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Cargo Movement Update #225[1]

Date: 16 March 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)	30 144	34 343	**64 487**	38 569	43 940	**82 509**	↓22%
Air Cargo (tons)	4 399	2 704	**7 103**	3 860	2 573	**6 433**	↑10%

Monthly Snapshot

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

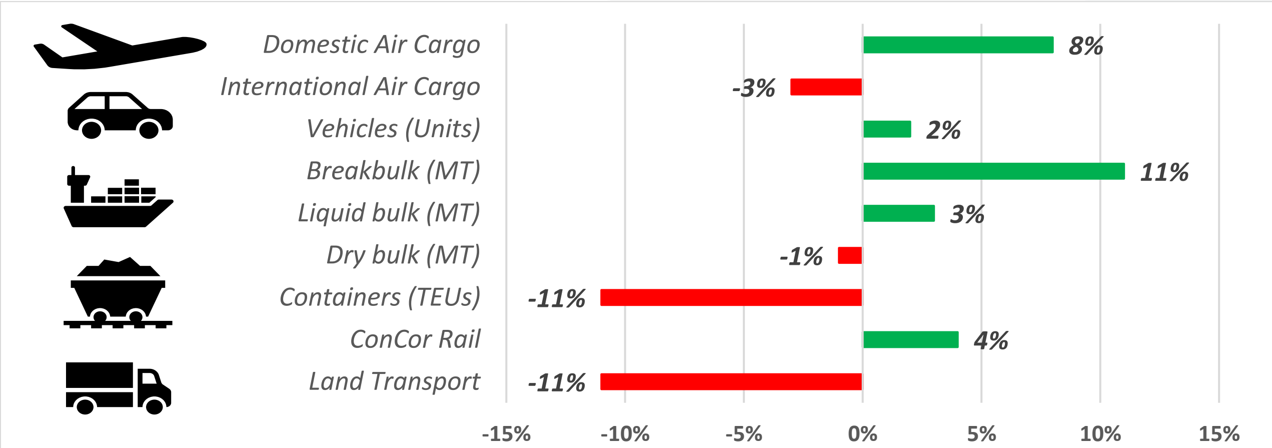
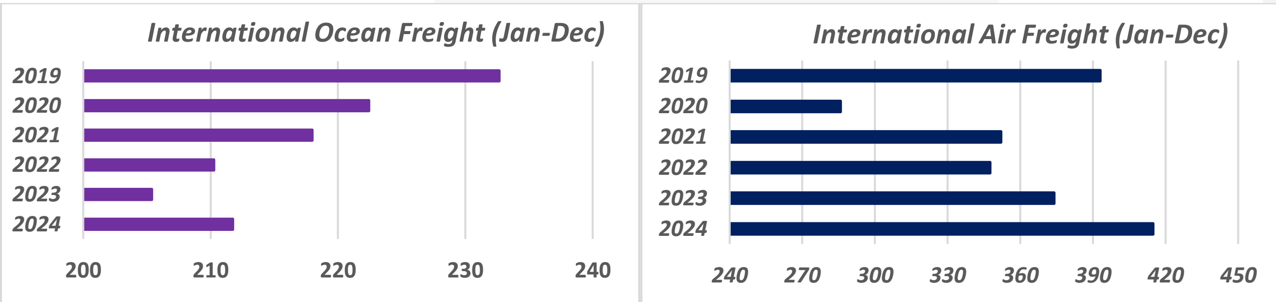


Figure 2 – Year-to-date flows 2019-2024[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~9 212 TEUs** was handled per day, with **~11 381 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 806** containers, up **↑8%** from last week.
- Truck volumes through Lebombo increased to **1 516 HGVs/day** (**↑8%**), with average crossing times **5,1 hrs**.
- Cross-border queue: **↑1,2 hrs**; transit: **↑0,8 hrs**; SA borders: **8,2 hrs** (**↓25%**); SADC: **4,4 hrs** (**on change**).
- In January, global container volumes reached **15,4 million TEU**, marking a **↑5,8%** year-on-year increase.
- Global spot rates dropped another **↓6,8%** (or **$173**) and now trade at around **$2 368 per 40-ft container.**
- Global air cargo tonnages in week 10 (3–9 March) are up **↑2%** year-on-year (y/y), as rates are **$2,33/kg**.

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[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *225th* 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: Feb vs Feb.
[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, a decreased average of **9 212 TEUs** was handled per day, significantly down from **11 787 TEUs** last week. Port operations were mainly characterised by inclement weather, vacant berths, equipment breakdowns and shortages. The Port of Cape Town conceded more than 35 operational hours this week due to strong winds, adverse weather conditions and equipment breakdowns that disrupted operations in Durban. Vacant berths and inclement weather conditions resulted in operations delays at our Eastern Cape ports. At the same time, the main operational constraints at the Port of Richards Bay proved to be adverse weather. The latest reports from Maersk suggest that the Maersk Iyo will omit the Port of Cape Town due to the continuation of adverse weather conditions at the port. Also, the Santa Cruz faced a technical issue with her main engine en route to London Gateway from Cape Town. Furthermore, the main operational challenge on the rail network this week was the floods in and around Durban. The extent of the difficulties, however, remains undisclosed.

The global maritime sector has seen significant developments in the last week, notably MSC's aggressive expansion, solidifying its position as the world's top-ranked global terminal operator (GTO). Though regulatory scrutiny persists, MSC's acquisition of Hutchison Ports will boost its market access, increasing its global terminal capacity to 15%. Additionally, ultra-large container vessels have been deployed to West Africa's Lome port, marking a regional milestone. Container demand remains robust, with a **↑5,8%** year-on-year rise in January and an **↑8,1%** increase in TEU*Miles. However, capacity utilisation on key routes has dipped below 90%, leading to mixed rate trends. Meanwhile, due to high costs, US shipbuilding revival efforts are unlikely to gain traction. Freight rates continue to slide, whereas charter rates remain elevated, widening the charter-to-freight-rate gap to a record **289%**.

International air cargo to and from ORTIA (handling approximately **87% of the total international volumes**) registered another healthy increase this week. The daily average of air cargo in the previous week amounted to **628 476 kg** inbound (**↑14%**, w/w) and **386 267 kg** outbound (**↑5%**). The current trends indicate that volumes are about **↑13%** (y/y) above the average levels of 2024 and a significant **↑30%** above the same pre-pandemic levels of 2020 (**↑19%**). Domestically, South Africa's aviation sector faces considerable challenges due to critical skills shortages, equipment failures, and outdated Air Traffic and Navigation Services (ATNS) procedures, leading to extensive flight delays and cancellations. Transport Minister Barbara Creecy has acknowledged these issues and initiated an urgent action plan to address them, aiming to prevent a catastrophic breakdown in aviation safety.[6] Internationally, worldwide air cargo markets show a flat trend looking at the latest demand and pricing levels, slightly above last year, according to the most recent weekly figures, amid a fast-evolving geopolitical and trade environment.

Cargo flows across the Lebombo Border Post and N4 Corridor have increased again this week, with truck volumes at **1 516 HGVs per day** (**↑8%**, w/w). There was almost no queue to the border, as the average processing time hovered around **5,1 hours** per crossing. Rail to Maputo increased to an average of **seven trains a day** in the last week, as sugar trains from Eswatini also increased – to around **two trains a day**.

For the rest of SADC borders, the average queue times increased by around **an hour** from last week, as the transit times increased by slightly more than **half an hour**. The median border crossing times at South African borders decreased by **two and a half hours**, averaging **~8,2 hrs** (**↓25%**) for the week. In contrast, the greater

[6] Panchia, Y. 18/03/2025. Aviation crisis: urgent action needed as South Africa's air traffic system breaks down.

SADC region (excluding South African controlled) was relatively the same, averaging **~4,4 hrs** (**on change**). On average, three SADC borders took more than a day to cross last week, including Beitbridge, Chirundu OSBP, and Kasumbalesa (the worst affected, averaging around **a day** from the **DRC side** and **two days** from the **Zambia side**). Other developments include **(1)** Groblersbrug closed to April at least, **(2)** smuggling concerns at Beitbridge, **(3)** the pre-clearance requirement for Skilpadshek, **(4)** Chirundu truck attacks and **(5)** increased police presence in the DRC.

In summarising this week's report, the weekly throughput numbers – the lowest recorded for quite some time – and the relatively low collective numbers posted for February- have dampened some optimism lately, notably the new equipment received in Durban. Nevertheless, the continued drive for restructuring, including steps toward greater collaborations and inclusivity across the public, private, and labour industries and operational enhancements, signal progress in the right direction. Some calls have been on the need for a port network statement (similar to rail), which could clarify private sector involvement, ensure regulatory certainty, and establish a structured path toward efficiency improvements. More joint ventures and collaborative initiatives will be essential to unlocking investment, accelerating port modernisation, and ultimately achieving the sector's long-term performance targets.

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 10 to 16 March (measured in TEUs)

7-day flow reported (10/03/2025 – 16/03/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 341	30 386	↑14%
New Pier (Pier 1)	1 811	12 680	↑3%
Cape Town Container Terminal	1 057	7 401	↓59%
Ngqura Container Terminal	970	6 789	↓58%
Port Elizabeth Container Terminal	105	738	↓72%
Other	928	6 493	↓2%
Total	**9 212**	**64 487**	**↓22%**

Source: Calculated from TPT, 2025. Updated 16/03/2025.

A decreased average of **~9 212 TEUs** (**↓22%**) was handled per day for the last week (*10 to 16 March, Table 2*), significantly below the projected average of **~11 381 TEUs** (**↓19%** actual versus projected).

For the coming week, the expected throughput is the same. An increased average of **~11 381 TEUs** (**↑24%**) is predicted to be handled (*17 to 23 March, Table 3*). Port operations were mainly characterised by inclement weather, vacant berths, equipment breakdowns, and shortages.

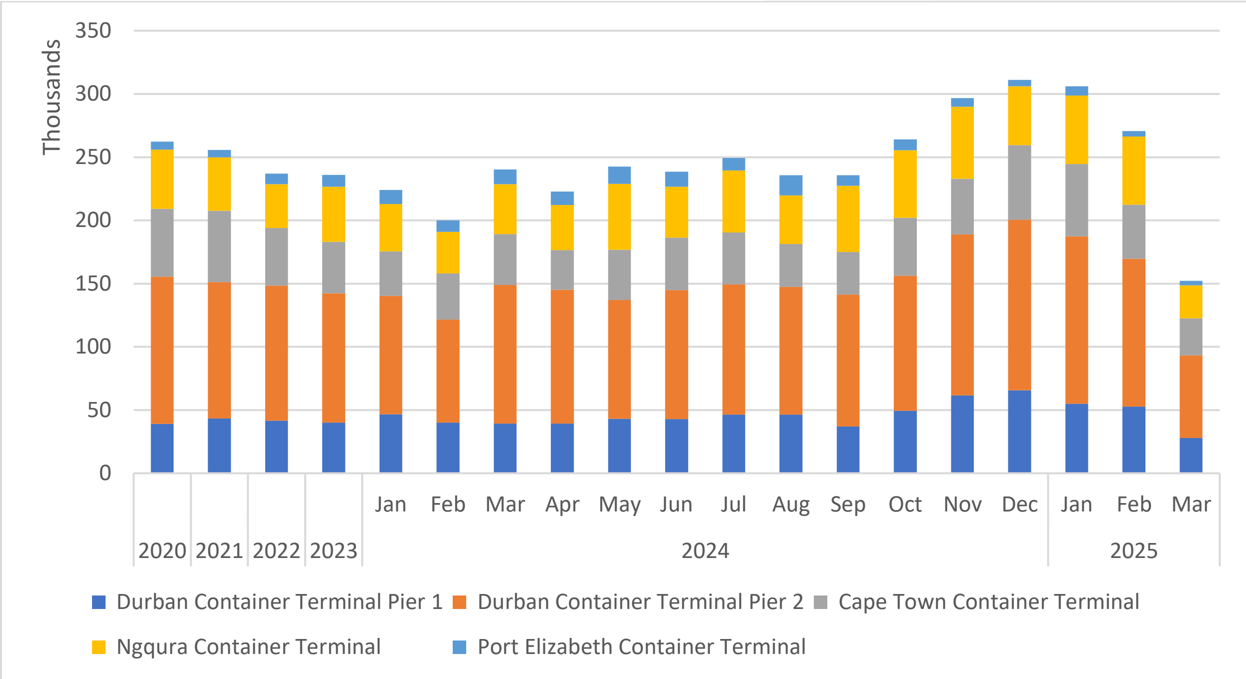
Table 3 – Container Ports – Weekly flow projected for 17 to 23 March (measured in TEUs)

7-day flow reported (17/03/2025 – 23/03/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 440	31 078	↑2%
New Pier (Pier 1)	1 641	11 490	↓9%
Cape Town Container Terminal	2 113	14 793	↑100%
Ngqura Container Terminal	1 989	13 922	↑105%
Port Elizabeth Container Terminal	272	1 907	↑158%
Other	925	6 474	↓17%
Total	**11 381**	**79 665**	**↑24%**

Source: Calculated from TPT, 2025. Updated 16/03/2025.

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 16/03/2025.

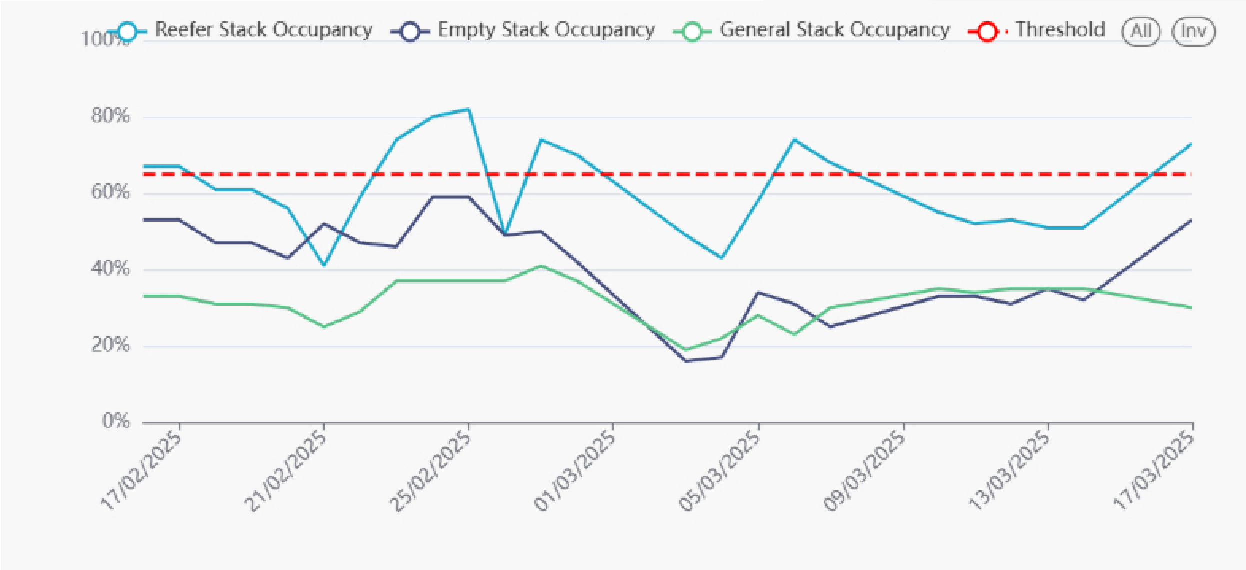
The following figure shows daily stack occupancy in both Durban terminals over the last five weeks.

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

Source: Calculated using data from Transnet, 2025, and updated 16/03/2025.

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 (17 February to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 16/03/2025.

b. TNPA: February update

TNPA has released consolidated port statistics for February[7], with varying monthly performance and yearly performance across the respective sub-sectors:

- Containers increased monthly by ↑**6%** (m/m) but decreased annually by ↓**11%** (y/y).
- Total bulk cargo decreased monthly by ↓**2%** (m/m), roughly the same as last year.
- Vehicles increased monthly by ↑**18%** (m/m) and annually by ↑**2%** (y/y).

The following table shows the respective changes versus January:

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

	Jan	Feb	Movement	%, m/m
Containers (TEUs)	**335 403**	**356 612**	**21 209**	**6%**
Landed	184 502	174 443	-10 059	-5%
Shipped	150 901	182 169	31 268	21%
Dry bulk (MT)	14 732 388	14 742 838	10 450	0%
Liquid bulk (MT)	3 446 354	3 164 286	-282 068	-8%
Breakbulk (MT)	535 458	481 814	-53 644	-10%
Vehicles (Units)	53 161	62 871	9 710	18%
Total cargo (excl. Vehicles)	**18 714 200**	**18 388 938**	**-325 262**	**-2%**

Source: TNPA, updated 13/03/2025.

Transnet Port Terminals handled **356 thousand containers** and **18,4 million metric tonnes** of bulk cargo during February. The following table shows the comparative overview for February versus last year, including the view versus the same month in the pre-pandemic year of 2019:

[7] Transnet. 2025. Port statistics.

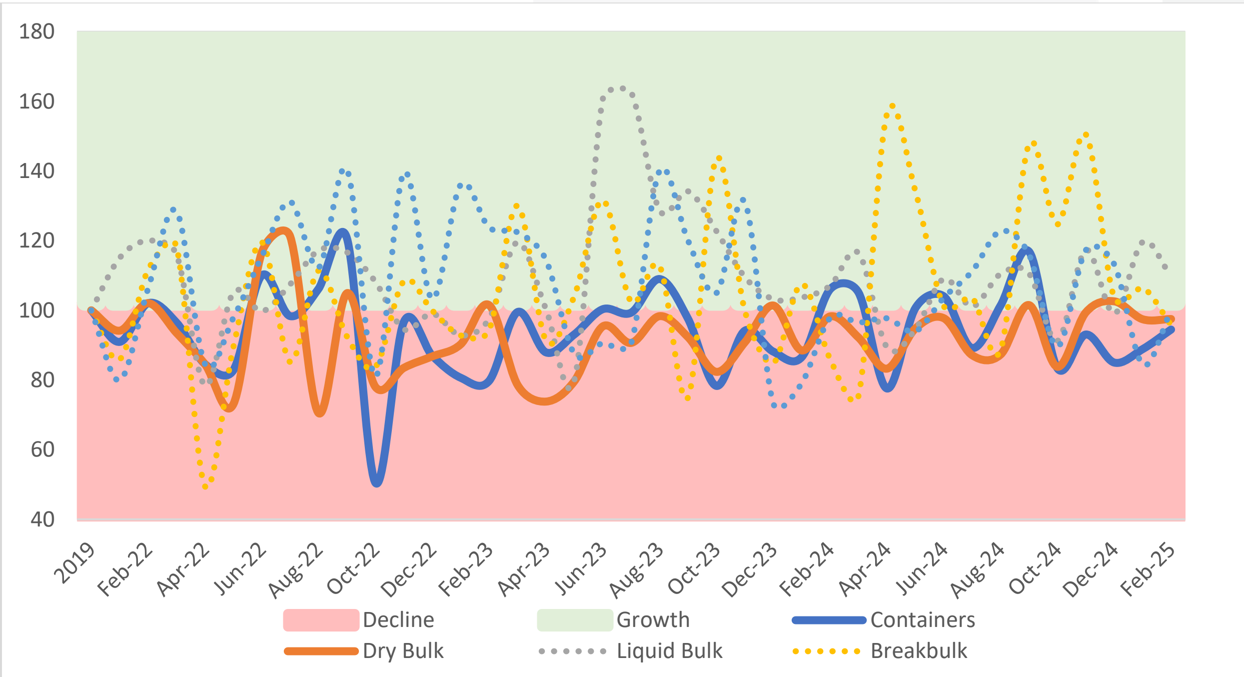
Table 5 – TNPA – Cyclical volume and growth: February 2020, 2024, and 2025

	2019	2023	2024	Growth: '20-'25	Growth: '24-'25
Containers (TEUs)	**394 719**	**400 207**	**356 612**	**-10%**	**-11%**
Landed	188 856	190 975	174 443	-8%	-9%
Shipped	205 863	209 232	182 169	-12%	-13%
Dry bulk (MT)	15 043 392	14 856 440	14 742 838	-2%	-1%
Liquid bulk (MT)	4 118 155	3 084 282	3 164 286	-23%	3%
Breakbulk (MT)	325 649	432 625	481 814	48%	11%
Vehicles (Units)	60 795	61 534	62 871	3%	2%
Total cargo (excl. Vehicles)	**19 487 196**	**18 373 347**	**18 388 938**	**-6%**	**0%**

Source: TNPA, updated 13/03/2025.

Since right before the pandemic, our cargo volumes through our ports for February have not grown. Indeed, if we use 2019 as an average baseline, we can realise that our main two sectors – containers (linked to manufacturing, retail, and consumption) and dry bulk (linked to mining and export markets) – have not grown:

Figure 6 – Port throughput per sector, indexed (average 2019 = 100)



Source: TNPA, updated 13/03/2025.

The persistent stagnation of South Africa's key port sectors—containers and bulk cargo—reveals structural weaknesses in the national logistics infrastructure and underscores broader economic stagnation. Container throughput, which strongly correlates with manufacturing and retail activity, remains notably below pre-pandemic levels (approximately **↓6,9%** since 2019), reflecting ongoing constraints in domestic demand and supply chain inefficiencies. Similarly, dry bulk volumes, indicative of mining and export strength, have declined marginally but consistently, suggesting subdued global demand and domestic operational challenges. These figures highlight a critical need for continued targeted port and logistics management interventions to restore competitiveness and stimulate economic recovery. The logistics reform remains a necessary evolution in South Africa's trade, transport, and logistics industry.

c. Summary of port operations

i. Weather and other delays

- Cape Town conceded more than 35 operational hours last week due to strong winds.
- Adverse weather conditions and equipment breakdowns disrupted operations in Durban.
- Vacant berths and inclement weather conditions ensured operations delays at our Eastern Cape ports.
- The main operational constraints at the Port of Richards Bay proved to be adverse weather.

ii. Cape Town

On Friday, CTCT recorded three vessels at berth and four at anchor, as adverse weather conditions proved to be the primary operational constraint. As of Tuesday morning (18 March), the Port of Cape Town had a queue-to-berth ratio of **1,00**, according to Linerlytica's "*Port Congestion Watch*".[8] On the landside, between Monday and Friday, the terminal managed to service at least 1 289 trucks while handling approximately 172 rail units. On the waterside, the terminal executed approximately 3 217 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 35%**, **reefers at 51%**, and **empties at 32%**. Additionally, the terminal operated with **nine STS cranes**, **24 RTGs**, and **64 hauliers** towards the end of the week. However, the terminal conceded more than 50 operational hours this week to strong winds.

The latest reports from Maersk suggest that the Maersk Iyo will omit the Port of Cape Town due to the continuation of adverse weather conditions there. Waiting times at the port currently range between 8 and 10 days, resulting in the vessel being advanced to the Port of Coega.

Additionally, this week, Maersk announced that the Santa Cruz vessel faced a technical issue with its main engine en route from Cape Town to London Gateway. Subsequently, the vessel drifted to a safe location at sea, where she successfully underwent the necessary repairs. The expectation is that her original schedule will be delayed by about two days.

On Thursday, CTMPT recorded two vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 207 container moves across the quay on the waterside despite being windbound for more than eight hours. On the landside, 166 trucks were processed during the same period. Stack occupancy was recorded at 41% for general cargo, 18% for reefers, and 23% for empties. Towards the end of the week, the terminal operated with three cranes and four straddle carriers.

Between 3 and 9 March, the FPT terminal handled nine vessels: two multi-cargo, four dry bulk, and three container vessels. Berth occupancy during this period was recorded at 78%. The terminal planned to handle eight more vessels between 10 and 16 March, with another five vessels scheduled between 17 and 23 March. The late arrival of cargo, equipment breakdowns, and adverse weather conditions ensured operational constraints during this period.

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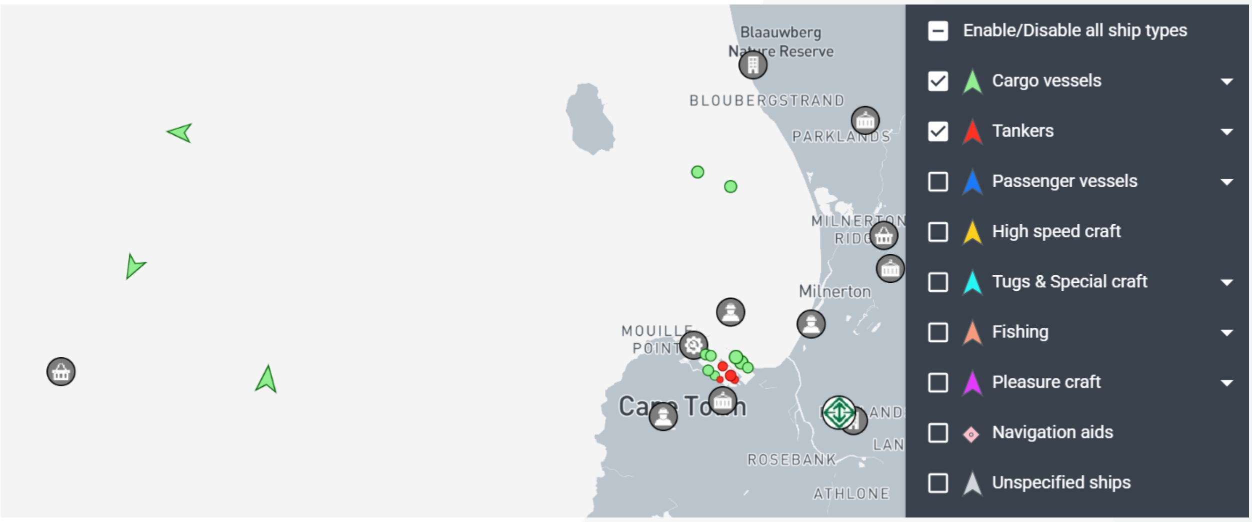
[8] Linerlytica. 02/03/2025. Port Congestion Watch.

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



Source: Marine Traffic. Updated 17/03/2025 at 14:00.

iii. Durban

On Friday, Pier 1 recorded one vessel on berth, operated by five gangs, with zero vessels at anchor. Stack occupancy was **55%** for **GP containers**. Between Monday and Friday, the terminal executed approximately 5 256 gate moves and 217 rail moves on the landside. The **average TTT** for the week was **~91 minutes** (**↑2%**, w/w) and an average **staging time** of **~59 minutes** (**↓22%**). Additionally, the terminal moved over 3 800 TEUs across the quay on the waterside during the same period. The terminal operated with **five STS cranes** and **11 RTGs** towards the end of the week.

Pier 2 had four vessels on berth and three at anchorage on Friday, as adverse weather conditions and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **50%** for **GP containers**. The terminal operated with **ten gangs** and moved over 12 400 containers across the quay between Monday and Friday on the waterside. Approximately 9 425 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~74 minutes** (**↓12%**, w/w) and another low staging time of **~60 minutes** (**↓8%**). Indeed, landside operations at DCT have seen a marked improvement recently with the increase in available straddle carriers. Truck Turnaround Times have recently been within the **KPI range of 95 minutes**. Approximately 2 038 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **50** and **59** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **62%** during this period.

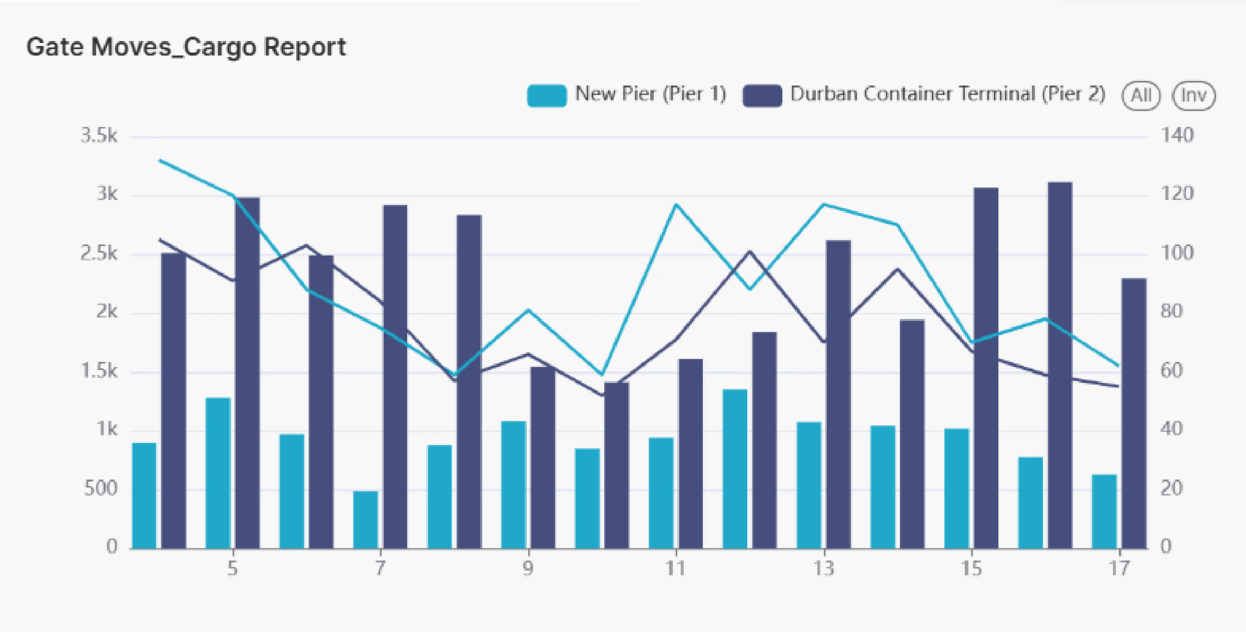
Durban's MPT terminal recorded two vessels at berth on Friday and zero at outer anchorage. Stack occupancy for containers was 25%, with the breakbulk stack around 45%. In the preceding 24 hours, the terminal handled 417 containers and 1 180 tons of breakbulk on the waterside. On the landside, 318 container trucks and 12 breakbulk RMTs were serviced. During this period, three cranes, seven reach stackers, seven forklifts, and 14 ERFs were in operation. The latest reports suggest that the fourth crane should return to service around the end of July.

On Thursday, the Maydon Wharf MPT recorded two vessels at berth and one at anchor. On the waterside, 1 131 tons were handled across the quay in the 24 hours leading to Friday. Six trucks were handled on the landside during the same period, containing approximately 215 tons. During the same period, the agri-bulk facility had one berthed vessel but zero vessels at anchor. The terminal subsequently managed to handle 9 154 tons on the waterside but did not handle any volumes on the landside.

On Friday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with none at anchorage. In the 24 hours before, the terminal handled 1 484 road and 352 rail units on the landside while handling 1 004 units on the waterside. Overall stack occupancy was 75%, 60% at Q&R, and 70% at G-berth. During this period, the terminal had 119 high-and-heavies (abnormal loads) on hand and managed to handle 33.

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.

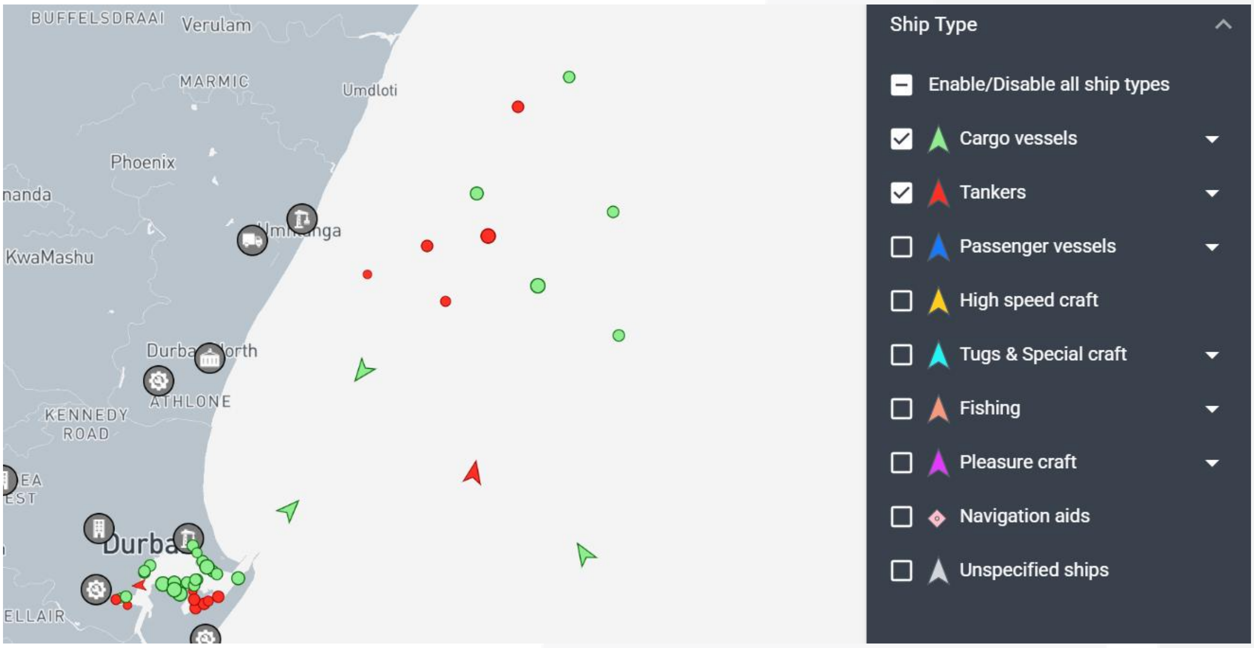
Figure 8 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 16/03/2025.

The queue of container vessels waiting outside Durban remains relatively low. On Monday evening (17 March), **zero** container vessels were waiting for Pier 1, **two** for Pier 2, and **two** 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 17/03/2025 at 14:00.

iv. Richards Bay

On Friday, Richards Bay had ten vessels at anchor and eight on the berth, translating to three vessels at DBT, three at MPT, two at RBCT, and none at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources towards the end of the week. Adverse weather conditions ensured some operational delays towards the end of the week. The daily average for the week increased again to around **175 500 tons** (**↑4%**, w/w). An average of **23 trains** (up by three from last week) were serviced on the landside and above the target of 22.

v. Eastern Cape ports

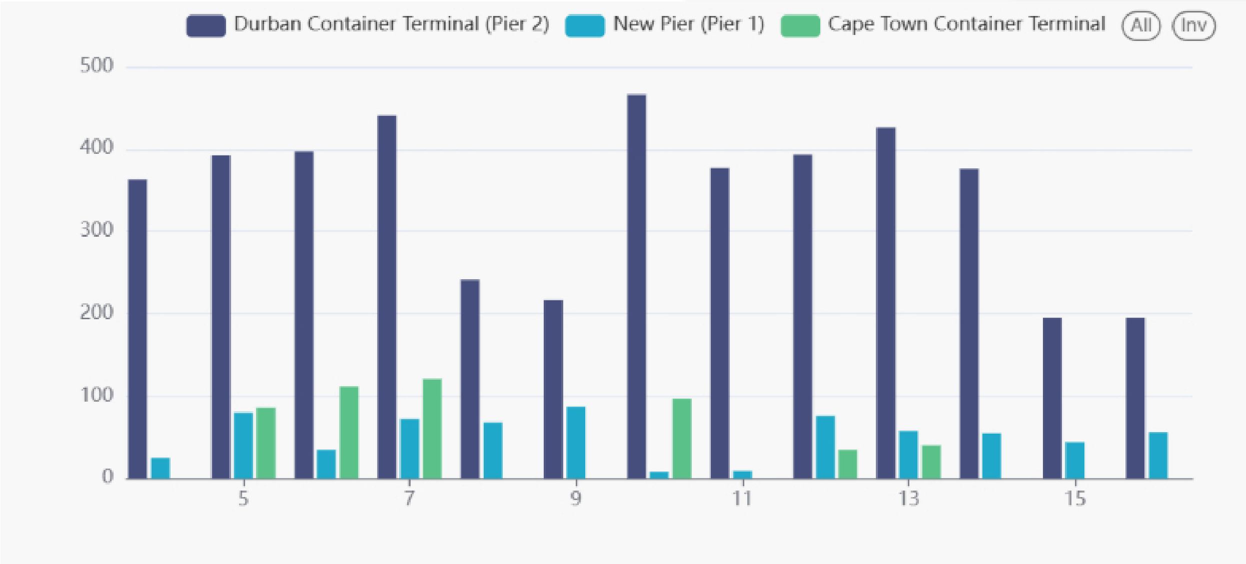
On Wednesday, NCT recorded zero vessels on berth and zero at anchor, with none drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. Stack occupancy figures were recorded at 16% for reefers, 30% for reefer ground slots, and 9% for the general stack. Despite having vacant berths during this period, the terminal handled over 1 300 TEUs and 89 reefers on the waterside. Approximately 699 trucks were processed on the landside at a TTT of ~32 minutes. Additionally, one train was serviced at a rail turnaround time of four hours. Towards the end of the week, the terminal had four STS cranes, 22 RTGs, and 26 hauliers in service.

On Thursday, GCT had zero vessels at berth and none 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, 32 trucks were processed at a TTT of ~11 minutes on the landside, while 738 TEUs and 60 reefers were handled across the quay on the waterside. Stack occupancy was recorded at 5% for the general stack, 26% for reefers, and 7% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and ten straddle carriers in service.

vi. Transnet Freight Rail (TFR)

This week's main operational challenge on the rail network was the floods in and around Durban. The extent of the challenges, however, remains undisclosed. Furthermore, towards the end of the week, DCT Pier 2 had 146 ConCor units on hand with a dwell time of 48 hours and 358 over-border units with a dwell time of 58 days.

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



Source: Calculated using data from Transnet, 2024. Updated 16/03/2025.

In the last week (*10 to 16 March*), rail cargo out of Durban was reported at **2 806** containers, up ↑**8%** from the previous week's **2 607** containers.

vii. TPT tariffs

Transnet Port Terminals have published the updated tariffs from 2025/26, which is available here:

https://www.transnetportterminals.net/Customer/Tariffs/TPT%20Tariff%20Book%202025.pdf

In summary, for containers, the following fees will apply:

Table 6 – TNPA Container tariffs – 2025/26 (ZAR)

	Imports	Exports
6m / 20' containers	1 879,72	413,38
12m / 40', 13,7m/45' containers	3 759,42	826,76
Empty containers of all sizes	77,18	77,18

Source: TNPA

viii. General Updates

Due to the adverse weather expected in Cape Town this week, several vessels may be impacted. According to Maersk, these vessels include the Santa Isabel, which is scheduled to sail to Europe on the morning of 15 March. Due to severe congestion in Europe, there is an expected delay of 2-3 days back to South Africa. The ONE Responsibility is expected to sail from Port Elizabeth on 16 March and is on track to reach London on 31 March and return on time to South Africa. The Santa Clara is expected to berth in Cape Town on 17 March and is on track to reach London on 7 April and return on time to South Africa. The ONE Resolution is expected to berth in Cape Town on 21 March. She is on track to reach London on 14 April and return on time to South Africa.

Earlier this week, Maersk reported on the phasing out of the MSC Jessenia. After that, Maersk announced that the Durban and Cape Town exports on MSC Jessenia R 512N would be moved to the MSC Ariana III. Due to MSC Ariana III Port Elizabeth's omission, the Port Elizabeth exports planned for the MSC Jessenia R 512N will be transferred to the Filotimo 514N.

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 3 March. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *March 2024* averaged **~895 184 kg** daily.

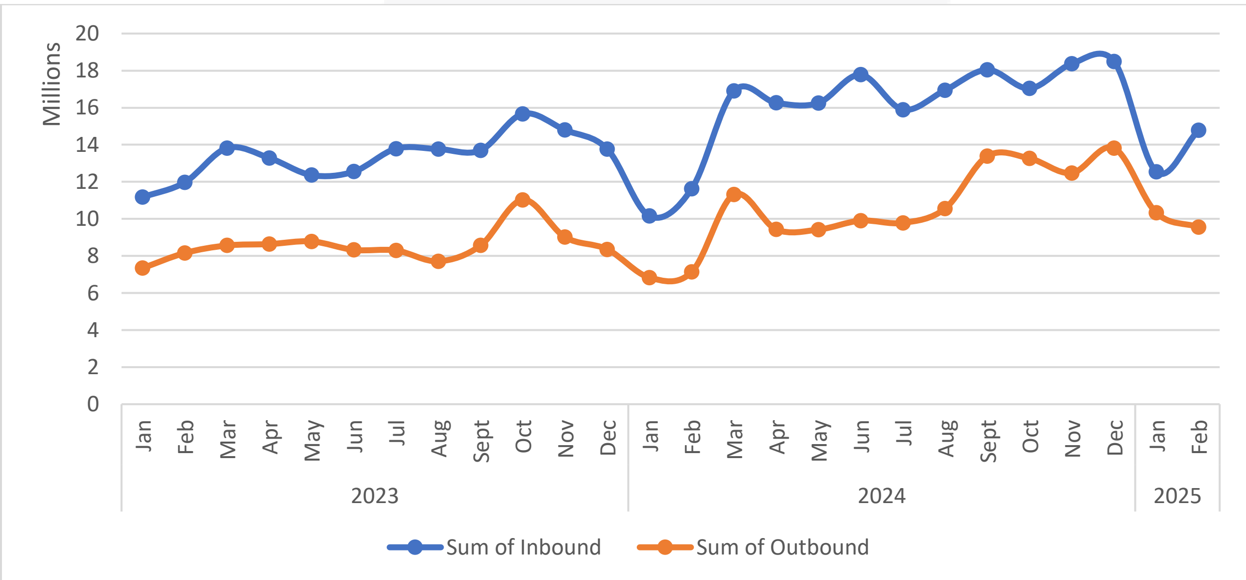
Table 7 – International inbound and outbound cargo from OR Tambo

Flows	03-Mar	04-Mar	05-Mar	06-Mar	07-Mar	08-Mar	09-Mar	Week
Volume inbound	459 590	235 121	375 852	266 658	246 409	410 638	2 405 061	**4 399 329**
Volume outbound	161 520	172 901	171 137	196 595	189 196	234 055	1 578 468	**2 703 872**
Total	**621 110**	**408 022**	**546 989**	**463 253**	**435 605**	**644 693**	**3 983 529**	**7 103 201**

Courtesy of ACOC. Updated: 16/03/2025.

In the air cargo space, the daily average of air cargo handled at ORTIA in the previous week amounted to **628 476 kg** inbound (**↑14%**, w/w) and **386 267 kg** outbound (**↑5%**). The current trends indicate that volumes are about **↑13%** (y/y) above the average levels of 2024 and a significant **↑30%** above the same pre-pandemic levels of 2020 (**↑19%**). February was another excellent month, as cargo was **↑6%** above January and **↑30%** above last year's levels. The following figure shows the air cargo flows to and from ORTIA since the start of 2023:

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

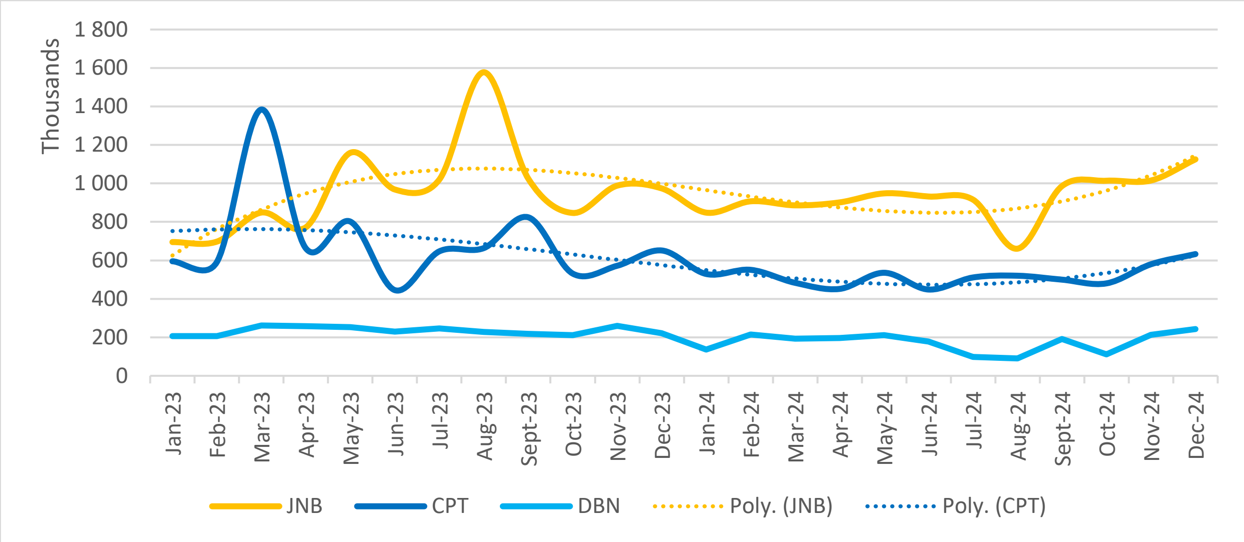


Calculated from ACOC. Updated: 16/03/2025.

b. Domestic air cargo

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

Figure 12 – Domestic inbound and outbound cargo (thousands)

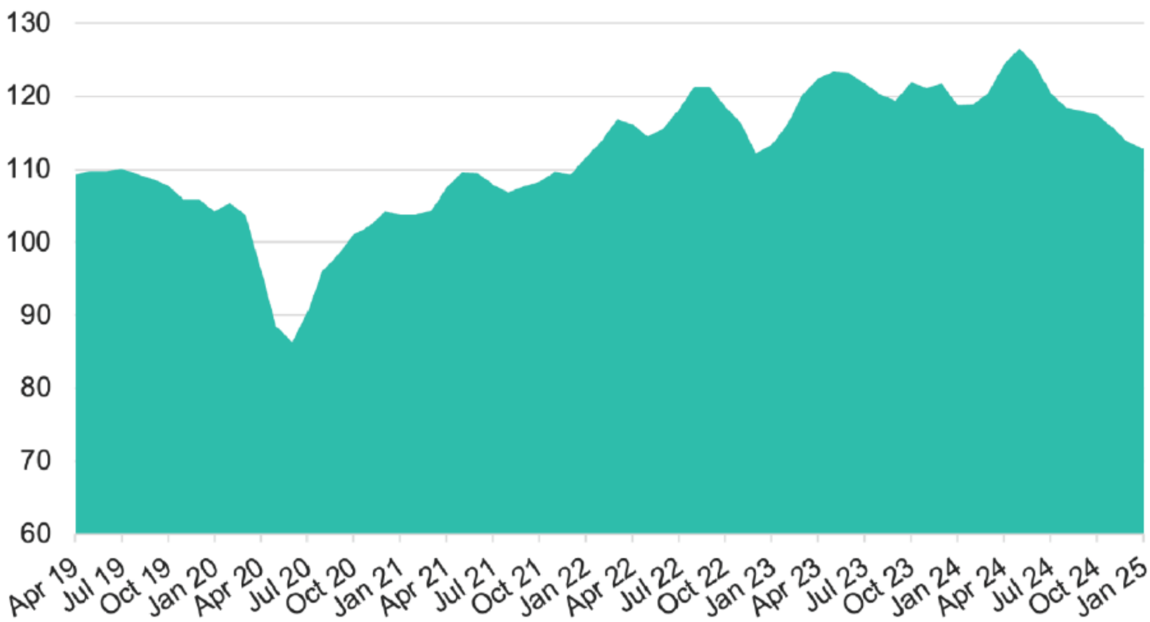


Courtesy of ACOC. Updated: 16/03/2025.

3. National Update

Last week, the Ctrack Transport and Freight Index for Q1 was released. The headline figure shows an ongoing decline in South Africa's logistics sector—with rail fortunately trending in the right direction. The index fell for the eighth consecutive month, reaching **112,8** in January 2025—the lowest level since December 2022. This marks a **↓5%** year-on-year contraction and a **↓10%** drop from May 2024, reflecting broad-based weakness across the sector.

Figure 13 – Ctrack Transport and Freight Index (2016 = 100)



Source: Ctrack

Road freight, which constitutes **83,1%** of total freight payload, contracted by **↓8%** in 2024 due to port inefficiencies and cargo redirections. In contrast, air freight was the strongest performer, growing by **↑10%**, while rail freight continued its slow recovery. Sea freight rose by **↑3%**, supported by recent infrastructure investments.

With the transport sector dragging on GDP, structural reforms—such as port modernisation and rail revitalisation—are crucial for long-term recovery. However, meaningful improvements will take time and require sustained private-sector involvement and investment.

4. Road and Regional Update

a. Lebombo border post update

As of the week spanning 10 to 16 March, cargo flows relatively unabated across the N4 corridor, with only minor issues reported. The following notes summarise the recent developments:

- Truck volumes increased slightly this week at **1 516 HGVs per day** (**↑8%**, w/w), with almost no queue and an average border time of around **5,1 hours** per crossing.
- Rail to Maputo increased to an average of **seven trains a day**.
- Sugar trains from Eswatini have increased to around **two trains a day**.

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

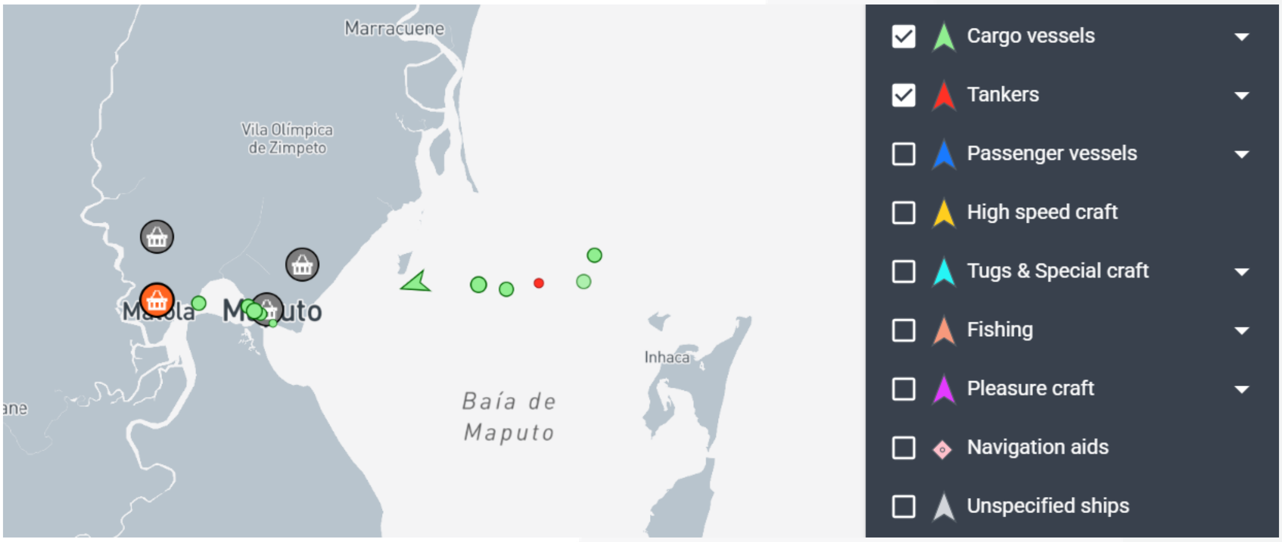
Table 8 – Lebombo border post update

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**	No delays	**2 000**	**20**	**10**	**6**	**4**
10-Mar-25	1 463	1 491	1 275	130	18	65	3		242	**11**	8	2	1
11-Mar-25	1 419	1 356	1 068	168	32	56	31		222	**7**	5	*	2
12-Mar-25	1 700	1 445	1 065	233	57	46	44		249	**11**	8	0	3
13-Mar-25	1 304	1 310	853	283	58	66	50		163	**7**	5	1	1
14-Mar-25	1 563	1 475	1 012	249	55	88	71		164	**11**	8	1	2
15-Mar-25	1 607	1 585	1 190	250	36	63	**46**		253	**2**	*	2	*
16-Mar-25	1 553	1 469	1 187	158	27	45	52		278	**0**	*	*	*
% of design capacity	**101%**	**96%**	**91%**	**105%**	n/a	**123%**	**85%**	n/a	14%	35%	68%	20%	45%
% change (d/d)	-3%	-7%	0%	-37%	-25%	-29%	13%	n/a	-35%	-36%	-38%	n/a	-67%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 16/03/2025.
** = not reported*

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

Figure 14 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 17/03/2025 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 average queue times increased by around **an hour** from last week, as the transit times increased by slightly more than **half an hour**.
- The median border crossing times at South African borders decreased by **two and a half hours**, averaging **~8,2 hrs** (**↓25%**) for the week.
- In contrast, the greater SADC region (excluding South African controlled) was relatively the same, averaging **~4,4 hrs** (**on change**).

1. **Groblersbrug Border Post:**
   - Water levels have dropped but remain higher than in January, causing significant damage to resources and furniture.
   - An inspection was done on Thursday, but the border will unlikely reopen before April.
2. **Smuggling Concerns at Beitbridge:**
   - Informal traders are approaching truck drivers to smuggle goods across the border, with Mannatrade Truck Stop being a key collection point.
   - Previously, buses were the primary target, but truckers are now under increased scrutiny by Zimbabwe's Anti-Smuggling Unit, particularly near Masvingo.
   - Transporters are unaware of these activities, yet their trucks risk long-term impoundment if caught.
3. **Pre-Clearance at Skilpadshek:**
   - As per a Trans Kalahari Corridor Secretariat directive from 1 December, all vehicles heading to the border must be pre-cleared; otherwise, they will be turned back.
   - Additionally, reports emerged on 4 March of stone-throwing incidents leading to road closures between Zeerust and Skilpadshek.
4. **Truck Attacks on the Chirundu Escarpment (Zambia):**
   - A series of attacks on trucks in the area has been reported.
   - However, on 5 March, authorities apprehended the individual responsible, and two patrol vehicles were deployed to enhance security.

5. **Increased Police Presence in the DRC:**
   - Following discussions between FESARTA and DRC government officials, there is now a significant police presence between Lubumbashi and Kasumbalesa.
   - Drivers are being stopped and asked to report any wrongdoing.

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

Table 9 – Delays[9] summary – South African borders (both directions)

Border Post	Direction	HGV[10] 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	459	26,8	6,6	27,0	13 770	3 213
Beitbridge	Zimbabwe-SA	404	11,3	1,3	11,2	12 120	2 828
Groblersbrug	SA-Botswana	0	0,0	0,0	0,0	0	0
Martins Drift	Botswana-SA	0	0,0	0,0	0,0	0	0
Kopfontein	SA-Botswana	282	11,6	1,2	11,4	8 460	1 974
Tlokweng	Botswana-SA	133	1,1	0,3	1,1	3 990	931
Vioolsdrift	SA-Namibia	20	1,3	0,4	1,2	600	140
Noordoewer	Namibia-SA	20	1,4	0,4	1,3	600	140
Nakop	SA-Namibia	30	4,1	1,0	4,2	900	210
Ariamsvlei	Namibia-SA	20	1,3	0,4	1,2	600	140
Skilpadshek	SA-Botswana	256	18,4	1,4	6,3	7 680	1 792
Pioneer Gate	Botswana-SA	93	0,0	0,0	0,0	2 790	651
Lebombo	SA-Mozambique	1 403	5,2	1,1	5,1	42 090	9 821
Ressano Garcia	Mozambique-SA	1 253	1,6	0,2	1,4	37 590	8 771
Sum/Average		**4 383**	**6,2**	**1,1**	**5,2**	**131 490**	**30 681**

Source: TLC, FESARTA, & Crickmay, week ending 09/03/2025.

Table 10 – 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	12,0	2,8	11,8	9 600	2 240
Central Corridor	798	3,7	0,2	3,7	23 940	5 586
Dar Es Salaam Corridor	1 819	14,5	1,3	14,4	54 570	12 733
Maputo Corridor	2 656	3,4	0,6	3,3	79 680	18 592
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 350	10,2	1,2	10,2	100 500	23 450
Northern Corridor	2 817	1,3	0,1	1,3	92 520	21 588
Trans Caprivi Corridor	116	20,3	4,3	10,1	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700

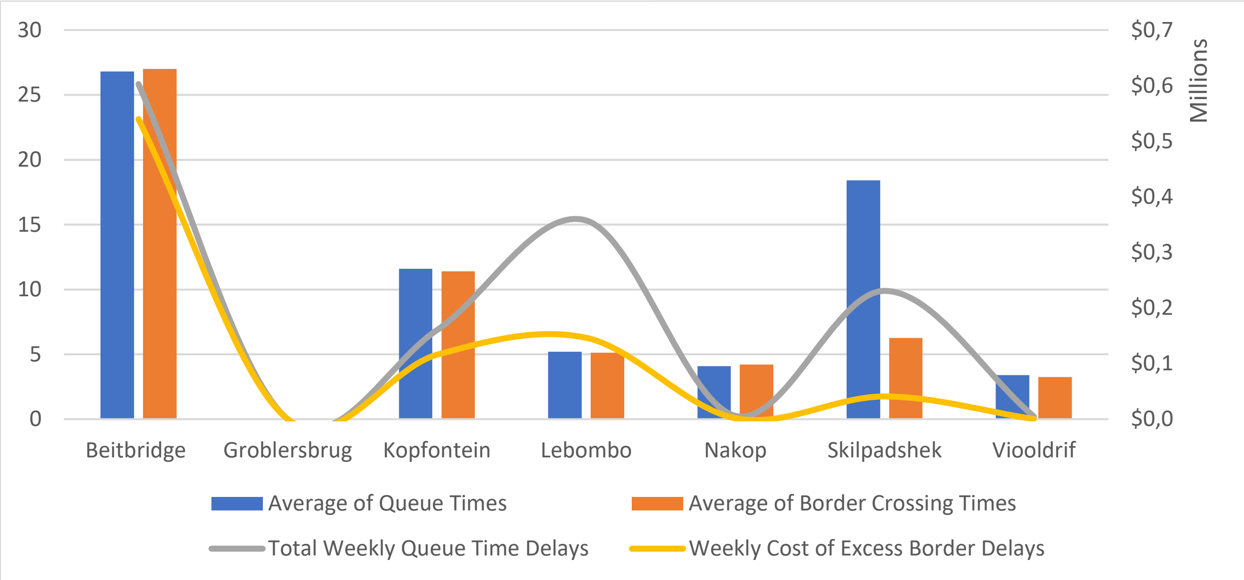
[9] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[10] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Trans Kalahari Corridor	379	5,8	0,6	2,6	11 370	2 653
Trans Oranje Corridor	100	2,6	0,8	2,5	3 000	700
Sum/Average	**12 582**	**6,3**	**0,8**	**5,8**	**385 470**	**89 943**

Source: TLC, FESARTA, & Crickmay, week ending 09/03/2025.

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

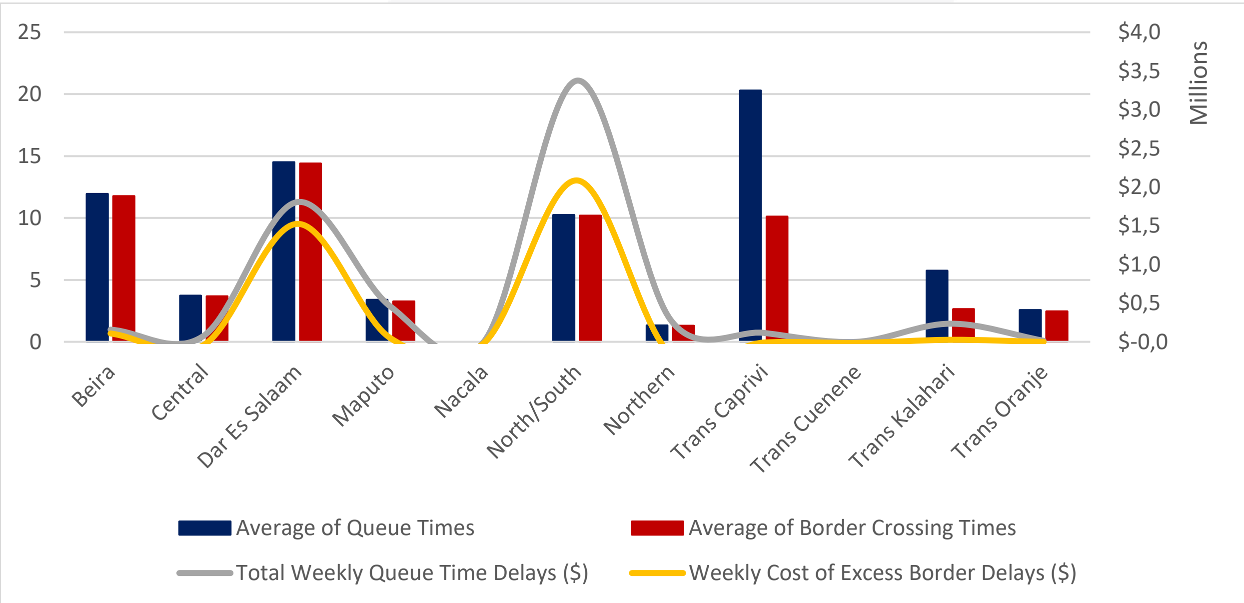
Figure 15 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 09/03/2025.

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

Figure 16 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 09/03/2025.

In summary, cross-border queue time averaged **~6,3 hours** (up by **~1,2 hours** from the previous week's **~5,1 hours**), indirectly costing the transport industry an estimated **$6,5 million** (**R119 million**). Furthermore, the week's average cross-border transit times hovered around **~5,8 hours** (up by **~0,8 hours** from the **~5,1 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,6 million** (**R65 million**). As a result, the total indirect cost for the week amounts to an estimated **~$10,1 million** (**R184 million**, up by **~R23 million** or **↑13,9%** from **~R161 million** in the previous report).

5. International Update

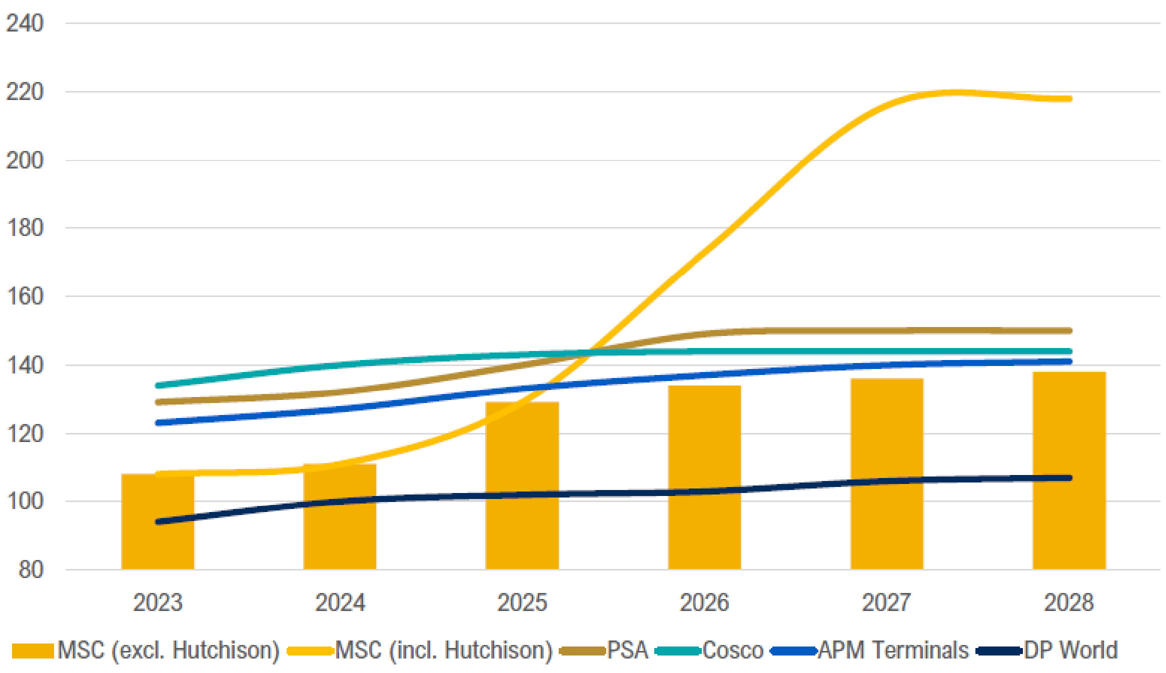
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry and **(b)** the global aviation industry.

a. Global shipping industry

i. Ports and terminals development

In a recent Drewry "*Ports and Terminals*" webinar, the discussion centred around MSC's recent expansion. MSC has been the fastest-growing global terminal operator (GTO), driven by its acquisition of AGL. It continues aggressive expansion, securing terminal investments worldwide. Key developments include the takeover of operations at Walvis Bay, a joint venture for a new terminal in Haiphong, and a memorandum of understanding for Vadhavan. MSC also acquired the IPM terminal in Altamira and formed joint ventures for projects in Patimbam and Nador West Med. The following figure indicates the respective global change with the acquisition of Hutchinson ports and without:

Figure 17 – Capacity outlook for top-ranked GTOs (million TEU)



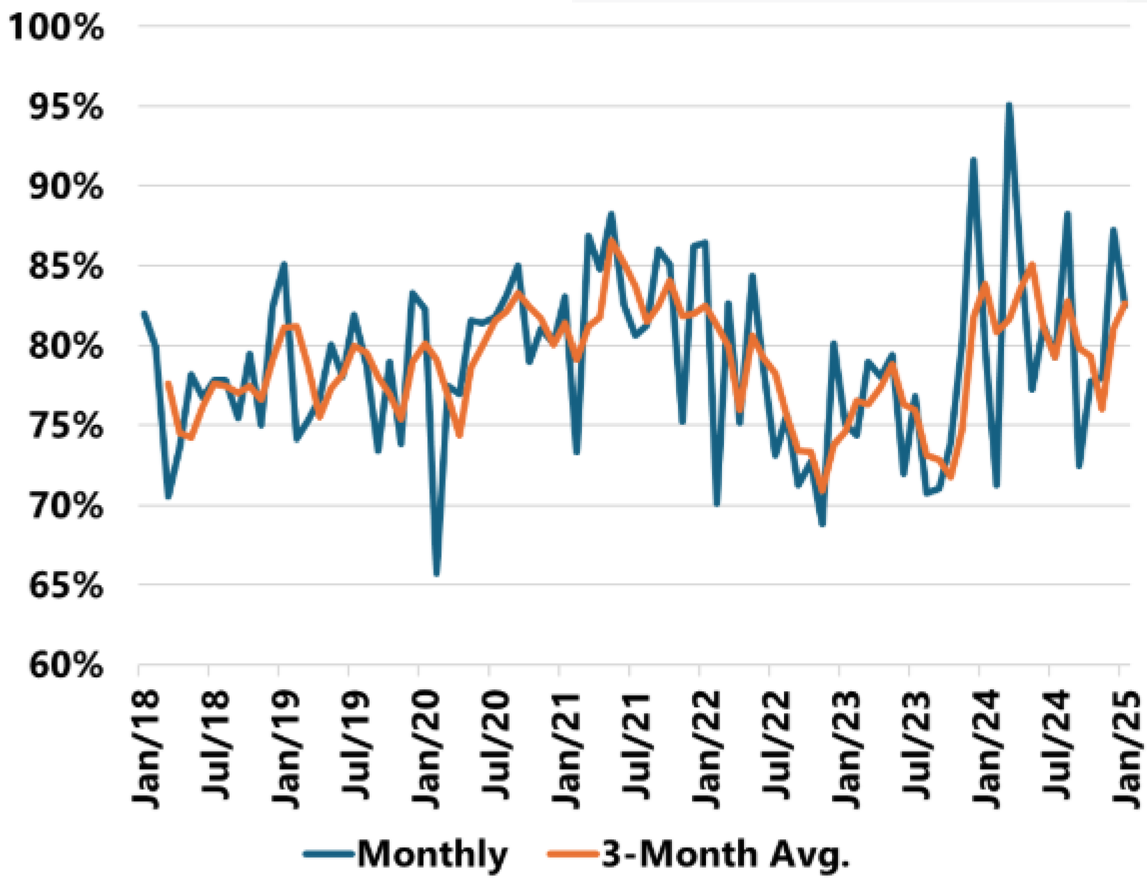
Source: Drewry

The company's most significant move is the acquisition of Hutchison Ports, which will grant it access to new markets, strengthen its position in major ports, and increase its global footprint. MSC will control approximately **15% of global terminal capacity** post-acquisition, solidifying its status as the world's top-ranked GTO. However, competition authorities are scrutinising the deal, particularly in the Netherlands, Spain, and Panama, where concerns over market concentration have been raised. A further interesting development has been the deployment of Ultra-Large Container Vessels to the West African port of Lome – a first for Africa.

ii. Global container demand and capacity utilisation

In January 2025, global container volumes reached **15,4 million TEU**, marking a **↑5,8%** year-on-year increase. Analysis by Sea Intelligence this week showed that adjusted for nautical distance, global TEU*Miles grew by **↑8,1%** year-on-year, indicating robust distance-adjusted container demand. Head-haul trades experienced a substantial **↑12,9%** year-on-year growth. This growth contrasts with the over **↑20%** increases in 2024, which were influenced by service rerouting due to the Red Sea crisis. Notably, Asia-Europe routes saw a utilisation drop in January, earlier than the typical post-Chinese New Year decline, potentially explaining the early decrease in spot rates. Conversely, Asia-North America routes experienced strengthened utilisation, maintaining firmer spot rates. Europe-North America routes faced a sharp utilisation drop without a significant spot rate decrease.

Figure 18 – Far East-Europe nominal utilisation



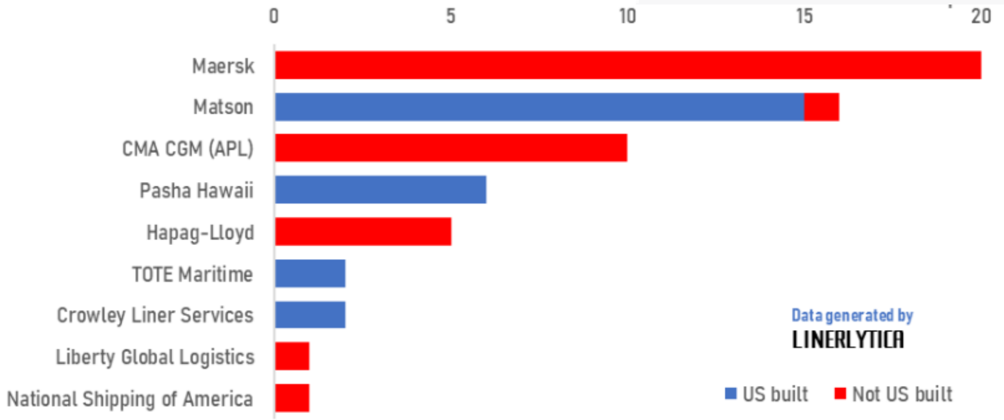
Source: Sea Intelligence

Although capacity utilisation across several key trade routes has slipped below 90% (as also illustrated above), carriers are pushing ahead with new service launches. Next month, a new Asia-North Europe service and three new Asia-South America services will be launched, including a new China-Mexico service that will feature seven new Asian entrants to the Mexican market.[11]

iii. US efforts to revise domestic shipbuilding

The US efforts to revive its shipbuilding industry are unlikely to gain significant traction despite the US Trade Representative's (USTR) proposal to impose levies on Chinese-built ships and offer incentives for operators using US-built vessels. The US has only 63 US-flagged containerships, representing a mere **0,9%** of the global fleet of 6 874 ships. Of these, only 25 ships were built in the US, primarily for Jones Act trades, while the remaining 38 were foreign-built.

Figure 19 – US-flagged container ship fleet (no. of ships)



Source: Linerlytica

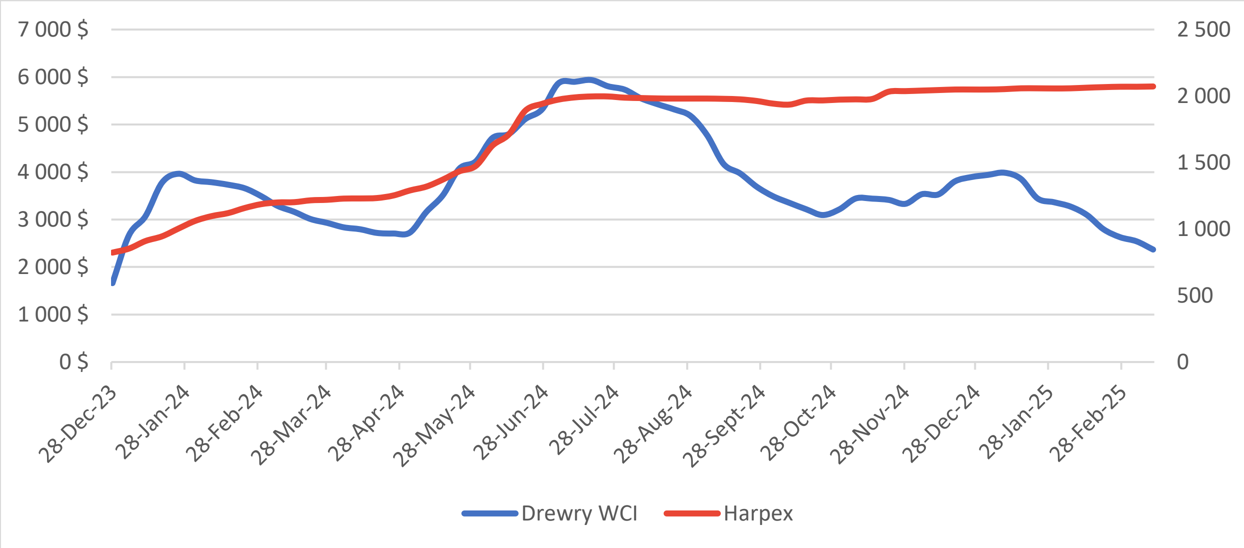
Major global carriers—Maersk, CMA CGM, and Hapag-Lloyd—operate these foreign-built U.S.-flagged ships under the Maritime Security Program (MSP) and Voluntary Intermodal Sealift Agreement (VISA). These programs allow the US government access to these vessels during national emergencies in exchange for retainer fees and priority access to Department of Defence (DoD) cargo. The USTR's proposals are unlikely to attract interest beyond the existing operators, as the high costs associated with US-built ships would render them uncompetitive in the international market.

iv. Global freight and contract rates

Global container spot rates have continued their decline as Drewry's "*World Container Index*" dropped another **↓6,8%** (or **$173**) and now trade at around **$2 368 per 40-ft container**[12]. Charter rates remain elevated elsewhere, as the *Harper Petersen Index* (Harpex) traded around **2 072 points** (**↑72%**, y/y) on Friday.[13] The diverging trend in the two indices are evident, with the divide very significant since the start of last year:

[11] Linerlytica. 17/03/2025. Market Pulse – Week 11.
[12] Drewry. 13/03/2025. World Container Index.
[13] Harpex. 14/03/2025. Harper Petersen & Co Charter Rate Index.

Figure 20 – World Container Index ($ per 40ft, YTD)



Source: Calculated from Drewry & Harpex

Indeed, the unabated demand for ships is keeping the charter market high despite the freight market slump that has driven spot rates down by another substantial margin this week. The gap between freight rates and charter rates has widened further, with the "*charter-to-freight-rate*" ratio reaching a record high of **289%**. If cargo demand fails to rebound to drive a freight rate rally, a charter market correction could be due soon.[14]

b. Global air cargo industry

Global air cargo volumes remained stable in early March, with total tonnages in week 10 (3–9 March) up **↑2%** year-on-year (y/y). Asia Pacific saw a **↑5%** weekly increase, recovering to pre-Lunar New Year levels, while declines were recorded in Central and South America (**↓9%**), Europe (**↓3%**), North America (**↓2%**), the Middle East and South Asia (**↓1%**), and Africa (**↓1%**). Over weeks 9 and 10 combined, worldwide tonnages rose **↑4%** (y/y), led by an **↑8%** gain from Asia Pacific, partly due to Lunar New Year timing differences.

Figure 21 – Capacity, chargeable weight and rates by region (last two – to five weeks, % change)

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

Source: World ACD

[14] Linerlytica. 17/03/2025. Market Pulse – Week 11.

Average worldwide air cargo rates rose **↑5%** (y/y) to **$2,33/kg**, with spot rates stable at **$2,55/kg**. Asia Pacific spot prices increased **↑11%** (y/y) despite a **↓1%** weekly dip. Meanwhile, demand from Dubai to Europe fell **↓15%** (w/w), contributing to a **↓12%** drop in spot prices to **$1,88/kg**, likely impacted by Ramadan's start on 28 February.

ENDS[15]

[15]**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.*