates continue to diverge, as illustrated:¹³

¹¹ Linerlytica. 04/08/2025. [Market Pulse – Week 31](#).

¹² Drewry. 24/07/2025. [World Container Index](#).

¹³ Harpex. 25/07/2025. [Harper Petersen & Co Charter Rate Index](#).

Figure 18 – World Container Freight Index (\$ per 40ft) & Harper Petersen Charter Index



Source: Calculated from [Drewry](#) & [Harpex](#)

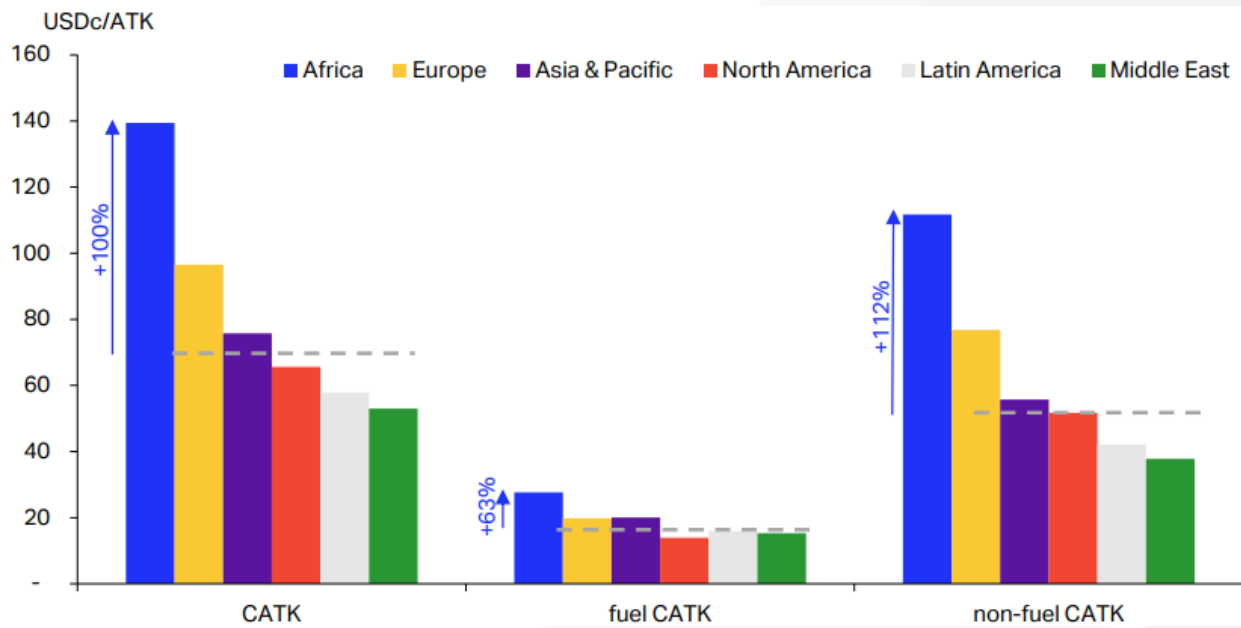
c. Global air cargo industry

i. African airlines are at a significant cost disadvantage

IATA’s latest “*Chart of the Week*” reveals that African carriers face steep structural cost disadvantages compared to global peers (data as of 2024).¹⁴ The average cost per available tonne-kilometre (CATK) for African airlines is nearly **140 USD cents**, about **twice the global average**. Fuel costs alone indicate that CATK is over **↑63%** higher in Africa. Non-fuel costs (maintenance, overhead, etc.) run a staggering **↑112%** above global levels:

¹⁴ IATA. 01/08/2025. [Chart of the Week: Cost disadvantage of African airlines.](#)

Figure 19 – Cost category per ATK per region, as of 2024 (USD cents/ATK)



Source: [IATA](#)

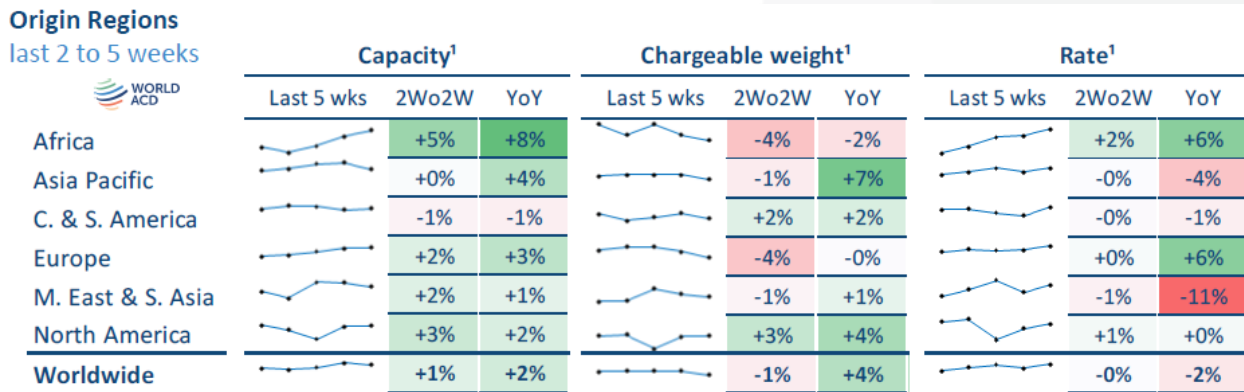
A key driver remains the ageing aircraft fleet, which African airlines operate (~5 years older than the global average), leading to lower fuel efficiency, higher maintenance frequency, longer downtimes, and supply-chain delays for parts. Limited competition, high logistics costs, and weak purchasing leverage from smaller purchase volumes inflate fuel input costs. African jet fuel is among the highest-priced globally. Moreover, market fragmentation hurts unit economics. Smaller networks, low frequencies and thin traffic volumes prevent African airlines from spreading fixed costs efficiently. Furthermore, the tax burdens in African countries compound the challenge: the average corporate income tax rate is ~28%, the highest across all regions, limiting reinvestment capacity.

These structural cost disparities impair profitability, limit reinvestment in modernisation, and hinder competitiveness in global and pan-African markets. For sustainable improvement, IATA suggests policymakers should (1) support fleet renewal and access to financing, (2) enhance fuel market competition, (3) lower taxes and regulatory charges, and (4) foster broader market integration (e.g. via SAATM/Yamousoukro decision implementation). Ultimately, closing this cost gap is essential to unlocking Africa’s aviation potential and supporting future-oriented growth, particularly as intra-African traffic demand rises.

ii. Weekly air cargo trends

In the high-frequency metrics from World ACD, global air cargo markets remained stable in late July. However, the tonnages softened in the third week of July from most of the world’s central regions, with few signs of any last-minute surge in tonnages ahead of the latest US tariff deadline. Worldwide chargeable weight rose ↑5% (y/y), driven by strong growth from Asia Pacific (↑7%) and Central and South America (↑5%).

Figure 20 – Region to region: capacity, chargeable weight, and rates (last two to five weeks, % change)



Source: [World ACD](#)

Global average rates edged up slightly (↑1%, w/w) to **\$2,44 per kg**, based on a full-market average of contract rates and spot rates, with spot rates also edging up ↑1% to **\$2,66/kg**. Notably, volumes from China and Hong Kong to the US rebounded after Typhoon *Wipha*, with ↑4% and ↑5% week-on-week increases, respectively. However, tonnage to Europe was slower to recover. Spot prices from South Korea to the US surged ↑29% (w/w) to **\$6,01/kg**, following a sharp decline. Overall, July’s performance reflects a stabilisation in global airfreight after recent volatility linked to trade policy and weather disruptions.

In other air cargo news, all three US major carriers (American, Delta, and United) delivered robust second-quarter revenue and earnings, driven by strong premium demand and favourable cargo growth, with Delta notably reinstating full-year guidance following excellent results.¹⁵ Nonetheless, they all flagged mounting challenges ahead, including weakening domestic leisure demand, rising economic uncertainty and living costs, cost pressures from fuel and labour, and reduced pricing power, especially for low-fare operators like Southwest.

ENDS¹⁶

¹⁵ Putzger, I. 04/08/2025. [US big three airlines report strong Q2, but headwinds are ahead.](#)

¹⁶ **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.*