

Cargo Movement Update #240¹

Date: 29 June 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)	41 004	46 715	87 719	45 458	51 790	97 248	↓10%
Air Cargo (tons)	3 797	2 102	5 898	4 199	2 250	6 449	↓9%

Monthly Snapshot

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

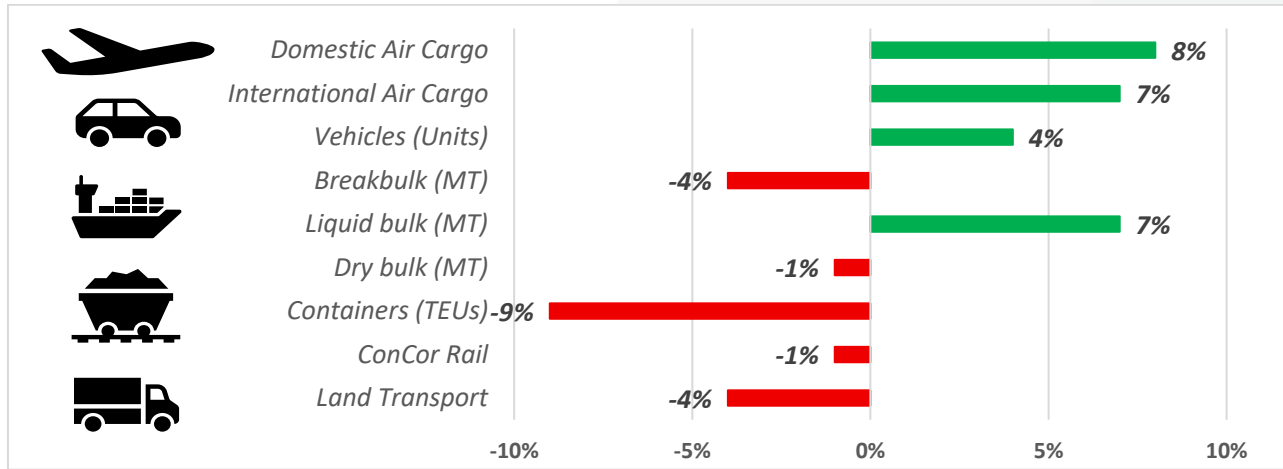
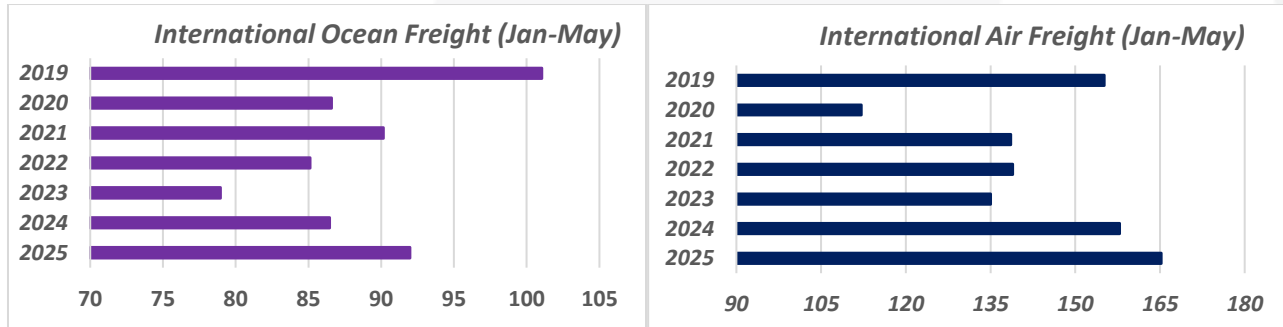


Figure 2 – Year-to-date flows 2019-2025⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~12 531 TEUs** was handled per day, with **~12 609 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 422** containers, up by **↑4%** from last week.
- Cross-border queue: **↑0,1**; transit: **↑0,8 hrs**; SA borders: **9,6 hrs (↓11%)**; SADC: **4,7 hrs (no change)**.
- Drewry's "Global Container Port Throughput Index" increased **↑0,5%** (m/m) and **↑5,6%** (y/y) in April.
- Global spot rates fell for the 2nd consecutive week, as the WCI declined by **↓9%** (or **\$296**) to **\$2 983/40ft**.
- IATA: CTKs of **↑2,2%** (y/y) for May. More frequent: tonnages **↑2%** (w/w) & **↑5%** (y/y). Rates @**\$2,43/kg**.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 240th 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: May vs May.

⁵ Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, another high average of **12 531 TEUs** was handled daily, decreasing slightly from the record **13 893 TEUs** the previous week. Despite another high volume week, port operations were still interrupted by adverse weather, empty berths, as well as continuous equipment breakdowns and shortages. The Port of Cape Town experienced more than 30 operational hours of downtime due to adverse weather this week, while the main operational constraints in Durban were equipment challenges and adverse weather. Rehabilitation continues on Bayhead Road. Empty berths, equipment challenges, and a power failure prevented optimal performance at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. The latest reports from TFR indicate that intermittent cable theft is ongoing on the central corridor; however, trains continue to operate despite the incidents that have occurred. Additionally, delays of up to 12 hours were experienced over the weekend (21 & 22 June) on the line between Johannesburg and Mafikeng due to “diesel breakdowns.”

Global shipping continues to evolve with carriers deploying larger vessels on new trades, exemplified by MSC shifting ULCVs to West and South Africa. Geopolitical tensions remain a key factor, with CMA CGM resuming Red Sea transits while many carriers reroute via the Cape of Good Hope. Meanwhile, global container port throughput increased year-over-year in April, but freight rates fell **↓9%** this week, led by a **↓16%** decline on the Transpacific. These trends highlight shifting capacity patterns, persistent risks, and an industry adjusting to volatile demand – something we’ve become very used to. Other developments include **(1)** the transpacific market faces signs of an early peak season slowdown as US inventories soften, **(2)** European port congestion remains a challenge, and **(3)** the *Morning Midas* car carrier sank 21 days after fire damage.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~540 000 kg** inbound (**↓10%**, w/w) and **~300 000 kg** outbound (**↓7%**). Despite another weekly reduction, cargo is trending at the same level as last year (**↓0,3%**, y/y), but below the comparative levels of pre-pandemic 2019 (**↓7%**).

Internationally, global air cargo demand (CTK) increased by **↑2,2%** in May (y/y); however, seasonally adjusted CTKs contracted by **↓1%** (m/m). Available cargo capacity (ACTK) expanded by **↑2%** (y/y), resulting in a steady cargo load factor of **44,5%**, as jet fuel prices remained **↓18,8%** lower. In the more frequent data, global air cargo tonnages rose by **↑2%** (w/w) and by **↑5%** (y/y). The Middle East and South Asia volumes rebounded (**+10%**, w/w) as Gulf airspace reopened following the **Israel–Iran ceasefire**, although full normality may take weeks, as Africa-origin volumes grew **↑4%** (w/w).

Cargo movements along the N4 corridor increased slightly for road, as the rail shutdown has seen a modal shift onto road. This week, truck volumes through the border post were **1 653 HGVs per day** (**↑2%**, w/w). Queue times increased to an average of **4,0 hours** (**↑48%**) at the border, as the average processing time also increased to around **3,6 hours** (**↑50%**) per crossing. Rail cargo is expected to resume operations by the end of the week, following the reintroduction of services.

Land border crossing times decreased at South African borders while remaining primarily unchanged throughout the rest of the SADC region. Overall, the average queue time increased by **10 minutes** from last week, while transit time decreased by around **three-quarters of an hour**. The median border crossing times at South African borders decreased by **an hour and a quarter**, averaging **~9,6 hrs** (**↓11%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**). 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

included **(1)** Zimra's anti-smuggling initiative involving **100% cargo scanning** at key borders (Beitbridge and Chirundu) has resulted in long queues; **(2)** traffic incidents in Harare; and **(3)** the cobalt export ban in Zimbabwe has been extended by three months.

In summarising this edition, several encouraging themes are shaping the recent South African logistics narrative, none more so than in the container sector. After two weeks of high container throughput numbers, the optimism is continuing as Ngqura is getting ready to receive the *MSC Nicola Mastro* – an ultra-large container vessel (ULCV) with a capacity of more than **24 000 TEU** and part of the top tier of the world's largest container ships. This is a first for South Africa, as our container terminals typically accommodate neo-Panamax vessels with capacities up to around **15 000 TEU**, reflecting current berth depth and crane limitations. In parallel, the industry has also seen an important step toward accountability with charges laid against former senior Transnet executives for alleged large-scale corruption during the state capture era. This development represents a modest yet significant step toward restoring trust and governance in South Africa's logistics sector.

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
vii. Other updates	11
2. Air Cargo Update	12
a. International air cargo	12
b. Domestic air cargo	12
3. National Trade Update.....	13
a. SARS merchandise trade statistics: May.....	13
4. Road and Regional Update	13
a. Lebombo border post update.....	13
b. SADC cross-border and road freight update.....	14
5. International Update	17
a. Global shipping industry	17
i. Global carrier schedule and capacity deployment	17
ii. Global container port throughput	19
iii. Global freight rates and container inventory	19
b. Global air cargo industry.....	20

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 23 to 29 June (measured in TEUs)

7-day flow reported (23/06/2025 – 29/06/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 990	34 927	↓18%
New Pier (Pier 1)	2 331	16 318	↑26%
Cape Town Container Terminal	1 681	11 765	↓21%
Ngqura Container Terminal	2 080	14 561	↓10%
Port Elizabeth Container Terminal	540	3 780	↓6%
Other	910	6 368	↓6%
Total	12 531	87 719	↓10%

Source: Calculated from TPT, 2025. Updated 29/06/2025.

A decreased average of ~**12 531 TEUs (↓10%)** was handled per day for the last week (23 to 29 June, Table 2) – but still above the projected average of ~**12 275 TEUs (↑2% actual versus projected)**.

For the coming week, a slightly increased average of ~**12 609 TEUs (↑1%)** is predicted to be handled (30 June to 6 July, Table 3). Despite another high volume week, port operations were still interrupted by adverse weather, empty berths, as well as continuous equipment breakdowns and shortages.

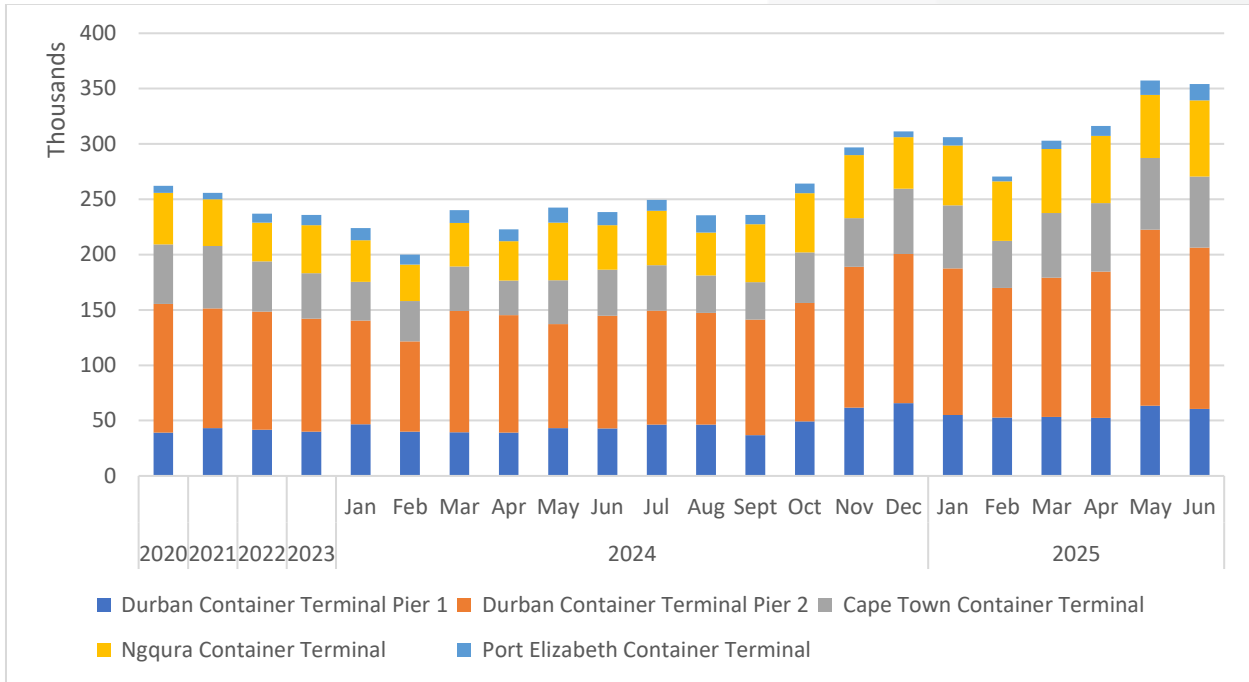
Table 3 – Container Ports – Weekly flow projected for 30 June to 6 July (measured in TEUs)

7-day flow projected (30/06/2025 – 06/07/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 408	37 856	↑8%
New Pier (Pier 1)	2 073	14 511	↓11%
Cape Town Container Terminal	1 755	12 283	↑4%
Ngqura Container Terminal	2 059	14 414	↓1%
Port Elizabeth Container Terminal	499	3 496	↓8%
Other	815	5 704	↓10%
Total	12 609	88 264	↑1%

Source: Calculated from TPT, 2025. Updated 29/06/2025.

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.

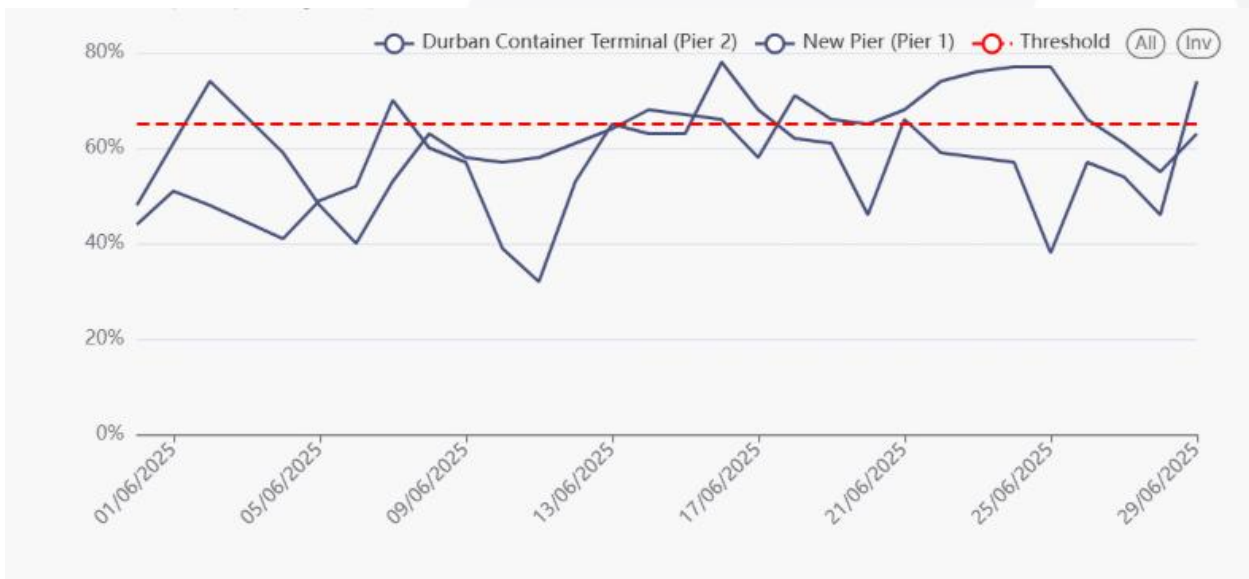
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 29/06/2025.

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

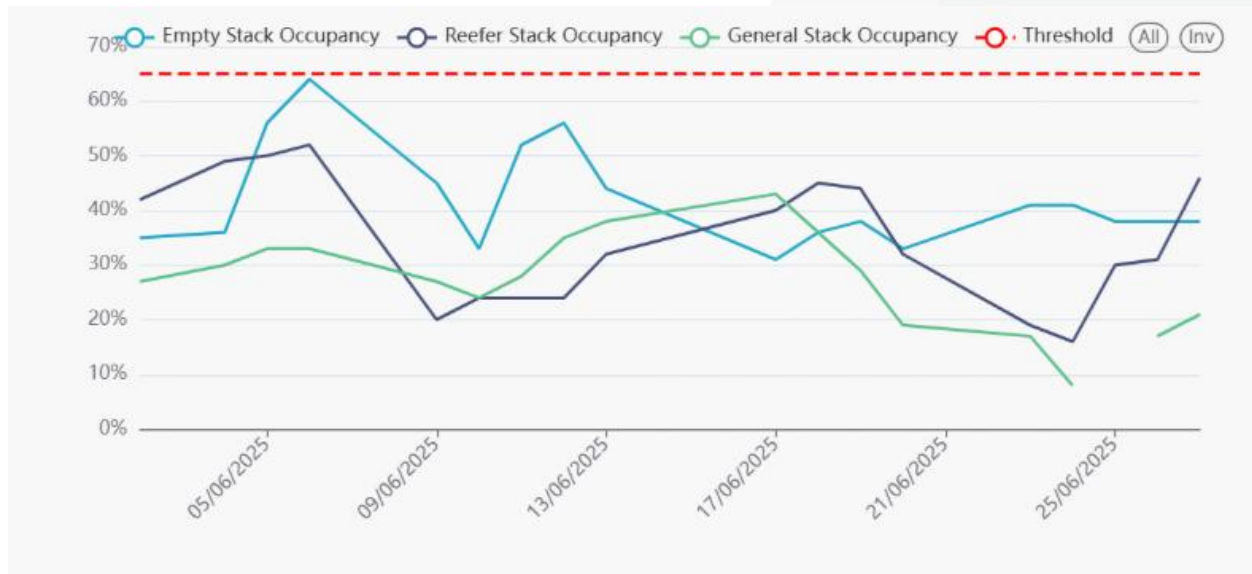
Figure 4 – Stack occupancy in DCT, general-purpose containers (1 June to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 29/06/2025.

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 June to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 29/06/2025.

b. Summary of port operations

i. Weather and other delays

- The Port of Cape Town conceded more than 30 operational hours to adverse weather this week.
- The main operational constraints in Durban proved to be equipment challenges and adverse weather.
- Empty berths, equipment challenges, and a power failure prevented optimal performance at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

ii. Cape Town

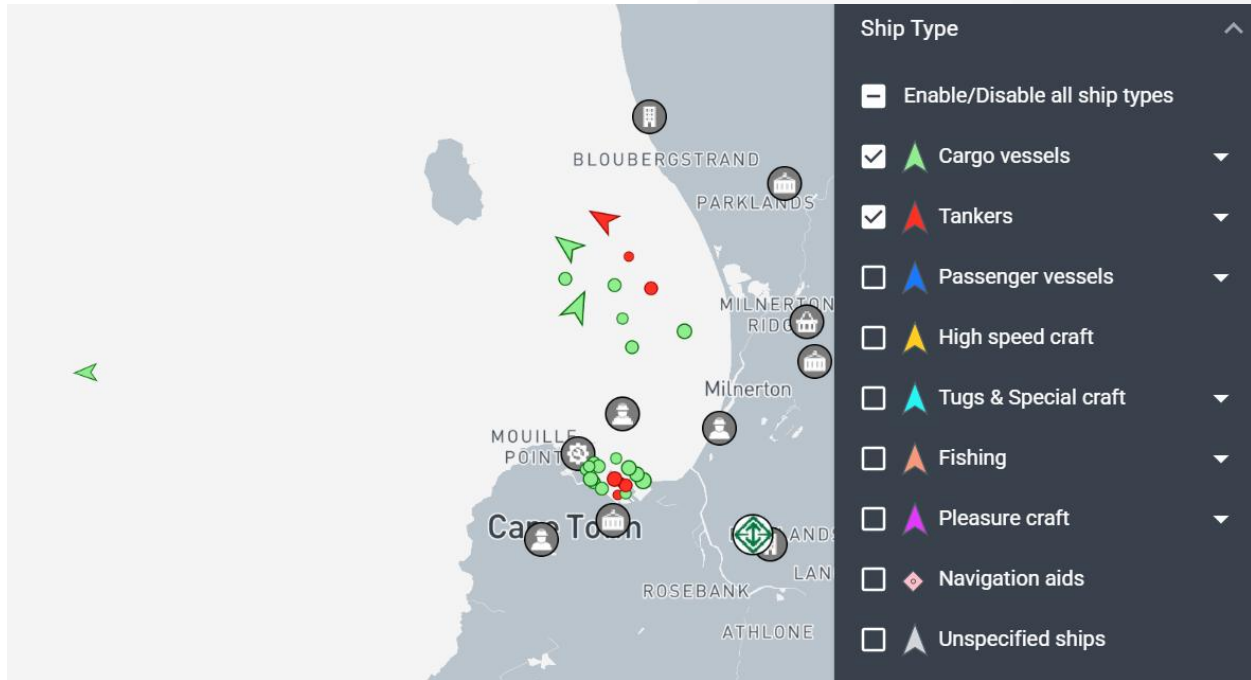
On Thursday, CTCT recorded one vessel at berth and one at anchor, as adverse weather and high swells proved to be the primary operational constraints at the port. On the landside, between Monday and Thursday, the terminal managed to service at least 2 483 trucks while handling approximately 45 rail units. On the waterside, the terminal executed approximately 2 832 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 17%, reefers at 31%, and empties at 38%**. Additionally, the terminal operated with **eight STS cranes, 22 RTGs, and 55 hauliers** towards the end of the week. Crane LC3 was out of commission during this time for planned maintenance operations. Between Wednesday and Thursday, the terminal lost around 21 hours due to strong winds.

The latest reports from Maersk suggest that the Maersk Florence’s omission of Cape Town has been retracted due to CTCT granting the vessel “berth on arrival” status. Thus, her Cape Town call has been reinstated after earlier communication suggesting that she would omit the port.

On Wednesday, CTMPT recorded one vessel at berth and none at outer anchorage. In the preceding 24 hours, the terminal successfully handled 2 853 tons on the waterside, despite operations being impacted by rainy weather for approximately six hours. On the landside, 186 trucks were processed during the same period. Stack occupancy was recorded at 3%% for general cargo, 6% for reefers, and 1% for empties. Towards the end of the week, the terminal operated with three cranes and four straddle carriers.

Between 16 and 22 June, the FPT terminal handled six vessels: three multi-cargo, one dry bulk, and two container vessels. Berth occupancy during this period was recorded at 59%. The terminal planned to handle nine more vessels between 23 and 29 June, with another seven vessels scheduled between 30 June and 6 July. Inclement weather, as well as the late arrival of cargo and transporters, accounted for the most significant operational constraints during this period.

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



Source: Marine Traffic. Updated 23/06/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, with one vessel at anchor. Stack occupancy was **57% for GP containers** and **22% for reefers**. Between Monday and Friday, the terminal executed at least 5 721 gate moves and 191 rail moves on the landside. The **average TTT** for the week was **~50 minutes (↓29%, w/w)** and a low average **staging time** of **~22 minutes (↓42%)**. Additionally, the terminal moved over 6 544 TEUs across the quay on the waterside during the same period. The terminal had **four STS cranes** and **16 RTGs** available towards the end of the week.

Pier 2 had four vessels on berth and one at anchorage on Thursday, as equipment breakdowns and adverse weather prevented optimal operational performance this week. Stack occupancy was recorded at **66% for GP containers** and **55% for reefers**. The terminal operated with **11 gangs** and moved over **18 100 containers** across the quay between Monday and Friday on the waterside. Approximately 15 975 gate moves were executed on the landside during the same period. The **average TTT** for the week was **~78 minutes (↓18%, w/w)** and an average **staging time** of **~100 minutes (↑45%)**. Approximately 2 226 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **70** and **75** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **83%** during this period. Towards the end of the week, the most notable crane absentees were Cranes 520, 522, 525 and 526.

Durban's MPT terminal recorded one vessel at berth on Wednesday and none at outer anchorage. Stack occupancy for containers was recorded at 34%, the reefer stack at 20%, and the breakbulk stack at 85%. In

the preceding 24 hours, 871 containers and 973 tons of break bulk were handled on the waterside. On the landside, 228 container trucks were serviced at a TTT of ~30 minutes. Additionally, 61 breakbulk trucks, containing 1 434 tons, were serviced. During this period, three cranes, seven reach stackers, seven forklifts, and 20 ERFs were in operation. The latest reports from TPT suggest that the fourth crane is only scheduled to return to service around 21 December.

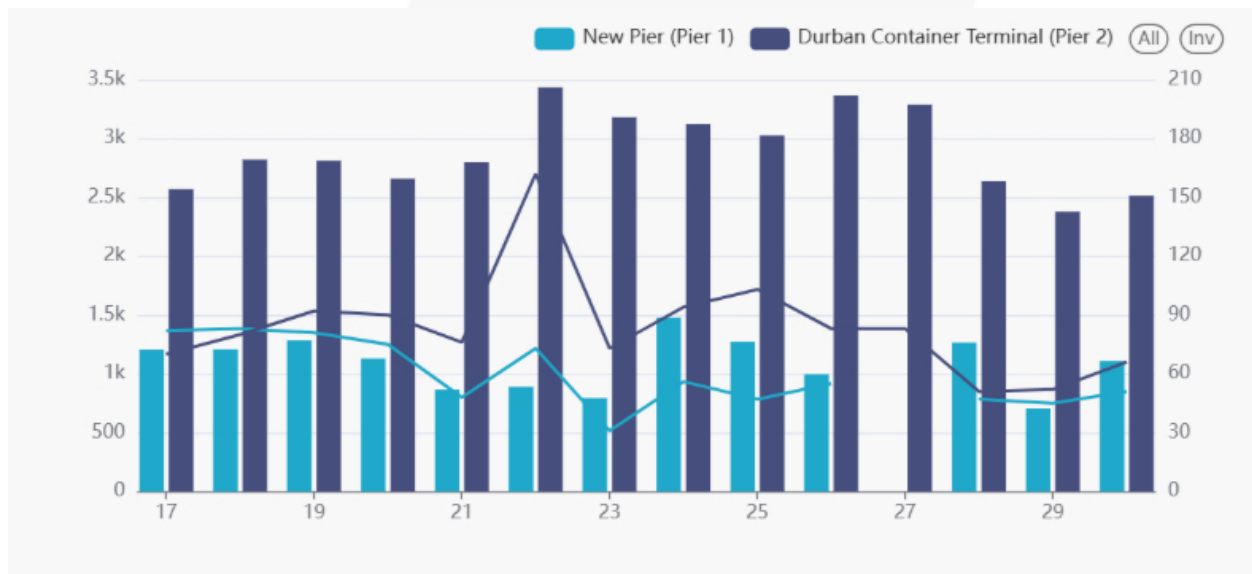
Between Tuesday and Wednesday, the Maydon Wharf MPT recorded one vessel at berth and zero at anchorage. On the waterside, the terminal managed to handle 2 225 tons, while 76 trucks, containing approximately 2 638 tons, were serviced on the landside. During the same period, the agri-bulk facility recorded one vessel at berth and none at anchor. The terminal managed to handle 1 363 tons on the waterside and zero trucks on the landside.

On Wednesday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with none at anchorage. In the preceding 24 hours, the terminal handled 1 749 road units and 298 units on rail on the landside while 1 320 units were handled on the waterside. Overall stack occupancy was 75%, 5% at Q&R, and 40% at G-berth. During this period, the terminal had 108 high-and-heavy (abnormal loads) on hand and managed to handle eight.

Bayhead Road remains the sole heavy goods vehicle (HGV) access route to the Island View precinct. Rehabilitation works on the road surface, stormwater drainage, and associated infrastructure commenced on 17 June. To accommodate the project, outgoing traffic has been diverted to the parallel by-pass road constructed following the 2022 floods, while incoming traffic is currently using the existing outgoing lanes on Bayhead. These traffic management measures, combined with elevated volumes at the container terminals, led to significant congestion, particularly in the week after works began. Ongoing issues such as truck breakdowns and illegal parking have contributed to backlogs; however, recent enforcement actions by the Durban Metro Police and Port Authority security have delivered some improvement in traffic flow.

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.

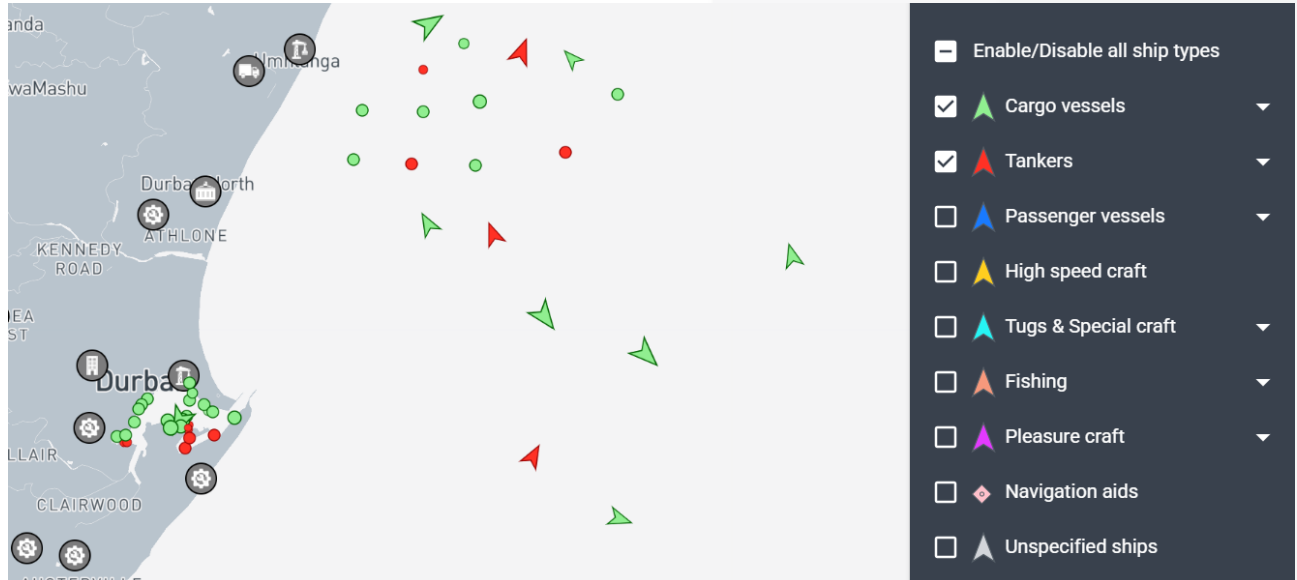
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 29/06/2025.

The queue of container vessels waiting outside Durban has decreased slightly from last week. On Monday evening (30 June), **no** container vessels were waiting outside at anchorage for Pier 1, **one** for Pier 2, and **one** for Point. The queue of dry (**seven**), liquid (**four**), and breakbulk (**two**) vessels has remained steady from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 23/06/2025 at 14:00.

iv. Richards Bay

On Wednesday, the Port of Richards Bay had three vessels at anchor and 13 on the berth, translating to six vessels at DBT, three at MPT, two at RBCT, and two at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources towards the end of the week. The daily average coal throughput for the week decreased again to around **119 000 tons** (↓**31%**, w/w), as some high days were offset with some low days. A low average of **13 trains** (down by **eight** from last week) were serviced on the landside, significantly below the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded three vessels on berth and zero at anchor, with one vessel drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. For the majority of the week, the Ports of PE and Coega shared a pilot boat due to some challenges with their waterside equipment. Stack occupancy figures were recorded at 29% for reefers, 28% for reefer ground slots, and 10% for the general stack. Despite having an empty berth for 19 hours during this period, the terminal handled approximately 2 600 TEUs and 286 reefers on the waterside. Approximately 628 trucks were processed on the landside at a TTT of ~29 minutes. Towards the end of the week, the terminal had seven STS cranes, 25 RTGs, and 46 hauliers in service.

On Thursday, GCT had one vessel 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, 401 trucks were processed at a TTT of ~27 minutes on the landside, while 310 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 52% for the general stack, 47% for reefers, and

50% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and six straddles in service.

On Thursday, the Ro-Ro terminal had one vessel on berth and one at outer anchorage. In the 24 hours before, the terminal handled 2 753 units resulting in a stack occupancy figure of 44%.

Lastly, TNPA has issued a request for proposals (RFP) for the appointment of a terminal operator to fund, design, develop, construct, operate, maintain and transfer a liquid bulk terminal at the Port of Ngqura, for a concession period of 25 years.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR indicate that intermittent cable theft is ongoing on the central corridor; however, trains continue to operate despite the incidents that have occurred. Additionally, delays of up to 12 hours were experienced over the weekend (21 & 22 June) on the line between Johannesburg and Mafikeng due to “diesel breakdowns.” Towards the end of the week, DCT Pier 2 had 1 338 ConCor units on hand with a dwell time of 120 hours and 364 over-border units with a dwell time of 74 days.

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



Source: Calculated using data from Transnet, 2024. Updated 29/06/2025.

In the last week (23 to 29 June), rail cargo on the ConCor line out of Durban was reported at **3 422** containers, up by **↑4%** from the previous week’s **3 294** containers.

vii. Other updates

Due to the recent conflict in the Middle East, Maersk announced a temporary suspension of vessel calls to the Port of Haifa. However, with the prospect of a current cease-fire agreement bringing de-escalation to the conflict, Maersk has decided to resume vessel calls to the Port of Haifa, and acceptance for both import and export cargo is now open.

Additionally, the latest reports from Maersk suggest that the CMA GCM Mekong 527N will omit Port Louis for schedule recovery. The vessel will proceed directly to Tanjung Pelepas after completing operations in Durban. All exports and transhipments from Port Louis will be amended to the Maersk Felixstowe 528N, and all exports from Durban will be amended to tranship via Tanjung Pelepas on CMA CGM Mekong 527N.

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 beginning 16 June. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in June 2024 averaged ~845 561 kg daily.

Table 4 – International inbound and outbound cargo from OR Tambo

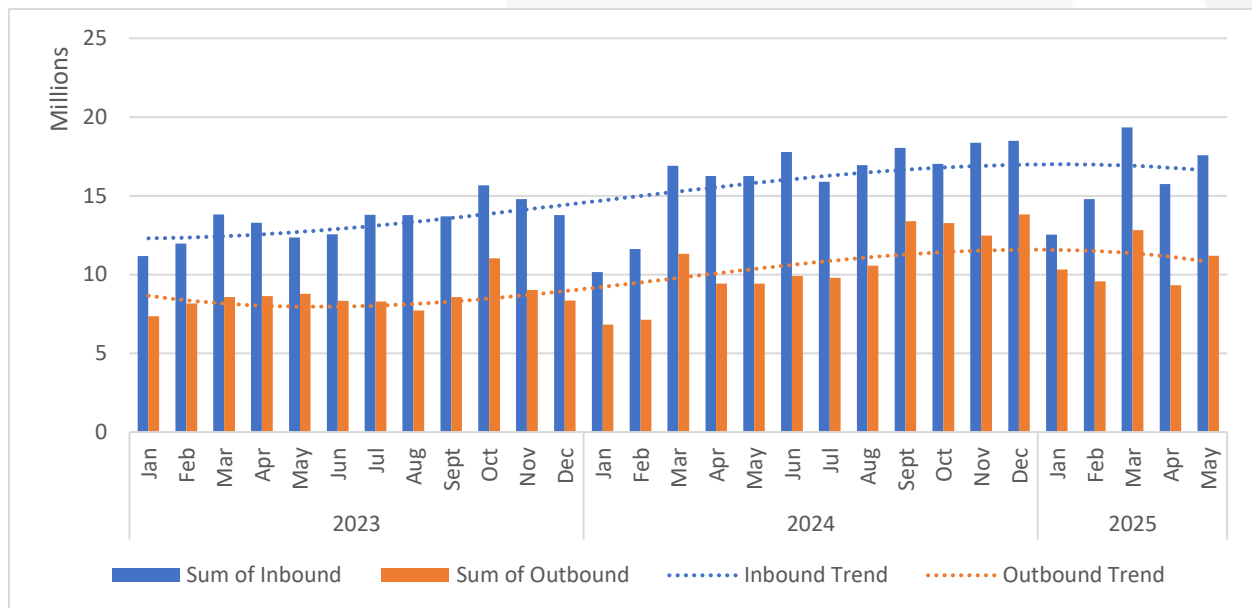
Flows	16-Jun	17-Jun	18-Jun	19-Jun	20-Jun	21-Jun	22-Jun	Week
Volume inbound	380 009	269 466	535 832	273 233	323 776	333 183	1 681 121	3 796 620
Volume outbound	94 539	110 849	164 090	167 028	184 416	171 758	1 209 093	2 101 773
Total	474 548	380 315	699 922	440 261	508 192	504 941	2 890 214	5 898 393

Courtesy of ACOC. Updated: 29/06/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to ~540 000 kg inbound (↓10%, w/w) and ~300 000 kg outbound (↓7%). Despite another weekly reduction, cargo is trending at the same level as last year (↓0,3%, y/y), but below the comparative levels of pre-pandemic 2019 (↓7%).

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

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

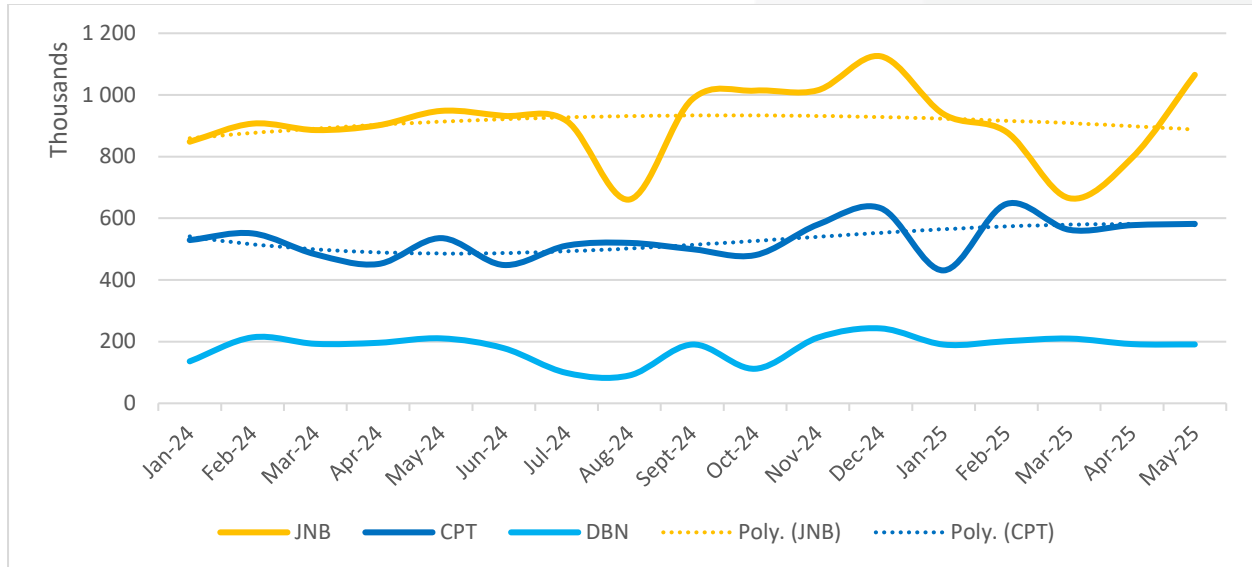


Calculated from ACOC. Updated: 29/06/2025.

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: 29/06/2025.

3. National Trade Update

a. SARS merchandise trade statistics: May

SARS released its latest "Merchandise Trade Statistics" for May⁶, revealing a preliminary monthly trade surplus of **R21,7 billion**. Monthly trade data indicates that exports increased by **↑6,3%** from April (m/m) to **R175,7 billion**, while imports increased by **↑1,2%** (m/m) to **R154,1 billion**. The year-to-date trade surplus of **R60,3 billion** is slightly lower than the **R63,9 billion** surplus in May 2024.

Regionally, trade with BELN countries for February resulted in a trade surplus of **R11,7 billion**, derived from exports of **R17,2 billion** and imports of **R5,6 billion**. Exports to our neighbouring countries increased by **↑4,6%** (m/m) between April and May 2025, while imports decreased by **↓2,2%** (m/m) over the same period. Cumulative figures for the year demonstrate a growing trade balance with BELN countries, increasing from **R53,8 billion** in 2024 to **R55 billion** in 2025. Excluding BELN countries, South Africa's trade balance with all other trading partners recorded a net surplus of **R10 billion**.

4. Road and Regional Update

a. Lebombo border post update

In the last week (23 to 29 June), cargo movements along the N4 corridor increased slightly for road transport, as the rail shutdown has led to a modal shift onto road. The following notes summarise the recent developments:

- Truck volumes through the border post at **1 653 HGVs per day (↑2%, w/w)**.
- Queue times increased to an average of **4,0 hours (↑48%)** at the border, as the average processing time also increased to around **3,6 hours (↑50%)** per crossing.
- Rail cargo is set to pick up again, as operations were reintroduced by the end of the week.

⁶ SARS. 30/06/2025. [Trade Statistics: May 2025](#).

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

Table 5 – Lebombo border post update

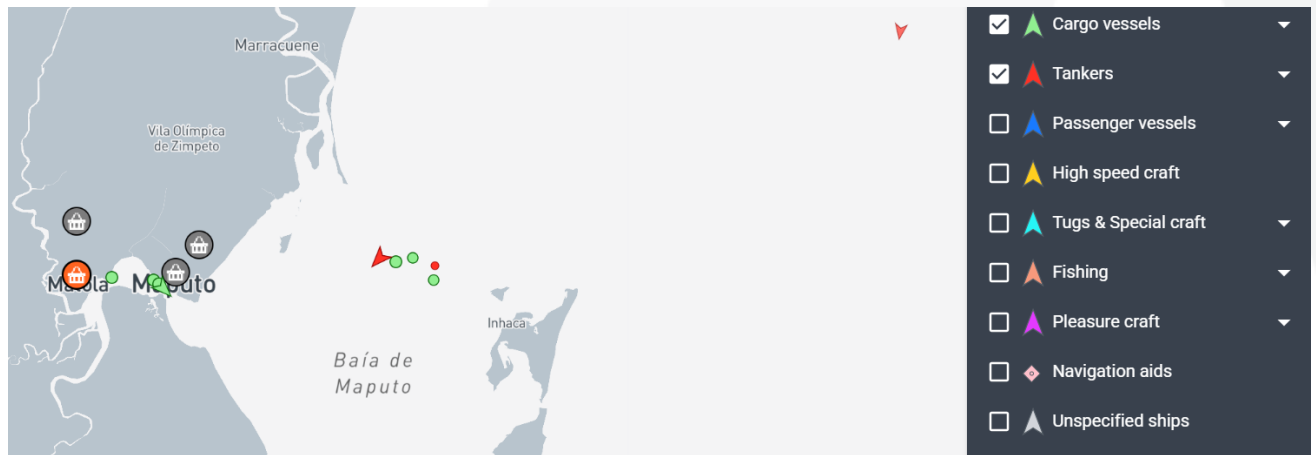
Date 06h00 Daily	Total Trucks Entering KM4	Total Trucks Exit KM4	Mineral Trucks	General Cargo (incl. critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Total Trucks inside KM4 staging	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo
Design Capacity	1 500	1 500	1 200	200	n/a	50	50	2 000	20	10	6	4
23-Jun-25	1 643	1 724	1 504	131	15	72	2	200	0			
24-Jun-25	1 649	1 615	1 246	209	58	79	23	231	0			
25-Jun-25	1 821	1 820	1 409	286	39	78	8	251	0			
26-Jun-25	1 733	1 703	1 352	182	54	76	36	324	0			
27-Jun-25	1 603	1 481	1 066	292	55	65	3	371	1			1
28-Jun-25	1 466	1 506	1 028	317	46	60	55	308	5		4	1
29-Jun-25	1 658	1 673	1 364	172	30	58	49	315	0			
% of design capacity	110%	110%	107%	114%	n/a	139%	50%	14%	4%	#DIV/0!	67%	25%
% change (d/d)	13%	11%	33%	-46%	-35%	-3%	-11%	2%	n/a	n/a	n/a	n/a

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 29/06/2025.

* = not reported

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

Figure 12 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 23/06/2025 at 14:00.

b. SADC cross-border and road freight update

The following developments around cross-border road freight in South Africa and the broader SADC region are noteworthy:

- Overall, the average queue time increased by **10 minutes** from last week, while transit time decreased by around **three-quarters of an hour**.
- The median border crossing times at South African borders decreased by **an hour and a quarter**, averaging **~9,6 hrs (↓11%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs (no change)**.

1. **Border operations – Zimbabwe Revenue Authority (ZIMRA)**
 - a. Anti-smuggling initiative involving **100% cargo scanning** at key borders (Beitbridge and Chirundu) has resulted in long queues and substantial increases in crossing times.
 - b. The cost of crossing at Beitbridge reportedly is **more than double** that of Kazungula.
2. **Zimbabwe – Road Incidents**
 - a. **Harare area (Northwest):**
 - i. Truck accident ~20 km northwest of Harare at 10:39 AM.
 - ii. Both lanes initially blocked; a single lane was later opened for both directions.
 - iii. Authorities advised extreme caution in the area.
 - b. **Between Chegutu and Kadoma (west of Harare):**
 - i. Truck overturned, blocking both lanes.
 - ii. Traffic diverted via Vergas.
 - iii. Delays expected; caution urged.
3. **Cobalt export ban – Zimbabwe**
 - a. The temporary suspension on all cobalt derived from mining (effective from 22 February 2025) has been extended by three months due to the rationale of excess market stock.
 - b. Authorities will review the policy before the extension period ends.

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

Table 6 – Delays⁷ summary – South African borders (both directions)

Border Post	Direction	HGV ⁸ Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	473	22,2	7,2	26,0	14 190	3 311
Beitbridge	Zimbabwe-SA	527	11,1	2,3	12,5	15 810	3 689
Groblersbrug	SA-Botswana	208	17,1	1,3	17,1	6 240	1 456
Martin’s Drift	Botswana-SA	217	2,9	0,3	2,5	6 510	1 519
Kopfontein	SA-Botswana	203	7,9	1,4	7,5	6 090	1 421
Tlokweng	Botswana-SA	20	0,7	0,2	0,4	600	140
Vioolsdrift	SA-Namibia	30	4,4	1,5	4,3	900	210
Noordoewer	Namibia-SA	20	2,8	0,4	2,5	600	140
Nakop	SA-Namibia	30	2,9	0,2	2,5	900	210
Ariamsvlei	Namibia-SA	20	1,3	0,4	1,2	600	140
Skilpadshek	SA-Botswana	252	6,5	2,0	6,3	7 560	1 764
Pioneer Gate	Botswana-SA	60	0,0	0,0	0,0	1 800	420
Lebombo	SA-Mozambique	1 626	4,0	1,0	3,6	48 780	11 382
Ressano Garcia	Mozambique-SA	1 563	1,0	0,2	1,0	46 890	10 941
Sum/Average		5 249	6,1	1,3	6,2	157 470	36 743

Source: TLC, FESARTA, & Crickmay, week ending 22/06/2025.

⁷ Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.

⁸ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

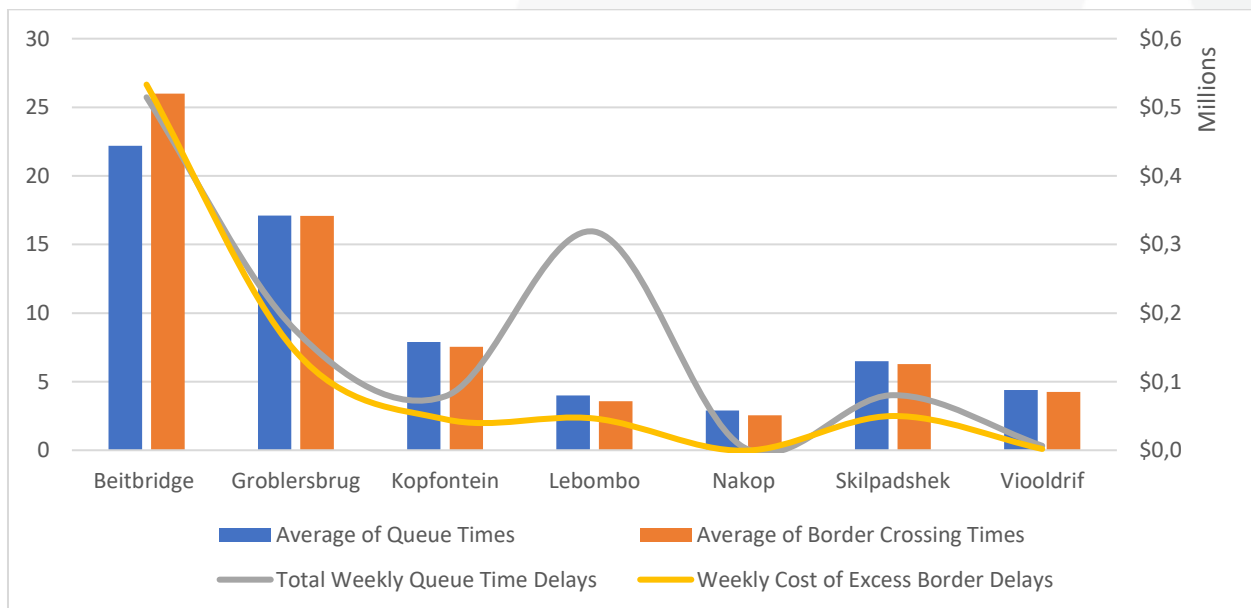
Table 7 – Delays summary – Corridor perspective

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	16,3	3,4	16,2	9 600	2 240
Central Corridor	798	0,5	0,1	0,5	23 940	5 586
Dar Es Salaam Corridor	1 819	10,6	0,9	10,5	54 570	12 733
Maputo Corridor	3 189	2,5	0,6	2,3	95 670	22 323
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 605	9,9	1,4	10,1	108 150	25 235
Northern Corridor	2 817	0,9	0,1	0,8	92 520	21 588
Trans Caprivi Corridor	342	2,8	0,7	2,5	10 260	2 394
Trans Cunene Corridor	100	2,9	0,6	2,6	3 000	700
Trans Kalahari Corridor	116	2,7	0,5	2,6	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	13 333	4,8	0,7	4,8	408 000	95 200

Source: TLC, FESARTA, & Crickmay, week ending 22/06/2025.

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

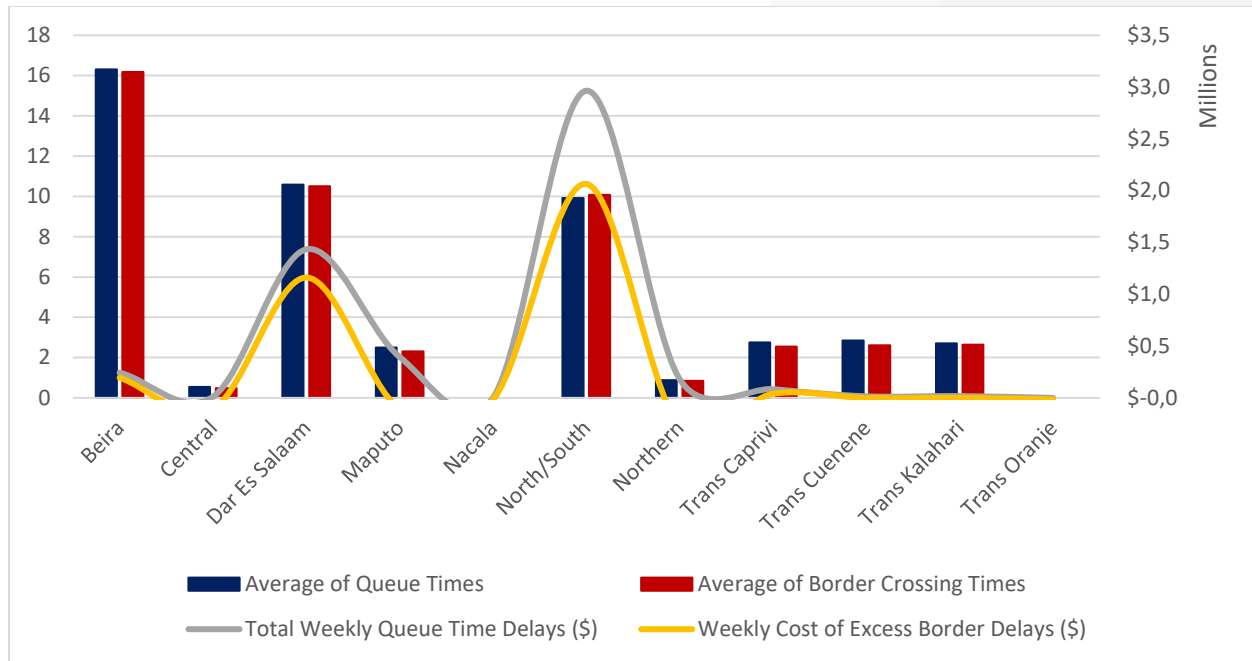
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 22/06/2025.

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 22/06/2025.

In summary, cross-border queue time averaged **~4,8 hours** (up by **~0,1 hours** from the previous week's **~4,7 hours**), indirectly costing the transport industry an estimated **\$5,3 million (R97 million)**. Furthermore, the week's average cross-border transit times also hovered around **4,8 hours** (down by **~0,8 hours** from the **~5,6 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$2,9 million (R53 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$8,3 million (R150 million)**, down by **~R2 million** or **↓1,7%** from **~R152 million** in the previous report).

5. International Update

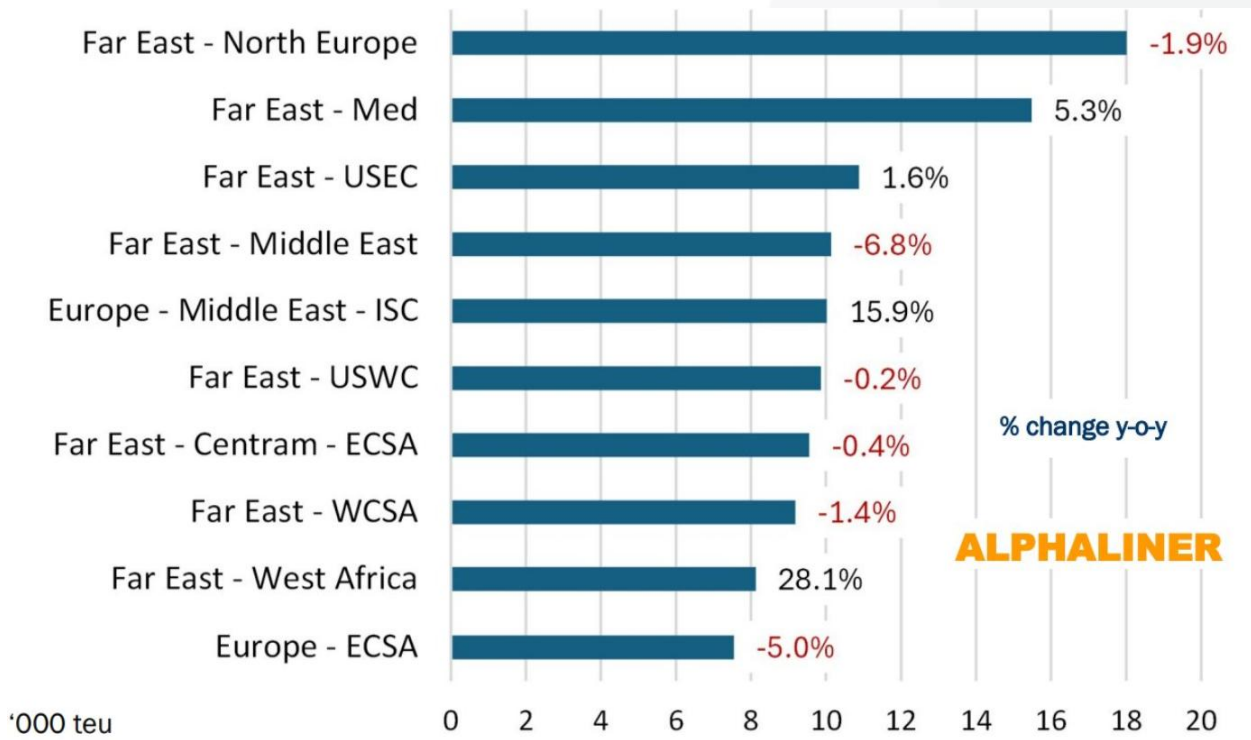
The following section provides some context around the global economy and its impact on trade, mainly an update on (a) the global shipping industry and (b) the global aviation industry.

a. Global shipping industry

i. Global carrier schedule and capacity deployment

Global carriers continue to deploy larger ships on traditionally smaller trades, with average vessel sizes on the Far East–West Africa route jumping **↑28%** year-on-year as MSC shifts **24 000 TEU vessels** from the Far East–North Europe corridor. This strategic redeployment is mirrored on the Europe–Middle East–Indian Subcontinent trade, where over **12 500 TEU units** in service have doubled in a year. Reflecting these changing scheduling dynamics, Ngqura will this week host its first ultra-large container vessel (ULCV), the *MSC Nicola Mastro*, signalling South Africa's integration into the trend of accommodating larger ships on new routes.

Figure 15 – Trades with the highest average vessel size (TEU thousands)



Source: [Alphaliner](#)

This shift toward larger vessels also underscores the importance of understanding the concept of empty berths in our local context. Even as South African ports prepare to welcome ULCVs, berth occupancy depends not only on vessel size but also on coordinated schedules, terminal capacity, and the readiness of inland logistics. Empty berths often arise from mismatches between shipping line rotations, cargo demand variability, and operational constraints like equipment downtime or weather disruptions. Aligning these factors is essential to ensure that upgraded capability translates into reliable, efficient throughput and sustainable growth in containerised trade.

Given the current geopolitical landscape, it is worth noting that CMA CGM has resumed and expanded its Suez/Red Sea transit, leading the month of June with 12 container-ship passages and capitalising on a temporary 15% Suez toll discount, while most other top carriers remain cautious amid regional tensions.⁹ This cautious redeployment highlights the growing geopolitical friction affecting vessel routing through the Strait of Hormuz and Bab el-Mandeb, incentivising some carriers to reroute via the Cape of Good Hope.

Lastly, in summarising the rest of the industry, the transpacific market is facing signs of an early peak season slowdown, as US inventories soften, with spot rates plunging and carriers preparing blank sailings despite record vessel capacity scheduled for July.¹⁰ European port congestion remains a challenge, but overall schedule reliability has improved to its highest level in over two years.¹¹ Meanwhile, the industry is reminded of maritime risk with the *Morning Midas* car carrier sinking 21 days after fire damage.¹²

⁹ Linerlytica. 30/06/2025. [Market Pulse – Week 26.](#)

¹⁰ Van Marle, G. 02/07/2025. [Transpacific set to see record level of ship capacity in July as rates crash.](#)

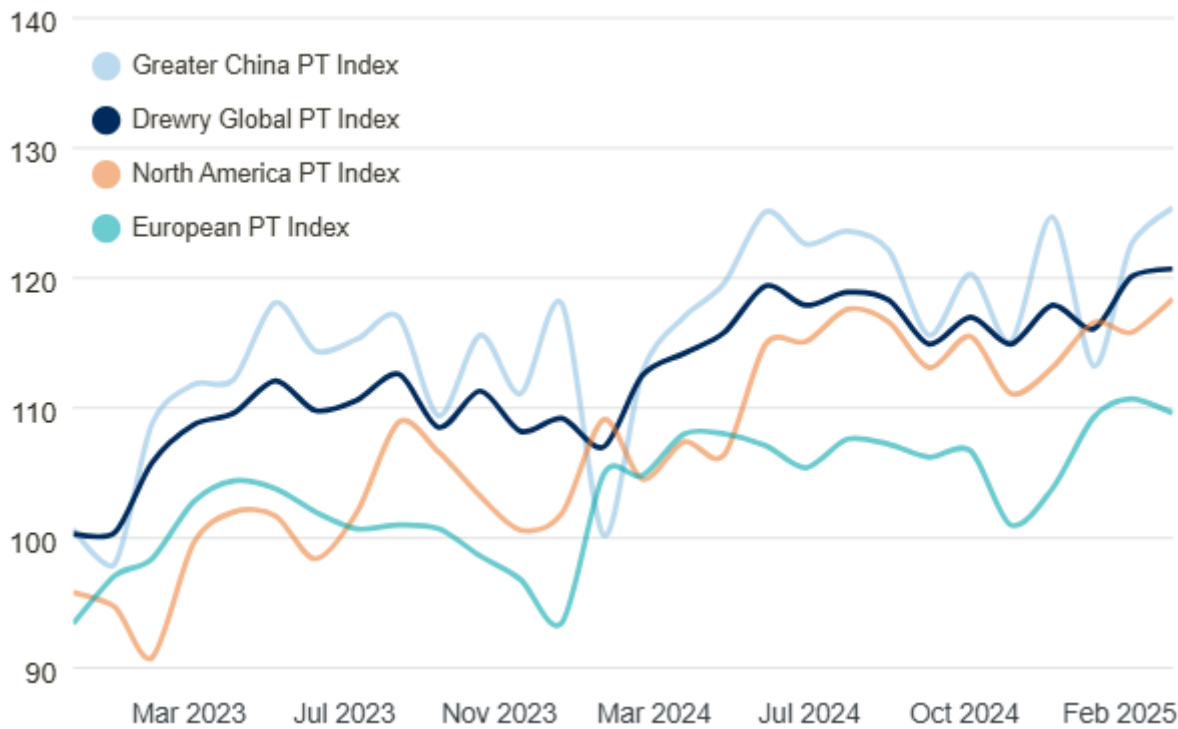
¹¹ Van Marle, G. 30/06/2025. [Schedule reliability on the rise despite European port congestion.](#)

¹² Whiteman, A. 24/06/2025. [Car-carrier Morning Midas sinks 21 days after fire damage.](#)

ii. Global container port throughput

Drewry’s “Global Container Port Throughput Index” increased **↑0,5%** (m/m) and **↑5,6%** (y/y) in April. Meanwhile, the rolling 12-month growth rate for global port handling remained steady at **↑6,5%**.¹³ On a YTD (Jan-Apr) basis, port volumes have risen most strongly in North America (**↑9,7%**) and the Middle East and South Asia (**↑9,6%**), with Greater China (**↑7,5%**) not too far behind. Throughput handled in Africa is down by a significant **↓12,1%** (m/m), but up by **↑4,1%** year-on-year.

Figure 16 – Drewry Global Container Port Throughput Index (PTI)



Source: [Drewry](#)

iii. Global freight rates and container inventory

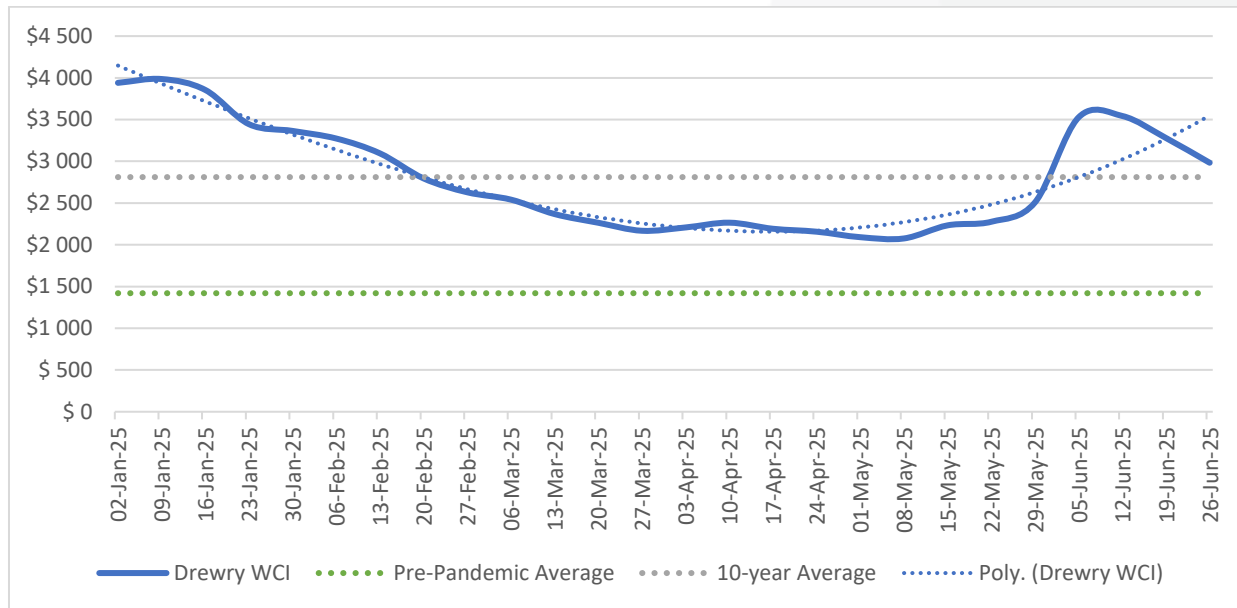
Drewry’s “World Container Index” declined by **↓9%** (or **\$296**) to **\$2 983 per 40-ft container**¹⁴, marking the second consecutive weekly drop following five weeks of gains. While the Transpacific route saw the sharpest decline with a **↓16%** fall, Asia–Europe rates edged up slightly (**↑1%**), and Transatlantic rates remained relatively flat. Meanwhile, the *Harper Petersen Index* (Harpex) traded around **2 161 points** on Friday.¹⁵

¹³ Drewry. 27/06/2025. [Port Throughput Indices](#).

¹⁴ Drewry. 26/06/2025. [World Container Index](#).

¹⁵ Harpex. 27/06/2025. [Harper Petersen & Co Charter Rate Index](#).

Figure 17 – World Container Freight Index (\$ per 40ft)

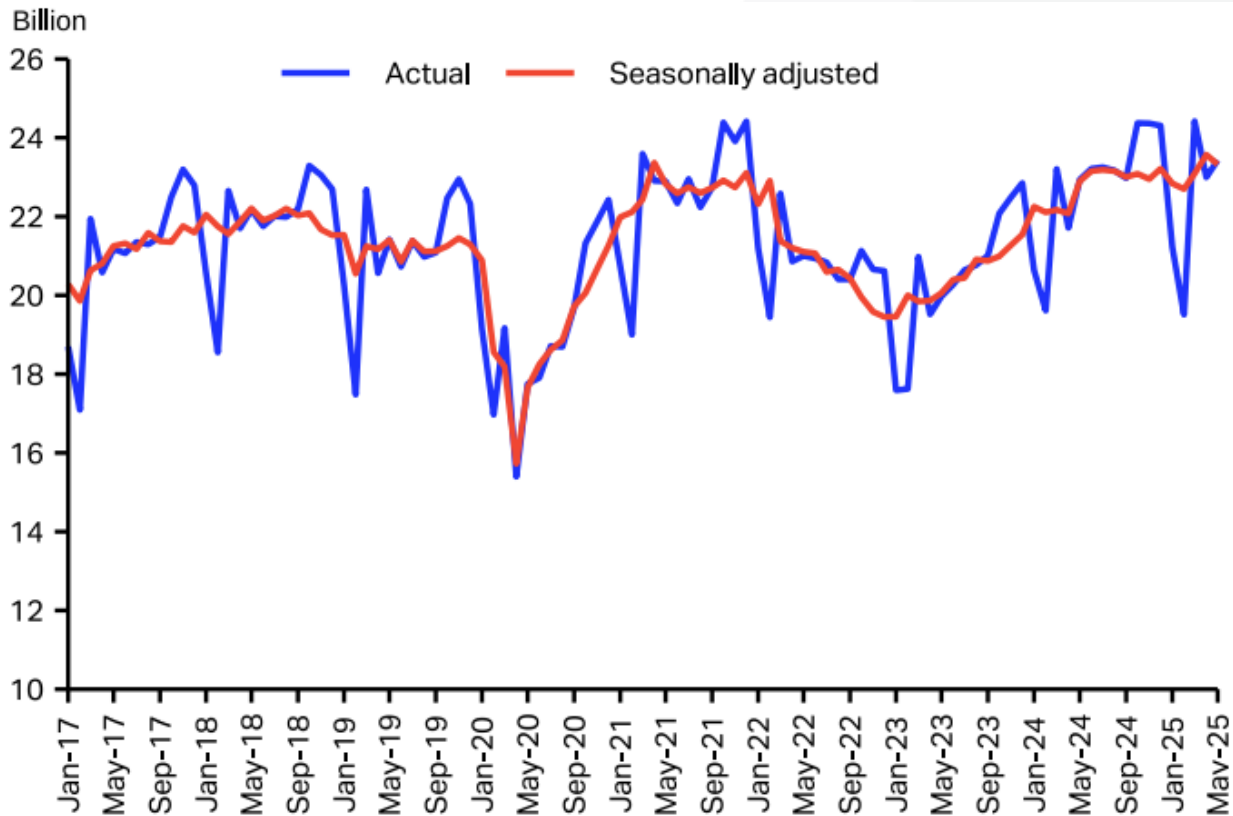


Source: Calculated from [Drewry](https://www.drewry.com)

b. Global air cargo industry

In May 2025, global air cargo demand (CTK) increased by **↑2,2%** year-on-year; however, seasonally adjusted CTKs contracted by **↓1%** (m/m). International CTK rose by **↑3%** (y/y), with most regions and routes posting single-digit gains, but Africa was down by **↓2,2%** (y/y). Available cargo capacity (ACTK) expanded by **↑2%** (y/y), resulting in a steady cargo load factor of **44,5%** (**↑0,1%**). Jet fuel prices remained **↓18,8%** lower (y/y), while average cargo rates fell **↓3,7%** (m/m) in May and **↓2,9%** (m/m), reflecting seasonal demand and tight capacity on key lanes. This slowing momentum is due to the unwinding of the front-loading effect as the new tariffs come into force.

Figure 18 – Industry CTKs (billions)



Source: [IATA](#)

In the high-frequency metrics from World ACD, global air cargo tonnages rose **↑2%** week-on-week and **↑5%** year-on-year. Middle East and South Asia (MESA) volumes partially rebounded (**↑10%**, w/w) after sharp declines related to the Eid holiday and conflict earlier in June. Traffic from Pakistan (**↑32%**), Bangladesh (**↑18%**), and the Levant (**↑14%**) saw notable recovery. MESA-Europe lanes rose **↑17%** (w/w), while intra-MESA and MESA–Asia Pacific flows improved by **↑12%** and **↑11%**, respectively. African outbound volumes rose **↑4%** (w/w).

Figure 19 – Region to region: chargeable weight, and rates (last 2 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		+1%	+6%		-8%	-6%		+0%	+7%
Asia Pacific		-1%	+2%		-4%	+5%		-1%	-3%
C. & S. America		+0%	+1%		-1%	+6%		-1%	-1%
Europe		-0%	+1%		-7%	-8%		+1%	+2%
M. East & S. Asia		-1%	+3%		-13%	-15%		+3%	-10%
North America		+3%	+2%		+5%	-1%		+2%	+1%
Worldwide		+0%	+2%		-4%	-1%		-0%	-1%

Source: [World ACD](#)

Average global rates edged up $\uparrow 1\%$ (w/w) to **\$2,43/kg** (but remained down by $\downarrow 1\%$ year-on-year). Flight operations in the Gulf are resuming gradually after the **Israel–Iran ceasefire**, though normal schedules may take weeks to restore.

ENDS¹⁶

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.*