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Cargo Movement Update #213[1]

Date: 24 November 2024

Weekly Snapshot

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

Flows	Current[2]			Previous[3]			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs[4])	36 123	41 155	**77 278**	36 788	47 301	**84 089**	↓8%
Air Cargo (tons)	4 779	3 004	**7 783**	4 459	2 813	**7 272**	↑7%

Monthly Snapshot

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

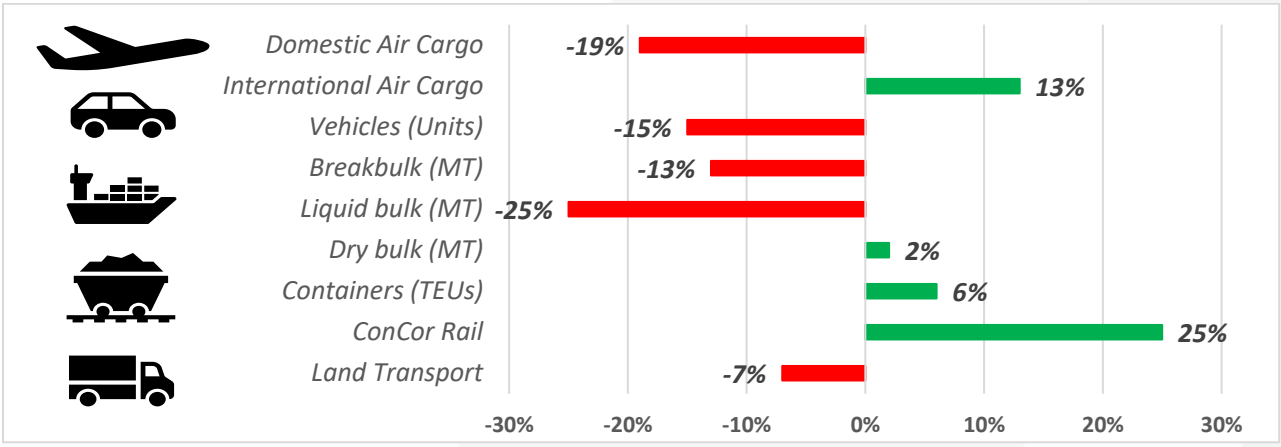
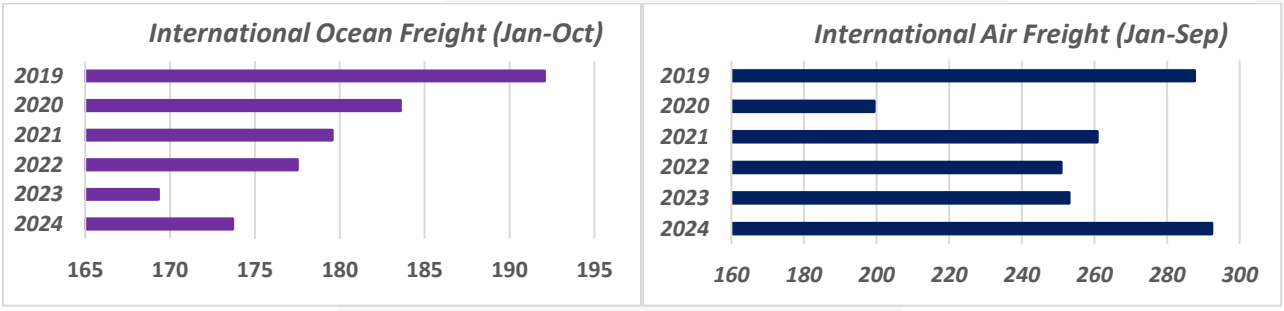


Figure 2 – Year-to-date flows 2019-2024[6]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~11 040 TEUs** was handled per day, with **~10 803 TEUs** projected for next week.
- TNPA stats for October: containers are down by a sizable ↓**29%** (m/m) but are up ↑**6%** (y/y). Bulk volumes are also down by ↓**17%** (m/m) and ↓**5%** (y/y). Vehicles are also down (↓**23%**, m/m and ↓**15%**, y/y).
- Rail cargo handled out of Durban was reported at **3 489** containers, up ↑**3%** from last week.
- Cross-border queue: ↑**0,2 hrs**; transit: ↑**0,6 hrs**; SA borders: **17,0 hrs** (↑**33%**); SADC: **5,0 hrs** (↑**2%**).
- Global container rates decreased by ↓**1%** (or **$27**), trading at **$3 413/40-ft**, as front-loading persists.
- Air cargo spot rates rapidly this week (↑**10%**, w/w & ↑**23%**, y/y), as volume and capacity remain stable.

[1] This update contains an overview of air, sea, and road freight to and from South Africa in the last week. This report is the *213th* update.
[2] '*Current*' means the last seven days (a week's) of available data.
[3] '*Previous*' means the preceding 8-14 days (a week) of available data.
[4] Container volumes are now reported in TEUs to align with TPT. Furthermore, we will change the period of reporting to Monday-Sunday, as per TPT.
[5] '*Monthly*' means the last months' worth of available data compared to the same month in the previous year—all metrics: Oct vs Oct.
[6] Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. In our container terminals, an average of **11 040 TEUs** was handled per day, down from **12 013 TEUs** last week. Port Operations this week were characterised by adverse weather conditions, vacant berths, and equipment breakdowns and shortages. Operations were delayed in Cape Town for more than 35 hours due to strong winds, while adverse weather and equipment breakdowns ensured operational delays in Durban. Vacant berths and inclement weather represented the main operational constraints at our Eastern Cape Ports, while operations were delayed in Richards Bay due to unavailable marine equipment and poor weather conditions. The Durban helicopter made a welcome return to service earlier this week after the breakdowns and fuel shortages experienced last week. Additionally, TNPA has also been impacted by the resignation of pilots who have been "head-hunted" from abroad, leaving a shortage of resources. Further, the latest reports indicate that the floating crane will be out of commission until around 26 November. Finally, minimal operational reports were received from TFR this week.

In the global container industry, MSC's extensive acquisition of second-hand containerships since 2020—over 420 vessels—has removed **17%** of the 800-15,000 TEU charter fleet, driving a sharp rebound in charter rates. Limited charter ship availability has pushed carriers to secure tonnage for delivery as late as 2026. Port congestion globally eased to **6,7% of the fleet**, with Durban showing improvement (queue-to-berth ratio: **0,83**). However, vessel blankings rose (**~10%**), and container freight rates declined further, with the US West Coast seeing sharp drops. Despite rate cuts, carriers plan December hikes ahead of year-end demand. Charter rates rose significantly, with the Harpex Index reaching **2 033 points** (**↑28%** w/w), reflecting market tightening amid sluggish new ship deliveries. Other developments included **(1)** Canadian ports reopen after labour strikes, and **(2)** global fragmentation means that shipping has seen the highest tonne-mile growth since 2010.

Air cargo volume handled at ORTIA continues to be elevated, as the daily average of air cargo handled at ORTIA in the previous week amounted to **682 776 kg** inbound (**↑7%**, w/w) and **429 095 kg** outbound (**↑7%**). Consequently, this week's increase resulted in a **↑13%** average increase over the figures registered last year (November 2023) and a similar increase over pre-pandemic levels (**↑15%** versus November 2019). Internationally, a sharp rise in air cargo spot rates from European origins, particularly to the Americas, has helped to further drive up average worldwide spot prices in the second full week of November, with rates to Brazil rising especially rapidly in the last two weeks, linked to congestion problems at São Paulo's Guarulhos International Airport (GRU). Elsewhere, IATA projects that hydrogen-powered aircraft could constitute **~18% of the global fleet by 2050**.

In the regional cross-border road freight trade, the average queue times increased by a **quarter of an hour** from last week, as the transit times also increased – by approximately **half an hour**. The median border crossing times at South African borders increased by more than **four hours**, averaging **17,0 hrs** (**↑33%**, w/w) for the week. In contrast, the greater SADC region (excluding South African controlled) largely stayed the same – increasing by a mere **ten minutes** and averaging **~5,0 hrs** (**↑2%**, w/w). On average, five SADC border posts took more than a day to cross – Beitbridge, Groblersbrug, Kasumbalesa (the worst affected, taking **almost two days** to cross from both sides), Oshikango, and Skilpadshek. Other developments included **(1)** Lebombo border protests, **(2)** Botswana border changes, **(3)** Beitbridge E-gates implementation, **(4)** Kopfontein border closure, and **(5)** vehicle clearance miscommunication.

Finally, the interesting findings of increased global fragmentation is critical to the country. Shipping connectivity is the lifeblood of South Africa's global trade and competitiveness. As the world grapples with

reduced capacity and longer shipping distances due to geopolitical and economic fragmentation, it is imperative for South Africa to recalibrate its international scheduling. Failure to do so risks compounding the premium paid to shipping lines for extended distances and undermining our ability to compete effectively. To safeguard our logistics network, we must prioritise restoring and strengthening our trade linkages and lanes to the levels of efficiency seen a decade ago. This requires addressing domestic inefficiencies, enhancing intra- and inter-port competition, and leveraging digitalisation to integrate activities and stakeholders seamlessly. By fostering collaboration and ensuring a resilient logistics framework, South Africa can remain a key player in global trade (especially the global South) while mitigating the risks of fragmentation. Proactive engagement – across the entire spectrum of stakeholders – is essential to reduce costs and maintain our strategic position in the evolving maritime landscape.

Contents

1. Ports Update

This section provides an overview of the flow of containerised cargo through our commercial ports.

a. Container flow overview

The following tables indicate the container flows reported for the last seven days. As previously mentioned, we have changed the reporting unit to TEUs and the week showing Mondays to Sundays to align with TPT.

Table 2 – Container Ports – Weekly flow reported for 18 to 24 November (measured in TEUs)

7-day flow reported (18/11/2024 – 24/11/2024)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 493	31 452	**↓2%**
New Pier (Pier 1)	2 072	14 501	**↓11%**
Cape Town Container Terminal	1 744	12 205	**↑7%**
Ngqura Container Terminal	1 962	13 736	**↓1%**
Port Elizabeth Container Terminal	104	729	**↓60%**
Other	665	4 655	**↓46%**
Total	**11 040**	**77 278**	**↓8%**

Source: Calculated from TPT, 2024. Updated 24/11/2024.

A decreased average of **~11 040 TEUs** (**↓8%**) was handled per day for the last week (*18 to 24 NovemberTable 2*, *Table 2*), compared to the projected average of **~10 803 TEUs** (**↓2%** actual versus projected) noted in last week's report.

For the coming week, a similar average of **~10 803 TEUs** (**↓2%**) is predicted to be handled (*25 November to 1 December, Table 3*). Port operations were mainly constrained by bad weather, a vacant berth, equipment breakdowns, and shortages.

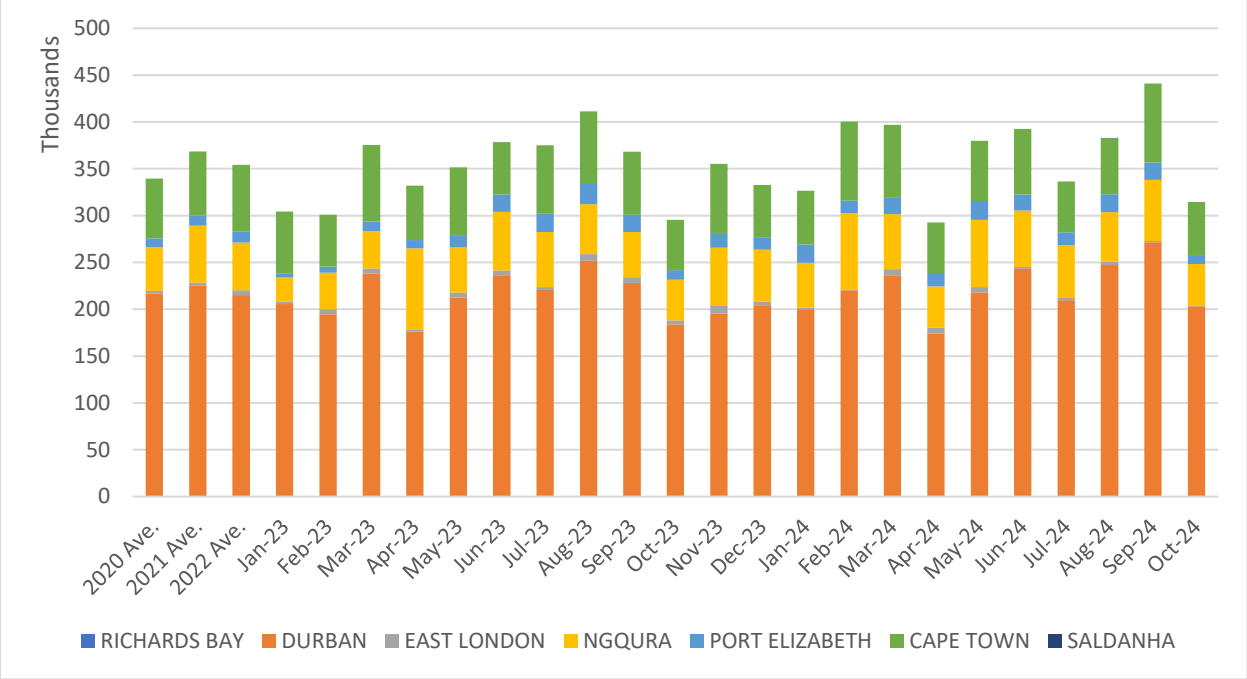
Table 3 – Container Ports – Weekly flow projected for 25 November to 1 December (measured in TEUs)

7-day flow reported (25/11/2024 – 01/12/2024)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 335	30 346	**↓4%**
New Pier (Pier 1)	1 588	11 118	**↓23%**
Cape Town Container Terminal	2 155	15 084	**↑24%**
Ngqura Container Terminal	1 799	12 592	**↓8%**
Port Elizabeth Container Terminal	224	1 570	**↑115%**
Other	702	4 912	**↑14%**
Total	**10 803**	**75 622**	**↓2%**

Source: Calculated from TPT, 2024. Updated 24/11/2024.

The following figure illustrates the *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

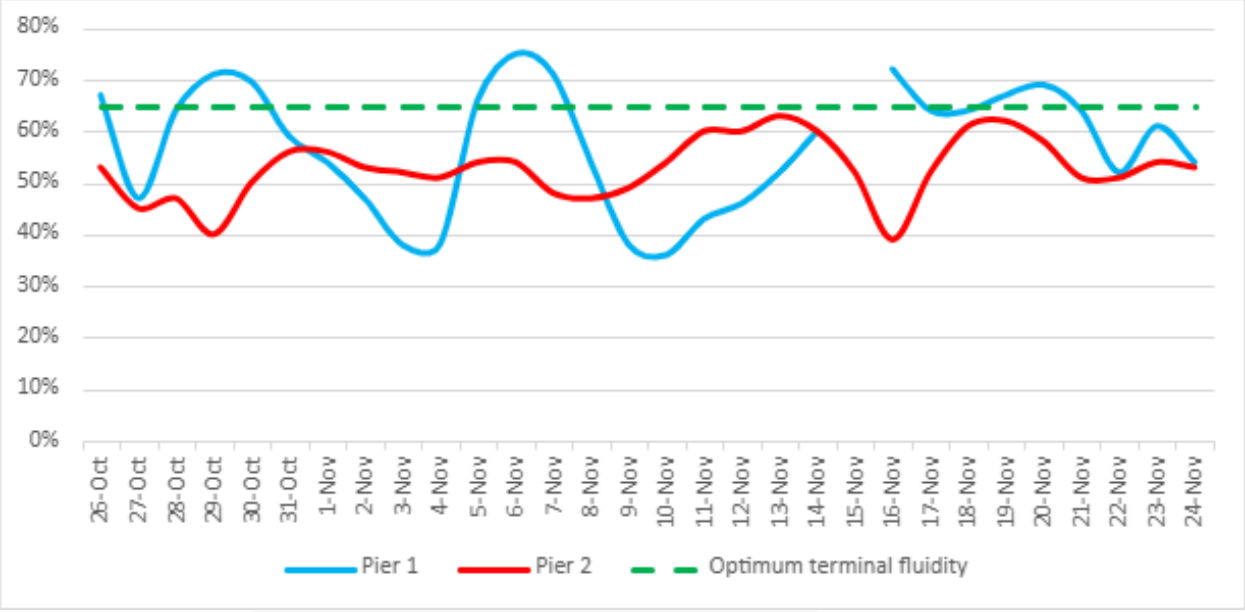
Figure 3 – Monthly flow reported for total container movement (TEUs 2020 to present, m/m)



Source: Calculated using data from TNPA, 2024, and updated 24/11/2024.

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

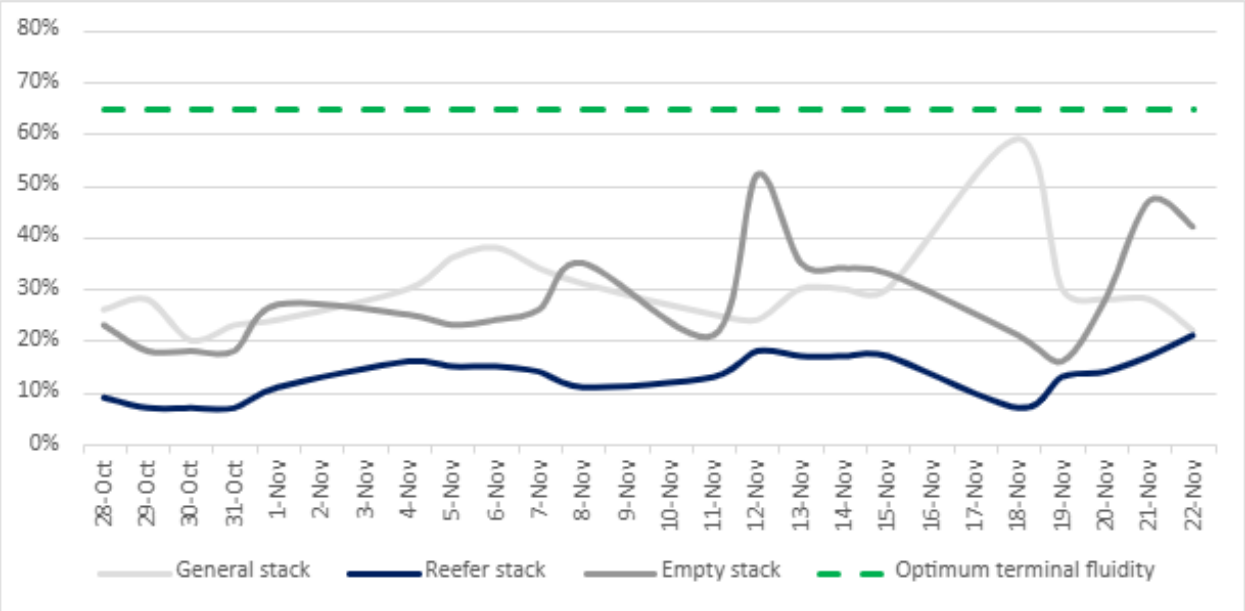
Figure 4 – Stack occupancy in DCT, general-purpose containers (25 October to present; a day on the day)



Source: Calculated using data from Transnet, 2024, and updated 24/11/2024.

The following figure shows daily stack occupancy in Cape Town over a similar period.

Figure 5 – Stack occupancy in CTCT, GP, reefer, and empty stack (28 October to present, day on day)



Source: Calculated using data from Transnet, 2024, and updated 24/11/2024.

b. TNPA: October update

TNPA has released consolidated port statistics for October[7], with a reduced throughput in every single sector. Containers decreased by a substantial **↓29%** (m/m), with the largest decreases from Port Elizabeth (**↓49%**), East London (**↓44%**), and Cape Town (**↓49%**). In the bulk sectors, which was down overall by **↓17%**, most sub-sectors decreased by **16-18%**, as **56 384 vehicles** were moved, although the entire industry was down by **↓23%** from September. All in all, the numbers for October were less encouraging than the previous two months. Here is a breakdown of the respective changes versus September:

Table 4 – TNPA – Monthly volume and growth: October 2024

	Sep	Oct	Movement	m/m, %
Containers (TEUs)	**441 182**	**314 680**	**-126 502**	**-29%**
Landed	216 447	156 290	-60 157	-28%
Shipped	224 735	158 390	-66 345	-30%
Dry bulk (MT)	15 347 571	12 667 473	-2 680 098	-17%
Liquid bulk (MT)	3 185 844	2 628 067	-557 777	-18%
Breakbulk (MT)	742 638	626 931	-115 707	-16%
Vehicles (Units)	73 040	56 384	-16 656	-23%
Total cargo (excl. Vehicles)	**19 276 053**	**15 922 471**	**-3 353 582**	**-17%**

Source: TNPA, updated 20/11/2024.

Transnet Port Terminals handled **15,9 million metric tonnes** of bulk cargo during October, down by nearly **3,4 million tonnes** from last month and around **↓8%** below the average handled monthly since the start of

[7] Transnet. 2024. Port statistics.

2022. The following table shows the comparative overview for October versus last year, including the view versus the same month in the pre-pandemic year of 2019:

Table 5 – TNPA – Cyclical volume and growth: October 2019, 2023, and 2024

	2019	2023	2024	Growth: '19-'24	Growth: '23-'24
Containers (TEUs)	**387 616**	**295 546**	**314 680**	**-19%**	**6%**
Landed	196 680	152 074	156 290	-21%	3%
Shipped	190 936	143 472	158 390	-17%	10%
Dry bulk (MT)	14 671 423	12 449 298	12 667 473	-14%	2%
Liquid bulk (MT)	3 841 437	3 515 868	2 628 067	-32%	-25%
Breakbulk (MT)	319 830	722 195	626 931	96%	-13%
Vehicles (Units)	67 649	66 063	56 384	-17%	-15%
Total cargo (excl. Vehicles)	**18 832 690**	**16 687 361**	**15 922 471**	**-15%**	**-5%**

Source: TNPA, updated 20/11/2024.

Cyclical throughput was low in October, as the throughput of containers (↓**19%**—but up by ↑**6%** y/y) and total bulk cargo (↓**15%** and ↓**5%**) mainly was below last year's and pre-pandemic levels. Overall, there have been some positive developments lately—and October is not typically a bumper month—but the reality is that the South African ports economy still has a long way to go before returning to the highs of 2017/2018 and beyond.

c. Summary of port operations

i. Weather and other delays

- Operations were delayed in Cape Town for more than 35 hours due to strong winds.
- Adverse weather and equipment breakdowns ensured operational delays in Durban.
- Vacant berths and inclement weather represented the main operational constraints at our Eastern Cape Ports.
- Operations were delayed in Richards Bay due to unavailable marine equipment and poor weather conditions.

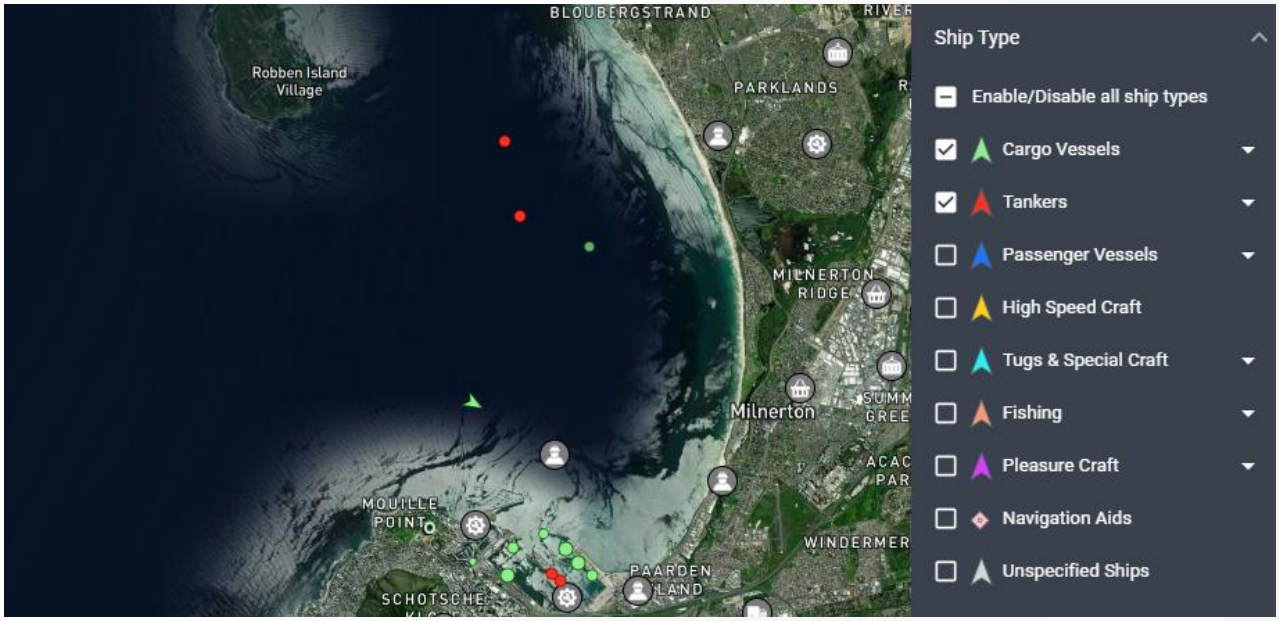
ii. Cape Town

On Friday, CTCT recorded three vessels at berth and zero at anchor, as inclement weather conditions prevented optimal performance at the terminal this week. Between Monday and Friday, on the landside, the terminal managed to service 3 580 trucks while handling approximately 449 rail units. On the waterside, the terminal executed approximately 5 356 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 22%**, **reefers at 21%**, and **empties at 42%**. Additionally, the terminal operated with **eight STS cranes**, **23 RTGs**, and **68 hauliers** towards the end of the week. Crane LC6 was out of commission most of the week, and no ETR has been communicated yet.

On Friday, CTMPT recorded two vessels at berth but zero vessels at anchor. In the preceding 24 hours, the terminal handled around 465 TEUs and 5 649 tons of maize across the quay. On the landside, 116 trucks were processed during the same period. Towards the end of the week, stack occupancy was recorded at 31% for general cargo, 56% for reefers, and 3% for empties. The latest reports suggest that all three cranes, accompanied by three straddle carriers, were operational towards the end of the week.

The FPT terminal handled five vessels from 11 to 17 November, including one breakbulk, one dry bulk, and three layby vessels. Berth occupancy during this period was 50%. The terminal planned to handle six vessels between 18 and 24 November, with another five vessels scheduled for 25 November to 01 December. Adverse weather conditions and the late arrival of trucks constituted the majority of delays at the terminal during the week.

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



Source: Marine Traffic. Updated 24/11/2024 at 14:00.

iii. Durban

On Friday, Pier 1 recorded two vessels on berth, operated by three gangs, with another four at anchor. Two STS cranes, QC3 and QC5, were expected to return to service before the weekend. Stack occupancy was **61%** for **GP containers**. Between Monday and Friday, the terminal executed approximately 6 212 gate moves on the landside. The **average TTT** for the week was **~85 minutes** (**↓8%**, w/w) and an average **staging time** of **~75 minutes** (**↓23%**). Additionally, the terminal moved approximately 6 000 TEUs across the quay on the waterside during the same period. The terminal operated with **five STS cranes** for most of the week and had **14 RTGs** in service towards the end of the week. Seven new rubber tyred gantries are currently being assembled at Pier 1.

Pier 2 had four vessels on berth and another four at anchorage on Friday, as adverse weather and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **51%** for **GP containers**. The terminal operated with **11 gangs** and moved approximately 11 000 containers across the quay between Monday and Friday on the waterside. During the same period, there were approximately 9 754 gate moves on the landside, with an **average TTT** of **~106 minutes** (**↑13%**, w/w) and a staging time of **~109 minutes** (**↑48%**) for the week. Approximately 2 136 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **42** and **48** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **51%** during this period.

News from DCT Pier 2 is that the first four new straddle carriers of the expedited order for twenty landed at the terminal during week 47. Assembly will commence shortly. The balance of sixteen are planned to arrive in tranches of four during Q1 2025.

The port helicopter made a welcome return to service earlier this week after the breakdowns and fuel shortages experienced last week. Additionally, TNPA has also been impacted by the resignation of pilots who have been “head-hunted” from abroad, leaving a shortage of resources at TNPA. Further, the latest reports indicate that the floating crane will be out of commission until around 26 November.

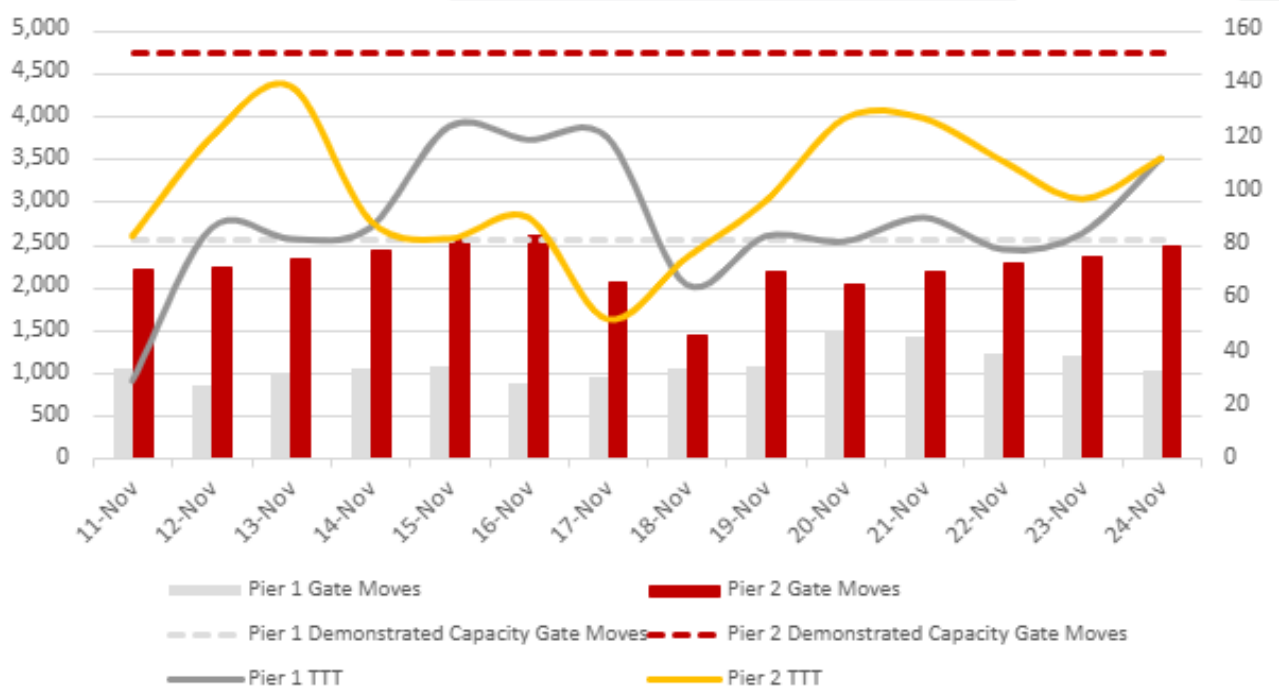
Durban's MPT terminal recorded three vessels at berth on Thursday and one at the outer anchorage. Stack occupancy for containers was 73%, with the breakbulk stack at 45%. In the preceding 24 hours, the terminal handled 290 containers and 2 103 tons of breakbulk on the waterside. On the landside, 395 container trucks and 48 breakbulk RMTs were serviced. During this period, two cranes, eight reach stackers, nine forklifts, and 18 ERFs were in operation. The latest reports suggest Cranes 04 and 06 are running breakdowns with no ETR communicated yet.

On Wednesday, the Maydon Wharf MPT recorded one vessel at berth and none at anchor. On the waterside, 1 732 tons were handled across the quay. On the landside, 44 trucks containing around 1 576 tons were handled on the waterside between Tuesday and Wednesday. The next vessel destined for the Agri-bulk facility is scheduled for arrival on 04 December.

On Thursday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with zero vessels at anchorage. In the 24 hours before, the terminal handled 2 514 road and 339 rail units on the landside while handling 2 005 units on the waterside. Overall stack occupancy was 90% (Exports: 44%, Imports: 50%, Transshipments: 7%), 60% at Q&R, and 40% at G-berth. During this period, the terminal had 142 high-and heavies (abnormal loads) on hand and managed to handle 80.

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.

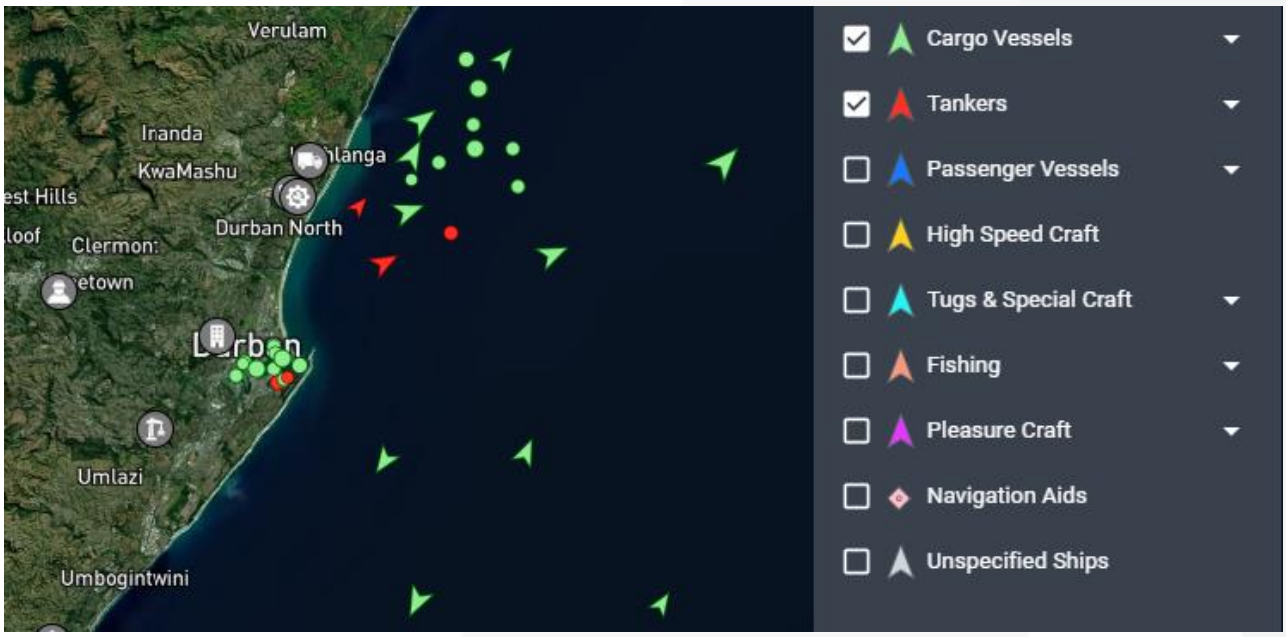
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 24/11/2024.

The queue of container vessels waiting outside Durban has remained relatively stable (see the *Linerlytica* assessment below) in the last few weeks. At midday on Friday, **four** vessels were waiting for Pier 2, **four** for Pier 1, and **one** for Point terminal, with a current estimation of **at least five additional days added to the schedules** (stable from last week). More precisely, at the end of Monday, TPT reported that the average container vessel waiting time at anchorage at Pier 1 was **5,5 days** and **7 days** at Pier 2. The following is a snapshot of the port and vessels waiting to berth:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 24/11/2024 at 14:00.

iv. Richards Bay

On Friday, Richards Bay had 14 vessels at anchor and 13 on the berth, translating to six vessels at DBT, three at MPT, four at RBCT, and none at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources. During the same period, the coal terminal had four vessels at berth and three at anchor, handling **179 156 tons** on the waterside. The daily average for the week was around **204 400 195 200 tons** (↓**5%**, w/w). However, 20 trains were serviced on the landside, just short of the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded three vessels on berth but zero at anchor, with none drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation 24 hours before. Stack occupancy figures were recorded at 9% for reefers, 23% for reefer ground slots, and 28% for the general stack. Despite conceding some operational hours to rainy weather, the terminal handled approximately 2 754 TEUs on the waterside. Approximately 565 trucks were processed on the landside at an average TTT of ~33 minutes. Towards the end of the week, the terminal had six STS cranes, 22 RTGs, and 44 hauliers in service.

On Friday, 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. Despite experiencing weather- and equipment challenges, 62 trucks were processed at a TTT of ~18 minutes on the landside, while 729 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 24% for

the general stack, 1% for reefers, and 21% for reefer ground slots. Additionally, towards the end of the week, the terminal had one STS crane, one mobile harbour crane, and ten straddles available.

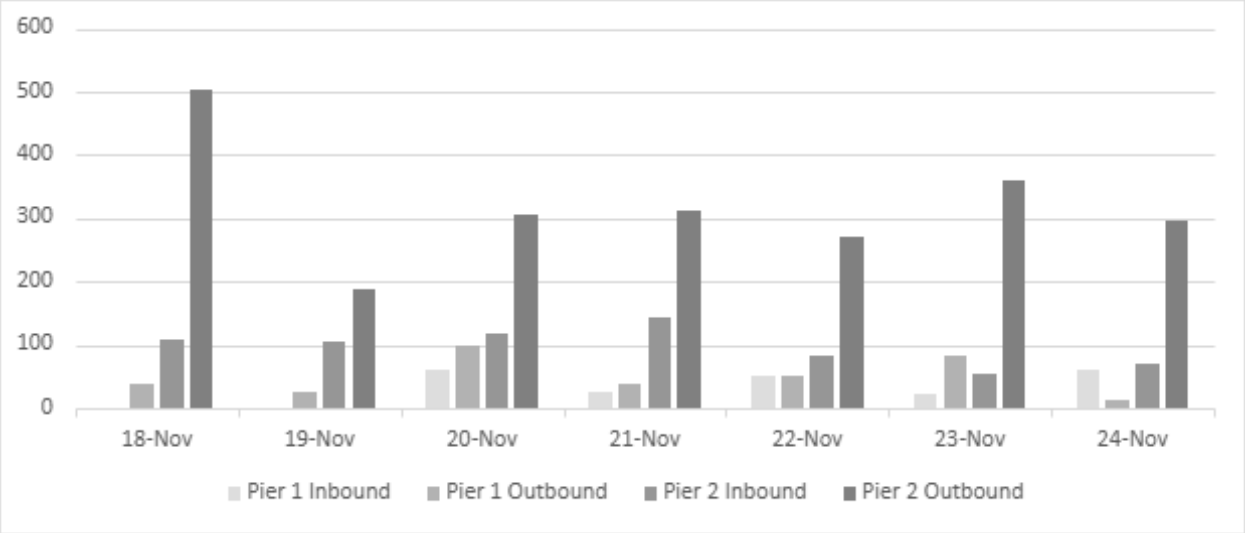
vi. Saldanha Bay

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

vii. Transnet Freight Rail (TFR)

Minimal operational reports were received from TFR this week; however, DCT Pier 2 had 67 ConCor units on hand with a dwell time of 72 hours and 121 over-border units with a dwell time of 12 days towards the end of the week. Rail containers on hand in Durban were reported as follows: Point: 69, Pier 1: 110, Pier 2: 190.

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



Source: Calculated using data from Transnet, 2024. Updated 24/11/2024.

In the last week (*18 to 24 November*), rail cargo handled out of Durban was reported at **3 489** containers, up by **↑3%** from the previous week's **3 387** 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 11 November. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *November 2023* averaged **~984 921 kg** per day.

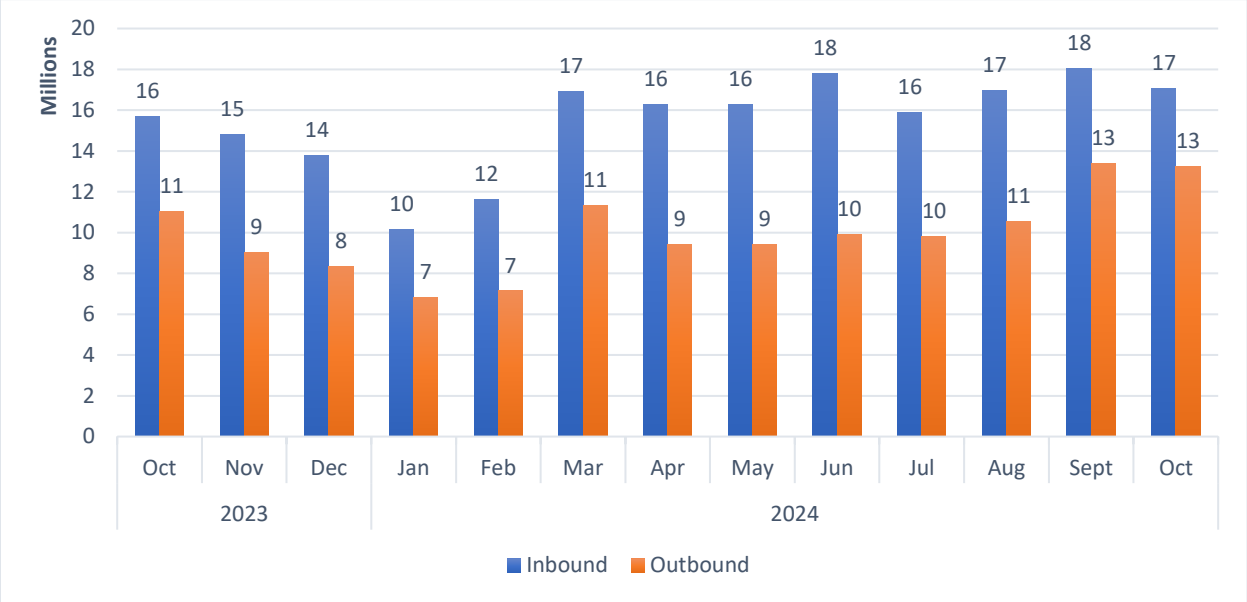
Table 6 – International inbound and outbound cargo from OR Tambo

Flows	11-Nov	12-Nov	13-Nov	14-Nov	15-Nov	16-Nov	17-Nov	Week
Volume inbound	494 097	223 120	453 060	236 387	461 486	354 994	2 556 285	**4 779 429**
Volume outbound	225 228	193 804	187 337	198 373	262 067	190 974	1 745 885	**3 003 668**
Total	**801 186**	**86 878**	**681 608**	**434 341**	**675 870**	**443 287**	**3 465 090**	**7 783 097**

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

The daily average of air cargo handled at ORTIA in the previous week amounted to **682 776 kg** inbound (**↑7%**, w/w) and **429 095 kg** outbound (**↑7%**). Consequently, this week's increase resulted in a **↑13%** average increase over the figures registered last year (November 2023) and a similar increase over pre-pandemic levels (**↑15%** versus November 2019). The following statistics show the continued volume increase since the start of 2023:

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

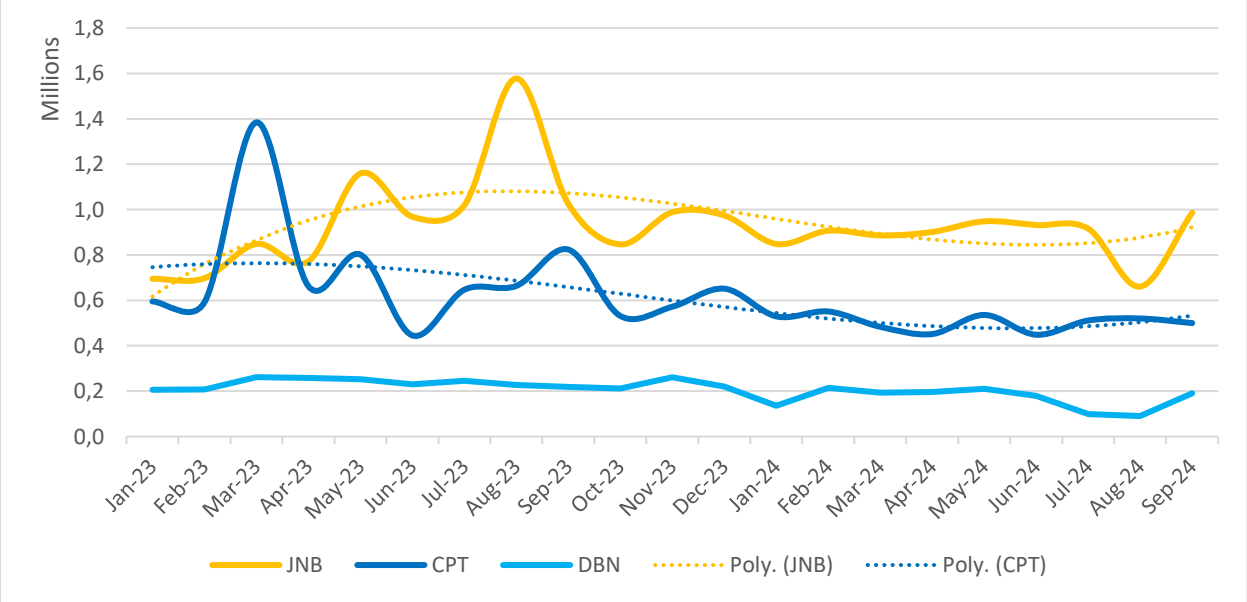


Courtesy of ACOC. Updated: 25/11/2024.

b. Domestic air cargo

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



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

3. Road and Regional Update

a. Cross-border and road freight delays

This week, the following points should be noted regarding challenges and delays on roads in South Africa and the surrounding SADC region.

- The median border crossing times at South African borders increased by more than **four hours**, averaging **17,0 hrs** (**↑33%**, w/w) for the week.
- In contrast, the greater SADC region (excluding South African controlled) largely stayed the same – increasing by a mere **ten minutes** and averaged **~5,0 hrs** (**↑2%**, w/w).

1. **Lebombo border protests:**
   - Mozambique authorities intermittently halted processing at Lebombo on Friday last week due to protests.
   - While operations resumed sporadically during the week, no violence or property damage reports have occurred.
2. **Botswana border changes:**
   - Botswana has discontinued using the Consolidated Cargo code (9999), requiring Clearing Agents to issue separate RITs for each entry.
   - This change significantly increases costs for transporters, with fees now around R900 per RIT, compared to the previous R1 160 for an entire consignment.
   - Some loads could incur costs for up to 50 entries.
   - Queues have worsened, with Skilpadshek Northbound reaching 10 km on Saturday.
3. **Beitbridge e-gates implementation:**
   - Zimbabwe has installed E-gates for residents with E-passports, set to be operational by December.
   - These are expected to ease traveller processing during the peak season. However, crossing times remain affected due to mandatory truck scans.
   - On a positive note, FESARTA's intervention resolved procedural delays at Condep, ensuring seamless continuation of Pending Entries (PEs) between shifts.
4. **Kopfontein border closure:**
   - The Kopfontein border is currently closed due to a BURS system outage.
   - Additional delays were noted with SARS EDI responses and Namibia's Asycuda system, though these issues have been partially resolved, with responses still slower than usual.
5. **Vehicle clearance miscommunication:**
   - Police erroneously informed a transporter in Gauteng that a vehicle clearance form was required for cross-border transport.
   - FESARTA intervened and clarified that this requirement does not apply to commercial vehicles.

The following table shows the changes in bidirectional flows through South African borders, with the subsequent table showing the consolidated corridor movements:

Table 7 – Delays[8] summary – South African borders (both directions)

Border Post	Direction	HGV[9] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	490	28,4	8,0	28,0	14 700	3 430
Beitbridge	Zimbabwe-SA	446	16,2	2,2	16,1	13 380	3 122
Groblersbrug	SA-Botswana	235	32,8	1,2	33,0	7 050	1 645
Martins Drift	Botswana-SA	227	7,3	1,4	7,2	6 810	1 589
Kopfontein	SA-Botswana	245	13,9	2,2	13,6	7 350	1 715
Tlokweng	Botswana-SA	43	0,1	0,2	0,4	1 290	301
Vioolsdrift	SA-Namibia	30	4,3	1,1	4,2	900	210
Noordoewer	Namibia-SA	20	1,9	0,4	1,6	600	140
Nakop	SA-Namibia	30	4,5	1,2	4,3	900	210
Ariamsvlei	Namibia-SA	20	1,0	0,4	1,0	600	140
Skilpadshek	SA-Botswana	241	28,3	8,2	28,0	7 230	1 687
Pioneer Gate	Botswana-SA	87	1,4	0,0	0,0	2 610	609
Lebombo	SA-Mozambique	723	8,4	1,2	8,2	21 690	5 061
Ressano Garcia	Mozambique-SA	125	1,9	0,3	1,5	3 750	875
Sum/Average		**2 962**	**10,7**	**2,0**	**10,5**	**88 860**	**20 734**

Source: TLC, FESARTA, & Crickmay, week ending 17/11/2024.

Table 8 – 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	11,1	1,9	11,1	9 600	2 240
Central Corridor	798	1,0	0,4	0,9	23 940	5 586
Dar Es Salaam Corridor	1 819	6,7	1,5	6,6	54 570	12 733
Maputo Corridor	848	5,2	0,7	4,9	25 440	5 936
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 758	9,8	1,2	11,3	112 740	26 306
Northern Corridor	2 817	1,4	0,1	1,4	92 520	21 588
Trans Caprivi Corridor	116	21,5	3,1	21,1	3 480	812
Trans Cunene Corridor	100	19,1	5,2	19,0	3 000	700
Trans Kalahari Corridor	358	8,6	2,2	8,0	10 740	2 506
Trans Oranje Corridor	100	2,9	0,7	2,8	3 000	700
Sum/Average	**11 161**	**6,0**	**1,0**	**6,3**	**342 840**	**79 996**

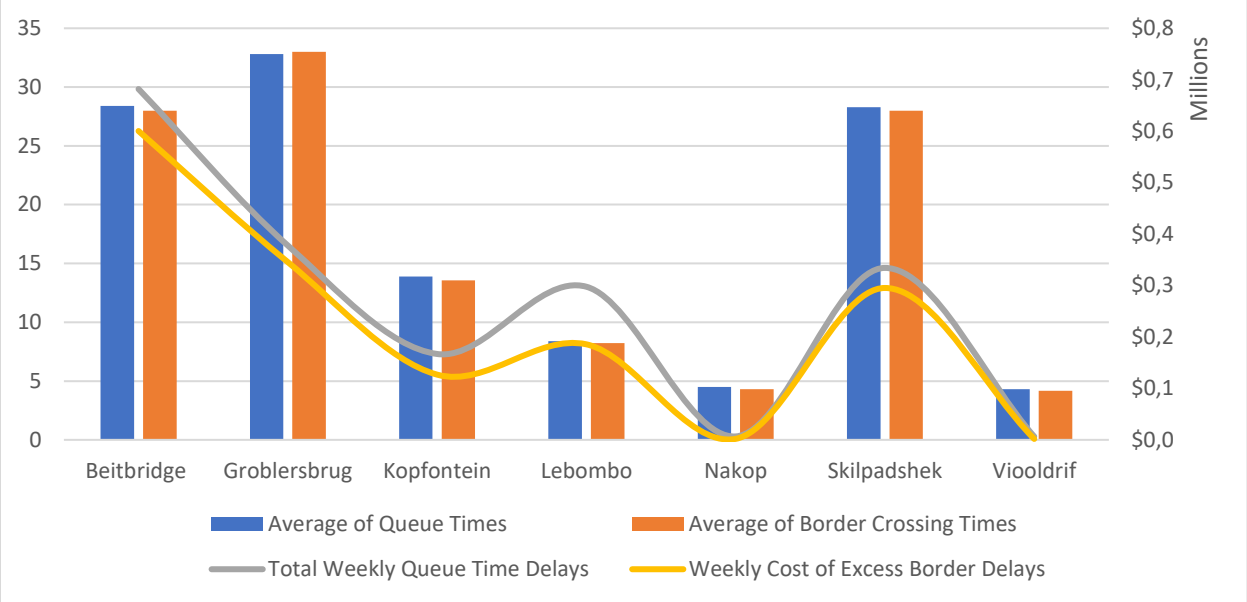
Source: TLC, FESARTA, & Crickmay, week ending 17/11/2024.

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

[8] It should be noted that the root cause of the reported delays is uncertain and variable at this point. Moreover, the delays may be multiple and widely distributed. Therefore, they cannot be exclusively attributed to a specific common cross-border problem since we do not have a transparent view of the entire border process in granular detail. The causes of these bottlenecks typically include poor infrastructure, road congestion, and a lack of coordination between neighbouring countries and Customs (or OGA) stops, among other trade obstacles—data provided by the LMS (Logistics Monitoring System), which Crickmay produces in collaboration with SAAFF. Transporters, traders, and cargo owners are encouraged to use the non-tariff barrier (NTB) online tool UNCTAD and the AfCFTA Secretariat developed. However, given that platform's questionable effectiveness, transporters are encouraged to contact FESARTA and join their TRANSIST Bureau, arguably providing better and more reliable information.

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

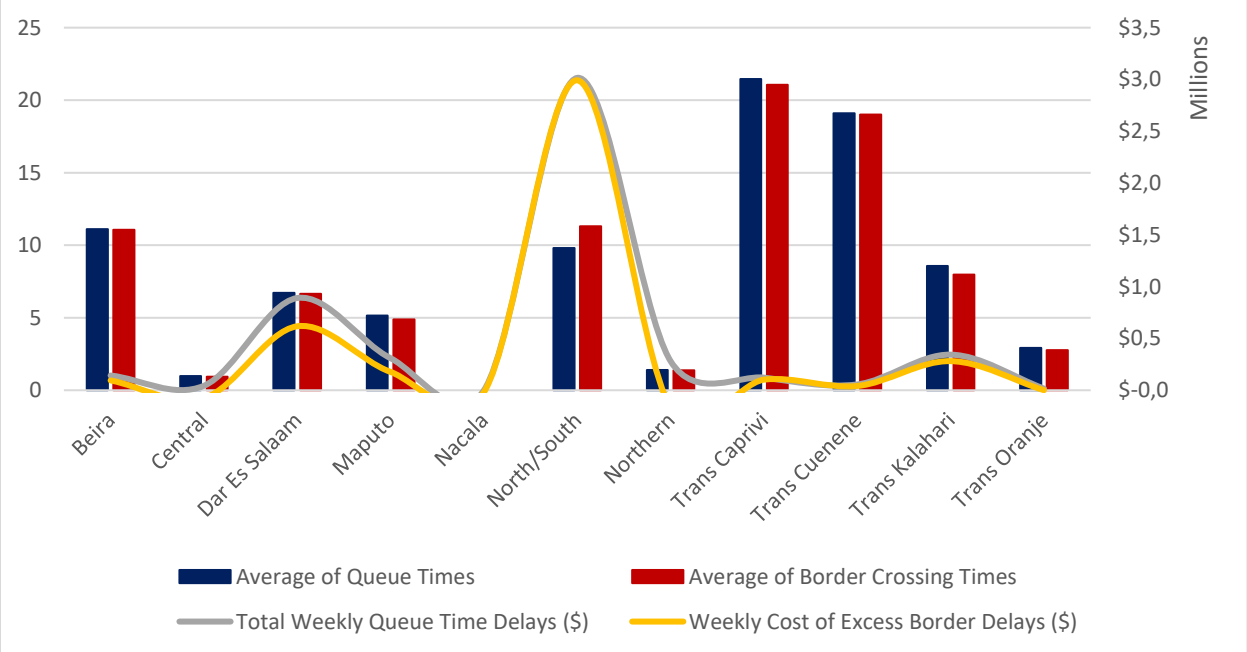
Figure 12 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 17/11/2024.

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

Figure 13 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 17/11/2024.

In summary, cross-border queue time averaged **~6,0 hours** (up by **~0,2 hours** from the previous week's **~5,8 hours**), indirectly costing the transport industry an estimated **$5,2 million** (**R94 million**). Furthermore, the week's average cross-border transit times hovered around **~6,3 hours** (up by **~0,6 hours** from the **~5,7 hours** recorded in the previous report), at an indirect cost to the transport industry of **$4,0 million** (**R73 million**). As a result, the total indirect cost for the week amounts to an estimated **~$9,3 million** (**R167 million**, up by **~R11 million** or **↑6,3%** from **~R178 million** in the previous report).

4. International Update

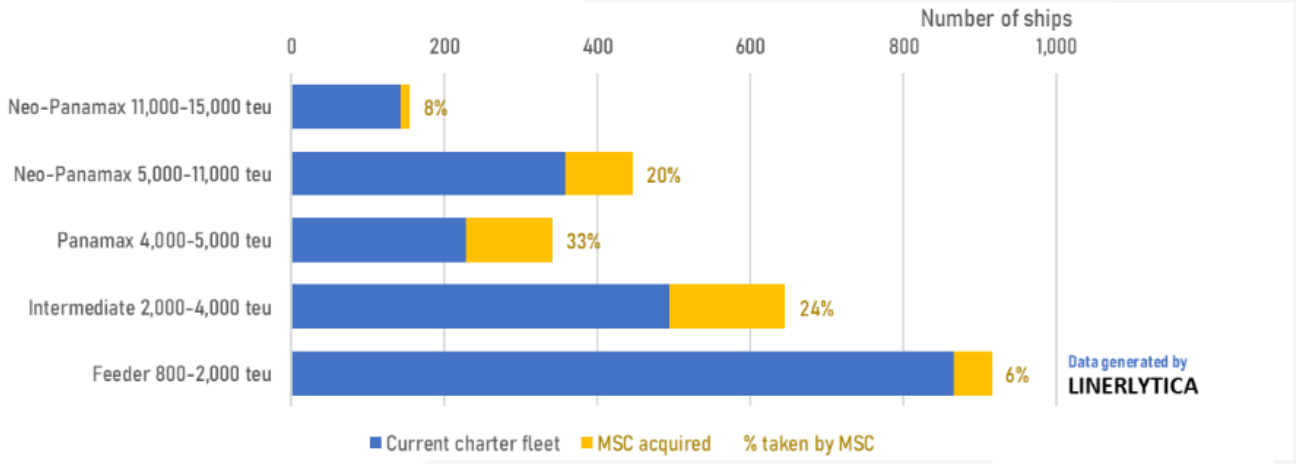
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry and **(b)** the global aviation industry.

a. Global shipping industry

i. Global container fleet and summary

MSC's sweep of second-hand containership tonnage since 2020 has brought its total resale vessel acquisitions in the last four years to more than 420 ships. MSC's unprecedented acquisition spree has removed more than **17% of the total fleet** available for charter in the **800** to **15 000 TEU** size segment. This year, it has been a critical driver behind the sharp rebound in charter rates. The shortage of charter market ships has forced carriers to fix forward for their favoured tonnage, with deliveries stretching into H2 2025 and early 2026:

Figure 14 – Container charter fleet versus MSC acquisitions (2000 to 2024)



Source: Linerlytica

Consequently, The pace of new ship deliveries have slowed to less than 130 000 TEU in the past 30 days, setting the stage of further firming of the charter market (see below) that continues to defy the recent slump in the freight market. MSC is largely responsible for the shrinkage in the charter fleet.

Elsewhere, port congestion has eased somewhat in recent weeks and hovers around the **2,07 million TEU mark**, accounting for **6,7% of the global fleet**.[10] In South Africa, port congestion at the Port of Durban slightly decreased this week, as some capacity is waiting to be off-loaded currently outside at anchorage (some **27 475 TEU**). Nevertheless, the queue-to-berth ratio at Durban decreased to **0,83** late on Sunday.[11] Lastly, vessel blankings have increased, as Drewry's "*Cancelled Sailings Tracker*" trended at a **~10% cancellation rate** for the next round of pro-forma scheduling (25 November to 29 December).[12]

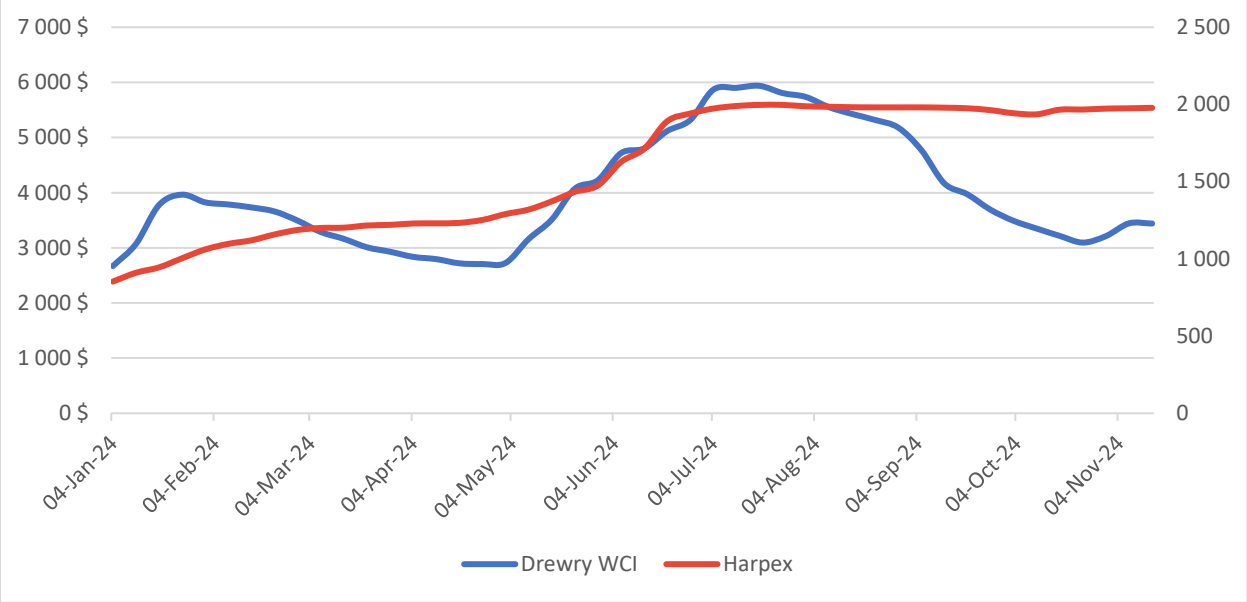
ii. Global container freight rates and global carrier profits

Container freight rates continue to slip, with cargo front-loading ahead of the new Trump tariffs, providing little relief to the market. The US West Coast suffered the sharpest rate drops despite healthy volumes being recorded from Asia as capacity deployed continues to outpace the rise in demand. Carriers are targeting a fresh round of rate hikes in December with support from a rise in cargo volumes ahead of the US tariff hikes and the year-end shipping rush. Drewry's "*World Container Index*" decreased by **↓1%** (or **$27**), trading at **$3**

[10] Linerlytica. 25/10/2024. Market Pulse 2024 Week 48.
[11] Linerlytica. 25/11/2024. Port Congestion Watch.
[12] Drewry. 22/11/2024. Cancelled Sailings Tracker.

413 per 40-ft container.[13] Charter rates saw a significant increase, as the *Harper Petersen Index* (Harpex) breached the 2 000-point mark and traded around **2 033 points** (**↑28%,** w/w) on Friday. The following illustration shows the spot – and charter developments since January:

Figure 15 – World Container Index and Charter rates (YTD, $ per 40ft, 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. **Canadian ports reopen:**
    a. Following a back-to-work order, Canadian ports have resumed operations after recent strikes but are now contending with significant container backlogs and potential detention and demurrage charges for shippers.[14]
    b. The Montreal Port Authority reported over 5 000 TEUs on the ground and 22 vessels awaiting entry, while the Vancouver Fraser Port Authority noted several commercial vessels offshore, leading to anticipated delays and congestion in the supply chain.
2. **Global fragmentation means that shipping has seen the highest tonne-mile growth since 2010:**
    a. The Red Sea shipping crisis and the Panama drought have driven the fastest growth in tonne-miles since 2010, with global seaborne trade on track to grow **↑6,5%** this year, reaching **66,6 trillion tonne-miles**.[15]
    b. Increased trade complexity and fragmentation, as highlighted by Clarksons Research and industry experts, are driving demand for more ships to move the same volume of cargo, pushing freight rates and profits to highly profitable levels.

[13] Drewry. 21/11/2024. World Container Index.
[14] Goldstone, C. 19/11/2024. Back to work order sees Canadian ports reopen to a battle against backlogs.
[15] Chambers, S. 25/11/2024. Shipping toasts best year for tonne-mile growth since 2010.

c. This fragmentation has particularly boosted containership earnings, with liner shipping profits soaring to unprecedented highs, exceeding **$26,8 billion in Q3 alone**.

b. Global air cargo industry

The latest air freight market analysis by World ACD reveals significant spot rate increases, mainly from Europe, where rates rose by **↑10%** (w/w) and **↑23%** (y/y), driven by a buoyant transatlantic market and capacity reductions with the winter schedules. Europe-to-Brazil spot rates surged by **↑57%** in just two weeks due to congestion at GRU airport. Meanwhile, rates from Asia Pacific markets remained relatively strong, with modest weekly increases in Europe but slight declines in the USA. Overall, global spot prices are **↑25%** (y/y), with notable growth in The Middle East and South Asia markets (**↑73%**) and ex-Asia Pacific (**↑22%**), alongside stable capacity planning (**↓1%**), averting sharp seasonal rate spikes. In the last few weeks, there has been a slight decrease in cargo volumes (**↓1%**):

Figure 16 – Capacity, weight, and rates by region (last 2 to 5 weeks, y/y % change)

Origin Regions
last 2 to 5 weeks
WORLD ACD

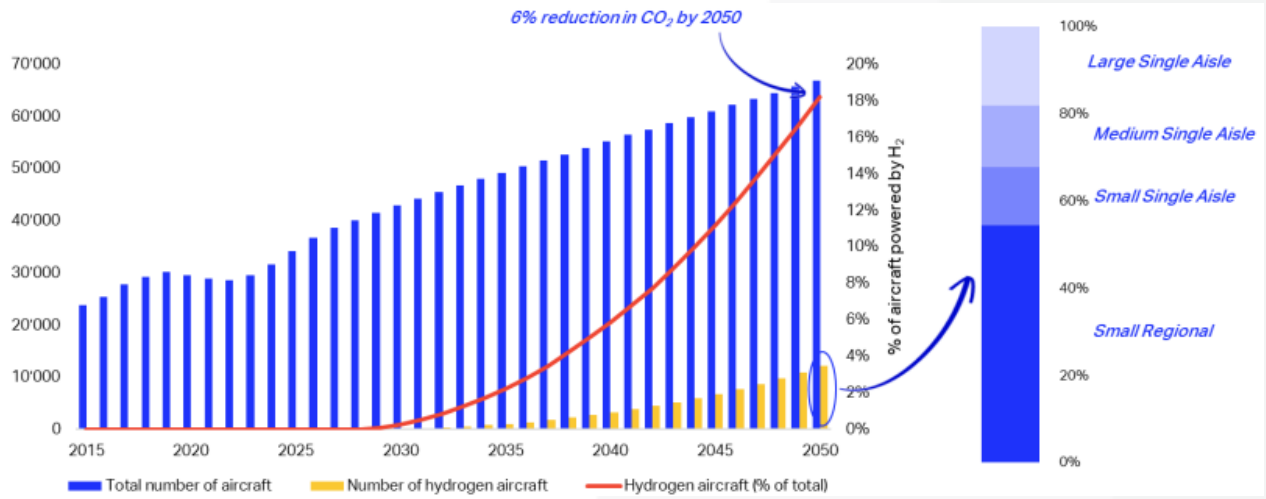
	Capacity[1]			Chargeable weight[1]			Rate[1]		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-0%	-2%		+0%	+2%		-0%	+9%
Asia Pacific		-0%	+2%		+1%	+9%		+0%	+13%
C. & S. America		+3%	+5%		+0%	+5%		+4%	+6%
Europe		-2%	-1%		-1%	+3%		+5%	+4%
M. East & S. Asia		+2%	+1%		-6%	+3%		-4%	+47%
North America		-3%	+1%		-3%	+6%		+1%	-3%
Worldwide		**-1%**	**+0%**		**-1%**	**+6%**		**+1%**	**+12%**

Source: World ACD

Elsewhere, projects that hydrogen-powered aircraft could constitute **~18%** of the global fleet by 2050, predominantly comprising small regional aircraft with **30–69 seats**.[16] This shift is anticipated to reduce global aviation CO_2 emissions by approximately **↓6%**, with a **↓53%** reduction within the regional fleet segment.

[16] IATA. 22/11/2024. Chart of the week: Evolution of hydrogen aircraft fleet to 2050.

Figure 17 – Projected number of aircraft in service by type



Source: IATA

Alternative strategies, such as introducing mid-sized or wide-body hydrogen aircraft, may offer greater emissions reductions but face challenges, including the need for significant airport infrastructure modifications.

ENDS[17]

[17]**ACKNOWLEDGEMENT:**

*This initiative – **The Cargo Movement Update** – was developed collectively by the Private Sector at large to provide visibility of the movement of goods during the COVID-19 pandemic. The report is authored by the Southern African Association of Freight Forwards (SAAFF) and distributed by Business Unity South Africa (BUSA). SAAFF acknowledges the input of several key business partners in compiling these reports, which have become a weekly industry staple. This edition is proudly sponsored by Turners Shipping.*

FERI CERTIFICATES FOR IMPORTED AND TRANSITED GOODS TO OR THROUGH THE DRC

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Procedure

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1
Submit the required documents by email or online.

2
Complete the application form and provide supporting documentation.

3
You will receive an invoice with attached draft, typically within 24 hours of all documents/ information received.

4
When payment reflects, the draft approved and a copy of the final bill of lading received; the validation will be requested.

5
To avoid fines, the FERI must be validated before the vessel arrives at the destination.

Introduction

The FERI Certificate is an essential requirement for all cargo entering the Democratic Republic of Congo (DRC). It is designed to streamline customs processes and ensure compliance with the DRC's import regulations.

Turners Shipping plays a pivotal role in facilitating smoother trade flows and enhancing the efficiency of cargo movement into one of Africa's most significant economies.

The FERI Certificate is an electronic document required to clear imported and transited goods to or through the DRC.

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