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Cargo Movement Update #214[1]

Date: 1 December 2024

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[4])	32887	37467	**70 354**	33808	43470	**77 278**	↓9%
Air Cargo (tons)	4 201	3 219	**7 421**	4 779	3 004	**7 783**	↓5%

Monthly Snapshot

Figure 1 – Cyclical[5] cargo volume, year on year (% growth)

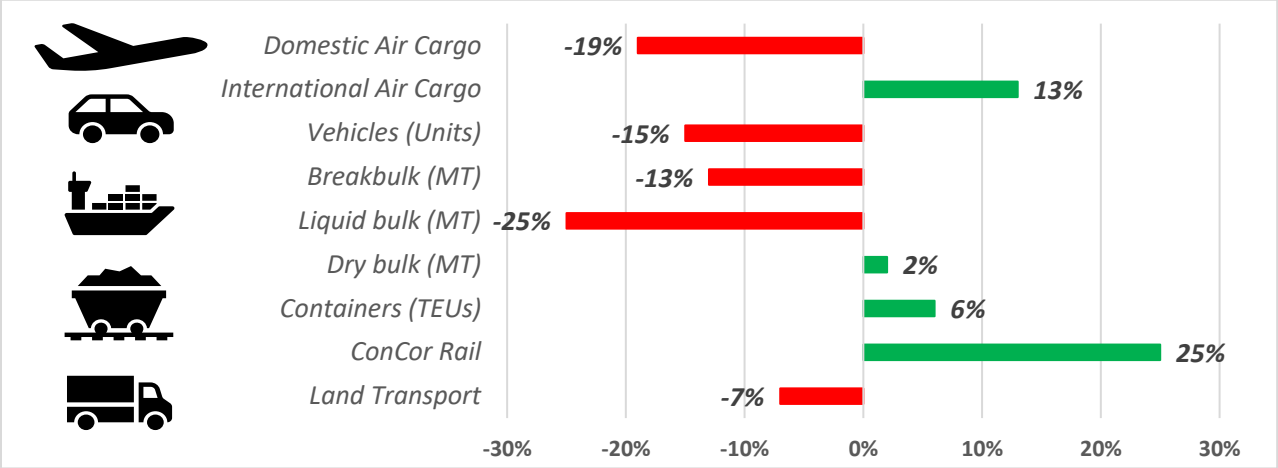
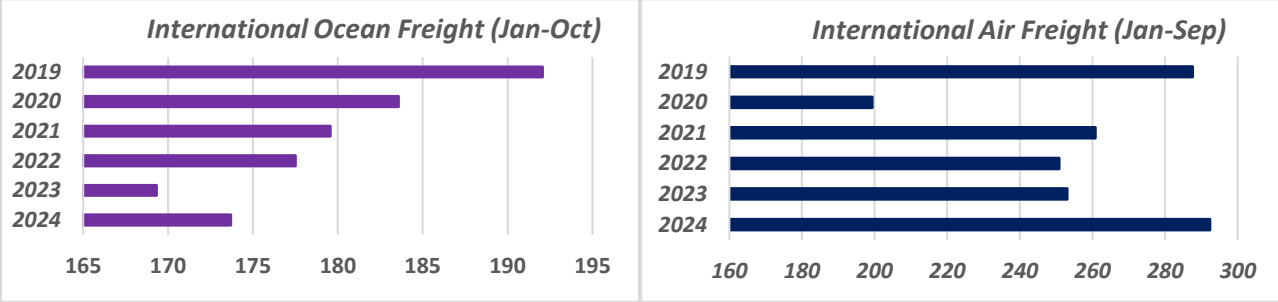


Figure 2 – Year-to-date flows 2019-2024[6]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~10 051 TEUs** was handled per day, with **~11 040 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 587** containers, down ↓26% from last week.
- SARS September trade stats – exports: **↑5,3%** (m/m); imports **↑4,4%**; YTD trade surplus: **R145,5 billion**.
- Cross-border queue: **↑0,3 hrs**; transit: **↓0,2 hrs**; SA borders: **15,0 hrs** (**↓12%**); SADC: **5,0 hrs** (**unchanged**).
- Global container rates decreased by **↓2,4%** (or **$82**) to **$3 331/40-ft**, as charter rates remain robust.
- Air cargo rates continued to rise in late November (**↑2%** to **$2,79/kg**), with tonnages holding firm.

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[1] This update contains an overview of air, sea, and road freight to and from South Africa in the last week. This report is the *214th* 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] Container volumes are now reported in TEUs to align with TPT. Furthermore, we will change the period of reporting to Monday-Sunday, as per TPT.
[5] '*Monthly*' means the last months' worth of available data compared to the same month in the previous year—all metrics: Oct vs Oct.
[6] 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 average of **10 051 TEUs** was handled per day, down from **11 040 TEUs** last week. Port operations were characterised by adverse weather, an oil spillage, dredging, equipment breakdowns and shortages. Minimal delays were reported at the Port of Cape Town this week; however, inclement weather, dredging, and equipment breakdowns ensured operational delays in Durban. An oil spillage incident and adverse weather represented the main operational constraints at our Eastern Cape Ports, while operations were delayed in Richards Bay due to unavailable marine equipment. The line between Johannesburg and Pretoria was heavily impacted by cable theft over the weekend, which rendered the line out of commission for a significant part of the week. Additionally, the latest reports suggest that the NRCS strike is ongoing (as of 20 November), with the workforce demanding an **↑8%** salary increase.

Globally, schedule reliability in the container industry improved slightly in October 2024, rising to **51,5%**, per *Sea-Intelligence's* GLP report. While reliability remains between **50%-55%**, the average delay for late arrivals decreased to **5,72 days**. Maersk led reliability (**57,9%**), while PIL lagged at **37,2%**. Eight carriers improved performance, with Wan Hai up by **↑5,4%**. Freight rates, while charter rates remained strong, with Harpex at **2 037 points**. Port congestion stayed stable at **2,4 million** TEU globally, and Durban saw a queue-to-berth ratio drop to **0,71**. Charter markets surged as MSC secured forward deals for large vessels and demanded extended contracts for smaller energy-efficient ships, reflecting carrier confidence in the market recovery.

The air cargo volume handled at ORTIA amounted to **600 198 kg** inbound (**↓12%**, w/w) and **459 917 kg** outbound (**↑7%**), which continues to grow substantially. However, because of the decrease in the inbound cargo, this week's overall numbers have decreased by **↓5%**. Still, the average numbers remain up on last year (**↑8%** versus November 2023) and a similar increase over pre-pandemic levels (**↑10%** versus November 2019). Internationally, tonnages hold firm while rates continue to build in peak season.

In the regional cross-border road freight trade, the average queue times increased by around **20 minutes** from last week, as the transit times decreased – by approximately a **quarter of an hour**. The median border crossing times at South African borders decreased by about **two hours**, averaging **15,0 hrs** (**↓12%**, w/w) for the week. In contrast, the greater SADC region (excluding South African controlled) largely stayed the same – averaging **~5,0 hrs** (**unchanged**, w/w). On average, five SADC border posts took more than a day to cross – Beitbridge, Chirundu OSBP, Kasumbalesa (the worst affected, taking **almost two days** to cross from both sides), Katima/Mulilo, and Skilpadshek. Other developments included **(1)** Skilpadshek and Kopfontein border posts updates and **(2)** Port of Maputo and Mozambique border developments.

Finally, as we are nearing the end of the year, it is worth revisiting some important aspects of our logistics network. The ongoing challenges surrounding the Pier 2 PSP framework underscore the critical need for alignment between private and public sector initiatives to transform South Africa's logistics landscape. These challenges relate to the reform across our entire network. Indeed, implementing the Freight Logistics Roadmap, grounded in vertical separation principles, reflects an opportunity to address inefficiencies, reduce costs, and restore competitiveness in global supply chains. However, achieving these objectives requires decisive action to resolve disputes, recalibrate frameworks, and establish clear oversight and performance-tracking protocols. As South Africa navigates this transitional phase, the importance of stakeholder collaboration, transparency, and data-driven decision-making cannot be overstated. These principles are foundational to cultivating a resilient and efficient logistics ecosystem across all modalities. Let this moment serve as a clarion call for a renewed focus on governance, innovation, and an unwavering commitment to SA Inc.'s long-term growth and sustainability.

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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. As previously mentioned, we have changed the reporting unit to TEUs and the week showing Mondays to Sundays to align with TPT.

Table 2 – Container Ports – Weekly flow reported for 25 November to 1 December (measured in TEUs)

7-day flow reported (25/11/2024 – 01/12/2024)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	3 740	26 179	↓17%
New Pier (Pier 1)	2 039	14 276	↓3%
Cape Town Container Terminal	1 214	8 500	↓30%
Ngqura Container Terminal	1 461	10 224	↓26%
Port Elizabeth Container Terminal	284	1 991	↑173%
Other	1 312	9 184	↑97%
Total	**10 051**	**70 354**	↓9%

Source: Calculated from TPT, 2024. Updated 01/12/2024.

A decreased average of **~10 051 TEUs** (↓9%) was handled per day for the last week (*25 November to 1 December, Table 2*), compared to the projected average of **~10 803 TEUs** (↓7% actual versus projected) noted in last week's report.

For the coming week, an increased average of **~10 720 TEUs** (↑7%) is predicted to be handled (*2 to 8 December, Table 3*). Port operations were mainly constrained by adverse weather, an oil spillage incident, dredging, equipment breakdowns, and shortages.

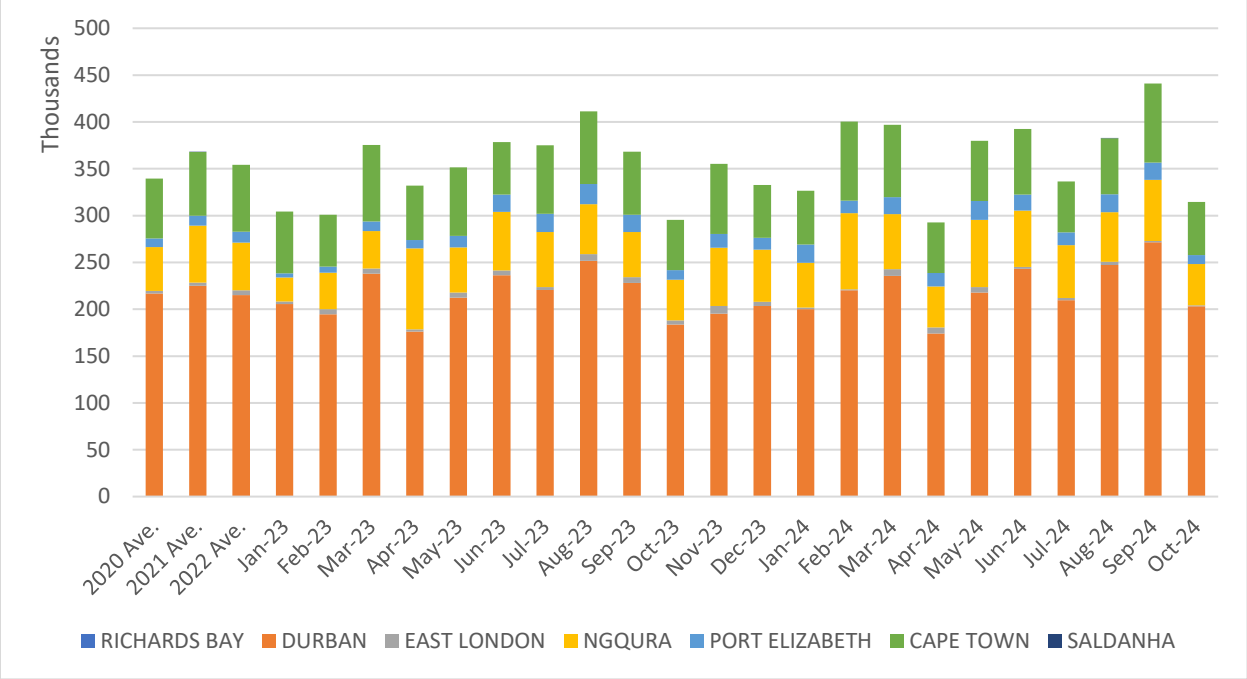
Table 3 – Container Ports – Weekly flow projected for 2 to 8 December (measured in TEUs)

7-day flow reported (02/12/2024 – 08/12/2024)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 307	30 146	↑15%
New Pier (Pier 1)	1 579	11 052	↓23%
Cape Town Container Terminal	2 128	14 895	↑75%
Ngqura Container Terminal	1 780	12 459	↑22%
Port Elizabeth Container Terminal	215	1 504	↓24%
Other	712	4 985	↓120%
Total	**10 720**	**75 040**	↑7%

Source: Calculated from TPT, 2024. Updated 01/12/2024.

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.

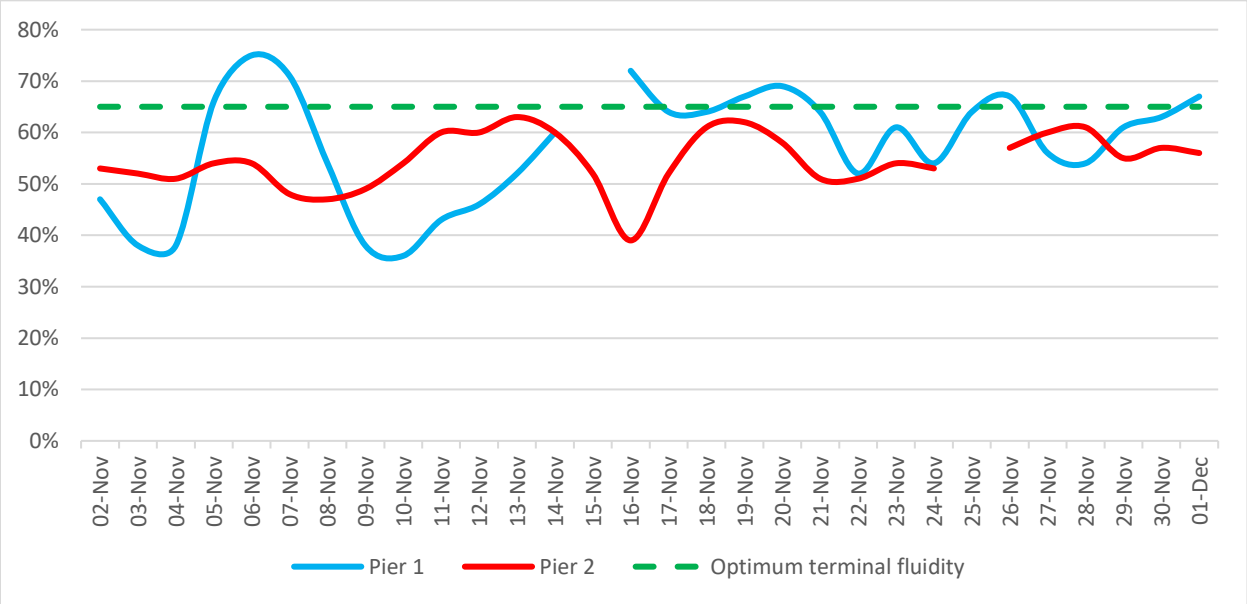
Figure 3 – Monthly flow reported for total container movement (TEUs 2020 to present, m/m)



Source: Calculated using data from TNPA, 2024, and updated 01/12/2024.

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

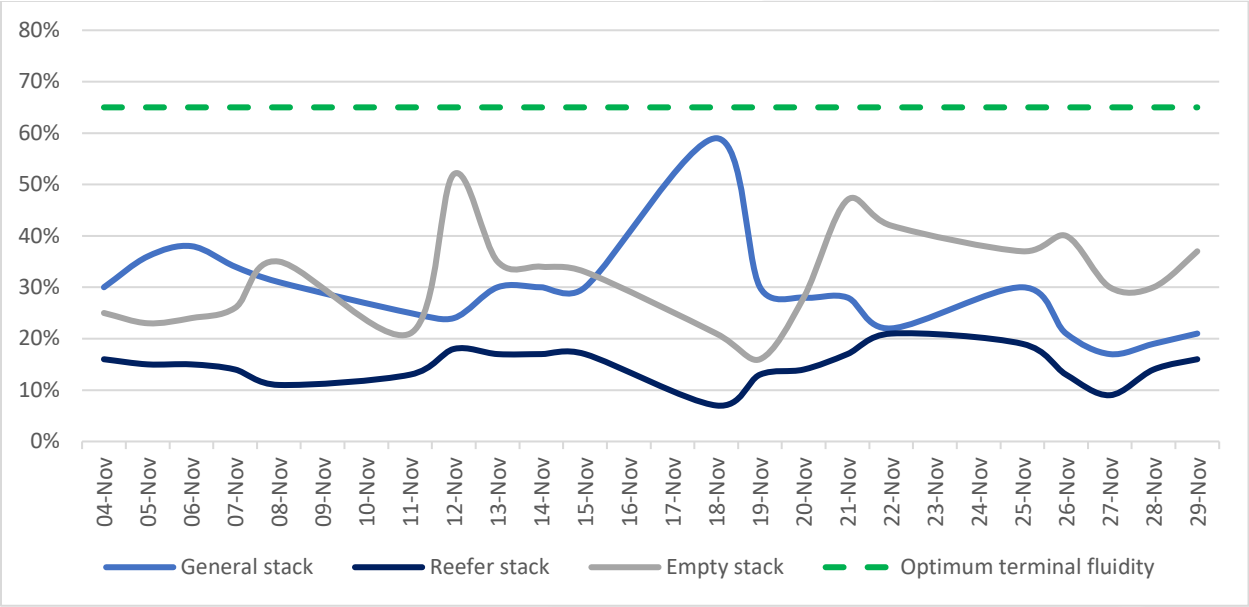
Figure 4 – Stack occupancy in DCT, general-purpose containers (2 November to present; a day on the day)



Source: Calculated using data from Transnet, 2024, and updated 01/12/2024.

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 (4 November to present, day on day)



Source: Calculated using data from Transnet, 2024, and updated 01/12/2024.

b. Summary of port operations

i. Weather and other delays

- Minimal delays were reported at the Port of Cape Town this week.
- Inclement weather, dredging, and equipment breakdowns ensured operational delays in Durban.
- An oil spillage and adverse weather represented the main operational constraints at our Eastern Cape Ports.
- Operations were delayed in Richards Bay due to unavailable marine equipment.

ii. Cape Town

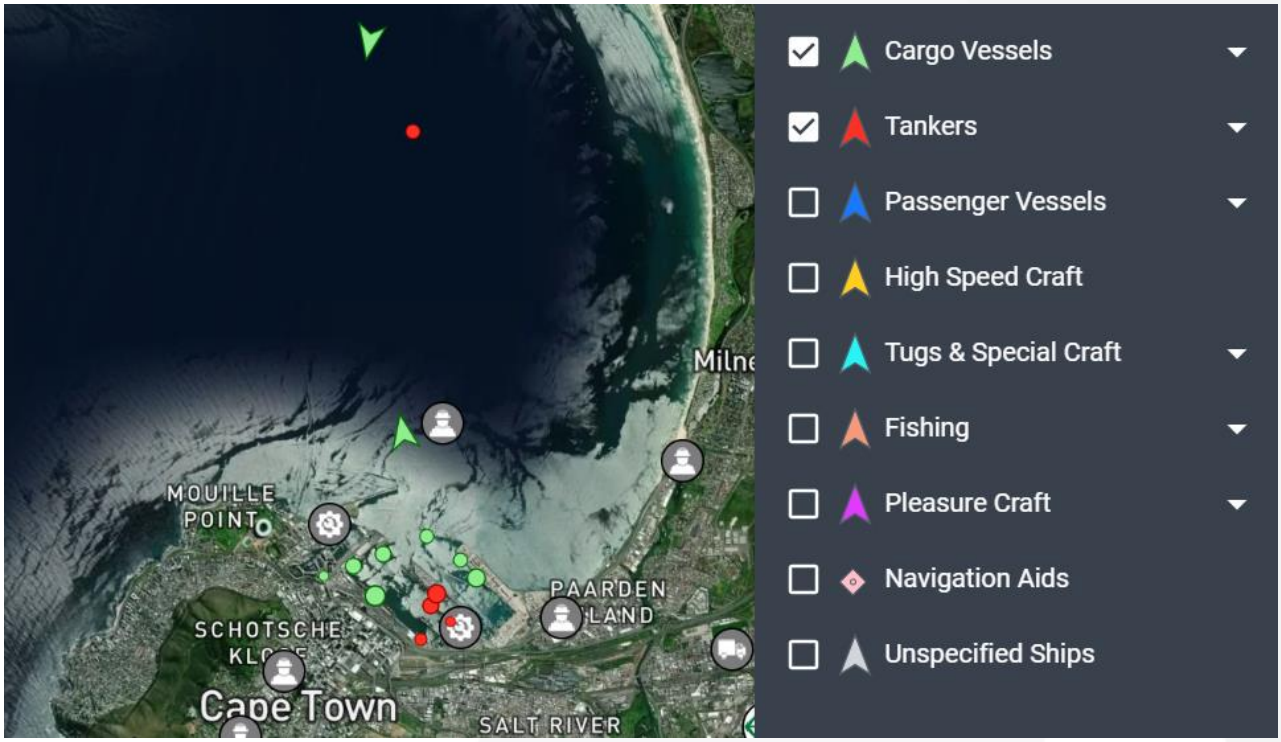
On Thursday, CTCT recorded two vessels at berth and zero at anchor as operations returned to some normality after the adverse weather experienced the previous week. Between Monday and Thursday, on the landside, the terminal managed to service 3 973 trucks while handling approximately 299 rail units. On the waterside, the terminal executed approximately 5 077 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 19%**, **reefers at 14%**, and **empties at 13%**. Additionally, the terminal operated with **seven STS cranes**, **24 RTGs**, and **65 hauliers** towards the end of the week. Crane LC6 was out of commission most of the week, with crane LC8 also going out of commission towards the end of the week. No ETR has been communicated for either machine yet.

On Thursday, CTMPT recorded one vessel at berth but zero vessels at anchor. In the preceding 24 hours, the terminal handled around 333 TEUs across the quay. On the landside, 264 trucks were processed during the same period. Towards the end of the week, stack occupancy was recorded at 79% for general cargo, 0% for reefers, and 152% for empties. The latest reports suggest that all three cranes, accompanied by three straddle carriers, were operational towards the end of the week.

The FPT terminal handled four vessels from 18 to 24 November, including three multi-purpose and one breakbulk vessel. Berth occupancy during this period was 23%. The terminal planned to handle five vessels

between 25 November and 01 December, with another six vessels scheduled for 02 to 08 December. Minimal delays were reported at the terminal during the week.

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



Source: Marine Traffic. Updated 01/12/2024 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, operated by three gangs, with another four at anchor. Stack occupancy was **54%** for **GP containers**. Between Monday and Thursday, the terminal executed approximately 4 519 gate moves and 248 rail moves on the landside. The **average TTT** for the week was **~82 minutes** (**↓4%**, w/w) and an average **staging time** of **~65 minutes** (**↓13%**). Additionally, the terminal moved approximately 5 853 TEUs across the quay on the waterside during the same period. The terminal operated with **five STS cranes** for most of the week and had **12 RTGs** in service towards the end of the week.

Pier 2 had four vessels on berth and another three at anchorage on Thursday, as adverse weather, dredging, and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **61%** for **GP containers**. The terminal operated with **11 gangs** and moved approximately 11 301 containers across the quay between Monday and Thursday on the waterside. During the same period, there were approximately 10 771 gate moves on the landside, with an **average TTT** of **~113 minutes** (**↑7%**, w/w) and a staging time of **~179 minutes** (**↑64%**) for the week. Approximately 1 290 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **44** and **49** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **52%** during this period.

The floating crane remained out of commission this week but is anticipated to return to operations soon. The port helicopter was in service sporadically this week and had to be taken out for planned maintenance due to a fuel shortage. At Pier 2, the most notable crane absentees towards the end of the week were cranes 520, 521, 522, and 530. Crane 521 did return to operations on Wednesday as anticipated; however, it went

out of commission once more after experiencing another breakdown. Crane 530 is expected back in service by 29 November, while crane 522 is expected back in service around 08 December.

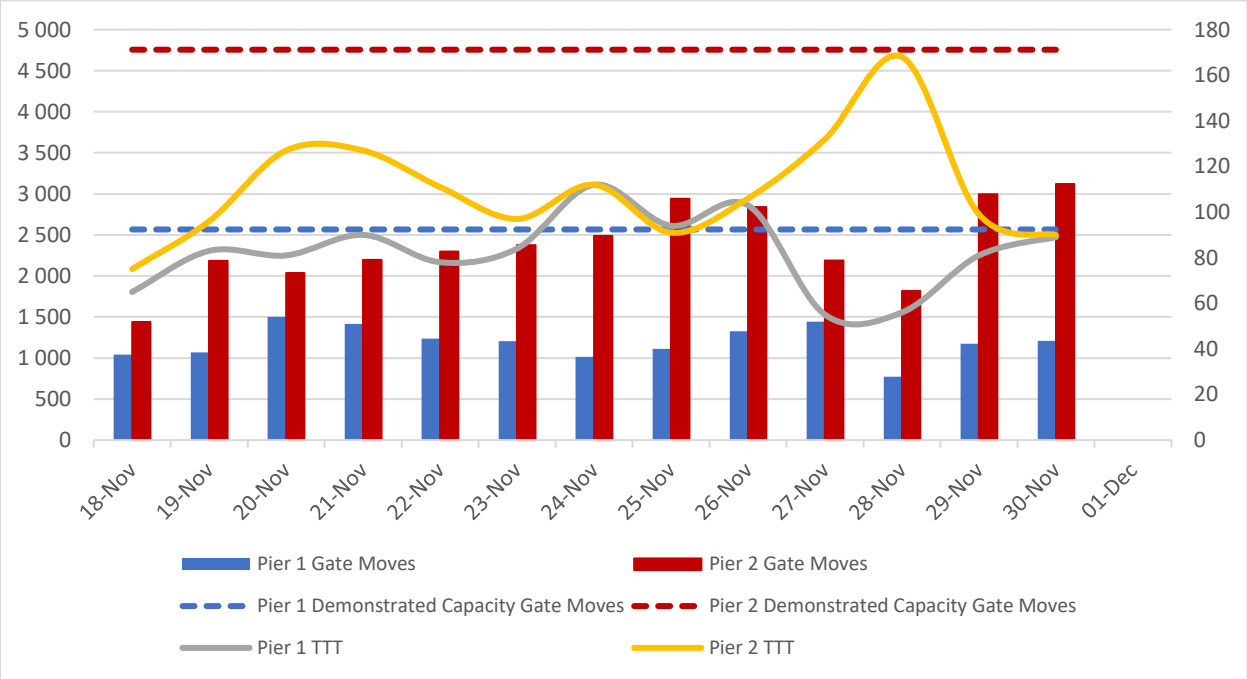
Durban's MPT terminal recorded three vessels at berth on Thursday and one at the outer anchorage. Stack occupancy for containers was 53%, with the breakbulk stack around 47%. In the preceding 24 hours, the terminal handled 487 containers and 1 304 tons of breakbulk on the waterside. On the landside, 232 container trucks and 37 breakbulk RMTs were serviced. During this period, two cranes, eight reach stackers, nine forklifts, and 17 ERFs were in operation. The latest reports suggest that no ETR has been communicated yet for the return of cranes 04 and 06.

On Tuesday, the Maydon Wharf MPT recorded zero vessels at berth or anchor. On the waterside, no volumes were handled across the quay due to no vessels being on the berth. On the landside, 43 trucks containing around 1 513 tons were handled on the waterside in the 24 hours before. The next vessel destined for the Agri-bulk facility is scheduled for arrival on 04 December.

On Thursday, the Ro-Ro terminal in Durban recorded three vessels on the berth, with one vessel at anchorage. In the 24 hours before, the terminal handled 1 895 road and 232 rail units on the landside while handling 1 993 units on the waterside. Overall stack occupancy was 70% (Exports: 38%, Imports: 51%, Transshipments: 11%), 30% at Q&R, and 30% at G-berth. During this period, the terminal had 155 high-and heavies (abnormal loads) on hand and managed to handle 17.

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.

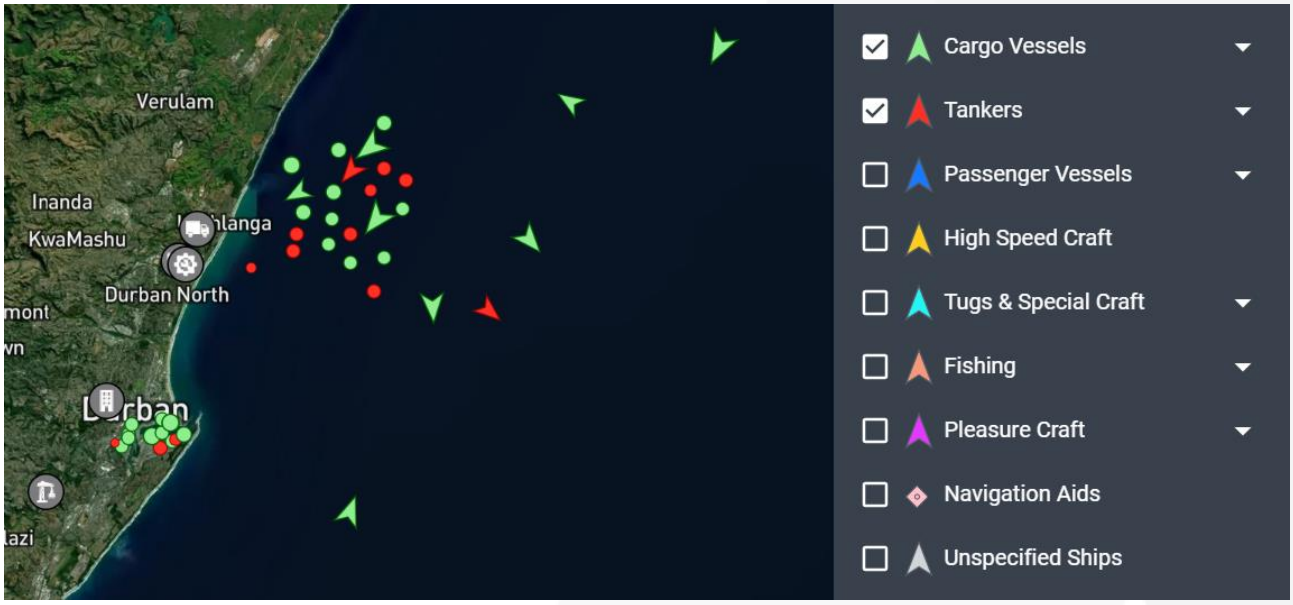
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 01/12/2024.

The queue of container vessels waiting outside Durban has slightly increased in the last few weeks. On Sunday evening, **four** vessels were waiting for Pier 1, **five** for Pier 2, and **three** for Point terminal, with a current estimation of **at least five additional days added to the schedules** (stable from last week).

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 01/12/2024 at 14:00.

iv. Richards Bay

On Thursday, Richards Bay had 19 vessels at anchor and nine on the berth, translating to three vessels at DBT, five at MPT, zero at RBCT, and one at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources. However, towards the end of the week, the pilot boat was out of commission due to a shortage of human resources on the craft. On Wednesday, the coal terminal had one vessel at berth and three at anchor, handling **115 369 tons** on the waterside. The daily average for the week was relatively low at around **119 600 tons** (**↓39%**, w/w). An average of 24 trains were serviced on the landside, above the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded two vessels on berth but zero at anchor, with none drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation 24 hours before. Stack occupancy figures were recorded at 9% for reefers, 34% for reefer ground slots, and 26% for the general stack. During this period, the terminal conceded around 15 operational hours to adverse weather and did not handle any waterside volumes. Approximately 151 trucks were processed on the landside at an undisclosed TTT. Towards the end of the week, the terminal had seven STS cranes, 28 RTGs, and 68 hauliers in service.

On Thursday, GCT had one vessel at berth and none at outer anchorage. Marine resources of one tug, a pilot boat, two pilots, and one berthing gang were in operation in the preceding 24 hours. Despite experiencing weather challenges and conceding around eight hours to an oil spillage, 130 trucks were processed at an undisclosed TTT on the landside, while 188 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 49% for the general stack and 3% for reefers. Additionally, towards the end of the week, the terminal had one STS crane, one mobile harbour crane, and nine straddles available.

During the same period, zero vessels were at berth or at anchor at the Ro-Ro terminal. The terminal received 540 units, resulting in a stack occupancy figure of 38%.

vi. Saldanha Bay

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

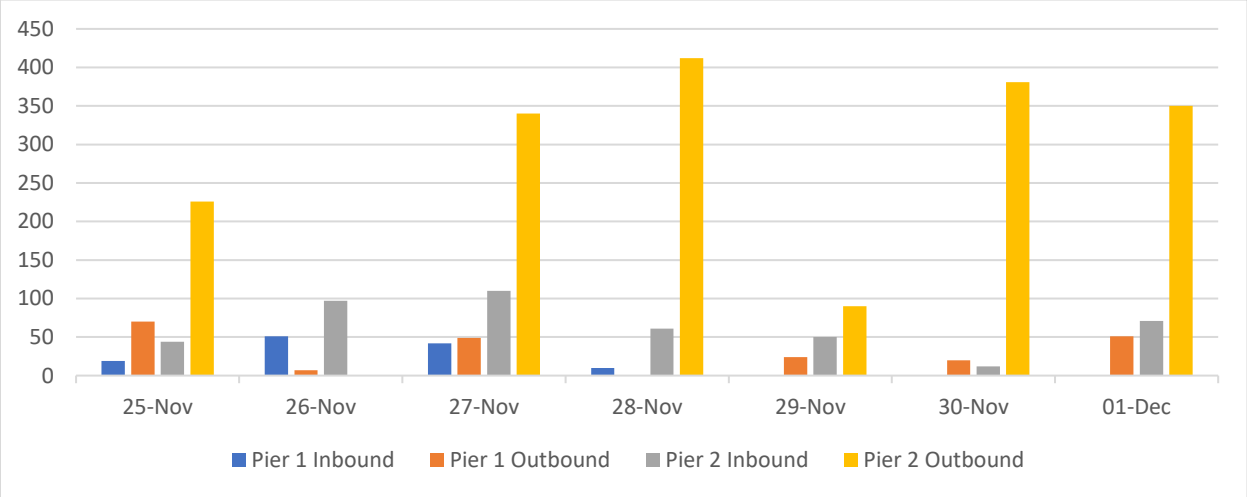
vii. Ports Regulator: Tariff increase

On 27 November, the Ports Regulator of South Africa announced its Record of Decision on the National Port Authority's tariff application for financial 2025/26. An across-the-board increase of **↑4,4%** was authorised. Specific changes to tariffs include a **↑3,4%** increase on cargo dues except dry bulk cargo, which increases by **↑4,0%**. Marine charges are to increase by **↑6,15%**. The Authority's original application was for an across-the-board increase of **↑7,9%**. Various other issues are addressed in the ROD, which is available on the Regulators website.

viii. Transnet Freight Rail (TFR)

The line between Johannesburg and Pretoria was heavily impacted by cable theft over the weekend, which rendered it out of commission for a significant part of the week. Additionally, towards the end of the week, DCT Pier 2 had 221 ConCor units on hand with a dwell time of 96 hours and 162 over-border units with a dwell time of 17 days.

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



Source: Calculated using data from Transnet, 2024. Updated 01/12/2024.

In the last week (*25 November to 1 December*), rail cargo handled out of Durban was reported at **2 587** containers, down by **↓26%** from the previous week's **3 489** containers.

ix. Other updates

The latest reports suggest that the NRCS strike is ongoing (as of 20 November), with the workforce demanding an 8% salary increase. The strike may affect the market surveillance activities, timely processing of LOAs (letters of authority), certifications, and related services provided by NRCS. The contingency plan remains, however, that all NRCS offices will be accessible to those with standing appointments. Additionally, should access not be possible to the Pretoria office, an emergency gate, which is accessible from Leyds Street in Groenkloof, will be opened as and when required. Several managers remain on standby to try and assist as far as possible.

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 18 November. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *November 2023* averaged **~984 921 kg** per day.

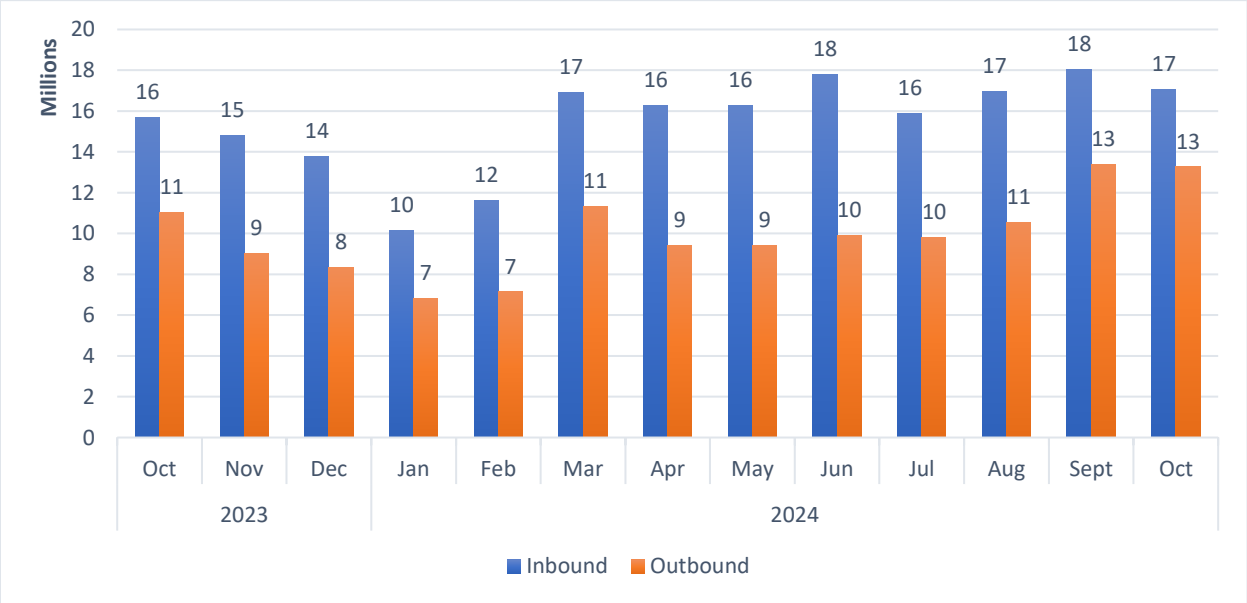
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	18-Nov	19-Nov	20-Nov	21-Nov	22-Nov	23-Nov	24-Nov	Week
Volume inbound	411 650	250 674	454 669	212 289	322 132	227 889	2 322 085	**4 201 388**
Volume outbound	175 052	192 995	273 900	206 287	261 854	211 999	1 897 309	**3 219 396**
Total	**586 702**	**443 669**	**728 569**	**418 576**	**583 986**	**439 888**	**4 219 394**	**7 420 784**

Courtesy of ACOC. Updated: 20/11/2024.

The daily average of air cargo handled at ORTIA in the previous week amounted to **600 198 kg** inbound (**↓12%**, w/w) and **459 917 kg** outbound (**↑7%**), which continues to grow substantially. However, because of the decrease in the inbound cargo, this week's overall numbers have decreased by **↓5%** - but the average numbers remain up on last year (**↑8%** versus November 2023) and a similar increase over pre-pandemic levels (**↑10%** versus November 2019). The following statistics show the continued volume increase since the start of 2023, with the increased outbound cargo evident:

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

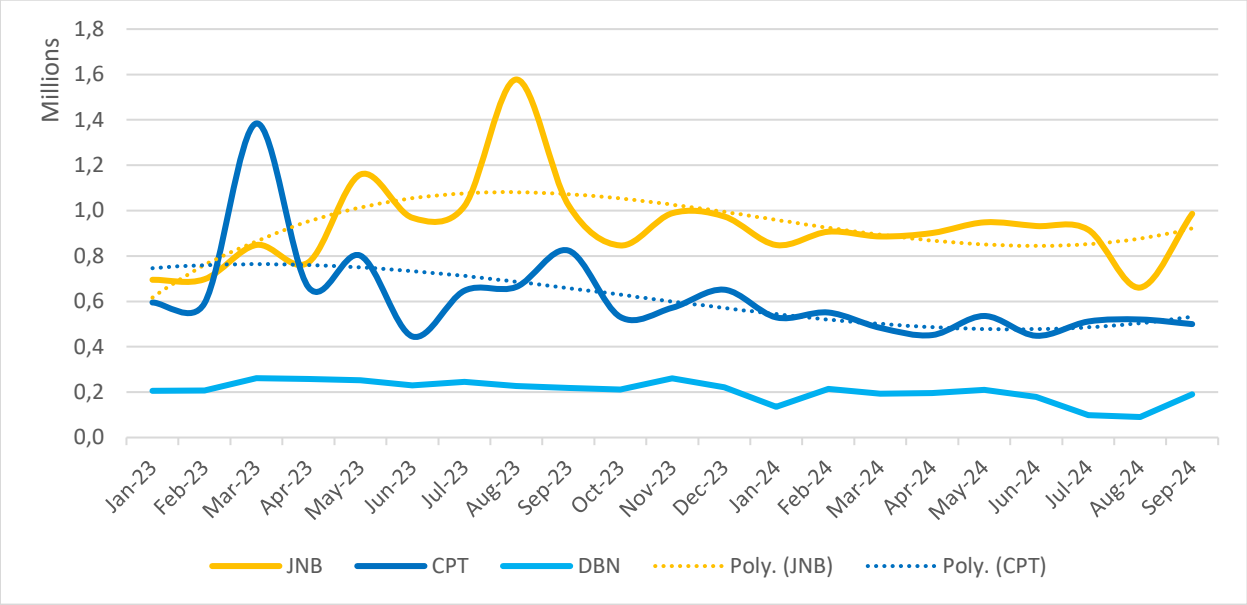


Courtesy of ACOC. Updated: 25/11/2024.

b. Domestic air cargo

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 25/10/2024.

3. SARS Merchandise Trade Statistics: October

SARS released its latest "*Merchandise Trade Statistics*" for October[7], showing a preliminary monthly trade surplus of **R14,6 billion**. Monthly trade indicates that exports increased by **↑5,3%** from September (m/m), while imports increased by **↑4,4%** (m/m). The YTD figures reveal a trade surplus of **R145,5 billion**, a significant improvement from the **R83,4 billion** surplus recorded in 2023. Annually, export flows for October 2024 were **R179,6 billion** and **↑3,3%** (y/y) higher than in October 2023, while import flows were lower by **↓8,3%**, decreasing from **R180,0 billion** to **R165,0 billion** in the current period.

Regionally, trade with BELN countries for October resulted in a trade surplus of **R13,2 billion**, derived from exports of **R19,8 billion** and imports of **R6,5 billion**. Exports to our neighbouring countries increased by **↑16,1%** (m/m) between September and October, while imports rose by **↑8,1%** (m/m) over the same period. Cumulative figures for the year demonstrate a substantial positive trade balance with BELN countries, increasing from **R106,1 billion** in 2023 to a surplus of **R113,8 billion** in 2024. When excluding BELN countries, South Africa's trade balance with all other trading partners is a net surplus **of R31,7 billion** YTD.

[7] SARS. 29/11/2024. Trade Statistics: October 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 about **two hours**, averaging **15,0 hrs** (**↓12%**, w/w) for the week.
- In contrast, the greater SADC region (excluding South African controlled) largely stayed the same – averaging **~5,0 hrs** (**unchanged**, w/w).

1. **Skilpadshek and Kopfontein border posts updates:**
   - Queues measured 5,5 km (Skilpadshek) and 6 km (Kopfontein) last Thursday.
   - Delays caused by new Cargo Clearing Systems in Botswana:
     - Implementing Biometric Identification and Unique Consignment Reference (replacing Consolidated Cargo Code).
     - Clearance time increased from 1 hour to 24+ hours.
   - Resolutions from the Trans Kalahari Corridor Secretariat meeting:
     - Pre-clearance is mandated for all transporters; vehicles without pre-clearance will be turned back.
     - Priority is given to perishables, dangerous goods, and pharmaceuticals.
     - Manual processing to be used if online systems fail for over 30 minutes.
     - Long-term solutions proposed, including **(1)** 24-hour border processing, **(2)** OSBP development, and **(3)** implementation of regional tracking systems.
2. **Port of Maputo and Mozambique border developments:**
   - Border traffic at the Port of Maputo halted last week Friday for about 90 minutes as a precautionary measure.
   - After some disruptions earlier in the week, the Lebombo border post operated normally on Monday, 2 December.
     - N4 (KM4 to the Port): Normal traffic, no protest-related incidents reported in the past 24 hours.
     - Urgent Request: Transporters are urged to expedite truck removals; several trucks at the terminal have not yet requested release. Maximising movement into the port today is critical.

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[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	473	32,7	8,2	33,0	14 190	3 311
Beitbridge	Zimbabwe-SA	473	14,4	2,4	14,3	14 190	3 311
Groblersbrug	SA-Botswana	235	17,1	1,3	17,1	7 050	1 645

[8] Reported delays are uncertain and variable, stemming from multiple distributed causes. They cannot be solely attributed to a single issue due to limited transparency in the border process. Common factors include poor infrastructure, congestion, and lack of coordination among stakeholders. Data is sourced from the Logistics Monitoring System (LMS) by Crickmay and SAAFF. Stakeholders are encouraged to report issues via the UNCTAD/AfCFTA NTB platform or contact FESARTA's TRANSIST Bureau for more reliable information.

[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
Martins Drift	Botswana-SA	206	3,6	1,0	3,4	6 180	1 442
Kopfontein	SA-Botswana	238	13,5	2,1	13,3	7 140	1 666
Tlokweng	Botswana-SA	44	0,7	0,2	0,4	1 320	308
Vioolsdrift	SA-Namibia	30	4,3	1,1	4,1	900	210
Noordoewer	Namibia-SA	20	1,7	0,4	1,4	600	140
Nakop	SA-Namibia	30	5,9	1,0	5,5	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,4	1,1	600	140
Skilpadshek	SA-Botswana	253	26,5	9,6	26,0	7 590	1 771
Pioneer Gate	Botswana-SA	99	1,9	1,2	1,6	2 970	693
Lebombo	SA-Mozambique	1 446	6,4	1,6	6,3	43 380	10 122
Ressano Garcia	Mozambique-SA	125	1,6	0,3	1,3	3 750	875
Sum/Average		**3 692**	**9,4**	**2,2**	**9,2**	**110 760**	**25 844**

Source: TLC, FESARTA, & Crickmay, week ending 24/11/2024.

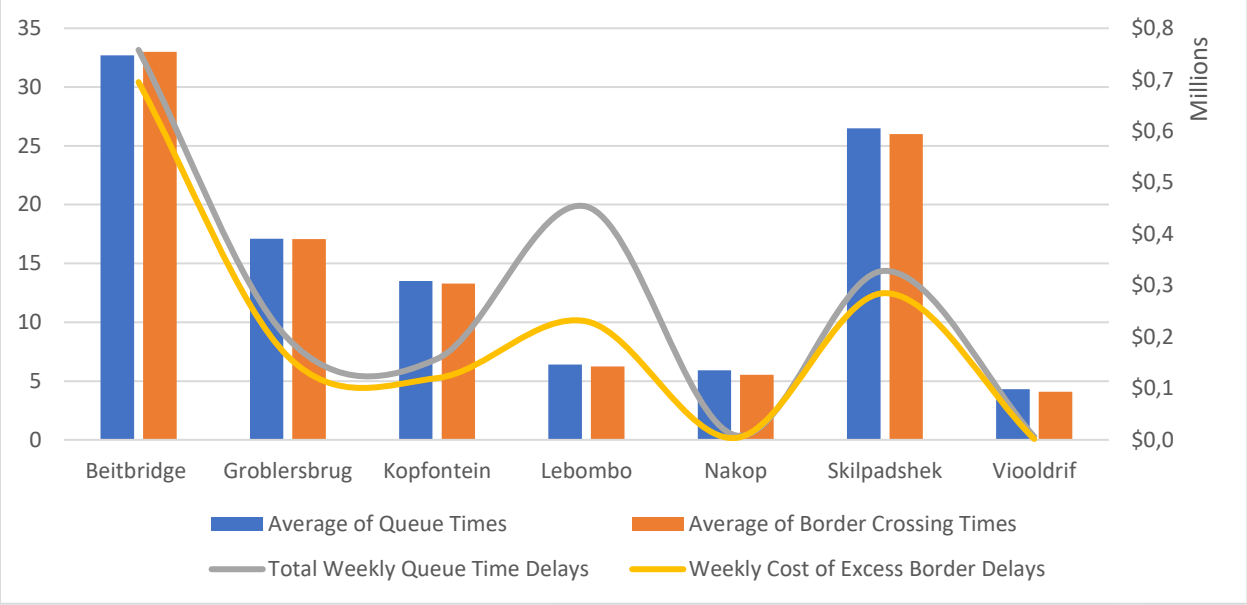
Table 6 – Delays summary – Corridor perspective

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	12,5	3,8	12,3	9 600	2 240
Central Corridor	798	2,3	0,4	0,9	23 940	5 586
Dar Es Salaam Corridor	1 819	10,6	0,9	10,5	54 570	12 733
Maputo Corridor	1 571	4,0	0,9	3,8	47 130	10 997
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 741	10,9	1,5	11,0	112 230	26 187
Northern Corridor	2 817	1,4	0,1	1,4	92 520	21 588
Trans Caprivi Corridor	116	22,8	4,3	22,7	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	382	8,3	2,9	7,9	11 460	2 674
Trans Oranje Corridor	100	3,3	0,7	3,0	3 000	700
Sum/Average	**11 891**	**6,3**	**1,0**	**6,0**	**364 740**	**85 106**

Source: TLC, FESARTA, & Crickmay, week ending 24/11/2024.

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

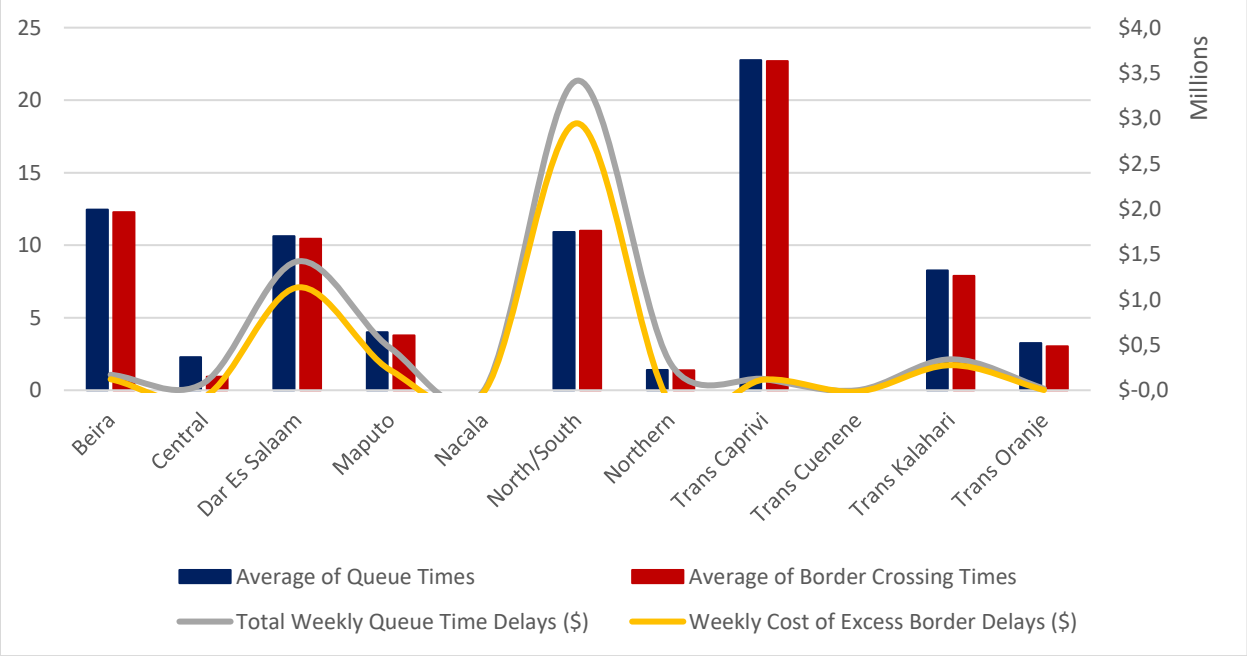
Figure 12 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 24/11/2024.

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 24/11/2024.

In summary, cross-border queue time averaged **~6,3 hours** (up by **~0,3 hours** from the previous week's **~6,0 hours**), indirectly costing the transport industry an estimated **$6,3 million** (**R115 million**). Furthermore, the week's average cross-border transit times hovered around **~6,0 hours** (down by **~0,2 hours** from the **~6,3 hours** recorded in the previous report), at an indirect cost to the transport industry of **$4,6 million** (**R83 million**). As a result, the total indirect cost for the week amounts to an estimated **~$10,9 million** (**R197 million**, up by **~R30 million** or **↑18%** from **~R167 million** in the previous report).

5. International Update

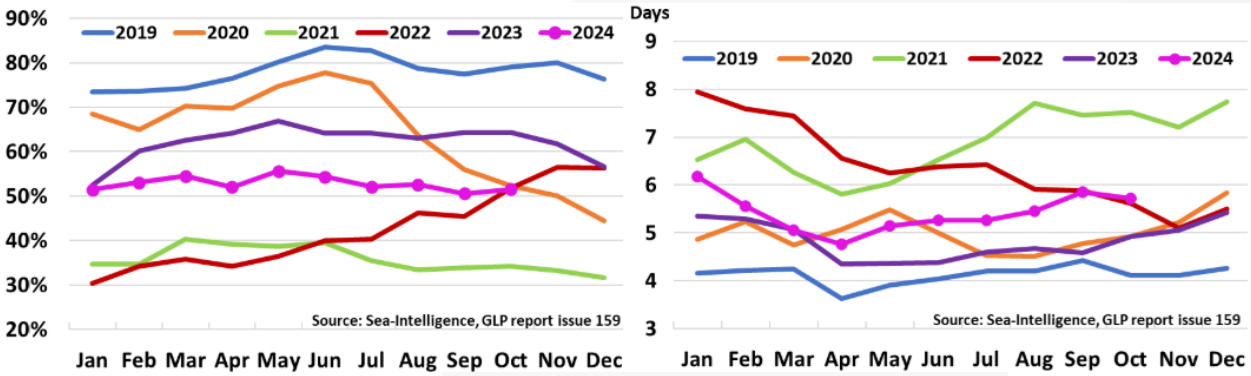
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry and **(b)** the global aviation industry.

a. Global shipping industry

i. Global schedule reliability and container summary

According to Sea-Intelligence's Global Liner Performance (GLP) report, global schedule reliability experienced a marginal improvement in October 2024, increasing by **↑0,9%** (m/m) to **51,5%**. This slight uptick continues the trend of stability observed throughout 2024, with reliability figures consistently ranging between **50% and 55%**. Despite these relatively low percentages, the minimal volatility provides shippers with a consistent expectation on a monthly basis. The average delay for late vessel arrivals decreased by **0,14 days** from the previous month, bringing it to **5,72 days**. This marks the second-highest delay recorded for October, surpassed only by the peak delays during the pandemic in 2021.

Figure 14 – Global Schedule Reliability (%) and Global Average Delays for Late Vessel Arrivals (days)



Source: Sea Intelligence

Among the top 13 carriers, Maersk led with schedule reliability of **57,9%**, followed by MSC at **52,0%**. Most of the remaining carriers fell within the **40%-50% reliability range**, with PIL being the least reliable at **37,2%**. Notably, eight carriers improved their reliability compared to the previous month, with Wan Hai showing the most significant increase of **↑5,4%**. Conversely, ZIM experienced the largest decline, dropping by **↓3,5%**. Year-over-year comparisons reveal that none of the top 13 carriers achieved an increase in schedule reliability, and 12 of them recorded double-digit declines. Scheduling remains volatile, as Drewry's "*Cancelled Sailings Tracker*" registered a high **10% cancellation rate** of pro-forma scheduling (2 December to 5 January).[10]

Elsewhere, port congestion has remained stable in recent weeks and hovers around the **2,4 million TEU mark**, accounting for **7% of the global fleet**.[11] In South Africa, port congestion at the Port of Durban also remained stable this week, as some capacity is waiting to be off-loaded currently outside at anchorage (some **27 475 TEU**). The queue-to-berth ratio at Durban decreased to **0,71** late on Sunday.[12]

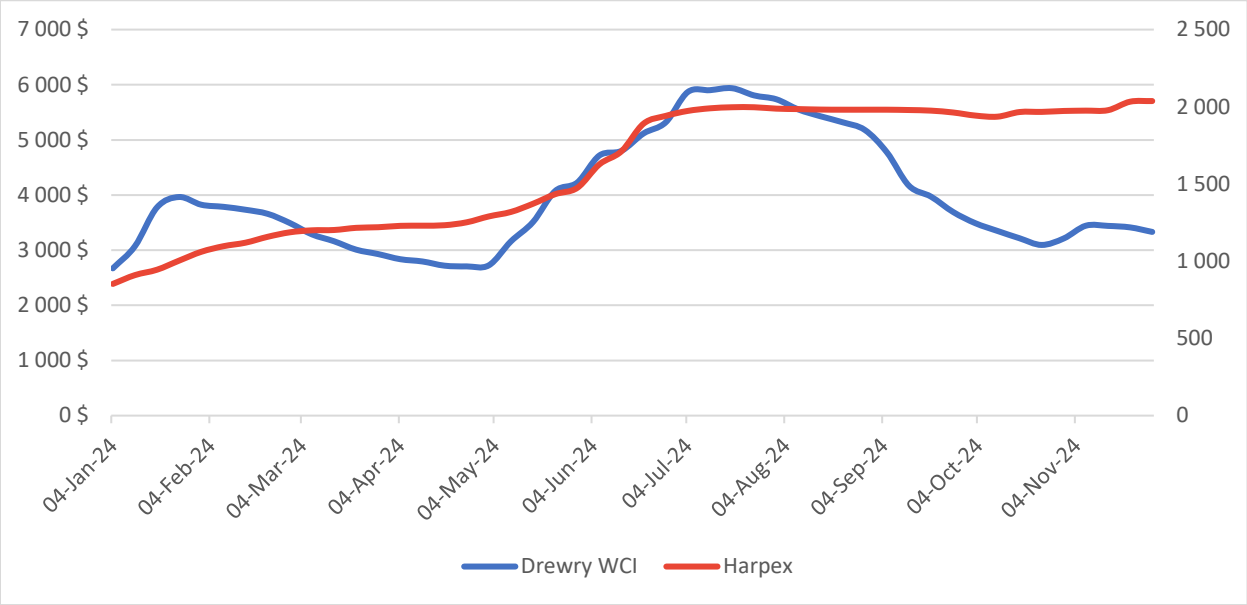
ii. Global container freight and charter rates

After a slight resurgence at the turn of last month, freight rates have again slipped this week. Drewry's "*World Container Index*" decreased by **↓2,4%** (or **$82**), trading at **$3 331 per 40-ft container**.[13] Charter rates

[10] Drewry. 29/11/2024. Cancelled Sailings Tracker.
[11] Linerlytica. 02/12/2024. Market Pulse 2024 Week 48.
[12] Linerlytica. 01/12/2024. Port Congestion Watch.
[13] Drewry. 28/11/2024. World Container Index.

have not followed suit, as the *Harper Petersen Index* (Harpex) remains elevated and traded around **2 037 points** (**↑0,2%,** w/w) on Friday. The following illustration shows the continued divide between the two:

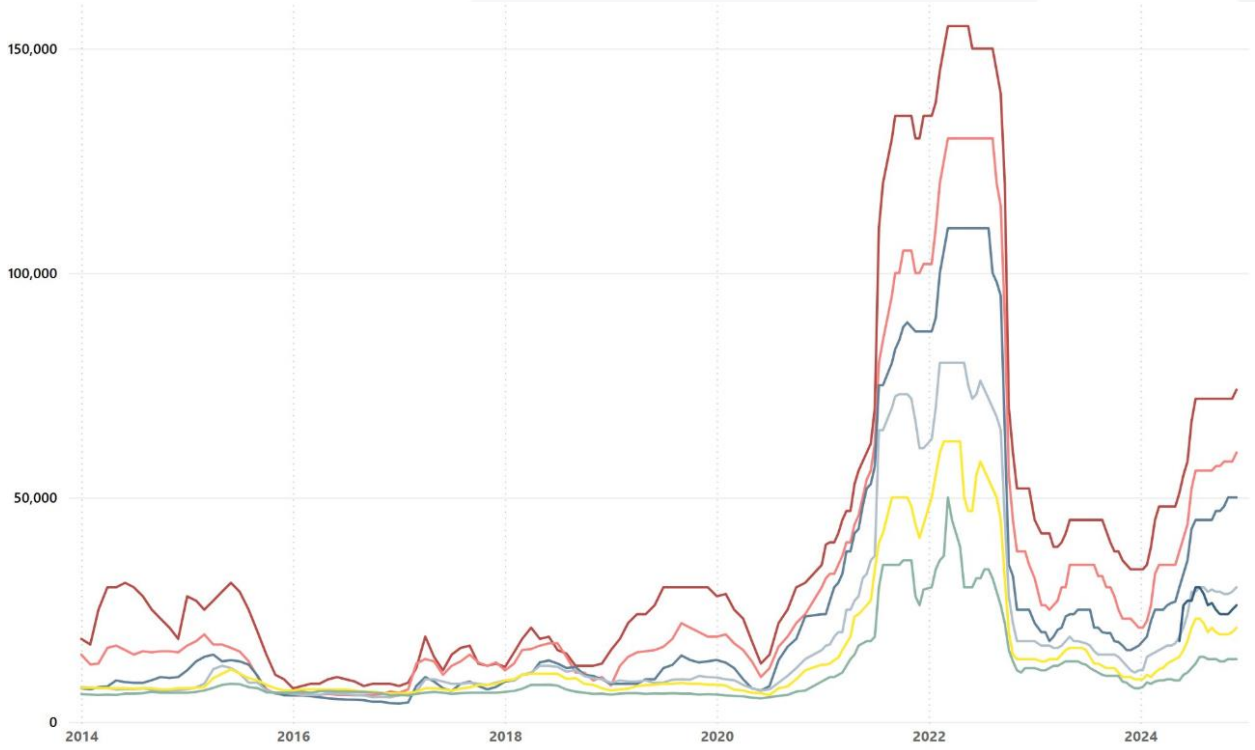
Figure 15 – World Container Index and Charter rates (YTD, $ per 40ft, index)



Source: Calculated from Drewry and Harpex

Diving a bit deeper into the changes, Alphaliner this week investigated the changes per market segment:

Figure 16 – Charter rates per vessel segment ($ per day)



Source: Alphaliner

The container charter market surged in the past fortnight after a slower period, driven by strong demand for tonnage across all vessel sizes. MSC led with forward deals for **8-10 000 TEU vessels**, extending deliveries to 2027, setting a bold trend. Forward fixing has expanded to smaller, energy-efficient ships under **3 000 TEU**, with contracts now extending as far as Q2 or Q3 2025. This shift reflects carriers' confidence in market prospects and their focus on securing high-quality charters.

b. Global air cargo industry

Global air cargo rates continued to rise steadily in late November, with tonnages holding at prior-week levels and the average global rate climbing **↑2%** to **$2,79 per kilogram**, the highest in 2024. Spot rates drove this increase, notably from North America (**↑12%**, w/w to **$2,04**) and Europe (**↑8%**, w/w to **$2,90**). Global spot rates grew **↑4%** to **$3,21**, while contract rates dipped slightly (**↓1%**, w/w to **$2,65**). Year-on-year (YoY), global average rates are up **↑10%**, with spot rates surging **↑22%** and contract rates **↑8%**:

Figure 17 – Capacity, weight, and rates by region (last 2 to 5 weeks, y/y % change)

Origin Regions last 2 to 5 weeks (WORLD ACD)	Capacity[1]			Chargeable weight[1]			Rate[1]		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-1%	-4%		+1%	-1%		+0%	+12%
Asia Pacific		-0%	+5%		+4%	+11%		-0%	+10%
C. & S. America		+2%	+4%		+4%	+9%		+3%	+4%
Europe		-0%	-1%		+2%	+3%		+6%	+6%
M. East & S. Asia		+1%	+0%		+1%	+10%		-1%	+48%
North America		+4%	+3%		+3%	+15%		+1%	-1%
Worldwide		**+1%**	**+2%**		**+3%**	**+9%**		**+2%**	**+10%**

Source: World ACD

Regional dynamics show stable rates in Asia Pacific and Middle East and Asia but notable annual increases (**↑8%** and **↑46%**, respectively). North America showed exceptional year-on-year growth in chargeable weight (**↑22%**), driven by Thanksgiving's shifted timing. Capacity shifts influenced rate trends, with Transatlantic freighter capacity declining (**↓10%**, y/y) while Asia Pacific-North America capacity grew (**↑7%**, y/y). Forwarders' pre-peak season capacity arrangements dampened rate volatility typical of ex-Asia Pacific trade lanes.

ENDS[14]

[14]**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.*

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Procedure

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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.

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