

Cargo Movement Update #224¹

Date: 9 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)	38 569	43 940	82 509	33 789	38 495	72 284	↑14%
Air Cargo (tons)	3 860	2 573	6 433	3 493	2 405	5 898	↑9%

Monthly Snapshot

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

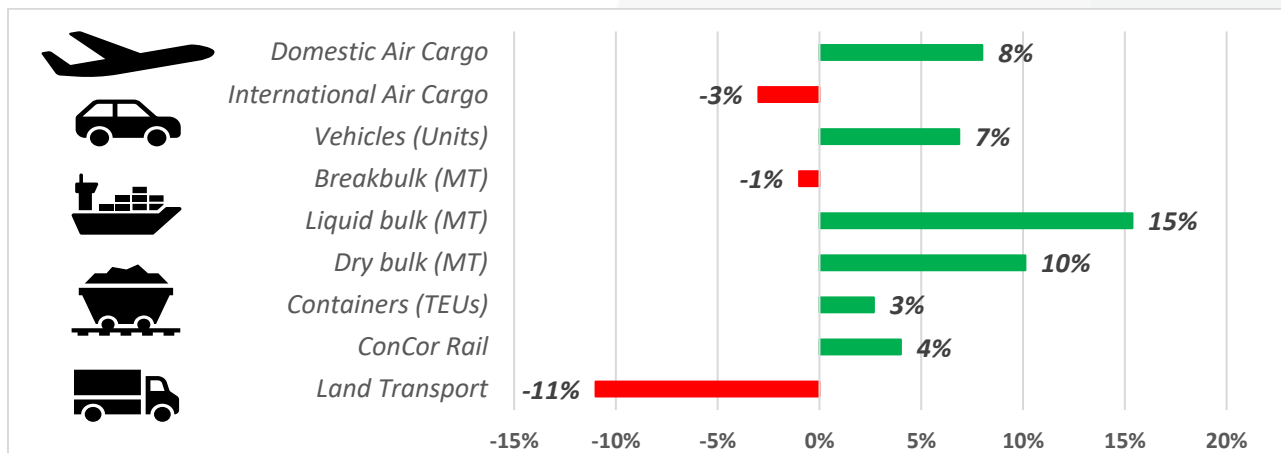
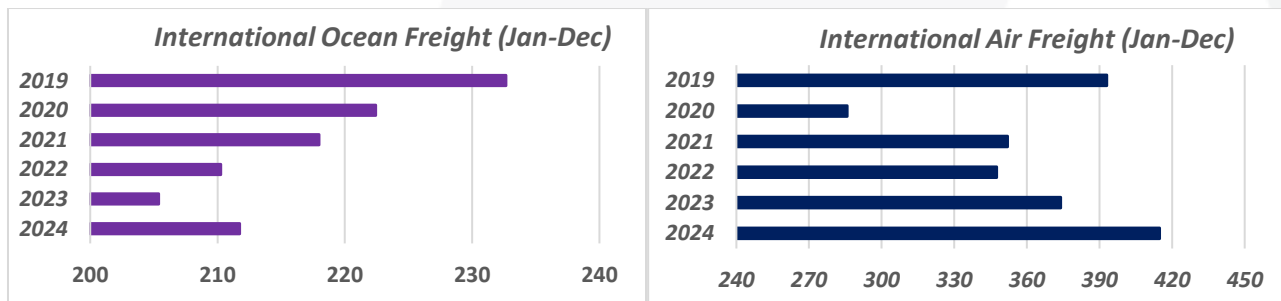


Figure 2 – Year-to-date flows 2019-2024⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~11 787 TEUs** was handled per day, with **~11 381 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 607** containers, with no change from last week.
- Truck volumes through Lebombo are steady at **1 403 HGVs/day**, with **15-23km** queues over the weekend.
- Cross-border queue: **↓0,3 hrs**; transit: **↓0,6 hrs**; SA borders: **10,9 hrs (↓4%)**; SADC: **4,4 hrs (↓27%)**.
- MSC is set to become the largest operator by acquiring an 80% stake in Hutchison's global portfolio.
- Global spot rates dropped by **↓3,3%** (or **\$88**) and now trade at around **\$2 541 per 40-ft container**.
- Global air cargo capacity and tonnages increased in February, with worldwide tonnages rising **↑5%** (y/y).

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 224th 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: Jan vs Jan.

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

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. In our container terminals, an increased average of **11 787 TEUs** was handled per day, up from **10 326 TEUs** last week. Inclement weather, dredging, equipment breakdowns and shortages mainly characterised port operations. Strong winds proved to be the main operational constraint in Cape Town while dredging and equipment breakdowns and shortages ensured operational delays in Durban. Adverse weather conditions impacted our Eastern Cape Ports; however, minimal reports were received for the Port of Richards Bay. Earlier this week, Maersk announced that the ONE Responsibility/250N will omit Cape Town and sail directly to Europe from Durban. In addition, the Maersk Chennai 508E has encountered delays in West Africa and will omit Coega. Furthermore, the latest reports from TFR suggest that rail operations on the ConCor were impacted by heavy rain over the weekend of 1 March. The line experienced numerous washaways, where King's Rest was deemed inaccessible at the inception of the week.

Globally, MSC's strategic acquisition of Hutchison Ports this month significantly expands its global terminal footprint, positioning it as the world's largest container terminal operator. This acquisition, however, awaits regulatory clearances that may mandate divestments to address competition concerns and geopolitical sensitivities. Additionally, slow-steaming practices, driven by economic and carbon emission regulatory pressures, continue across the global fleet, aligning with international sustainability targets such as the EU's CBAM. Despite carriers implementing blanked sailings and general rate increases, global container spot rates have persistently declined, notably on the Asia-North Europe route. Meanwhile, charter rates remain elevated, underscoring the continuing complexity of managing global shipping dynamics amid market volatility and environmental compliance requirements. Further developments include financial updates from **(1) K+N**, **(2) DHL Global Forwarding**, and **(3) CMA CGM**.

In the air cargo space, the daily average of air cargo handled at ORTIA in the previous week amounted to **551 455 kg** inbound (**↑11%**, w/w) and **367 610 kg** outbound (**↑7%**). Volumes rebounded after two consecutive weeks of reductions, as cargo levels are again above the average levels of 2024 (**↑13%**, y/y) and pre-pandemic levels of 2020 (**↑8%**). Internationally, full-month figures for February suggest a weakening of China to the US air cargo market compared with China to Europe as shippers adjust to the fast-changing policies and statements of the new Trump administration. In other air cargo news, a 24-hour strike at major German airports severely disrupted operations, causing thousands of flight cancellations amid ongoing wage negotiations involving ground and security staff.

Cargo flows across the Lebombo Border Post and N4 Corridor have increased slightly this week, with truck volumes steady compared to last week at **1 403 HGVs per day** (**↑4%**, w/w). The average queue for the week was **7 km**, and an average border time of around **4,3 hours** per crossing; however, road works over the weekend resulted in queues of **23km** on **Friday** and **15km** on **Saturday**. Road works were completed on Monday (9 March), and the queues consequently subsided. Rail to Maputo was steady at **an average of six trains a day** in the last week. Sugar trains from Eswatini are constant at around **1,3 trains daily**, although the reporting has not been comprehensive.

For the rest of SADC borders, the average queue times decreased by around **20 minutes** from last week, as the transit times decreased by slightly more than **half an hour**. The median border crossing times at South African borders decreased by **half an hour**, averaging **~10,9 hrs** (**↓4%**) for the week. In contrast, the greater SADC region (excluding South African controlled) decreased by **an hour and a half** from last week, averaging **~4,4 hrs** (**↓27%**). On average, only Kasumbalesa took more than a day to cross last week, averaging around **a day** from the **DRC side** and **two days** from the **Zambia side**. Other developments include **(1) border**

closures due to flooding, **(2)** congestion on the Kasumbalesa-Lubumbashi route, **(3)** Namibia Revenue Agency (NamRA) policy update, **(4)** Lesotho's New Taxpayer Identification System and **(5)** poor road conditions from Kosi Bay to Beira.

South Africa's trade, transport, and logistics sectors are showing incremental improvement, with port volumes rising by an encouraging **↑14%**, although operational challenges persist due to weather and infrastructure constraints. Significant structural reforms, including private sector participation and Transnet restructuring initiatives, are progressing steadily, promising substantial long-term benefits. However, rail performance remains concerning, with inefficiencies still costing the economy around **R1 billion** daily, highlighting the urgency for rail restructuring and open-access reforms. The ongoing work of the National Logistics Crisis Committee underscores the coordinated efforts needed to modernise infrastructure, enhance regulatory frameworks, and improve competitiveness. Continued commitment to these reforms is essential to sustain growth, reduce logistics costs, and maintain South Africa's regional economic prominence.

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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 3 to 9 March (measured in TEUs)

7-day flow reported (03/03/2025 – 09/03/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	3 792	26 547	↓8%
New Pier (Pier 1)	1 764	12 349	↑17%
Cape Town Container Terminal	2 599	18 195	↑39%
Ngqura Container Terminal	2 313	16 188	↑50%
Port Elizabeth Container Terminal	370	2 591	↑195%
Other	948	6 639	↓19%
Total	11 787	82 509	↑14%

Source: Calculated from TPT, 2025. Updated 09/03/2025.

An increased average of ~**11 787 TEUs (↑14%)** was handled per day for the last week (3 to 9 March, Table 2), below the projected average of ~**11 381 TEUs (↑4% actual versus projected)**.

For the coming week, a slightly decreased average of ~**11 381 TEUs (↓3%)** is predicted to be handled (10 to 16 March, Table 3). Adverse weather, dredging, equipment breakdowns and shortages mainly constrained port operations.

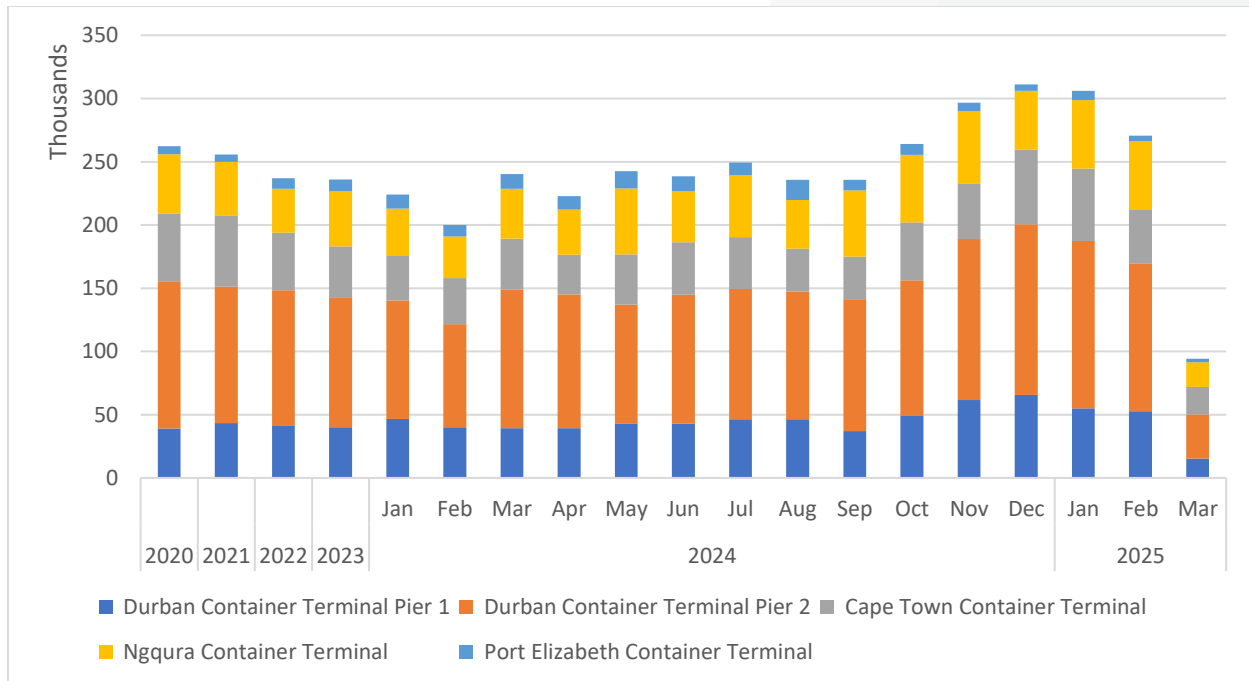
Table 3 – Container Ports – Weekly flow projected for 10 to 16 March (measured in TEUs)

7-day flow reported (10/03/2025 – 16/03/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 440	31 078	↑17%
New Pier (Pier 1)	1 641	11 490	↓7%
Cape Town Container Terminal	2 113	14 793	↓19%
Ngqura Container Terminal	1 989	13 922	↓14%
Port Elizabeth Container Terminal	272	1 907	↓26%
Other	925	6 474	↓3%
Total	11 381	79 665	↓3%

Source: Calculated from TPT, 2025. Updated 09/03/2025.

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.

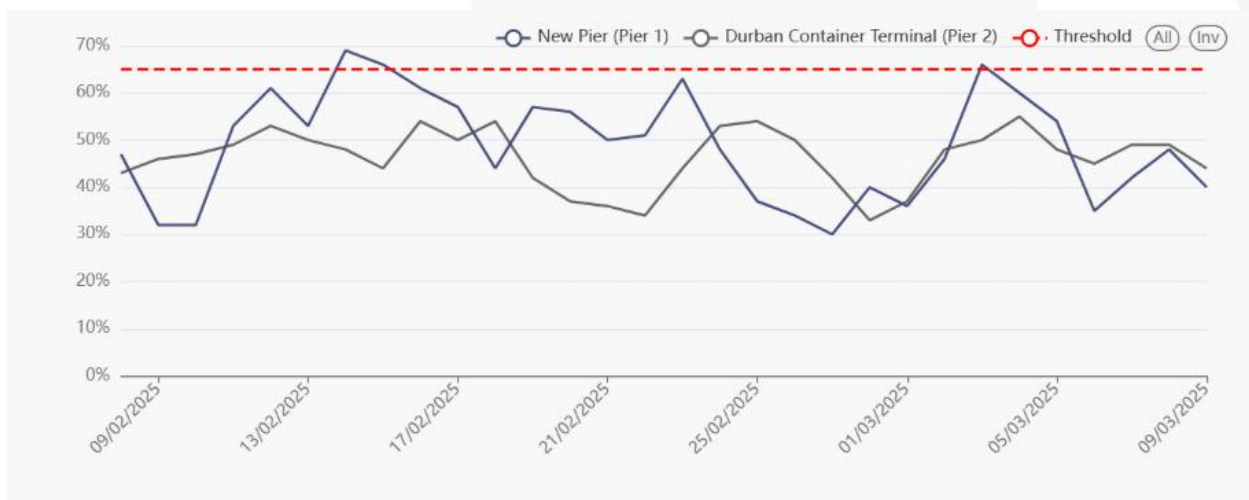
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 09/03/2025.

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

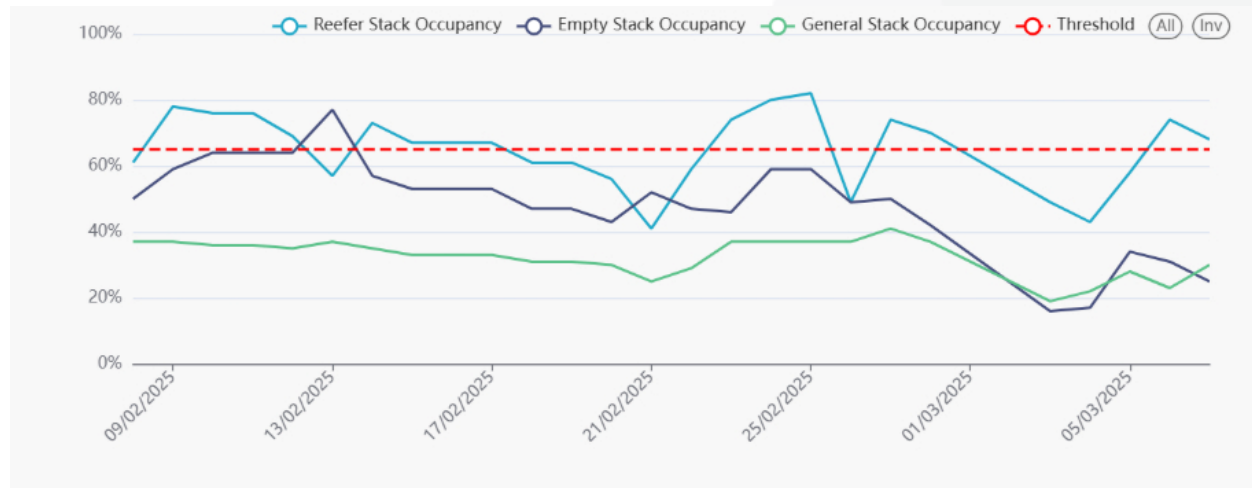
Figure 4 – Stack occupancy in DCT, general-purpose containers (9 February to present; a day on the day)



Source: Calculated using data from Transnet, 2025, and updated 09/03/2025.

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 (9 February to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 09/03/2025.

b. Summary of port operations

i. Weather and other delays

- Strong winds proved to be the main operational constraint in Cape Town.
- Dredging and equipment breakdowns and shortages ensured operational delays in Durban.
- Adverse weather conditions impacted our Eastern Cape Ports.
- Minimal reports were received for the Port of Richards Bay.

ii. Cape Town

On Thursday, CTCT recorded three vessels at berth and four at anchor, as faulty reefers on the MSC Anchorage proved to be the primary operational constraint. The Port of Cape Town is now on the second page of Linerlytica's "Port Congestion Watch", with a queue-to-berth ratio of **0,78**.⁶ On the landside, between Monday and Thursday, the terminal managed to service 4 046 trucks while handling approximately 285 rail units. On the waterside, the terminal executed approximately 5 885 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 23%, reefers at 74%, and empties at 31%**. Additionally, the terminal operated with **seven STS cranes, 22 RTGs, and 64 hauliers** towards the end of the week. The latest reports suggest that Crane LC3 was out of commission for most of the week, with LC4 going out of commission just before the weekend.

On Thursday, CTMPT recorded one vessel at berth and one at outer anchorage. In the preceding 24 hours, the terminal managed to handle 271 container moves across the quay on the waterside. On the landside, 271 trucks were processed during the same period. Stack occupancy was recorded at 60% for general cargo, 74% for reefers, and 8% for empties. Towards the end of the week, the terminal operated with two cranes and four straddle carriers. The latest reports suggest that Crane LM400 is out of commission but should return to operations before the weekend.

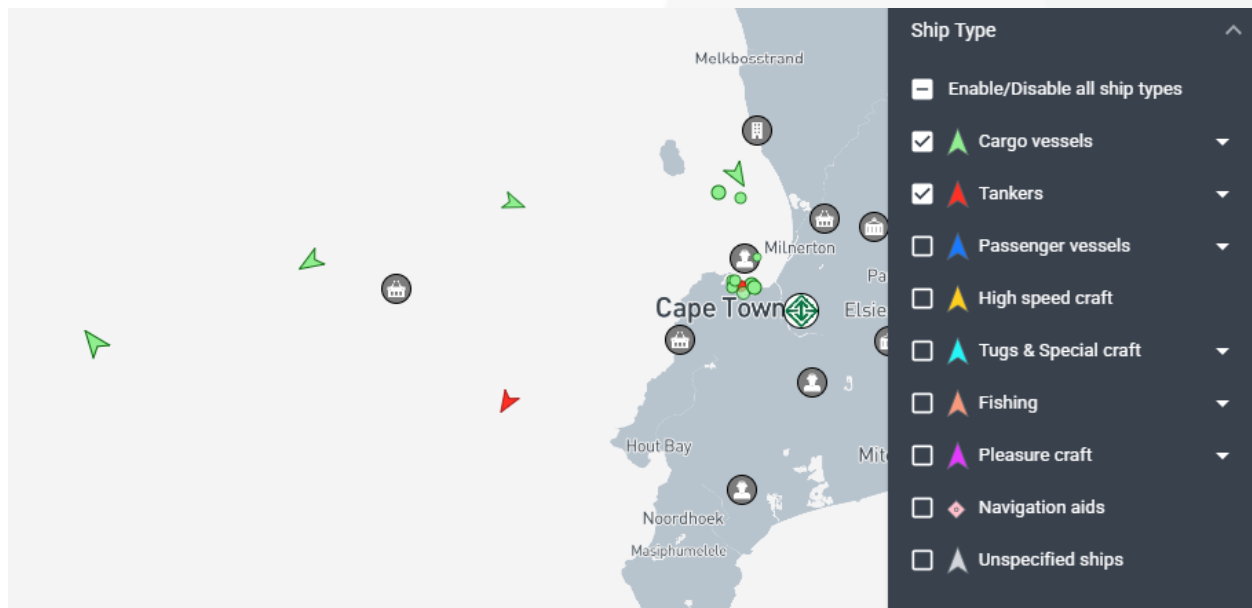
Earlier this week, Maersk announced that the ONE Responsibility/250N will omit Cape Town and sail directly to Europe from Durban. She will take the position of Santa Clara in Europe. The Cape Town imports will be

⁶ Linerlytica. 08/03/2025. [Port Congestion Watch](#).

discharged in Port Elizabeth (NCT) and loaded on the Santa Rita, which will take the position of the ONE Responsibility in Cape Town to provide uninterrupted coverage.

Between 24 February and 02 March, the FPT terminal handled eight vessels: three multi-cargo, four dry bulk, and one container vessel. Berth occupancy during this period was recorded at 91%. The terminal planned to handle nine more vessels between 03 and 09 March, with another seven vessels scheduled between 10 and 16 March. The late arrival of cargo and adverse weather conditions ensured operational constraints during this period.

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



Source: Marine Traffic. Updated 10/03/2025 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 **35%** for **GP containers**. Between Monday and Thursday, the terminal executed approximately 3 797 gate moves and 149 rail moves on the landside. The **average TTT** for the week was **~89 minutes (↑22%, w/w)** and an average **staging time** of **~76 minutes (↑56%)**. Additionally, the terminal moved over 5 500 TEUs across the quay on the waterside during the same period. The terminal operated with **six STS cranes** and **12 RTGs** towards the end of the week.

Pier 2 had three vessels on berth and two at anchorage on Friday, as dredging and 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 10 700 containers across the quay between Monday and Thursday on the waterside. Approximately 10 036 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~84 minutes (↑11%, w/w)** and another low staging time of **~65 minutes (↑2%)**. Approximately 1 332 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **51** and **55** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **60%** during this period.

Durban's MPT terminal recorded zero vessels at berth on Thursday and zero at outer anchorage. Stack occupancy for containers was 21%, with the breakbulk stack around 5%. In the preceding 24 hours, the terminal handled 231 containers and zero tons of breakbulk on the waterside. On the landside, 357 container

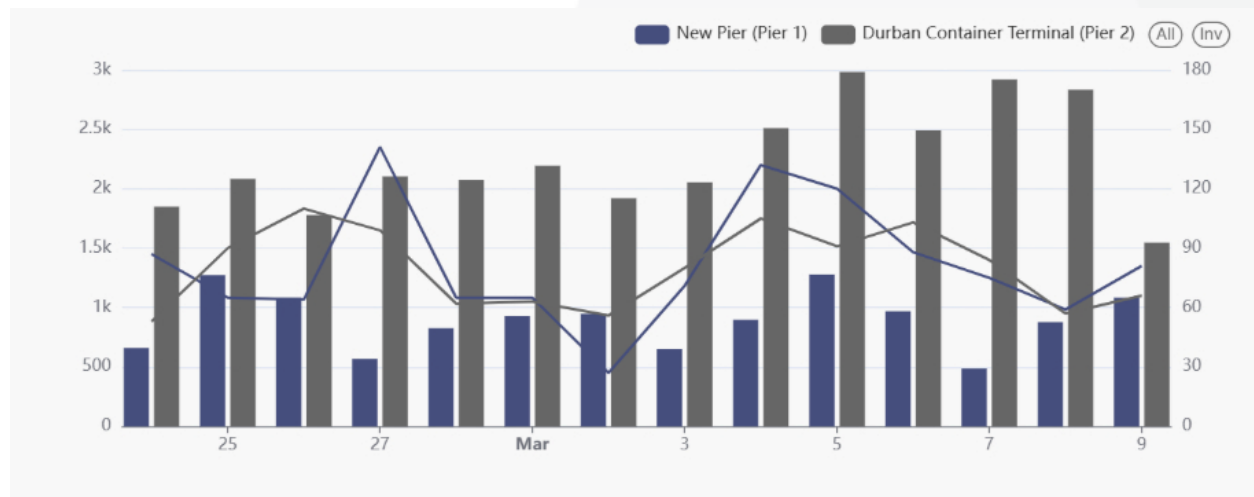
trucks and zero breakbulk RMTs were serviced. During this period, two cranes, nine reach stackers, seven forklifts, and 15 ERFs were in operation. The anticipation is that the third crane should return to service before the weekend, while the technical team do not know when the fourth crane will return.

On Wednesday, the Maydon Wharf MPT recorded zero vessels at berth or at anchor. On the waterside, no volumes were handled across the quay in the 24 hours leading to Thursday. On the landside, 92 trucks were handled during the same period, containing approximately 2 470 tons. Minimal reports were received for the agri-bulk facility.

On Thursday, the Ro-Ro terminal in Durban recorded three vessels on the berth, with one at anchorage. In the 24 hours before, the terminal handled 684 road and 295 rail units on the landside while handling 2 306 units on the waterside. Overall stack occupancy was 34%, 60% at Q&R, and 80% at G-berth. During this period, the terminal had 207 high-and-heavy (abnormal loads) on hand and managed to handle two.

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 terminal.

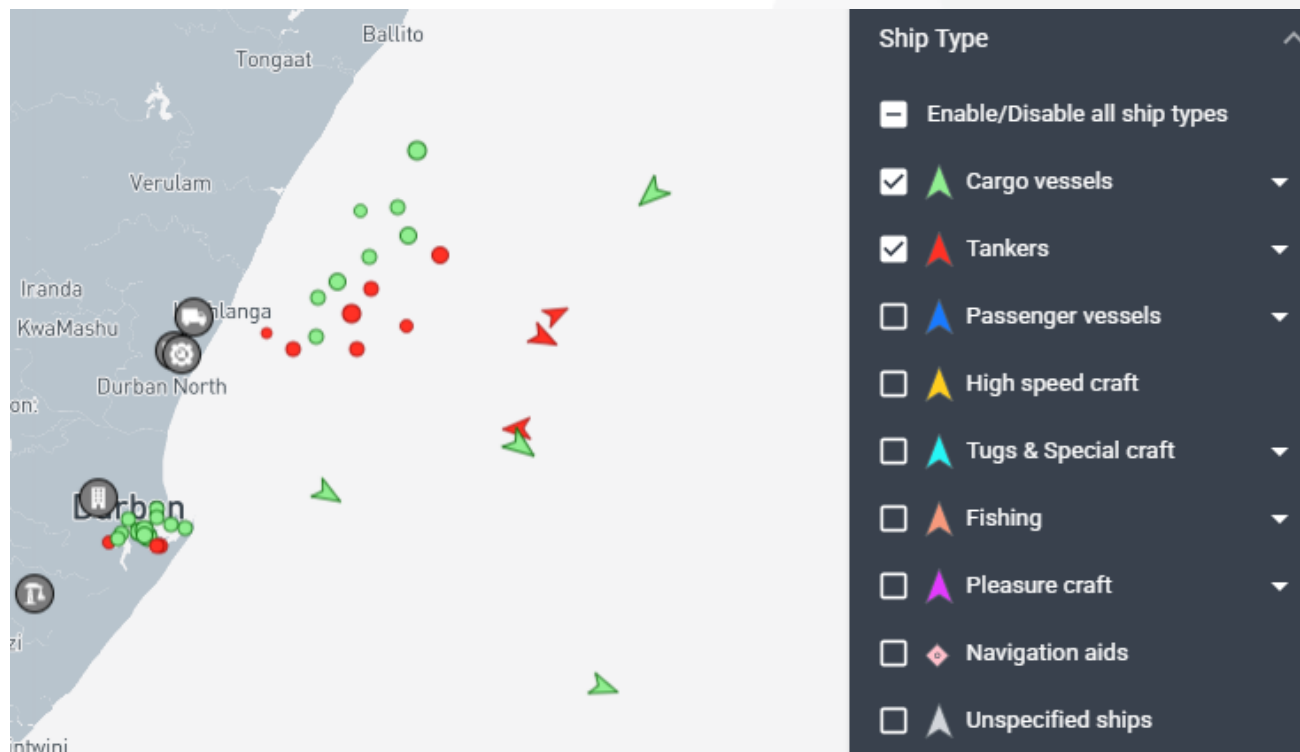
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 09/03/2025.

The queue of container vessels waiting outside Durban remains relatively low. On Monday evening (10 March), **one** container vessel was waiting for Pier 1, **two** for Pier 2, and **zero** for Point. Several dry, liquid, and breakbulk vessels remain in the queue, as evidenced by the snapshot:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 10/03/2025 at 14:00.

Lastly, TNPA is seeking proposals for a 25-year concession to design, develop, fund, build, operate, maintain, and transfer a multipurpose terminal in Durban's Maydon Wharf Precinct. This 145-hectare area includes 15 berths and handles over **7 million tonnes of cargo annually**, encompassing dry bulk, breakbulk, limited liquid bulk, and some containerised units. The initiative aims to modernise infrastructure, optimise cargo handling, and reinforce Durban's position as a key regional trade gateway.⁷

iv. Richards Bay

On Thursday, Richards Bay had 12 vessels at anchor and 11 on the berth, translating to five vessels at DBT, three at MPT, three 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. The daily average for the week increased significantly to around **169 000 tons** (↓1%, w/w). An average of **20 trains** (down by three from last week) were serviced on the landside and slightly below the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded three vessels on berth and two 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 18% for reefers, 38% for reefer ground slots, and 23% for the general stack. Despite experiencing crane breakdowns for over five hours, the terminal handled

⁷ Ajdin, A. 07/03/2025. [South Africa seeks operator for multipurpose terminal in Durban.](#)

approximately 3 071 TEUs and 186 reefers on the waterside. Approximately 311 trucks were processed on the landside at a TTT of ~26 minutes.

The latest reports from Maersk suggest that the ONE Responsibility will call Port Elizabeth (NCT) Northbound upon completion of operations in Durban. The vessel will sail directly to Europe after completing her operations in Port Elizabeth. She is expected to berth around 14 March at NCT, with an ETA into London on 31 March and into Rotterdam on 01 April (Weather permitting).

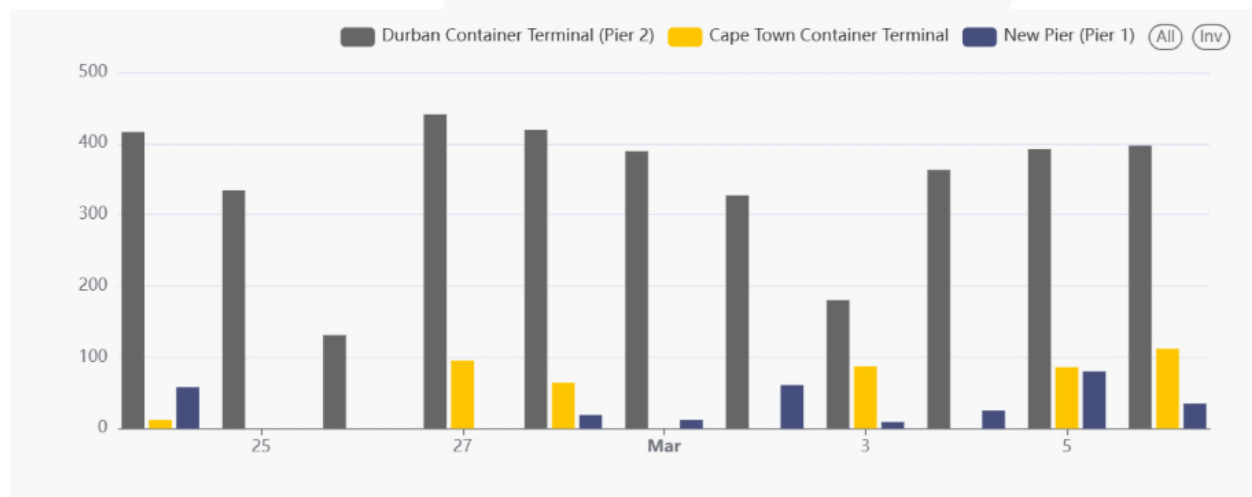
In addition, the Maersk Chennai 508E has encountered delays in West Africa, and Cape Town is currently facing a high waiting time of nine days. To mitigate further schedule disruptions, a decision was made earlier this week to omit Coega, allowing the vessel to recover its schedule. After completing its Cape Town call, the Maersk Chennai 508E will proceed directly to Jebel Ali.

On Thursday, GCT had one vessel at berth and one 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, 18 trucks were processed at a TTT of ~16 minutes on the landside, while 1 414 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 6% for the general stack, 1% for reefers, and 6% for reefer ground slots.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that rail operations on the ConCor were impacted by heavy rain over the weekend of 1 March. The line experienced numerous washaways, where King's Rest was deemed inaccessible at the inception of the week. Towards the end of the week, TFR announced that the line between City Deep and Botswana reopened after the washaways earlier this week. Additionally, towards the end of the week, DCT Pier 2 had 48 ConCor units on hand with a dwell time of 48 hours and 389 over-border units with a dwell time of 50 days.

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



Source: Calculated using data from Transnet, 2024. Updated 09/03/2025.

In the last week (3 to 9 March), rail cargo out of Durban was reported at **2 607** containers, **no change** from the previous week's **2 607** containers.

vii. General

This week, Maersk announced an increase in the South Africa Behavioural Surcharge and demurrage and detention charges, taking effect from 1 April 2025. Demurrage rates have been aligned with the new TPT Tariff, and demurrage-free days have been adjusted down from 3,25 days to three days across all TPT Terminals. Detention rates have also been reviewed.

Further, the latest reports from Maersk suggest that Cape Town is still experiencing intermittent Southeasterly winds, with stoppages anticipated between 10 and 14 March. CTCT seemingly has 0-8 days' waiting time, with waiting times at CTMPT sitting at three days. There are no reported waiting times at all other terminals. The same reports suggest that cyclone Garence is no longer a risk. Port Louis will remain closed until further notice. Recovery is underway, and we will be back online in the near future. Customers are now able to use non-operative reefers to load dry cargo with the NOR SPOT product, available in the IMEA (India, the Middle East, and Africa), European, NAM (North American), and LAM (Latin American) regions.

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 24 February. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *February 2024* averaged **~810 675 kg** daily.

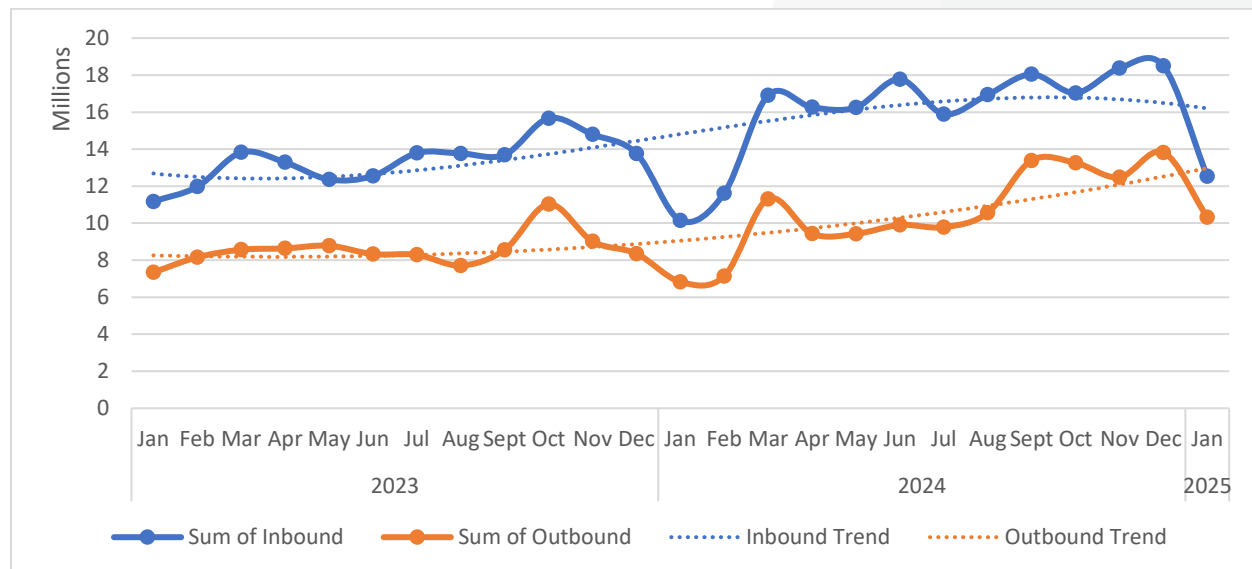
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	24-Feb	25-Feb	26-Feb	27-Feb	28-Feb	01-Mar	02-Mar	Week
Volume inbound	425 793	213 179	347 809	162 301	474 444	322 566	1 914 096	3 860 188
Volume outbound	167 162	157 755	248 054	215 047	226 699	238 047	1 320 504	2 573 268
Total	592 955	370 934	595 863	377 348	701 143	560 613	3 234 600	6 433 456

Courtesy of ACOC. Updated: 09/03/2025.

In the air cargo space, the daily average of air cargo handled at ORTIA in the previous week amounted to **551 455 kg** inbound (**↑11%**, w/w) and **367 610 kg** outbound (**↑7%**). Volumes rebounded after two consecutive weeks of reductions, as cargo levels are again above the average levels of 2024 (**↑13%**, y/y) and pre-pandemic levels of 2020 (**↑8%**). The following figure shows the air cargo flows to and from ORTIA since the start of 2023:

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

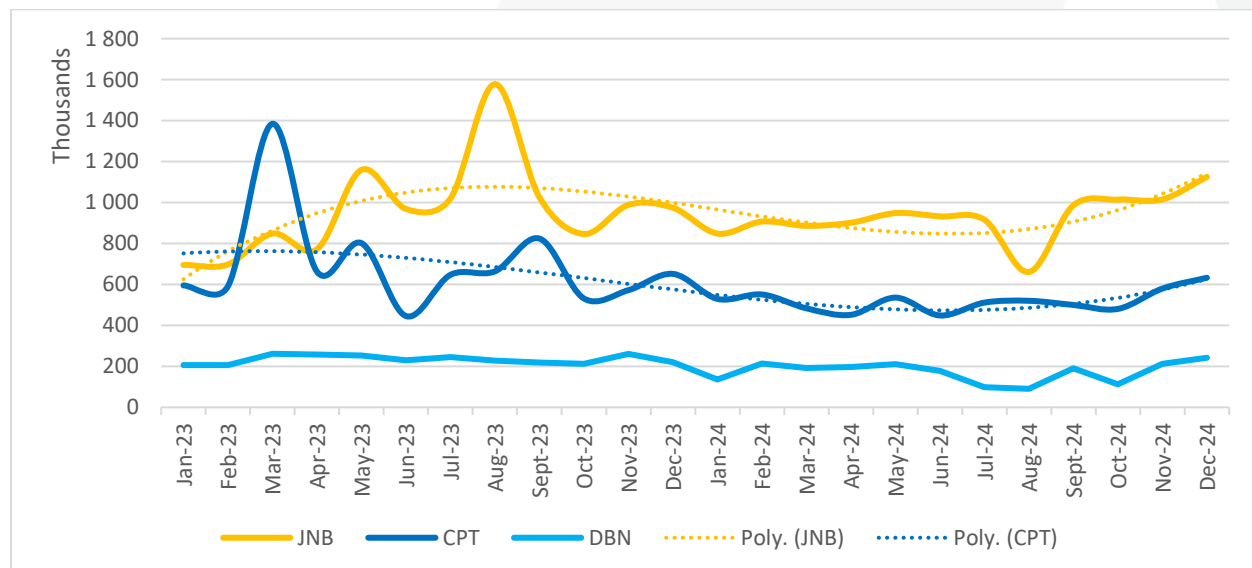


Calculated from ACOC. Updated: 09/03/2025.

b. Domestic air cargo

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 09/03/2025.

3. Road and Regional Update

a. Lebombo border post update

As of the week spanning 3 to 9 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 **1 403 HGVs per day (↑4%, w/w)**, with an average queue of **7 km** and an average border time of around **4,3 hours** per crossing.

- Road works over the weekend resulted in queues of **23km** on **Friday** and **15km** on **Saturday**. Road works were completed on Monday (9 March), and the queues consequently subsided.
- Rail to Maputo was steady at **six trains a day** on average last week.
- Sugar trains from Eswatini have decreased to around **1,3 trains a day** (although the reporting has not been comprehensive).

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

Table 5 – Lebombo border post update

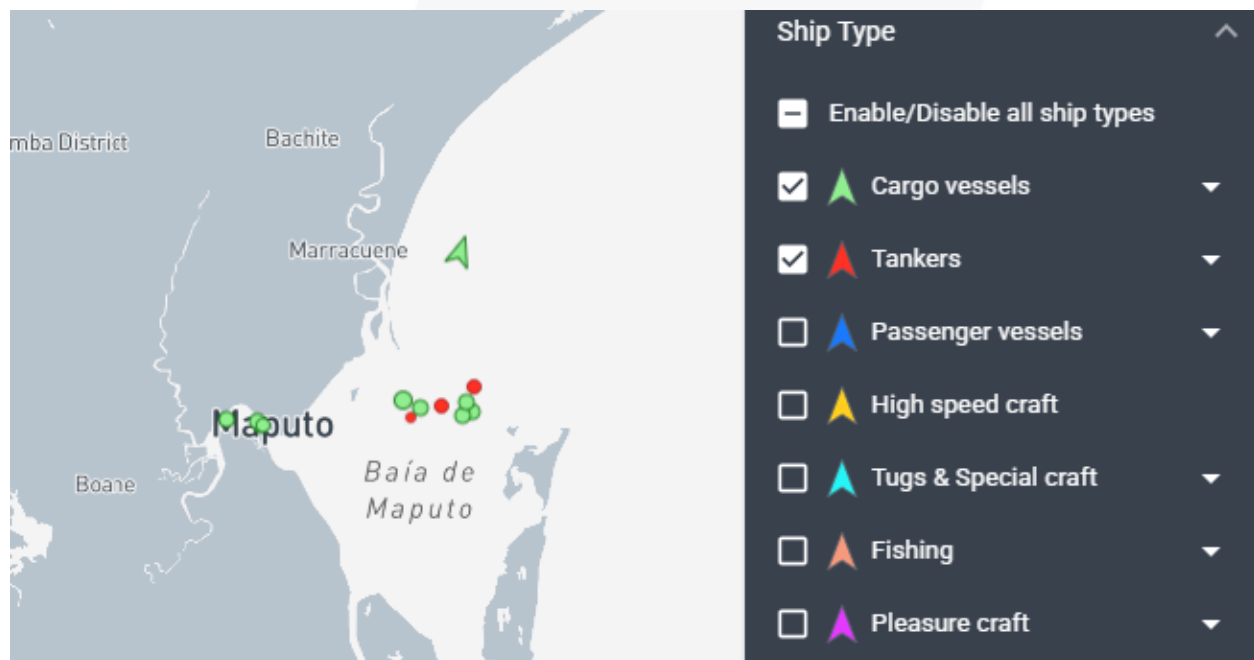
Date 06h00 Daily	Total Trucks Entering KM4	Total Trucks Exit KM4	Mineral Trucks	General Cargo (incl. critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Empty Minerals	Total Trucks inside KM4 staging	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo
Design Capacity	1 500	1 500	1 200	200	n/a	50	50	No delays	2 000	20	10	6	4
03-Mar-25	1 455	1 436	1 296	67	17	42	14		283	1	1	*	*
04-Mar-25	1 265	1 097	805	195	44	33	20		257	8	6	*	2
05-Mar-25	1 361	1 200	972	207	52	32	42		260	*	*	*	*
06-Mar-25	1 254	1 180	791	301	49	64	47		216	6	5	*	1
07-Mar-25	1 151	1 021	716	217	56	69	42		268	7	6	*	1
08-Mar-25	1 675	1 529	1 088	271	51	60	59		304	*	*	*	*
09-Mar-25	1 659	1 630	1 246	230	55	47	52		239	*	*	*	*
% of design capacity	94%	87%	82%	106%	n/a	99%	79%	n/a	13%	28%	45%	*	33%
% change (d/d)	-1%	7%	15%	-15%	8%	-22%	-12%	n/a	-17%	n/a	n/a	n/a	n/a

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 09/03/2025.

* = 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 10/03/2025 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 time decreased by around 20 minutes from last week, as the transit time decreased by slightly more than **half an hour**.
 - The median border crossing times at South African borders decreased by **half an hour**, averaging **~10,9 hrs (↓4%)** for the week.
 - In contrast, the greater SADC region (excluding South African controlled) decreased by **an hour and a half** from last week, averaging **~4,4 hrs (↓27%)**.
1. **Border closures due to flooding:**
 - **Groblersbrug Border** closed again due to rising water levels; advisories were issued Sunday and officially closed early Monday.
 - **Stockport Border** was also closed on 27 February due to the same issue.
 2. **Kasumbalesa-Lubumbashi Route (DRC-Zambia):**
 - **Kanyaka Tolls meeting:** The Governor urged **Customs to take immediate action** to relieve increasing congestion.
 3. **Namibia Revenue Agency (NamRA) policy update:**
 - On 28 February, NamRA announced that **any individual representing a debtor to NamRA would be held liable** for all outstanding costs.
 - All goods under NamRA's control will be **detained until debts are settled**, raising concerns over **logistics disruptions**.
 4. **Lesotho's New Taxpayer Identification System (TIN) (Effective 1 April 2025):**
 - Lesotho will exempt certain exporters under the new **Taxpayer Identification System (TIN)**.
 - Shippers & agents must use an agent from **Lesotho's Agents of Foreign Firms Association**, the **only approved** entity for compliance.
 - Transporters **express concerns** that the system is **not ready** and entry will not be allowed without a TIN.
 5. **Mozambique Road Conditions (EN1: Kosi Bay to Beira – 1 268 km):**
 - A transporter **reported poor road conditions**, noting **at least 16 vehicles changing rims and a rolled truck** along the route.

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

Table 6 – Delays⁸ summary – South African borders (both directions)

Border Post	Direction	HGV ⁹ Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	429	24,2	7,0	24,0	12 870	3 003
Beitbridge	Zimbabwe-SA	417	5,9	1,5	5,5	12 510	2 919
Groblersbrug	SA-Botswana	231	26,3	2,0	26,0	6 930	1 617
Martins Drift	Botswana-SA	205	2,0	0,3	2,0	6 150	1 435
Kopfontein	SA-Botswana	229	8,4	1,3	8,2	6 870	1 603
Tlokweng	Botswana-SA	24	0,1	0,2	0,4	720	168
Vioolsdrift	SA-Namibia	30	4,4	1,2	4,2	900	210
Noordoewer	Namibia-SA	20	1,6	0,3	1,4	600	140
Nakop	SA-Namibia	30	3,4	0,3	3,1	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,4	1,1	600	140
Skilpadshek	SA-Botswana	1 207	2,5	0,3	2,3	36 210	8 449
Pioneer Gate	Botswana-SA	62	0,0	0,0	0,0	1 860	434
Lebombo	SA-Mozambique	1 351	4,5	0,5	4,3	40 530	9 457
Ressano Garcia	Mozambique-SA	1 207	2,5	0,3	2,3	36 210	8 449
Sum/Average		4 498	6,5	1,2	6,3	134 940	31 486

Source: TLC, FESARTA, & Crickmay, week ending 02/03/2025.

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	10,0	1,5	9,8	9 600	2 240
Central Corridor	798	1,8	0,6	1,7	23 940	5 586
Dar Es Salaam Corridor	1 819	13,5	2,6	13,2	54 570	12 733
Maputo Corridor	2 558	3,5	0,4	3,3	76 740	17 906
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 607	9,7	1,4	9,7	108 210	25 249
Northern Corridor	2 817	1,0	0,1	1,0	92 520	21 588
Trans Caprivi Corridor	116	7,3	0,8	7,2	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	335	2,7	0,6	2,5	10 050	2 345
Trans Oranje Corridor	100	2,6	0,6	2,4	3 000	700
Sum/Average	12 697	5,1	0,9	5,1	388 920	90 748

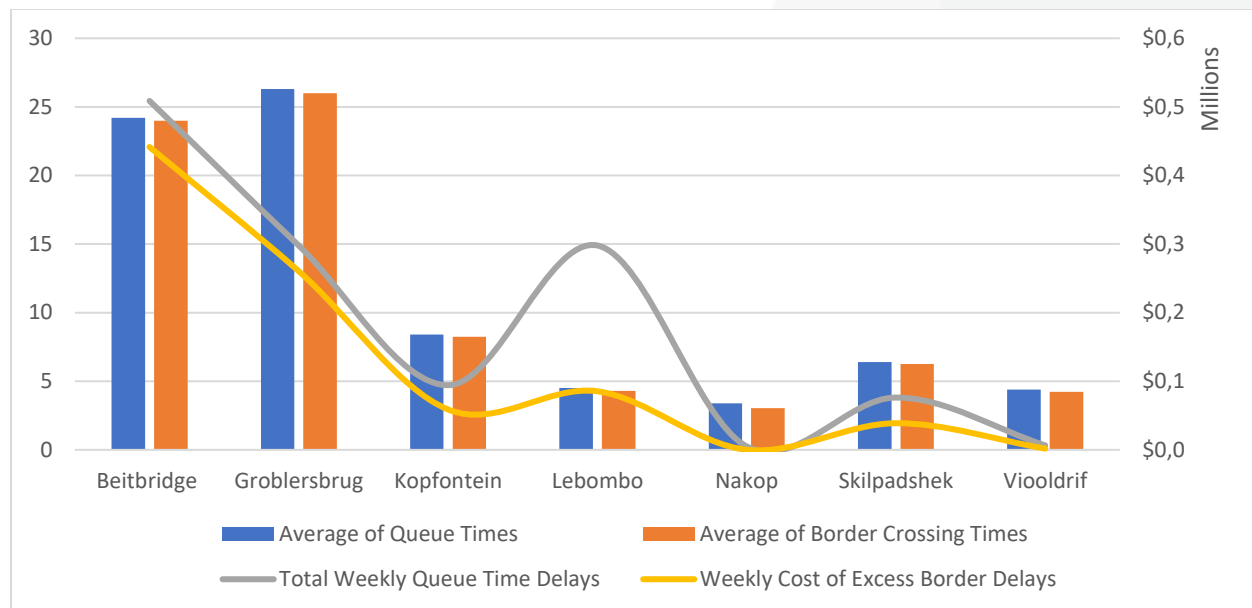
Source: TLC, FESARTA, & Crickmay, week ending 02/03/2025.

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

⁸ Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.

⁹ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

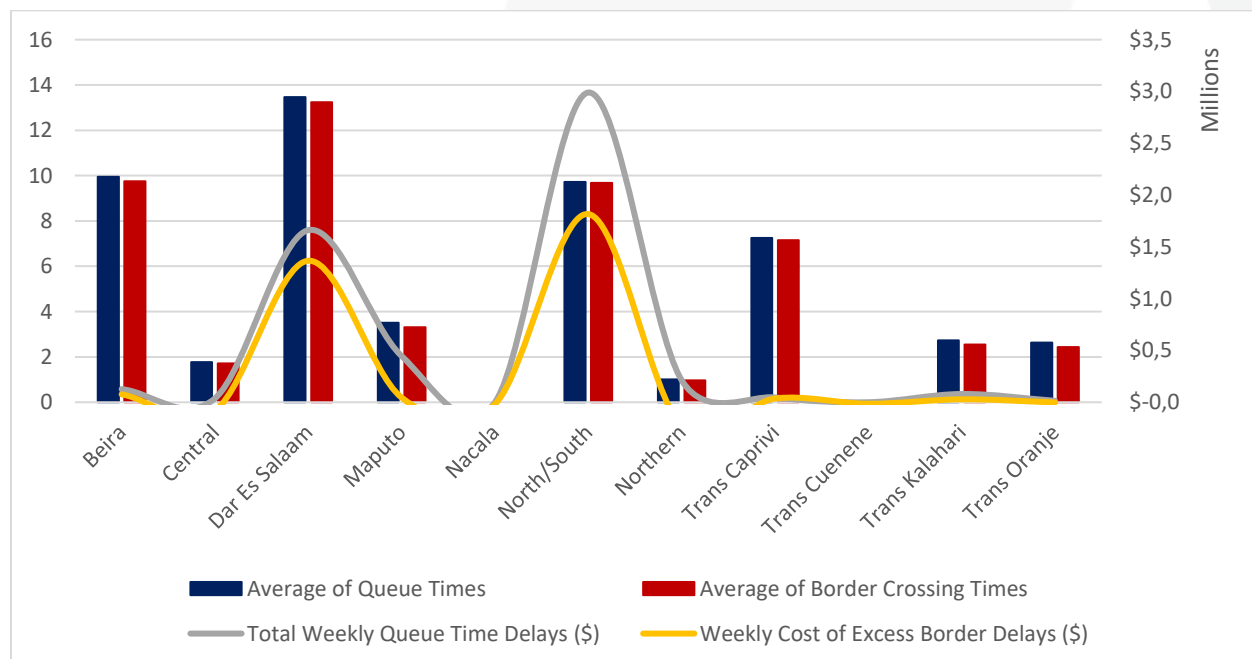
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 02/03/2025.

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 02/03/2025.

In summary, cross-border queue time averaged **~5,1 hours** (down by **~0,3 hours** from the previous week's **~5,5 hours**), indirectly costing the transport industry an estimated **\$5,6 million (R105 million)**. Furthermore, the week's average cross-border transit times hovered around **~5,1 hours** (down by **~0,6 hours** from the **~5,1 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$3 million (R56 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$8,6 million (R161 million)**, down by **~\$12 million or ↓6,7%** from **~\$20,6 million (R417 million)** in the previous report).

4. International Update

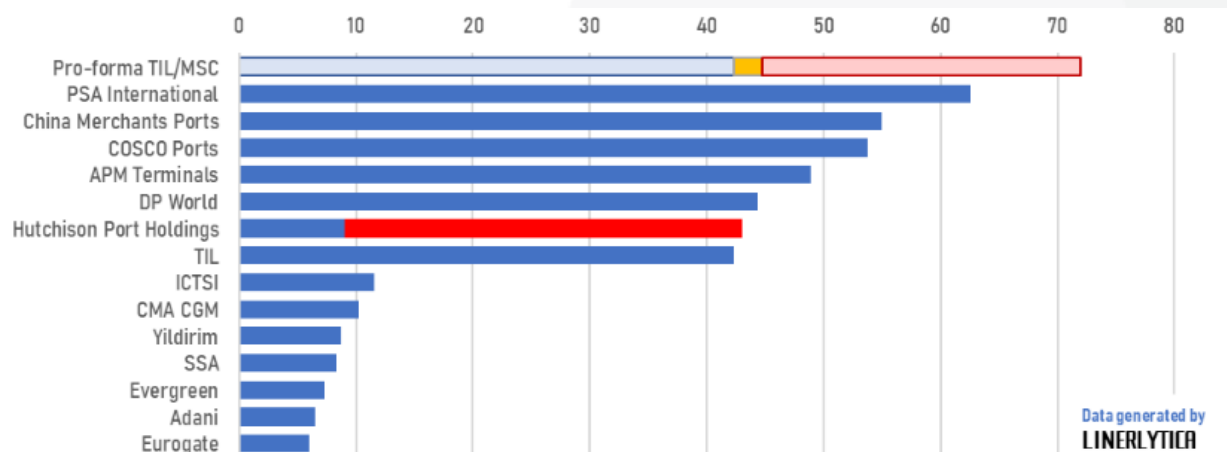
The following section provides some context around the global economy and its impact on trade, mainly an update on (a) the global shipping industry and (b) the global aviation industry.

a. Global shipping industry

i. Port terminal developments

In March 2025, Mediterranean Shipping Company (MSC), through its terminal operating subsidiary Terminal Investment Limited (TiL), partnered with BlackRock to acquire an **80% stake in Hutchison Ports'** international terminal portfolio, excluding operations in China and Hong Kong, for **\$22,8 billion**.¹⁰ This strategic acquisition encompasses 43 ports across 23 countries, including significant terminals such as Rotterdam, Felixstowe, Port Klang, Laem Chabang, and the Panamanian ports of Balboa and Cristobal. Consequently, MSC is poised to become the world's largest container terminal operator, surpassing its competitors with a combined equity-adjusted throughput exceeding **70 million TEU**:

Figure 15 – Global Container Terminal Operators (equity-adjusted throughput in millions of TEUs)



Source: [Linerlytica](https://linerlytica.com)

This expansion broadens MSC's global footprint and provides a more stable revenue stream than the volatile liner shipping sector. However, the transaction is subject to regulatory approvals in various jurisdictions, which may require divestments in regions like Northwest Europe and Panama to address competition concerns. The deal also aligns with geopolitical interests, particularly in Panama, where it addresses US concerns over Chinese influence in critical maritime infrastructure. In other terminal news, Singapore-based PSA International wound up its container terminal operations at India's Tuticorin Port at the weekend, causing a dent in the country's port privatisation programme.¹¹

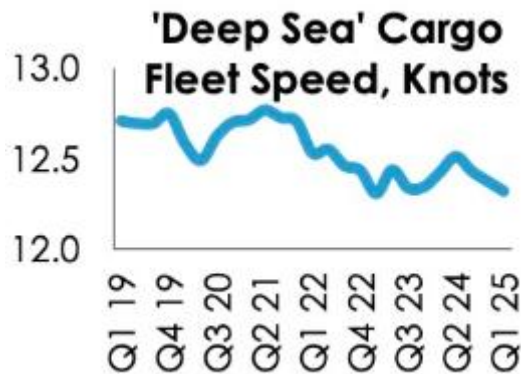
¹⁰ Linerlytica. 10/03/2025. [Market Pulse – Week 10](#).

¹¹ Mathias, A. 03/03/2025. [PSA completes early exit from box terminal concession at India's VOC](#).

ii. Slow steaming of deep-sea fleet

The deep-sea cargo fleet is operating at historically low speeds due to economic pressures and regulatory requirements to reduce carbon emissions, such as the Carbon Intensity Indicator (CII). Slow-steaming significantly reduces emissions, with a **↓10% speed decrease**, cutting emissions by almost **↓20%**.¹²

Figure 16 – Deep-sea fleet speeds (knots)



Source: [Clarksons Research via Splash 24/7](#)

Going forward, the industry must further integrate carbon reduction strategies, including slower speeds, into its roadmap, aligning with global initiatives like the EU's Carbon Border Adjustment Mechanism (CBAM) and other sustainability targets.

iii. Global freight and contract rates

Global container spot rates have continued their decline as Drewry's "World Container Index" dropped another **↓3,3%** (or **\$88**) and now trade at around **\$2 541 per 40-ft container**¹³. Despite implementing blanked sailings (Drewry's "Cancelled Sailings Tracker" has steadily trended around a **7% cancellation rate** of Pro-forma scheduling for 10 March to 13 April¹⁴) – especially on long-haul services¹⁵ – and general rate increases (GRIs), carriers have been unable to stop the decline in Asia-North Europe freight rates, with **slot utilisation dropping below 95% during** the post-Chinese New Year period. Indeed, the continuation of the rate decline has been evident since the start of the year:

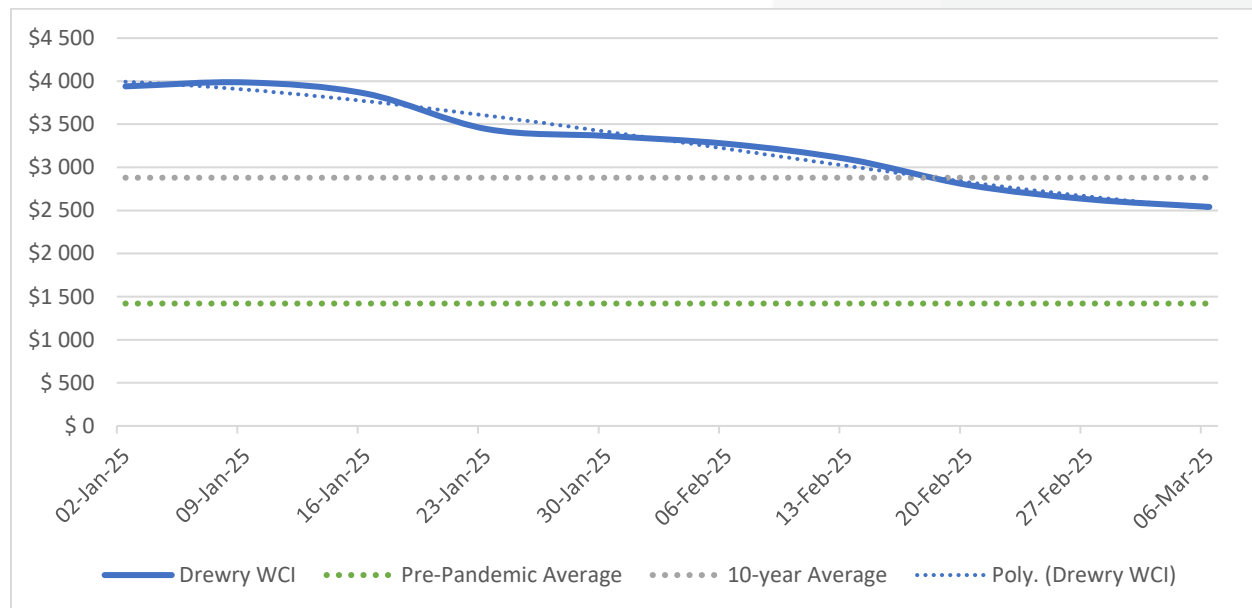
¹² Chambers, A. 10/03/2025. [Deep sea cargo fleet moving at record low speeds.](#)

¹³ Drewry. 07/03/2025. [World Container Index.](#)

¹⁴ Drewry. 28/02/2024. [Cancelled Sailings Tracker.](#)

¹⁵ Koo, A. 07/03/2025. [Liners cut long-haul sailings, but 'it won't be enough' to stop rates tumbling.](#)

Figure 17 – World Container Index (\$ per 40ft, YTD)



Source: Calculated from [Drewry](https://www.drewry.com/)

The industry expects a continuation over the next couple of weeks. Moreover, annually, only US-Europe rates rate up. Charter rates remain elevated elsewhere, as the *Harper Petersen Index* (Harpex) traded around **2 070 points (↑73%, y/y)** on Friday.

iv. Further developments of note

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

1. Industry financial results:

- Kuehne + Nagel (K+N):** In 2024, K+N reported a net turnover of **CHF24,8 billion**, marking a **↑4%** increase year-on-year; however, EBIT decreased by **↓13%** to **CHF1,6 billion**, and net earnings declined by **↓16%** to **CHF1,2 billion**.¹⁶
- DHL Global Forwarding:** Despite a strong fourth quarter, DHL Global Forwarding's full-year EBIT for 2024 was slightly over **€1 billion**, falling short of the **€1,4 billion** achieved in the previous year.¹⁷
- CMA CGM:** The group reported a revenue increase of **↑18%** in 2024, reaching **\$55,5 billion**, with EBITDA rising by **↑49%** to **\$13,4 billion**; however, there are concerns about potential challenges in the upcoming year.¹⁸

b. Global air cargo industry

Global air cargo capacity and tonnages increased in February, with total worldwide tonnages rising **↑5%** year-on-year. Capacity improvements were driven by gains from Asia Pacific (**↑8%**), Central and South America (**↑8%**), Europe (**↑4%**), and North America (**↑4%**), partially offset by a decline (**↓%**) from the

¹⁶ Lennane, A. 04/03/2025. [K+N 'still number-one' in air and ocean – but it's not all good news.](#)

¹⁷ Whiteman, A. 06/03/2025. [DHL Global Forwarding misses profit expectations, despite strong Q4.](#)

¹⁸ Lennane, A. 03/03/2025. [CMA CGM posts 'solid' 2024 results, but sees choppy waters ahead.](#)

Middle East & South Asia origins. Weekly tonnages have increased sequentially over four weeks, recovering to mid-January levels. Average worldwide rates climbed modestly, reaching **\$2,32 per kilogram**, a **↑6%** increase (y/y).

Figure 18 – 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%	+4%		-4%	-2%		-5%	+8%
Asia Pacific		+3%	+10%		+16%	+18%		+4%	+10%
C. & S. America		-6%	-2%		-13%	+4%		-4%	-2%
Europe		+4%	+3%		+4%	+3%		-1%	+0%
M. East & S. Asia		+3%	+2%		+3%	-7%		-1%	+6%
North America		+4%	+2%		-0%	+3%		-1%	-2%
Worldwide		+3%	+4%		+6%	+7%		+3%	+7%

Source: [World ACD](#)

Global spot rates stabilised at approximately **\$2,57/kg**, marking a **↑10%** year-on-year rise, with notable gains from Asia Pacific (**↑15%**), Europe (**↑7%**), and MESA (**↑6%**). Variations remain pronounced between routes; notably, tonnages from China and Hong Kong to the US fell **↓10%**, contrasting with a **↑4%** rise to Europe, alongside divergent pricing dynamics across these markets. The drop to the US is not surprising, as the see-saw of US trade relations is keeping shippers and logistics providers in a bind, while a US customs solution for e-commerce is a long way off.¹⁹

In other air cargo news, labour action continues to disrupt supply chains. A 24-hour strike by the Ver.di trade union on 10 March caused extensive disruptions at 13 major German airports, resulting in over 3 500 flight cancellations affecting approximately 560 000 passengers. The strike, involving public-sector, ground, and security staff, was part of ongoing wage negotiations, with the union demanding an **↑8%** pay increase, higher bonuses, and additional leave.²⁰

ENDS²¹

¹⁹ Putzger, I. 06/03/2025. [Shifting de minimis rules hobble firms' efforts to adjust supply chains](#).

²⁰ Todd, S. 07/03/2025. [Latest strike will cause 'massive' disruption at German airports](#).

²¹ **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.*