SAVINO DEL BENE®
Global Logistics and Forwarding Company

CARGO MOVEMENT UPDATE

Date: 7 December 2025

Key Notes

- An average of **~11 851 TEUs** was handled per day, with **~11 174 TEUs** projected for next week.
- TNPA Oct: TEUs are up by **↑11%** (m/m) and by **↑4%** (y/y). Total bulk: **↑21%** (m/m), but **↓2%** (y/y).
- Rail cargo handled out of Durban was reported at **2 824** containers, up by **↑53%** from last week.
- Cross-border queue: **↑0,2 hrs**; transit: **↑0,3 hrs**; SA borders: **~12,0 hrs** (**↓6%**); SADC: **~6,6 hrs** (**↑16%**).

i. Port operations - General

- At our container terminals, an average of **11 851 TEUs** was handled daily, an increase from **10 780 TEUs** the previous week.
  - For the coming week, a decreased average of **~11 174 TEUs** (**↓6%**) is predicted to be handled.
- Port operations were mainly impacted by inclement weather, vacant berths, as well as equipment challenges and shortages.
  - More than 50 operational hours were conceded at the Port of Cape Town this week due to adverse weather, as well as system issues, equipment breakdowns and shortages, which prevented optimal performance in Durban.
  - Vacant berths and adverse weather ensured operational delays at our Eastern Cape Ports, while marine equipment challenges and poor weather proved to be the primary operational constraints in Richards Bay.
- The latest reports from TFR suggest that the annual shutdown of the ConCor line concluded last week, with trains resuming operations on the rail network.
  - No significant incidents were reported on the ConCor this week; however, some locomotive failures prevented optimal rail performance on the line between City Deep and Mafikeng.
- The latest reports from Maersk and Hapag-Lloyd confirm that East-West Suez transits remain suspended due to Red Sea security concerns.
- Additionally, Maersk will revise Origin and Destination Documentation Fees, as well as Import and Export Service charges for shipments to/from South Africa and neighbouring countries, with effect from 1 January 2026 until further notice.

ii. TNPA: November update

- Container throughput in November increased by **↑11%** (m/m) and annually by **↑4%** (y/y).
- Total bulk cargo increased monthly by **↑21%** (m/m), but decreased annually by **↓2%** (y/y).
- Vehicles decreased monthly by a substantial **↑54%** (m/m) and annually by **↑28%** (y/y).
- Transnet Port Terminals handled **366 thousand containers** and **18,7 million metric tonnes** of **bulk** cargo during November, which is significantly above the levels of the record throughput of last month.
- Vehicle throughput also increased substantially after last month's low number of **61 311 units** moved through our ports, coming in at **94 213 units**.
- Liquid bulk (**↓16%**, y/y) and breakbulk (**↓18%**) are down annually; whereas containers (**↑4%**), dry bulk (**↑1%**) and vehicle throughput (**↑28%**) have increased compared to November 2024.
- When reading the cyclical figures with the year-to-date figures, the positive trend continues, as South Africa's bulk cargoes are up by **↑5% YTD**.
- However, despite the improved cyclical numbers, YTD port volumes remain down by **↓5,3%** versus 2019.

- For containers, the YTD has improved to **↑2,7%**, after being down by **↓4,2%** just five months ago in June.
- Projections point to the fact that the container sector will come just short of **4,5 million TEUs** for the year, which has resulted from some good improvements in the system, notably **(1)** new equipment, **(2)** improved processes across the marine, the quayside, and the landside, and **(3)** improved collaboration across the industry.

iii. Post operations – Performance Metrics

- CTCT operated with **7-8 STS cranes**, between **32 and 34 RTGs**, and approximately **59 hauliers** available.
- CTCT handled an average of **~1 113 TEUs** (**↓20%**, w/w) containers a day, with an average of **~1 974** (**↑77%**) projected this week.
- DCT Pier 1 had between **four and five** (out of seven) **STS cranes** and around **16-19** (out of 25) **RTGs** available for the most significant part of the week.
  - STS crane availability thus roughly sat at 64% for the week, with RTG availability roughly sitting at 70%.
- DCT Pier 1 handled **~2 220 TEUs** (**↑74%**, w/w) containers a day, with an average of **~1 620** (**↓27%**) projected this week.
  - The **TTT** for the week averaged **~49 minutes** (**↑26%**, w/w), and the average **staging time** was **~34 minutes** (**↑55%**).
- DCT Pier 2 handled **~5 584 TEUs** (**↑11%**, w/w) containers a day, with an average of **~4 224** (**↓24%**) projected this week.
  - The terminal operated with **10 to 11 gangs.**
  - The **average TTT** for the week was to **~93 minutes** (**↓15%**, w/w), and the average staging time was **~103 minutes** (**↓25%**).
- The number of available straddle carriers fluctuated between **60** and **63** out of a fleet complement of **108** this week.
  - Thus, the availability figure sat roughly at **57%** during this period.
- The queue of container vessels waiting outside Durban has decreased significantly this week.
  - On Monday evening (8 December), **one** container vessel was waiting outside at anchorage for Pier 1, **none** for Pier 2, and **one** for Point.
  - The queue of dry (**eight**), liquid (**seven**), and breakbulk (**five**) vessels, on the other hand, has increased substantially from last week.
- South Africa's other container terminals produced the following results for the week at all other terminals:
- Ngqura Container Terminal handled an average of **~1 710 TEUs** (**↓3%**, w/w) containers a day, with an average of **~2 010 TEUs** (**↑18%**) projected this week.
- Port Elizabeth Container Terminal handled an average of **~321 TEUs** (**↓12%**) containers a day, with an average of **~393 TEUs** (**↑22%**, w/w) projected this week.
- Other terminals handled a combined average of **~903 TEUs** (**↓7%**, w/w), with an average of **~952 TEUs** (**↑6%**) projected this week.
- At RBCT, the daily average coal throughput for the week increased significantly again and averaged around **175 000 tons** (**↑35%**, w/w) a day.
  - An average of **19 trains** was serviced on the landside (down by **one** from last week), and slightly below the target (of 22 trains).

- In the last week (*1 to 7 December*), rail cargo on the ConCor line out of Durban was reported at **2 824** containers, up by **↑53%** from the previous week's **1 725** containers.

iv. Lebombo border post update

In the last week (*1 to 7 December)*, movements along the N4 corridor decreased slightly for road transport, while reporting for rail transport was sparse. With the upcoming festive season, cargo movement across the border as well as immigration on the South African side remains a concern, as processing continues to be at a less than desired speed. Consequently, several instances of congestion was recorded this week.

- Truck volumes through the border post decreased to around **1 281 HGVs per day** (**↓5%**, w/w).
- Queue times increased slightly to an average of **~6,9 hours** at the border.
- The average processing time also increased slightly at an average of **~6,5 hours** per crossing.

v. SADC cross-border road freight update

- Overall, the average queue time increased by approximately **15 minutes** from last week, while transit time increased by about **20 minutes**.
- The median border crossing times at South African borders decreased by roughly **three-quarters of an hour**, averaging **~12,0 hrs** (**↓6%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) increased by **nearly an hour**, averaging **~6,6 hrs** (**↑16%**).

1. **South Africa – border performance deterioration:**
   a. **Longer queues and crossing times** reported at **Beitbridge, Skilpadshek, and Groblersbrug** over recent weeks.
   b. SARS will introduce **extended operating hours** at **Skilpadshek, Groblersbrug, and Kopfontein** before year-end, in response to rising congestion.
   c. Transporters again highlight the **absence of a formal festive-season SOP**, a recurring challenge each year.
2. **Kazungula – queue management issue:**
   a. FESARTA intervened after Botswana Police halted a compliant driver despite **verified documentation**.
   b. Several similar incidents occurred the same day but were **resolved following FESARTA's engagement** with authorities.
3. **Zambia – new overloading fee structure:**
   a. A 5% axle tolerance and **499 kg GVM tolerance** now apply.
   b. When overloaded, **cargo must be redistributed**; charges apply on the excess margin.
   c. If redistribution is impossible, authorities will impose a **mileage-based fine**, calculated to the exit border for transit loads.
4. **ZRA – ASYCUDA world access update:**
   a. From **30 November**, the **new Desktop Launcher** is mandatory.
   b. The **old launcher is disabled**, and traders must download the updated version to retain system access.

- In summary, cross-border queue time averaged **~7,3 hours** (up by **~0,2 hours** from the previous week's **~7,1 hours**), indirectly costing the transport industry an estimated **$23,7 million** (**R404 million**). Furthermore, the week's average cross-border transit times also hovered around **~7,2 hours** (up by **~0,3 hours** from the **~6,9 hours** recorded in the previous report), at an indirect cost to the transport industry of **$15,8 million** (**R269 million**). The total indirect cost for the week amounts to an estimated **~$39,4 million** (**R674 million**, up by **↑6,9%** from the **~R630 million** in the previous report.

vi. Global trade

- UNCTAD's *Global Trade Update* projects that global trade in goods and services will surpass **$35 trillion** in 2025, marking an approximate **↑7%** annual increase (**~$2,2 trillion**) compared with 2024 if current estimates hold.
    - This growth continues through the second half of the year, with goods contributing roughly **$1,5 trillion** and services about **$750 billion** to the overall expansion.
- While momentum persists into Q4, growth is expected to moderate – projected at approximately **↑0,5%** for goods and **↑2%** for services.
    - Importantly, after earlier increases driven partly by price inflation, trade growth is expected to be volume-led as goods prices decline, signalling resilient underlying demand.
- Regionally, **East Asia and Africa exhibited the strongest export and import growth**, and **South–South trade expanded around ↑8%**, illustrating a shift toward diversified and intra-regional flows.
- Sectoral patterns reveal robust manufacturing growth, led by electronics, and solid agricultural trade, while automotive and fossil-fuel sectors lag.
    - Persistent **trade imbalances remain elevated**, and geopolitical fragmentation, including friendshoring and nearshoring, continues to reshape global trade patterns.
- Looking ahead, UNCTAD highlights **risks to 2026 growth** owing to slower global expansion, higher trade costs, and policy uncertainty.

vii. Global shipping industry

- The latest container throughput figures from *Container Trade Statistics* (CTS) show that container volume increased slightly in October and is also up versus the corresponding period last year.
    - The total throughput is up by **↑2,8%** monthly and up by **↑2,1%** (y/y) annually.
- Regionally, it was a mix, as some trade lanes experienced increases in October (notably Far East imports at **↑10,1%** and European exports at **↑4,3%**, respectively.
- The global price index (dry and reefer combined) decreased again in October by **↓3,9%** monthly and remains significantly down by **↓22%** yearly.
- Throughput in October reached **16,3 million TEUs** – some **500 thousand containers** below the record level achieved last in August this year.
- Sub-Saharan African trade over the same period, with a **↓2,9%** (m/m) increase in containers imported, and a **↓1,5%** (m/m) decrease in containers exported:
    - Despite the slight drop in bi-directional trade, the longer-term trend has been overwhelmingly positive across the last four years.
    - Indeed, yearly SSA imports remain significantly up (**↑9,9%**, y/y) – with exports up by **↑8,0%** (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.
- The Week 49 *Linerlytica* report highlights persistent **downward pressure on freight rates**, as carriers were unable to enforce planned general rate increases amid weak demand relative to supply.
- Container demand (measured in TEU-miles) remains below capacity growth, contributing to a **looming multi-year oversupply challenge**.

- The global orderbook has reached a **record 11,5 million TEU**, with **4,5 million TEU** scheduled for delivery in 2028, emphasising continued fleet expansion despite market headwinds.
- The potential **strategic sale of Israeli carrier ZIM** over the next six months faces geopolitical and valuation hurdles, with bids from Hapag-Lloyd and interest from MSC and Maersk, and union opposition complicating prospects.
- Global freight rates increased for the first time in four weeks, with the "*World Container Index*" (WCI) up by **↑6,7%** (or **$121**) to **$1 927 per 40-ft container**.
  - The most notable increases were to the US, with spot rates from Shanghai to Los Angeles climbing **↑8%** to **$2 256**, while those to New York rose **↑6%** to **$2 895**.
- Elsewhere, the charter market remains stable, with the *Harpex Index* trading at **2 181 points**.

viii. South African air cargo industry

- International air cargo to South Africa were significantly reduced this week.
- The daily average of air cargo handled amounted to **~517 000 kg** inbound (**↓25%**, w/w) and **~435 000 kg** outbound (**↑4%**).
  - Despite the reduction, the current levels continue to trend significantly above last year's level (**~↑14%**) and the comparative levels of pre-pandemic 2019 (**~↑14%**), as volumes in December typically settle down cyclically.

ix. International air industry

- Global air cargo markets remained resilient, with **CTKs up ↑4,1%** (y/y) **in October** and **capacity rising ↑5,1%** (y/y).
- Growth persisted into November at **↑5%** (y/y), although Week 48 softened slightly (**↓3%**, w/w) due to the North American holiday effect.
- Regional performance was uneven, led by substantial gains in **Africa and Asia-Pacific**, while North and Latin America lagged. Rates continued to firm, reflecting improving demand fundamentals.