

# Cargo Movement Update #233<sup>1</sup>

**Date: 11 May 2025**

## Weekly Snapshot

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

Flows	Current <sup>2</sup>			Previous <sup>3</sup>			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	32 111	36 583	<b>68 694</b>	38 356	43 698	<b>82 054</b>	<b>↓16%</b>
Air Cargo (tons)	3 623	2 005	<b>5 628</b>	3 267	2 082	<b>5 349</b>	<b>↑5%</b>

## Monthly Snapshot

Figure 1 – Cyclical<sup>4</sup> monthly cargo volume, year on year (most metrics: Mar '24 vs Mar '25, % growth)

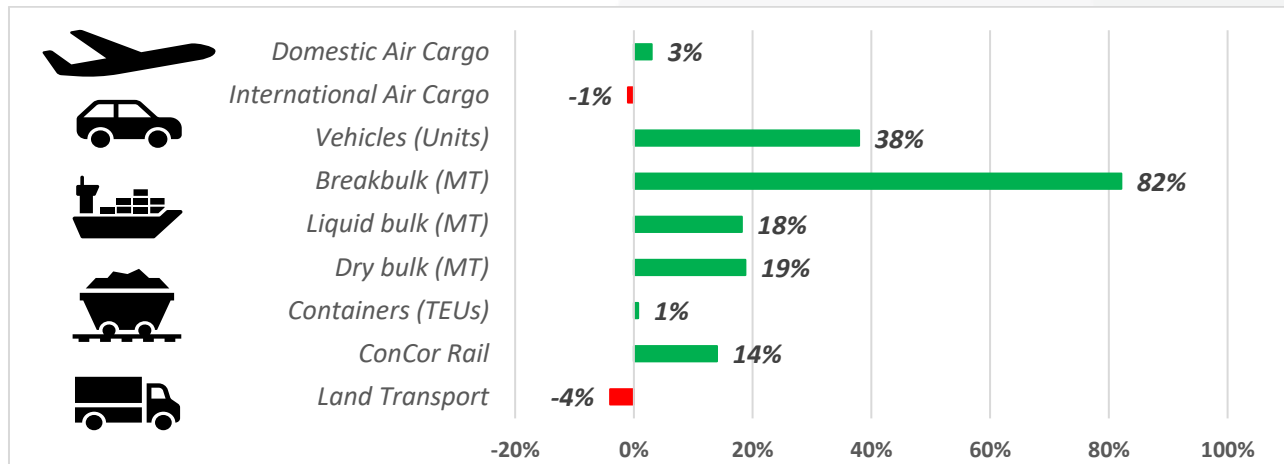
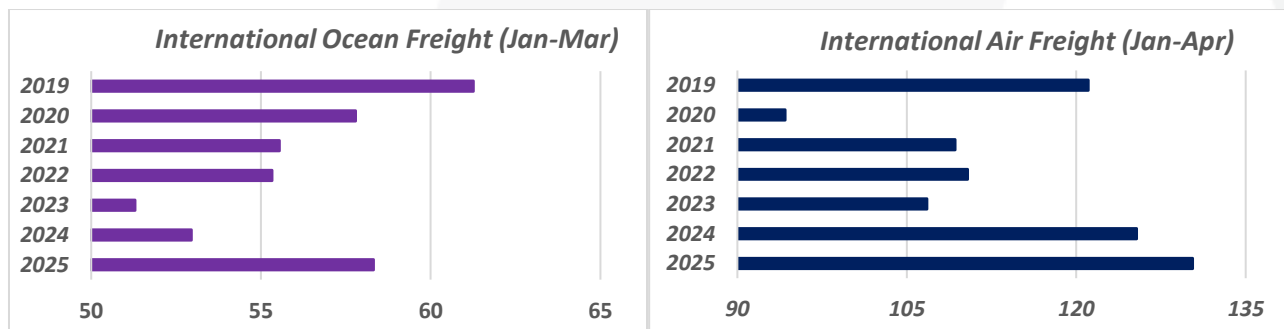


Figure 2 – Year-to-date flows 2019-2025<sup>5</sup>: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



## Key Notes

- An average of **~9 813 TEUs** was handled per day, with **~12 494 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 041** containers, up by **↑58%** from last week.
- Cross-border queue: **↓1,5 hrs**; transit: **↓1,5 hrs**; SA borders: **7,9 hrs (↓7%)**; SADC: **4,7 hrs (no change)**.
- The US and China have agreed to temporarily reduce tariffs on each other's goods for 90 days.
- Global spot rates dropped by a less-pronounced **↓0,7%** (or **\$15**) to **\$2 076/40'**; charter rates: **↓0,7%**.
- Global air cargo shipments rose **↑2,4%** in Q1'25 compared to last year, reaching a record **65 billion CTK**.

<sup>1</sup> This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 233<sup>rd</sup> update.

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

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

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

<sup>5</sup> Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

## Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **9 813 TEUs** was handled daily, significantly decreasing from **11 722 TEUs** the previous week. Port Operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages. Adverse weather conditions ensured operational disruptions at the Port of Cape Town. In contrast, the main operational constraints in Durban proved to be continuous equipment breakdowns and a hook-up on a rail corridor. System challenges and vacant berths mainly impacted operations at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. Due to maintenance operations, Berth IV8 at the Island View precinct was out of commission between 7 and 9 May. The latest reports from TNPA suggest there remains a deadlock in negotiations between Transnet and UNTU and that no strike has been confirmed yet. The latest reports from TFR suggest that the rail line near Mafikeng (Central Corridor) was out of commission this week and will remain closed until 12 May due to the annual shutdown of the line. Additionally, two cable theft incidents occurred on the line between Durban and Pietermaritzburg between Thursday and Friday, with each incident resulting in a delay of six hours.

Global shipping markets were buoyed by a surprise 90-day tariff truce between the US and China, which sharply reduced tariffs and is expected to trigger a major spike in Trans-Pacific trade volumes, particularly during the summer peak season. Freight rates to the US West Coast could exceed **\$3 500/FEU**, with spillover effects across other routes due to vessel capacity shifts. Despite a mild decline in *Drewry's World Container Index* this week, a rate rebound is anticipated. However, charter markets remain under pressure, with large vessel charter rates continuing to decline amid lingering uncertainty. LNG-fuelled vessels now dominate the global orderbook in the shipbuilding sector, with over **56%** of new capacity favouring cleaner fuel options, especially among ships over **10 000 TEU**. Methanol-powered ships also show growth. Nonetheless, scrubber systems remain widespread in the operating fleet, underlining a transitional phase in response to tightening emissions regulations.

After two weeks of reductions, international air cargo to and from South Africa rebounded and increased somewhat this week, led by inbound cargo. Despite the slight rebound, the current volumes remain slightly down on last year's levels (**↓1%**, y/y) and significantly below the comparative levels of pre-pandemic 2019 (**↓18%**). In April, international air cargo volumes declined month-on-month at Johannesburg (**↓7%**) and Cape Town (**↓22%**) but grew strongly year-on-year by **↑3%** and **↑34%** respectively, while Durban recorded notable increases both month-on-month (**↑33%**) and year-on-year (**↑50%**) compared to 2024. Domestically, April volumes rose month-on-month at Johannesburg (**↑20%**) and Cape Town (**↑3%**), with Cape Town also showing strong year-on-year growth (**↑28%**), while Johannesburg declined year-on-year (**↓12%**) and Durban recorded decreases both month-on-month (**↓9%**) and year-on-year (**↓2%**) compared to 2024.

Globally, despite record volumes in Q1, adjusted for seasonal patterns, total air cargo volumes fell **↓1,1%** from Q4 2024, marking the second consecutive decline after the drop of **↓0,2%** (q/q) in Q4 2024. In the high-frequency metrics, global air cargo tonnages fell by **↓3%** (w/w), driven largely by an **↓11%** drop from Asia Pacific, exacerbated by China's Labour Day and Japan's Golden Week. Africa's tonnages remained flat.

Cargo flows across the Lebombo Border Post and N4 Corridor have increased slightly this week (across both road and rail), with truck volumes at **1 483 HGVs per day** (**↑10%**, w/w). There was a reduced average of **2,3 hours'** (**↓4%**) worth of queuing time at the border, as the average processing time was steady at around **2,2**

**hours (no change)** per crossing. The rail to Maputo was stable at an average of **seven trains daily**. Sugar trains from Eswatini increased to around **two trains a day**.

Crossing times decreased at several borders this week, notably in South Africa and at some busy borders. Overall, the average queue times decreased by around **an hour and a half** from last week, as transit times decreased by around the same magnitude. The median border crossing times at South African borders decreased by **half an hour**, averaging **~7,9 hrs (↓32%)** for the week. In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs (no change)**. On average, two SADC borders took around a day to cross last week, namely Chirundu OSBP and Kasumbalesa (the worst affected, with an average of **a day and a quarter** from **both the Zambian and DRC sides**). Other developments include **(1)** Lebombo tanker convoys to combat smuggling, **(2)** downtime on the Beitbridge border post, **(3)** strengthening of Kenya-China relations (including several trade, transport, and logistics-related), and **(4)** Tanzania-Burundi rail project update.

In summarising this week's report, the legislative change announced in Notice 6 182 of Government Gazette No. 52 624 (8 May 2025), introducing a Block Exemption for Ports, Rail, and Key Feeder Road Corridors, marks a pivotal moment in aligning South Africa's port governance with market-orientated principles and enabling performance-driven reform.<sup>6</sup> The introduction of a Container User Group Forum—akin to existing commodity-specific platforms—establishes a much-needed mechanism for structured stakeholder coordination, transparency, and collective problem-solving. This collaborative framework will play a vital role in re-establishing South Africa as the regional logistics hub for Sub-Saharan Africa (since we've lost significant connectivity and capacity in the last two years), improving service reliability and reducing costs for shippers. Moreover, by fostering competitive pressures both within and across ports, the reform incentivises operational efficiency gains, with a realistic ambition of reaching average crane productivity levels of upwards of 25 gross container moves per hour (GCH – above the global average of ~24). Additionally, the exemption unlocks private sector participation and investment in port infrastructure and related landslide equipment, a critical enabler of long-term modal integration and supply chain resilience. If implemented with discipline and accountability, the legislative change could significantly improve port throughput, drive down total economic costs, and restore confidence in the South African logistics network, especially our linkages with the regional trades.

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<sup>6</sup> Specifically, the Block Exemption allows for legally sanctioned collaboration between competitors across the ports, rail, and key feeder road corridors, enabling joint planning, data sharing, and coordinated investment without breaching competition law. This paves the way for container users and logistics providers to jointly address systemic inefficiencies, align infrastructure planning, and unlock integrated corridor performance improvements.

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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 Monday to Sunday.

Table 2 – Container Ports – Weekly flow reported for 5 to 11 May (measured in TEUs)

7-day flow reported (05/05/2025 – 11/05/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 648	32 539	↓1%
New Pier (Pier 1)	1 765	12 356	↓20%
Cape Town Container Terminal	2 150	15 050	↑2%
Ngqura Container Terminal	633	4 433	↓62%
Port Elizabeth Container Terminal	143	1 002	↓62%
Other	473	3 314	↓31%
<b>Total</b>	<b>9 813</b>	<b>68 694</b>	<b>↓16%</b>

Source: Calculated from TPT, 2025. Updated 11/05/2025.

A significantly decreased average of ~9 813 TEUs (↓16%) was handled per day for the last week (5 to 11 May, Table 2), way below the projected average of ~12 494 TEUs (↓21% actual versus projected).

For the coming week, an increased average of ~12 494 TEUs (↑27%) is predicted to be handled (12 to 18 May, Table 3). Port Operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages.

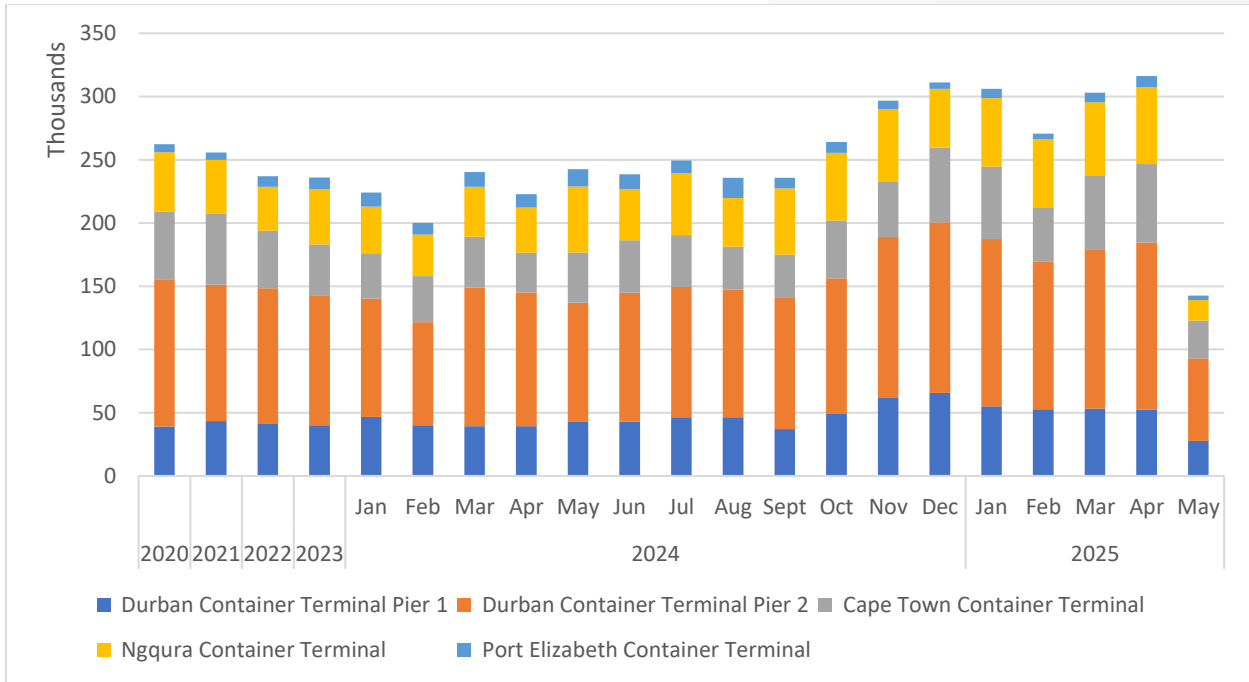
Table 3 – Container Ports – Weekly flow projected for 12 to 18 May (measured in TEUs)

7-day flow projected (12/05/2025 – 18/05/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 258	36 806	↑13%
New Pier (Pier 1)	2 016	14 109	↑14%
Cape Town Container Terminal	1 755	12 283	↓18%
Ngqura Container Terminal	2 059	14 414	↑225%
Port Elizabeth Container Terminal	454	3 178	↑217%
Other	952	6 667	↑226%
<b>Total</b>	<b>12 494</b>	<b>87 457</b>	<b>↑27%</b>

Source: Calculated from TPT, 2025. Updated 11/05/2025.

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.

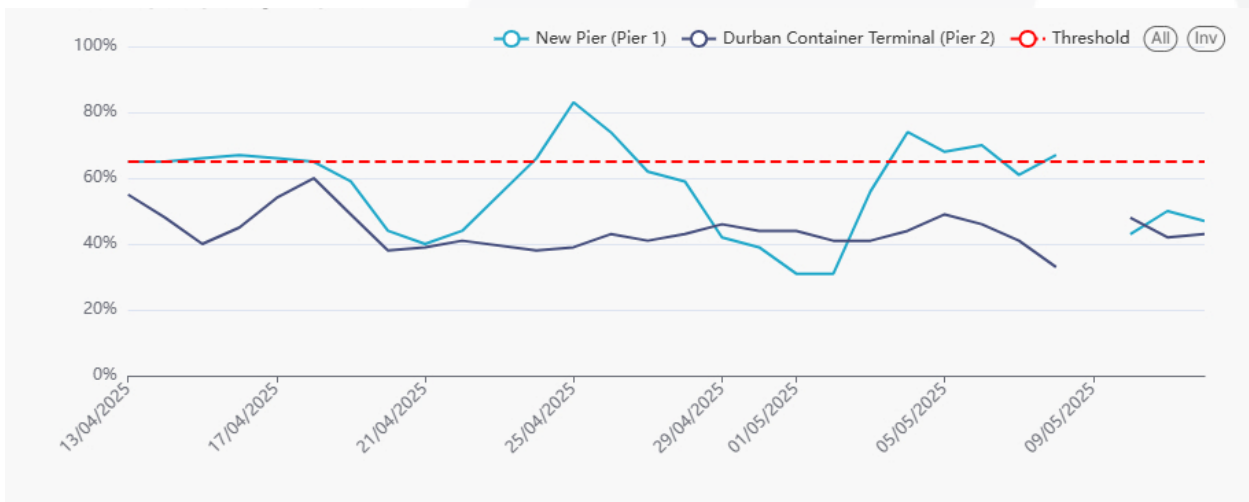
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 11/05/2025.

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

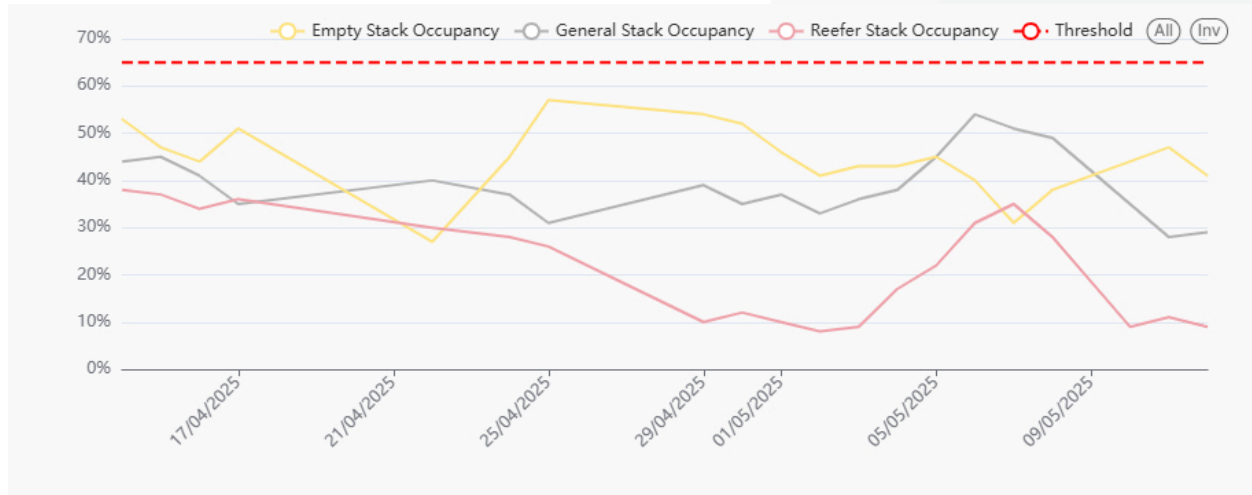
Figure 4 – Stack occupancy in DCT, general-purpose containers (13 April to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 11/05/2025.

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 April to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 11/05/2025.

**b. Summary of port operations**

**i. Weather and other delays**

- Adverse weather conditions ensured operational disruptions at the Port of Cape Town.
- The main operational constraints in Durban proved to be continuous equipment breakdowns and a hook-up on a rail corridor.
- System challenges and vacant berths mainly impacted our Eastern Cape Ports operations.
- Minimal delays were reported at the Port of Richards Bay.

**ii. Cape Town**

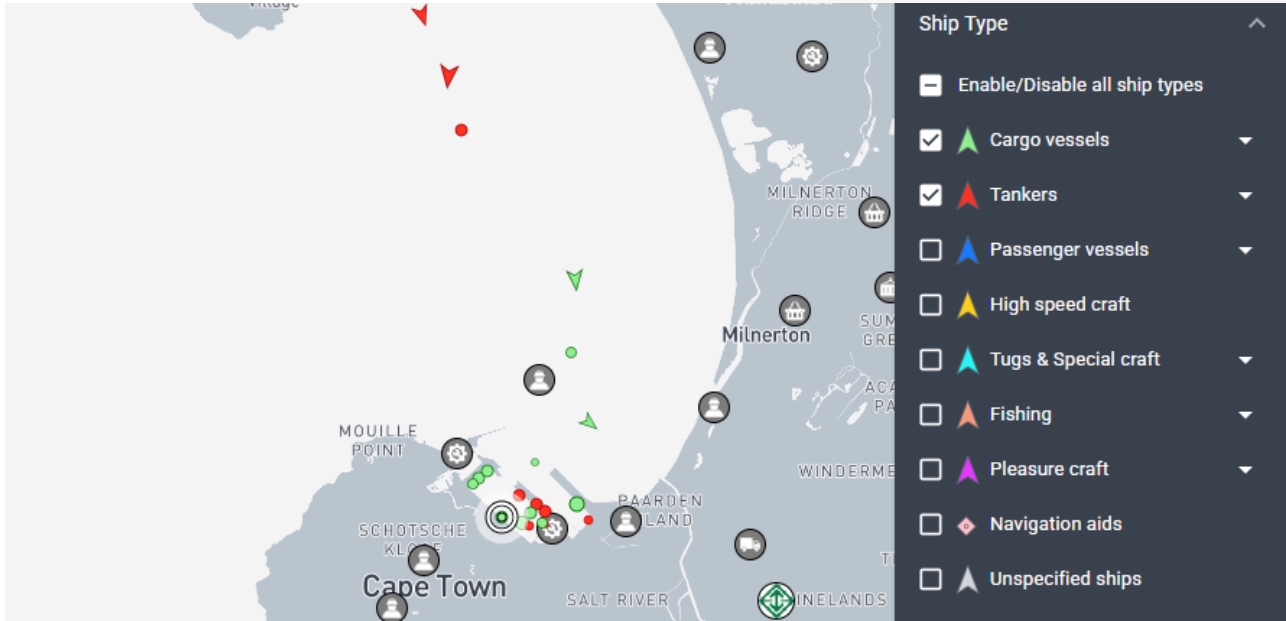
On Thursday, CTCT recorded three vessels at berth and one at anchor, as adverse weather conditions proved to be the primary operational constraint. The terminal went windbound on Friday evening, with the strong winds persisting through to Saturday. On the landside, between Monday and Friday, the terminal managed to service at least 6 518 trucks while handling approximately 207 rail units. On the waterside, the terminal executed approximately 6 264 container moves across the quay between Monday and Thursday. Stack occupancy for **GP containers was recorded at 49%, reefers at 28%, and empties at 38%**. Additionally, the terminal operated with **eight STS cranes, 19 RTGs, and 57 hauliers** towards the end of the week. The latest reports suggest that Crane LC1 returned to operations this week, with Crane LC3 expected to go out of service until around 30 May.

On Thursday, CTMPT recorded one vessel at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 148 container moves across the quay on the waterside. On the landside, 48 trucks were processed during the same period. Stack occupancy was recorded at 14% for general cargo, 30% for reefers, and 3% for empties. Towards the end of the week, the terminal operated with three cranes and four straddle carriers. The technical team, however, did briefly take Crane LM550 out of commission to fix a spreader issue on the machine.

Between 28 April and 4 May, the FPT terminal handled ten vessels: three multi-cargo, two container vessels, two dry bulk, one vessel carrying steel, and two layby vessels. Berth occupancy during this period was recorded at 71%. The terminal planned to handle seven more vessels between 05 and 11 May, with another

five vessels scheduled between 12 and 18 May. Adverse weather conditions and 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 12/05/2025 at 14:00.

### iii. Durban

On Friday, Pier 1 recorded one vessel on berth, operated by three gangs, with one vessel at anchor. Stack occupancy was **57% for GP containers**. Between Monday and Friday, the terminal executed at least 5 810 gate moves and 401 rail moves on the landside. The **average TTT** for the week was **~81 minutes (↑1%, w/w)** and an average **staging time** of **~58 minutes (↑7%)**. Additionally, the terminal moved over 6 400 TEUs across the quay on the waterside during the same period. The terminal had **six STS cranes** and **13 RTGs** available towards the end of the week.

Pier 2 had four vessels on berth and zero at anchorage on Friday, as equipment breakdowns and a rail hook-up prevented optimal operational performance this week. Stack occupancy was recorded at **47% for GP containers** and **18% for reefers**. The terminal operated with **ten gangs** and moved over 14 800 containers across the quay between Monday and Friday on the waterside. Approximately 12 221 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~64 minutes (↓11%, w/w)** and staging time of **~47 minutes (no change)**. Approximately 979 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **68** and **71** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **79%** during this period.

Durban's MPT terminal recorded one vessel at berth on Friday and none at outer anchorage. Stack occupancy for containers was recorded at 25%, with the breakbulk stack at 10%. In the preceding 24 hours, the terminal handled 507 containers on the waterside. On the landside, 148 container trucks and 29 breakbulk RMTs were serviced. During this period, two cranes, nine reach stackers, seven forklifts, and 20 ERFs were in operation. The latest reports suggest that the part sourced from Australia for the repairs of the third crane is only anticipated to arrive around 17 May. TPT is exploring all avenues to ensure that the part arrives sooner so that the repairs on the machine can commence.

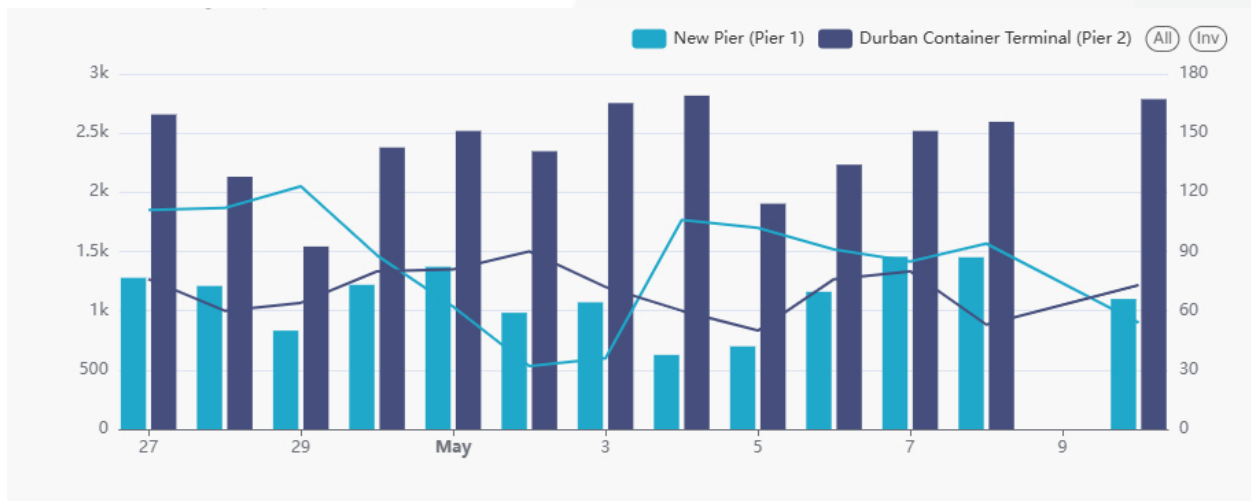
Between Wednesday and Thursday, the Maydon Wharf MPT recorded one vessel at berth but none at anchorage. On the waterside, the terminal managed to handle 3 951 tons, one truck and 12 rail wagons, containing approximately 630 tons, were serviced on the landside. During the same period, the agri-bulk facility recorded zero vessels at berth or at anchor. The next vessel destined for the terminal is expected to arrive towards the end of the month.

On Friday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with none at anchorage. In the preceding 24 hours, the terminal handled 1 448 road- and 159 rail units on the landside and 860 units on the waterside. Overall stack occupancy was 65%, 90% at Q&R, and 50% at G-berth. During this period, the terminal had 175 high-and-heavy (abnormal loads) on hand and managed to handle 58.

Due to maintenance operations, Berth IV8 at the Island View precinct was out of commission between 7 and 9 May.

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.

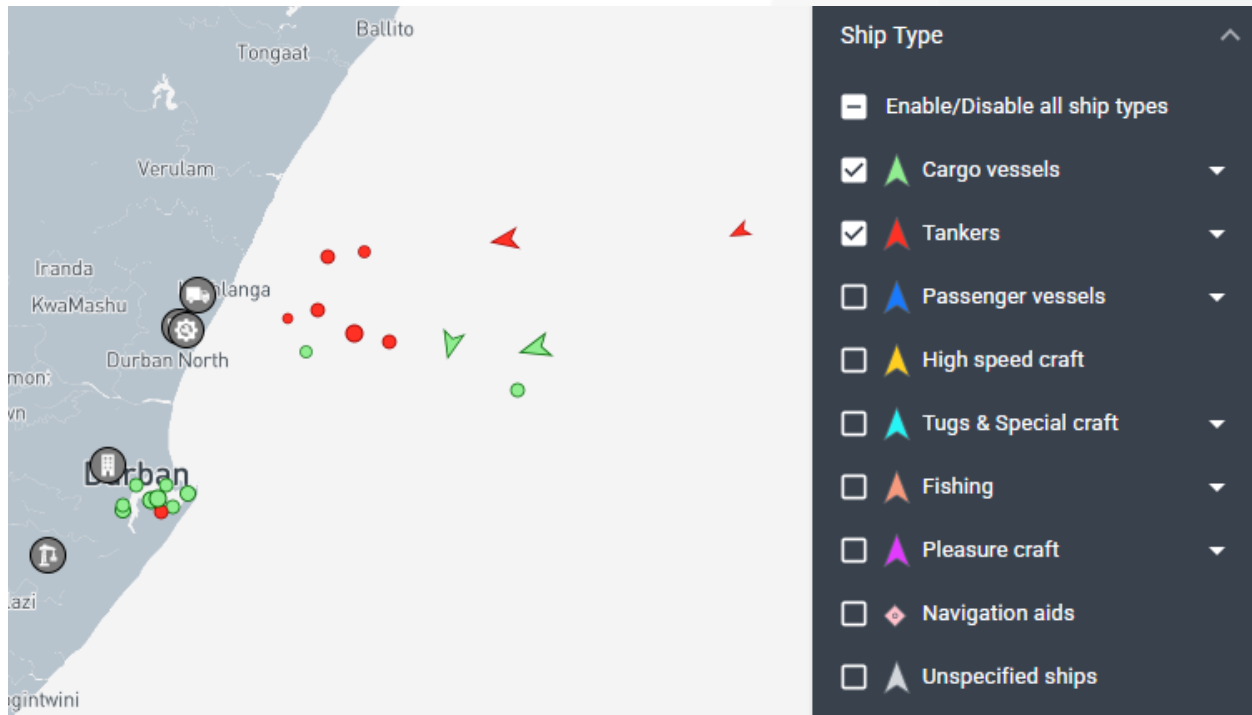
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 11/05/2025.

The queue of container vessels waiting outside Durban has stayed steady from last week. On Monday evening (12 May), **one** container vessel was waiting outside at anchorage for Pier 1, and **one** for Point 2. The queue of dry (**two**), liquid (**nine**), and breakbulk (**one**) vessels has also remained relatively similar from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 12/05/2025 at 14:00.

**iv. Richards Bay**

On Monday (12 May), the Port of Richards Bay had 22 vessels at anchor and 14 on the berth, translating to four vessels at DBT, four at MPT, four at RBCT, and two at the liquid bulk terminal. Two tugs and one pilot boat operated for marine resources towards the end of the week. The helicopter went out of commission last week for a service and is expected to return to operations around 14 May. The daily average for the week increased again to around **177 900 tons** (↑45%, w/w). An average of **19 trains** (down by two from last week) were serviced on the landside, slightly below the target of 22.

Lastly, on Richards Bay, Transnet has announced preferred bidders for the **R17 billion development** of fuel terminals at Richards Bay, aiming to enhance South Africa's fuel import and export capabilities. This strategic initiative is part of Transnet's broader plan to modernise port infrastructure and improve energy security.<sup>7</sup>

**v. Eastern Cape ports**

On Friday, NCT recorded one vessel on berth and none at anchor, with zero vessels 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 23% for reefers, 26% for reefer ground slots, and 8% for the general stack. Despite having vacant berths throughout the week, the terminal handled approximately 1 449 TEUs and 101 reefers on the waterside. Approximately 396 trucks were processed on the landside at a TTT of ~25 minutes. Towards the end of the week, the terminal had two STS cranes, 22 RTGs, and 25 hauliers in service.

<sup>7</sup> Steyn, L. 08/05/2025. [Transnet announces preferred bidders for R17bn Richards Bay fuel terminals development.](#)

The latest reports from Maersk suggest that the Santa Clara and Santa Rita plan to call Port Elizabeth (Coega – NCT) northbound after Durban before proceeding to Cape Town. Their onward schedule to Cape Town and Europe remains unchanged. The same reports suggest that Maersk is temporarily suspending booking amendments to Johannesburg as the empty pick-up depot for 20’ GP containers, due to low availability.

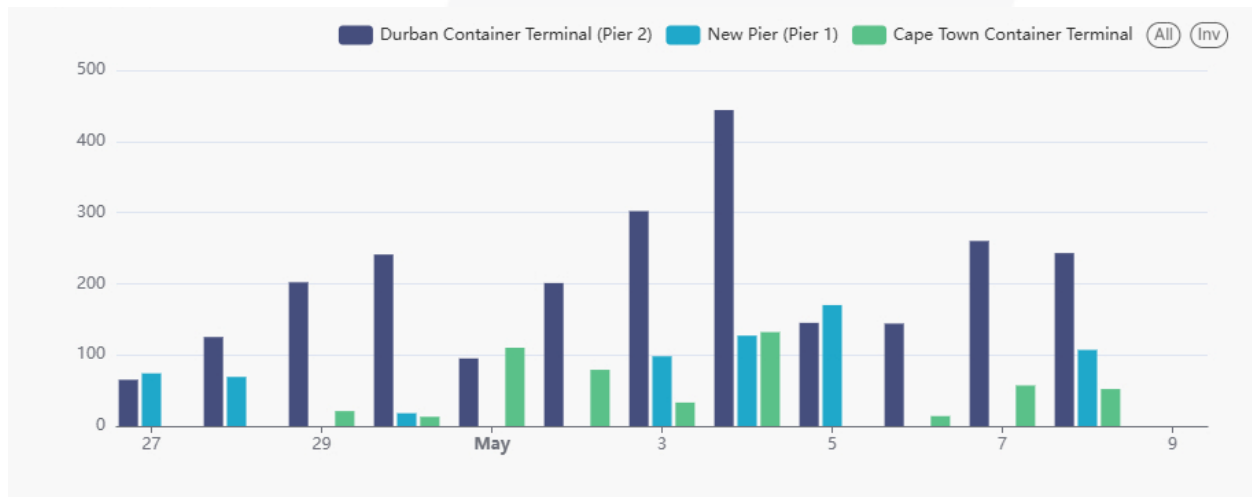
On Thursday, GCT had zero vessels at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 171 trucks were processed at a TTT of ~40 minutes on the landside, while 516 TEUs and eight reefers were handled across the quay on the waterside. Stack occupancy was recorded at 31% for the general stack, 33% for reefers, and 27% for reefer ground slots.

On Friday, the Ro-Ro terminal had zero vessels on berth and none at outer anchorage. The next vessel is scheduled to arrive on 14 May. Stack occupancy was recorded at 0% during this period.

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

The latest reports from TFR suggest that trains were moving slowly on the line between Durban and Pietermaritzburg this week after the derailment, which caused some congestion on the line. Diesel hauling is still taking place on the line between Johannesburg and Pretoria after the intermittent cable theft and power outages over the last few weeks. The rail line near Mafikeng (Central Corridor) was out of commission this week and will remain closed until 12 May due to the annual shutdown of the line. Additionally, a hook-up occurred on the line between Bela-Bela and Durban between Wednesday and Thursday, which impacted operations at DCT. Finally, two cable theft incidents occurred on the line between Durban and Pietermaritzburg between Thursday and Friday, with each incident resulting in a delay of six hours. Towards the end of the week, DCT Pier 2 had 721 ConCor units on hand with a dwell time of 6 days and 354 over-border units with a dwell time of 84 days.

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



Source: Calculated using data from Transnet, 2024. Updated 11/05/2025.

In the last week (5 to 11 May), rail cargo on the ConCor line out of Durban was reported at **3 041** containers, up **↑58%** from the previous week’s **1 922** containers.

**vii. General**

The latest reports from TNPA suggest that there remains a deadlock in negotiations between Transnet and UNTU. No strike has been confirmed yet.

## 2. Air Cargo Update

### a. International air cargo

The following table shows the inbound and outbound air cargo flows to and from ORTIA for the week beginning 28 April. 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	28-Apr	29-Apr	30-Apr	01-May	02-May	03-May	04-May	Week
Volume inbound	393 900	218 714	862 334	296 939	386 572	306 878	1 157 639	3 622 976
Volume outbound	78 357	126 768	384 903	168 724	148 278	164 215	933 937	2 005 182
Total	472 257	345 482	1 247 237	465 663	534 850	471 093	2 091 576	5 628 158

Courtesy of ACOC. Updated: 11/05/2025.

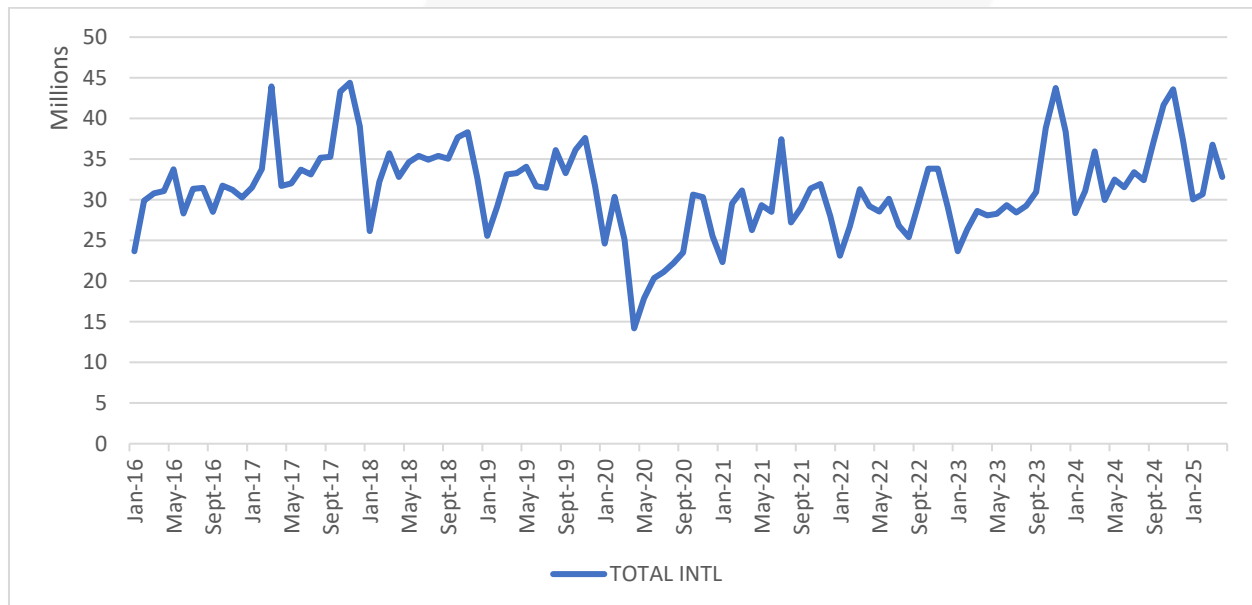
In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **517 568 kg** inbound (**↑11%**, w/w) and **286 455 kg** outbound (**↓4%**). Despite the slight rebound, the current volumes remain slightly down on last year’s levels (**↓1%**, y/y) and significantly below the comparative levels of pre-pandemic 2019 (**↓18%**).

For the full month of April:

- Johannesburg decreased by **↓7%** (m/m) versus March, but increased by **↑3%** (y/y) versus 2024.
- Cape Town decreased by **↓22%** (m/m), but increased by **↑34%** (y/y) versus 2024.
- Durban increased by **↑33%** (m/m) and a significant **↑50%** (y/y) compared to 2024.

The following figure shows the international air cargo flows to and from South Africa (all airports) since the start of 2016:

Figure 10 – International cargo for all airports – volumes per month (kg millions)



Calculated from ACOC. Updated: 11/05/2025.

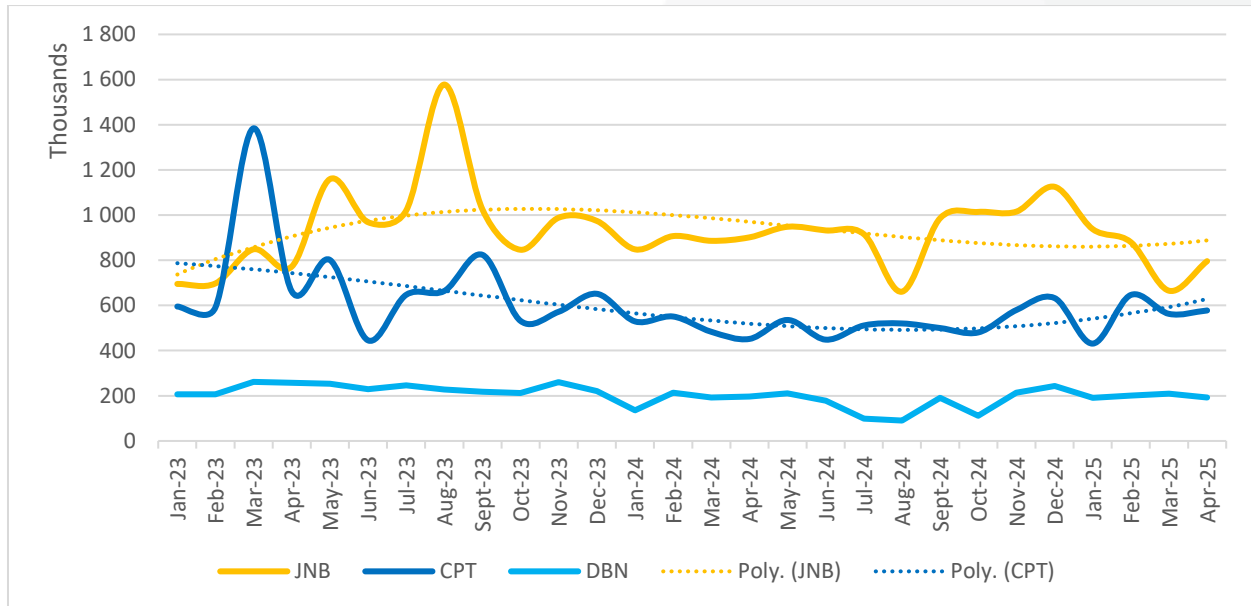
### b. Domestic air cargo

For the full month of April, domestic volumes handled at our three main terminals indicate the following:

- Johannesburg increased by **↑20%** (m/m) versus March, but is down by **↓12%** (y/y) versus 2024.
- Cape Town increased by **↑3%** (m/m), and by **↑28%** (y/y) versus 2024.
- Durban decreased by **↓9%** (m/m) and **↓2%** (y/y) compared to 2024.

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 11/05/2025.

## 3. Road and Regional Update

### a. Lebombo border post update

In the last week (5 to 11 May), cargo movements (road and rail) along the N4 corridor increased significantly, close to the design capacity, which is encouraging. The following notes summarise the recent developments:

- Truck volumes at **1 483 HGVs per day (↑10%, w/w)**.
- There was a reduced average of **2,3 hours' (↓4%)** worth of queuing time at the border, as the average processing time was steady at around **2,2 hours (no change)** per crossing.
- The rail to Maputo was stable at an average of **seven trains daily**.
- Sugar trains from Eswatini increased to around **two trains a day**.
- Lastly, reports of new security measures implemented for fuel tankers to combat smuggling were received. Tankers were grouped into two convoys per day, causing some congestion. FESARTA has disputed the claim, citing the use of four telematics-monitored seals per tanker.

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

Table 5 – Lebombo border post update

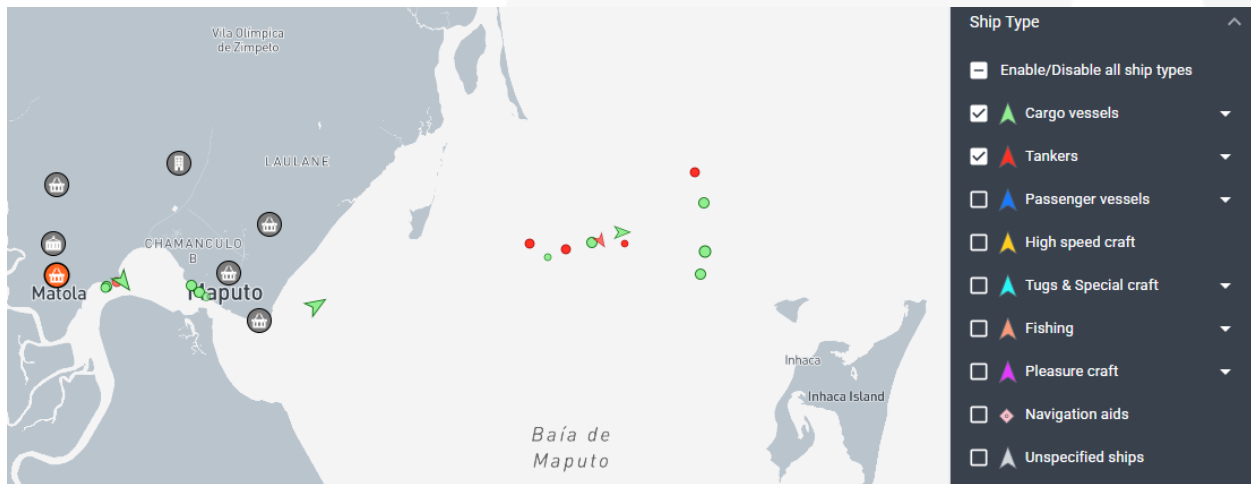
Date 06h00 Daily	Total Trucks Entering KM4	Total Trucks Exit KM4	Mineral Trucks	General Cargo (incl. critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Total Trucks inside KM4 staging	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo
<b>Design Capacity</b>	<b>1 500</b>	<b>1 500</b>	<b>1 200</b>	<b>200</b>	<b>n/a</b>	<b>50</b>	<b>50</b>	<b>2 000</b>	<b>20</b>	<b>10</b>	<b>6</b>	<b>4</b>
05-May-25	1 249	1 166	1 076	71	23	61	10	180	7	6	0	1
06-May-25	1 256	1 172	910	149	51	62	0	198	10	6	*	4
07-May-25	1 635	1 407	1 053	260	51	70	48	227	9	7	1	1
08-May-25	1 527	1 510	1 110	251	63	75	36	214	11	7	1	3
09-May-25	1 652	1 486	1 040	278	68	63	48	252	13	9	2	2
10-May-25	1 523	1 479	1 030	269	60	76	51	322	12	8	2	2
11-May-25	1 537	1 437	1 040	230	39	77	51	308	10	8	*	2
% of design capacity	<b>99%</b>	<b>92%</b>	<b>86%</b>	<b>108%</b>	<b>n/a</b>	<b>138%</b>	<b>70%</b>	<b>12%</b>	<b>51%</b>	<b>73%</b>	<b>20%</b>	<b>54%</b>
% change (d/d)	1%	-3%	1%	-14%	-35%	1%	0%	-4%	-17%	0%	-100%	0%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 11/05/2025.

\* = 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 12/05/2025 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:

- Overall, the average queue times decreased by around **an hour and a half minutes** from last week, as transit times decreased by around the same magnitude.
- The median border crossing times at South African borders decreased by **half an hour**, averaging **~7,9 hrs (↓32%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs (no change)**.

### 1. Zimbabwe (Beitbridge) border:

- a. Planned downtime at the Zimborders Freight SA Gatehouse was scheduled for Tuesday, 13 May, between 01:00 and 04:00.
- b. Traffic will resume once the network cabinet maintenance is complete.
- c. Stakeholders have been formally notified by Acting ZIMRA Regional Manager Josephine Uta.

### 2. Kenya–China Relations:

- a. Strengthened through the signing of 20 bilateral agreements, including:
  - i. the extension of the Standard Gauge Railway (SGR) from Naivasha to the Ugandan border,
  - ii. major upgrades to key freight corridors such as the Nairobi–Nakuru–Mau Summit highway and Eldoret Bypass,
  - iii. the implementation of Phase III of Nairobi’s Intelligent Transport Systems (ITS), and
  - iv. deeper integration into China’s Belt and Road Initiative (BRI) to enhance cross-border logistics and infrastructure connectivity.<sup>8</sup>

### 3. Tanzania–Burundi Infrastructure:

- a. Commencement of Standard Gauge Railway construction to improve regional trade connectivity.
- b. The project is expected to be completed in 72 months, with Chinese firms contracted for the work.

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

Table 6 – Delays<sup>9</sup> summary – South African borders (both directions)

Border Post	Direction	HGV <sup>10</sup> Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	443	22,5	5,5	22,3	13 290	3 101
Beitbridge	Zimbabwe-SA	375	12,2	2,1	12,1	11 250	2 625
Groblersbrug	SA-Botswana	224	16,0	2,2	15,6	6 720	1 568
Martins Drift	Botswana-SA	202	3,2	0,4	3,1	6 060	1 414
Kopfontein	SA-Botswana	151	5,3	1,0	5,2	4 530	1 057
Tlokweng	Botswana-SA	14	0,5	0,2	0,3	420	98
Violsdrift	SA-Namibia	30	3,9	1,3	3,5	900	210
Noordoewer	Namibia-SA	20	2,1	0,5	2,1	600	140
Nakop	SA-Namibia	30	3,9	1,1	3,6	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,4	1,1	600	140
Skilpadshek	SA-Botswana	208	3,1	1,2	3,0	6 240	1 456
Pioneer Gate	Botswana-SA	45	0,0	0,0	0,0	1 350	315
Lebombo	SA-Mozambique	1 163	1,0	0,2	0,6	34 890	8 141
Ressano Garcia	Mozambique-SA	1 350	2,3	0,3	2,2	40 500	9 450
<b>Sum/Average</b>		<b>4 275</b>	<b>5,5</b>	<b>1,2</b>	<b>5,3</b>	<b>128 250</b>	<b>29 925</b>

Source: TLC, FESARTA, & Crickmay, week ending 04/05/2025.

<sup>8</sup> Master, F. 24/04/2025. [China, Kenya upgrade ties amid 'turbulent international situation'](#).

<sup>9</sup> 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.

<sup>10</sup> Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

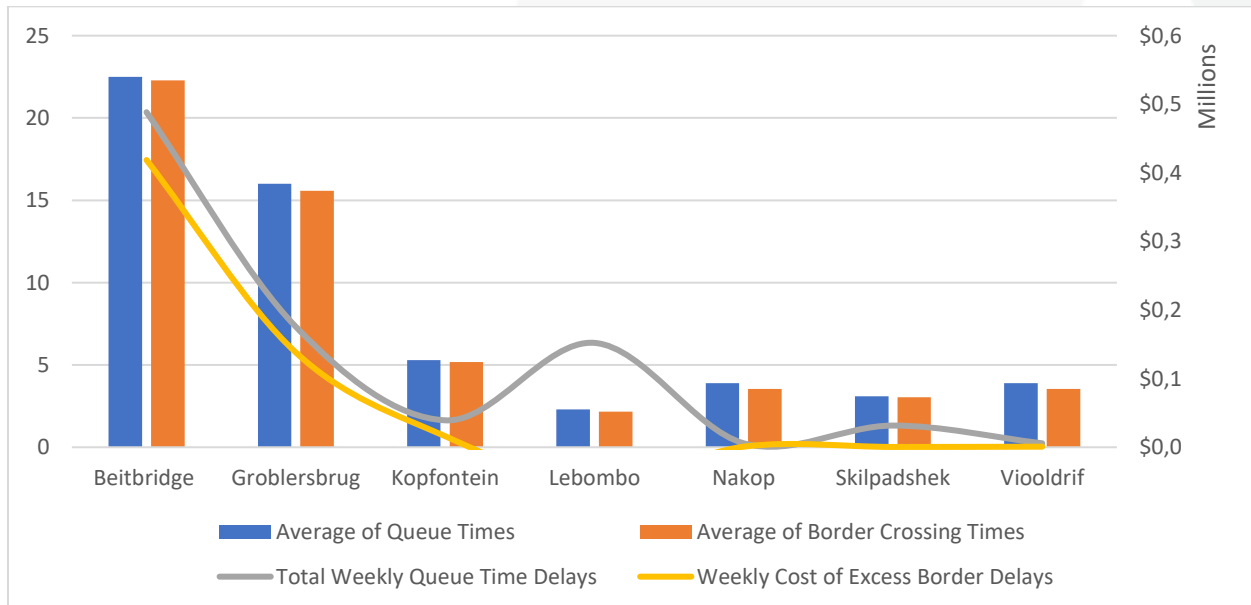
Table 7 – Delays summary – Corridor perspective

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	12,1	2,6	11,8	9 600	2 240
Central Corridor	798	2,9	0,1	2,8	23 940	5 586
Dar Es Salaam Corridor	1 819	6,5	0,7	6,5	54 570	12 733
Maputo Corridor	2 513	1,7	0,3	1,4	75 390	17 591
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 481	7,2	1,2	7,1	104 430	24 367
Northern Corridor	2 817	0,5	0,0	0,5	92 520	21 588
Trans Caprivi Corridor	116	7,8	1,1	7,7	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	283	1,7	0,5	1,6	8 490	1 981
Trans Oranje Corridor	100	2,8	0,8	2,6	3 000	700
<b>Sum/Average</b>	<b>12 474</b>	<b>3,9</b>	<b>0,6</b>	<b>3,8</b>	<b>382 230</b>	<b>89 187</b>

Source: TLC, FESARTA, & Crickmay, week ending 04/05/2025.

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

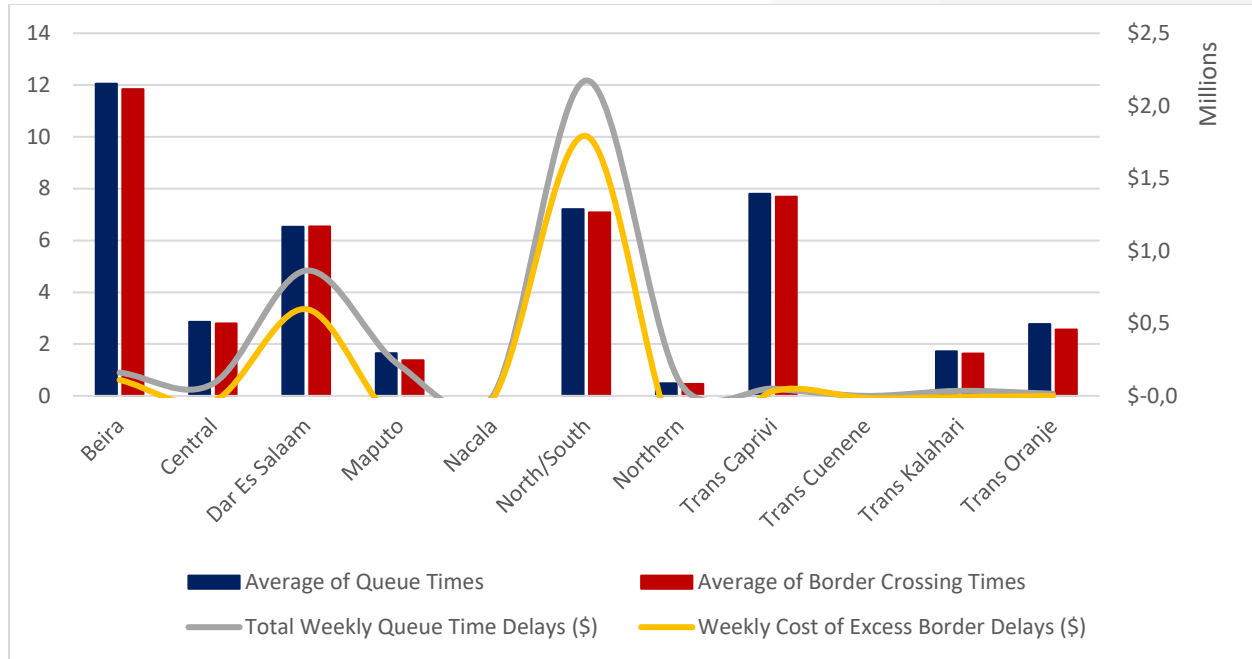
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 04/05/2025.

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 04/05/2025.

In summary, cross-border queue time averaged **~3,9 hours** (down by **~1,5 hours** from the previous week's **~5,4 hours**), indirectly costing the transport industry an estimated **\$3,7 million (R68 million)**. Furthermore, the week's average cross-border transit times hovered around **~3,8 hours** (down by **~1,5 hours** from the **~5,3 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$1,9 million (R35 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$5,6 million (R103 million)**, down by **~R53 million** or **↓34%** from **~R156 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 shipping industry and (b) the global aviation industry.

##### a. Global shipping industry

###### i. US-China trade war update

The US and China have agreed to temporarily reduce tariffs on each other's goods for 90 days, lowering US tariffs on Chinese imports from **145%** to **30%** and China's tariffs on US imports from **125%** to **10%**.<sup>11</sup> This truce has boosted global markets and will revive trade flows, but the reductions are only temporary and do not resolve deeper trade disputes. Uncertainty remains about long-term relations, as the agreement leaves key issues like fentanyl trade and non-tariff barriers unresolved.

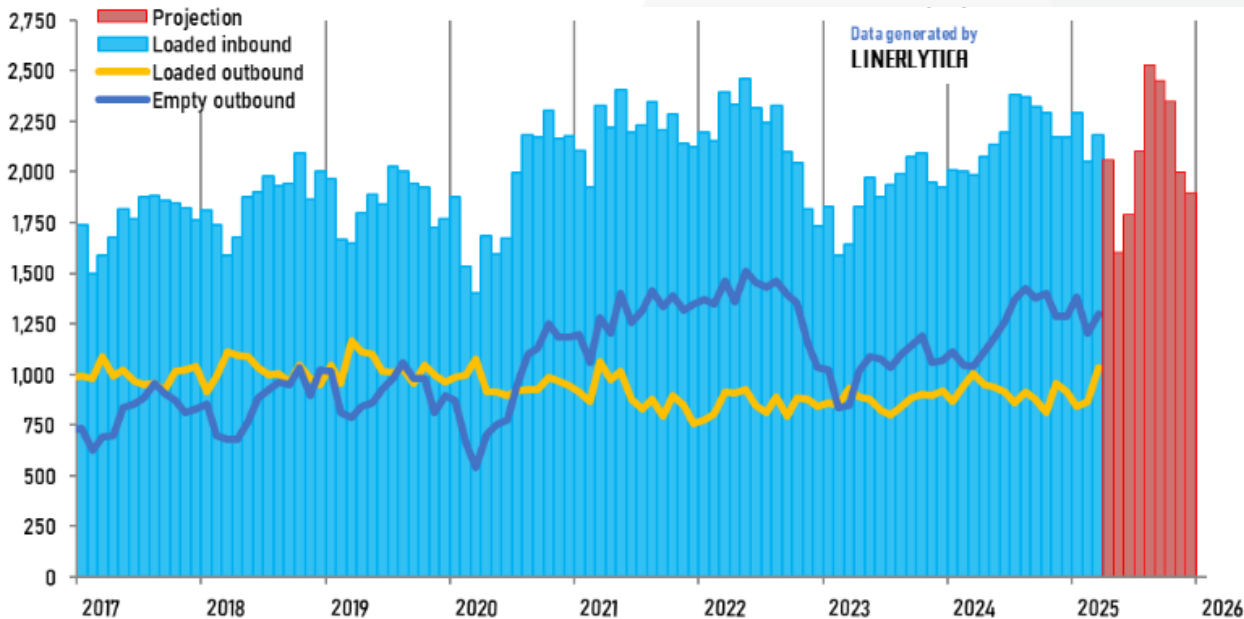
This de-escalation is anticipated to trigger a significant surge in Transpacific cargo volumes, aligning with the traditional summer peak season. Carriers have announced provisional peak season surcharges ranging from **\$1 000** to **\$2 000** per forty-foot equivalent unit (FEU), potentially elevating freight rates to the US West Coast

<sup>11</sup> Edser, N. et.al. 13/05/2025. [Markets rise as US and China agree to slash tariffs.](#)

above **\$3 500**. Additionally, freight rates on other routes are expected to rise as vessel capacity shifts to accommodate increased Trans-Pacific demand. The positive market sentiment is also influencing the charter market, with charter rates projected to recover as carriers reinstate tonnage previously withdrawn from US services.

The 115% cut in US tariffs on China was larger than expected, amidst signs of severe strain on US import volumes that would have hit store shelves in the coming weeks. This is now set to reverse, with an import surge expected over the next three months that could exceed the COVID-era peaks seen in 2021-2022:

Figure 15 – Top 10 North American Ports monthly container volumes (actual to Mar 2025 with projections to Dec 2025)



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

## ii. Global freight rates

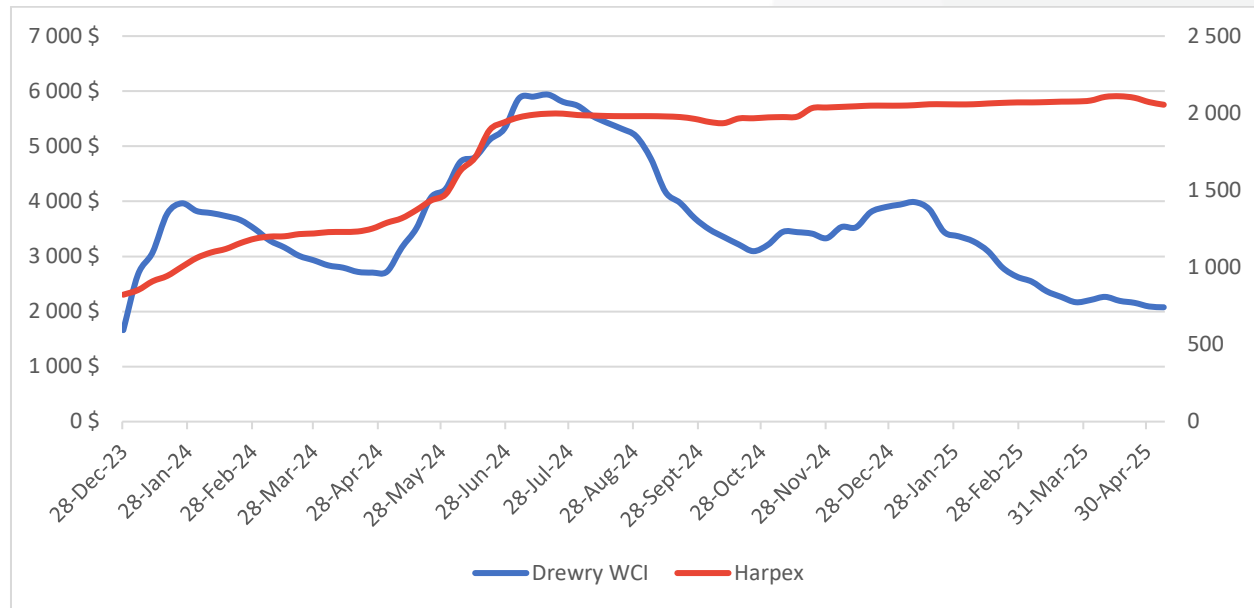
This week, Drewry's "World Container Index" again decreased, as the index dropped by a less-pronounced (versus the last three weeks) **↓0,7%** (or **\$15**) to **\$2 076 per 40-ft container**<sup>12</sup>. Freight rates are, however, expected to surge after the earlier-than-expected de-escalation in the Sino-US trade war. Meanwhile, charter rates decreased for the third consecutive week, as the *Harper Petersen Index* (Harpex) traded around **2 055 points** (**↓0,8%**, w/w) on Friday.<sup>13</sup> Specifically, the containership charter market is experiencing a decline in rates for vessels larger than **5 000 TEU**, attributed to uncertainties stemming from US-China trade tensions. According to Clarkson's latest report, daily rates for **6 500 TEU** ships have decreased to **\$72 000** from **\$73 438** the previous month, indicating a market correction influenced by geopolitical factors.<sup>14</sup> The following figures show the two indices since the end of 2023:

<sup>12</sup> Drewry. 08/05/2025. [World Container Index](http://World Container Index).

<sup>13</sup> Harpex. 09/05/2025. [Harper Petersen & Co Charter Rate Index](http://Harper Petersen & Co Charter Rate Index).

<sup>14</sup> Koo, A. 07/05/2025. [Containership charter market feels the ripples from trade tensions](http://Containership charter market feels the ripples from trade tensions).

Figure 16 – World Container Index (\$ per 40ft), and Harper-Petersen Index



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

### iii. Further developments of note

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

#### 1. Global vessel fleet update by fuel type:

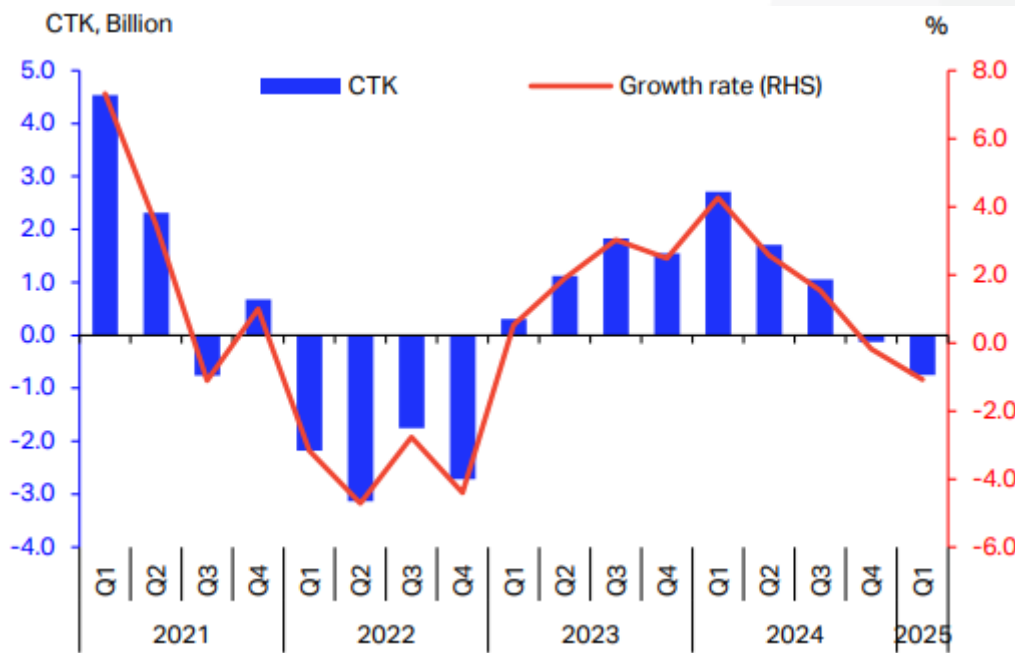
- a. **LNG-fuelled dominance in new builds:** Over **56%** of the global container ship orderbook capacity (**5,1 million TEU**) comprises LNG-fuelled vessels, indicating a clear shift from scrubber-fitted ships to alternative fuels amid tightening emission regulations.<sup>15</sup>
- b. **Larger vessels lead in alternative fuels:** The majority of LNG (**77%**) and Methanol (**63%**) newbuilds are container ships with capacities above **10 000 TEU**, reflecting prioritisation of cleaner fuels for larger vessels.
- c. **Scrubbers still widely used in the fleet:** Despite the shift in new orders, scrubber systems remain prevalent in the current fleet, equipping over **22%** of vessels by count and **42%** by capacity.

#### b. Global air cargo industry

In the recently published “*Air Transport Chartbook*”, IATA notes that air cargo shipments rose **↑2,4%** in Q1 2025 compared to last year, reaching a record **65 billion CTK**. The levels surpass Q1 2024 by **1,5 billion** in terms of volume. This marks the seventh straight quarter of gains, despite slowing down from the **↑13%** year-on-year surge recorded in Q1 2024. Adjusted for seasonal patterns, total air cargo volumes fell **↓1,1%** from Q4 2024, marking the second consecutive decline after the drop of **↓0,2%** (q/q) in Q4 2024. This ends a strong growth streak from Q1 2023 to Q3 2024, which peaked at **↑4,3%** (q/q) in Q1 2024.

<sup>15</sup> Alphaliner. 13/05/2025. [LNG-fuelled Container Ships make up over half of the entire orderbook.](#)

Figure 17 – Industry CTK, seasonally-adjusted, q/q (billions)



Source: [IATA](#)

In the high-frequency metrics, World ACD data shows that global air cargo tonnages fell by **↓3%** (w/w), primarily driven by an **↓11%** drop from Asia Pacific, exacerbated by China’s Labour Day and Japan’s Golden Week. Africa’s tonnages remained flat week-on-week, while Europe saw a **↑7%** post-Easter rebound. Capacity continued to adjust to seasonal and policy shifts.

Figure 18 – Regional changes in capacity, chargeable weight, and rates (weeks 2 to 5, % change)

**Origin Regions**

last 2 to 5 weeks

Origin Regions	Capacity <sup>1</sup>			Chargeable weight <sup>1</sup>			Rate <sup>1</sup>		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-1%	+2%		-5%	-2%		+3%	+9%
Asia Pacific		-2%	+0%		-3%	+5%		-2%	-3%
C. & S. America		+9%	+3%		+19%	+4%		+6%	-3%
Europe		-1%	+1%		-14%	-9%		-2%	+1%
M. East & S. Asia		-1%	+5%		+3%	+4%		-1%	-13%
North America		-0%	-0%		-4%	-2%		-2%	+0%
Worldwide		-1%	+1%		-4%	+0%		-2%	-2%

Source: [World ACD](#)

Worldwide average air cargo rates held steady at **\$2,40/kg**, though regional variations emerged. Asia Pacific rates rose **↑3%** (w/w) due to a shift in cargo mix, despite intra-Asia traffic plunging **↓26%**. Africa’s spot rates declined **↓2%** (w/w). Spot rates globally averaged **\$2,56/kg**, unchanged from the prior week.

Early effects of the 2 May removal of the US “*de minimis*” exemption are visible: China–US volumes dropped **↓14%**, and spot rates fell **↓9%** (w/w) to **\$3,85/kg**. In contrast, China–Europe flows fell only **↓3%**, with rates down **↓4%** to **\$3,97/kg**.

ENDS<sup>16</sup>

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<sup>16</sup>**ACKNOWLEDGEMENT:**

*This initiative – **The Cargo Movement Update** – was developed collectively by the Private Sector at large to provide visibility of the movement of goods during the COVID-19 pandemic. The report is authored by the Southern African Association of Freight Forwarders (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.*