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Cargo Movement Update #259[1]

Date: 9 November 2025

Weekly Snapshot

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

Flows	Current[2]			Previous[3]			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	36 484	41 565	**78 049**	38 462	43 819	**82 281**	↓5%
Air Cargo (tons)	5 728	3 297	**9 025**	4 818	2 991	**7 809**	↑16%

Monthly Snapshot

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

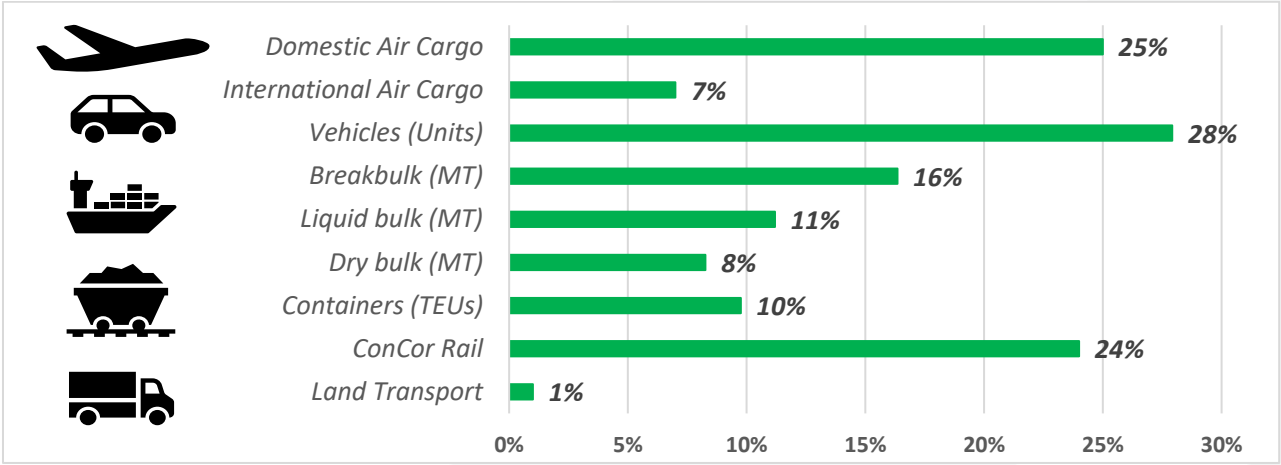
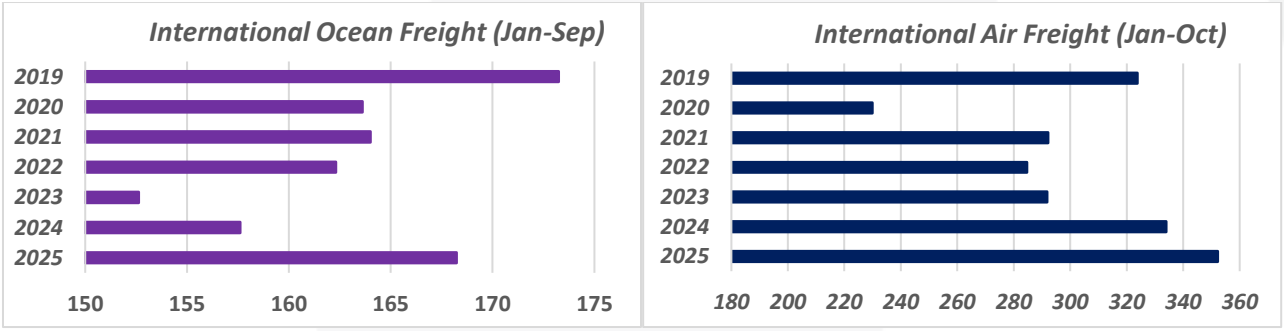


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~11 150 TEUs** was handled per day, with **~11 610 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 573** containers, down by ↓12% from last week.
- Cross-border queue: **↑0,2 hrs**; transit: **↑0,3 hrs**; SA borders: **~11,3 hrs** (**↑11%**); SADC: **~5,2 hrs** (**↑4%**).
- After records in August, global container throughput is down by **↓5,6%** (m/m), but still up by **↑5%** (y/y).
- Global (driven by GRIs) rates rose for a 4th consecutive week and are up by **↑8%** (or **$137**) to **$1 822/40ft**.
- Global air cargo tonnages are up **↑4%** (y/y) and on track for **↑4% full-year growth**; rates to **$2,48/kg**.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *259th* 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. Air: Oct vs. Oct; others: Sept. vs Sept.
[5] Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **11 150 TEUs** was handled daily, a decrease from **11 754 TEUs** the previous week.

Port operations were mainly characterised by adverse weather, vacant berths, as well as equipment challenges and shortages. To contextualise this, over 40 operational hours were conceded in Cape Town this week due to adverse weather, as equipment challenges and inclement weather prevented optimal performance in Durban. Vacant berths, equipment challenges, and adverse weather ensured operational delays at our Eastern Cape Ports, while poor weather conditions proved to be the primary operational constraint at the Port of Richards Bay. The latest reports from TFR suggest that the line between City Deep and Mafikeng reopened after the derailment and floods but remained congested for the most significant part of the week due to backlogs. Congestion is expected to ease around 9 November. No major incidents were reported on the ConCor or the Central Corridor this week.

Global container trade softened in September, with throughput down **↓5,6%** (m/m) but still 5 % higher (y/y), and the global price index declining **↓5,6%**. Sub-Saharan Africa saw mixed performance, with imports up **↑1,4%** and exports down **↓11,6%**. Freight rates remain under pressure after a failed November GRI, while Europe's congestion supports firmer pricing. MSC surpassed **7 million TEU**, solidifying its **21% global share**. Tanker markets surged, with VLCC rates topping **$100 000 per day**, and easing Red Sea tensions improved regional stability.

International air cargo volumes surged to record levels in October, exceeding **44 million kg** — the highest since records began — driven by sharp monthly increases at Johannesburg (**↑9%**) and Cape Town (**↑42%**), which also rose year-on-year by **↑6%** and **↑12%**, respectively. Durban saw only a marginal monthly decline (**↓1%**) and remains down **↓15%** year-on-year, while cumulative volumes for 2024 are still tracking approximately **↑5,4%** higher than last year. For the week, air cargo increased substantially as the daily average of air cargo handled amounted to **~818 000 kg** inbound (**↑19%**, w/w) and **~471 000 kg** outbound (**↑10%**). Consequently, the current levels continue to trend significantly above last year's level (**~↑31%**) and the comparative levels of pre-pandemic 2019 (**~↑30%**).

Domestic air cargo volumes also rose sharply across all major terminals in October, with Johannesburg up **↑17%** (m/m) and **↑14%** (y/y), Cape Town up **↑15%** and **↑32%** respectively, and Durban posting a modest **↑4%** monthly gain but an exceptional **↑92%** increase compared to last year. Overall, domestic throughput recorded one of its strongest months on record, reflecting broad-based growth across the network.

Global air cargo volumes remained robust in late October, up **↑4%** (y/y) and **↑8%** (m/m), with Asia Pacific and Europe leading the rebound. Rates edged **↑4%** higher month-on-month to **$2,48/kg**, though still **↓5%** below last year, reflecting strong demand amid steady capacity growth and ongoing regional rate volatility.

Heavy goods vehicle (HGV) traffic through South Africa's main border posts rose by **↑6%** (m/m) in October, driven primarily by sharp increases at **Beitbridge** (**↑21%**) and **Ramatlhabama** (**↑38%**), despite a modest decline at **Lebombo** (**↓2%**).

Concerning weekly movements, trade along the N4 corridor decreased significantly for road transport. Reporting for rail transport was sparse. Truck volumes through the border post decreased to around **1 316 HGVs per day** (**↓11%**, w/w). Queue times increased slightly to an average of **~6,5 hours** at the border. The average processing time increased slightly to an average of **~6,3 hours** per crossing.

In the SADC region, average cross-border road transport times – on average – increased this week. Overall, the average queue time also increased by approximately **a quarter of an hour** from last week, while transit time decreased by the same magnitude. The median border crossing times at South African borders increased by roughly **an hour and a quarter**, averaging **~11,3 hrs** (**↑11%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) also increased by around **a quarter of an hour**, averaging **~5,2 hrs** (**↑4%**). This week, on average, three SADC borders took around a day to cross, namely Beitbridge, Forbes and Kasumbalesa (the worst affected, taking nearly **two days** from the **Zambian side**). Other developments of note include congestion at **(1)** Beitbridge and **(2)** Kazungula.

In summarising this edition, domestically, operational reliability across South Africa's ports improved slightly, with gains in vessel turnaround and rail flows signalling early progress in ongoing reform efforts. Yet, chronic congestion, weather disruptions, and equipment shortages are not yet matters of the past. Against this backdrop, renewed focus on structural restructuring, port competition, and private participation remains vital. With the 2025 worldwide container forecast likely falling within the **↑3,2%-4%** range, South Africa's port system must ensure that it does everything in its collective power to match and indeed exceed these targets. As trade and logistics continue to underpin South Africa's growth ambitions, a coherent, data-driven strategy integrating public and private actors will be essential to unlock efficiency, attract investment, and restore global competitiveness in the freight system.

Contents

1. Ports Update

This section provides an overview of the flow of containerised cargo through our commercial ports.

a. Container flow overview

The following tables indicate the container flows reported for the last seven days. The reporting aligns with TPT's cycle, which runs from Monday to Sunday.

Table 2 – Container Ports – Weekly flow reported for 3 to 9 November (measured in TEUs)

7-day flow reported (03/11/2025 – 09/11/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 953	34 671	↓4%
New Pier (Pier 1)	2 127	14 889	↓9%
Cape Town Container Terminal	1 330	9 311	↓28%
Ngqura Container Terminal	1 998	13 989	↑16%
Port Elizabeth Container Terminal	35	242	↓63%
Other	707	4 947	↑14%
Total	**11 150**	**78 049**	↓5%

Source: Calculated from TPT, 2025. Updated 09/11/2025.

A decreased average of **~11 150 TEUs** (↓5%) was handled per day for the last week (*3 to 9 November, Table 2*). Throughput was consequently below the projected average of **~11 610 TEUs** (↓4% actual versus projected).

For the coming week, an increased average of **~11 610 TEUs** (↑4%) is predicted to be handled (*10 to 16 November*, *Table 3*).

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

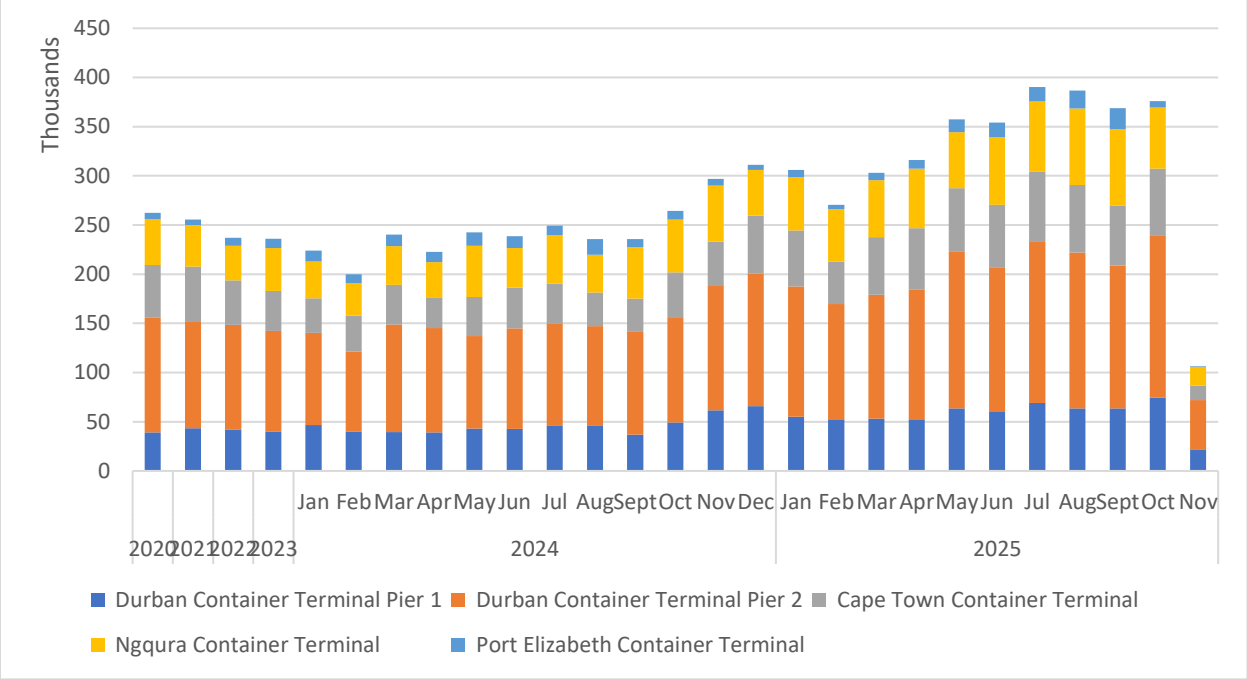
Table 3 – Container Ports – Weekly flow projected for 10 to 16 November (measured in TEUs)

7-day flow projected (10/11/2025 – 16/11/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 421	30 947	↓11%
New Pier (Pier 1)	1 695	11 863	↓20%
Cape Town Container Terminal	2 123	14 859	↑60%
Ngqura Container Terminal	2 159	15 110	↑8%
Port Elizabeth Container Terminal	381	2 665	↑1001%
Other	832	5 825	↑18%
Total	**11 610**	**81 269**	↑4%

Source: Calculated from TPT, 2025. Updated 09/11/2025.

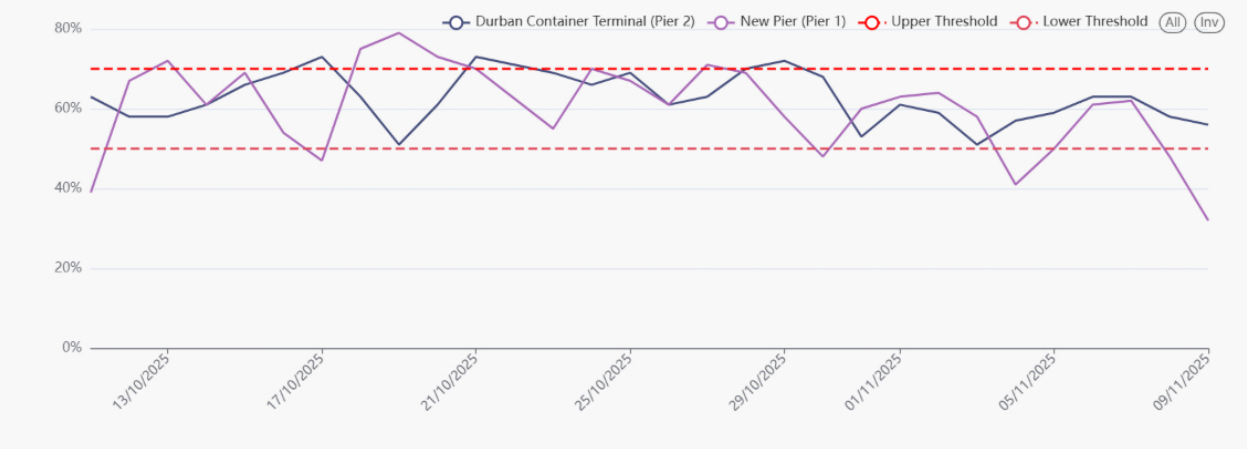
The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

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



Source: Calculated from TPT, 2025, and updated 09/11/2025.

Figure 4 – Stack occupancy in DCT, general-purpose containers (9 October to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 09/11/2025.

The following figure shows daily stack occupancy in Cape Town over a similar period.

Figure 5 – Stack occupancy in CTCT, GP, reefer, and empty stack (9 October to present, day on day)

Source: Calculated using data from Transnet, 2025, and updated 09/11/2025.

b. Summary of port operations

i. Weather and other delays

- More than 40 operational hours were conceded in Cape Town this week due to adverse weather.
- Equipment challenges and inclement weather prevented optimal performance in Durban.
- Vacant berths, equipment challenges, and adverse weather ensured operational delays at our Eastern Cape Ports.
- Adverse weather proved to be the primary operational constraint at the Port of Richards Bay.

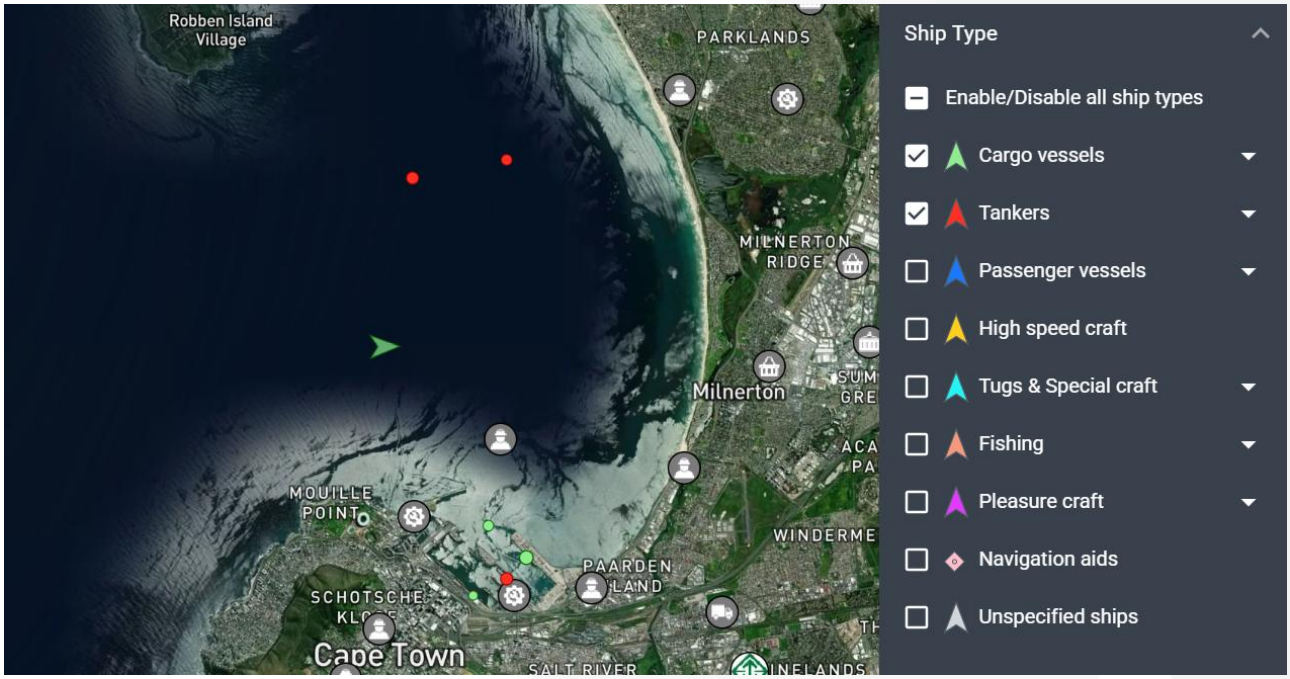
ii. Cape Town

On Friday, CTCT recorded one vessel at berth and one at anchor, as strong winds and equipment challenges proved to be the primary operational constraints at the port. To contextualise this, the terminal went windbound for the entire 24 hours between Thursday and Friday. On the landside, between Monday and Friday, the terminal managed to service at least 2 300 trucks while handling approximately 147 rail units. On the waterside, the terminal executed approximately 5 032 container moves across the quay during the same period. Additionally, this week, the terminal operated with between **8-9 STS cranes**, between **29-32 RTGs**, and approximately **59 hauliers**. Crane LC1 remained out of commission during the earlier parts of the week and returned to service around Wednesday.

On Friday, CTMPT had zero vessels at berth, with zero vessels waiting at outer anchorage. For the most significant part of the week, no waterside or landside volumes were handled at the terminal due to no vessels being on berth. As a result, stack occupancy figures were also recorded at 0% for the general-, reefer-, and empty stacks. The latest reports from TNPA suggest that the next vessel (wheat vessel) is scheduled for arrival around 10 November, with the next container vessel expected to arrive around 15 November.

Between 20 and 26 October, the FPT terminal handled four vessels: one multi-cargo and three layby vessels. Berth occupancy during this period was recorded at 66%. The terminal planned to hold six more vessels between 27 October and 2 November, with another five vessels scheduled between 3 and 9 November. Minimal delays were reported at the terminal during this period.

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



Source: Marine Traffic. Updated 09/11/2025 at 14:00.

iii. Durban

On Friday, Pier 1 recorded two vessels on berth, with zero vessels at anchor. Between Monday and Friday, the terminal executed at least 6 479 gate moves and 509 rail moves on the landside. The **TTT** for the week was significantly down and **~55 minutes on average** (**↓37%**, w/w), and the average **staging time** was **~40 minutes** (**↑5%**). Additionally, the terminal moved over 6 400 TEUs across the quay on the waterside during the same period. The terminal had between **four and six** (out of seven) **STS cranes** and around **13-15** (out of 25) **RTGs** available for the most significant part of the week. STS crane availability thus roughly sat at 71% for the week, with RTG availability roughly sitting at 56%. Lastly, TPT has indicated that repairs to ship-to-shore crane Q7 will take approximately **16 days**, during which Pier 1 will operate with only one berth. A 21-day berthing list has been provided, and TPT has been requested to issue a formal notification to industry on Monday (10 November).

Pier 2 had four vessels on berth and one at anchorage on Friday, as equipment breakdowns and adverse weather prevented optimal operational performance this week. The terminal operated with **9** to **11 gangs** and moved over **16 000** containers across the quay between Monday and Friday on the waterside. Approximately **15 003** gate moves were executed on the landside during the same period. The **average TTT** for the week was **~101 minutes** (**↑9%**, w/w), and the average staging time was **~93 minutes** (**↓19%**). Approximately 1 595 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **61** and **66** out of a fleet complement of **108** this week. Thus, the availability figure sat roughly at **59%** during this period.

TPT this week announced that trucks arriving at the Pier 2 Terminal without valid appointments will face restrictions, including possible bans from the terminal, as part of efforts to ensure smoother and more efficient operations at A-Check.

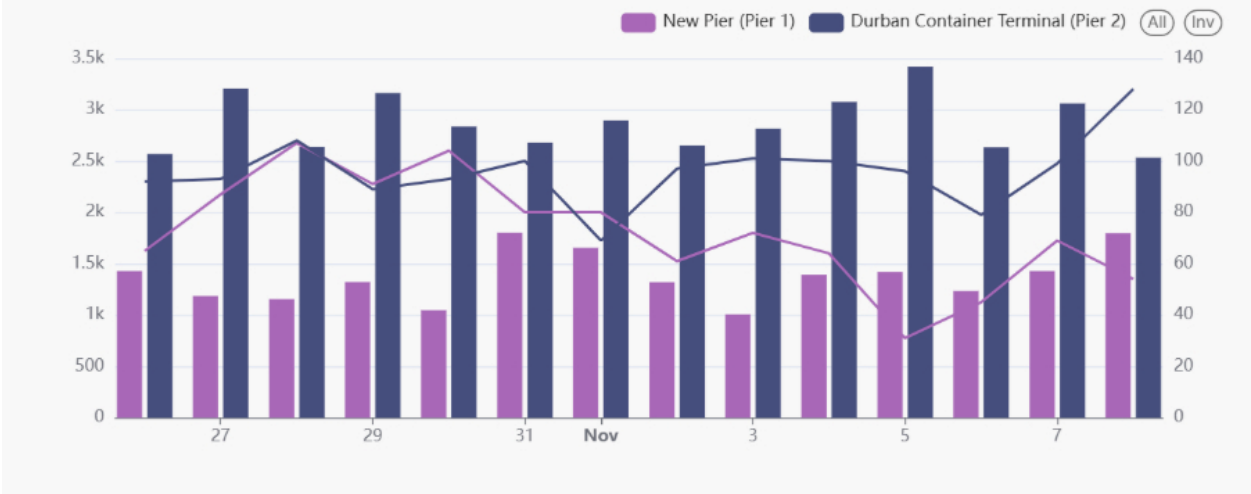
Durban operated with four tugs on Wednesday (12 November). The 5th tug is available, but the allocated crew are assisting with other vessels. The 6th tug will be available once the crew have been appointed.

Durban's MPT terminal recorded one vessel at berth on Friday and one at outer anchorage. Stack occupancy for containers was recorded at 21% and the breakbulk stack at 14%. In the preceding 24 hours, 311 containers and zero tons of breakbulk were handled on the waterside. On the landside, 214 container trucks were serviced at a TTT of ~31 minutes. Additionally, zero breakbulk trucks were serviced during this period. During this period, two cranes, seven reach stackers, eight forklifts, and 21 ERFs were in operation. The latest reports suggest that the third crane remained out of commission for the most significant part of the week for a wire rope replacement and is expected back in service by early next week. Additionally, the fourth crane is still on track to return to service towards the end of December.

On Friday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with six at anchorage. In the preceding 24 hours, the terminal handled 2 175 road units and 237 units on rail on the landside, while 2 124 units were handled on the waterside. Overall stack occupancy was recorded at 77%, with 60% recorded at Q+R and 90% at G-berth. The terminal had 137 abnormal loads and managed to handle 43.

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.

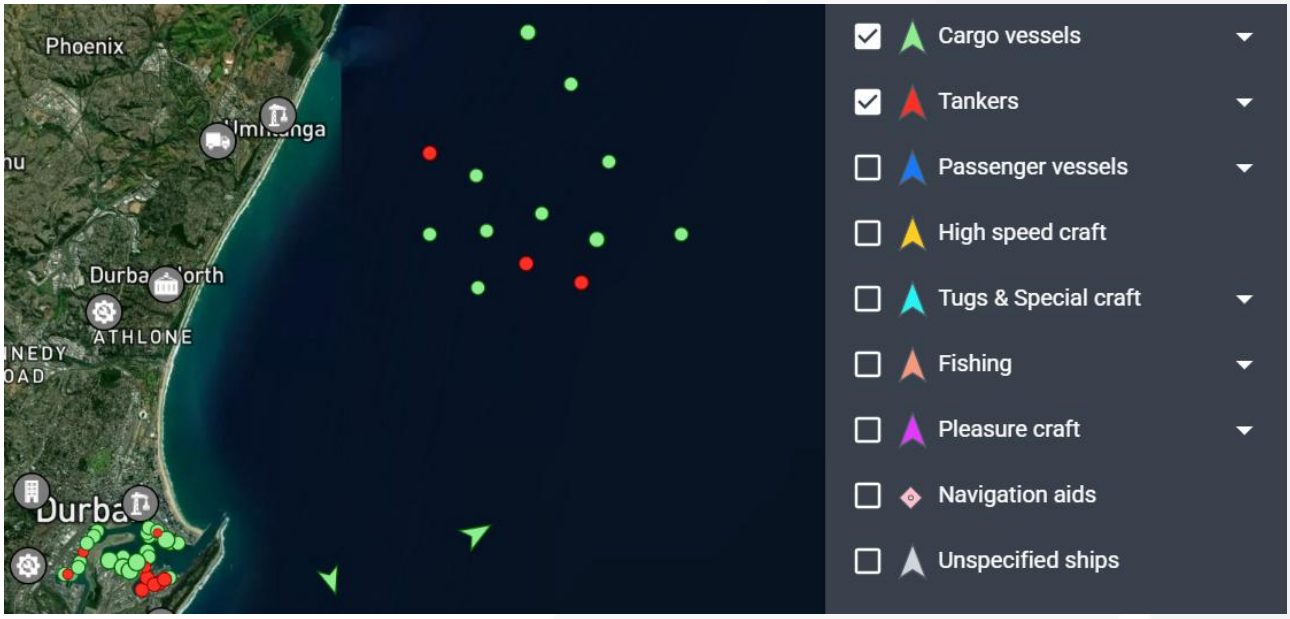
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 09/11/2025.

The queue of container vessels waiting outside Durban has remained stable this week. On Monday evening (10 November), **one** container vessel was waiting outside at anchorage for Pier 1, **two** for Pier 2, and **one** for Point. The queue of dry (**four**), liquid (**four**), and breakbulk (**one**) vessels has decreased slightly from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 09/11/2025 at 14:00.

iv. Richards Bay

On Monday (10 November), the Port of Richards Bay had 14 vessels at anchor and 14 on the berth, translating to four vessels at DBT, three at MPT, five at RBCT, and two at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter were deployed to support marine resources towards the end of the week. Adverse weather conditions proved to be the primary operational constraint at the port this week.

The daily average coal throughput for the week increased substantially and averaged around **216 000 tons** (**↑32%**, w/w) a day. An average of **18 trains** was serviced on the landside (down by **eight** from last week), and slightly below the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded two vessels on berth and one 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 12% for reefers and 15% for the general stack. There were instances this week where the berths were not fully occupied, which negatively impacted operational performance at the terminal. Moreover, during this period, the terminal handled approximately 2 581 TEUs and 12 reefers on the waterside. Approximately 522 trucks were processed on the landside at a TTT of ~28 minutes. For the most significant part of the week, the terminal had between 4 and 7 STS cranes, between 23-24 RTGs, and around 49-51 hauliers in service. Additionally, operations at the terminal were mostly challenged by adverse weather, high swells, and equipment challenges.

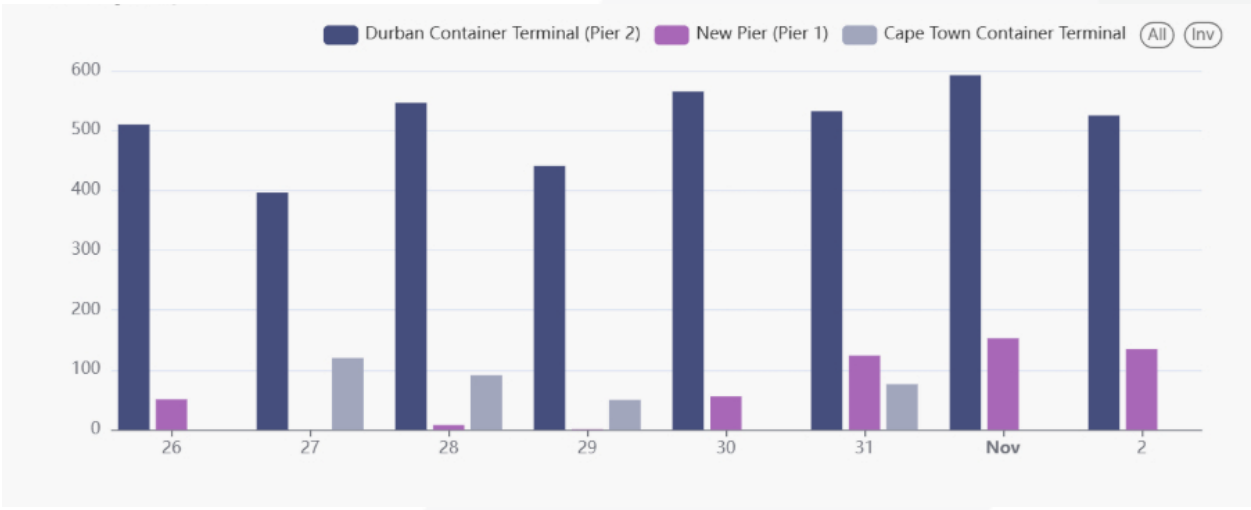
On Thursday, GCT had zero vessels at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 35 trucks were processed at a TTT of ~19 minutes on the landside, while 242 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 1% for the general stack and 1% for reefers. Towards the end of the week, the terminal had one STS crane, one mobile harbour crane, and eight straddles in service.

On Thursday, the Ro-Ro terminal recorded zero vessels at berth and none at anchor. In the 24 hours between Wednesday and Thursday, the terminal managed to handle 571 units, resulting in a stack occupancy figure of 20%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that the line between City Deep and Mafikeng reopened on Wednesday (12 November) afternoon, after the derailment and some heavy rain, but remained congested for the most significant part of the week due to backlogs. Congestion is expected to ease around 9 November. The ConCor line between Durban and City Deep experienced locomotive breakdowns on Tuesday (11 November), causing delays. Engineers are working to release the line on Wednesday. Additionally, towards the end of the week, DCT Pier 2 had 300 ConCor units on hand with a dwell time of 96 hours and 418 over-border units with a dwell time of 89 days.

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



Source: Calculated using data from Transnet, 2024. Updated 09/11/2025.

In the last week (*3 to 9 November*), rail cargo on the ConCor line out of Durban was reported at **3 573** containers, down by **↓12%** from the previous week's **4 074** 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 (*3 to 9 November*). For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *November 2024* averaged **~987 000 kg**.

Table 4 – International inbound and outbound cargo from OR Tambo

Flows	Daily Ave.	Weekly Ave.	Change (w/w)
Volume inbound	**818 297**	**5 728 080**	**↑19%**
Volume outbound	**471 039**	**3 297 274**	**↑10%**
Total	**1 289 336**	**9 025 354**	**↑16%**

Courtesy of ACOC. Updated: 09/11/2025.

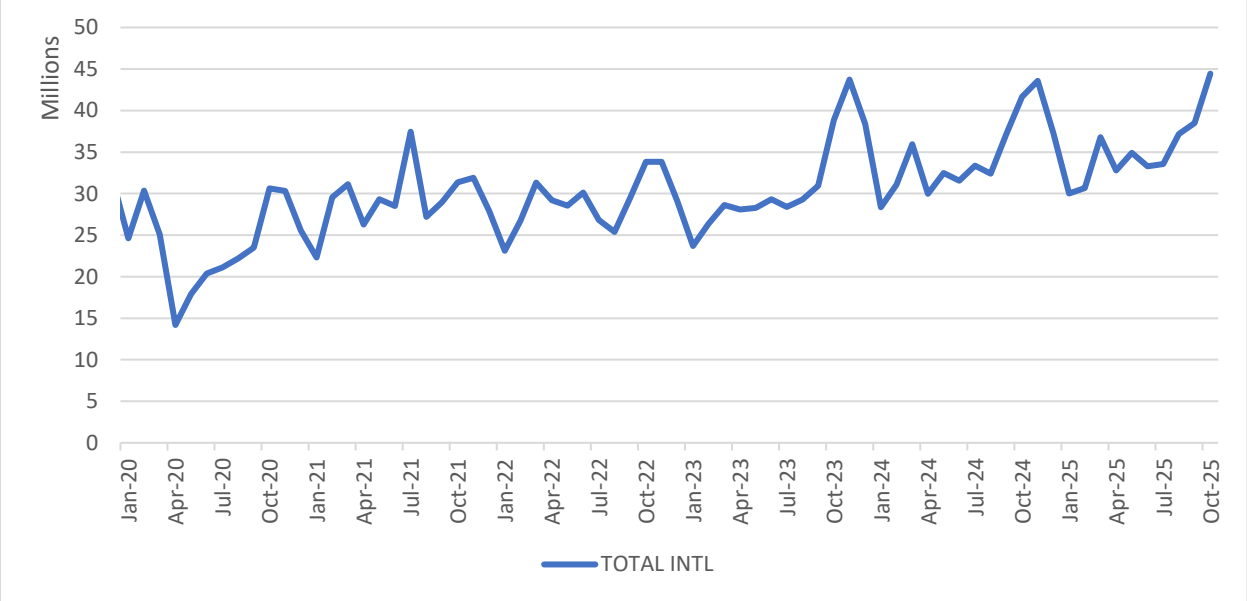
Air cargo increased substantially this week as the daily average of air cargo handled amounted to **~818 000 kg** inbound (**↑19%**, w/w) and **~471 000 kg** outbound (**↑10%**). Consequently, the current levels continue to trend significantly above last year's level (**~↑31%**) and the comparative levels of pre-pandemic 2019 (**~↑30%**).

For the full month of October:

- Johannesburg increased by **↑9%** (m/m) versus September and is up by **↑6%** (y/y) versus 2024.
- Cape Town increased by a substantial **↑42%** (m/m) and by **↑12%** (y/y) versus 2024.
- Durban decreased by a mere **↓1%** (m/m) and by **↓15%** (y/y) versus 2024.
- Because of monthly increases at Johannesburg and Cape Town, we have achieved a record throughput since our records began, as more than **44 million kilograms** of air cargo were handled in October. Consequently, and similar to last month, the year-to-date cargo remains up by **~↑5,4%** (y/y) compared to 2024.

The following figure shows the international air cargo flows to and from all terminals since the start of 2020, with the cyclical increases in October evident:

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



Calculated from ACOC. Updated: 09/11/2025.

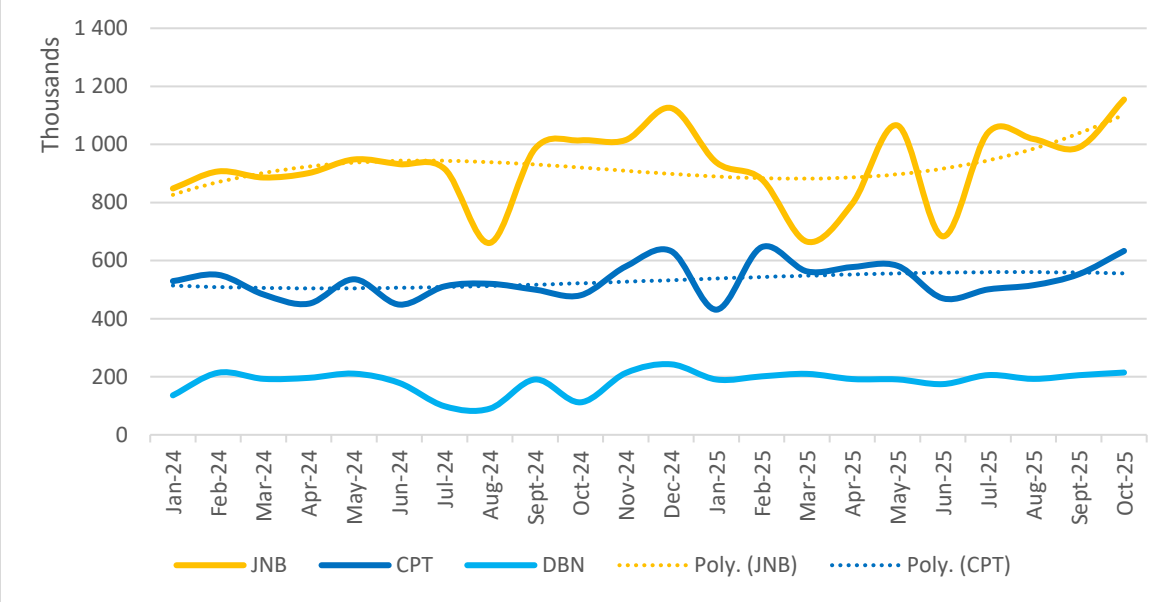
b. Domestic air cargo

For the full month of October, domestic volumes handled at our three main terminals also increased substantially and are significantly up on last month's and last year's volumes:

- Johannesburg increased by **↑17%** (m/m) versus September, and is up by **↑14%** (y/y) versus 2024.
- Cape Town increased by **↑15%** (m/m) and by **↑32%** (y/y) versus 2024.
- Durban increased by **↑4%** (m/m) and is nearly double that of last year in October (**↑92%**).

The following figure shows the movement since the start of last year:

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 09/11/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*3 to 9 November)*, movements along the N4 corridor decreased significantly for road transport. Reporting for rail transport was sparse.

- Truck volumes through the border post decreased to around **1 316 HGVs per day** (**↓11%**, w/w).
- Queue times increased slightly to an average of **~6,5 hours** at the border.
- The average processing time increased slightly to an average of **~6,3 hours** per crossing.

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	1 316	1 312	936	219	35	85	45	247	0	**n/a**	1	**n/a**
% (w/w)	**-11%**	**-8%**	**-13%**	**-5%**	**-11%**	**-7%**	**23%**	**-16%**	**n/a**	**n/a**	**-33%**	**n/a**
% 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 09/11/2025.

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

Figure 12 – Maputo vessel view (per vessel group)

Source: Marine Traffic. Updated 09/11/2025 at 14:00.

b. SADC cross-border and road freight update

The following table shows the consolidated monthly flow of HGVs across some of the key borders for October:

Table 6 – HGVs – Main South African borders (both directions)

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	16 517	**21%**	15 882	**21%**	32 399	**21%**
Groblersbrug	7 581	**1%**	6 177	**5%**	13 758	**3%**
Kopfontein	6 793	**12%**	765	**9%**	7 558	**11%**
Lebombo	44 086	**-1%**	41 978	**-2%**	86 064	**-2%**
Ramatlhabama	6 433	**35%**	1 850	**50%**	8 283	**38%**
Skilpadshek	9 299	**9%**	1 989	**9%**	11 288	**9%**

Source: TLC & FESARTA, 09/11/2025.

Heavy goods vehicle (HGV) traffic through South Africa's main border posts rose by **↑6%** (m/m), driven primarily by sharp increases at **Beitbridge** (**↑21%**) and **Ramatlhabama** (**↑38%**), despite a modest decline at **Lebombo** (**↓2%**).

Notable trends this week in cross-border road freight within South Africa and the broader SADC region:

- Overall, the average queue time also increased by approximately **a quarter of an hour** from last week, while transit time decreased by the same magnitude.
- The median border crossing times at South African borders increased by roughly **an hour and a quarter**, averaging **~11,3 hrs** (**↑11%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) also increased by around **a quarter of an hour**, averaging **~5,2 hrs** (**↑4%**).

1. **Beitbridge:** Severe congestion observed, with queues extending over **1.2 km past the weighbridge**.
    a. **Delays** intensified due to **ZIMRA inspections** of truck loads, slowing overall crossings.

2. **Kazungula One Stop Border Post (OSBP):**
    a. **Heavy congestion** noted midweek, primarily due to **inadequate parking** on the Zambian side and **slow processing**.
    b. A **new ZRA system** has been introduced that **automatically suspends clearing agents** with outstanding obligations until these are resolved.

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

Table 7 – Delays[6] summary – South African borders[7] (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	565	27,1	9,1	27,0	16 950	3 955
Beitbridge	Zimbabwe-SA	506	14,0	2,5	14,0	15 180	3 542
Groblersbrug	SA-Botswana	250	23,7	2,6	23,4	7 500	1 750
Martin's Drift	Botswana-SA	217	2,9	0,4	2,6	6 510	1 519
Kopfontein	SA-Botswana	205	11,3	1,3	11,2	6 150	1 435
Tlokweng	Botswana-SA	21	0,6	0,2	0,4	630	147
Vioolsdrift	SA-Namibia	30	4,7	1,5	4,4	900	210
Noordoewer	Namibia-SA	20	1,3	0,4	1,3	600	140
Nakop	SA-Namibia	30	3,5	0,3	3,3	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,3	1,0	600	140
Skilpadshek	SA-Botswana	296	10,7	1,6	10,4	8 880	2 072
Pioneer Gate	Botswana-SA	69	0,0	0,0	0,0	2 070	483
Ramatlhabama	SA-Botswana	200	4,4	1,1	4,2	2 280	532
Ramatlhabama	Botswana-SA	76	0,4	0,1	0,3	6 000	1 400
Lebombo	SA-Mozambique	1 401	6,5	2,1	6,3	42 030	9 807
Ressano Garcia	Mozambique-SA	1 337	1,7	0,2	1,4	40 110	9 359
Sum/Average		**5 243**	**7,1**	**1,5**	**7,0**	**157 290**	**36 701**

Source: TLC, FESARTA, & Crickmay, week ending 02/09/2025.

Table 8 – 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	15,1	4,8	14,9	9 600	2 240
Central Corridor	798	0,4	0,0	0,3	23 940	5 586
Dar Es Salaam Corridor	1 819	14,1	1,7	13,9	54 570	12 733
Maputo Corridor	2 738	4,1	1,2	3,9	82 140	19 166
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 495	12,7	2,1	12,5	104 850	24 465
Northern Corridor	2 817	1,4	0,4	1,8	92 520	21 588
Trans Caprivi Corridor	897	4,0	0,6	3,8	26 910	6 279
Trans Cunene Corridor	100	2,7	0,6	2,5	3 000	700
Trans Kalahari Corridor	100	0,0	0,0	0,0	3 000	700

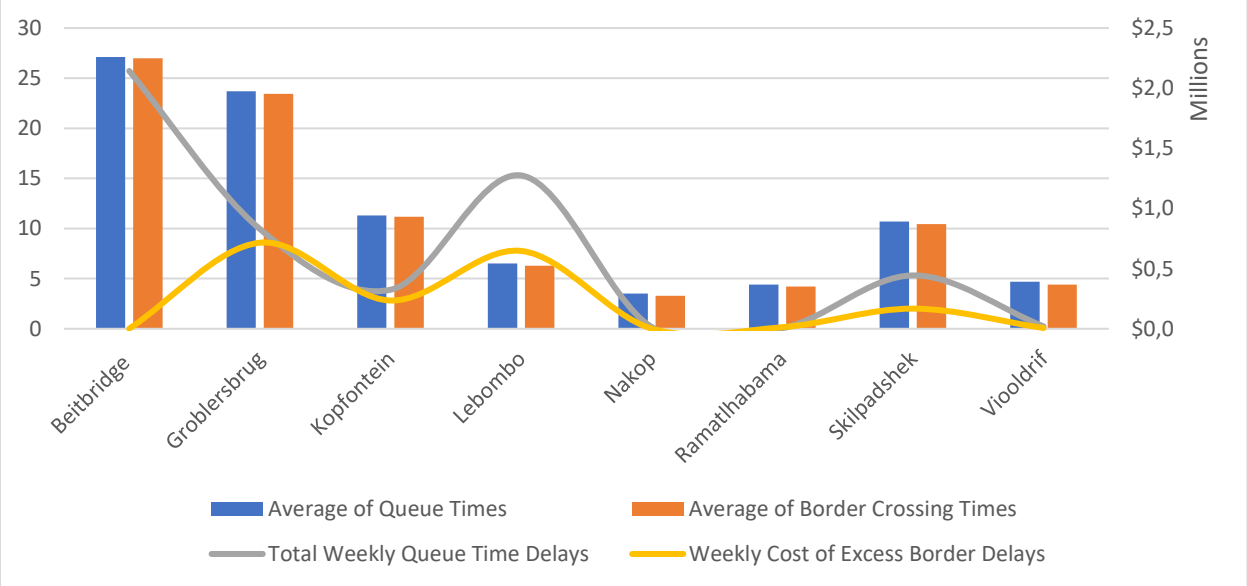
[6] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[7] Note: From this week onwards, bi-directional flows through the Ramatlhabama border post between South Africa and Botswana has been added.
[8] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Trans Oranje Corridor	116	10,3	2,4	9,9	3 480	812
Sum/Average	**13 327**	**5,9**	**1,1**	**5,9**	**407 820**	**95 158**

Source: TLC, FESARTA, & Crickmay, week ending 02/09/2025.

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

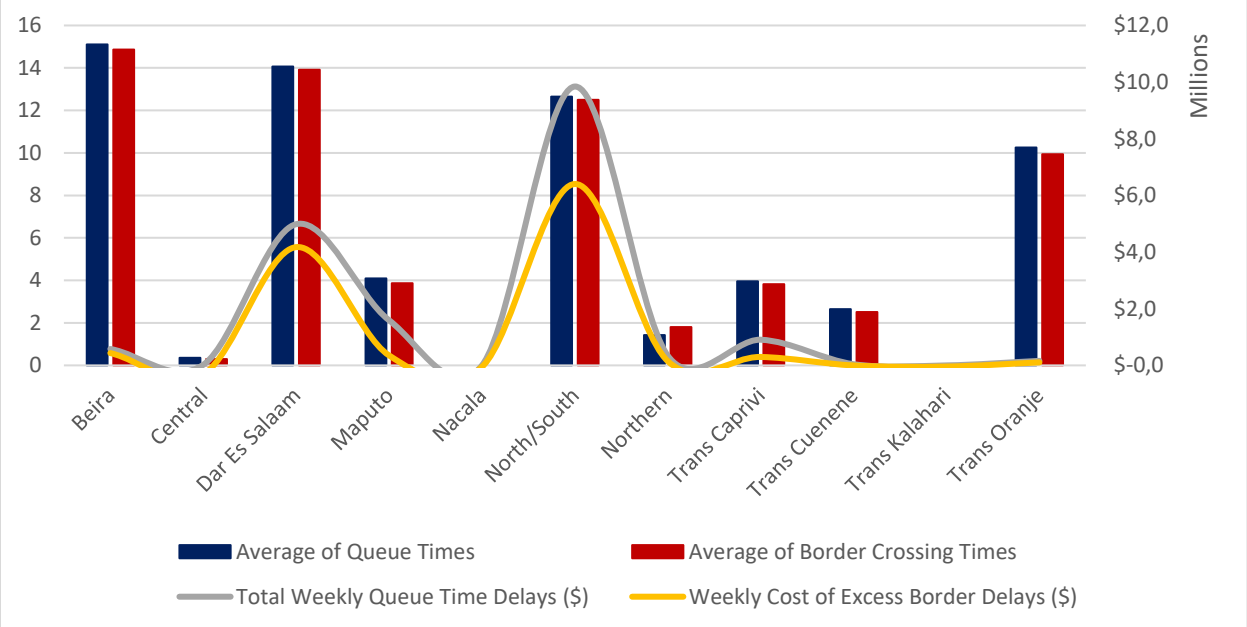
Figure 13 – Weekly cross-border delays & estimated cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 02/09/2025.

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

Figure 14 – Weekly cross-border delays & estimated cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 02/09/2025.

In summary, cross-border queue time averaged **~5,9 hours** (up by **~0,2 hours** from the previous week's **~5,7 hours**), indirectly costing the transport industry an estimated **$18,5 million** (**R318 million**). Furthermore, the week's average cross-border transit times also hovered around **~5,9 hours** (up by **~0,3 hours** from the **~5,5 hours** recorded in the previous report), at an indirect cost to the transport industry of **$11,5 million** (**R198 million**). The total indirect cost for the week amounts to an estimated **~$29,9 million** (**R515 million**, up by **↑5,7%** from the **~R488 million** in the previous report).

4. International Update

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

a. Global shipping industry

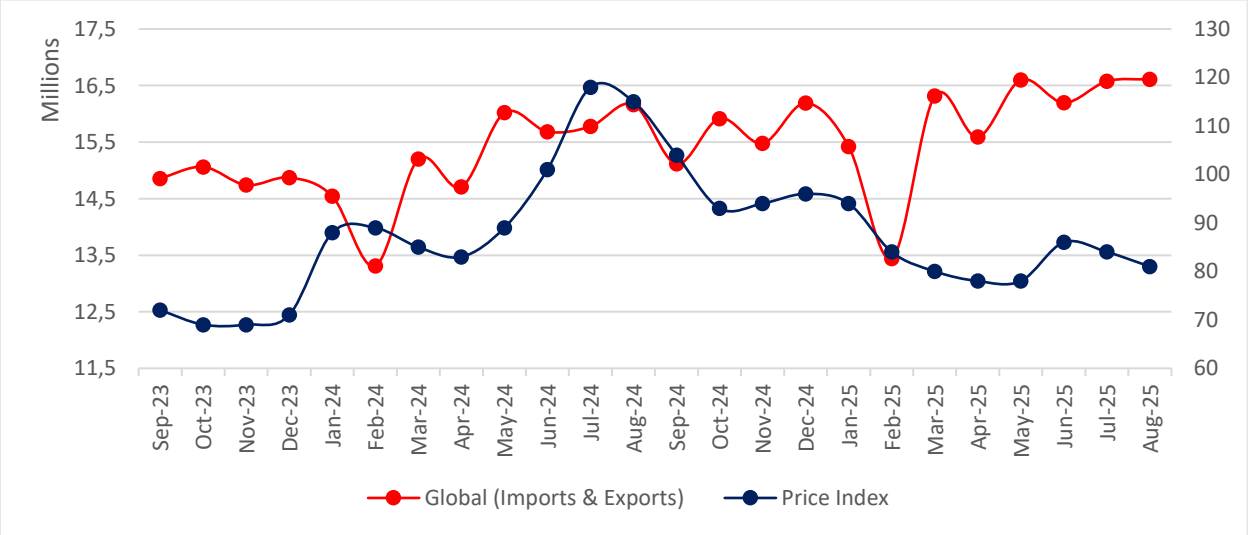
i. Global container trade statistics for September and Port Throughput Index

After the record throughput in August, the latest container throughput figures from *Container Trade Statistics* (CTS) show that container volume decreased significantly in September, but is still substantially above the corresponding period last year. The total throughput is down by **↓5,6%** monthly, but still up by **↑5%** (y/y) annually.

Regionally, it was a mix, as some trade lanes experienced increases in September (notably Australasia and Oceania and Sub-Saharan Africa imports at **↑1,6%** and **↑1,4%**, respectively, and South & Central American exports at **↑3,2%**), whilst all the rest experienced decreases, with the most substantial being SSA exports at **↓11,6%** monthly.

The global price index (dry and reefer combined) decreased again in September by **↓5,6%** monthly and remains significantly down by **↓27%** yearly. Collectively, the following figure illustrates the global container throughput and price index in the last four years:

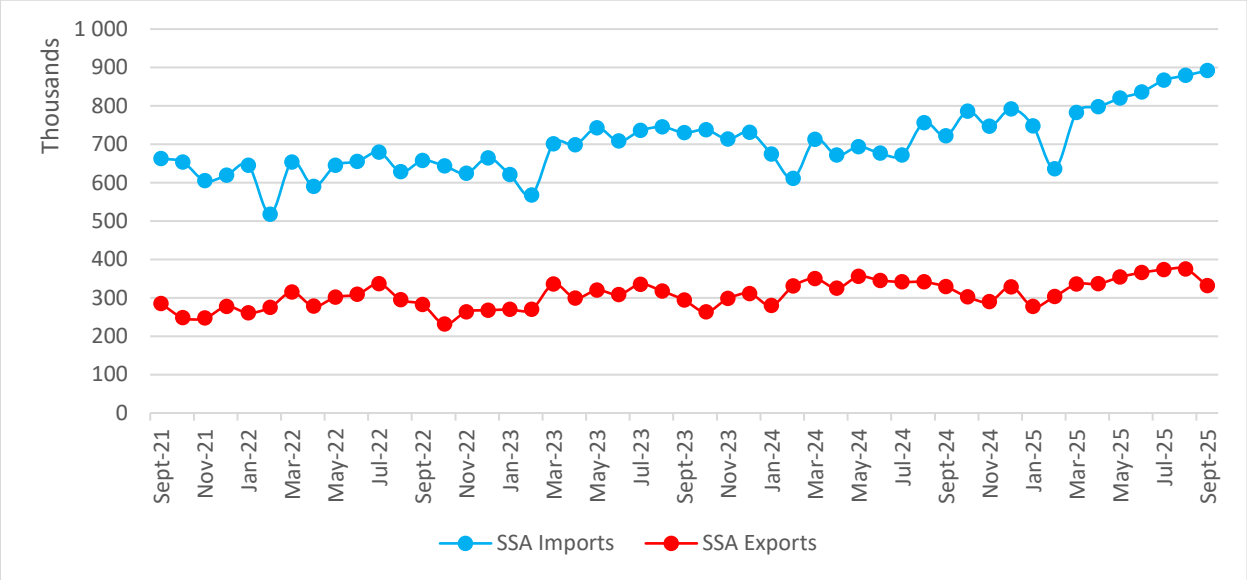
Figure 15 – Global Containerised Throughput (TEUs) and price index



Source: Calculated from CTS

Throughput in September reached **15,85 million TEUs** – some **950 thousand containers** below the record level achieved last month. The following figure shows Sub-Saharan African trade over the same period, with a **↑1,4%** (m/m) increase in containers imported, and a **↓11,6%** (m/m) decrease in containers exported:

Figure 16 – Sub-Saharan Africa Containerised Throughput (TEUs)



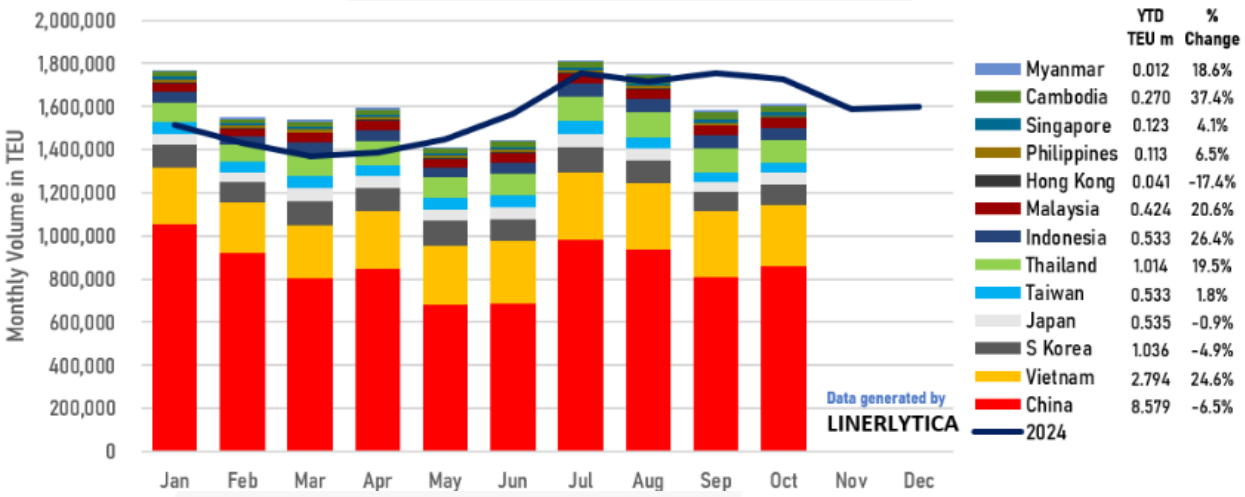
Source: Calculated from CTS

Despite the substantial drop in exports, the longer-term trend has been overwhelmingly positive across the last four years. Indeed, yearly SSA imports remain significantly up (**↑24%**, y/y) – with exports up by **↑0,8%** (y/y). All in all, as the year draws to a close, global container indices indicate that the 2025 worldwide container forecast will likely fall within the **↑3,2%-4%** range.

ii. Global container summary: rates, volumes, and capacity

Freight rates are softening after a failed 1 November general rate increase, as carriers haven't cut capacity amid weakening slack-season volumes. Transpacific rates face the strongest pressure, with import volumes from the Far East to the US falling by **↓7,2%** (y/y) in October and **↓10%** in September – echoing the global view above; however, even more pronounced. YTD volumes through October remain slightly positive (**↑2,1%**), but full-year growth is projected at just **↑0,4%**, with most growth expected to flatten in 2026. In contrast, European trades hold firmer, supported by persistent port congestion limiting adequate capacity.

Figure 17 – FE-US Transpacific container volumes (by month)

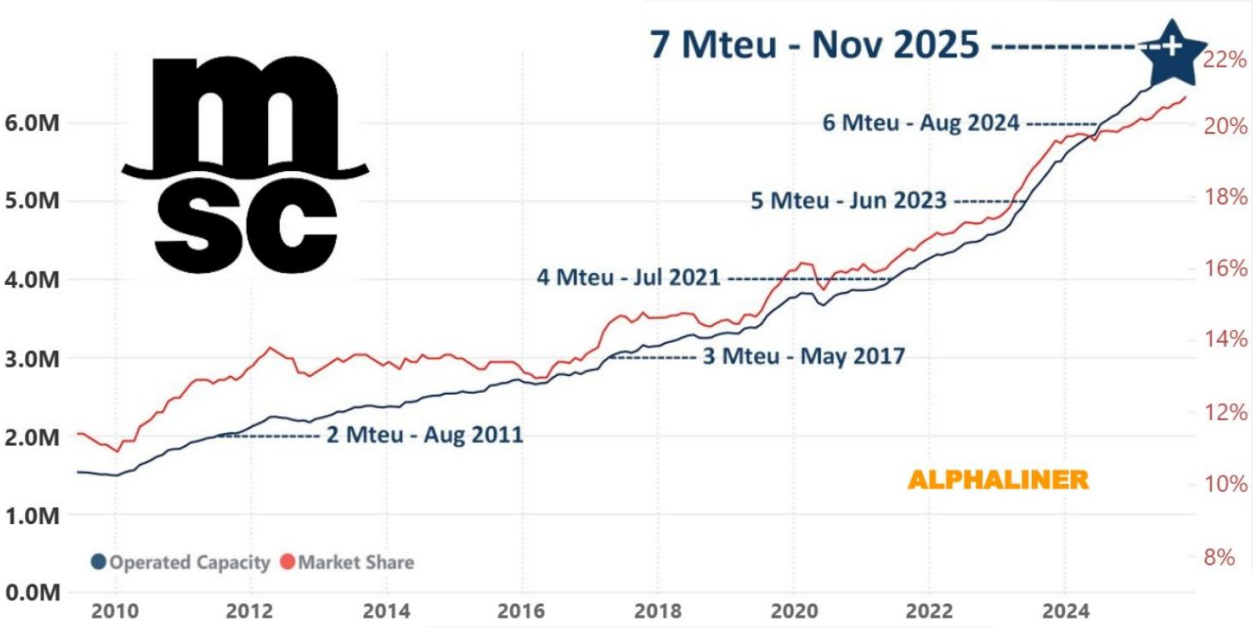


Source: Linerlytica

Even more specifically for the US, *Sea-Intelligence's* latest analysis notes that while overall Laden inbound volumes contracted sharply on the US West Coast in Q2 2025, only the Port of Los Angeles managed a year-on-year increase of **↑9,7%** in June, thereby boosting its share by **↑2,8%**.[9]

MSC has reached a significant milestone, surpassing a fleet capacity of **7 million TEUs** (TEU) according to Alphaliner.[10] The growth from **6 million** to **7 million TEU** took just 15 months, driven by new-builds and second-hand acquisitions. MSC now controls around a **21% share** of global container-ship capacity, significantly ahead of its nearest rival, Maersk. This underlines MSC's dominant position in the liner shipping industry.

Figure 18 – MSC: Operating Capacity and Market Share



Source: Alphaliner

Elsewhere, rounding off the industry:

1. **Fleet expansion:**
    a. MSC and Maersk continue to add newbuild tonnage, with the global orderbook still expanding despite softer demand.[11]
2. **Regulatory pressure:**
    a. France has begun a compliance crackdown on Shein imports and is urging broader EU sanctions over customs and safety concerns.[12]
3. **Tanker market:**
    a. Rising shipping rates have driven up second-hand crude tanker prices, signalling renewed investment appetite.
    b. VLCC freight rates surged over **$100 000 per day**, following the rise in OPEC+ output.[13]
4. **Geopolitical shifts:**

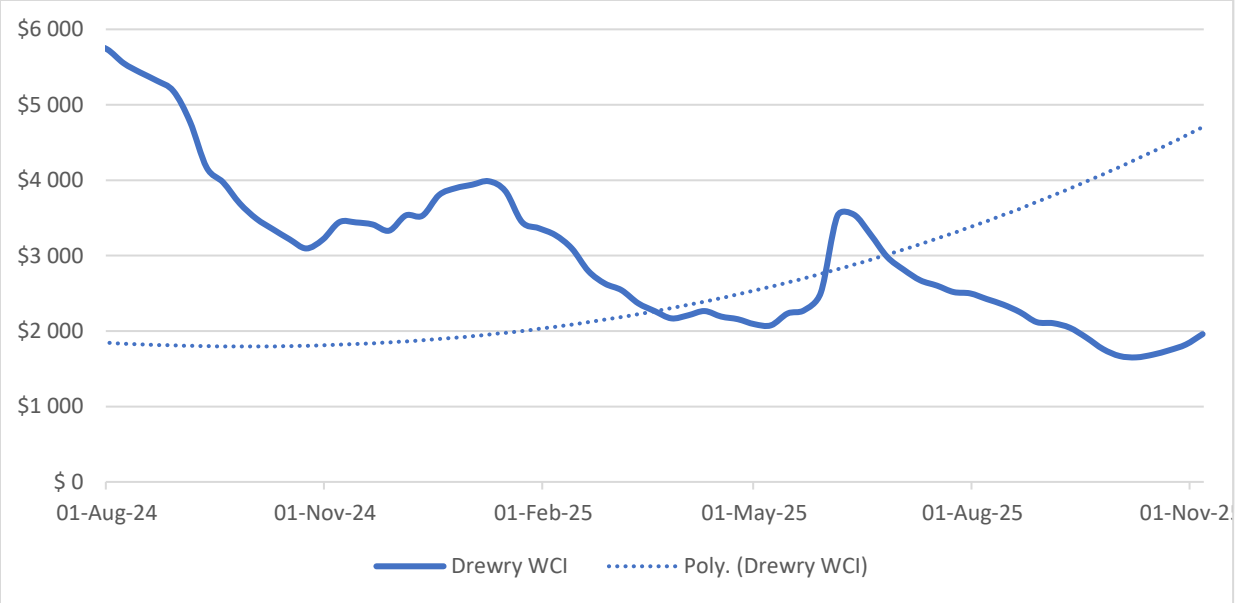
[9] Sea Intelligence. 12/11/2025. Port of LA gains market share as US ports lag.
[10] Alphaliner. 05/11/2025. MSC becomes first carrier to hit 7 Mteu fleet capacity.
[11] Goldstone, C. 05/11/2025. Liner newbuild orderbook still swelling as MSC and Maersk go shopping.
[12] Todd, S. 07/11/2025. France grounds Shein imports in crackdown – urges EU sanction.
[13] Drewry. 04/11/2025. A surge in shipping rates drives the second-hand prices of crude tankers.

a. Houthi rebels have indicated that attacks in the Red Sea may cease,[14] and regional carriers are cautiously restoring services to affected lanes.[15]

iii. Global freight rates

This week, the "*World Container Index*" (WCI) rose by **↑7,5%** (or **$137**) to **$1 959 per 40-ft container**, marking the fourth consecutive week of increases after a long period of decline.[16] Meanwhile, carriers implemented the 1 November general rate increases (GRIs) on major trade lanes; as reported by *The Loadstar*, they are already offering "*selective discounts to backfill half-empty ships*", indicating the uptick may be fragile.[17] The following illustrates the pronounced volatility since August last year:

Figure 19 – World Container Index (WCI)



Source: Calculated from Drewry

b. Global air cargo industry

According to high-frequency metrics from World ACD, global air cargo volumes maintained strong momentum into late October, with tonnages up **↑4%** year-on-year (y/y) and on track for **↑4% full-year growth**. October saw an **↑8%** (m/m) rebound in volumes, led by Asia Pacific (**↑8%**), Europe (**↑10%**), and the Americas (**↑11%**). Capacity expanded modestly, with most regions stable or slightly up over two weeks (2w/2w).

[14] Whiteman, A. 11/11/2025. Houtis signal attacks on shipping in the Red Sea may be at an end.
[15] Koo, A. 11/11/2025. Regional operators add Red Sea services – but liners'return may be looming.
[16] Drewry. 06/11/2025. World Container Index.
[17] Van Marle, G. 07/11/2025. Spot rates lifted by GRIs, but carriers discount to backfill half-empty ships.

Figure 20 – Capacity, chargeable weight and rates (last two to five weeks, % change)

Origin Regions
last 2 to 5 weeks
WORLD ACD

	Capacity[1]			Chargeable weight[1]			Rate[1]		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		+1%	+13%		+0%	+0%		-0%	-0%
Asia Pacific		+5%	+6%		+8%	+10%		+5%	-6%
C. & S. America		+1%	+8%		-2%	+1%		+2%	-4%
Europe		-2%	+4%		-1%	+0%		+2%	+0%
M. East & S. Asia		+1%	+10%		-13%	-5%		-0%	-21%
North America		-0%	-2%		-1%	-1%		+2%	-2%
Worldwide		+1%	+4%		+2%	+4%		+5%	-4%

Source: World ACD

Average worldwide rates rose **↑1%** (m/m) to **$2,48/kilogram**, though they remain **↓5%** below last year's level. The central upward pressure came from Asia Pacific origins (**↑3%**, m/m), while Europe was the only region to post a yearly rate increase (**↑1%**).

ENDS[18]

[18]**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.*