

# Cargo Movement Update #206<sup>1</sup>

## Date: 4 October 2024

### Weekly Snapshot

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

| Flows                     | Current <sup>2</sup> |        |        | Previous <sup>3</sup> |        |        | Growth |
|---------------------------|----------------------|--------|--------|-----------------------|--------|--------|--------|
|                           | Import               | Export | Total  | Import                | Export | Total  |        |
| Port Volumes (containers) | 20 614               | 31 075 | 51 689 | 25 603                | 30 900 | 56 503 | ↓9%    |
| Air Cargo (tons)          | 4 141                | 3 170  | 7 311  | 3 943                 | 3 080  | 7 023  | ↑4%    |

### Monthly Snapshot

Figure 1 – Cyclical<sup>4</sup> cargo volume, year on year (% growth)

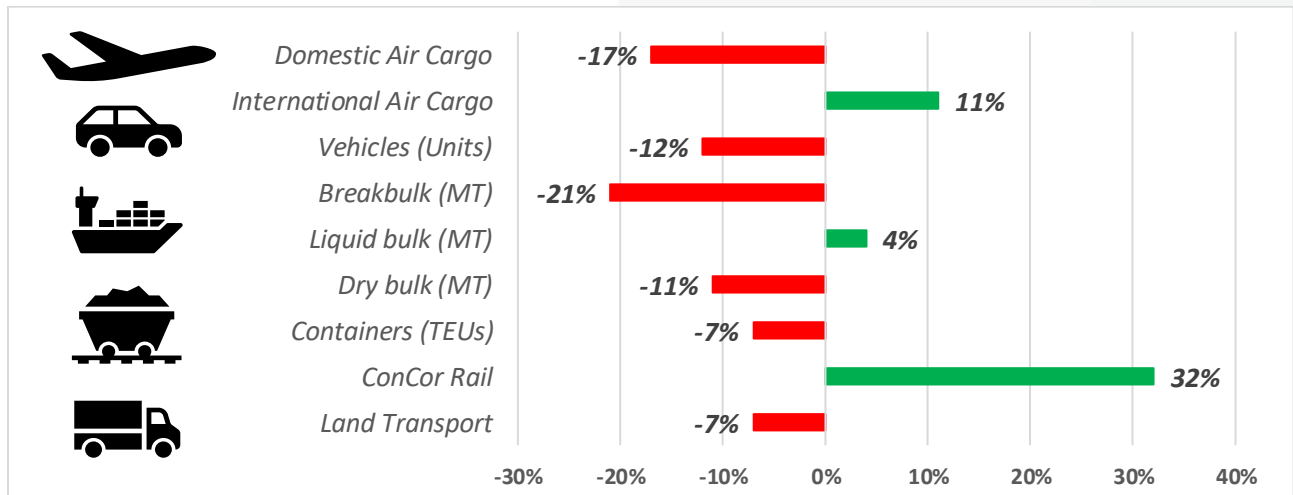
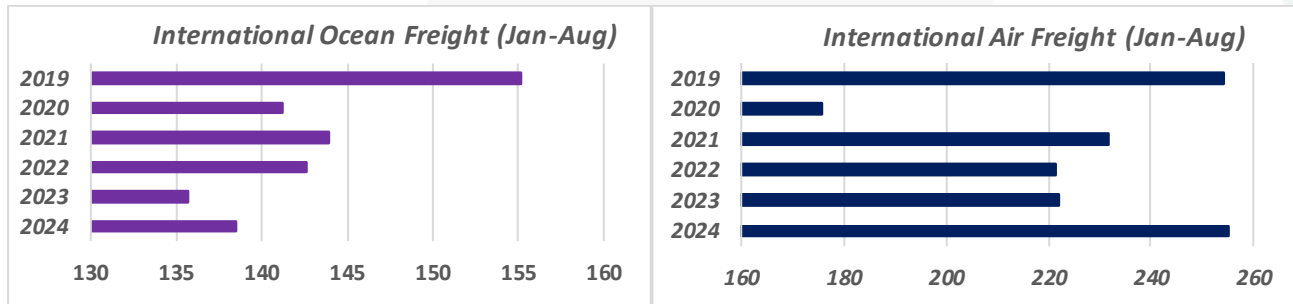


Figure 2 – Year-to-date flows 2019-2024<sup>5</sup>: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



### Key Notes

- An average of **~7 384 containers** was handled per day, with **~7 913 containers** projected for next week.
- Rail cargo handled out of Durban was reported at **3 147 containers**, up **↑12%** from last week.
- Cross-border queue: **↓0,1 hrs**; transit: **↑0,6 hrs**; SA borders: **10,0 hrs (↓32%)**; SADC: **2,9 hrs (↓41%)**.
- SARS August trade stats – exports: **↓5,0% (m/m)**; imports **↑1,8%**; YTD trade surplus: **R89 billion**.
- Container rates are down by **↓5,5% (or \$202)**, trading at **\$3 489/40-ft**. Since August, the WCI is **↓\$2 150**.
- IATA reports a double-digit increase for the 9<sup>th</sup> consecutive month for air cargo during August (**↑11,4%**).

<sup>1</sup> This update contains an overview of air, sea, and road freight to and from South Africa in the last week. This report is the 206<sup>th</sup> update.

<sup>2</sup> 'Current' means the last seven days (a week's) of available data.

<sup>3</sup> 'Previous' means the preceding 8-14 days (a week) of available data.

<sup>4</sup> 'Monthly' means the last months' worth of available data compared to the same month in the previous year. All metrics: Aug vs Aug.

<sup>5</sup> 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 contains a consolidated overview of the South African logistics network and the current state of international trade. Operationally, an average of **7 384 containers** was handled per day, down compared to the **8 072 containers** last week. Port operations this week were mainly constrained by inclement weather conditions, equipment breakdowns and shortages. Strong winds, high swells, and vessel ranges represented the main operational constraints at the Port of Cape Town. At the same time, adverse weather and equipment breakdowns ensured operational delays in Durban this week. Our Eastern Cape Ports lost around 50 operational hours due to strong winds, while around 33 operational hours were conceded at the Port of Richards Bay this week due to challenges associated with the marine service. Earlier this week, TNPA initiated a Request for Information (RFI) process for a Multi-Purpose Terminal (MPT) at the Port of Mossel Bay's Quay 4 precinct. Additionally, the latest reports suggest that COSATU has informed NEDLAC of their planned national strike on Monday, 7 October, which may impact port operations.

Globally, the ILA strike on the US East Coast and Gulf ports has far-reaching effects on global supply chains and shipping capacity. Though currently paused, the disruption may continue if negotiations do not yield a long-term solution. The longer the strike drags on, the more severe the impact will be on both the shipping industry and the broader economy. The global fleet loss and congestion at East Coast ports could lead to rising freight rates, logistical bottlenecks, and delayed shipments worldwide. The outcome of ongoing negotiations will be crucial in determining the extent of these impacts in the coming weeks. Elsewhere, global congestion has slightly improved to **9% of the fleet**, with **2,8 million TEU** affected, but the US strike aftermath is expected to impact fluidity. In South Africa, the Port of Durban saw slight congestion relief. At the same time, global container freight rates continue to decline, with spot – and charter rates following a downward trend. Other developments included the Deutsche Bahn supervisory board approving DSV's bid for DB Schenker.

The daily average of air cargo handled at ORTIA in the previous week amounted to **591 565 kg** inbound (**↑5%**, w/w) and **452 816 kg** outbound (**↑3%**), resulting in an average of **1 044 381 kg**. This week's increase again sees the average cargo breaching a ton a day, with comparative figures significantly up versus prior years, as the industry is around **↑33%** versus September 2023 and still up again versus pre-pandemic levels (**↑16%** versus September 2019). Domestically, the tables have turned. Consolidated domestic air freight volumes for our three primary airports are collectively down versus last month (**↓17%**, m/m) and last year (**↓49%**, y/y). International air cargo remains robust, as IATA reported a ninth consecutive month of double-digit growth, with global cargo tonne-kilometres (CTK) increasing by **↑11,4%** (y/y) and international CTKs rising by **↑12,4%** (y/y), driven by growth across all regions. While global air cargo capacity grew by **↑6,2%** (y/y), reaching record levels, the global air cargo yield continued its moderate upward trend despite falling fuel prices. Looking ahead, worldwide air cargo rates and tonnages increased in the final full week of September and the month as a whole, ahead of what is expected to be a strong peak season.

In the regional cross-border road freight trade, the average queue times slightly decreased by around **20 minutes** from last week, as the transit times increased by around **half an hour** from last week. However, some of the voluminous borders experience slight improvements in cross-border flows. The median border crossing times at South African borders decreased by nearly **five hours**, averaging **10,0 hrs** (**↓32%**, w/w) for the week. In contrast, the greater SADC region (excluding South African controlled) decreased by around **two hours** and averaged **~2,9 hrs** (**↓41%**, w/w). On average, four SADC border posts last week took around a day to cross – Beitbridge, Groblersbrug, Kasumbalesa (the worst affected, taking **around two** to cross from both sides), and Mutukula OSBP. Other developments included **(1)** slow operations at Beitbridge, **(2)**

Zimbabwe transit fuel duties, **(3)** extended queues at Skilpadshek, and **(4)** temporary suspension of access to DRC Customs servers.

In concluding this edition, while the trade surplus figures reported this week offer encouraging headlines, the reality of declining trade volumes remains a concern. The trade value would have been significantly higher if not for persistent disruptions in South Africa's logistics network. Challenges such as equipment failures and inefficiencies have dampened the country's trade capacity. That said, there are promising signs of recovery. Key metrics related to productivity and efficiency have shown improvement, and it appears that the tide of equipment failures has begun to subside, suggesting the general decline in logistics performance may have been arrested. However, industry operators should remain vigilant, especially in light of local and international labour actions, which could create new stress points in an already constrained environment. Maintaining operational fluidity and the ability to absorb shocks will be crucial in ensuring the integrity of South Africa's trade and logistics sectors moving forward.

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## 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 and projections for the next seven days.

Table 2 – Container Ports – Weekly flow reported for 28 September to 4 October<sup>6</sup>

| 7-day flow reported (28/09/2024 – 04/10/2024) |  |                                    |                |
|---|--|------------------------------------|----------------|
| TERMINAL                                      | NO. OF CONTAINERS <sup>7</sup> TO DISCHARGE (IMPORT) | NO. OF CONTAINERS TO LOAD (EXPORT) | CHANGE (w/w %) |
| DURBAN CONTAINER TERMINAL PIER 1:             | 3 370  | 5 657                              | ↓12%           |
| DURBAN CONTAINER TERMINAL PIER 2:             | 7 504  | 14 243                             | ↑2%            |
| CAPE TOWN CONTAINER TERMINAL:                 | 4 100  | 4 010                              | ↓28%           |
| NGQURA CONTAINER TERMINAL:                    | 4 037  | 5 042                              | ↓19%           |
| GQEBERHA CONTAINER TERMINAL:                  | 1 603  | 2 123                              | ↑52%           |
| <b>TOTAL:</b>                                 | <b>20 614</b>  | <b>31 075</b>                      | <b>↓9%</b>     |

Source: Transnet, 2024. Updated 04/10/2024.

Table 3 – Container Ports – Weekly flow forecasted for 5 to 11 October

| 7-day flow forecast (05/10/2024 – 11/10/2024) |   |                                    |                            |
|---|---|------------------------------------|----------------------------|
| TERMINAL                                      | NO. OF CONTAINERS TO DISCHARGE (IMPORT) | NO. OF CONTAINERS TO LOAD (EXPORT) | FORECAST VS ACTUAL (w/w %) |
| DURBAN CONTAINER TERMINAL PIER 1:             | 5 374                                   | 5 435                              | ↑20%                       |
| DURBAN CONTAINER TERMINAL PIER 2:             | 10 855                                  | 11 585                             | ↑3%                        |
| CAPE TOWN CONTAINER TERMINAL:                 | 4 809                                   | 5 155                              | ↑23%                       |
| NGQURA CONTAINER TERMINAL:                    | 3 191                                   | 7 476                              | ↑17%                       |
| GQEBERHA CONTAINER TERMINAL:                  | 477                                     | 1 033                              | ↓59%                       |
| <b>TOTAL:</b>                                 | <b>24 706</b>                           | <b>30 684</b>                      | <b>↑7%</b>                 |

Source: Transnet, 2024. Updated 04/10/2024.

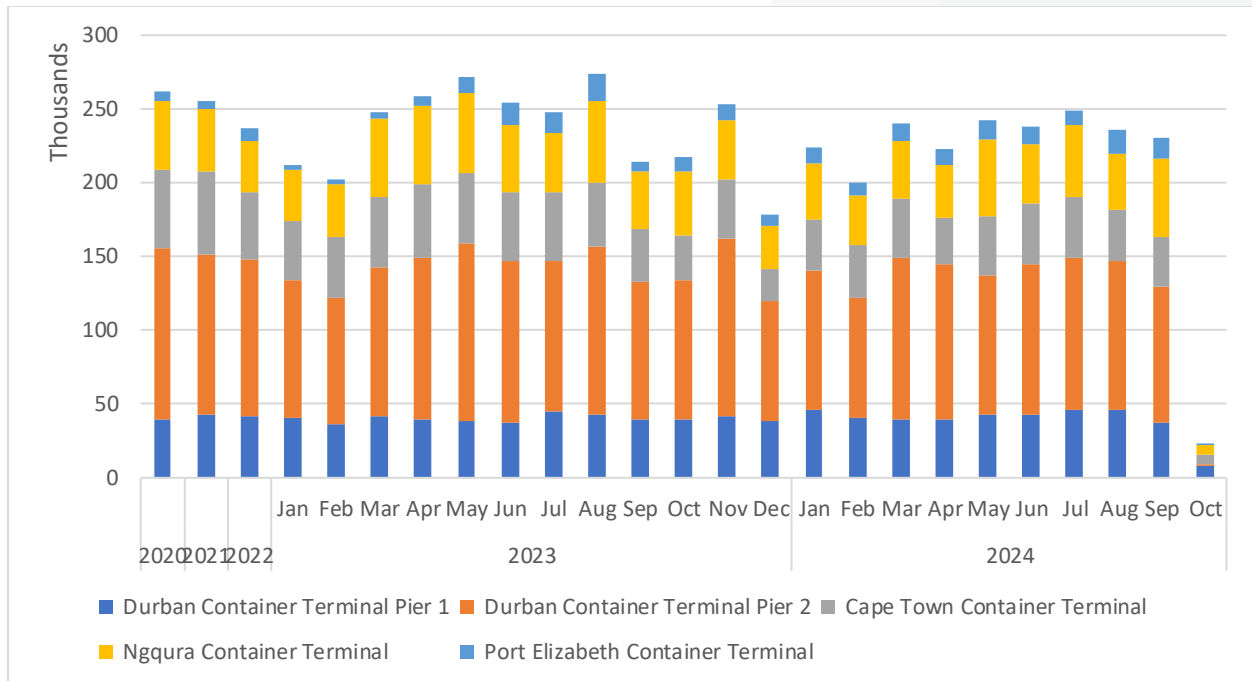
A decreased average of **~7 384 containers (↓9%)** was handled per day for the last week (28 September to 4 October, Table 2), compared to the projected average of **~8 560 containers (↓14% actual versus projected)** noted in last week's report. For the coming week, a slightly increased average of **7 913 containers (↑7%)** is predicted to be handled (5 to 11 October, Table 3) in a best-case scenario. Port operations this week were mainly constrained by inclement weather conditions, equipment breakdowns, and shortages.

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

<sup>6</sup> It remains important to note that a large percentage (approximately 35% according to the latest year-to-date TNPA figures) of containers is neither imported nor exported but rather consists of empties and transshipments.

<sup>7</sup> As mentioned before, the measurement is noted as containers (20' and 40'). Incidentally, Transnet works on a ratio of approximately 1,4 TEUs per container, and this figure will probably increase as the shift towards more 40' containers continues. Elsewhere, the US uses 1,5 to 1,8, depending on the port. The privately operated FPT terminal in Cape Town works on 1,6.

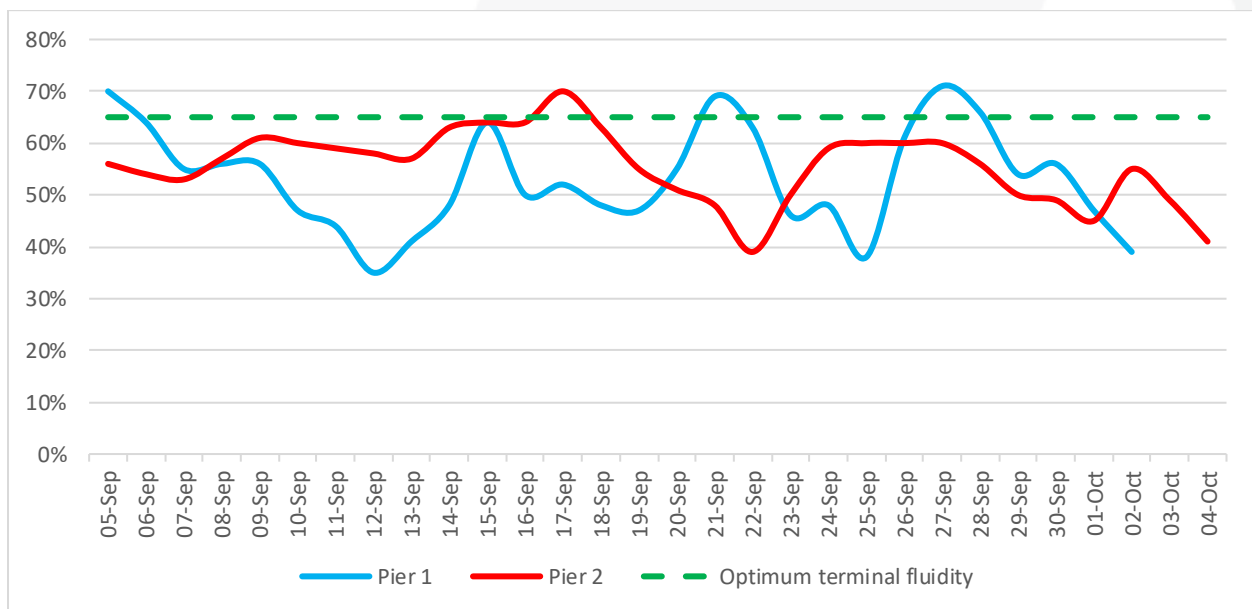
Figure 3 – Monthly flow reported for total container movement (containers April 2020 to present, m/m)



Source: Calculated using data from Transnet, 2024, and updated 04/10/2024.

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

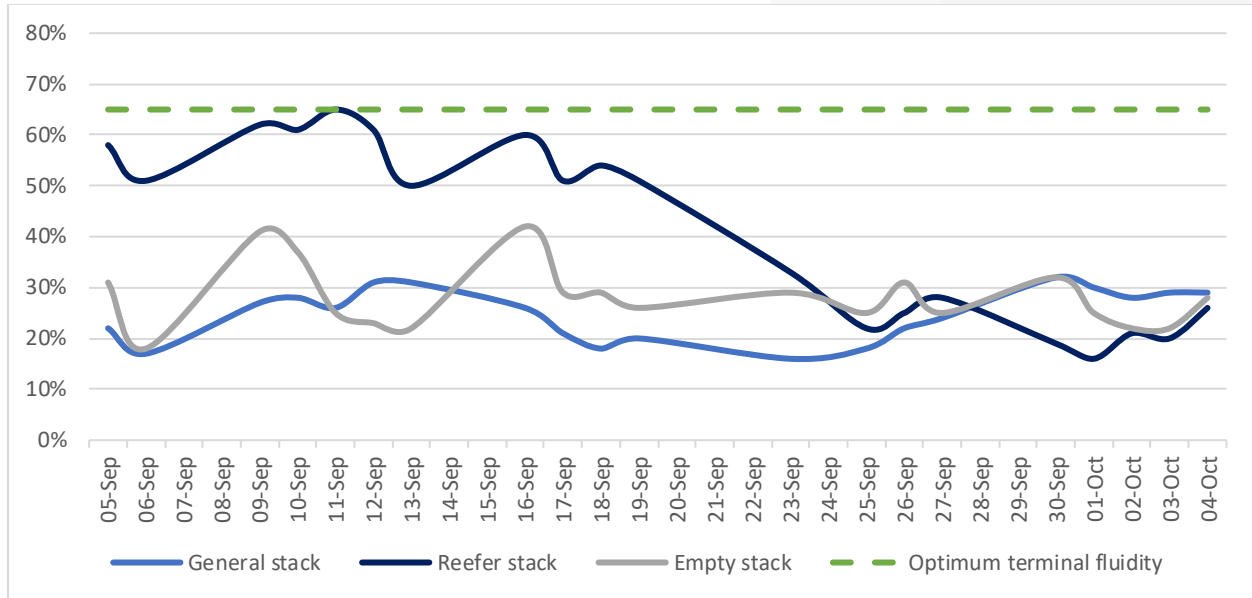
Figure 4 – Stack occupancy in DCT, general-purpose containers (5 September to present; a day on the day)



Source: Calculated using data from Transnet, 2024, and updated 04/10/2024.

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

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



Source: Calculated using data from Transnet, 2024, and updated 04/10/2024.

## b. Summary of port operations

### i. Weather and other delays

- Strong winds, high swells, and vessel ranging represented the main operational constraints at the Port of Cape Town
- Adverse weather and equipment breakdowns ensured operational delays in Durban this week.
- Our Eastern Cape Ports lost around 50 operational hours due to strong winds.
- Around 33 operational hours were conceded at the Port of Richards Bay this week due to challenges associated with the marine service.

### ii. Cape Town

On Thursday, CTCT recorded three vessels at berth and one at anchor, as strong winds prevented optimal performance at the terminal this week. This week (except Tuesday), on the landside, the terminal managed to service 1 535 trucks while handling 79 rail units. On the waterside, the terminal executed approximately 1 774 container moves across the quay during the same period. Stack occupancy for **GP containers** was recorded at **29%**, reefers at **20%**, and empties at **22%**. Additionally, the terminal operated with **eight STS cranes, 25 RTGs, and 55 hauliers** towards the end of the week. Crane LC3 remained out of commission this week.

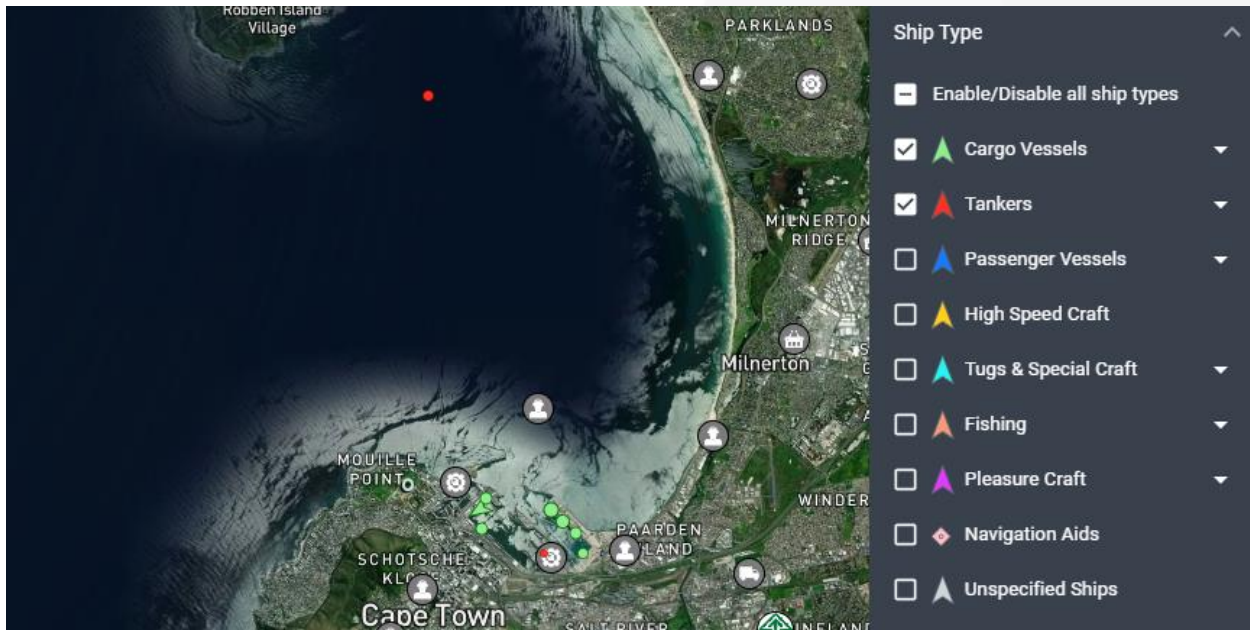
On Wednesday, CTMPT recorded one berthed vessel and another one at anchor. In the preceding 24 hours, the terminal executed 280 moves across the quay. On the landside, 234 trucks were processed during the same period. Towards the end of the week, stack occupancy was recorded at 23% for general cargo, 6% for reefers, and 1% for empties. Towards the end of the week, TPT reported two cranes available for operations at the terminal. The spares for crane LM550 are expected to arrive before the weekend, and the crane should return to service mid-next week.

The FPT terminal serviced seven vessels from 23 to 29 September 2024: three multi-purpose, one container, one breakbulk, and two dry bulk vessels. Berth occupancy during this period was recorded at 39%. FPT planned to handle nine vessels between 30 September and 6 October, with another five scheduled between

7 and 13 October. Adverse weather, mainly rain, accompanied by the late arrival of cargo, accounted for most delays at the terminal this week.

At midday on Friday, there was **one container** vessel at inner anchorage in Cape Town, with the following snapshot of the port and surrounds:

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



Source: Marine Traffic. Updated 04/10/2024 at 14:00.

### iii. Durban

On Friday, Pier 1 recorded two vessels on berth, operated by five gangs, with two at anchor. Stack occupancy was **30% for GP containers** and remained undisclosed for reefers as the end of the reefer season is fast approaching. Between Monday and Thursday, the terminal executed more than 5 200 gate moves on the landside, with an average staging time of **~77 minutes (↑57%)**. Additionally, the terminal moved approximately 3 904 TEUs across the quay on the waterside during the same period. The terminal had **five STS cranes** and **14 RTGs** in service towards the end of the week.

Pier 2 had four vessels on berth and five at anchorage on Thursday, as adverse weather and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **60% for GP containers** and remained **undisclosed** for reefers as the reefer season is coming to a close. The terminal operated with 11 gangs and moved approximately 12 103 containers across the quay between Monday and Thursday on the waterside. During the same period, there were approximately 8 428 gate moves on the landside, with an average **TTT of 83 minutes (↓17%, w/w)** and a **staging time of ~116 minutes (↓3%)** throughout the week. Additionally, approximately 1 420 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **53** and **58** out of a fleet complement of 84 this week. Thus, the availability figure sat roughly at **65%** during this period. The Terminal has been working to enhance the availability and reliability of straddle carriers, targeting 55 units in late September. Pier 2 has procured 20 new straddle carriers, with the first batch of four arriving in December 2024 and the rest delivered by May 2025.

Durban's MPT terminal recorded three vessels at berth on Thursday and two at outer anchorage. Stack occupancy for containers was 74%, with the breakbulk stack at 68%. In the preceding 24 hours, the terminal

managed to handle 679 containers and 1 880 tons of breakbulk on the waterside. On the landside, 246 container trucks and 35 breakbulk RMTs were serviced. During this period, two cranes, ten reach stackers, ten forklifts, and 16 ERFs were in operation. The latest reports suggest that the tests performed on Crane 1 this week were unsuccessful, and as a result, the ETR of the machine has been revised to Saturday afternoon. The fourth crane is still on course to return to service towards the end of January.

On Thursday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with none at anchorage. In the prior 24 hours, the terminal handled 1 025 road and 225 rail units on the landside while handling no volumes on the waterside. The main reason is that the berthed vessel only berthed early on Thursday morning. Overall stack occupancy was 64% (Exports: 67%, Imports: 29%, Transshipments: 3%), 5% at Q&R, and 5% at G-berth. During this period, the terminal had 123 high-and-heavy (abnormal loads) on hand and managed to handle four.

Some good news emanating from Durban: the first of the five new tugs, the “Vhutshilo,” commenced daytime operations during week 40. Two of the remaining vessels planned to begin operations between weeks 41 and 43. The final two will be operational in November.

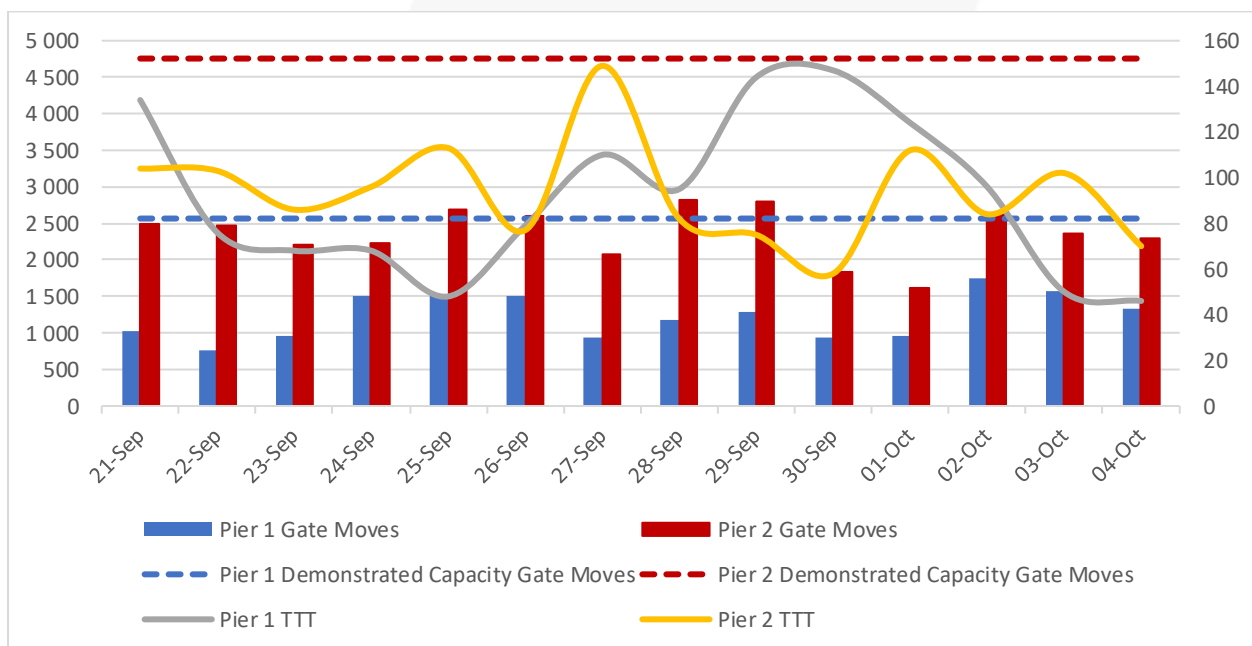
As of 09.00 am on 7 October, Pier 1 at DCT reported that the COSATU stay away has had no impact on attendance. The facility is fully staffed, and operations are proceeding as expected. DCT Pier 2 reports some stay away, with around 85% of resources available.

Transnet Freight Rail indicated that operational capacity on the ConCor (NATCOR) line continues with five trains daily to and from City Deep and one to PRETCON. Train transits between Durban and City Deep have improved from 69 hours (23/24) to 50 (24/25 Q1) and 39 hours in recent weeks.

11 trains are now available for short-haul operations from the container terminal to back-of-port operations, which should relieve some pressure on DCT.

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.

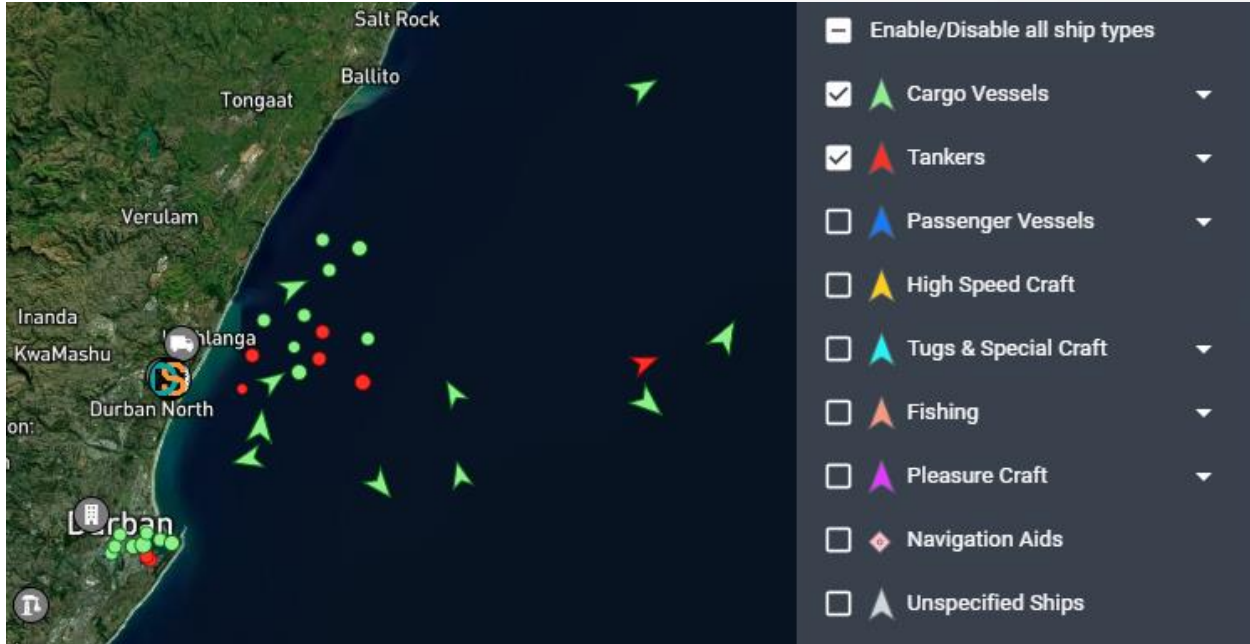
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 04/10/2024.

A queue of container vessels waiting outside Durban has built up and remains. At midday on Friday, **five** vessels were waiting for Pier 2, **two** for Pier 1, and **three** for Point terminal, with a current estimation of **at least seven additional days added to the schedules** (similar to last week). The following is a snapshot of the port and vessels waiting to berth:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 04/10/2024 at 14:00.

#### iv. Richards Bay

On Thursday, Richards Bay recorded ten vessels at anchor and 15 on the berth. Two tugs and one helicopter operated for marine resources in the 24 hours before, as the pilot boat remained out of commission this week and is only anticipated to return around 07 October. During the same period, the coal terminal had zero vessels at berth and zero at anchor while handling 226 952 tons on the waterside. The average for the week was around **177 443 tons (↑57%, w/w)**. On the landside, 21 trains were serviced, against the target of 22.

#### v. Eastern Cape ports

On Wednesday, NCT recorded two vessels on berth and none at anchor, with six vessels drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before Thursday. Stack occupancy figures were recorded at **37% for reefers, 58% for reefer ground slots, and 32% for the general stack**. Despite conceding around 50 operational hours to adverse weather this week, the terminal handled more than 876 TEUs on the waterside. On the landside, approximately 144 trucks were processed at an average TTT of **~34 minutes** during the same period.

On Wednesday, GCT recorded zero vessels at berth and two 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 Thursday. Despite being windbound for around eight hours during this period, 389 TEUs were handled across the quay on the waterside, while 323 trucks were processed at a TTT time of **~28 minutes**. Stack occupancy figures were recorded at **43% for reefers, 52% for reefer ground slots and 55% for the general stack**.

**vi. Saldanha Bay**

On Thursday, the Iron-ore terminal had zero vessels at anchorage and two on the berth, while the multi-purpose terminal had one vessel at anchor and three at berth.

**vii. Mossel Bay**

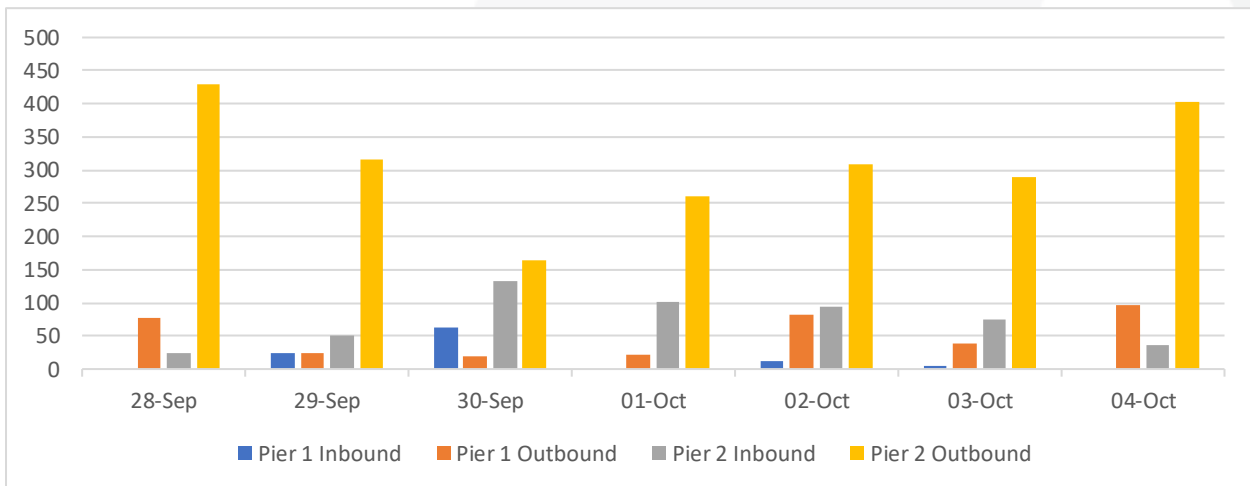
Earlier this week, TNPA initiated a Request for Information (RFI) process for a Multi-Purpose Terminal (MPT) at the Port of Mossel Bay’s Quay 4 precinct. The RFI calls on interested parties to submit proposals to design, develop, finance, maintain and operate a Multi-Purpose Terminal at Quay 4, where breakbulk and oil and gas cargo are currently handled. RFI documents can be accessed from the National Treasury’s e-tender publication portal, [www.etender.gov.za](http://www.etender.gov.za), or the Transnet website: [www.transnet.net](http://www.transnet.net). Responses to the RFI must be submitted by 29 November 2024 at 16:00.

**viii. Transnet Freight Rail (TFR)**

No significant incidents were reported on the ConCor this week; however, towards the end of the week, DCT Pier 2 had 91 ConCor units on hand with a dwell time of 120 hours and 63 over-border units with a dwell time of 26 days. Rail containers in Durban were reported as Point: 0, Pier 2: 150. This week, TFR informed customers of the ConCor about operational disruptions due to a derailment following maintenance, adverse weather conditions, Eskom power outages, and increased theft and vandalism. Efforts are being made to rebalance the system, and customers will be updated on their consignments by their Customer Services Manager.

The following figures show the number of containers handled on the Container Corridor this week:

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



Source: Calculated using data from Transnet, 2024. Updated 04/10/2024.

In the last week (28 September to 4 October), rail cargo handled out of Durban was reported at **3 147** containers, up by **↑12%** from the previous week’s **2 812** containers.

**ix. Planned COSATU and FEDUSA National Strike – Impact on Port Operations**

The latest reports indicate that COSATU and FEDUSA have informed NEDLAC of their planned national strike on Monday, 7 October 2024, which may impact port operations across South Africa. The strike is part of ongoing efforts to present a memorandum of demands to the Department of Labour, including opposition to government privatisation strategies and austerity measures such as budget cuts. The strike aims to address significant labour concerns, with unions estimating that **11,3 million jobs** nationwide are at stake.

Transnet Port Terminals (TPT) has responded by implementing a comprehensive Business Continuity Plan, ensuring all terminals remain open and fully operational on Monday. Each terminal will have a command centre to monitor and mitigate potential impacts. Employees participating in the strike will be subject to a "no work, no pay" policy. While the risk of significant operational disruptions is assessed as low, TPT will keep stakeholders informed through regular daily updates.

The planned strike follows a week of notable global labour unrest, particularly in the United States, where the International Longshoremen's Association (ILA) strike has severely disrupted operations. These actions underscore the damaging economic impact of such strikes, as labour disputes in critical industries like ports have ripple effects across supply chains, further straining an already challenged global economy.

## 2. Air Update

### a. International air cargo

The following table shows the inbound and outbound air cargo flows to and from ORTIA for the week beginning 23 September. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *September 2023* averaged ~**783 212 kg** per day.

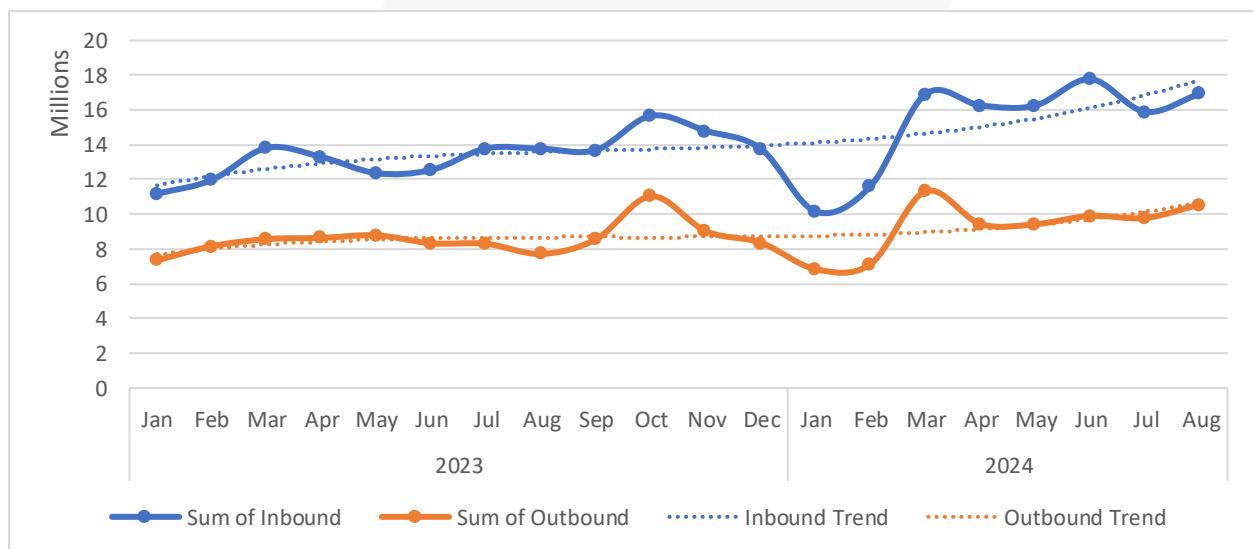
Table 4 – International inbound and outbound cargo from OR Tambo

| Flows           | 23-Sep  | 24-Sep  | 25-Sep  | 26-Sep  | 27-Sep  | 28-Sep  | 29-Sep    | Week             |
|-----------------|---------|---------|---------|---------|---------|---------|-----------|------------------|
| Volume inbound  | 416 976 | 239 270 | 405 620 | 201 551 | 502 010 | 251 795 | 2 123 730 | <b>4 140 952</b> |
| Volume outbound | 271 004 | 220 448 | 256 998 | 240 128 | 286 417 | 228 312 | 1 666 408 | <b>3 169 715</b> |
| Total           | 687 980 | 459 718 | 662 618 | 441 679 | 788 427 | 480 107 | 3 790 138 | <b>7 310 667</b> |

Courtesy of ACOC. Updated: 01/10/2024.

The daily average of air cargo handled at ORTIA in the previous week amounted to **591 565 kg** inbound (↑5%, w/w) and **452 816 kg** outbound (↑3%), resulting in an average of **1 044 381 kg**. This week's increase again sees the average cargo breaching a ton a day, with comparative figures significantly up versus prior years, as the industry is around ↑33% versus September 2023 and still up again versus pre-pandemic levels (↑16% versus September 2019):

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



Courtesy of ACOC. Updated: 01/10/2024.

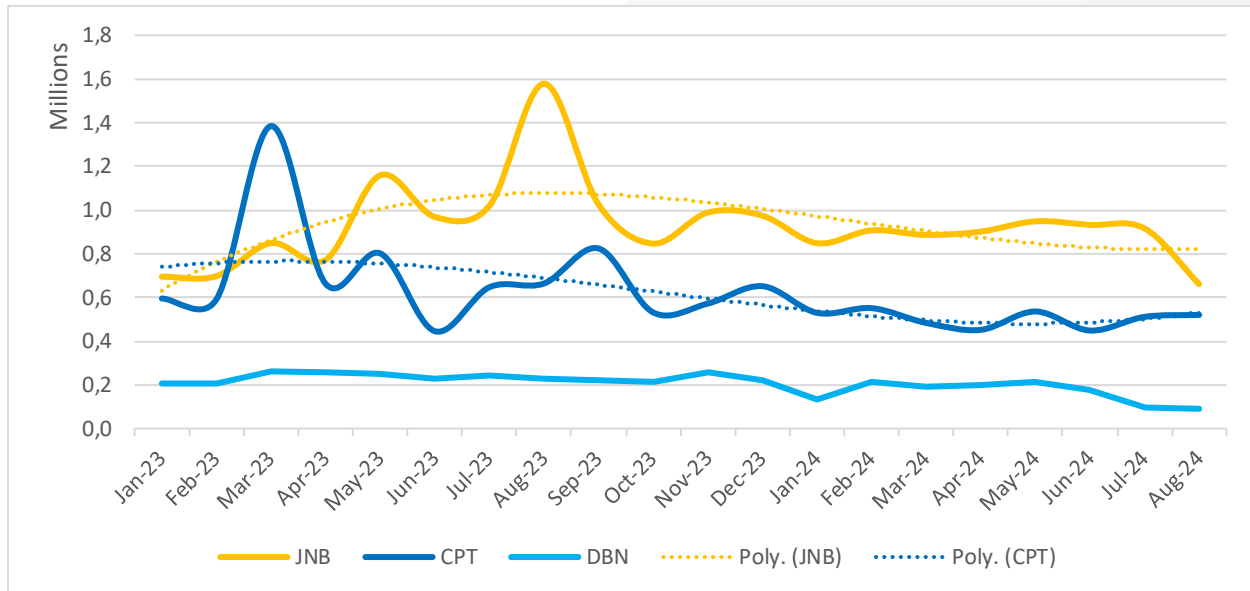
## b. Domestic air cargo

Consolidated domestic air freight volumes for our three primary airports are collectively down versus the same time last month ( $\downarrow 17\%$ , m/m) and last year ( $\downarrow 49\%$ , y/y). Individually, the following movements have been observed for August:

- Johannesburg cargo decreased monthly by  $\downarrow 28\%$  (m/m) and annually by a massive  $\downarrow 58\%$  (y/y).
- Cape Town cargo increased monthly by  $\uparrow 2\%$  (m/m) but decreased and annually by  $\downarrow 28\%$  (y/y).
- Durban cargo decreased monthly by  $\downarrow 8\%$  (m/m) and annually by a significant  $\downarrow 60\%$  (y/y).

The following figure shows the movement since 2023, with August numbers recording some of the lowest levels since then:

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 01/10/2024.

## 3. SARS Merchandise Trade Statistics: August

SARS released its latest "Merchandise Trade Statistics" for August<sup>8</sup>, with the headline showing a preliminary monthly trade surplus of **R5,6 billion**. Monthly trade shows that exports decreased by  $\downarrow 5,0\%$  from July (m/m), while imports increased by  $\uparrow 1,8\%$  (m/m). The YTD figures show a trade surplus of **R89,0 billion**, doubling from the **R44,8 billion** trade surplus recorded in 2023. Annually, export flows for August 2024 were **R165,6 billion** and  $\downarrow 8,2\%$  (y/y) lower compared to August 2023, while import flows were  $\downarrow 3,1\%$  lower compared to 2023, having decreased from **R165,1 billion** to **R159,9 billion** in the current period.

Regionally, trade with BELN countries for August resulted in a trade surplus of **R13,3 billion** – from exports of **R19,2 billion** and imports of **R5,9 billion**. Exports to our neighbouring countries increased by  $\uparrow 10,8\%$  (m/m) between July and August, with imports slightly decreasing by  $\downarrow 0,9\%$  (m/m) over the same period. The cumulative figures for the year point to a substantial positive trade balance with BELN countries, similar to last year – from **R81,5 billion** in 2023 to **R89,7 billion** in trade balance surplus for 2024.

<sup>8</sup> SARS. 30/09/2024. [Trade Statistics: August 2024](#).

## 4. Road and Regional Update

### a. Cross-border and road freight delays

This week, the following points should be noted regarding challenges and delays on roads in South Africa and the surrounding SADC region.

- The median border crossing times at South African borders decreased by nearly **five hours**, averaging **10,0 hrs (↓32%, w/w)** for the week.
- In contrast, the greater SADC region (excluding South African controlled) decreased by around **two hours** and averaged **~2,9 hrs (↓41%, w/w)**.
- **Beitbridge operations:**
  - Complaints have increased about drivers being made to wait for over a day due to delays in verifying vehicle contents.
  - Additionally, operations are ending at 8 PM, despite being advertised as 24-hour. However, it's important to note that while the border itself is operational around the clock, customs agents do not work 24/7.
- **Zimbabwe transit fuel duties:**
  - Duties on transit fuels have been reinstated, now covering all three major National Oil Infrastructure Company of Zimbabwe (NOIC) depots after initial rejection.
- **Skilpadshek border post delays:**
  - Queues extended to 13 km on Thursday last week.
- **DRC Customs:**
  - Temporary suspension of access to customs servers from 10 PM on 4 October to 6 October.
  - Operators have been requested to make arrangements in advance.
- **FESARTA partners with North Star Alliance:**
  - FESARTA has partnered with North Star Alliance to offer members medical, breakdown, police, financial, accommodation, and network services in Zimbabwe, Zambia, Mozambique, South Africa, Tanzania, Kenya, and Uganda.
  - North Star Alliance is a pioneer in last-mile health for mobile populations and the communities they interact with.<sup>9</sup>

The following table shows the changes in bidirectional flows through South African borders, with the subsequent table showing the consolidated corridor movements:

Table 5 – Delays<sup>10</sup> summary – South African borders (both directions)

| Border Post  | Direction   | HGV <sup>11</sup> 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 | 427                                | 0,6                | 6,3                           | 23,5                         | 12 810                   | 2 989               |
| Beitbridge   | Zimbabwe-SA | 405                                | 6,3                | 2,4                           | 15,4                         | 12 150                   | 2 835               |
| Groblersbrug | SA-Botswana | 233                                | 0,4                | 1,5                           | 27,0                         | 6 990                    | 1 631               |

<sup>9</sup> [North Star Alliance](#).

<sup>10</sup> It should be noted that the root cause of the reported delays is uncertain and variable at this point. Moreover, the delays may be multiple and widely distributed. Therefore, they cannot be exclusively attributed to a specific common cross-border problem since we do not have a transparent view of the entire border process in granular detail. The causes of these bottlenecks typically include poor infrastructure, road congestion, and a lack of coordination between neighbouring countries and Customs (or OGA) stops, among other trade obstacles—data provided by the LMS (Logistics Monitoring System), which Crickmay produces in collaboration with SAAFF. Transporters, traders, and cargo owners are encouraged to use the non-tariff barrier (NTB) [online tool](#) UNCTAD and the AfCFTA Secretariat developed. However, given that platform's questionable effectiveness, transporters are encouraged to contact FESARTA and join their TRANSIST Bureau, arguably providing better and more reliable information.

<sup>11</sup> Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

| Border Post        | Direction     | HGV <sup>11</sup> Arrivals per day | Queue Time (hours) | Border Time – Best 5% (hours) | Border Time – Median (hours) | Est. HGV Tonnage per day | Weekly HGV Arrivals |
|--------------------|---------------|------------------------------------|--------------------|-------------------------------|------------------------------|--------------------------|---------------------|
| Martins Drift      | Botswana-SA   | 200                                | 1,4                | 0,4                           | 2,1                          | 6 000                    | 1 400               |
| Kopfontein         | SA-Botswana   | 242                                | 0,1                | 1,5                           | 14,6                         | 7 260                    | 1 694               |
| Tlokweng           | Botswana-SA   | 21                                 | 2,0                | 0,2                           | 0,4                          | 630                      | 147                 |
| Vioolsdrift        | SA-Namibia    | 30                                 | 1,3                | 1,3                           | 3,3                          | 900                      | 210                 |
| Noordoewer         | Namibia-SA    | 20                                 | 0,2                | 0,3                           | 11,2                         | 600                      | 140                 |
| Nakop              | SA-Namibia    | 30                                 | 3,1                | 1,2                           | 3,1                          | 900                      | 210                 |
| Ariamsvlei         | Namibia-SA    | 20                                 | 0,2                | 0,4                           | 1,2                          | 600                      | 140                 |
| Skilpadshek        | SA-Botswana   | 259                                | 1,4                | 1,6                           | 14,5                         | 7 770                    | 1 813               |
| Pioneer Gate       | Botswana-SA   | 74                                 | 0,6                | 0,0                           | 0,0                          | 2 220                    | 518                 |
| Lebombo            | SA-Mozambique | 1 446                              | 4,3                | 1,2                           | 5,3                          | 43 380                   | 10 122              |
| Ressano Garcia     | Mozambique-SA | 125                                | 4,3                | 0,3                           | 2,1                          | 3 750                    | 875                 |
| <b>Sum/Average</b> |               | <b>3 532</b>                       | <b>1,9</b>         | <b>1,3</b>                    | <b>8,8</b>                   | <b>105 960</b>           | <b>24 724</b>       |

Source: TLC, FESARTA, & Crickmay, week ending 29/09/2024.

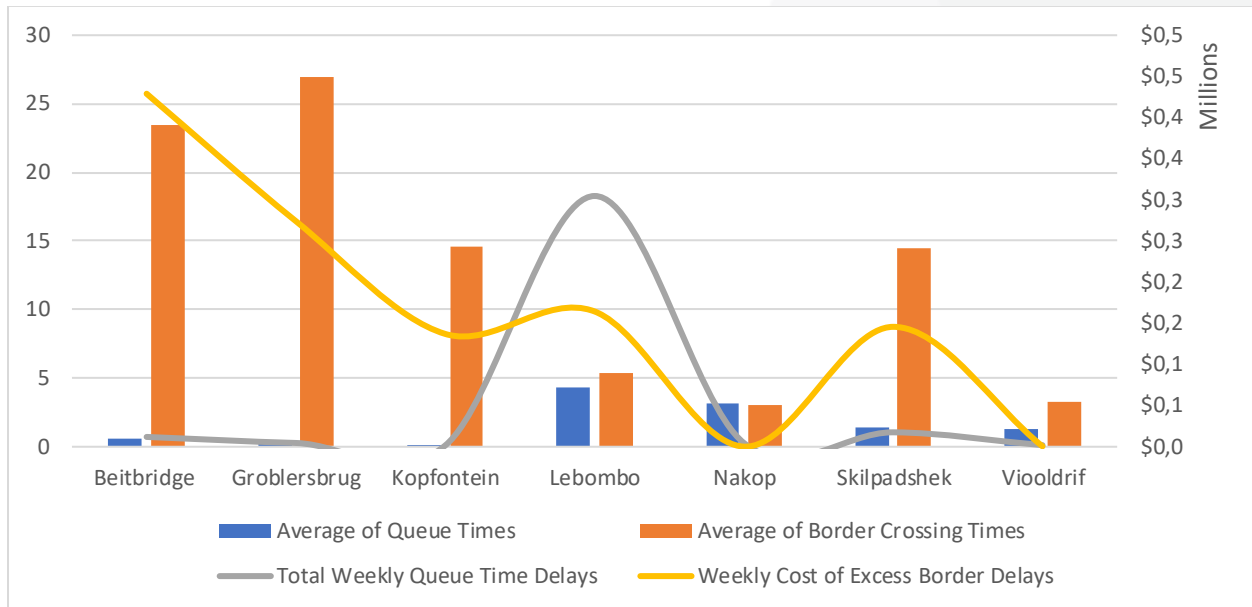
Table 6 – Delays summary – Corridor perspective

| 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                  | 9,8        | 2,1                   | 13,8                 | 9 600                    | 2 240               |
| Central Corridor        | 798                  | 0,0        | 0,4                   | 4,1                  | 23 940                   | 5 586               |
| Dar Es Salaam Corridor  | 1 819                | 44,6       | 1,1                   | 14,0                 | 54 570                   | 12 733              |
| Maputo Corridor         | 1 571                | 4,3        | 0,7                   | 3,7                  | 47 130                   | 10 997              |
| Nacala Corridor         | 127                  | 0,0        | 0,0                   | 0,0                  | 3 810                    | 889                 |
| North/South Corridor    | 3 600                | 15,8       | 2,1                   | 12,5                 | 108 000                  | 25 200              |
| Northern Corridor       | 2 817                | 0,0        | 0,1                   | 1,5                  | 92 520                   | 21 588              |
| Trans Caprivi Corridor  | 116                  | 0,0        | 0,0                   | 0,0                  | 3 480                    | 812                 |
| Trans Cunene Corridor   | 100                  | 0,0        | 0,0                   | 0,0                  | 3 000                    | 700                 |
| Trans Kalahari Corridor | 363                  | 1,2        | 0,6                   | 4,6                  | 10 890                   | 2 541               |
| Trans Oranje Corridor   | 100                  | 1,2        | 0,8                   | 4,7                  | 3 000                    | 700                 |
| <b>Sum/Average</b>      | <b>11 731</b>        | <b>8,7</b> | <b>0,9</b>            | <b>6,5</b>           | <b>359 940</b>           | <b>83 986</b>       |

Source: TLC, FESARTA, & Crickmay, week ending 29/09/2024.

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

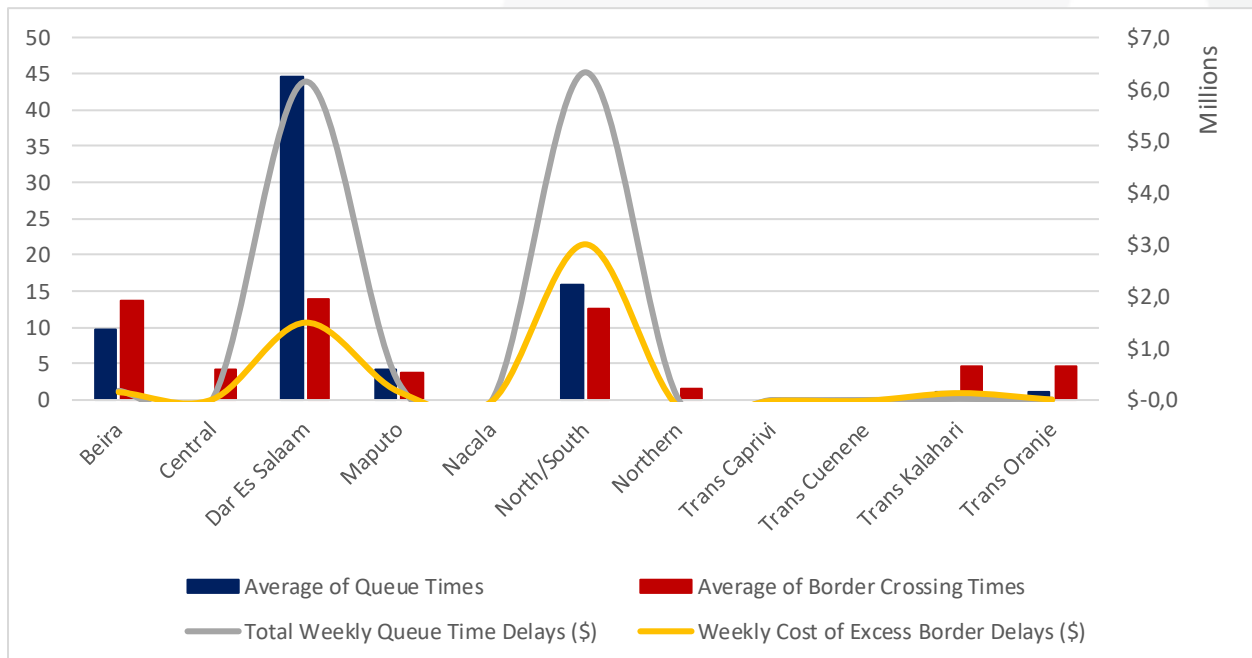
Figure 12 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 29/09/2024.

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

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



Source: TLC, FESARTA, & Crickmay, week ending 29/09/2024.

In summary, cross-border queue time averaged **~8,7 hours** (down by **~0,1 hours** from the previous week's **~8,7 hours**), indirectly costing the transport industry an estimated **\$13,0 million (R228 million)**. Furthermore, the week's average cross-border transit times hovered around **~6,5 hours** (up by **~0,6 hours** from the **~5,9 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$4,8 million (R84 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$17,8 million (R311 million, up by ~R10 million or ↑3,6% from ~R301 million in the previous report)**.

## 5. International Update

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

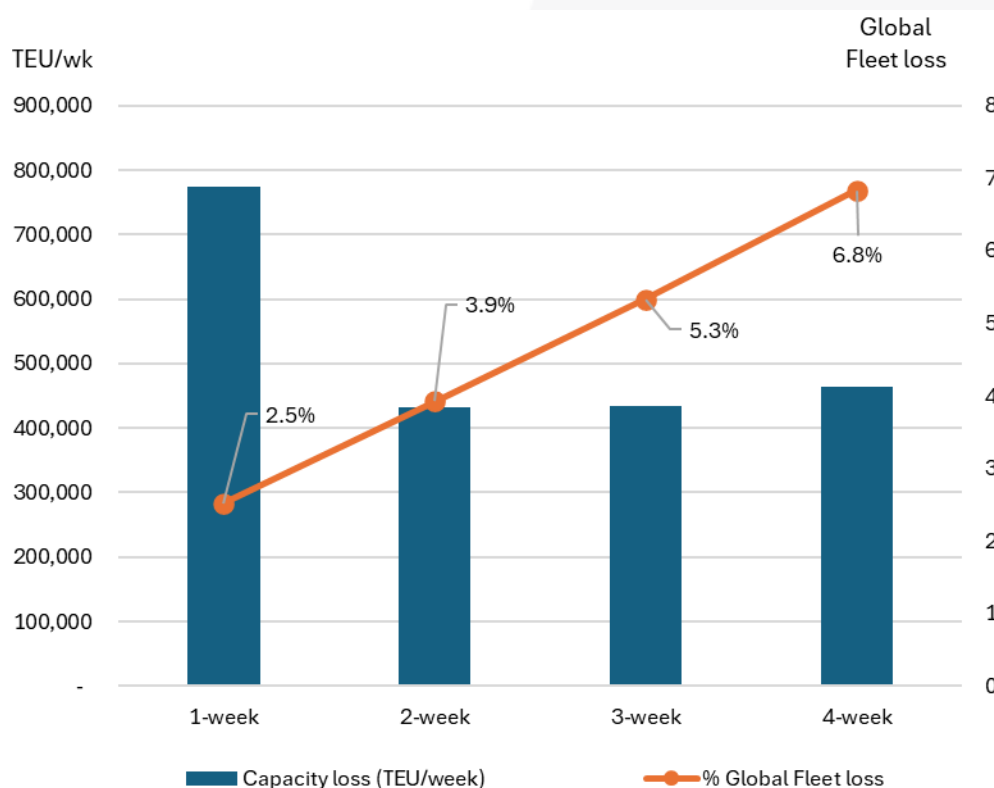
### a. Global shipping industry

#### i. ILA strike on the US East Coast

The International Longshoremen's Association (ILA) strike, which began on October 1, 2024, at the US East Coast and Gulf ports, has caused significant disruption across the global container shipping industry. This industrial action, the first on the East Coast since 1977, was triggered after last-minute negotiations failed between the ILA and the United States Maritime Alliance (USMX). The union members rejected a final wage offer from employers, citing it as inadequate. As a result, the strike closed major container terminals and halted auto-shipments, creating widespread economic concerns. The strike has already seen 90 ships impacted by the disruption, and they are scheduled to call at the East Coast ports.

The strike has severe implications for global shipping schedules and capacity. The delay of vessels on the US East Coast is expected to result in a significant capacity loss, initially estimated at around **774 865 TEU** or **2,5% of the global container fleet** during the first week alone:

Figure 14 – Weekly capacity lost (TEU/week) and cumulative share of global fleet capacity lost (%/week)

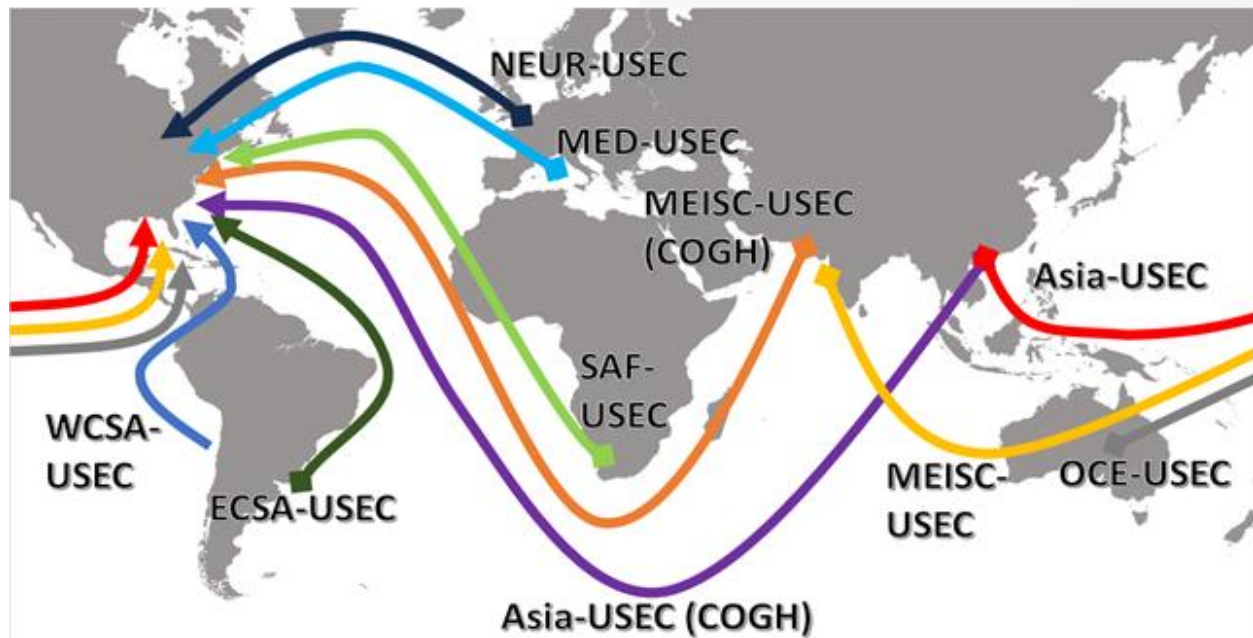


Source: [Sea Intelligence](#)

The longer the strike continues, the more significant the backlog of ships waiting to dock at the ports, with potentially ~7% of the global container fleet tied up if the strike lasts four weeks.<sup>12</sup> Shipping lines, which have been under pressure to adjust their operations, have begun implementing surcharges and port omissions to mitigate the impacts, although these efforts have been largely ad hoc.

The timing of the strike coincided with China's Golden Week holidays, adding further complexity to an already strained global logistics network. Freight rates, which had been depressed in recent months, are expected to rebound sharply, especially if the strike continues for over two weeks. This increase will not only affect the US-bound trade but will have broader repercussions across other major shipping routes due to the interconnected nature of global shipping.<sup>13</sup>

Figure 15 – The trades connected to the US East Coast



Source: [Sea Intelligence](https://www.seaintelligence.com)

In terms of operational impacts, more than **60 deep-sea services** from Asia, Europe, and South America are at risk, with many vessels forced to anchor outside East Coast ports or divert to other locations such as the West Coast or Canadian ports.<sup>14</sup> However, rerouting vessels to alternative destinations is impractical for most carriers. The US West Coast ports, which are already operating near capacity following the pandemic-era disruptions, cannot absorb the additional volumes, and the likelihood of a labour dispute at these ports adds further uncertainty. Similarly, Canadian ports lack the infrastructure to handle a significant portion of the US-bound cargo, and efforts to divert vessels there could exacerbate congestion and lead to extended delays.

The strike's impact is not limited to the maritime sector. It has also led to fears of broader economic fallout, particularly if it extends into the holiday season. Importers dependent on just-in-time inventory systems are

<sup>12</sup> Murphy, A. 02/10/2024. [Impact on Capacity due to Strike at USEC Ports.](#)

<sup>13</sup> Murphy, A. 02/10/2024. [Operational impact of USEC strike.](#)

<sup>14</sup> Van Marle, G. 03/10/2024. [Port strike will see 60 more ships at anchor this week and rates rising.](#)

already experiencing disruptions, and a prolonged strike could lead to product shortages, spoilage of perishable goods, and financial strain on businesses. The estimated daily economic cost of the strike ranges from **\$300 million to \$5 billion**, with some projections indicating that a strike lasting more than a month could push the US economy into a recession.

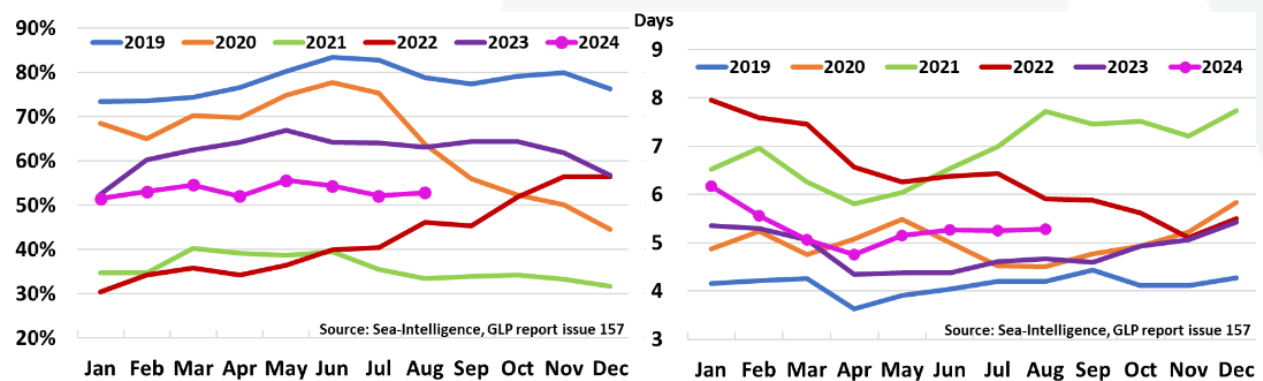
Politically, the strike comes at a sensitive time, just one month before the US presidential election, making government intervention unlikely. Although the US President has the authority to invoke the Taft-Hartley Act to halt the strike and impose an 80-day "cooling-off" period, it is considered politically risky for the administration to confront a major labour union. Furthermore, the ILA has threatened to retaliate through slowdowns if forced back to work, potentially prolonging the disruption without resolving the underlying issues.

Late in the week, there was a temporary resolution, with the ILA and USMX agreeing to suspend the strike for three days and extend their negotiations. This tentative agreement has led to the reopening of some ports, although it remains uncertain whether operations will fully resume over the weekend. The future of the dispute remains precarious, with both sides continuing to negotiate terms for a six-year contract extension.

**ii. Global schedule reliability**

According to *Sea Intelligence*, global schedule reliability improved by **↑0,7%** (m/m) to **52,8%** in August 2024, but it remains very low compared to recent years (except for the pandemic highs of 2021-2022).<sup>15</sup>

Figure 16 – Global Schedule Reliability (%) and Global Average Delays for Late Vessel Arrivals (days)



Source: [Sea Intelligence](http://Sea-Intelligence)

Consequently, schedule reliability remained consistent with the year's trends, ranging between **50%-55%** and **↓10,2%** lower year-on-year. The average delay for late vessel arrivals slightly increased (by **0,03 days**, m/m) to **5,28 days**, which is only surpassed by the pandemic highs of 2021-2022. On an annual basis, the August 2024 figure was **0,62 days** higher. Maersk was the most reliable carrier at **54,7%**, while PIL was the least reliable at **37,2%**. There were nine carriers with a monthly improvement in schedule reliability in August 2024. Year-on-year, only HMM and Yang Ming recorded an improvement of **↑4,4%** and **↑3,6%**, as there

<sup>15</sup> Murphy, A. 30/09/2024. [Global schedule reliability remains stable at 50%-55% in 2024](http://Global-schedule-reliability-remains-stable-at-50%-55%in-2024).

were six carriers with double-digit annual declines. Scheduling remains volatile, as Drewry's "Cancelled Sailings Tracker" registered a high **13% cancellation rate**.<sup>16</sup>

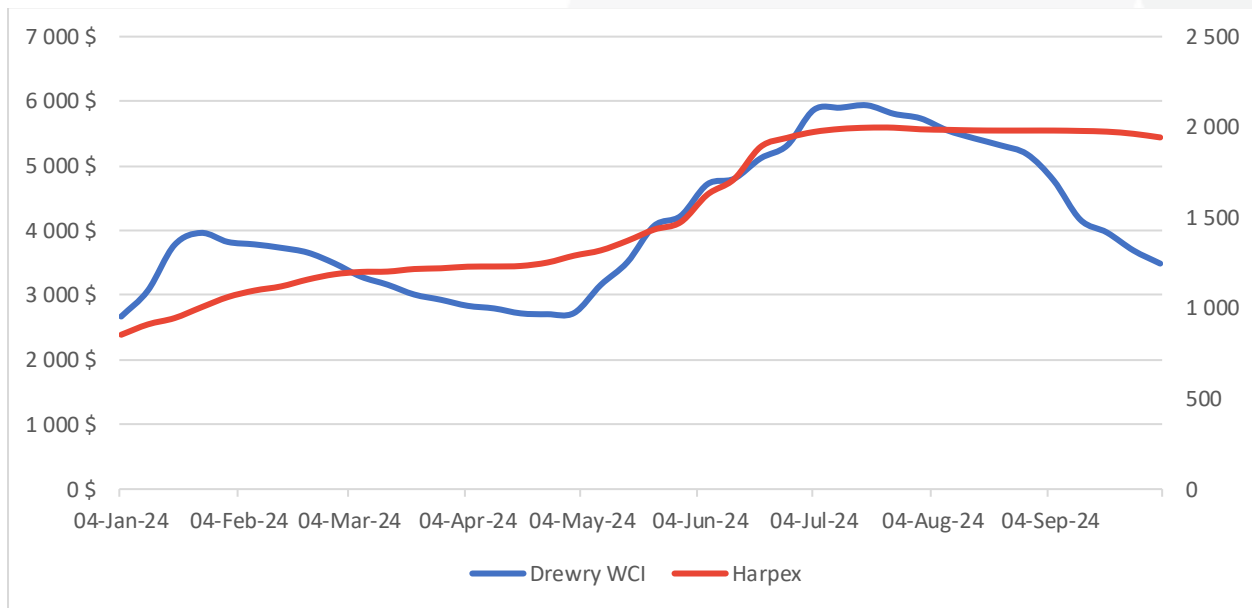
**iii. Container market summary**

Global congestion has slightly improved to around **2,8 million TEU, accounting for 9% of the global fleet; however, the aftermath of the US strike is set to impact global fluidity**.<sup>17</sup> In South Africa, port congestion at the Port of Durban improved slightly this week, as Durban recently registered decent throughput numbers. Some **19 500 TEU** is currently outside at anchorage. As such, the queue-to-berth ratio at Durban was **0,61**.<sup>18</sup>

**iv. Global container freight rates**

Drewry's "World Container Index" recorded another similar drop this week, as the composite index is down by **↓5,5% (or \$202)**, trading at **\$3 489 per 40-ft container**.<sup>19</sup> Compared to just two months ago, the average spot prices are now down by over **\$2 150**. Meanwhile, charter rates have finally started to follow suit, as the *Harper Petersen Index* (Harpex) traded around **1 943 points (↓1%, w/w)** on Friday. The following combined illustration shows their relationship since the start of the year:

Figure 17 – World Container Index and Charter rates (YTD, \$ per 40ft, index)



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

**v. Further developments of note**

Apart from the overview provided above, there were some additional noteworthy developments this week:

**1. Deutsche Bahn supervisory board approves DSV bid for DB Schenker:**

- a. Deutsche Bahn's supervisory board has approved the sale of DB Schenker to DSV, with the transaction expected to close next year pending regulatory approvals.<sup>20</sup>
- b. The sale, valued at up to €14.8 billion, will help Deutsche Bahn focus on restructuring its rail infrastructure and reducing debt while DB Schenker gains a new strategic owner.

<sup>16</sup> Drewry. 04/10/2024. [Cancelled Sailings Tracker](#).

<sup>17</sup> Linerlytica. 30/09/2024. [Market Pulse – Week 38](#).

<sup>18</sup> Linerlytica. 04/10/2024. [Port Congestion Watch](#).

<sup>19</sup> Drewry. 03/10/2024. [World Container Index](#).

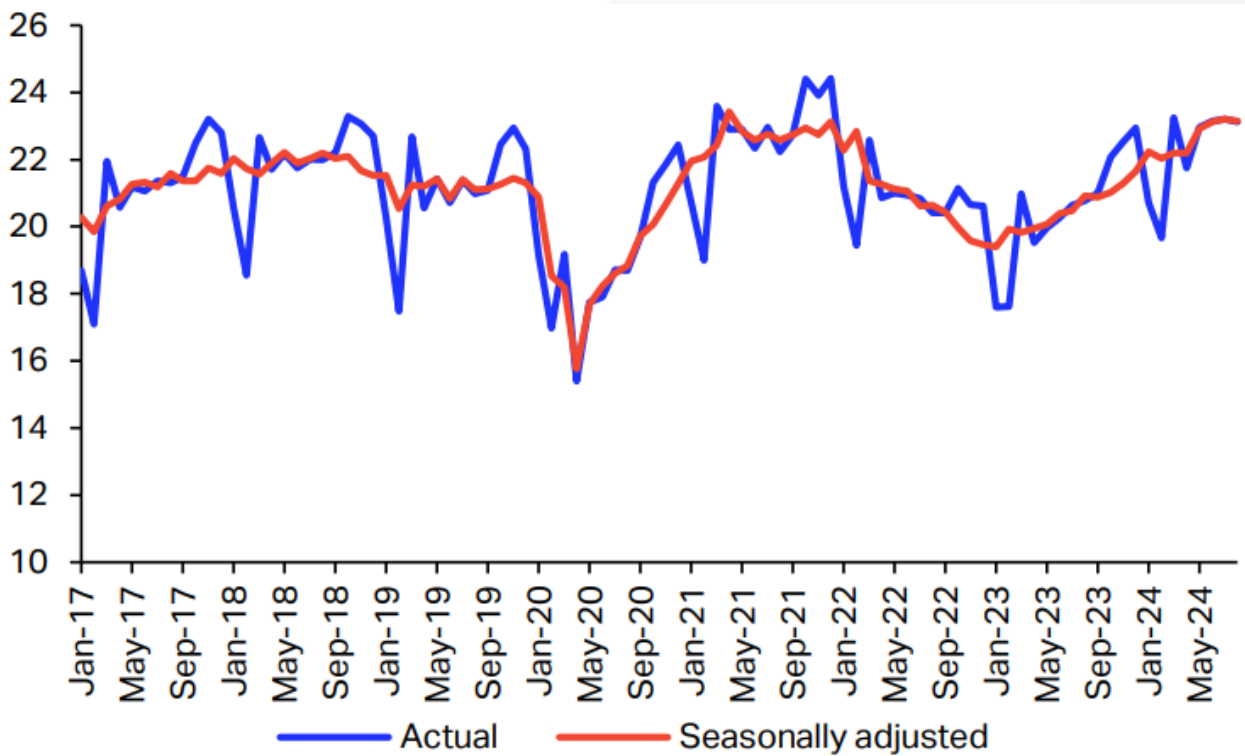
<sup>20</sup> Lennane, A. 02/10/2024. [Deutsche Bahn supervisory board approves DSV bid for DB Schenker](#).

- c. Although rival bidder CVC Capital Partners criticised the sales process, Deutsche Bahn maintains that it was transparent and DSV made the best economic offer.

**b. Global air cargo industry**

IATA released its latest “Air Cargo Market Analysis” for August, with a ninth consecutive double-digit increase for air cargo and the second straight month with record year-to-date demand levels.<sup>21</sup> Global cargo tonne-kilometres (CTK) increased by **↑11,4%** (y/y) in August, as international CTKs added **↑12,4%** (y/y) relative to last year, driven by growth in all regions and major trade lanes. Global air cargo capacity, measured in available cargo tonne-kilometres (ACTK), saw **↑6,2%** (y/y) growth in August, seeing slower growth than in the months prior but at the same time delivering record capacity levels. Despite global record capacity and falling fuel prices, the global air cargo yield maintains a moderate upward trend.

Figure 18 – Industry CTks (billions)



Source: [IATA](http://IATA)





















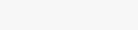
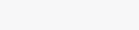
In August 2024, African carriers recorded a **↑7,5%** (y/y) increase in international CTks, reflecting the region's resilience in the global air cargo market despite broader challenges. Notably, trade lanes between Africa and Asia experienced a significant **↑21,1%** annual surge, partly driven by base effects from the previous year. This route has consistently seen double-digit growth since the second half of 2023, with e-commerce growth being a strong driver.

In the more frequent metrics, global air cargo tonnage rebounded by **↑2%** in week 39 of 2024 (23-29 September), after a **↓2%** contraction the previous week due to holidays in China, South Korea, and Chile. Worldwide tonnages were up **↑10%** (y/y), driven by recovery from the Asia Pacific (**↑6%**) and Central and

<sup>21</sup> IATA. 01/10/2024. [Air Cargo Market Analysis – August 2024](http://Air Cargo Market Analysis – August 2024).

South America (↑4%) regions. Notable increases were observed in cargoes from China, South Korea, and Taiwan to Europe. Tonnage flows from the Middle East and South Asia (MESA), and Bangladesh also saw growth, with Bangladesh to the USA rising ↑50% (y/y), despite political and logistical disruptions.

Figure 19 – Capacity, weight, and rates by region (last five weeks)

| Origin Regions<br>last 2 to 5 weeks | Capacity <sup>1</sup>   |            |            | Chargeable weight <sup>1</sup>  |            |            | Rate <sup>1</sup>   |            |             |
|-------------------------------------|---|------------|------------|---|------------|------------|---|------------|-------------|
|                                     | Last 5 wks  | 2Wo2W      | YoY        | Last 5 wks  | 2Wo2W      | YoY        | Last 5 wks  | 2Wo2W      | YoY         |
|                                     |  |            |            |   |            |            |   |            |             |
| Africa                              |  | +1%        | +4%        |  | +4%        | +14%       |  | +3%        | +1%         |
| Asia Pacific                        |  | +0%        | +6%        |  | -0%        | +9%        |  | +1%        | +18%        |
| C. & S. America                     |  | -0%        | +15%       |  | +1%        | +9%        |  | -1%        | -3%         |
| Europe                              |  | -1%        | +1%        |  | +4%        | +6%        |  | +1%        | -6%         |
| M. East & S. Asia                   |  | -1%        | +2%        |  | +1%        | +16%       |  | +3%        | +57%        |
| North America                       |  | +1%        | +2%        |  | +3%        | +5%        |  | +0%        | -5%         |
| <b>Worldwide</b>                    |  | <b>+0%</b> | <b>+3%</b> |  | <b>+2%</b> | <b>+9%</b> |  | <b>+1%</b> | <b>+12%</b> |

Source: [World ACD](#)

Average global rates increased by ↑1% (w/w) to **\$2,61 per kilogram**, with spot rates seeing a ↑4% (w/w) rise to **\$2,86/kg**. North America and Europe experienced the most significant week-on-week rate increases (↑6% and ↑5%, respectively). Asia Pacific and MESA rates rose annually by ↑26% and ↑86%, respectively. MESA region disruptions are caused by tensions in the Red Sea and elevated demand and rates. Meanwhile, Bangladesh faced additional instability, with European-bound tonnage dropping ↑15% (y/y), though USA-bound tonnage surged. Tonnage from MESA to the USA increased ↑13% in September, with significant rises from Colombo and Dubai. Overall, Asia Pacific and MESA have driven air cargo demand and rates, with further pressure anticipated in Q4 due to unresolved US port strikes and container shipping disruptions.

Lastly, due to escalating tensions in the Middle East, airlines are rerouting flights over Saudi Arabian and Egyptian airspace, resulting in delays of one to two hours. Several carriers, including Etihad, Emirates, Qatar Airways, and Flydubai, have cancelled or rerouted flights to Iraq, Iran, and Jordan, and these disruptions are expected to continue until the situation stabilises.<sup>22</sup>

ENDS<sup>23</sup>

<sup>22</sup> Goldstone, C. 02/10/2024. [Airlines scramble to avoid Middle East airspace as missiles fly.](#)

<sup>23</sup> **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 Forwards (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. This edition is proudly sponsored by [Turners Shipping](#).*

# FERI CERTIFICATES FOR IMPORTED AND TRANSITED GOODS TO OR THROUGH THE DRC



## Procedure

Turners Shipping has been designated as an official Freight Certification sub-Agent for the Democratic Republic of Congo (DRC), mandated to issue the FERI (Fiche Electronique de Renseignement à l'Importation) Certificates.

**1**

Submit the required documents by email or online.

**2**

Complete the application form and provide supporting documentation.

**3**

You will receive an invoice with attached draft, typically within 24 hours of all documents/information received.

**4**

When payment reflects, the draft approved and a copy of the final bill of lading received; the validation will be requested.

**5**

To avoid fines, the FERI must be validated before the vessel arrives at the destination.

## Introduction

The FERI Certificate is an essential requirement for all cargo entering the Democratic Republic of Congo (DRC). It is designed to streamline customs processes and ensure compliance with the DRC's import regulations.

Turners Shipping plays a pivotal role in facilitating smoother trade flows and enhancing the efficiency of cargo movement into one of Africa's most significant economies.

The FERI Certificate is an electronic document required to clear imported and transited goods to or through the DRC.

## Simpler, Safer, Faster

- We **reduce your administrative burden** by completing the application on your behalf.
- We abide by a strict **Non-Disclosure Agreement** and information shared with us will never be used for any other purpose.
- An impressive **24-hour turnaround** time.

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