Authored by:
www.saaff.org.za

Distributed by:
www.busa.org.za

Cargo Movement Update #238[1]

Date: 15 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)	41 190	46 927	**88 117**	39 963	45 530	**85 493**	↑3%
Air Cargo (tons)	4 670	2 485	**7 155**	4 015	2 306	**6 321**	↑13%

Monthly Snapshot

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

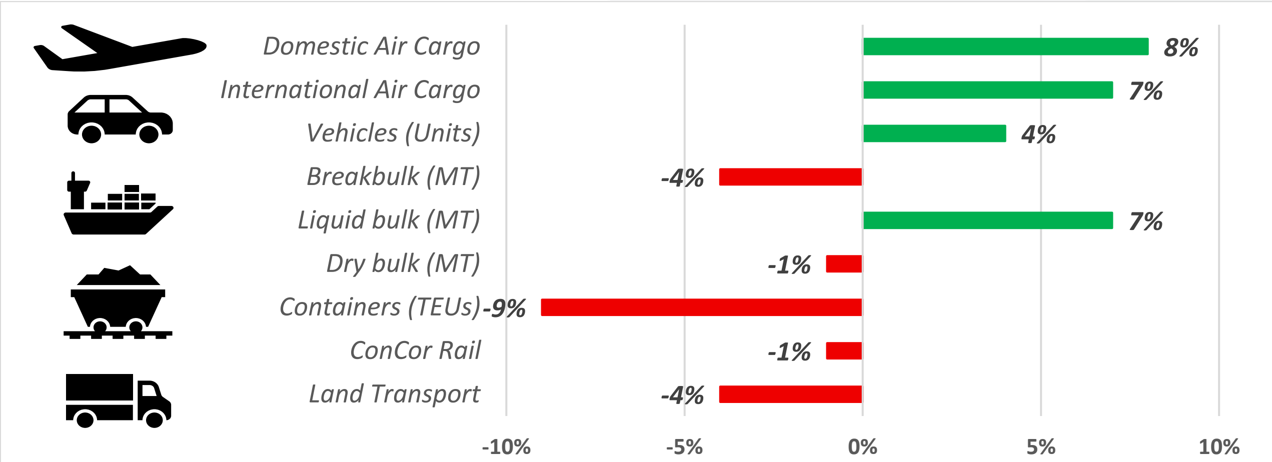
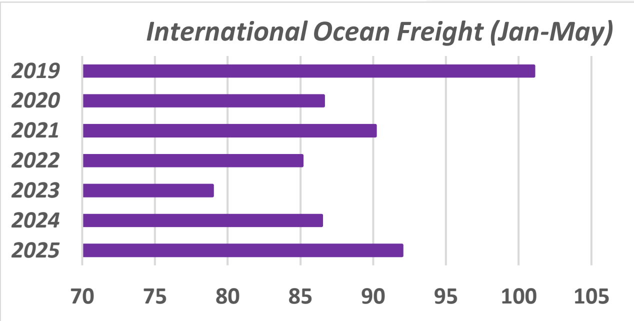
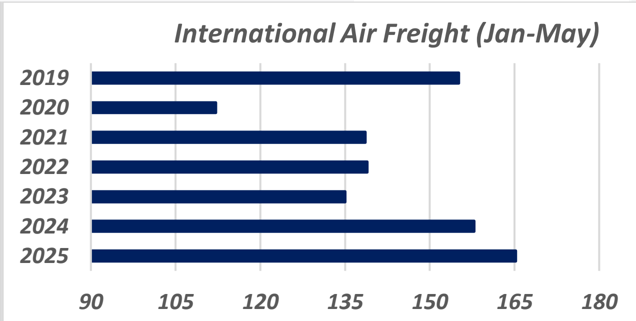


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)





Key Notes

- An average of **~12 588 TEUs** was handled per day, with **~12 275 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **1 641** containers, down by **↓53%** from last week.
- Cross-border queue: **no change**; transit: **↓0,1 hrs**; SA borders: **9,3 hrs** (**↑11%**); SADC: **4,7 hrs** (**no change**).
- Global container throughput outlook revised down with four-quarter average rate moderating to **↑5,8%**.
- Global spot rates increased by **↑0,5%** (**$16**) to **$3 543/40ft**; charter rates **@$74 000/day** for **8 500 TEUs**.
- Global air cargo showed modest growth in weight (**↑2%**, y/y), with stable average rates @**$2,44/kg**.

---

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *238th* 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, an average of **12 588 TEUs** was handled daily, increasing slightly from **12 213 TEUs** the previous week. Port Operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages. Equipment challenges and vacant berths ensured operational disruptions at the Port of Cape Town, while the main operational constraints in Durban proved to be continuous equipment breakdowns and adverse weather. Inclement weather, vessel ranging, and vacant berths mainly impacted our Eastern Cape Ports operations. In contrast, operations at the Port of Richards Bay were primarily affected by poor weather this week. The latest reports from Maersk suggest that the planned swap between the Maersk Cubango 521E and Hedwig Schulte 522E will no longer take place, while the Fleur N will omit Coega due to congestion and schedule delays experienced in West Africa. Furthermore, the latest reports from TFR suggest that Cable theft continues on the Capital Park line near Pretoria. At the same time, three or four trees fell over and onto the line between Durban and Mooi River between Tuesday and Wednesday due to the adverse weather experienced. Lastly, and very importantly, Transnet has successfully concluded a three-year wage agreement with its recognised labour unions, UNTU and SATAWU.

The global terminal operator GTO landscape is undergoing structural change, with hybrid carrier-backed models – particularly MSC – rising to dominance through aggressive acquisitions. If MSC's bid for Hutchison succeeds, it will become the world's largest terminal operator, intensifying competition and raising equity concerns for independent players. On the alliance front, the dissolution of 2M has reshaped East–West trade dynamics: Maersk and Hapag-Lloyd have formed the Gemini Cooperation, THE Alliance has restructured into Premier, and MSC now operates independently. Alphaliner's latest assessment shows OCEAN Alliance remains the largest, with **4,37 million TEU**, followed by Gemini (**3,69m TEU**) and Premier (**2,42m TEU**). MSC, now operating independently, deploys **3,27m TEU**. However, alliance comparisons are increasingly complex due to divergent models. Meanwhile, global freight rates have stabilised slightly following recent tariff-related surges.

In May, international air cargo volumes increased month-on-month at Johannesburg (**↑7%**), and decreased at Cape Town (**↓3%**) and Durban (**↓7%**). Year-on-year, cargo is up at all terminals (Johannesburg at **↑6%**, Cape Town **↑12%**, and Durban at **↑25%**) compared to 2024. Domestically, May volumes rose month-on-month at Johannesburg (**↑34%**) and Cape Town (**↑1%**), with both terminals also showing strong year-on-year growth (**↑12%** and **↑9%**, respectively), while Durban recorded decreases both month-on-month (**↓1%**) and year-on-year (**↓9%**) compared to 2024.

Internationally, in early June 2025 (Week 23), global air cargo showed modest year-on-year growth in chargeable weight (**↑2%**) with stable average rates, though capacity remains constrained (**↓6%**, y/y). Africa led all regions with an **↑8%** increase in chargeable weight and a **↑4%** rise in rates, reflecting growing demand amid reduced capacity.

Cargo movements along the N4 corridor increased for road and were stable for rail, with truck volumes through the border post at **1 530 HGVs per day** (**↑6%**, w/w). Queue times were unchanged at an average of **2,9 hours**' at the border, as the average processing time decreased slightly to around **2,5 hours** (**↓4%**) per crossing. The rail to Maputo was stable at an average of **nine trains daily**. Sugar trains from Eswatini decreased slightly to around **one train a day**.

Land border crossing times were primarily unchanged throughout the SADC region. Overall, the average queue time **remained constant** from last week, while transit time decreased by around **10 minutes**. The median border crossing times at South African borders increased by nearly **an hour**, averaging **~9,3 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 a **day and a quarter** from **the Zambian side**). Other developments included **(1)** Zambia Revenue Authority (ZRA) systems downtime, **(2)** Zimbabwe anti-smuggling inspections, and **(3)** security alert – copper theft on DRC's N1 route.

Encouraging developments have emerged across several South African logistics network segments in the last few weeks. Transnet's three-year wage agreement brings much-needed labour stability, supporting operational and strategic continuity. Bulk cargo volumes continue their positive trajectory, with year-to-date growth of **↑6,4%**, while air cargo also shows sustained strength — up **↑5%** YTD and outperforming both 2023 and pre-pandemic 2019 levels. However, these gains are offset by the continued underperformance in the containerised sector, which remains **↓4,1%** below last year and **↓4,9%** below 2019 levels. Despite some improvements in fluidity and collaboration, containerised cargo — which accounts for nearly **40% of total trade**, and trade itself constituting approximately **64% of South Africa's GDP** — is not yet exhibiting the growth required to underpin a broad-based recovery in the national logistics system. Lastly, the Merchant Shipping Bill has been brought to Nedlac for consultation—a critical opportunity to strengthen the legislative framework for South Africa's maritime sector, given that the current draft contains several gaps that require careful refinement to ensure regulatory clarity, competitiveness, and alignment with global best practice.

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 9 to 15 June (measured in TEUs)

7-day flow reported (09/06/2025 – 15/06/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 222	29 553	**↑0,5%**
New Pier (Pier 1)	2 058	14 406	**↑17%**
Cape Town Container Terminal	2 626	18 382	**↑19%**
Ngqura Container Terminal	2 372	16 604	**↓3%**
Port Elizabeth Container Terminal	356	2 495	**↓29%**
Other	954	6 677	**↓12%**
Total	**12 588**	**88 117**	**↑3%**

Source: Calculated from TPT, 2025. Updated 15/06/2025.

An increased average of **~12 588 TEUs** (**↑3%**) was handled per day for the last week (*9 to 15 June, Table 2*), slightly above the projected average of **~12 275 TEUs** (**↑3%** actual versus projected).

For the coming week, a slightly decreased average of **~12 275 TEUs** (**↓2%**) is predicted to be handled (*16 to 22 June, Table 3*). Despite the good throughput, port operations this week were further characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages.

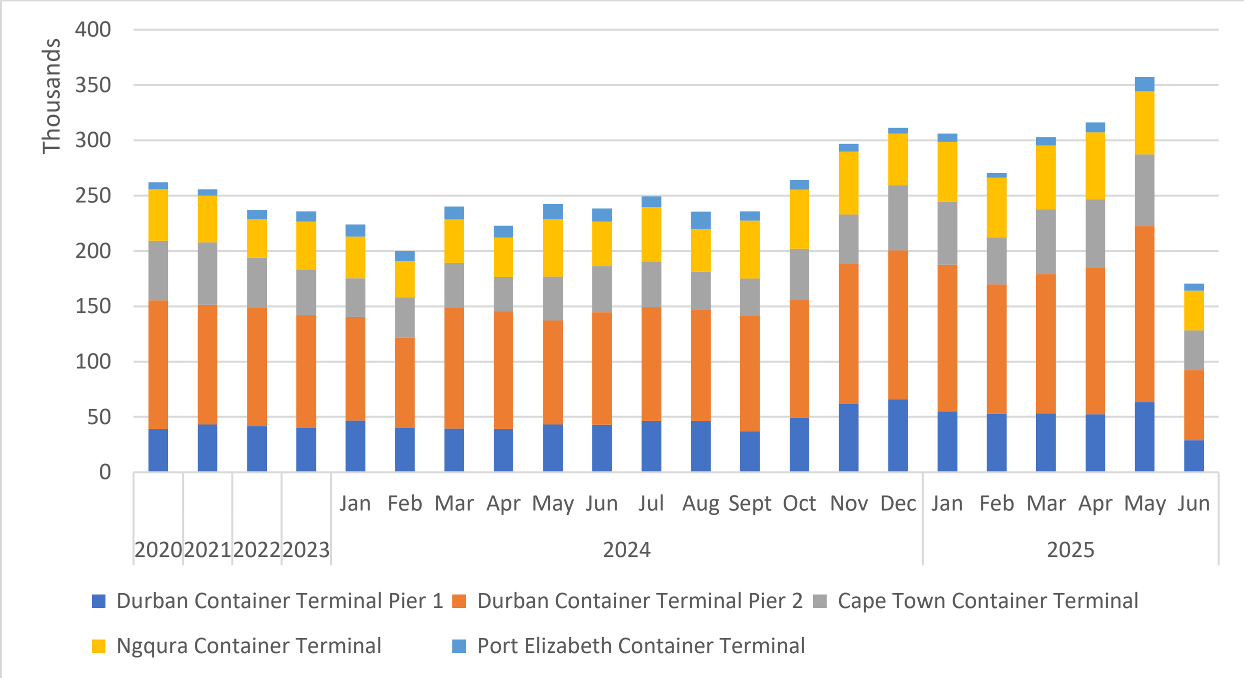
Table 3 – Container Ports – Weekly flow projected for 16 to 22 June (measured in TEUs)

7-day flow projected (16/06/2025 – 22/06/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 208	36 459	**↑23%**
New Pier (Pier 1)	1 996	13 975	**↓3%**
Cape Town Container Terminal	1 698	11 887	**↓35%**
Ngqura Container Terminal	2 064	14 447	**↓13%**
Port Elizabeth Container Terminal	444	3 110	**↑25%**
Other	864	6 047	**↓9%**
Total	**12 275**	**85 925**	**↓2%**

Source: Calculated from TPT, 2025. Updated 15/06/2025.

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.

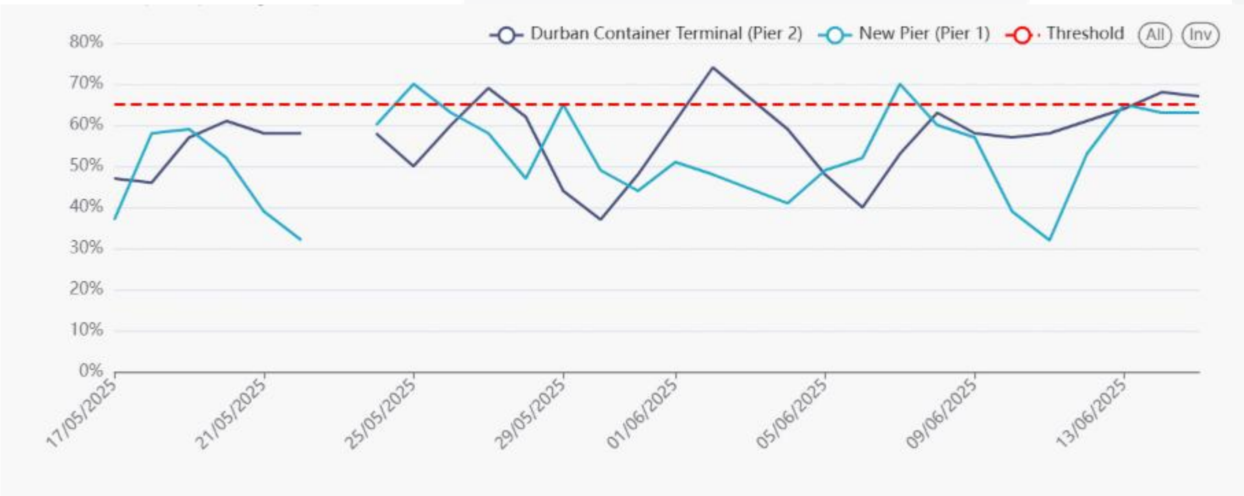
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 15/06/2025.

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

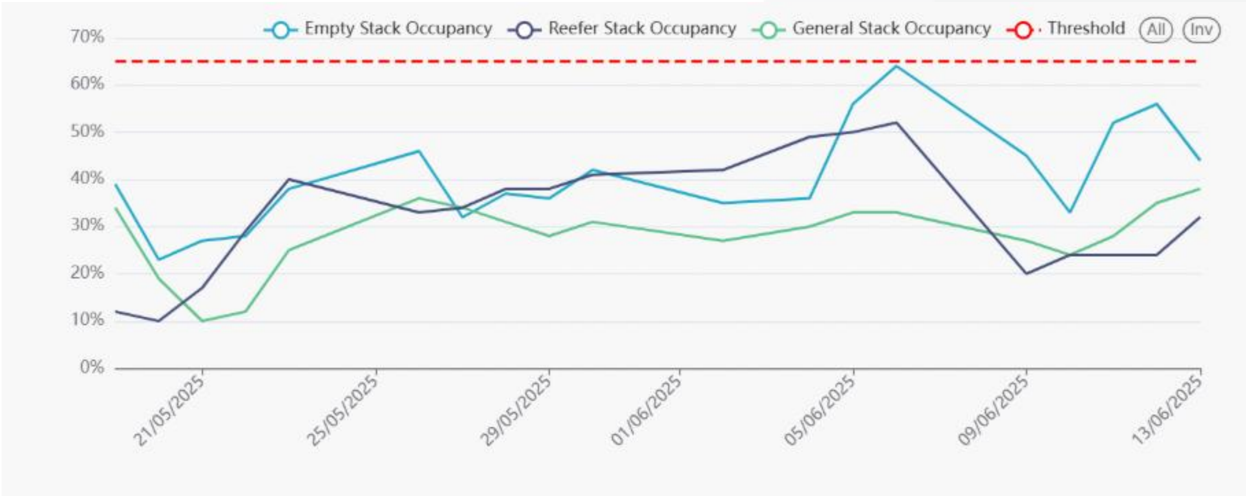
Figure 4 – Stack occupancy in DCT, general-purpose containers (17 May to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 15/06/2025.

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 (19 May to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 15/06/2025.

b. TNPA: May update

TNPA has released consolidated port statistics for May[6], with significant increases in monthly performance across the respective sub-sectors[7]:

- Containers increased monthly by **↑19%** (m/m), but decreased annually by **↓9%** (y/y).
- Total bulk cargo increased monthly by **↑7%** (m/m) and annually by **↑0,4%** (y/y).
- Vehicles increased monthly by **↑10%** (m/m) and annually by **↑4%** (y/y).

The following table shows the respective changes versus April:

Table 4 – TNPA – Monthly volume and growth: May 2025

	Apr	May	Movement	% change
Containers (TEUs)	**290 682**	**346 480**	**55 798**	**19%**
Landed	146 025	167 826	21 801	15%
Shipped	144 657	178 654	33 997	24%
Dry bulk (MT)	13 309 197	14 228 886	919 689	7%
Liquid bulk (MT)	2 680 491	2 916 933	236 442	9%
Breakbulk (MT)	437 111	492 083	54 971	13%
Vehicles (Units)	55 905	61 292	5 387	10%
Total cargo (excl. Vehicles)	**16 426 799**	**17 637 901**	**1 211 102**	**7%**

Source: TNPA, updated 12/06/2025.

Transnet Port Terminals handled **346 thousand containers** and **17,6 million metric tonnes** of **bulk** cargo during May, significantly more than the **290 thousand containers** and **16,4 million metric tonnes** of **bulk** last

[6] Transnet. 2025. Port statistics.
[7] The apparent monthly increases for May should be interpreted with caution, as Transnet's reported figures for April reflect only 25 days of activity due to financial year-end adjustments.

month. However, compared to cyclical trends, containers are down by **33 thousand,** and bulk cargo **is almost the same** compared to May 2025:

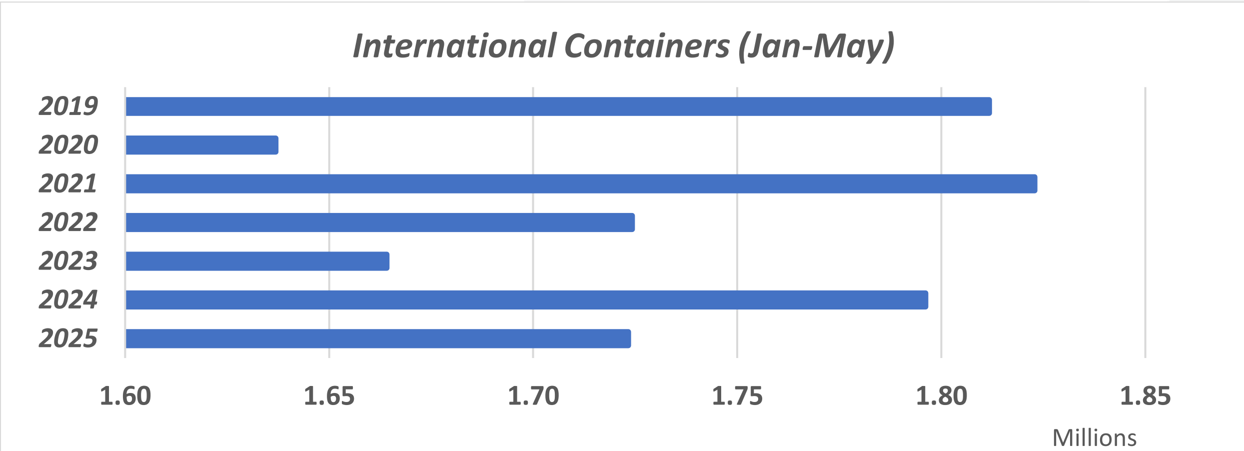
Table 5 – TNPA – Cyclical volume and growth: May 2019, 2024, and 2025

	2019	2024	2025	% '20 –'25	% '24-'25
Containers (TEUs)	**368 223**	**379 755**	**346 480**	**-6%**	**-9%**
Landed	194 968	194 585	167 826	-14%	-14%
Shipped	173 255	185 170	178 654	3%	-4%
Dry bulk (MT)	16 945 481	14 328 195	14 228 886	-16%	-1%
Liquid bulk (MT)	3 939 730	2 722 664	2 916 933	-26%	7%
Breakbulk (MT)	674 743	513 773	492 083	-27%	-4%
Vehicles (Units)	59 886	59 146	61 292	2%	4%
Total cargo (excl. Vehicles)	**21 559 954**	**17 564 632**	**17 637 901**	**-18%**	**0,4%**

Source: TNPA, updated 12/06/2025.

When reading the cyclical figures with the year-to-date figures (note *Figure 2*), there is some optimism, as South Africa's bulk cargoes are up by **↑6,4% YTD**. Unfortunately, for containers, the story is not similar, which is illustrated by the following year-to-date for containers to May:

Figure 6 – Year-to-date flows 2019-2025: containers, y/y (TEU millions)



Source: TNPA, updated 12/06/2025.

Containers are down versus last year (**↓4,1%**) and **↓4,9%** below 2019 levels. The current YTD is at least above 2023 and the pandemic-induced year 2020. However, the reality is that despite some encouraging signs in the container sector — including the arrival of new equipment, better stack fluidity at key terminals, and early indications of industry collaboration — we remain well short of a full recovery and have yet to establish a dependable containerised platform for sustained volume growth.

c. Summary of port operations

i. Weather and other delays

- Equipment challenges and vacant berths ensured operational disruptions at the Port of Cape Town.
- The main operational constraints in Durban proved to be continuous equipment breakdowns and adverse weather.
- Inclement weather, vessel ranging, and vacant berths mainly impacted operations at our Eastern Cape Ports.

- Operations at the Port of Richards Bay were primarily affected by poor weather this week.

ii. Cape Town

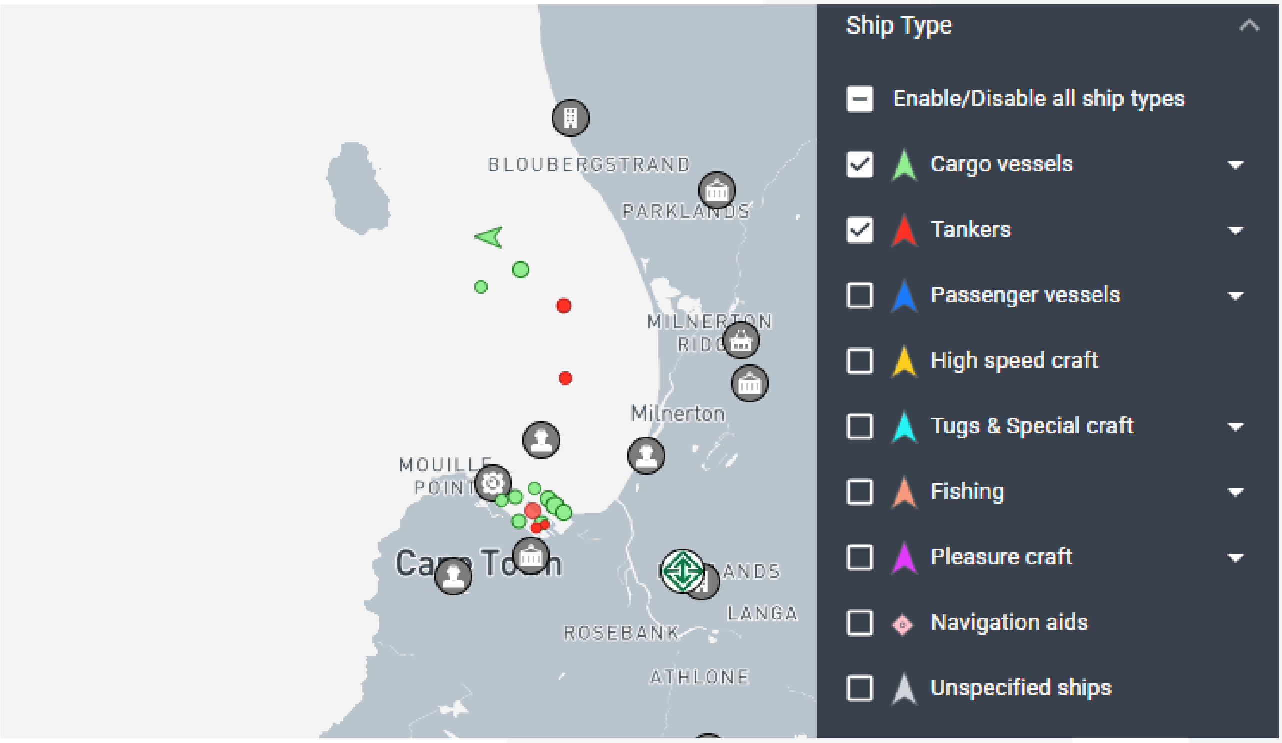
On Thursday, CTCT recorded two vessels at berth and zero at anchor, as equipment challenges and vacant berths proved to be the primary operational constraints. On the landside, between Monday and Thursday, the terminal managed to service at least 4 583 trucks while handling approximately 231 rail units. On the waterside, the terminal executed approximately 6 824 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 35%**, **reefers at 24%**, and **empties at 56%**. Additionally, the terminal operated with **eight STS cranes**, **21 RTGs**, and **59 hauliers** towards the end of the week. Crane LC4 was given to the technical team for planned maintenance.

The latest reports from Maersk suggest that the planned swap between the Maersk Cubango 521E and Hedwig Schulte 522E will no longer occur. As a result, Maersk Cubango will now omit Cape Town and proceed directly to Coega to ensure schedule recovery on the vessel schedule. Regarding imports, cargo onboard the Hedwig Schulte will arrive as originally scheduled, while cargo onboard the Maersk Cubango will be discharged in Coega and transhipped via an alternative service to the final destination. As for exports, all bookings currently on the Hedwig Schulte 522E will be amended back to the Maersk Cubango, with no change in arrival dates into IME. All bookings currently on the Maersk Cubango 521E ex Coega will be amended to the Hedwig Schulte, with no change in arrival dates into IME. All Cape Town bookings on the Maersk Cubango 521E will be rolled to the Hedwig Schulte.

On Wednesday, CTMPT recorded three vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 1 078 tons and 408 container moves on the waterside. On the landside, 140 trucks were processed during the same period. Stack occupancy was recorded at 1% for general cargo, 10% for reefers, and 0% for empties. Towards the end of the week, the terminal operated with two cranes and four straddle carriers. Crane LM400 went out of commission so the technical team could work on the machine’s spreader.

Between 2 and 8 June, the FPT terminal handled seven vessels: two multi-cargo, one dry bulk, one container, one vessel containing steel, and two layby vessels. Berth occupancy during this period was recorded at 65%. The terminal planned to handle nine more vessels between 9 and 15 June, with another six vessels scheduled between 16 and 22 June. Inclement weather and the late arrival of cargo and transporters accounted for the most significant operational constraints during this period.

Figure 7 – Cape Town vessel view (per vessel group)



Source: Marine Traffic. Updated 16/06/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, with one vessel at anchor. Stack occupancy was **53%** for **GP containers** and **50%** for **reefers**. Between Monday and Thursday, the terminal executed at least 4 004 gate moves and 55 rail moves on the landside. The **average TTT** for the week was **~52 minutes** (**↓17%**, w/w) and an average **staging time** of **~45 minutes** (**↑22%**). Additionally, the terminal moved over 3 655 TEUs across the quay on the waterside during the same period. The terminal had **five STS cranes** and **16 RTGs** available towards the end of the week.

Pier 2 had two vessels on berth and two at anchorage on Thursday, as equipment breakdowns and adverse weather prevented optimal operational performance this week. Stack occupancy was recorded at **61%** for **GP containers** and **66%** for **reefers**. The terminal operated with **nine gangs** and moved over 6 000 containers across the quay between Monday and Thursday on the waterside. Approximately 6 616 gate moves were executed on the landside during the same period. The **average TTT** for the week was **~59 minutes** (**↑6%**, w/w), and the average staging time was **~56 minutes** (**↑30%**). Approximately 899 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **73** and **78** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **85%** during this period. Towards the end of the week, the most notable crane absentees were Cranes 520, 526, and 528.

Durban's MPT terminal recorded one vessel at berth on Thursday and none at outer anchorage. Stack occupancy for containers was recorded at 24%, the reefer stack at 55%, and the breakbulk stack at 2%. In the preceding 24 hours, 149 containers were handled on the waterside. On the landside, 167 container trucks were serviced at a TTT of ~21 minutes. During this period, three cranes, seven reach stackers, seven forklifts, and 24 ERFs were in operation. The third crane returned to operations earlier this week after undergoing a gearbox replacement the previous week.

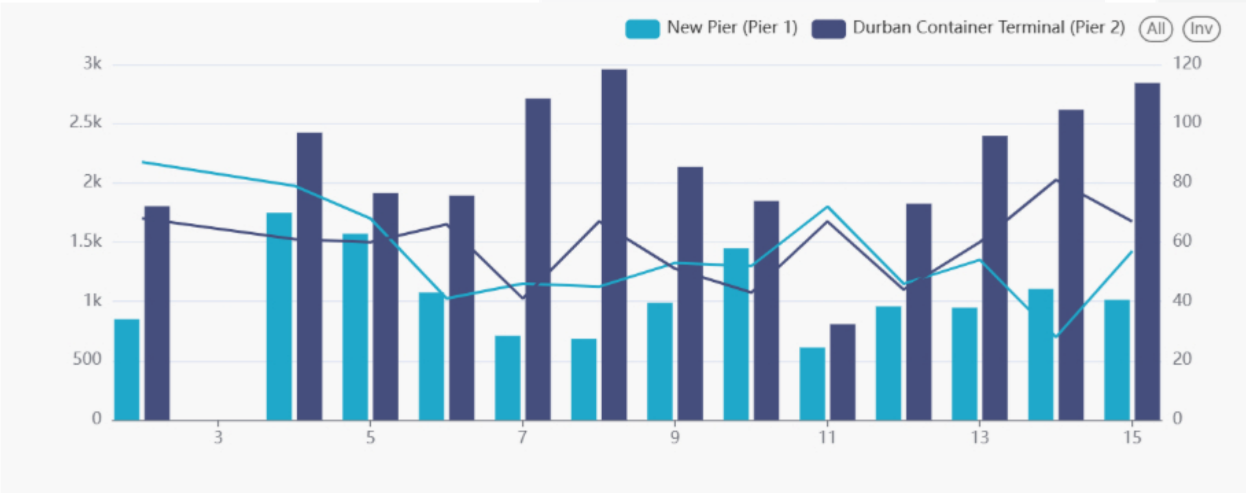
The Maydon Wharf MPT recorded one vessel at berth and zero at anchorage between Wednesday and Thursday. On the waterside, the terminal managed to handle 5 640 tons, while 70 trucks, containing approximately 3 414 tons, were serviced on the landside. During the same period, the agri-bulk facility recorded one vessel at berth and one at anchor. The terminal managed to handle 7 096 tons on the waterside and handled 74 trucks, containing approximately 2 604 tons, on the landside.

On Thursday, the Ro-Ro terminal in Durban recorded zero vessels on the berth, with none at anchorage. In the preceding 24 hours, the terminal handled 819 road units and 150 units on rail on the landside while no units were handled on the waterside. Overall stack occupancy was 39%, 10% at Q&R, and 40% at G-berth. During this period, the terminal had 96 high-and-heavy (abnormal loads) on hand and managed to handle 23.

Due to maintenance operations, Berth IV7 at the Island View terminal is expected to be out of commission for the next week. Operational challenges are anticipated as a result. The berth is expected to be recommissioned around 24 June.

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.

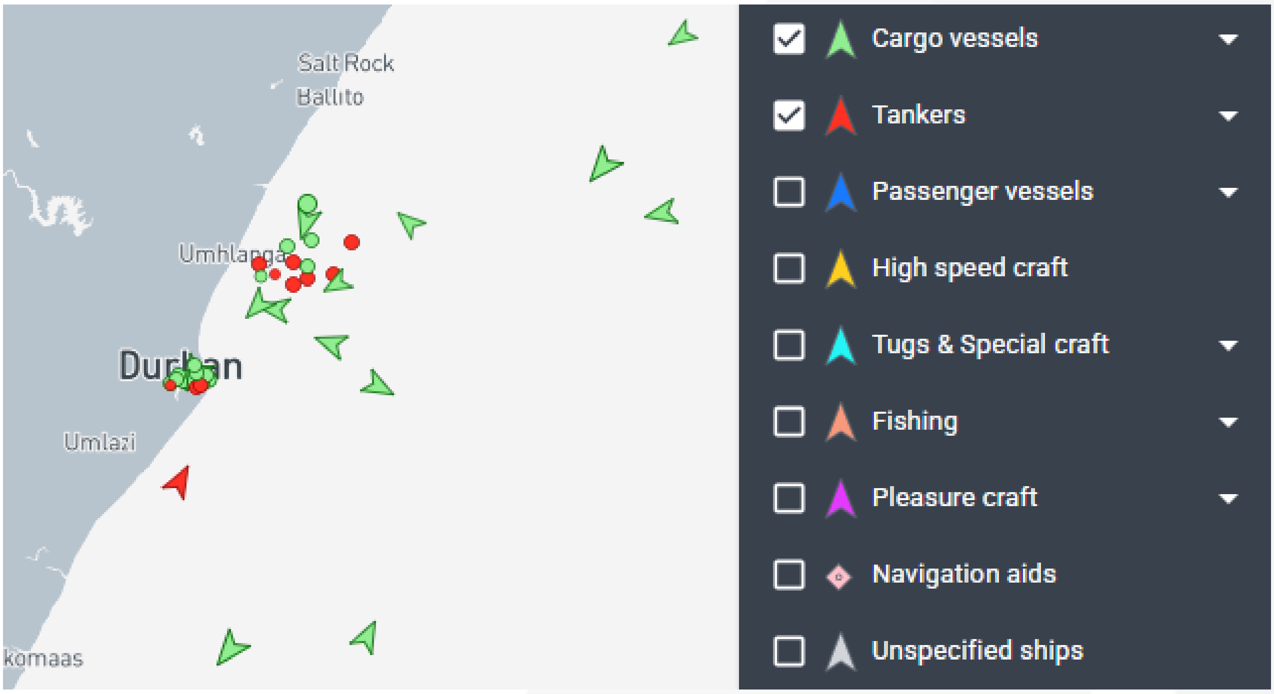
Figure 8 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 15/06/2025.

The queue of container vessels waiting outside Durban has increased slightly from last week. On Monday evening (16 June), **two** container vessels were waiting outside at anchorage for Pier 1, **four** for Pier 2, and **none** for Point. The queue of dry (**five**), liquid (**seven**), and breakbulk (**one**) vessels has also increased from last week. The following snapshot shows the current status quo:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 16/06/2025 at 14:00.

iv. Richards Bay

On Thursday, the Port of Richards Bay had nine vessels at anchor and ten on the berth, translating to three at DBT, five at MPT, two at RBCT, and none at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources towards the end of the week. Additionally, the port was closed for periods throughout the week due to adverse weather conditions. There was a significant drop in coal throughput, as the daily average for the week decreased to around **100 873 tons** (**↓43%**, w/w). An average of **21 trains** (up by **two** from last week) were serviced on the landside, slightly below the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded three vessels on berth and zero at anchor, with no vessels drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. Stack occupancy figures were recorded at 30% for reefers, 85% for reefer ground slots, and 60% for the general stack. Despite conceding seven hours during this period for bunkering, two hours to vessel ranging, and three hours to vacant berths, the terminal handled approximately 1 921 TEUs and 242 reefers on the waterside. Approximately 725 trucks were processed on the landside at a TTT of ~27 minutes. Towards the end of the week, the terminal had eight STS cranes, 26 RTGs, and 76 hauliers in service.

The latest reports from Maersk suggest that the Fleur N will omit Coega due to congestion and schedule delays experienced in West Africa.

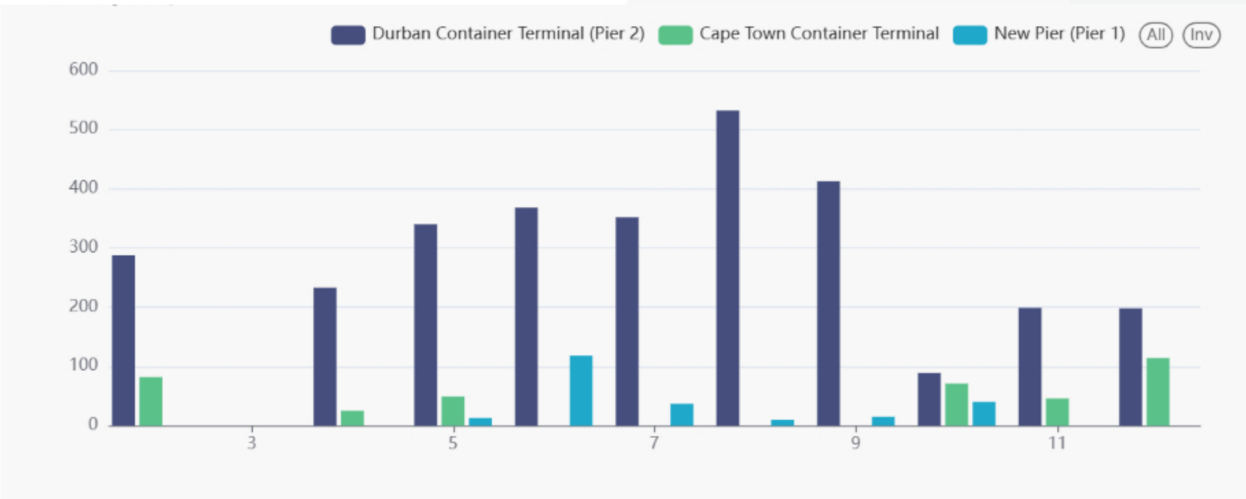
On Thursday, GCT had one vessel at berth and one at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 128 trucks were processed at a TTT of ~17 minutes on the landside, while 493 TEUs and 156 reefers were handled across the quay on the waterside. Stack occupancy was recorded at 35% for the general stack, 45% for reefers, and 46% for reefer ground slots.

On Thursday, the Ro-Ro terminal had one vessel on berth and none at outer anchorage. In the 24 hours before, the terminal handled 2 600 units, resulting in a stack occupancy figure of 15%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that cable theft continues on the Capital Park line near Pretoria, which is impacting operations. Additionally, three or four trees fell over and onto the line between Durban and Mooi River between Tuesday and Wednesday due to the adverse weather experienced. The line was cleared up on Wednesday morning, upon which trains started running on the line as the day progressed. Towards the end of the week, DCT Pier 2 had 183 ConCor units on hand with a dwell time of 72 hours and 261 over-border units with a dwell time of 64 days.

Figure 10 – TFR: Rail handled (Pier 1, Pier 2, and CTCT)



Source: Calculated using data from Transnet, 2024. Updated 15/06/2025.

In the last week (*16 to 22 June*), rail cargo on the ConCor line out of Durban was reported at **1 641** containers, down ↓**53%** from the previous week's **3 468** containers.

vii. Transnet Wage Agreement with recognised Unions

After an extended negotiation period, Transnet has successfully concluded a three-year wage agreement with its recognised labour unions, UNTU and SATAWU. The agreement, facilitated through the CCMA, provides for annual increases of ↑**6%** over each year from 2025/26 to 2027/28, amounting to a cumulative ↑**18%** increase. Notably, the deal extends beyond basic salaries to include enhancements to related benefits such as pension contributions, medical aid subsidies, and housing allowances. Transnet highlights that this agreement ensures labour stability, enabling the company to concentrate on operational improvements, financial performance, and long-term strategic objectives. Crucially, it provides medium-term operational certainty and averts the risk of strikes – events that, as previously reported, typically require **11 days** of recovery for each day of downtime. This outcome represents a significant and welcome trade, transport, and logistics development.

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

Table 6 – International inbound and outbound cargo from OR Tambo

Flows	02-Jun	03-Jun	04-Jun	05-Jun	06-Jun	07-Jun	08-Jun	Week
Volume inbound	494 366	239 060	389 876	364 935	292 551	733 732	2 155 489	**4 670 009**
Volume outbound	151 113	189 326	201 206	154 770	167 259	222 227	1 398 988	**2 484 889**
Total	**645 479**	**428 386**	**591 082**	**519 705**	**459 810**	**955 959**	**3 554 477**	**7 154 898**

Courtesy of ACOC. Updated: 15/06/2025.

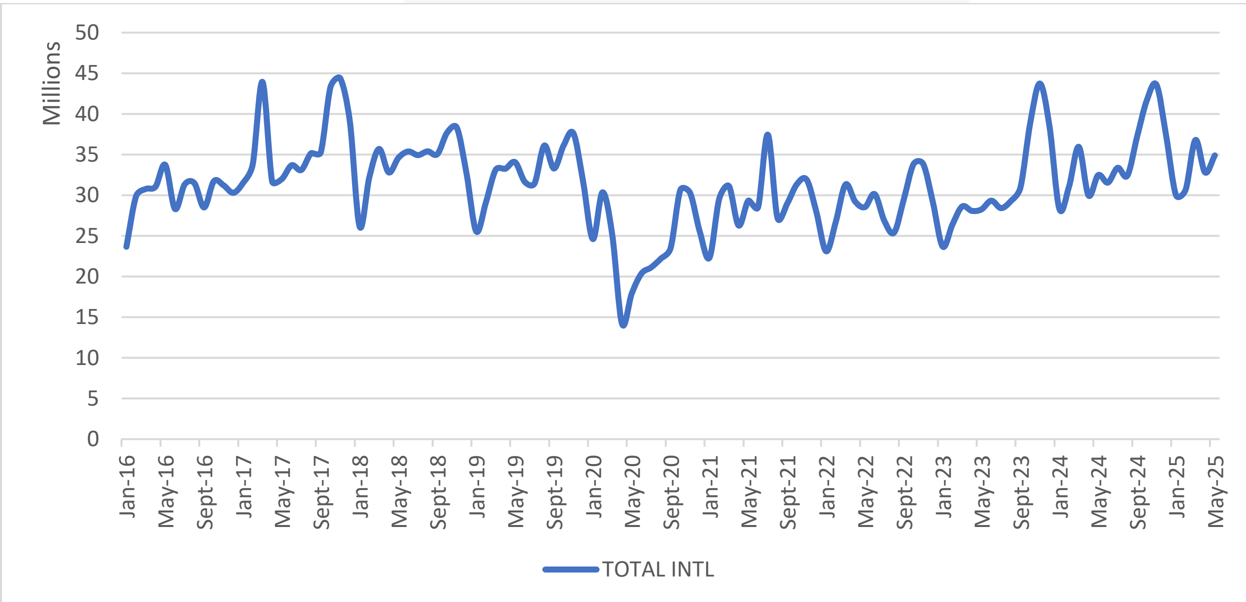
In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **667 144 kg** inbound (**↑16%**, w/w) and **354 984 kg** outbound (**↑8%**). This week, we saw a significant increase after the reduction last week. Consequently, the current volumes are significantly up on last year's levels (**↑21%**, y/y) and above the comparative levels of pre-pandemic 2019 (**↑13%**). Moreover, the year-to-date cargo is now **↑5%** above the same period last year, which points to continued growth for the air cargo sector.

For the full month of May:

- Johannesburg increased by **↑9%** (m/m) versus April and by **↑6%** (y/y) versus 2024.
- Cape Town decreased by **↓3%** (m/m), but increased by **↑12%** (y/y) versus 2024.
- Durban decreased by **↓7%** (m/m), but increased by **↑25%** (y/y) compared to 2024.

The following figure shows the international air cargo flows to and from all terminals since the start of 2016:

Figure 11 – International cargo for OR Tambo – volumes per month (kg millions)



Calculated from ACOC. Updated: 15/06/2025.

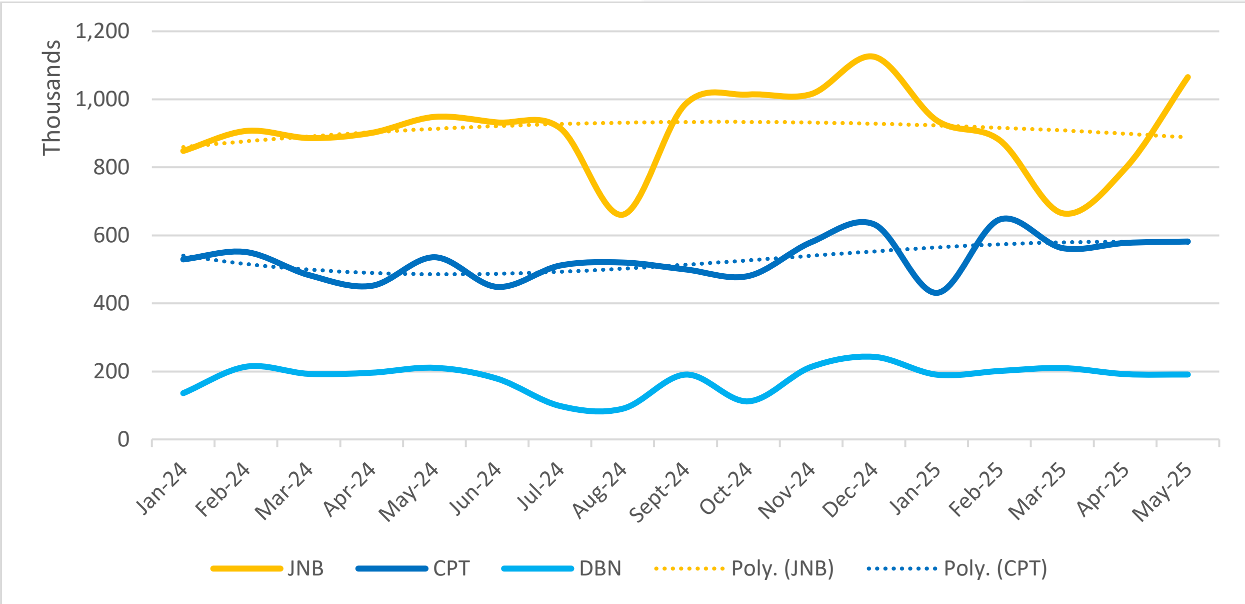
b. Domestic air cargo

For the full month of May, domestic volumes handled at our three main terminals indicate the following:

- Johannesburg increased by **↑34%** (m/m) versus April and by **↑12%** (y/y) versus 2024.
- Cape Town increased by **↑1%** (m/m) and by **↑9%** (y/y) versus 2024.
- Durban decreased by **↓1%** (m/m) and **↓9%** (y/y) compared to 2024.

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

Figure 12 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 15/06/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*16 to 22 June*), cargo movements along the N4 corridor decreased for road and were stable for rail. The following notes summarise the recent developments:

- Truck volumes through the border post at **1 530 HGVs per day** (**↑6%**, w/w).
- Queue times were unchanged at an average of **2,9 hours**' at the border, as the average processing time decreased slightly to around **2,5 hours** (**↓4%**) per crossing.
- The rail to Maputo was stable at an average of **nine trains daily**. Sugar trains from Eswatini decreased slightly to around **one train a day**.

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

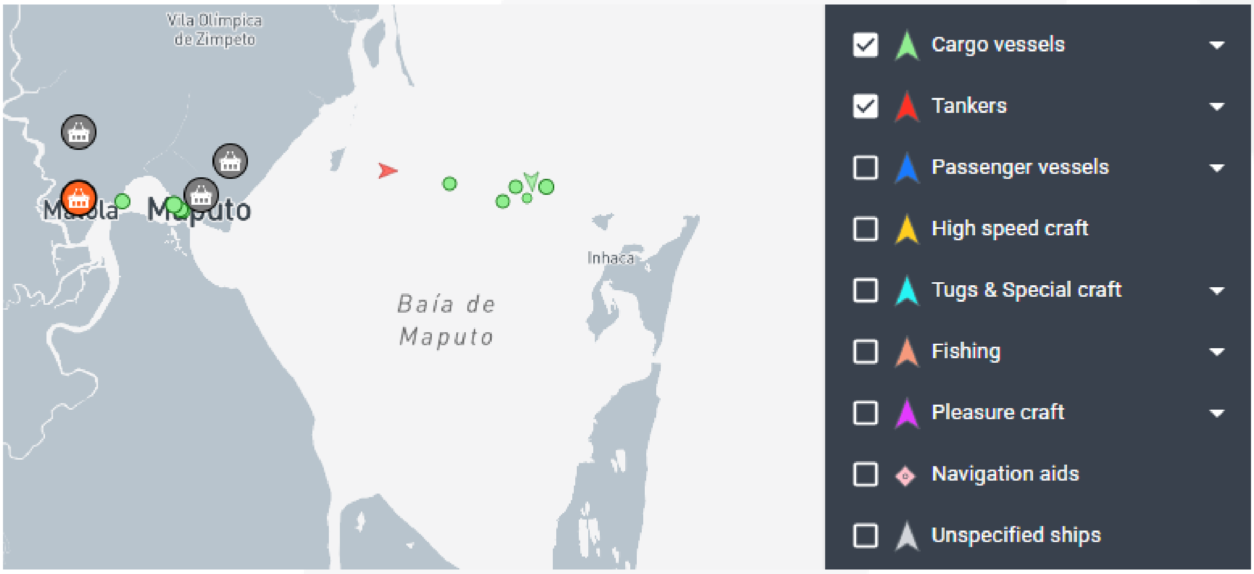
Table 7 – Lebombo border post update

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**
09-Jun-25	1 324	1 228	112	11	65	4	217	**12**	10	1	1	1 324
10-Jun-25	1 268	974	212	28	51	2	200	**8**	6	*	2	1 268
11-Jun-25	1 562	1 239	254	36	72	51	244	**12**	10	1	1	1 562
12-Jun-25	1 496	1 109	244	42	74	27	361	**9**	8	*	1	1 496
13-Jun-25	1 547	1 168	255	47	97	35	336	**0**	*	0	*	1 547
14-Jun-25	1 693	1 217	312	31	85	48	283	**0**	*	*	*	1 693
15-Jun-25	1 578	1 220	201	50	67	40	253	**0**	*	*	*	1 578
% of design capacity	**100%**	**97%**	**114%**	**n/a**	**146%**	**59%**	**14%**	**29%**	**85%**	**11%**	**31%**	**100%**
% change (d/d)	-7%	0%	-36%	61%	-21%	-17%	-11%	n/a	n/a	n/a	n/a	-7%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 15/06/2025.
** = not reported*

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

Figure 13 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 16/06/2025 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 **remained constant** from last week, while transit time decreased by around **10 minutes**.
- The median border crossing times at South African borders increased by nearly **an hour**, averaging **~9,3 hrs** (**↑11%**) for the week.

- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**).

1. **Zambia Revenue Authority (ZRA) systems downtime:**
    a. On Monday, it was confirmed that the ZRA Central Processing Centre had been offline since the previous Thursday.
    b. Transporters were urged to exercise patience while the issue was being resolved.
2. **Zimbabwe anti-smuggling inspections:**
    a. FESARTA has called on its members to report any challenges faced with the Zimbabwe Republic Police (ZRP) Anti-Smuggling Unit, particularly when vehicles are referred for inspection in Harare.
    b. Direct contact with the FESARTA CEO is encouraged to expedite interventions.
3. **Security alert – copper theft on DRC's N1 route:**
    a. Three separate incidents of copper theft occurred within a 24-hour window on the N1 southbound near Likasi, DRC.
    b. While one load was successfully recovered, transporters using this corridor are strongly advised to operate in convoys to mitigate security risks.

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

Table 8 – Delays[8] 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	460	27,1	7,0	27,0	13 800	3 220
Beitbridge	Zimbabwe-SA	437	8,8	1,6	8,5	13 110	3 059
Groblersbrug	SA-Botswana	240	18,6	1,3	18,4	7 200	1 680
Martin’s Drift	Botswana-SA	217	2,3	0,4	2,2	6 510	1 519
Kopfontein	SA-Botswana	218	9,4	1,2	9,2	6 540	1 526
Tlokweng	Botswana-SA	22	0,6	0,2	0,3	660	154
Vioolsdrift	SA-Namibia	30	4,1	1,4	4,1	900	210
Noordoewer	Namibia-SA	20	2,7	0,5	2,4	600	140
Nakop	SA-Namibia	30	2,8	0,2	2,5	900	210
Ariamsvlei	Namibia-SA	20	0,9	0,3	0,6	600	140
Skilpadshek	SA-Botswana	253	4,1	1,5	1,6	7 590	1 771
Pioneer Gate	Botswana-SA	58	0,0	0,0	0,0	1 740	406
Lebombo	SA-Mozambique	1 440	2,9	0,5	2,5	43 200	10 080
Ressano Garcia	Mozambique-SA	1 377	1,2	0,2	1,1	41 310	9 639
Sum/Average		**4 822**	**6,1**	**1,2**	**5,7**	**144 660**	**33 754**

Source: TLC, FESARTA, & Crickmay, week ending 08/06/2025.

[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.

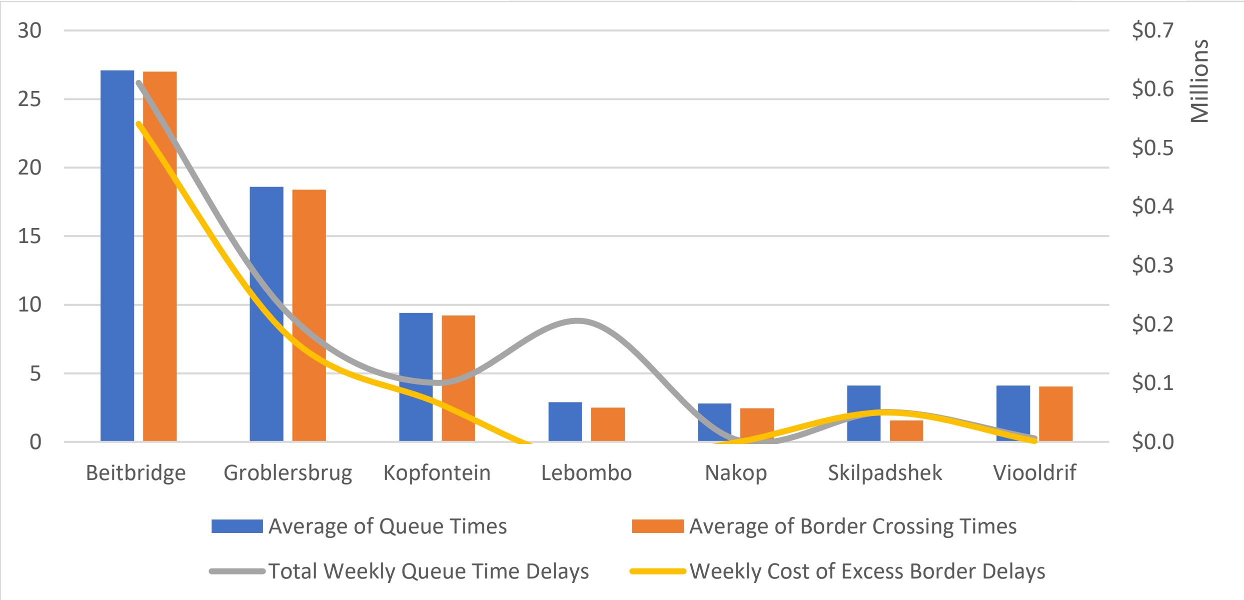
Table 9 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	12,4	2,0	12,2	9 600	2 240
Central Corridor	798	0,2	0,2	0,6	23 940	5 586
Dar Es Salaam Corridor	1 819	7,6	0,9	7,6	54 570	12 733
Maputo Corridor	2 817	2,1	0,3	1,8	84 510	19 719
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 666	7,7	1,3	8,2	109 980	25 662
Northern Corridor	2 817	1,5	0,1	1,5	92 520	21 588
Trans Caprivi Corridor	341	2,0	0,6	1,2	10 230	2 387
Trans Cunene Corridor	100	2,6	0,6	2,4	3 000	700
Trans Kalahari Corridor	116	14,4	0,6	8,7	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	**13 021**	**4,2**	**0,6**	**4,1**	**398 640**	**93 016**

Source: TLC, FESARTA, & Crickmay, week ending 08/06/2025.

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

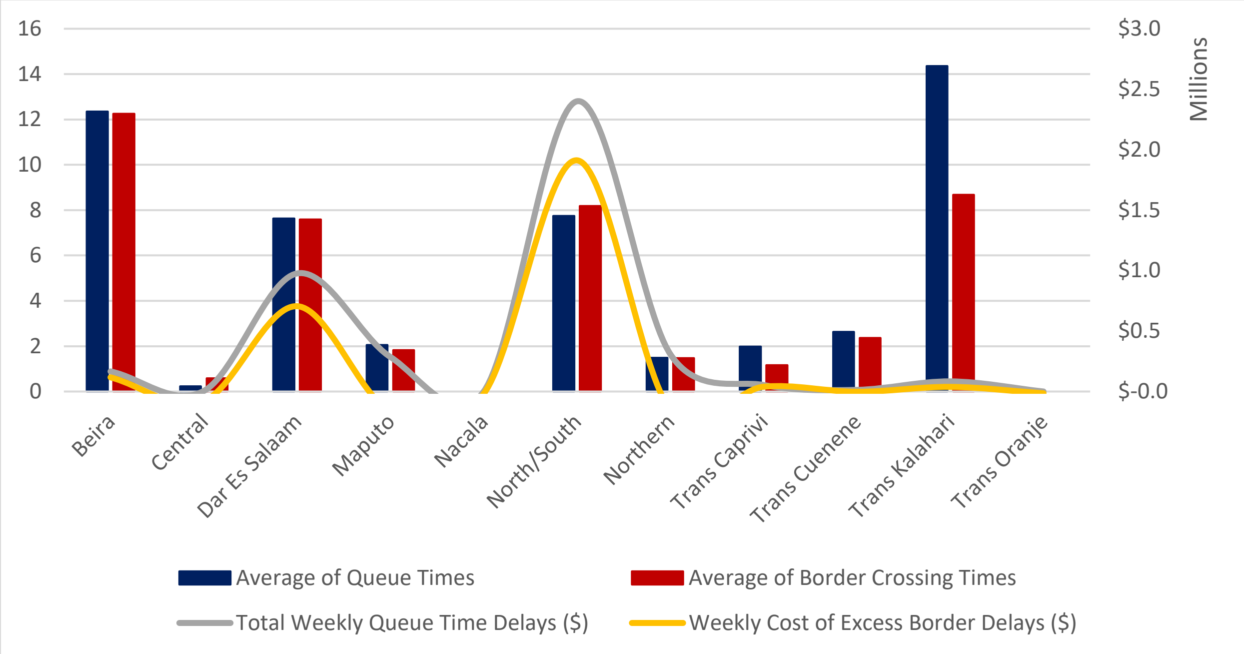
Figure 14 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 08/06/2025.

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

Figure 15 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 08/06/2025.

In summary, cross-border queue time averaged **~4,2 hours** (**no change** from the previous week's **~4,2 hours**), indirectly costing the transport industry an estimated **$4,3 million** (**R77 million**). Furthermore, the week's average cross-border transit times also hovered around **4,1 hours** (down by **~0,1 hours** from the **~4,2 hours** recorded in the previous report), at an indirect cost to the transport industry of **$2,4 million** (**R43 million**). As a result, the total indirect cost for the week amounts to an estimated **~$6,7 million** (**R120 million**, up by **~R5 million** or **↑4,7%** from **~R115 million** in the previous report).

4. International Update

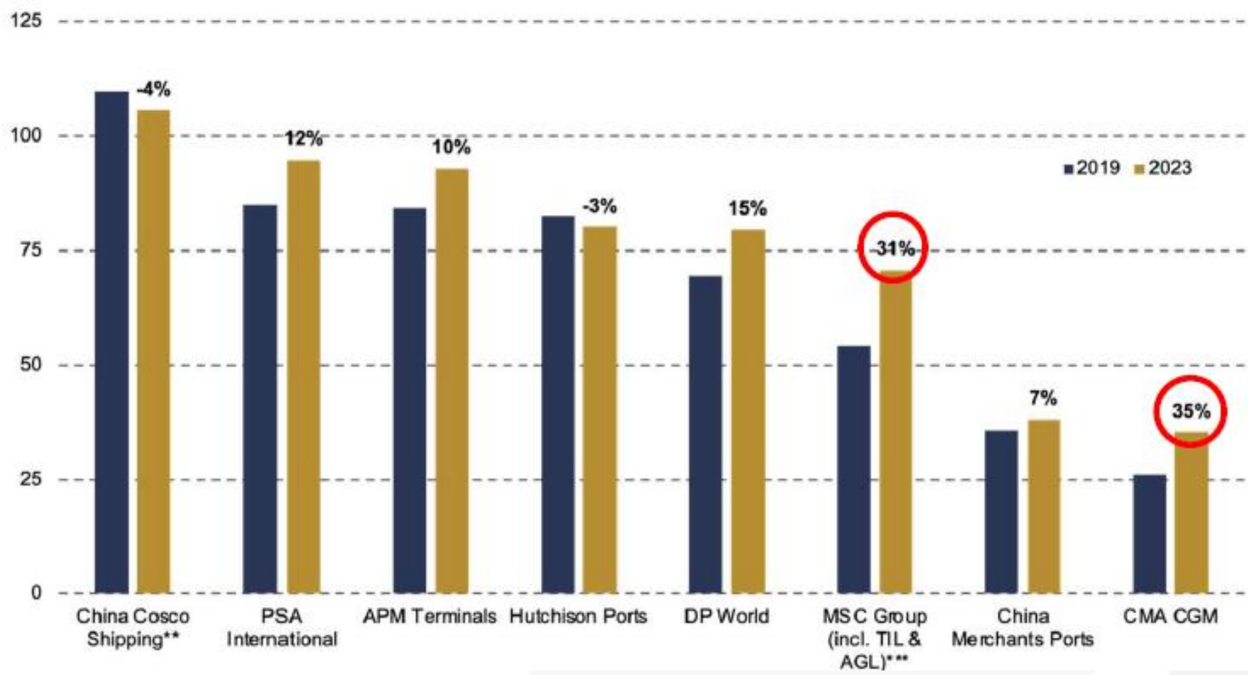
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry and **(b)** the global aviation industry.

a. Global shipping industry

i. Global terminal operations

Recent developments in the terminal operator landscape reflect a shift toward hybrid Global Terminal Operators (GTOs), with carrier-backed players increasingly dominating the market. GTOs historically expanded through early globalisation, but growth has recently been driven by mergers and acquisitions, particularly by hybrid models that combine liner shipping with terminal operations. This strategy has allowed companies like MSC to rapidly ascend the global rankings. Leveraging record COVID-era profits, MSC acquired key terminal assets across West Africa, Europe, Latin America, and Asia, doubling its portfolio and positioning itself to overtake traditional GTOs. As a result, three of the top five terminal operators are now hybrid models, raising concerns about competitive equity for independent operators. The accompanying chart visually illustrates these recent shifts:

Figure 16 – Port Throughput & Growth: Hybrid GTOs out-paced market in recent years (2019-2023)



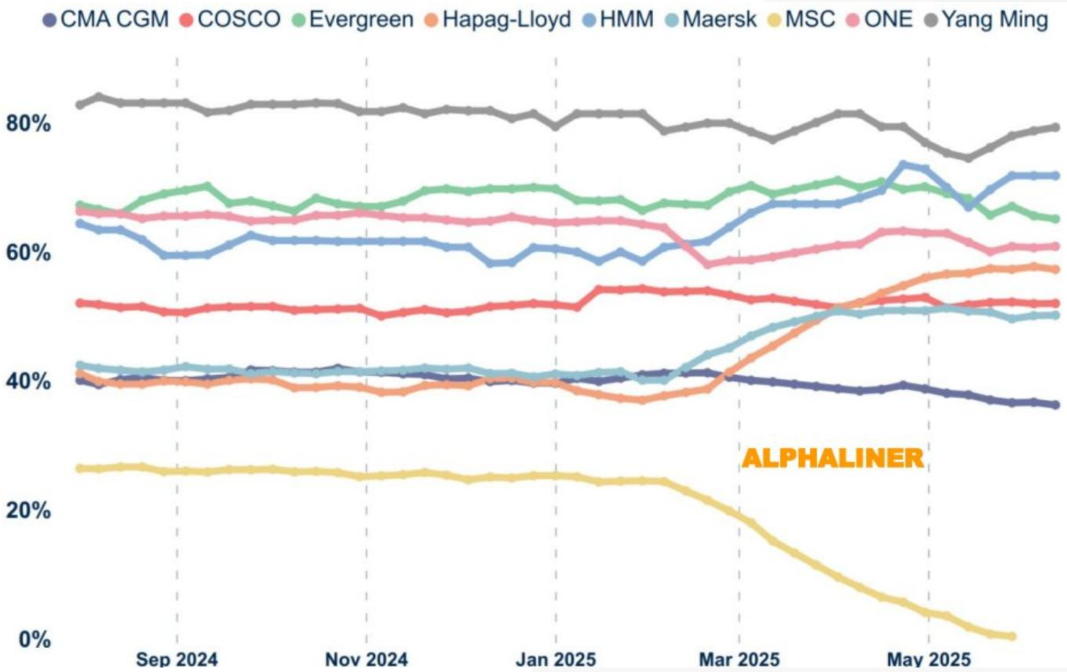
Source: Drewry

If MSC's acquisition of Hutchison is finalised, MSC's hybrid model will become the largest terminal operator globally. Meanwhile, Drewry reports a worsening global container throughput outlook, with the rolling four-quarter average growth rate moderating to **↑5,8%**.

ii. Global shipping alliances

The dissolution of the 2M Alliance, marked by the MSC ISABELLA's final voyage, signifies the end of the traditional alliance structure between Maersk and MSC. This realignment allows both carriers to pursue independent East–West strategies. In the reshaped landscape, Maersk has partnered with Hapag-Lloyd to form the Gemini Cooperation, prompting Hapag-Lloyd's exit from THE Alliance, which has since been restructured into the Premier Alliance. Alphaliner's latest assessment shows OCEAN Alliance remains the largest, with **4,37 million TEU**, followed by Gemini (**3,69m TEU**) and Premier (**2,42m TEU**). MSC, now operating independently, deploys **3,27m TEU**. However, Alphaliner cautious that comparing alliances has become less straightforward in 2025 due to divergent operational models, including standalone and slot exchange arrangements, which we have seen evident in the market.

Figure 17 – Main carriers' contribution to their alliance (% share)



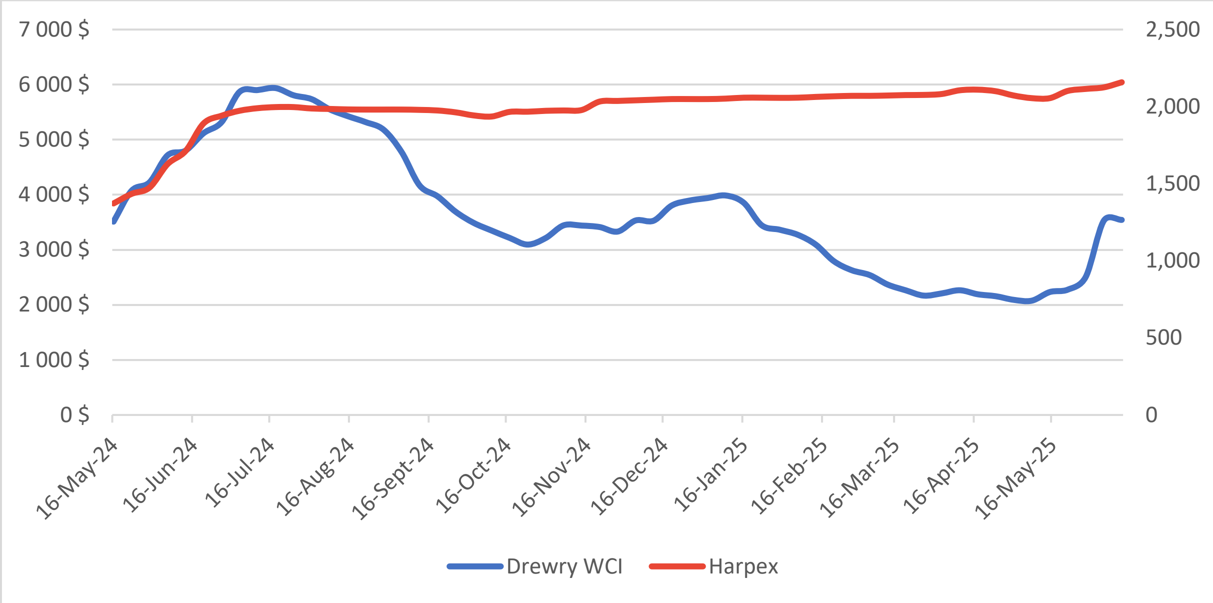
Source: Alphaliner

iii. Global freight rates and container inventory

After increasing by an average of **$363 per week** since this time last month, Drewry's "*World Container Index*" was relatively stable this week, increasing by **↑0,5%** (or **$16**) to **$3 543 per 40-ft container**.[10] The recent surge has mainly been caused by President Trump's "pause" on import tariffs, which led to the resumption of US-bound traffic after the initial collapse of Transpacific volumes. Charter markets have continued to increase, as the *Harper Petersen Index* (Harpex) traded around **2 158 points** (**↑1,6%**) on Friday.[11] This correlates to around **$74 000 a day** for vessels with around **8 500 TEU capacity**. The smaller vessels have stayed relatively stable in the last few weeks, as the surge has come from bigger vessels.

[10] Drewry. 12/06/2025. World Container Index.
[11] Harpex. 13/06/2025. Harper Petersen & Co Charter Rate Index.

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



Source: Calculated from Drewry & Harpex

b. Global air cargo industry

In the high-frequency metrics from World ACD, air cargo trends for early June 2025 (Week 23) show modest growth in chargeable weight (**↑2%**, y/y) and stable overall rates. Africa stands out with the strongest year-on-year growth in chargeable weight (**↑8%**) and an above-average rate increase (**↑4%**), indicating rising demand and tighter supply in African markets. Regionally, capacity to/from Africa has contracted by **↑2%** compared to the same period last year, contributing to upward pressure on rates. Globally, capacity remains constrained (**↓6%**, y/y), particularly in Europe (**↓10%**) and the Middle East/South Asia (**↓5%**).

Figure 19 – Regional changes in capacity, chargeable weight, and rates (weeks 2 to 5, % change)

Origin Regions last 2 to 5 weeks	Capacity[1]			Chargeable weight[1]			Rate[1]		
WORLD ACD	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		+4%	+8%		-7%	-2%		+1%	+7%
Asia Pacific		-0%	+3%		-4%	+5%		+5%	-2%
C. & S. America		-1%	-1%		-5%	+3%		+1%	-1%
Europe		-1%	+2%		-10%	-4%		+2%	+1%
M. East & S. Asia		+1%	+6%		-5%	-6%		+4%	-10%
North America		+1%	+0%		-5%	-2%		+0%	-1%
Worldwide		+0%	+2%		-6%	+0%		+4%	-1%

Source: World ACD

On the pricing side, worldwide rates – based on a full-market average of spot and contract rates – were relatively stable in week 23, rising just **↑1%** to **$2,44/kg**, exactly their level this time last year, with spot rates edging up **↑2%** (w/w) to **$2,63/kg**. Regionally, rates show mild gains in Asia Pacific and the Middle East, while other regions remain flat or negative.

ENDS[12]

[12]**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.*