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Cargo Movement Update #222[1]

Date: 23 February 2025

Weekly Snapshot

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

Flows	Current[2]			Previous[3]			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	36 960	42 108	**79 068**	34 122	38 874	**72 996**	↑8%
Air Cargo (tons)	3 679	2 482	**6 160**	3 953	2 342	**6 294**	↓2%

Monthly Snapshot

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

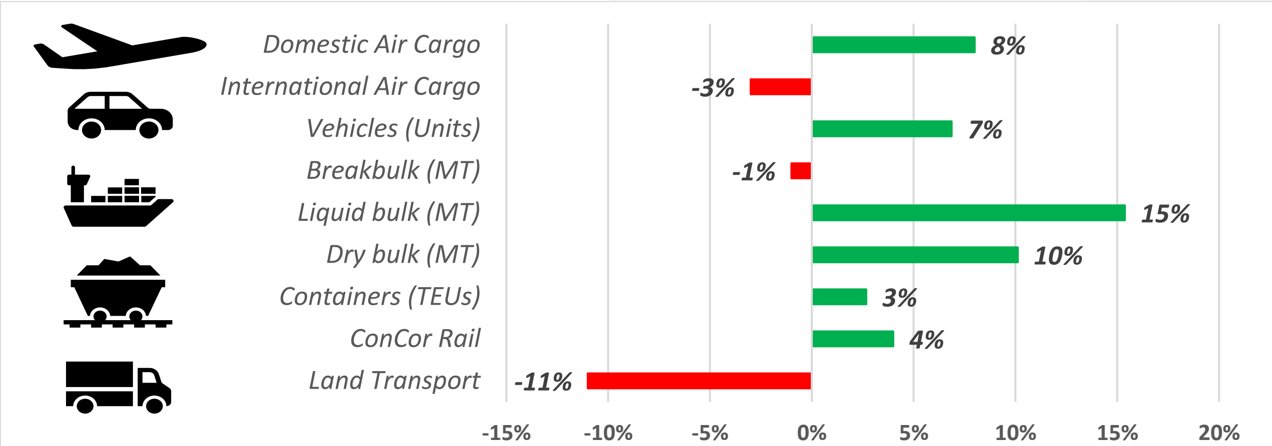
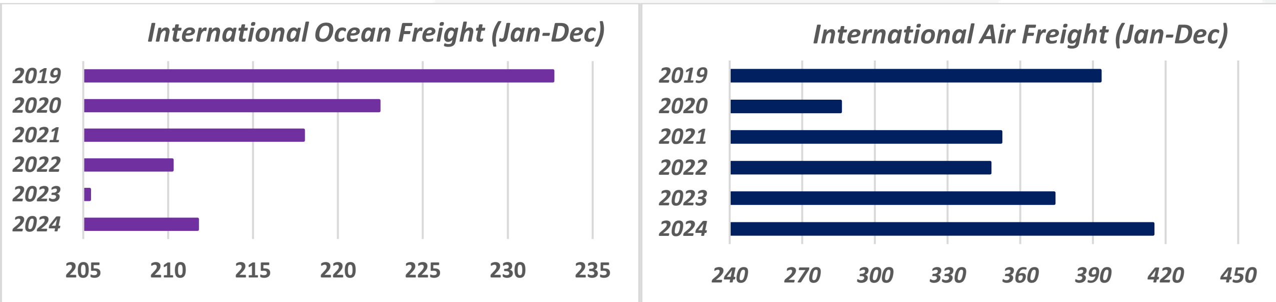


Figure 2 – Year-to-date flows 2019-2024[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~11 295 TEUs** was handled per day, with **~11 593 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 987** containers, up **↑7%** from last week.
- Truck volumes through Lebombo are steady at **1 358 HGVs/day**, with an average queue of **4,4 km**.
- Cross-border queue: **↑0,6 hrs**; transit: **↑0,5 hrs**; SA borders: **11,3 hrs** (**↑2%**); SADC: **5,0 hrs** (**↑11%**).
- Drewry's "*Container Port Throughput*" is at **113,7 points**, down by **↓2%** (m/m) but up by **↑5,4%** (y/y).
- Global container spot rates dropped by more than **$300** and are down by **↓9,7%** to **$2 795 /40-ft**.
- After a **↓13%** tonnage LNY-induced decline, air cargo volumes rebounded with two **↑3%** w/w increases.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *222nd* 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: Dec vs Dec.
[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. In our container terminals, an increased average of **11 295 TEUs** was handled per day, up from **10 428 TEUs** last week. Port operations were mainly constrained by adverse weather conditions, vacant berths, equipment breakdowns and – shortages. The Port of Cape Town conceded more than 40 operational hours this week to adverse weather, while the main operational constraints in Durban proved to be adverse weather and continuous equipment breakdowns. Inclement weather conditions mainly impacted operations at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. Last week, TNPA reported signing two terminal operator agreements to develop the country's first Liquefied Natural Gas (LNG) import terminal and a liquid bulk terminal at the Port of Richards Bay. Between Tuesday and Wednesday, the rail line between Durban and Maritzburg was closed due to a slack on the line. In addition, the latest reports from Maersk suggest that despite the return of the Cape Town southeasterly wind, the much-improved operational environment in South Africa continues.

South Africa has climbed to 23rd place in the Agility "*Emerging Markets Logistics*" Index, reflecting improvements in international logistics opportunities and digital transformation efforts. However, increasing transhipment volumes remains critical. Meanwhile, global supply chains are shifting, with **54%** of logistics professionals planning to reduce reliance on China by 2030. In shipping, Drewry's "*Global Container Port Throughput*" Index fell month-on-month but showed annual growth, while African ports recorded a modest increase. The US is proposing hefty levies on Chinese-built vessels, which could disrupt trade patterns. Container freight rates continue to drop, forcing carriers to offer discounts on long-term contracts, though capacity increases may limit rate hikes. Global port congestion remains stable, with around **8% of the fleet** delayed. While spot rates are falling, carriers attempt to maintain pricing discipline through contract negotiations. Further developments include **(1)** DSV's merger and acquisition strategy to continue and **(2)** a slow and tentative Suez Canal recovery.

In the air cargo space, the daily average of air cargo handled at ORTIA in the previous week amounted to **525 559 kg** inbound (**↓7%**, w/w) and **354 512 kg** outbound (**↑6%**). Cargo is still above the average levels of 2024 (**↑9%**, y/y) and also above the pre-pandemic levels of 2020 (**↑3%**). Worldwide air cargo tonnages have continued to recover slowly from what was a shallower Lunar New Year (LNY) dip than last year, although it's too soon to get much sense of how 'normal' or healthy demand this year will be. In other air cargo news, US CBP experiences a surge in parcels following the de minimis rule change, which will ultimately lead to more costs. Also, Schiphol Airport's substantial tariff increases could threaten air cargo operations in the long run.

Cargo flows across the Lebombo Border Post and N4 Corridor have again been consistent this week, with truck volumes steady compared to last week at **1 358 HGVs per day**. The average queue for the week was less than **3 km,** and an average border time of around **4,5 hours** per crossing. Rail to Maputo has increased **to six trains a day** on average in the last week. Sugar trains from Eswatini are constant at around **two trains daily**, although reporting has been inconsistent for rail.

For the rest of SADC borders, the average queue times increased by approximately **half an hour** from last week, as the transit times increased by the **same magnitude**. The median border crossing times at South African borders increased slightly – by around **10 minutes**, averaging **~11,3 hrs** (**↑2%**, w/w) for the week. In contrast, the greater SADC region (excluding South African controlled) increased by approximately **half an hour** from last week, averaging **~5,0 hrs** (**↑11%**). On average, the identical two SADC border posts last week took more than a day to cross: Beitbridge and Kasumbalesa (the worst affected, taking around **a day and a**

half to **two days,** depending on the direction). Other developments include **(1)** weather-induced border delays in South Africa and Botswana, **(2)** deteriorating Harare-Beitbridge road conditions, **(3)** new transport fees on Likasi Bypass, and **(4)** Katima Mulil weighbridge to operate 24/7.

The recent *Carte Blanche* exposé on equipment failures at the Port of Cape Town, while damning, underscored broader systemic issues affecting the entire industry. These challenges are real but not insurmountable. The priority now is to get back on track, accelerate investment, and restore efficiency in our ports. Encouragingly, Cape Town will receive nine new cranes in March—set to be operational between May and September—with a further batch arriving in July. Elsewhere, in Durban, four RTGs have been assembled at Pier 1, and four STS replacements are expected to be fully functional at Pier 2 by the end of the year (not to mention that four additional straddle carriers will arrive in March).

These long-overdue upgrades are critical to reversing the decline in port productivity and improving South Africa's global trade position. Our analysis of the continued reduction in transhipment cargo reinforces the picture of a decade-long decline, highlighting the urgent need for structural reform. However, while investigative reporting brings necessary scrutiny, sustained negative sentiment could further erode our reputational capital, potentially undermining investment efforts, exacerbating unemployment, and stalling economic recovery. The path forward must be one of transparency, data-driven decision-making, and collective action. Many stakeholders remain committed to fixing our logistics network—not through rhetoric but through tangible interventions that drive efficiency, competitiveness, and long-term sustainability. The stakes are high, but so is the resolve to turn the tide.

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 Mondays to Sundays.

Table 2 – Container Ports – Weekly flow reported for 17 to 23 February (measured in TEUs)

7-day flow reported (17/02/2025 – 23/02/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	3 796	26 573	**↓9%**
New Pier (Pier 1)	1 904	13 331	**↓16%**
Cape Town Container Terminal	1 749	12 244	**↑116%**
Ngqura Container Terminal	2 544	17 805	**↑42%**
Port Elizabeth Container Terminal	157	1 100	**↑186%**
Other	1 145	8 015	**↓15%**
Total	**11 295**	**79 068**	**↑8%**

Source: Calculated from TPT, 2025. Updated 23/02/2025.

An increased average of **~11 295 TEUs** (**↑8%**) was handled per day for the last week (*17 to 23 February, Table 2*), but it is still less than the projected average of **~12 123 TEUs** (**↓7%** actual versus projected).

For the coming week, a slightly increased average of **~11 593 TEUs** (**↑3%**) is predicted to be handled (*24 February to 2 March, Table 3*). Port operations were mainly constrained by adverse weather conditions, vacant berths, and equipment breakdowns and shortages.

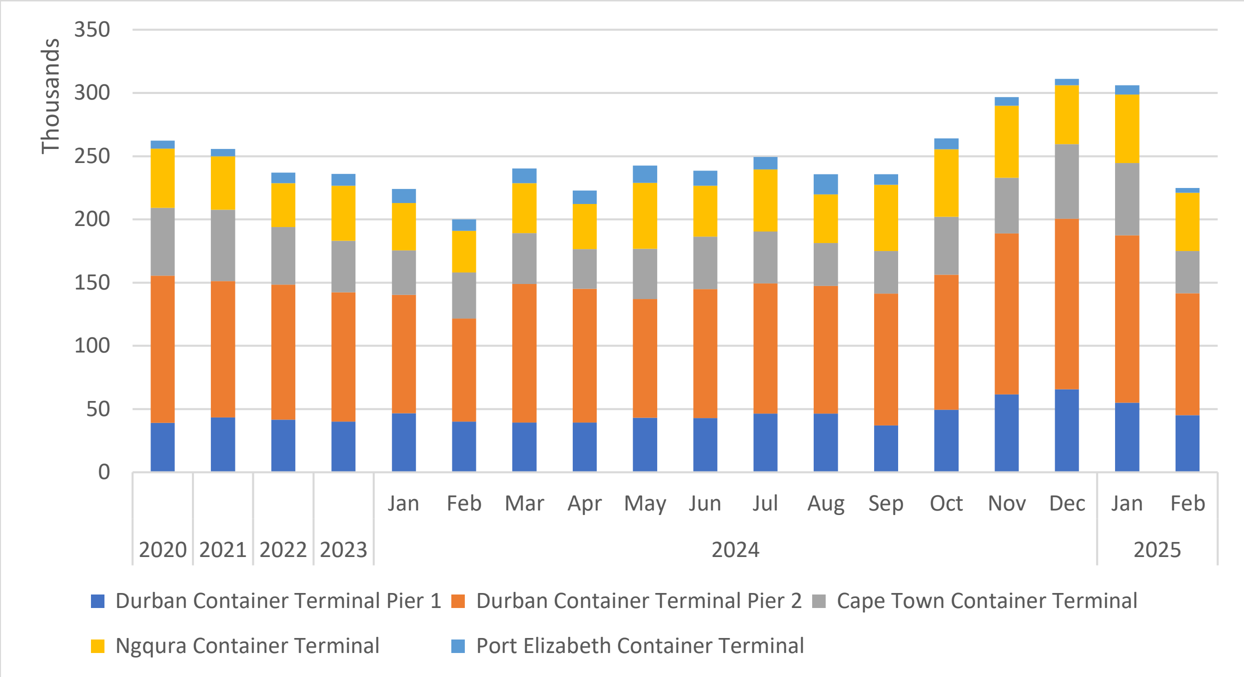
Table 3 – Container Ports – Weekly flow projected for 24 February to 2 March (measured in TEUs)

7-day flow reported (24/02/2025 – 02/03/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 612	32 287	**↑22%**
New Pier (Pier 1)	1 704	11 925	**↓11%**
Cape Town Container Terminal	2 098	14 685	**↑20%**
Ngqura Container Terminal	2 035	14 246	**↓20%**
Port Elizabeth Container Terminal	245	1 718	**↑56%**
Other	898	6 288	**↑92%**
Total	**11 593**	**81 149**	**↑3%**

Source: Calculated from TPT, 2025. Updated 23/02/2025.

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.

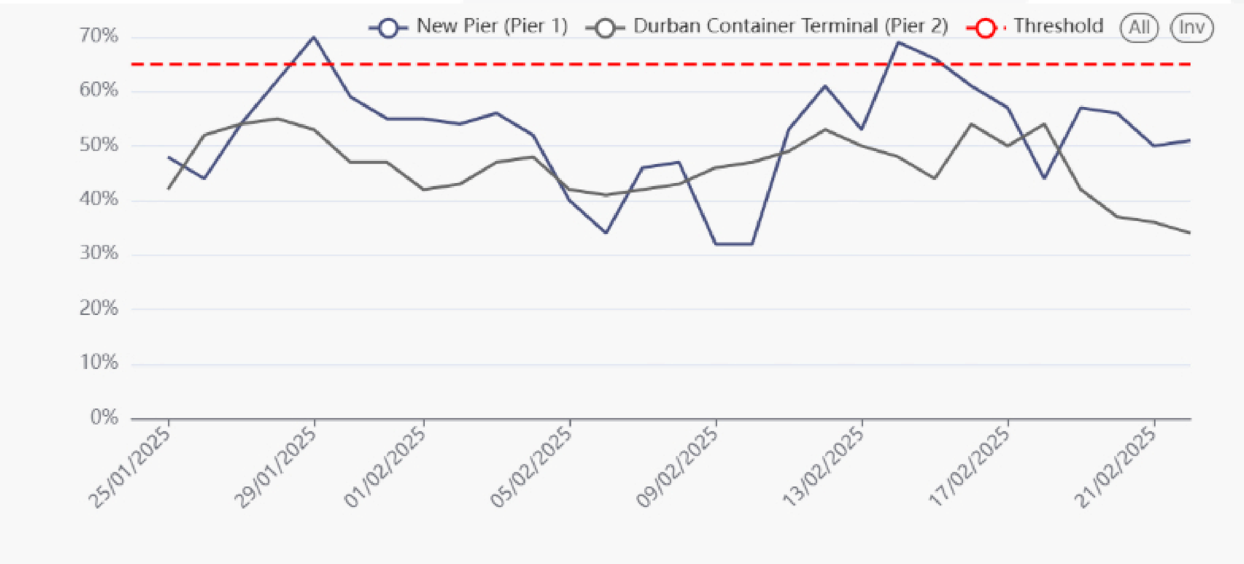
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 23/02/2025.

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

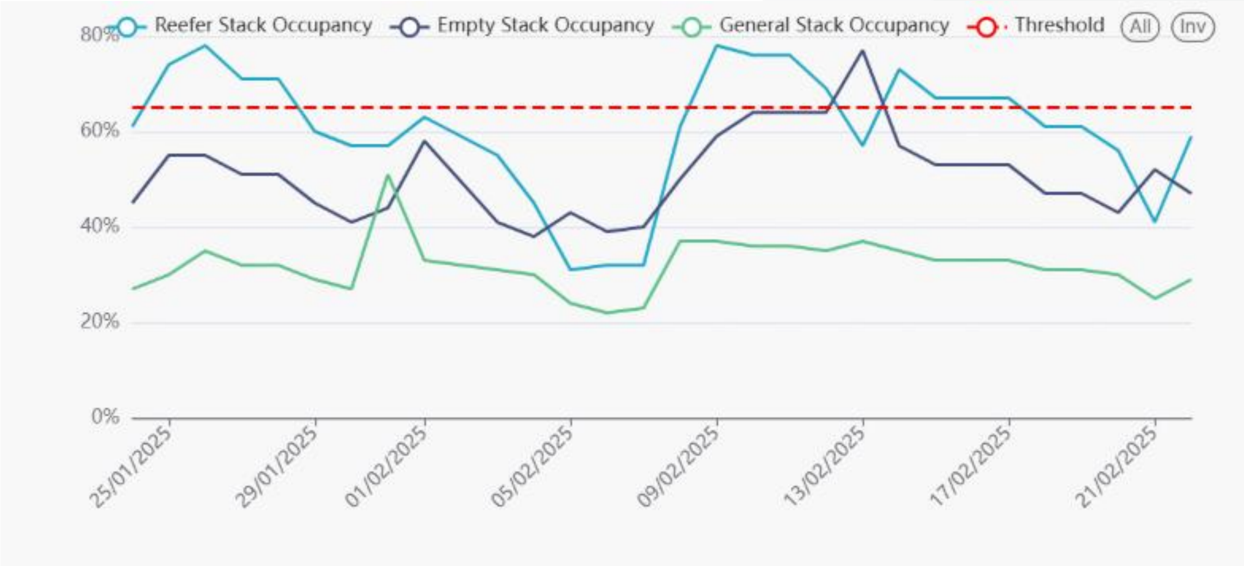
Figure 4 – Stack occupancy in DCT, general-purpose containers (25 January to present; a day on the day)



Source: Calculated using data from Transnet, 2025, and updated 23/02/2025.

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 (25 January to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 23/02/2025.

b. TNPA: January update

TNPA has released consolidated port statistics for January[6], with varying monthly performance but with subsectors seeing an increase on last year's levels. The following are key highlights:

- Containers increased monthly by **↑9%** (m/m) and annually by **↑3%** (y/y).
- Total bulk cargo decreased monthly by **↓1%** (m/m) but increased annually by **↑11%** (y/y).
- Vehicles decreased monthly by **↓25%** (m/m) but increased annually by **↑7%** (y/y).

The following table shows the respective changes versus December:

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

	Dec	Jan	Movement	%, m/m
Containers (TEUs)	**320 837**	**335 403**	**14 566**	**5%**
Landed	155 724	184 502	28 778	18%
Shipped	165 113	150 901	-14 212	-9%
Dry bulk (MT)	15 509 485	14 732 388	-777 097	-5%
Liquid bulk (MT)	2 852 975	3 446 354	593 379	21%
Breakbulk (MT)	520 537	535 458	14 921	3%
Vehicles (Units)	71 236	53 161	-18 075	-25%
Total cargo (excl. Vehicles)	**18 882 997**	**18 714 200**	**-168 797**	**-1%**

Source: TNPA, updated 19/02/2025.

Transnet Port Terminals handled **335 000 thousand containers** and **18,7 million metric tonnes** of bulk cargo during January. The following table shows the comparative overview for December versus last year, including the view versus the same month in the pre-pandemic year of 2019:

[6] Transnet. 2025. Port statistics.

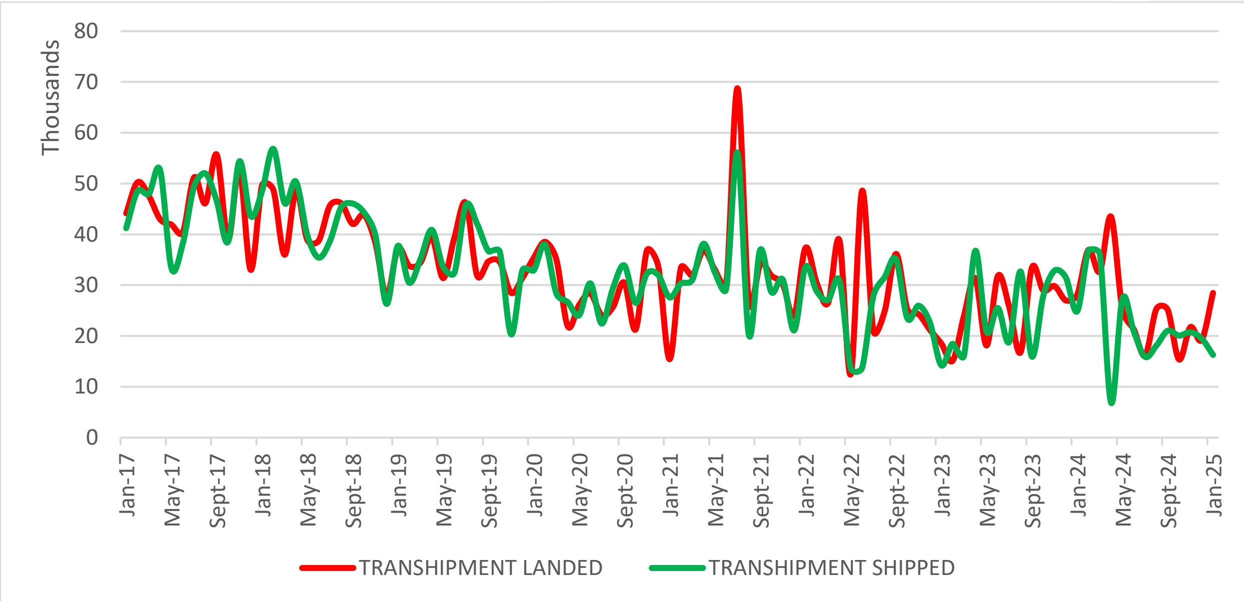
Table 5 – TNPA – Cyclical volume and growth: January 2020, 2024, and 2025

	2019	2023	2024	Growth: '20-'25	Growth: '24-'25
Containers (TEUs)	**347 651**	**326 671**	**335 403**	**-4%**	**3%**
Landed	174 955	178 257	184 502	5%	4%
Shipped	172 696	148 414	150 901	-13%	2%
Dry bulk (MT)	16 136 610	13 378 905	14 732 388	-9%	10%
Liquid bulk (MT)	3 185 728	2 987 092	3 446 354	8%	15%
Breakbulk (MT)	324 765	540 860	535 458	65%	-1%
Vehicles (Units)	39 879	49 745	53 161	33%	7%
Total cargo (excl. Vehicles)	**19 647 103**	**16 906 857**	**18 714 200**	**-5%**	**11%**

Source: TNPA, updated 19/02/2025.

The matter of decreased transhipments has been a constant factor of late. South Africa has seen a significant transhipment reduction – from **23% of total containers in 2016** to only **13% last year**. The following shows the respective development since 2017:

Figure 6 – Total transhipment containers, all ports (2017-2025, TEUs)



Source: TNPA, updated 19/02/2025.

This downward trend weakens port competitiveness, leading to lost revenue, diminished economies of scale, and reduced global shipping connectivity. Moreover, the shift of transhipment cargo to alternative hubs like Walvis Bay and Maputo highlights inefficiencies in local port operations. To reverse this, urgent interventions are needed—improving port productivity, reducing turnaround times, and enhancing regional integration. South Africa risks losing its strategic position in regional and global maritime trade without action.

c. Summary of port operations

i. Weather and other delays

- Cape The Port of Cape Town conceded more than 40 operational hours this week to adverse weather.

- The main operational constraints in Durban proved to be adverse weather and continuous equipment breakdowns.
- Inclement weather conditions mainly impacted operations at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

ii. Cape Town

On Thursday, CTCT recorded three vessels at berth and nine at anchor, as strong winds proved to be the primary operational constraint. The Port of Cape Town remains on the first page of Linerlytica's "*Port Congestion Watch*", with a queue-to-berth ratio of **2,5**.[7] On the landside, between Monday and Thursday, the terminal managed to service 1 510 trucks while handling approximately 171 rail units. On the waterside, the terminal executed approximately 2 072 container moves across the quay during the same period. During the week, the terminal conceded more than 40 operational hours to adverse weather. Stack occupancy for **GP containers was recorded at 30%**, **reefers at 56%**, and **empties at 43%**. Additionally, the terminal operated with **eight STS cranes**, **24 RTGs**, and **68 hauliers** towards the end of the week. The terminal operated with nine STS cranes for most of the week before Crane LC9 was handed over to the technical team for maintenance.

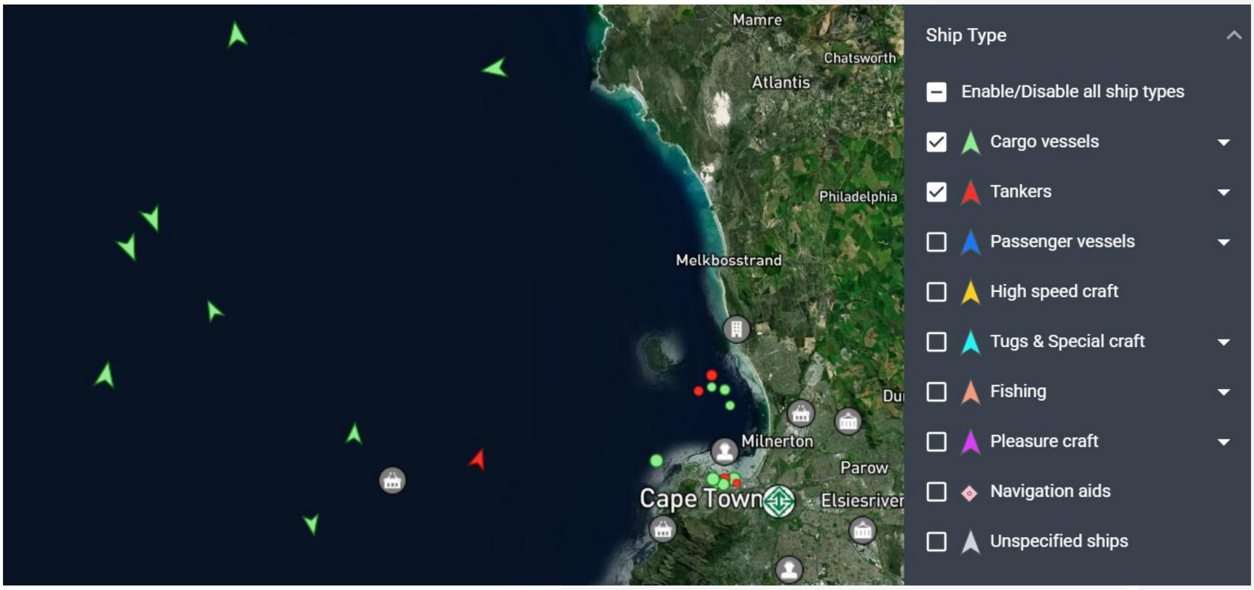
On Thursday, CTMPT recorded two vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 283 container moves and 1 483 tons of cargo across the quay on the waterside. On the landside, 212 trucks were processed during the same period. Stack occupancy was recorded at 46% for general cargo, 32% for reefers, and 21% for empties. Towards the end of the week, the terminal operated with two cranes. Crane LM400 made a welcome return to operations; however, Crane LM550 suffered a burst pipe, rendering the machine out of commission.

Between 10 and 16 February, the FPT terminal handled nine vessels: six multi-cargo, two dry bulk, and one container vessel. Berth occupancy during this period was recorded at 72%. The terminal planned to handle nine more vessels between 17 and 23 February, with another nine vessels scheduled between 24 February and 2 March. The late arrival of cargo and adverse weather conditions ensured operational constraints during this period.

The latest reports from Maersk suggest that the CF Athena will be phased into the Cape Town Express service on 25 March and will subsequently replace Gardiner. Additionally, it was announced towards the end of the week that the Maersk Zambezi will omit Cape Town to recover her schedule after experiencing extensive berthing delays. The Maersk Zambezi will proceed to call Coega.

[7] Linerlytica. 20/02/2025. Port Congestion Watch.

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



Source: Marine Traffic. Updated 23/02/2025 at 14:00.

iii. Durban

The Port helicopter remained out of commission this week as the technical team is currently performing maintenance operations on the aircraft. The latest reports suggest the aircraft should return to operations around 24 February.

On Thursday, Pier 1 recorded one vessel on berth, operated by two gangs, with one vessel at anchor. Stack occupancy was **56%** for **GP containers**. Between Monday and Thursday, the terminal executed approximately 3 874 gate moves and 267 rail moves on the landside. Road evacuation was much the same as last week. The **average TTT** for the week was **~99 minutes** (**↑1%**, w/w) and an average **staging time** of **~99 minutes** (**↑94%**). Additionally, the terminal moved over 4 800 TEUs across the quay on the waterside during the same period. The terminal operated with **four STS cranes** and **ten RTGs** towards the end of the week. The terminal experienced some operational delays due to strong winds and equipment breakdowns towards the end of the week.

Pier 2 had three vessels on berth and none at anchorage on Thursday, as adverse weather and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **37%** for **GP containers**. The terminal operated with **ten gangs** and moved over 11 500 containers across the quay between Monday and Thursday on the waterside. Approximately 7 633 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~63 minutes** (**↓13%**, w/w) and another low staging time of **~40 minutes** (**↑25%**). Approximately 1 445 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **52** and **56** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **61%** during this period. Thursday's most notable crane absentees were Cranes 520, 522, 525, 529, and 532. Crane 520 is expected to return to service around 28 February, while Crane 522 was anticipated to return to operations before the weekend. Cranes 525, 529, and 532 were anticipated to return to operations before close of business on Thursday.

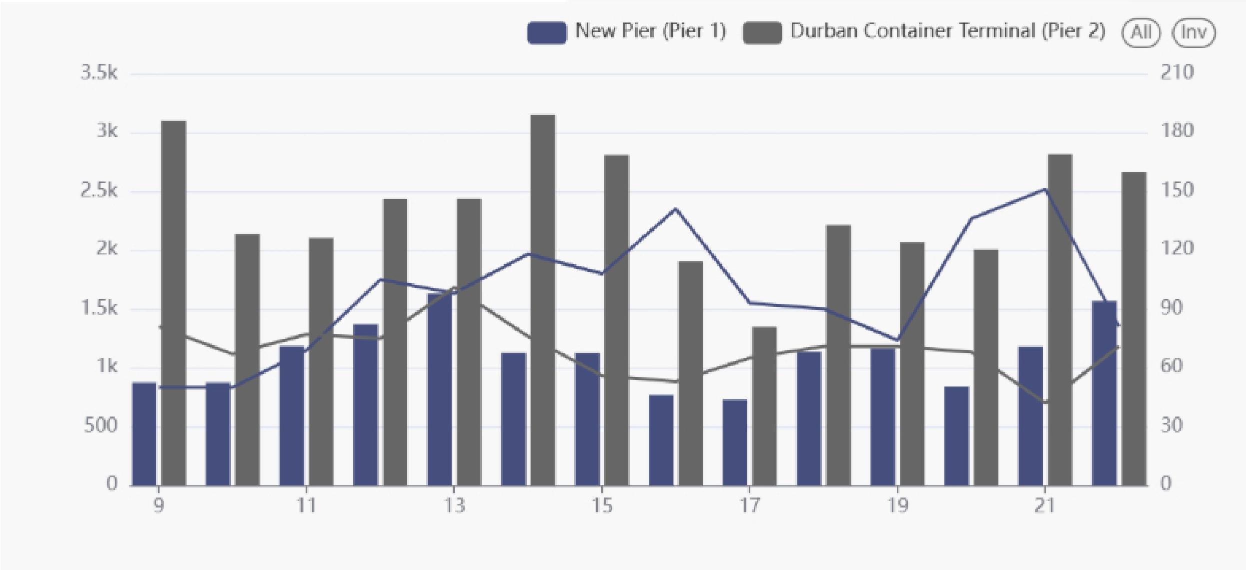
Durban's MPT terminal recorded two vessels at berth on Thursday and none at outer anchorage. Stack occupancy for containers was 20%, with the breakbulk stack around 5%. In the preceding 24 hours, the terminal handled 334 containers and zero tons of breakbulk on the waterside. On the landside, 440 container trucks and zero breakbulk RMTs were serviced. During this period, two cranes, eight reach stackers, seven forklifts, and 15 ERFs were in operation. The third crane experienced an issue with its battery towards the end of the week with no ETR communicated yet.

On Wednesday, the Maydon Wharf MPT recorded zero vessels at berth or at anchor. On the waterside, no volumes were handled across the quay due to no vessel being on the berth. On the landside, 15 trucks were handled during the same period, containing approximately 533 tons. No waterside nor landside volumes were handled at the agri-bulk facility this week.

On Thursday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with one at anchorage. In the 24 hours before, the terminal handled 841 road and 220 rail units on the landside while handling 2 166 units on the waterside. Overall stack occupancy was 83%, 50% at Q&R, and 40% at G-berth. During this period, the terminal had 146 high-and-heavies (abnormal loads) on hand and managed to handle seven.

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.

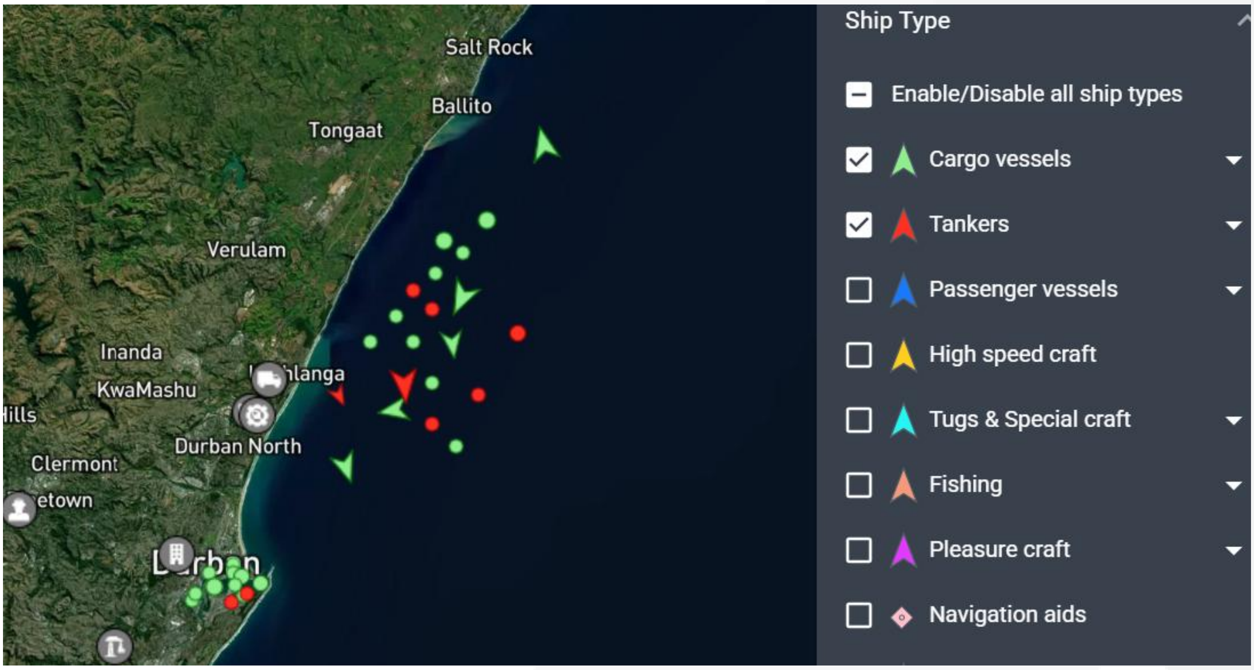
Figure 8 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 23/02/2025.

The queue of container vessels waiting outside Durban remains relatively low. On Monday evening (24 February), **one** container vessel was waiting for Pier 1, **one** for Pier 2, and **four** for Point. Several dry, liquid, and breakbulk vessels remain in the queue, as evidenced by the snapshot:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 23/02/2025 at 14:00.

iv. Richards Bay

On Thursday, Richards Bay had 12 vessels at anchor and 11 on the berth, translating to four vessels at DBT, five at MPT, one at RBCT, and one at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources towards the end of the week. The daily average for the week increased significantly to around **138 000 tons** (**↑35%**, w/w). An average of **21 trains** (no change from last week) were serviced on the landside, still slightly below the target of 22. Last week, TNPA reported that it had signed two terminal operator agreements to develop the country's first Liquefied Natural Gas (LNG) import terminal and a liquid bulk terminal at the Port of Richards Bay. Forming part of the Government's Just Transition programme, the import terminal agreement is effective for 25 years. It aims to introduce at least 6 000 MW of gas-to-power projects to meet the country's limited and depleting energy supply.

v. Eastern Cape ports

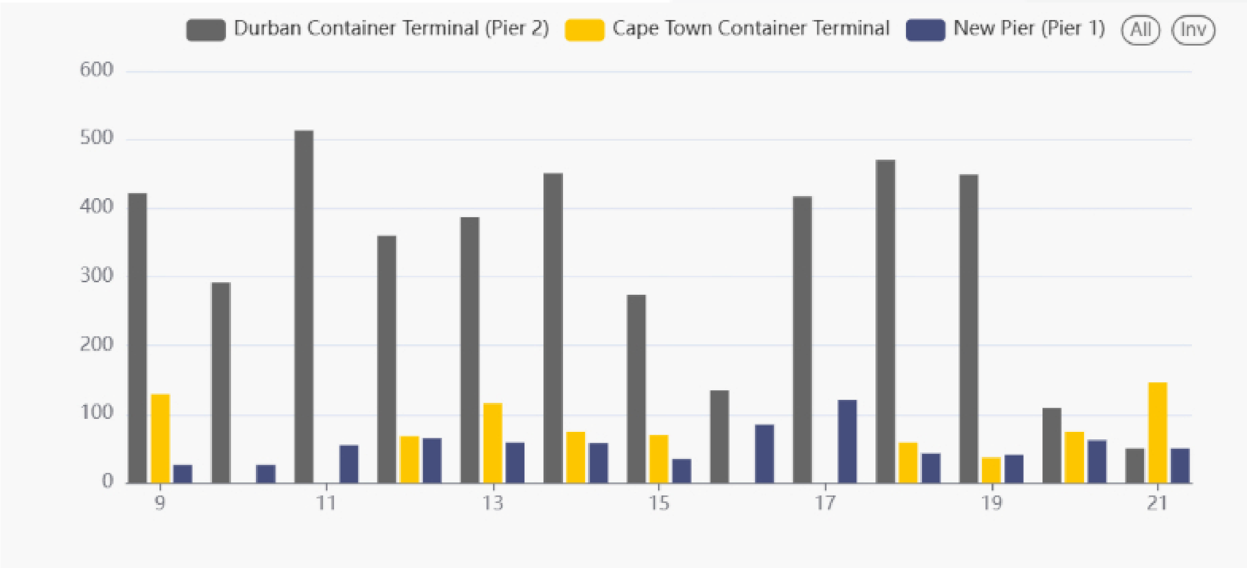
On Thursday, NCT recorded one vessel on berth and one at anchor, with none drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. Stack occupancy figures were recorded at 20% for reefers, 71% for reefer ground slots, and 33% for the general stack. Despite being windbound for over 17 hours, the terminal handled approximately 992 TEUs and seven reefers on the waterside. Approximately 335 trucks were processed on the landside at a TTT of ~32 minutes.

On Wednesday, GCT had zero vessels at berth or at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the preceding 24 hours. During this period, 106 trucks were processed at a TTT of ~20 minutes on the landside, while 106 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 6% for the general stack, 1% for reefers, and 7% for reefer ground slots. The terminal experienced some operational constraints, such as adverse weather conditions and vacant berths.

vi. Transnet Freight Rail (TFR)

Between Tuesday and Wednesday, the line between Durban and Maritzburg was closed due to a slack on the line. It remains unclear what the cause of the slack was; however, early suspicions indicate that it could be a result of the adverse weather experienced in the area. Additionally, towards the end of the week, DCT Pier 2 had 269 ConCor units on hand with a dwell time of 120 hours and 331 over-border units with a dwell time of 53 days.

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



Source: Calculated using data from Transnet, 2024. Updated 23/02/2025.

In the last week (*17 to 23 February*), rail cargo out of Durban was reported at **2 987** containers, up ↑7% from the previous week's **2 795** containers.

vii. General Scheduling Update

The latest reports from Maersk suggest that despite the return of the Cape Town southeasterly wind, the much-improved operational environment in South Africa continues. CTCT and CTMPT seemingly have 5-7 days' waiting time, with this number expected to increase in the near future. Waiting times at all other terminals are currently sitting between 0 and 1 day. Additionally, the same reports suggest that the political situation in Mozambique has eased, with Beira and Maputo's waiting times retracting. Port Louis has fully recovered, restoring productivity and move count. Finally, The MSC Resilient III 508N will make a split call in Cape Town to mitigate weather-related delays at CTCT, with discharge at CPT FPT on 1 March and loading at CPT MPT on 7 March, following its arrival in Durban on 25 February.

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 10 February. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *February 2024* averaged **~810 675 kg** daily. The daily average of air cargo handled at ORTIA in the previous week amounted to **525 559 kg** inbound (**↓7%**, w/w) and **354 512 kg** outbound (**↑6%**).

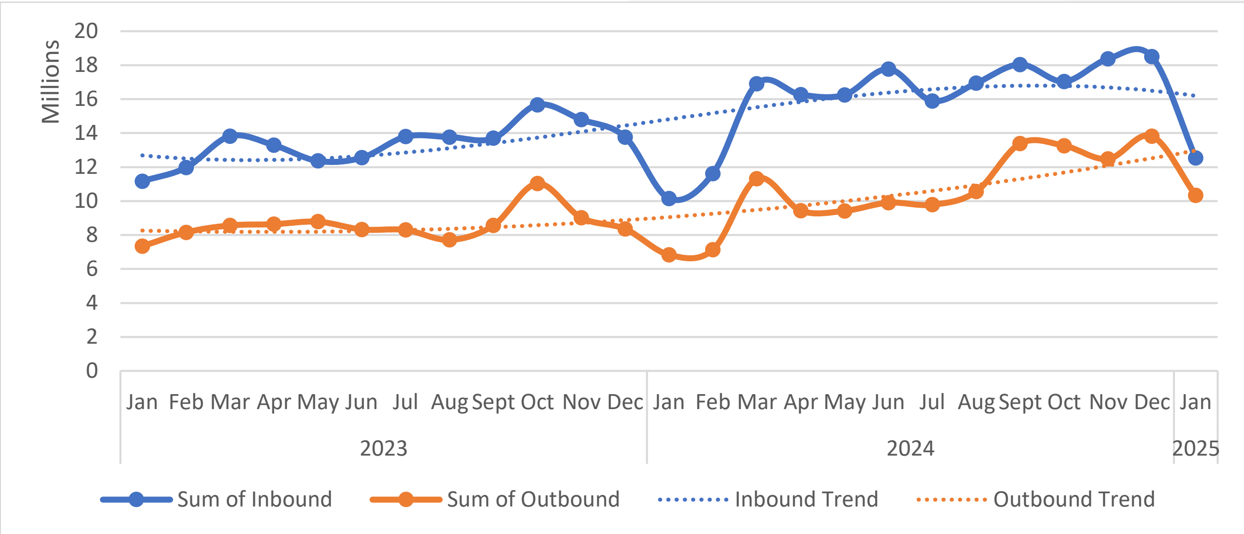
Cargo is still above the average levels of 2024 (**↑9%**, y/y) and also above the pre-pandemic levels of 2020 (**↑3%**). The following figure shows the air cargo flows to and from ORTIA since the start of 2023:

Table 6 – International inbound and outbound cargo from OR Tambo

Flows	10-Feb	11-Feb	12-Feb	13-Feb	14-Feb	15-Feb	16-Feb	Week
Volume inbound	369 598	216 062	347 574	153 745	309 620	285 929	1 996 383	**3 678 911**
Volume outbound	130 221	126 900	200 935	159 160	138 814	195 779	1 529 778	**2 481 587**
Total	**499 819**	**342 962**	**548 509**	**312 905**	**448 434**	**481 708**	**3 526 161**	**6 160 498**

Courtesy of ACOC. Updated: 23/02/2025.

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

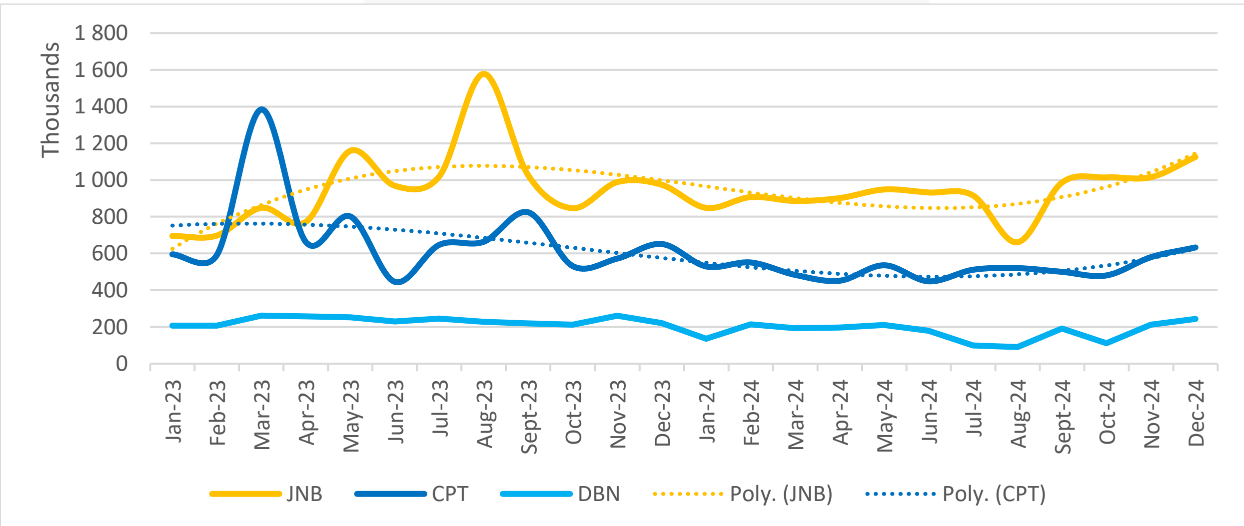


Calculated from ACOC. Updated: 23/02/2025.

b. Domestic air cargo

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

Figure 12 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 23/02/2025.

3. Road and Regional Update

a. Lebombo border post update

As of the week spanning 17 to 23 February, cargo flows relatively unabated across the N4 corridor, with only minor issues reported. The following notes summarise the recent developments:

- Truck volumes are steady compared to last week at **1 358 HGVs per day**, with an average queue of less than **3 km** and an average border time of around **4,5 hours** per crossing.
- Rail to Maputo has increased **to six trains a day** on average in the last week.
- Sugar trains from Eswatini are constant at around **two trains a day** (reporting inconsistent).

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

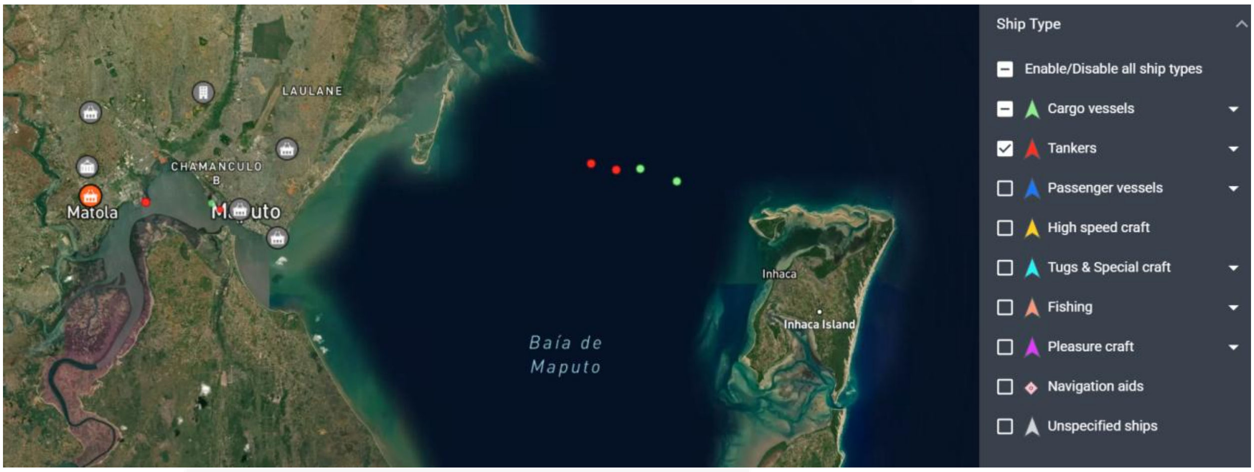
Table 7 – Lebombo border post update

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	Empty Minerals	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**
10-Feb-25	1 267	1 251	1 048	112	15	58	18	No delays	272	**11**	8	1	2
11-Feb-25	1 106	1 016	732	183	26	58	19		251	**7**	3	2	2
12-Feb-25	1 617	1 501	1 072	238	59	74	58		252	**8**	5	1	2
13-Feb-25	1 457	1 367	919	286	47	55	60		226	**7**	5	1	1
14-Feb-25	1 377	1 304	841	278	42	66	77		204	**0**	*	0	*
15-Feb-25	1 527	1 473	1 059	272	32	49	61		244	**1**	*	1	*
16-Feb-25	1 155	1 249	900	221	40	25	63		183	**6**	5	0	1
% of design capacity	91%	87%	78%	114%	n/a	110%	102%	n/a	12%	29%	52%	14%	40%
% change (d/d)	-24%	-15%	-15%	-19%	25%	-49%	3%	n/a	-10%	-13%	n/a	n/a	-50%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 23/02/2025.
** = 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 23/02/2025 at 14:00.

b. SADC cross-border and road freight delays

This week, the following challenges and delays affecting roads in South Africa and the broader SADC region:

- The median border crossing times at South African borders increased very slightly – by around **10 minutes**, averaging **~11,3 hrs** (**↑2%**, w/w) for the week.
- In contrast, the greater SADC region (excluding South African controlled) increased by approximately **half an hour** from last week, averaging **~5,0 hrs** (**↑11%**).

1. **Weather-related delays – Groblersbrug, Sikwane, Tlokweng, and Pitshane :**
    a. Heavy rains in the Thabazimbi region have raised concerns about rising water levels at Groblersbrug.
    b. Gaborone has also experienced heavy rain, which delays operations. Due to adverse weather and power outages, BURS temporarily halted operations at Sikwane, Tlokweng, and Pitshane border posts.
2. **Kopfontein power failures:**
    a. Eskom outages and generator failures disrupted operations at Kopfontein.
3. **Zeerust protests:**
    a. Roads were blocked with branches due to unknown protest reasons. Additional issues were reported on the road towards Pioneer Gate.
4. **Harare-Beitbridge road conditions:**
    a. Complaints about severely deteriorated road conditions have forced some drivers to take 50 km detours—no official updates on planned improvements.
5. **New transporter cost on Likasi Bypass (DRC):**
    a. A $10 fee for a CONADESI document (National Commission for Disarmament & International Security) has been introduced. Authorities are engaging with a DRC minister for further clarity
6. **Katima Mulilo weighbridge to operate 24/7:**
    a. Announced last Tuesday, the weighbridge will function 24 hours a day from 1 April 2025 to improve efficiency.

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	501	26,7	7,3	27,0	15 030	3 507
Beitbridge	Zimbabwe-SA	420	9,2	1,5	9,1	12 600	2 940
Groblersbrug	SA-Botswana	257	19,2	2,2	19,1	7 710	1 799
Martins Drift	Botswana-SA	181	2,6	0,4	2,4	5 430	1 267
Kopfontein	SA-Botswana	232	7,8	1,5	7,5	6 960	1 624
Tlokweng	Botswana-SA	26	0,8	0,2	0,5	780	182

[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.

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
Vioolsdrift	SA-Namibia	30	5,8	2,1	5,5	900	210
Noordoewer	Namibia-SA	20	1,8	0,4	1,5	600	140
Nakop	SA-Namibia	30	4,8	0,5	4,5	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,4	1,1	600	140
Skilpadshek	SA-Botswana	265	12,5	1,5	12,3	7 950	1 855
Pioneer Gate	Botswana-SA	68	0,0	0,0	0,0	2 040	476
Lebombo	SA-Mozambique	1 358	3,8	0,5	3,5	36 540	8 526
Ressano Garcia	Mozambique-SA	1 218	2,2	0,2	2,1	40 740	9 506
Sum/Average		**4 626**	**7,0**	**1,3**	**6,9**	**138 780**	**32 382**

Source: TLC, FESARTA, & Crickmay, week ending 16/02/2025.

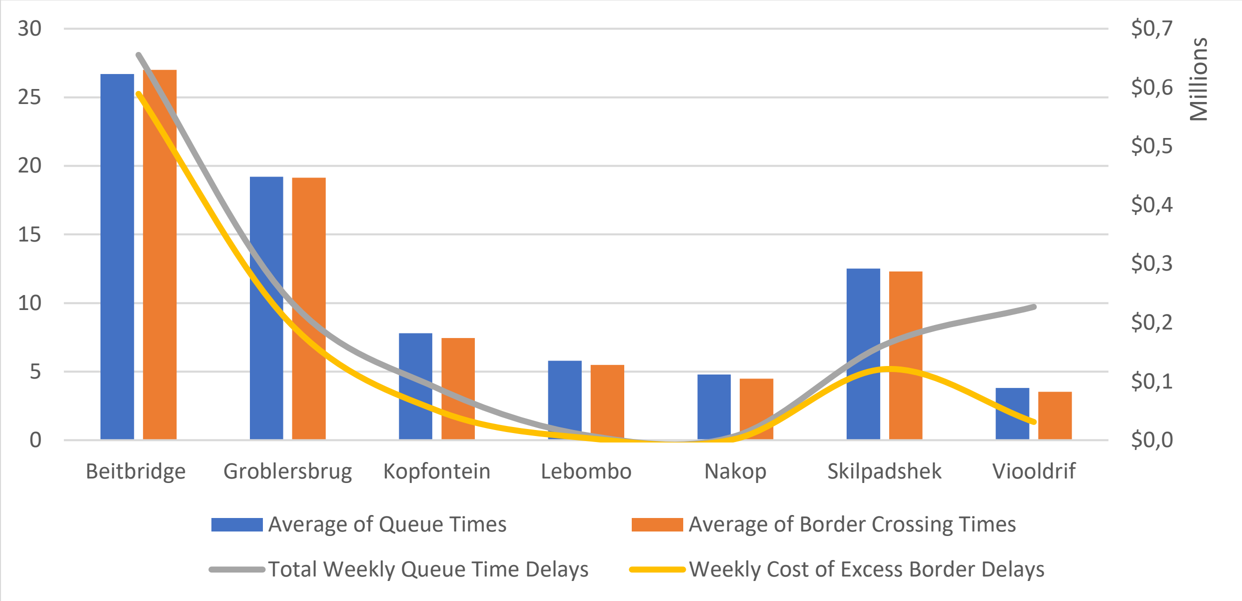
Table 9 – Delays summary – Corridor perspective

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	9,4	2,4	9,0	67 200	2 240
Central Corridor	798	1,8	0,3	1,8	167 580	5 586
Dar Es Salaam Corridor	1 819	14,3	3,1	14,4	381 990	12 733
Maputo Corridor	2 576	3,0	0,4	2,8	540 960	18 032
Nacala Corridor	127	0,0	0,0	0,0	26 670	889
North/South Corridor	3 689	10,4	2,1	11,2	774 690	25 823
Northern Corridor	2 817	1,1	0,1	1,1	647 640	21 588
Trans Caprivi Corridor	116	5,8	0,3	5,7	24 360	812
Trans Cunene Corridor	100	0,0	0,0	0,0	21 000	700
Trans Kalahari Corridor	363	4,2	0,6	4,1	76 230	2 541
Trans Oranje Corridor	100	3,4	0,8	3,1	21 000	700
Sum/Average	**12 825**	**5,5**	**1,0**	**5,7**	**2 749 320**	**91 644**

Source: TLC, FESARTA, & Crickmay, week ending 16/02/2025.

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

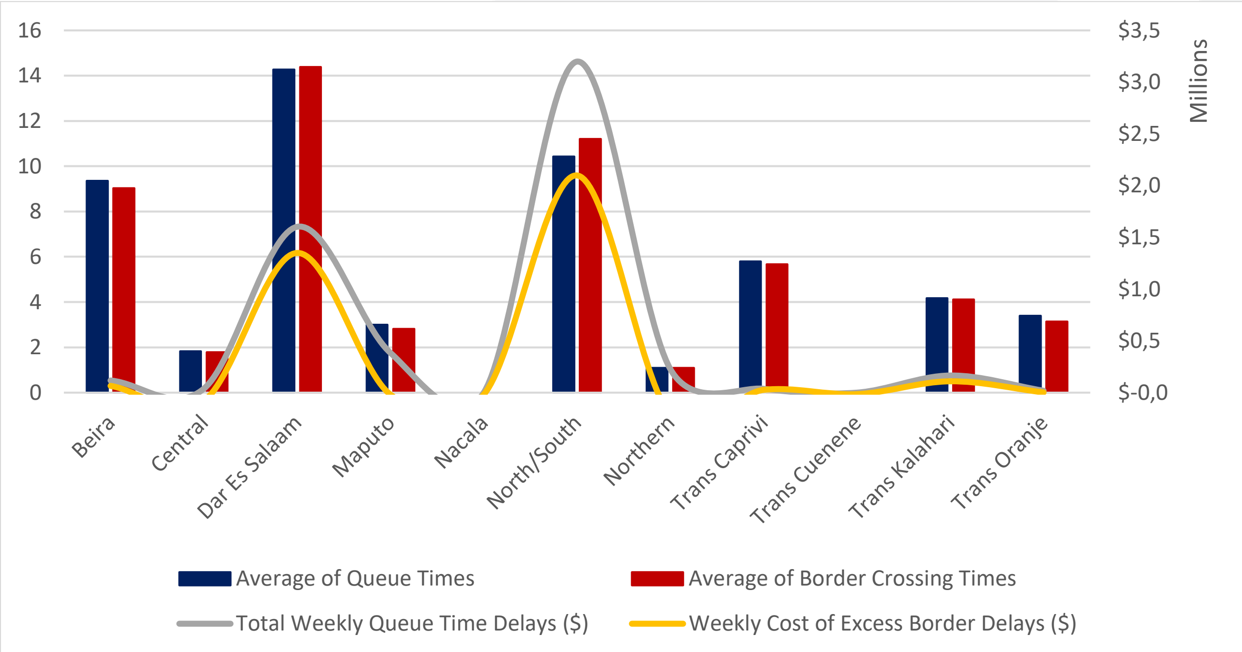
Figure 14 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 16/02/2025.

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 16/02/2025.

In summary, cross-border queue time averaged **~5,5 hours** (up by **~0,6 hours** from the previous week's **~4,9 hours**), indirectly costing the transport industry an estimated **$5,8 million** (**R106 million**). Furthermore, the week's average cross-border transit times hovered around **~5,7 hours** (up by **~0,5 hours** from the **~5,2 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,3 million** (**R61 million**). As a result, the total indirect cost for the week amounts to an estimated **~$9 million** (**R167 million**, down // up by **~R25 million** or **↑17%** from **~R142 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)** emerging market logistics, **(b)** the global shipping industry and **(c)** the global aviation industry.

a. Emerging market logistics

In the 2025 "*Agility Emerging Markets Logistics Index*" published last week, South Africa has demonstrated a commendable improvement, ascending to the 23rd position from 24th in the previous year. This advancement is a positive story in our industry amid all the chaos and underscores the nation's resilience and strategic restructuring initiatives to enhance its logistics and business environment.[10] The index assesses the competitiveness of 50 emerging economies based on their logistics strengths, business environments, and infrastructure, ranking them according to their ability to facilitate domestic and international supply chain operations.

A significant contributor to this progress is South Africa's robust performance in international logistics opportunities, which now ranks 17th, indicating that we are still a global player. Moreover, the reports note South Africa's commitment to digital transformation has bolstered its competitiveness. The integration of advanced technologies in supply chain management and the promotion of e-commerce have opened new avenues for growth, positioning the country as a dynamic player in the global logistics arena. Despite global economic uncertainties, South Africa's upward trajectory in the Index highlights its potential as a logistics hub in Africa. Consequently, as analysed this week, we desperately need to increase our transhipments.

Interestingly, the report further highlights a significant shift in global supply chains, with **54%** of surveyed logistics professionals planning to relocate production or sourcing from China by 2030 – a **↑17%** increase from the previous year.[11] This trend indicates a strategic rebalancing of supply chains, presenting opportunities for emerging markets to enhance their logistics capabilities and attract new business – including South Africa.

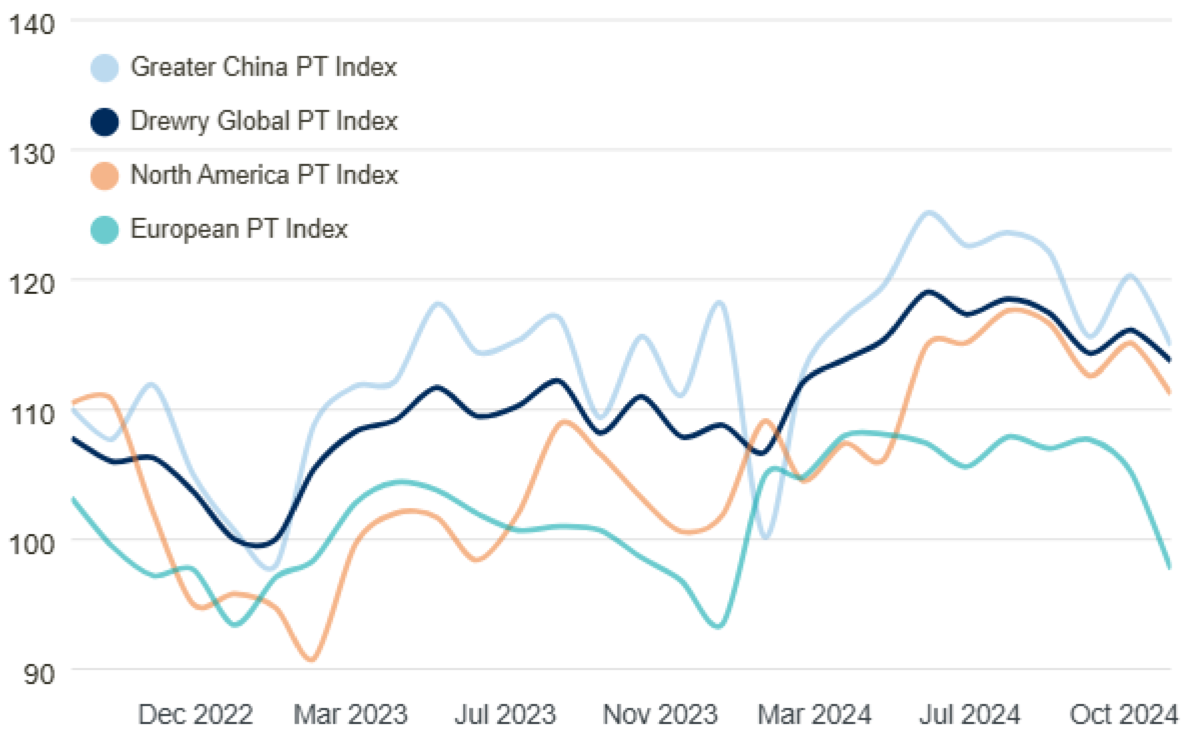
b. Global shipping industry

i. Port throughput index

Drewry's "*Global Container Port Throughput*" Index for December stood at **113,7 points**, reflecting a **↓2%** month-on-month decrease but a **↑5,4%** year-on-year increase. This suggests a seasonal decline in port activity compared to the previous month, yet an overall growth in container throughput relative to the same period last year:

[10] Agility. 2025. Emerging Markets Logistics.
[11] Goldstone, C. 18/02/2025. 'Clear winners and losers' as global supply chains are rebalanced.

Figure 16 – Dry Bulk outlook (to 2029) and fleet/orderbook



Source: Drewry

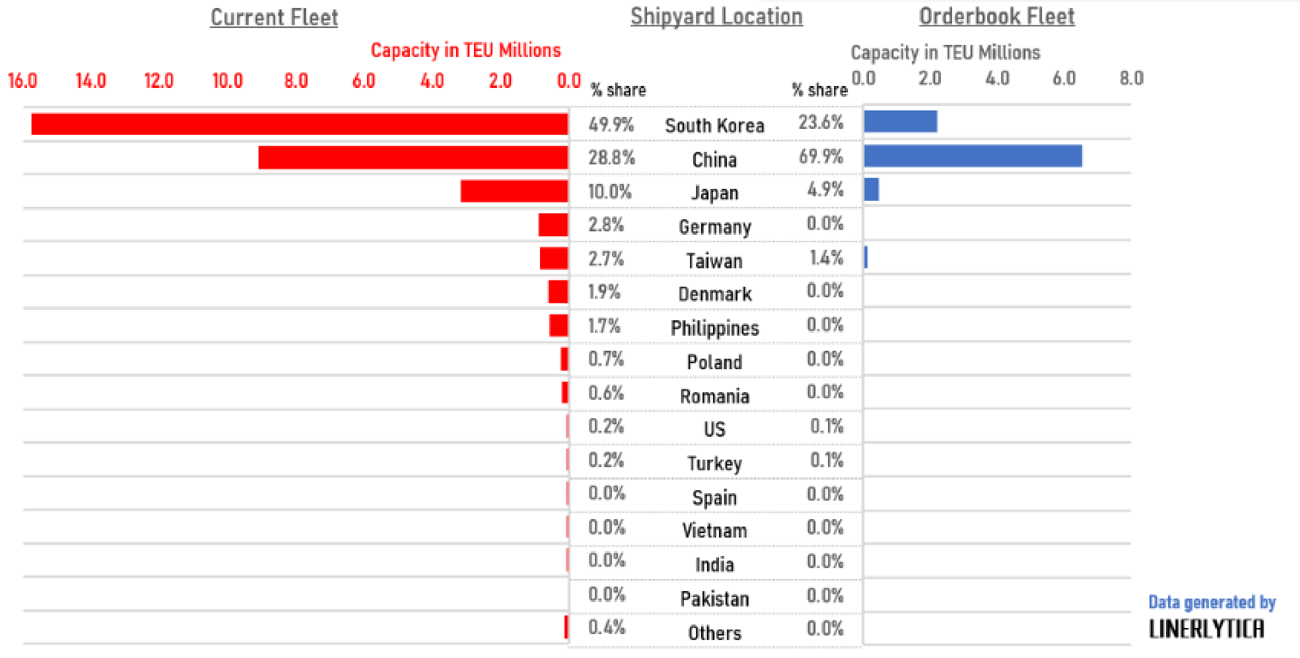
For Africa, the figures point to a **↓1,2%** month-on-month decrease but a **↑1%** year-on-year increase, albeit from a small sample size (including South Africa).

ii. Container summary and orderbook update

The US Trade Department has proposed levies of up to **$1,5 million** per vessel call on Chinese shipping companies and operators of Chinese-built ships at US ports, with an additional **$1 million** for companies with orders at Chinese shipyards.[12] This action could prompt carriers to remove Chinese-built ships from US routes, leading to significant disruptions, as Chinese carriers currently handle **17%** of US container imports from the Far East. While Taiwanese and Korean carriers might benefit due to their limited use of Chinese-built vessels, overall freight rates are declining. Carriers are struggling to manage capacity amid the introduction of new Alliance services, and forward schedules indicate capacity increases in March, suggesting that rate hikes may remain unattainable without strategic adjustments. The following side-by-side indicates the current fleet and orderbook:

[12] Linerlytica. 25/02/2025. Market Pulse – Week 08.

Figure 17 – Global container fleet order and orderbook by shipyard location (February 2025)



Source: Linerlytica

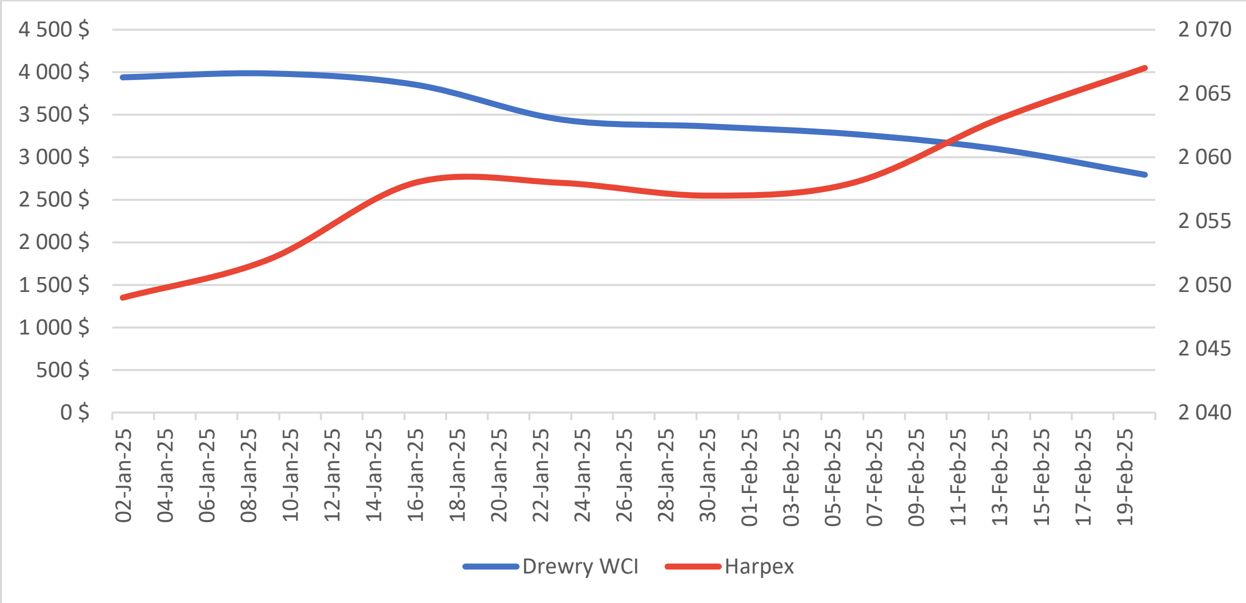
Elsewhere in the container sector, global port congestion was similar to last week, as some **2,59 million TEU** (around **8% of the global fleet**) is stuck in the system. Scheduling is steady, as Drewry's "*Cancelled Sailings Tracker*" trended around a **6% cancellation rate** of Pro-forma scheduling (24 February to 30 March).[13]

iii. Global freight and contract rates

Global container spot rates have dropped for a sixth week in a row – and this time, a substantial drop – as Drewry's "*World Container Index*" shed **$300** to last week's already declining spot rates. Global rates dropped **↓9,7%** this week to **$2 795 per 40-ft container**[14], the lowest level in nine months. Charter rates have continued to go the other directions, as the *Harper Petersen Index* (Harpex) traded around **2 067 points** (**↑78%**, y/y) on Friday:

[13] Drewry. 14/02/2024. Cancelled Sailings Tracker.
[14] Drewry. 13/02/2025. World Container Index.

Figure 18 – World Container Index ($ per 40ft, index) and Harpex Charter Index



Source: Calculated from Drewry and Harpex

The major drop in spot rates has influenced the latest round of contract discussions. While spot rates on major deep-sea trades have declined, as illustrated, long-term contract rates, with Xeneta reporting year-on-year increases of **↑57%** and **↑64%** for certain trade lanes.[15] Despite falling spot rates, carriers are maintaining pricing discipline in contract negotiations, offering substantial discounts for longer commitments, while shippers, wary of geopolitical uncertainty, are delaying tender processes to retain flexibility. Furthermore, Transpacific rates saw the steepest declines, with carriers resorting to price-cutting amid sluggish post-Chinese New Year factory production. At the same time, Asia-Europe rates also fell as cargo volumes remained insufficient to sustain high load factors. In response, carriers are planning general rate increases from March, but analysts warn that these hikes may not hold without capacity reductions.[16]

iv. Further developments of note

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

1. **DSV's merger and acquisition strategy to continue:**
   a. DSV plans to continue its aggressive M&A strategy, emphasising the importance of consolidation in the freight forwarding industry, with equity funding playing a key role in future transactions, as seen in its acquisitions of Panalpina, Agility, and DB Schenker.[17]
   b. In parallel, the company proposes a significant pay rise of at least 33% for its board members, citing the increasing complexity of integrating DB Schenker and managing DSV's expanding global operations.
2. **Slow and tentative Suez Canal recovery:**
   a. Egypt's Suez Canal Authority said 47 ships have rerouted to use the waterway since the start of February, a tentative recovery after a ceasefire between Israel and Hamas prompted Yemeni rebels to scale back attacks on Red Sea shipping.[18]

[15] Van Marle, G. 18/02/2025. Ocean carriers hold contract rates 'at a decent level', as spots tumble.
[16] Van Marle, G. 21/02/2025. Price war as carriers compete for cargo driving down container spot rates.
[17] Lennane, A. 18/02/2025. DSV agenda reveals it's eyeing more M&A – and pay rises for directors.
[18] El Wardany, S. 23/02/2025. Egypt says dozens of ships return to Suez Canal after ceasefire.

b. With more vessels returning to the Suez route, the Asia-Europe supply chain will gradually contract, reversing the lengthening effect observed in 2024 when vessels detoured around Africa.[19]

c. This contraction means that excess inventory built up during longer transit times will be released, leading to a temporary slowdown in import orders as businesses adjust to the shorter supply chain.

d. Consequently, Asia-Europe trade demand could experience a negative impact of approximately **↓2,9%** as the inventory effect unwinds, potentially unfolding over a shorter period than the initial supply chain extension.

c. Global air cargo industry

In the high-frequency metrics, worldwide air cargo tonnages have continued their recovery from the Lunar New Year (LNY) dip, which was less pronounced than last year. Following a **↓13%** global tonnage decline during the LNY period, volumes rebounded with two consecutive **↑3%** week-on-week increases. This compares to a **↓20%** drop and a **↑15%** rebound in the same period last year. The following shows the developments in the previous five weeks:

Figure 19 – Capacity, weight and rates by region (last two to five weeks, % change)

Origin Regions last 2 to 5 weeks (WORLD ACD)	Capacity¹			Chargeable weight¹			Rate¹		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-4%	+1%		+1%	+3%		+1%	+9%
Asia Pacific		-4%	-4%		-9%	+2%		-14%	-6%
C. & S. America		-7%	-8%		-14%	+10%		+0%	+0%
Europe		-0%	-0%		+4%	+1%		-0%	-1%
M. East & S. Asia		-2%	-4%		+3%	-4%		-6%	+14%
North America		-2%	-4%		+3%	+3%		+1%	-1%
Worldwide		-3%	-4%		-3%	+2%		-8%	-2%

Source: World ACD

On pricing, average spot rates from Asia Pacific origins increased by **↑2%** WoW to **$3,54/kg**, standing **↑9%** higher year-on-year. Rates to Europe remained stable at **$4,13/kg**, while Asia Pacific-USA rates rose **↑4%** to **$4,81/kg**. However, China-USA rates declined **↓6%** to **$3,74/kg**, while Japan-USA and South Korea-USA routes surged **↑28%** and **↑13%**, respectively.

Following on from last week, the abrupt suspension of the de minimis exemption for e-commerce imports from China led to an overwhelming surge in parcel volumes, which US Customs and Border Protection (CBP) was unprepared to manage, resulting in a rapid policy reversal. This situation highlights the operational challenges and potential cost increases associated with eliminating the de minimis threshold.[20]

In other air cargo news, Schiphol Airport plans to implement a **↑41%** increase in freight tariffs starting 1 April, as part of an average **↑37%** rise over three years, to fund necessary airport investments. Stakeholders argue that these hikes disproportionately affect freight operations and could undermine Schiphol's status as a major air cargo hub.[21]

[19] Sea Intelligence. 19/02/2025. Post-Red Sea: Major demand drop in Asia-Europe.
[20] Putzger, I. 17/02/2025. Alarm bells ringing with the end of de minimis – ultimately it will add costs.
[21] Lennane, A. 17/02/2025. New Schiphol tariff hikes unfair on freight and will 'harm air cargo hub' status.

ENDS[22]

[22]**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.*