

Cargo Movement Update #229¹

Date: 13 April 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)	40 302	45 915	86 217	30 402	34 637	65 039	↑33%
Air Cargo (tons)	3 870	2 051	5 921	4 358	3 049	7 407	↓20%

Monthly Snapshot

Figure 1 – Cyclical⁴ monthly cargo volume, year on year (most metrics: Feb '24 vs Feb '25, % growth)

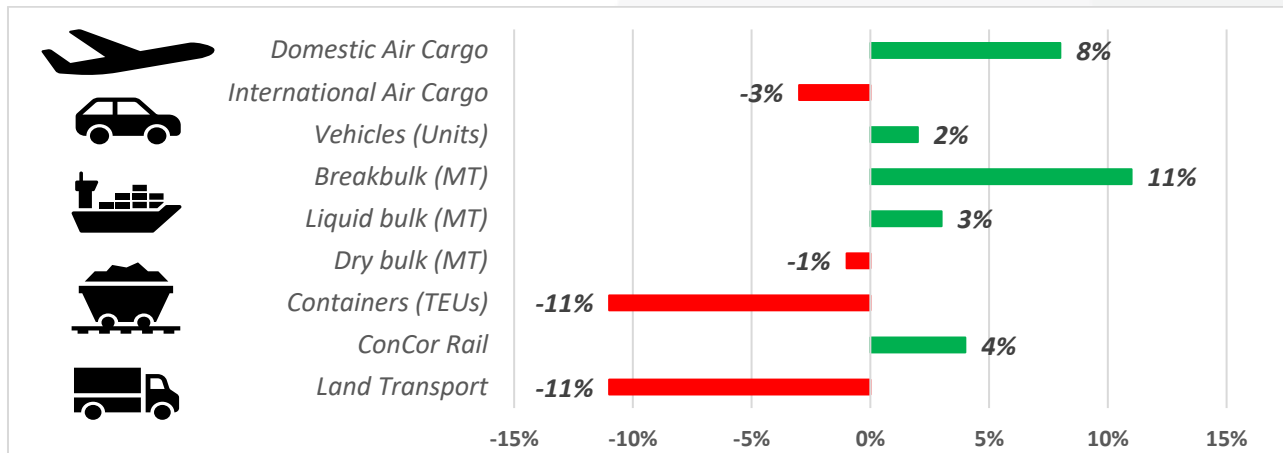
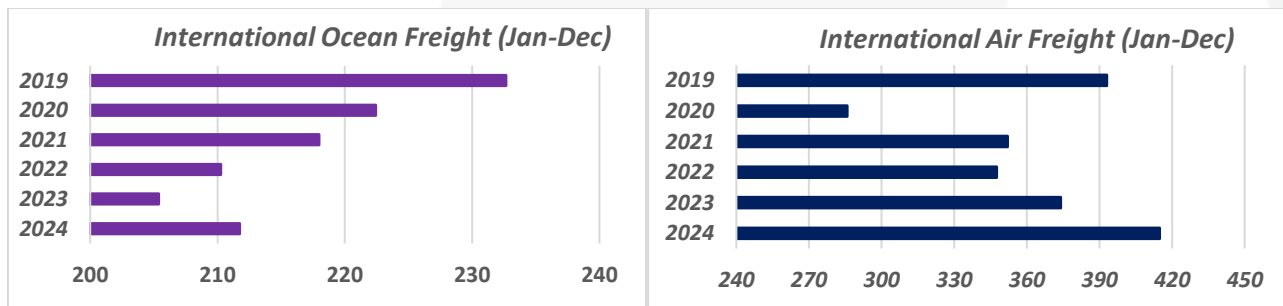


Figure 2 – Year-to-date flows 2019-2024⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~12 317 TEUs was handled per day, with ~12 964 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 2 701 containers, up by ↑1% from last week.
- Truck volumes through Lebombo increased to 1 486 HGVs/day (↓2%); with average crossing times 3,3 hrs.
- Cross-border queue: ↓0,6 hrs; transit: ↓0,5 hrs; SA borders: 10,9 hrs (↓20%); SADC: 5,0 hrs (unchanged).
- Global container volume (dry & reefer) is down by ↓13,6% (m/m) and ↓0,7% (y/y) in February.
- Global spot rates have increased again this week – by ↑2,6% (or \$57) to \$2 265/40'.
- February notes the first decline in global air cargo since mid-2023, despite strong demand and firm rates.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 229th 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. At our container terminals, an average of **12 317 TEUs** was handled per day, representing an increase from **9 291 TEUs** the previous week. All terminals registered an increase after the low levels recorded last week. Port Operations were shaped by inclement weather, vacant berths, as well as continuous equipment breakdowns and shortages. Dense fog disrupted operations at the Port of Cape Town for more than ten hours this week, while the main operational constraints in Durban proved to be vacant berths and continuous equipment breakdowns. Inclement weather conditions and vacant berths mainly impacted operations at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. The latest reports from Maersk suggest that the Maersk Florence 512E will call Cape Town and omit Coega, and the Hedwig Schulte will omit Cape Town and call Coega to maintain schedules. These reports also suggest that the GSL LALO 515N will omit her Port Elizabeth call and proceed to Durban. Additionally, towards the end of the week, overhead power failures, accompanied by cable theft, disrupted rail operations near City Deep for around 12 hours, while repairs are also ongoing on the line near Capital Park after the extensive cable theft experienced earlier this week.

This week's global trade narrative remains dominated by US tariff policy, following President Trump's announcement of a 90-day suspension of elevated tariffs for most partners—**excluding China**, which now faces **punitive duties of up to 145%**. While the pause temporarily buoyed investor sentiment, the **average US tariff rate has climbed to 24%**, intensifying macroeconomic uncertainty. Businesses are delaying capital spending, supply chains are adjusting cautiously, and inflationary pressures persist—**all amplified by heightened trade policy unpredictability**, as captured in Bloomberg's uncertainty index.

For South Africa, the risks are twofold: weakened external demand and growing trade marginalisation as global systems fragment. Shipping markets reflect this turbulence, with **container bookings from China to the US plunging 30–60%**, triggering cancellations and insolvencies among carriers. Meanwhile, **global container throughput contracted by ↓13,6% month-on-month in February**, reflecting the seasonal post-Chinese New Year lull and a broader softening in trade volumes. The situation remains fluid and warrants close monitoring.

International air cargo to and from South Africa saw a significant reduction this week. The daily average of air cargo handled at ORTIA in the previous week amounted to **552 838 kg** inbound (↓11%, w/w) and **293 063 kg** outbound (↓33%). After some decent weeks, this week saw a significant reduction. Nevertheless, the current volumes remain similar to last year's levels (↑4%, y/y), but below the comparative levels of pre-pandemic 2019 (↓13%). Overall, levels were significantly up for March versus February (↑33%, m/m) and 2024 (↑14%, y/y).

Operationally, strategic engagement between the private sector and ACSA is progressing to address infrastructure and operational challenges in air cargo. On the regulatory front, efforts are underway to align on de-grouping and bond store procedures amid tighter enforcement conditions.

Global air cargo demand showed signs of weakening in early 2025, with IATA reporting a marginal year-on-year decline in February (↓0,1%) and World ACD noting a sharp ↓7% week-on-week drop in early April, partly due to Eid and trade-related uncertainty. Despite the softening in volumes, average rates have held firm or even increased, supported by capacity adjustments and regional pricing resilience, particularly out of Asia Pacific. Overall, the market reflects a delicate balance between stabilising demand, evolving geopolitical risks, and persistent rate pressures.

Cargo flows across the Lebombo Border Post and N4 Corridor have decreased slightly this week, with truck volumes at **1 486 HGVs per day** (↓2%, w/w). There was an average of **3,5 hours'** worth of queuing time at the border, as the average processing time hovered around the same duration – **3,3 hours** per crossing. Rail to Maputo was stable at an average of **eight trains daily** (although there were some gaps in the numbers). Sugar trains from Eswatini were stable at around **two trains a day** (when reported).

For the rest of the SADC borders, the average queue times decreased by around **half an hour** from last week, as transit times also decreased – by around the same magnitude. The median border crossing times at South African borders decreased by almost **three hours**, averaging **~10,9 hrs** (↓20%) for the week. In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~5,0 hrs (no change)**. On average, two SADC borders took more than a day to cross last week, namely the usual suspects of Beitbridge and Kasumbalesa (the worst affected, with an average of nearly **two and a half days** from the **Zambia side**). Other developments include **(1)** Lobito corridor expansion (Angola–DRC–Zambia, **(2)** Walvis Bay–Ndola–Lubumbashi Corridor updates, **(3)** Ethiopia–Djibouti connectivity improvements, and **(4)** Zimbabwe – Regulatory and Security Updates.

As the logistics sector continues to navigate a mix of persistent constraints and emerging opportunities, collaboration remains our most powerful lever. This week's high-level NLCC deliberations on supply chain reform are a timely reminder of the urgency and complexity of the task at hand. While formal structures are valuable, it is the day-to-day commitment of all stakeholders—public and private—that will ultimately drive change. Let's keep the momentum going: share your insights, raise the flags early, and remain active in shaping the logistics ecosystem South Africa needs.

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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. The reporting aligns with TPT's cycle, which runs from Mondays to Sundays.

Table 2 – Container Ports – Weekly flow reported for 7 to 13 April (measured in TEUs)

7-day flow reported (31/03/2025 – 13/04/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 690	32 833	↑12%
New Pier (Pier 1)	2 029	14 201	↑72%
Cape Town Container Terminal	2 221	15 550	↑67%
Ngqura Container Terminal	2 032	14 224	↑4%
Port Elizabeth Container Terminal	238	1 664	↑125%
Other	1 106	7 745	↑111%
Total	12 317	86 217	↑33%

Source: Calculated from TPT, 2025. Updated 13/04/2025.

A significantly increased average of ~**12 317 TEUs** (↑33%) was handled per day for the last week (7 to 13 April, Table 2), but was still below the projected average of ~**12 964 TEUs** (↓5% actual versus projected).

For the coming week, a similarly increased average of ~**12 964 TEUs** (↑5%) is predicted to be handled (14 to 20 April, Table 3). Port Operations were shaped by inclement weather, vacant berths, as well as continuous equipment breakdowns and shortages.

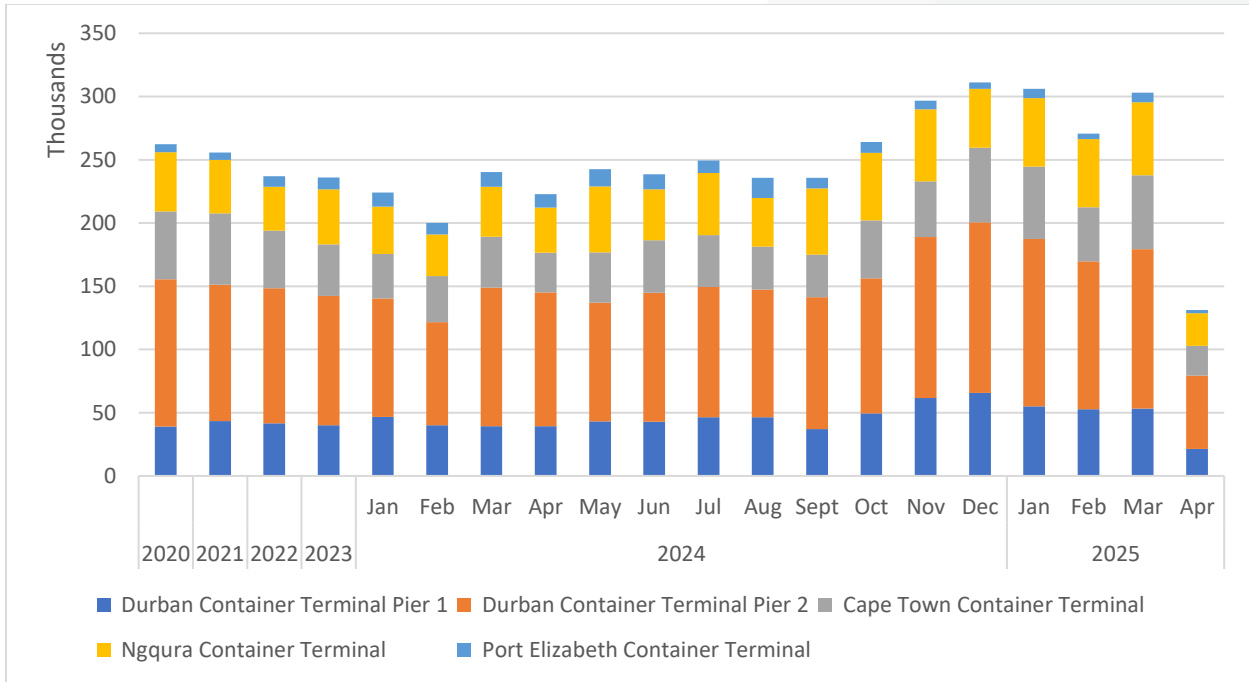
Table 3 – Container Ports – Weekly flow projected for 14 to 20 April (measured in TEUs)

7-day flow projected (14/04/2025 – 20/04/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 805	40 635	↑24%
New Pier (Pier 1)	2 225	15 576	↑10%
Cape Town Container Terminal	1 053	7 369	↓53%
Ngqura Container Terminal	2 353	16 474	↑16%
Port Elizabeth Container Terminal	454	3 175	↑91%
Other	1 075	7 522	↓3%
Total	12 964	90 751	↑5%

Source: Calculated from TPT, 2025. Updated 13/04/2025.

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.

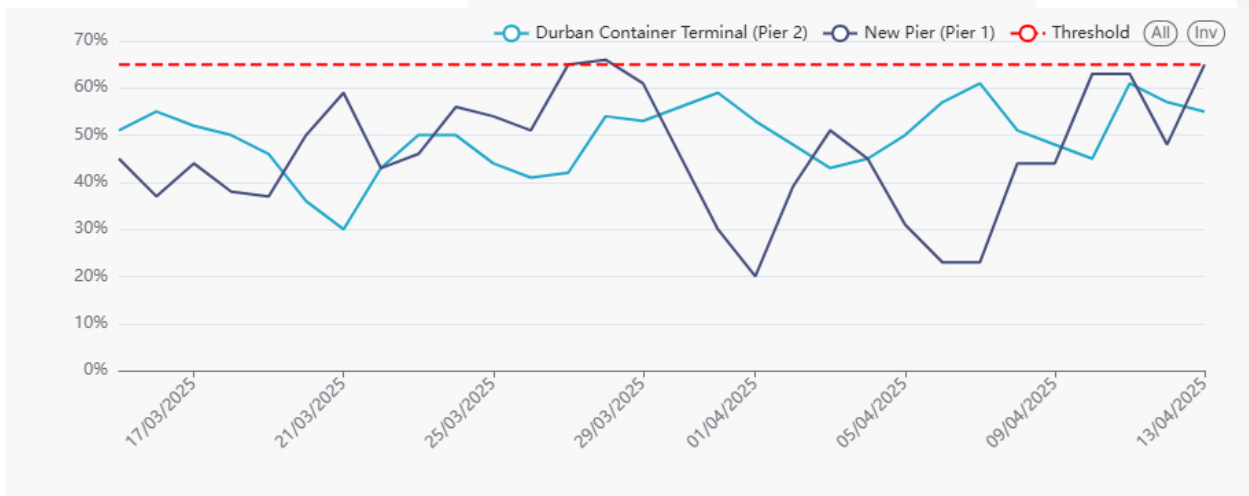
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 13/04/2025.

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

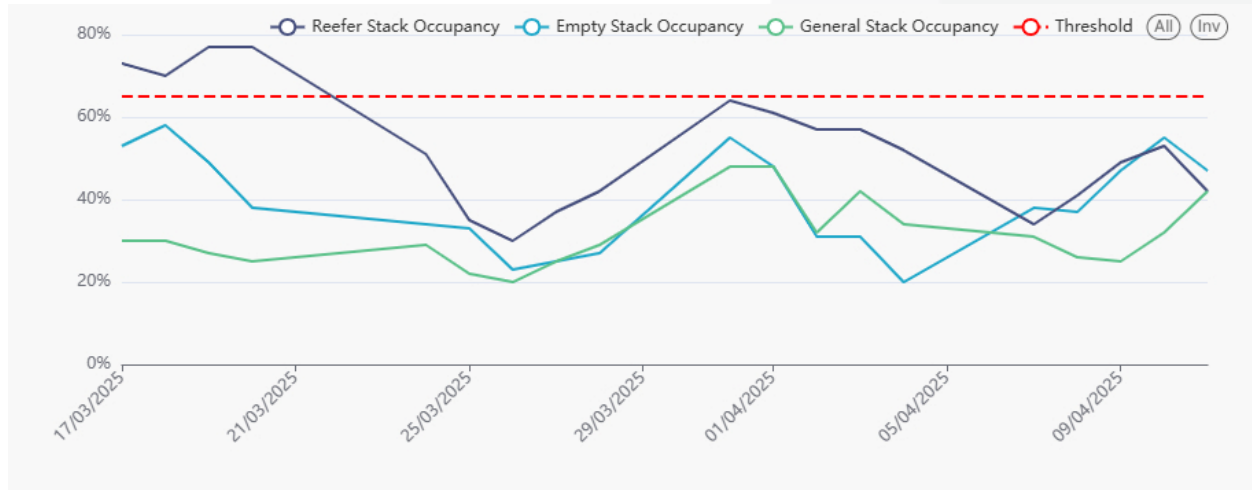
Figure 4 – Stack occupancy in DCT, general-purpose containers (9 March to present; a day on the day)



Source: Calculated using data from Transnet, 2025, and updated 13/04/2025.

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 (9 March to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 13/04/2025.

b. Summary of port operations

i. Weather and other delays

- Dense fog disrupted operations at the Port of Cape Town for over ten hours this week.
- The main operational constraints in Durban proved to be vacant berths and continuous equipment breakdowns.
- Inclement weather conditions and vacant berths mainly impacted operations at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

ii. Cape Town

On Friday, CTCT recorded three vessels at berth and six at anchor, as dense fog proved to be the primary operational constraint. The terminal went fogbound on Tuesday evening around 23:00 and only resumed operations around 11:00 on Wednesday morning. On the landside, between Monday and Friday, the terminal managed to service at least 3 839 trucks while handling approximately 209 rail units. On the waterside, the terminal executed approximately 7 160 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 42%, reefers at 42%, and empties at 47%**. Additionally, the terminal operated with **seven STS cranes, 22 RTGs, and 56 hauliers** towards the end of the week. The latest reports suggest that the *Rudolf* completed the offloading of the new RTGs destined for the port.

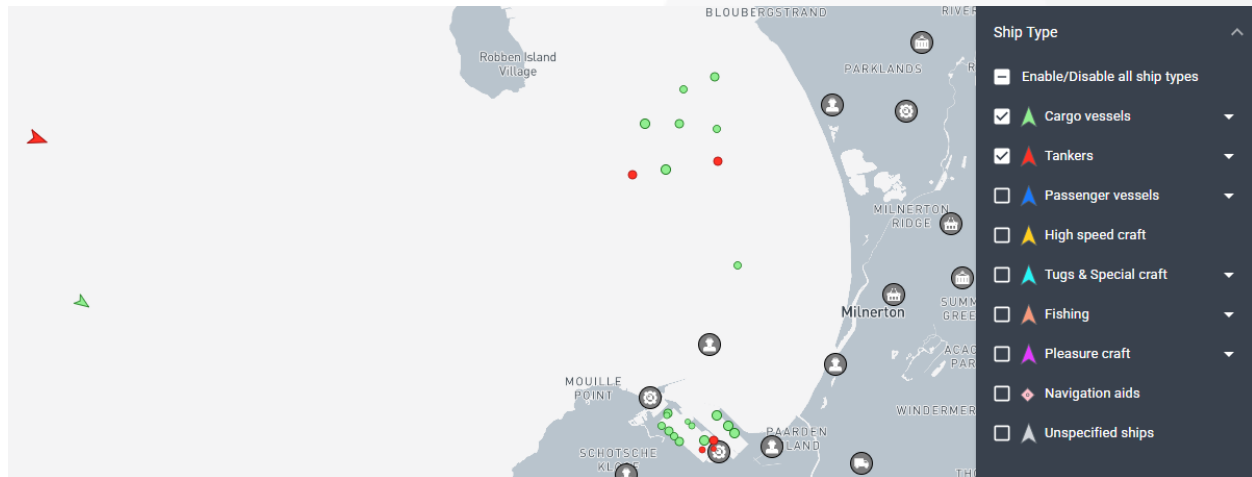
The latest reports from Maersk suggest that Cape Town is experiencing significant delays with waiting time now ranging between 13-16 days. Thus, in order to ensure timely arrival in Jebel Ali while securing coverage at both the Ports of Cape Town and Coega, the Maersk Florence 512E will call Cape Town and omit Coega. Additionally, the Hedwig Schulte will omit Cape Town and call Coega. Additionally, the vessels will swap windows into Jebel Ali whereby the Maersk Florence will berth in Jebel Ali on 06/05, and the Hedwig Schulte will berth in Jebel Ali on 29/04.

On Friday, CTMPT recorded two vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 476 container moves and 4 080 tons across the quay on the waterside. On the landside, 276 trucks were processed during the same period. Stack occupancy was recorded at 49% for

general cargo, 12% for reefers, and 41% for empties. Towards the end of the week, the terminal operated with two cranes and three straddle carriers. Crane LM400 remained out of commission with the technical team awaiting the arrival of the machine’s new control panel after sustaining water damage.

Between 31 March and 06 April, the FPT terminal handled five vessels: one multi-cargo, two dry bulk, one container, and one vessel containing cement. Berth occupancy during this period was recorded at 53%. The terminal planned to handle five more vessels between 07 and 13 April, with another five vessels scheduled between 14 and 20 April. The late arrival of cargo mainly ensured operational constraints during this period.

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



Source: Marine Traffic. Updated 07/04/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, operated by five gangs, with zero vessels at anchor. Stack occupancy was **63% for GP containers**. Between Monday and Friday, the terminal executed at least 4 101 gate moves and 270 rail moves on the landside. The **average TTT** for the week was **~75 minutes (↓29%, w/w)** and an average **staging time** of **~51 minutes (↓25%)**. 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 **ten RTGs** towards the end of the week. Furthermore, the terminal experienced some vacant berths at the start of the week, impacting operations at the terminal as a result.

Pier 2 had four vessels on berth and zero at anchorage on Thursday, as equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **45% for GP containers**. The terminal operated with **ten gangs** and moved over 17 100 containers across the quay between Monday and Friday on the waterside. Approximately 12 486 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~96 minutes (↓26%, w/w)** and staging time of **~110 minutes (↓17%)**. Approximately 1 536 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **53** and **61** out of a fleet complement of **88** this week. Thus, the availability figure improved to roughly at **65%** during this period.

Durban's MPT terminal recorded one vessel at berth on Thursday and zero at outer anchorage. Stack occupancy for containers was 21%, with the breakbulk stack at 10%. In the preceding 24 hours, the terminal handled 433 containers but zero tons of breakbulk on the waterside. On the landside, 217 container trucks and 14 breakbulk RMTs were serviced. During this period, two cranes, seven reach stackers, seven forklifts, and 19 ERFs were in operation. The latest reports suggest that the third crane is anticipated to return to

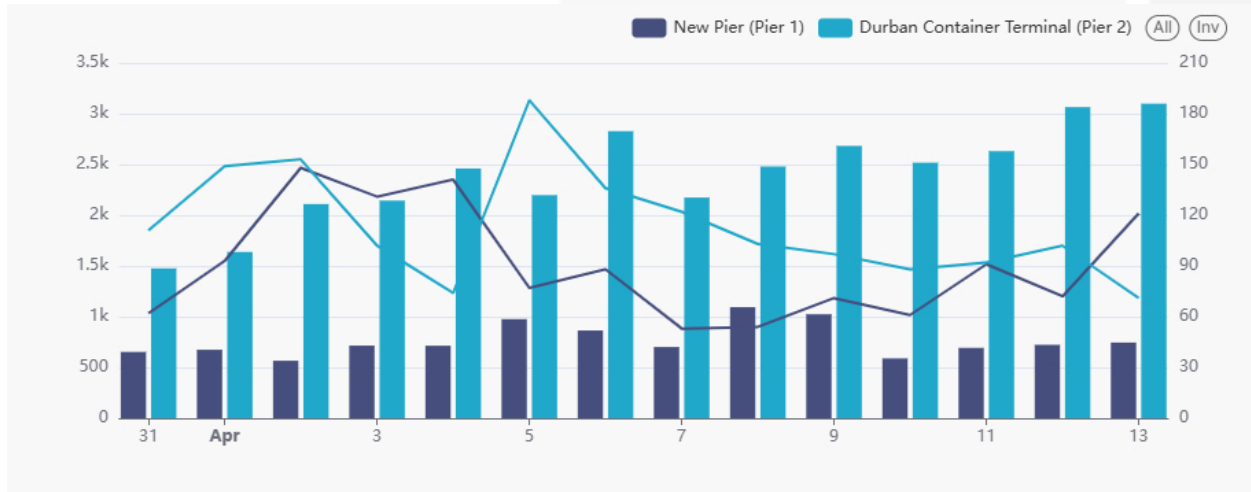
operations over the weekend, while the fourth crane should return to service around the end of July. Lastly, on Tuesday, Durban MPT staff and management celebrated a record of 200 000 TEUs’ handled during the 2024/25 financial year.

On Thursday, the Maydon Wharf MPT recorded zero vessels at berth and none at anchor. No volumes were handled on the waterside nor on the landside. At the agri-bulk facility, zero vessels were berthed or at anchor on Thursday. However, one vessel completed in the 24 hours before and managed to handle 1 361 tons on the waterside. No volumes were handled on the landside.

On Wednesday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with none at anchorage. In the 24 hours leading to Thursday, the terminal handled 1 099 road and 147 rail units on the landside while also handling 145 units on the waterside. Overall stack occupancy was 48%, 80% at Q&R, and 30% at G-berth. During this period, the terminal had 127 high-and-heavy (abnormal loads) on hand and managed to handle 28.

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.

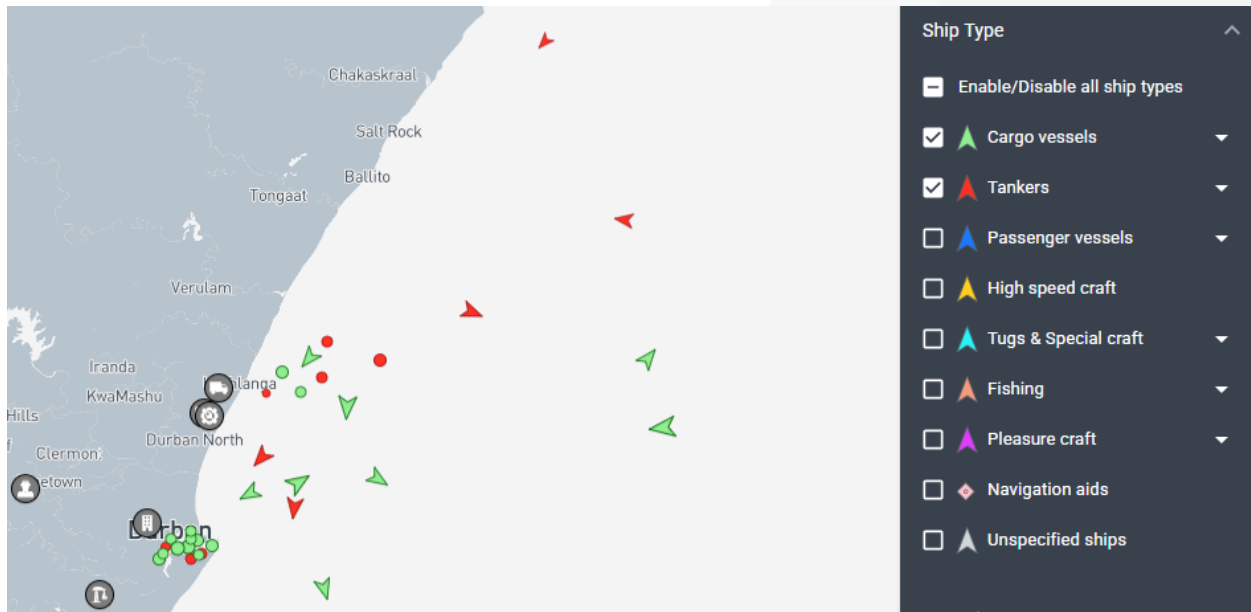
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 13/04/2025.

The queue of container vessels waiting outside Durban remains relatively low. On Monday evening (14 April), **four** container vessels were waiting outside at anchorage – **one** for Pier 1 and **three** for Point terminal. The queue of dry (**four**), liquid (**six**), and breakbulk (**one**) vessels has increased from last week but still remains low, as evidenced by the snapshot:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 31/03/2025 at 14:00.

iv. Richards Bay

On Friday, Richards Bay had ten vessels at anchor and 14 on the berth, translating to five vessels at DBT, five at MPT, four at RBCT, and none at the liquid bulk terminal. Two tugs and one pilot boat operated for marine resources towards the end of the week. The port helicopter went out of commission due to undisclosed reasons, with no ETR communicated by TNPA yet. The daily average for the week decreased significantly to around **124 700 tons** (**↑12%**, w/w). An average of **18 trains** (down by two from last week) were serviced on the landside, slightly below the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded three 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 13% for reefers, 22% for reefer ground slots, and 7% for the general stack. Despite having vacant berths and briefly experiencing adverse weather during this period, the terminal handled over 3 200 TEUs and 198 reefers on the waterside. Approximately 697 trucks were processed on the landside at a TTT of ~27 minutes. Towards the end of the week, the terminal had seven STS cranes, 25 RTGs, and 76 hauliers in service.

The Maersk Cubango’s omission of Coega to recover her schedule will not be enough to ensure on-time arrival in Jebel Ali. According to estimations, the Maersk Cubango will be 4-5 days late into Jebel Ali, which means she will miss her window. As a result, the Maersk Colombo will be departing South Africa earlier than the Maersk Cubango in an attempt to ensure weekly coverage in Jebel Ali.

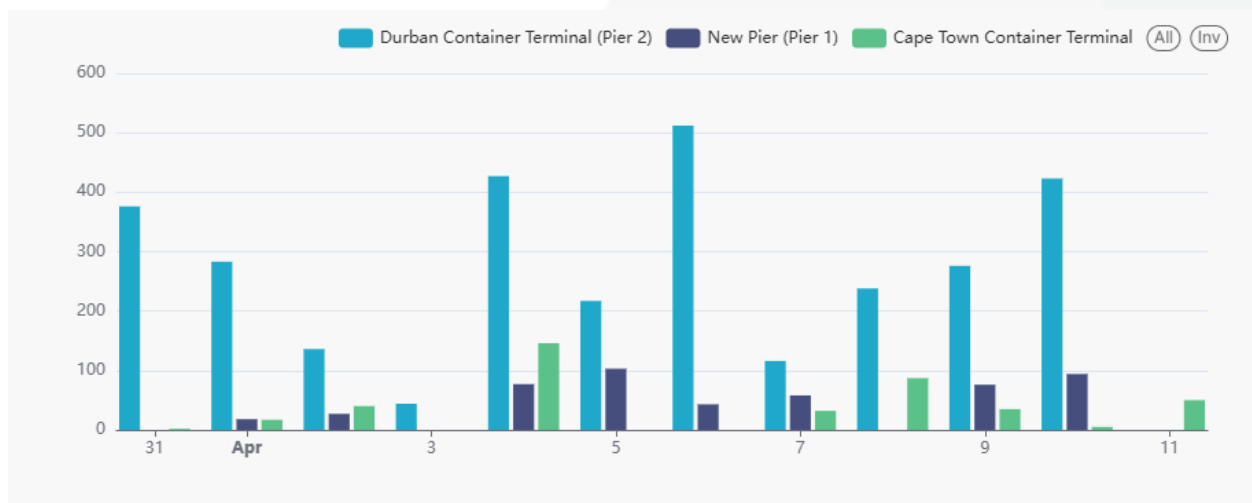
On Wednesday, GCT had zero vessels at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the preceding 24 hours. During this period, 318 trucks were processed at a TTT of ~33 minutes on the landside, while 152 TEUs and 31 reefers were handled across the quay on the waterside. Stack occupancy was recorded at 19% for the general stack, 1% for reefers, and 18% for reefer ground slots.

The latest reports from Maersk suggest that the GSL LALO 515N will omit her Port Elizabeth call and proceed to Durban. This is mainly due to delays experienced in the previous Cape Town rotation caused by weather conditions which resulted in congestion at the port. As a result, exports will be moved to the Oslo Trader 516N, while imports will be discharged in Durban and will be loaded on the Horizon 466E for ZAPLZ02 discharge.

vi. Transnet Freight Rail (TFR)

Towards the end of the week, overhead power failures, accompanied by cable theft, disrupted rail operations near City Deep for around 12 hours. Additionally, repairs are also ongoing on the line near Capital Park after the extensive cable theft experienced earlier this week. Further, towards the end of the week, DCT Pier 2 had 432 ConCor units on hand with a dwell time of 144 hours and 296 over-border units with a dwell time of 47 days.

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



Source: Calculated using data from Transnet, 2024. Updated 13/04/2025.

In the last week (7 to 13 April), rail cargo on the ConCor line out of Durban was reported at **2 701** containers, up **↑1%** from the previous week’s **2 842** containers.

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 31 March. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in April 2024 averaged **~812 087 kg** daily.

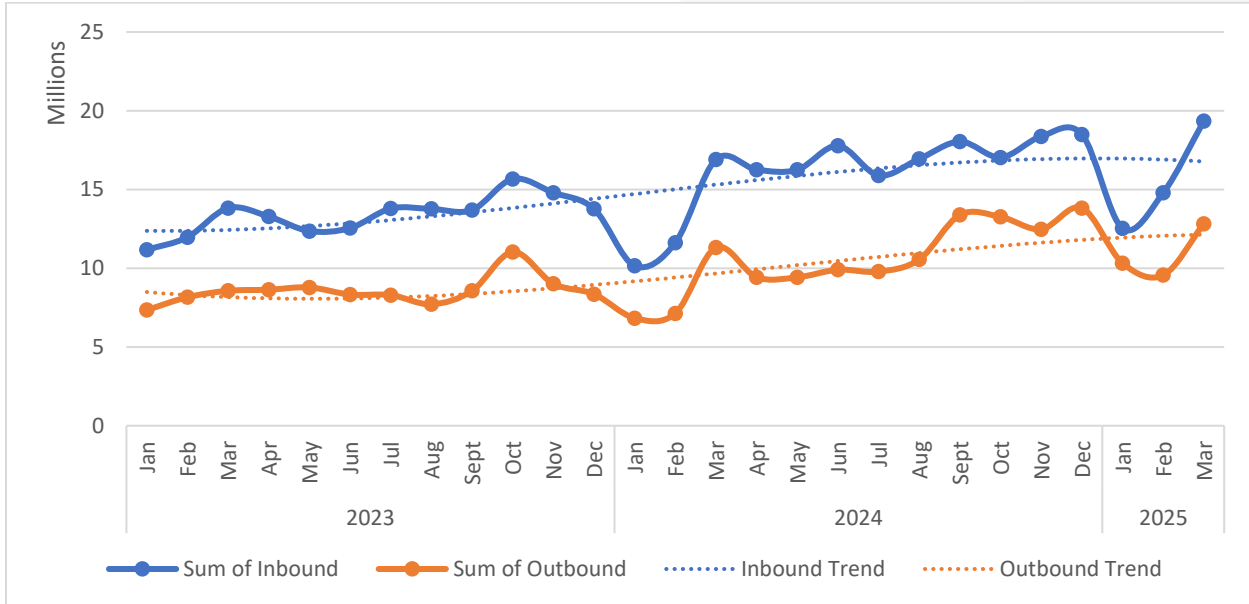
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	31-Mar	1-Apr	2-Apr	3-Apr	4-Apr	5-Apr	6-Apr	Week
Volume inbound	464 886	169 357	323 074	236 615	409 199	345 040	1 921 693	3 869 864
Volume outbound	131 898	148 581	183 511	167 149	268 776	204 434	947 093	2 051 442
Total	596 784	317 938	506 585	403 764	677 975	549 474	2 868 786	5 921 306

Courtesy of ACOC. Updated: 13/04/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **552 838 kg** inbound (↓11%, w/w) and **293 063 kg** outbound (↓33%). After some decent weeks, this week saw a significant reduction. Nevertheless, the current volumes remain similar to last year’s levels (↑4%, y/y), but below the comparative levels of pre-pandemic 2019 (↓13%). Overall, for March, levels were significantly up versus February (↑33%, m/m) and 2024 (↑14%, y/y). The following figure shows the air cargo flows to and from ORTIA since the start of 2023, with the uptick evident:

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



Calculated from ACOC. Updated: 13/04/2025.

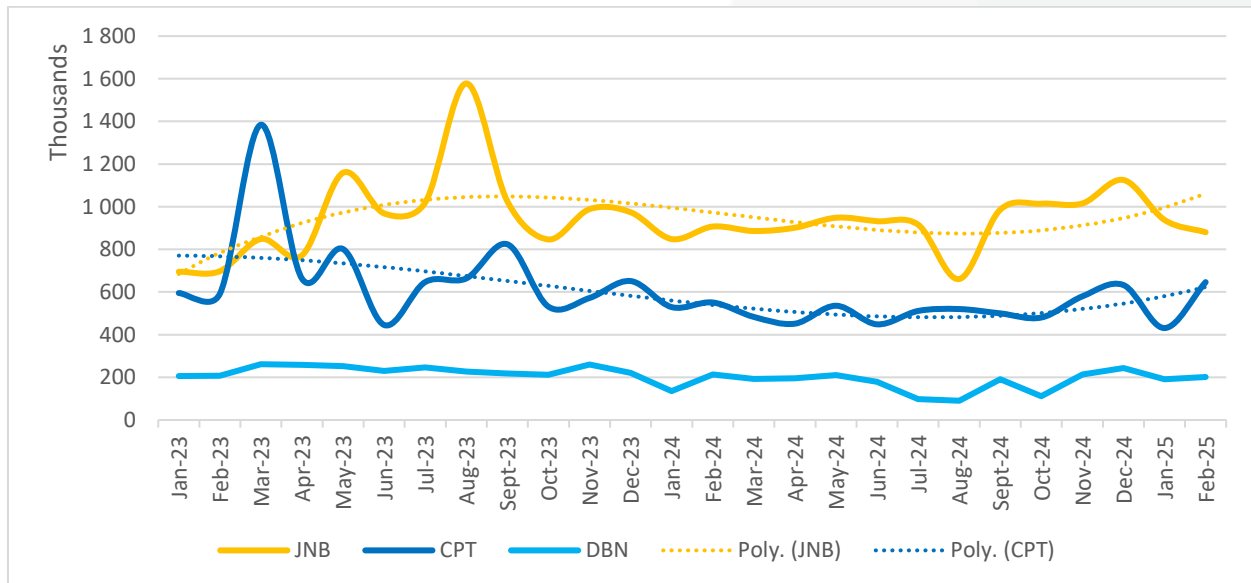
b. Cargo operations update

In addition to last week’s update, strategic engagement between the private sector and Airports Company South Africa (ACSA) has gained momentum, with a focus on resolving lease agreement backlogs, addressing infrastructure constraints, and ensuring operational readiness in line with projected air cargo demand. On the regulatory front, the industry is proposing alignment to tackle persistent challenges related to de-grouping procedures, bond store protocols, and broader compliance obligations. Stakeholders are reminded of the heightened enforcement environment, including the risk of license suspensions for non-compliant entities and revised Port Health procedures where three or more shipments are submitted under a single entry.

c. 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: 13/04/2025.

3. Road and Regional Update

a. Lebombo border post update

Cargo movements along the N4 corridor remained steady and uninterrupted during the week of 7 to 13 April, with no disruptions reported. The following notes summarise the recent developments:

- Truck volumes increased slightly this week, with truck volumes at **1 486 HGVs per day** (↓2%, w/w).
- There was an average of **3,5 hours'** worth of queuing time at the border, as the average processing time hovered around the same duration – **3,3 hours** per crossing.
- Rail to Maputo was stable at an average of **eight trains daily** (although reporting has not been comprehensive).
- Sugar trains from Eswatini were stable at around **two trains a day** (when reported).

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

Table 5 – 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	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
07-Apr-25	1 442	1 429	1 328	69	13	59	17	233	11	8	1	2
08-Apr-25	1 289	1 299	1 001	130	37	37	7	257	7	6	1	
09-Apr-25	1 430	1 304	1 032	204	48	61	15	297	11	7	1	3
10-Apr-25	1 610	1 429	1 054	235	41	74	60	260	1		1	
11-Apr-25	1 604	1 429	1 009	281	27	84	63	261	1		1	

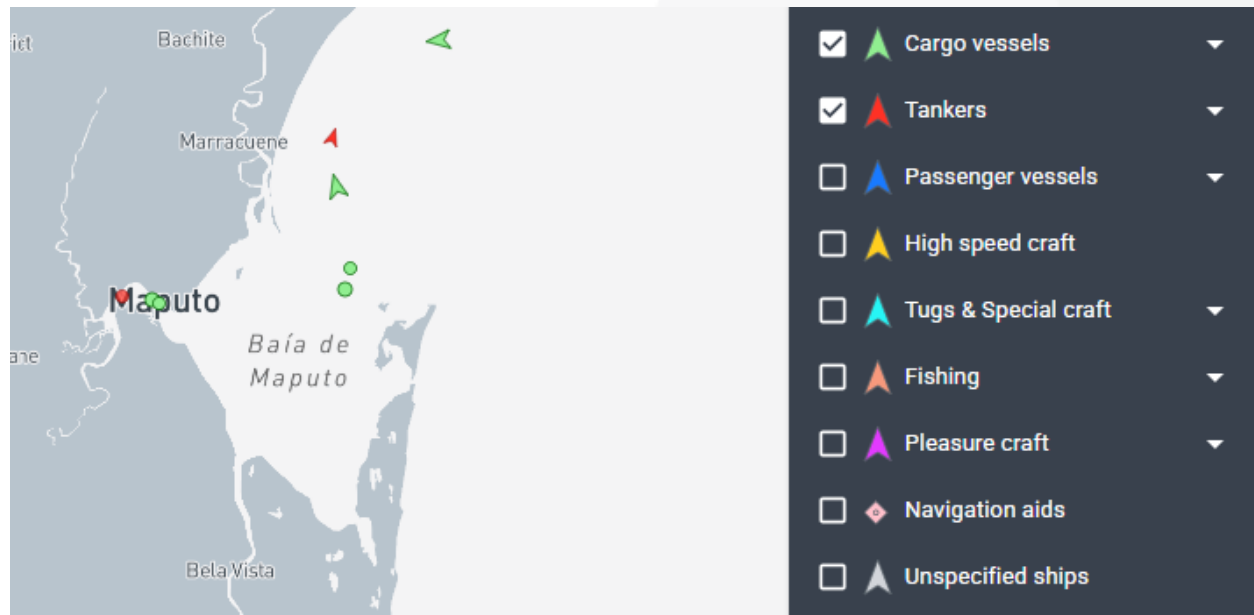
12-Apr-25	1 355	1 339	955	222	22	69	71	263	13	11	1	1
13-Apr-25	1 669	1 527	1 210	180	50	69	57	199	12	9	2	1
% of design capacity	99%	93%	90%	94%	n/a	129%	83%	10%	40%	82%	19%	44%
% change (d/d)	23%	14%	27%	-19%	127%	0%	-20%	-12%	-91%	-100%	*	-100%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 13/04/2025.

* = not reported

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

Figure 12 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 31/03/2025 at 14:00.

b. SADC cross-border and road freight delays

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

- The average queue times decreased by around **half an hour** from last week, as transit times also decreased – by around the same magnitude.
- The median border crossing times at South African borders decreased by almost **three hours**, averaging **~10,9 hrs (↓20%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~5,0 hrs (no change)**.

1. Lobito Corridor Expansion (Angola–DRC–Zambia):

- a. The Lobito Atlantic Railway, backed by Trafigura and over \$800 million in US funding, is expanding through the DRC Copperbelt and into Zambia.
- b. The initiative aims to enhance mineral export capacity and diversify away from China-linked routes.

2. Walvis Bay–Ndola–Lubumbashi Corridor:

- a. Zambia has ratified the tripartite agreement, advancing regional integration between Namibia, Zambia, and the DRC.

b. The corridor is expected to boost trade volumes and accelerate infrastructure upgrades.

3. Ethiopia–Djibouti Connectivity:

- a. There are ongoing talks about launching a cross-border public transport system to improve regional mobility.
- b. Concurrently, upgrades are underway on the Djibouti–Galafi road, a key import route into Ethiopia.

4. Zimbabwe – Regulatory and Security Updates:

- a. Under an amendment to the *Indigenization & Economic Empowerment Act*, the logistics sector has been reserved for nationals; foreign operators now need special permissions.
- b. Criminal syndicates target truck drivers at Beitbridge; stakeholders are warned not to engage with them to avoid drivers, cargo, and client supply chains.
- c. Complaints persist about Zimbabwean drivers being charged unreceipted visa fees in the DRC, and diplomatic discussions continue.

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

Table 6 – Delays⁶ summary – South African borders (both directions)

Border Post	Direction	HGV ⁷ 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	470	26,8	7,2	27,0	14 100	3 290
Beitbridge	Zimbabwe-SA	382	12,6	2,4	12,4	11 460	2 674
Groblersbrug	SA-Botswana	233	9,4	0,5	9,3	6 990	1 631
Martins Drift	Botswana-SA	182	2,1	0,3	2,1	5 460	1 274
Kopfontein	SA-Botswana	216	9,7	1,1	9,4	6 480	1 512
Tlokweng	Botswana-SA	33	0,6	0,2	0,3	990	231
Violsdrift	SA-Namibia	30	5,1	1,4	5,1	900	210
Noordoewer	Namibia-SA	20	2,7	0,5	2,4	600	140
Nakop	SA-Namibia	30	6,9	1,1	6,5	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,4	1,1	600	140
Skilpadshek	SA-Botswana	284	15,6	1,4	15,4	8 520	1 988
Pioneer Gate	Botswana-SA	69	0,0	0,0	0,0	2 070	483
Lebombo	SA-Mozambique	1 514	3,5	0,5	3,3	45 420	10 598
Ressano Garcia	Mozambique-SA	1 380	1,1	0,2	1,1	41 400	9 660
Sum/Average		4 863	6,9	1,2	6,8	145 890	34 041

Source: TLC, FESARTA, & Crickmay, week ending 06/04/2025.

⁶ 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.

⁷ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

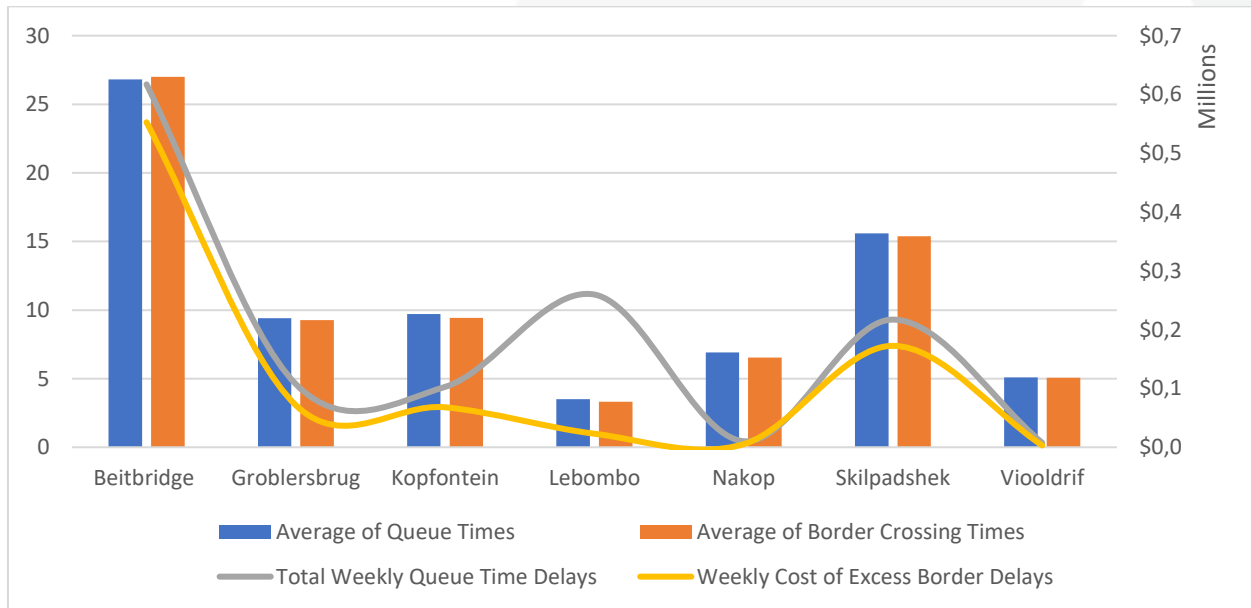
Table 7 – Delays summary – Corridor perspective

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	11,4	2,4	11,3	9 600	2 240
Central Corridor	798	5,5	1,8	4,5	23 940	5 586
Dar Es Salaam Corridor	1 819	17,2	1,1	17,1	54 570	12 733
Maputo Corridor	2 894	2,3	0,4	2,2	86 820	20 258
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 588	11,0	1,5	11,6	107 640	25 116
Northern Corridor	2 817	1,2	0,1	1,2	92 520	21 588
Trans Caprivi Corridor	116	9,2	2,2	8,9	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	383	5,1	0,6	4,8	11 490	2 681
Trans Oranje Corridor	100	4,0	0,8	3,8	3 000	700
Sum/Average	13 062	6,7	1,0	6,7	399 870	93 303

Source: TLC, FESARTA, & Crickmay, week ending 06/04/2025.

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

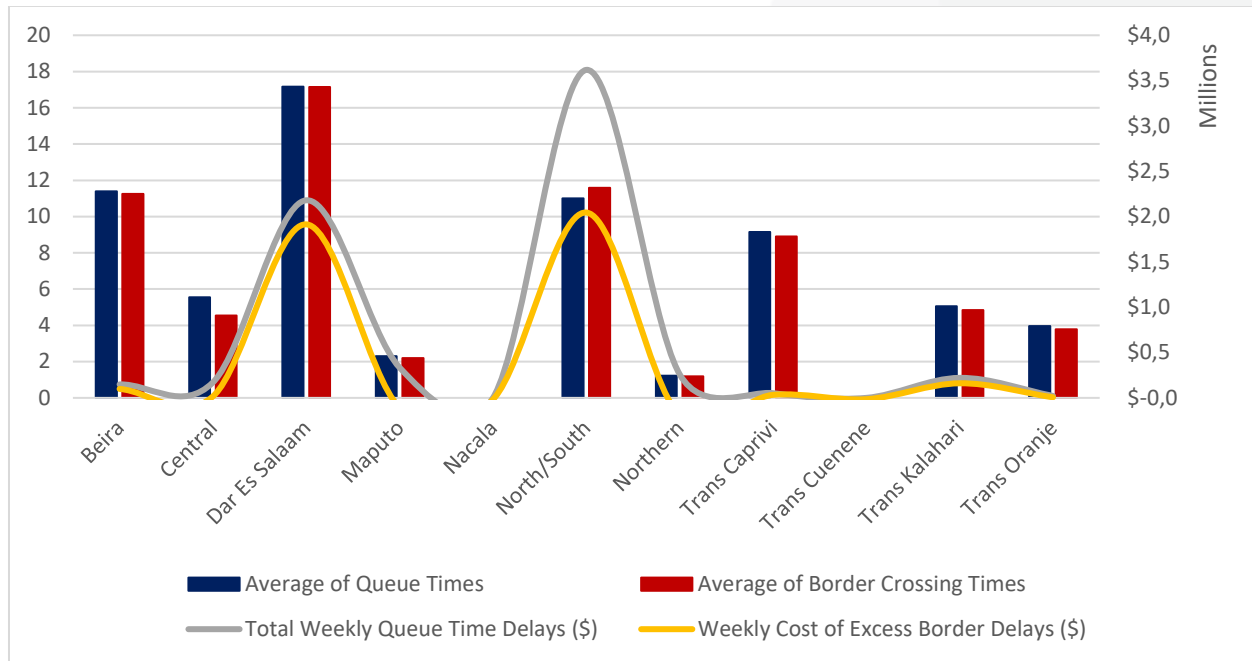
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 06/04/2025.

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

Figure 14 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 06/04/2025.

In summary, cross-border queue time averaged **~6,7 hours** (down by **~0,6 hours** from the previous week's **~7,3 hours**), indirectly costing the transport industry an estimated **\$7 million (R135 million)**. Furthermore, the week's average cross-border transit times hovered around **~6,7 hours** (down by **~0,5 hours** from the **~7,2 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$3,9 million (R76 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$10,9 million (R211 million)**, down by **~R7 million** or **↓3,2%** from **~R218 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) the global trade situation, (b) the global shipping industry and (c) the global aviation industry.

a. Global trade

i. US tariffs: economic impact and 90-day tariff pause (excluding China)

On 9 April, President Donald Trump announced a 90-day suspension of the elevated “reciprocal” tariffs for most US trading partners, maintaining only the baseline 10% tariff for now. Notably, **China remains excluded** from this reprieve, with tariffs on Chinese goods still climbing—**now reaching a punitive 145% on key categories**, including semiconductors, machinery, and consumer electronics.⁸

While the move temporarily eased investor anxiety—leading to a partial rebound in equity markets—the **broader macroeconomic effects remain negative**. Tariffs have raised the **average US tariff rate to 24%, up nearly 22 percentage points since Trump took office**, and the continued unpredictability of US trade policy

⁸ AP News. 09/04/2025. [Trump Tariffs Stock Market Deal](#).

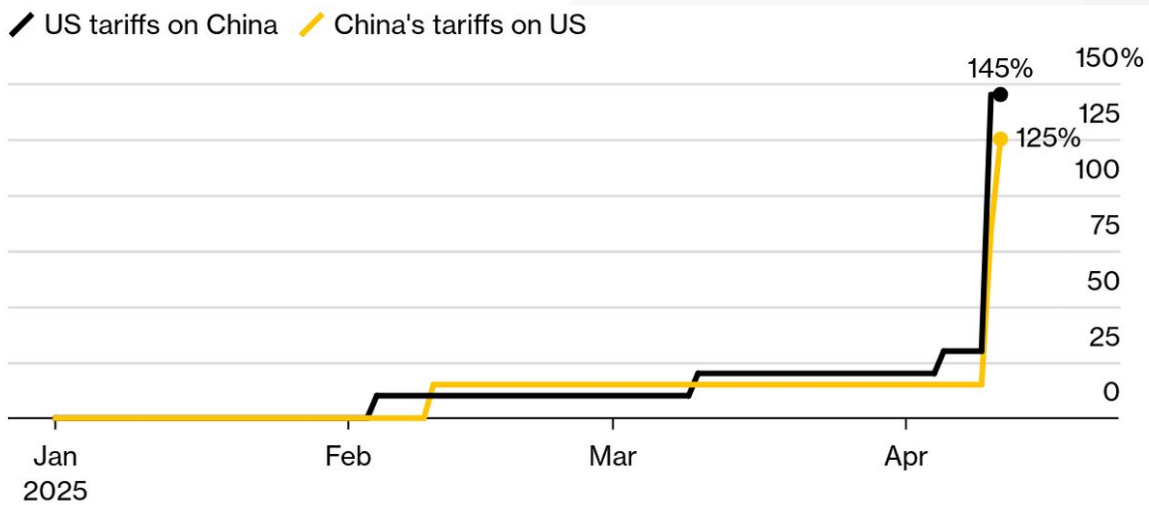
is driving capital expenditure paralysis among firms. Many US businesses are adopting a "wait-and-see" approach, contributing to supply chain delays and investment deferrals across sectors.

For South Africa, this uncertainty poses two main risks:

- **Volatility in Global Demand:** With US consumer-facing sectors under pressure from rising prices and input costs, **import demand for intermediate goods and commodities may weaken**, potentially reducing export opportunities for SA.
- **Trade Diversion and Marginalisation:** As global trade realigns toward bilateralism, **South Africa risks being sidelined** unless it strengthens its own trade diplomacy and regional trade facilitation capabilities.

The situation remains **highly fluid**, as illustrated by **rising trade policy uncertainty**—a factor increasingly considered a drag on global GDP growth.

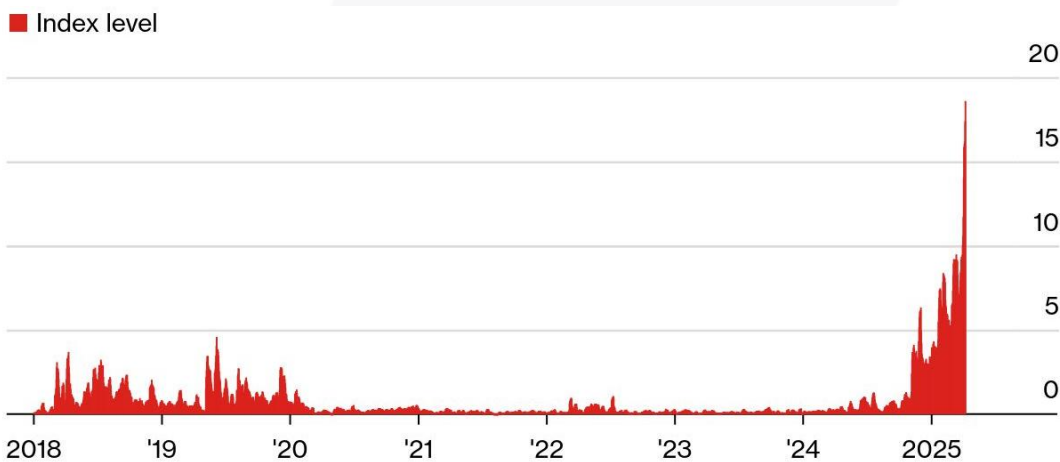
Figure 15 – Bilateral US-China tariff rate



Source: [Bloomberg](https://www.bloomberg.com)

The ongoing “trade war” is add to the already high levels of global complexity – fuelling policy uncertainty:

Figure 16 – Bloomberg Trade Policy Uncertainty

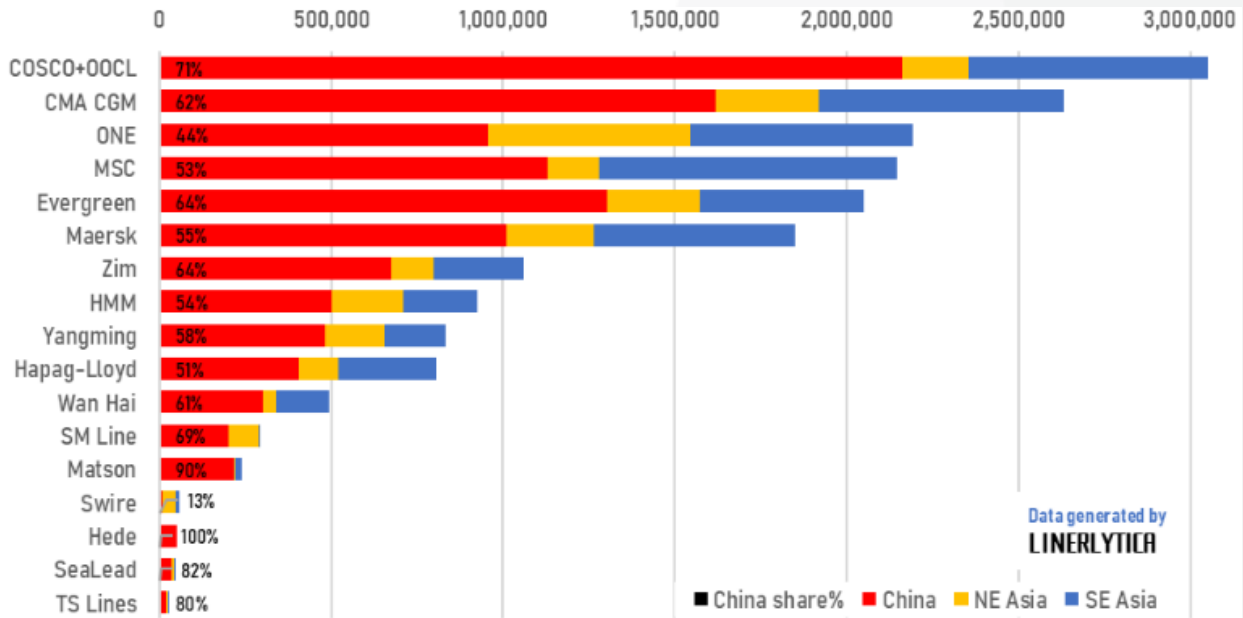


Source: [Bloomberg](https://www.bloomberg.com)

ii. Transpacific trade disruptions

Despite the temporary tariff pause for many regions, **US-China tensions continue to distort international shipping markets**. According to Linerlytica’s *Market Pulse – Week 15*, **container bookings from China to the US have dropped between 30–60%**, while other Asian routes are down 10–20% as the ripple effects of the trade war persist.

Figure 17 – Capacity growth in the eight weeks before/after CNY (%)



Source: Linerlytica

Several carriers have cancelled or delayed services, with examples including the **MSC Mustang** and **Premier Alliance PN4**, which were withdrawn prior to their maiden voyages. Smaller carriers such as **TS Line** are running ad hoc sailings in response to weak demand. The softening of spot freight rates has widened the gap between freight income and vessel charter costs, leading to insolvencies—most recently **Singapore-based Vasi Shipping**.

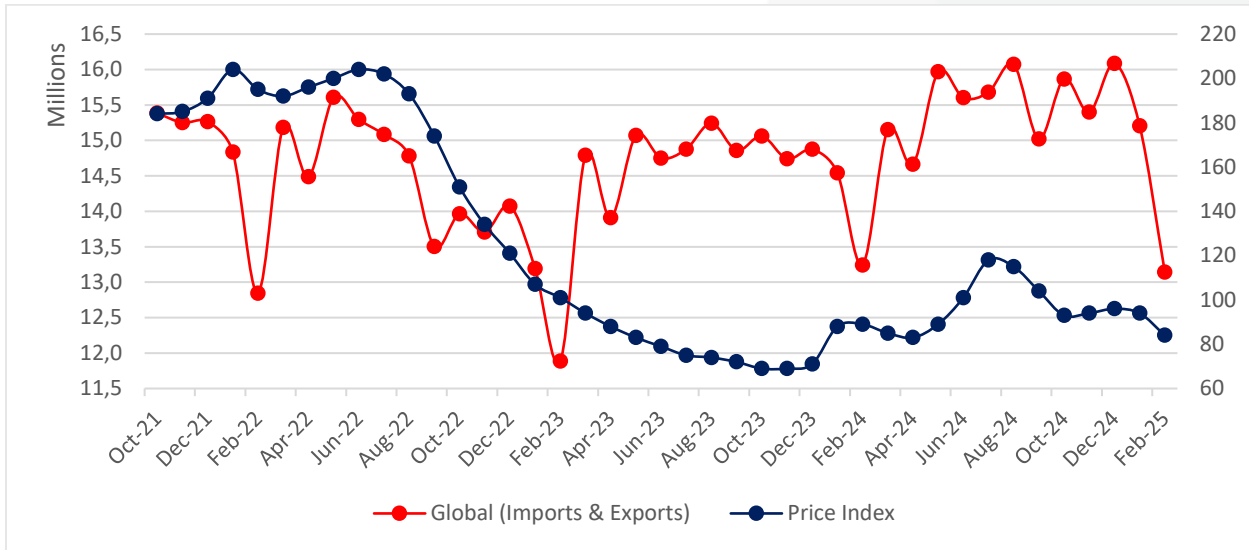
While this presents short-term cost relief for importers in some lanes, it also introduces volatility and capacity constraints that may complicate procurement and supply chain strategies into the second half of 2025.

b. Global shipping industry

i. Global container trade statistics – February

The latest container throughput figures for February from *Container Trade Statistics* (CTS) show that container volume has experienced its typical cyclical lull to Chinese New Year, as global throughput to February decreased by **↓13,6%** (m/m). More importantly and more indicative of the cyclical flow, is the fact that throughput is down by **↓0,7%** (y/y) annually. Most trade lanes experienced significant decreases in February, with Far East exports the most significant at **↓22,6%** (m/m). Similar to the ongoing observations in the container spot rates, the global price index (dry and reefer combined) decreased in February by **↓10,6%** monthly and **↓5,6%** yearly. The following figure illustrates the global container throughput and price index since October 2021:

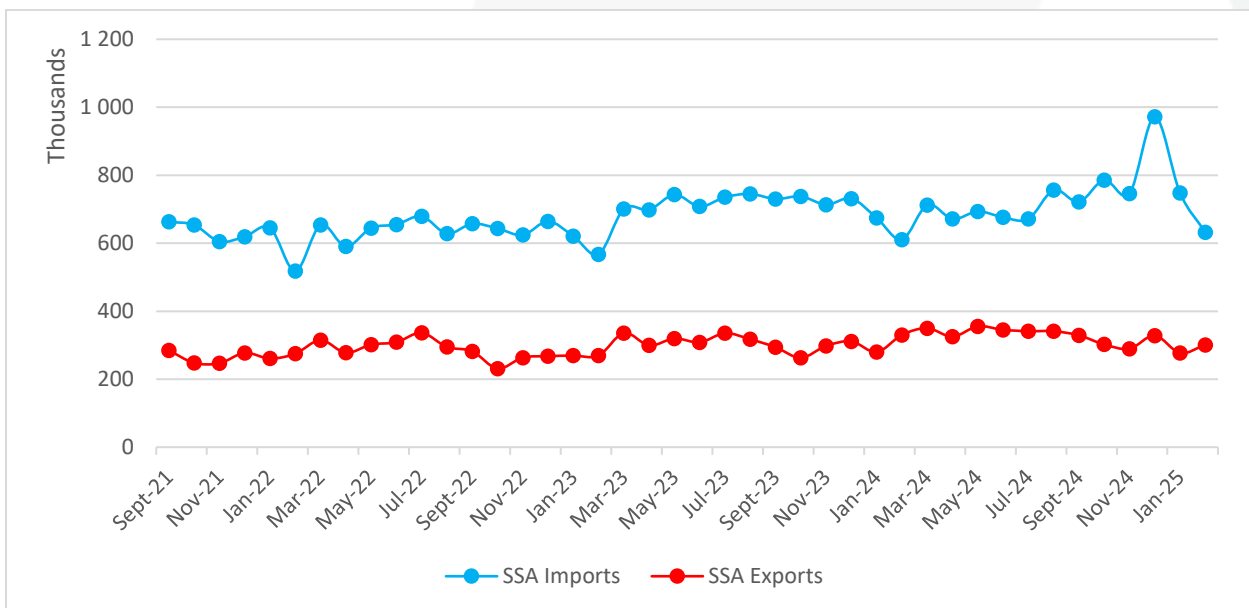
Figure 18 – Global Containerised Throughput (TEUs) and price index



Source: Calculated from [CTS](#)

Container throughput in February reached **13,1 million TEUs** – some **100 000 containers** below the level of February 2024, indicating some contraction in the global market. The following figure shows Sub-Saharan African trade over the same period, with a **↓15,5% (m/m)** decrease in containers imported, but an impressive (world-best) **↑8,6% (m/m)** growth in containers exported:

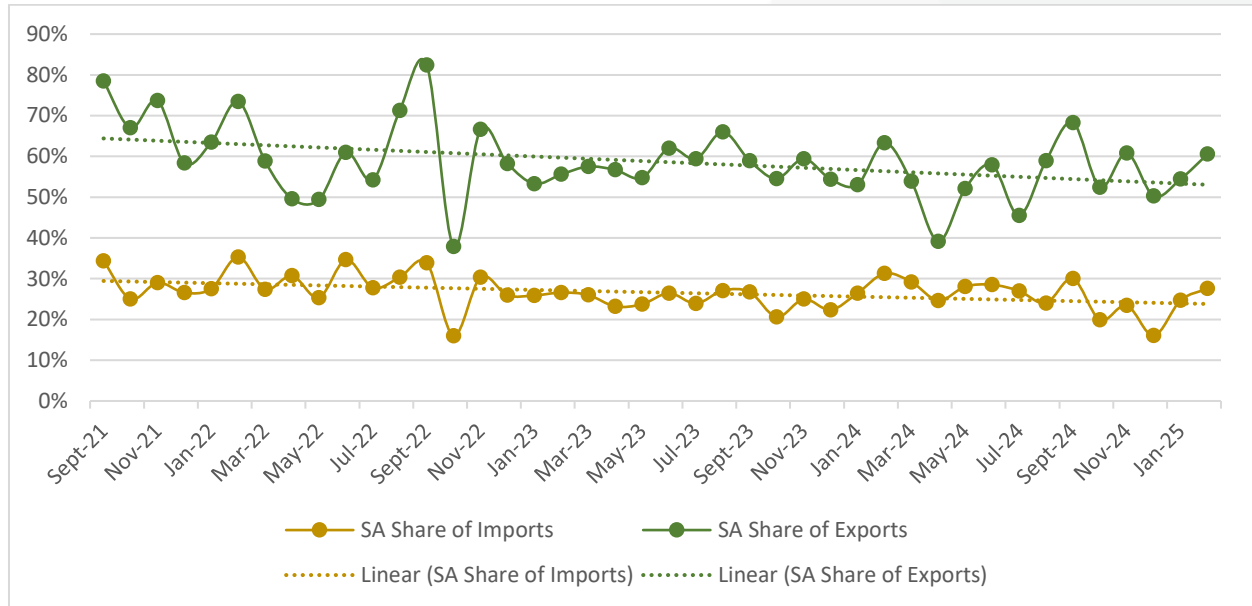
Figure 19 – Sub-Saharan Africa Containerised Throughput (TEUs)



Source: Calculated from [CTS](#)

Yearly SSA imports are also up (**↑3,5%, y/y**) – with exports down by **↓8,9% (y/y)**. When adding South Africa’s share to SSA trade, we see a continuation of the general flow, as Transnet registered some average throughput numbers in February (**356 612 TEUs**):

Figure 20 – South Africa's share in regional containerised throughput (% share)



Source: Calculated from [CTS](#)

When measuring these, South Africa accounted for approximately **28%** of SSA imports and **61%** of SSA exports in February, according to TNPA figures. These respective shares are significantly less than the highs of **35%** in February 2022 for imports and **82%** in September 2022 for exports. Despite the slight bounce-back since December (which is encouraging), South Africa’s regional share has continued to dwindle in recent years, which shows the urgent need for decisive interventions in our logistics sector. Tackling persistent inefficiencies across the port and rail systems, strengthening infrastructure through effective public-private collaboration, and driving momentum on the Freight Logistics Roadmap remain critical imperatives. Without decisive and sustained action, South Africa faces deepening exclusion from regional trade flows, with far-reaching consequences for our competitiveness and long-term economic trajectory.

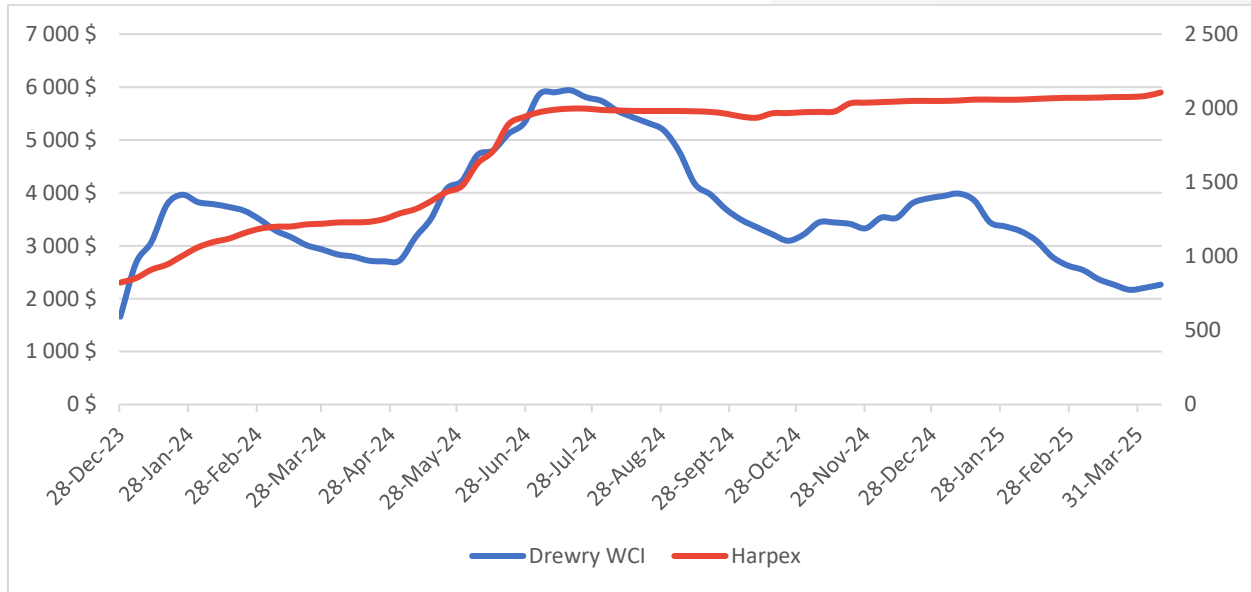
ii. Global freight rates

This week, Drewry's "World Container Index" increased by **↑2,6%** (or **\$57**) to **\$2 265 per 40-ft container**⁹, marking a **↑78%** decrease from its September 2021 peak of **\$10 377** but remaining **59%** above the 2019 pre-pandemic average of **\$1 420**. Year-to-date, the composite index averages **\$2 944**, slightly surpassing the 10-year average of **\$2 889**, which includes the elevated rates during the COVID-19 period. Notable rate increases were observed on key routes: Shanghai to Rotterdam rose **↑4%** to **\$2 392**, Shanghai to Los Angeles increased **↑3%** to **\$2 815**, and Shanghai to New York climbed **↑2%** to **\$3 976** per 40ft container. Meanwhile, charter rates increased again, as the *Harper Petersen Index* (Harpex) traded around **2 106 points** (**↑71%**, y/y) on Friday.¹⁰ The following figure illustrates the divergent trajectory of these two indices since the end of 2023:

⁹ Drewry. 10/04/2025. [World Container Index](#).

¹⁰ Harpex. 11/04/2025. [Harper Petersen & Co Charter Rate Index](#).

Figure 21 – World Container Index (\$ per 40ft) and Harpex Charter Index

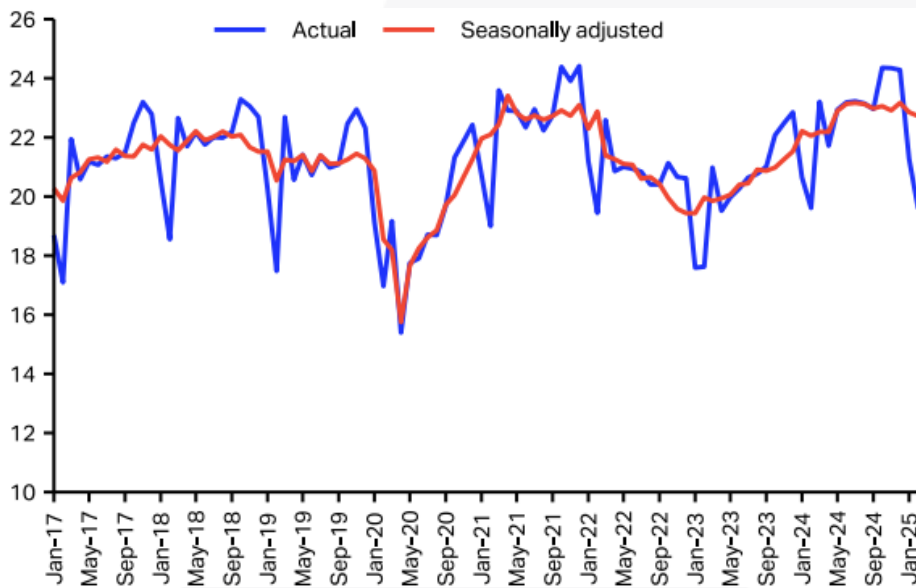


Source: Calculated from [Drewry](#) and [Harpex](#)

c. Global air cargo industry

According to IATA’s latest “Air Cargo Market Analysis”, global air cargo demand softened in February 2025, with cargo tonne-kilometres (CTKs) down **↓0,1%** year-on-year (y/y)—the first y/y decline since mid-2023. Adjusted for seasonality (and the leap year effect), demand remained **↑3,0%** higher than February 2024. On a month-on-month basis, CTKs declined by **↓0,6%**, signalling a slowdown after the post-holiday period peak. International CTK volumes rose modestly by **↑0,4%** (y/y), with Asia Pacific carriers leading growth at **↑5,5%**, followed by Latin America (**↑4,6%**) and North America (**↑3,0%**). In contrast, demand contracted sharply for Middle Eastern (**↓11,9%**) and African (**↓5,7%**) carriers. Traffic within Asia surged by **↑9%**, making it the fastest-growing regional trade lane.

Figure 22 – Global air cargo industry CTK (billions)



Source: [IATA](#)

On the supply side, global air cargo capacity (ACTK) decreased by **↓0,4%** (y/y), while the Cargo Load Factor (CLF) edged up by **↑0,1%** to **45,0%**. Meanwhile, air cargo yields declined **↓6,1%** (m/m), reaching their lowest level in 12 months, despite a drop in jet fuel prices.

In the high-frequency metrics, global air cargo tonnages declined sharply by **↓7%** week-on-week (w/w), driven by seasonal Eid-related slowdowns and growing uncertainty over new US tariffs and trade policies, particularly affecting flows from China and Hong Kong. This marks an acceleration of the downward trend seen since late March. Despite this, total volumes remain **↑6%** higher year-on-year (y/y).

Capacity reductions were most pronounced in the Middle East and South Asia (**↓24%**) and Africa (**↓21%**), with notable drops also seen from Asia Pacific (**↓7%**) and Latin America (**↓4%**). Tonnage fell sharply from key Eid-affected countries, including Pakistan, Egypt, and Indonesia.

Figure 23 – 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	-2%	+2%	-9%	+5%	+1%	+8%			
Asia Pacific	-0%	+1%	-5%	+8%	+6%	+6%			
C. & S. America	+0%	-2%	+5%	+15%	-3%	-3%			
Europe	+5%	+3%	-4%	+9%	+1%	+2%			
M. East & S. Asia	+2%	+3%	-8%	-11%	+6%	-8%			
North America	-1%	-1%	-3%	+9%	+0%	-1%			
Worldwide	+1%	+1%	-4%	+7%	+3%	+2%			

Source: [World ACD](#)

In contrast, average global air cargo rates continued to rise by **↑2%** (w/w) and **↑3%** (y/y). Spot rates reached **\$2,73/kg**, the highest in 2025 so far, while overall average rates hit **\$2,52/kg**. Asia Pacific routes, particularly to the US, saw rate hikes despite softening demand—spot rates rose **↑5%** to **\$3,94/kg**.

ENDS¹¹

¹¹ACKNOWLEDGEMENT:

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