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Cargo Movement Update #236[1]

Date: 1 June 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)	39 286	44 757	**84 043**	33 578	38 255	**71 833**	↑17%
Air Cargo (tons)	4 165	2 730	**6 895**	4 021	2 704	**6 726**	↑3%

Monthly Snapshot

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

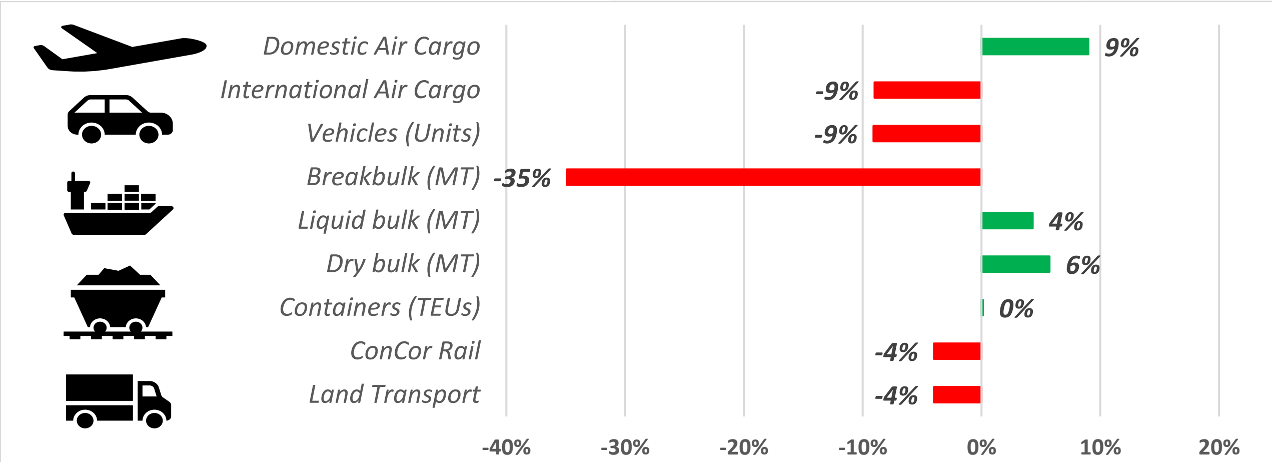
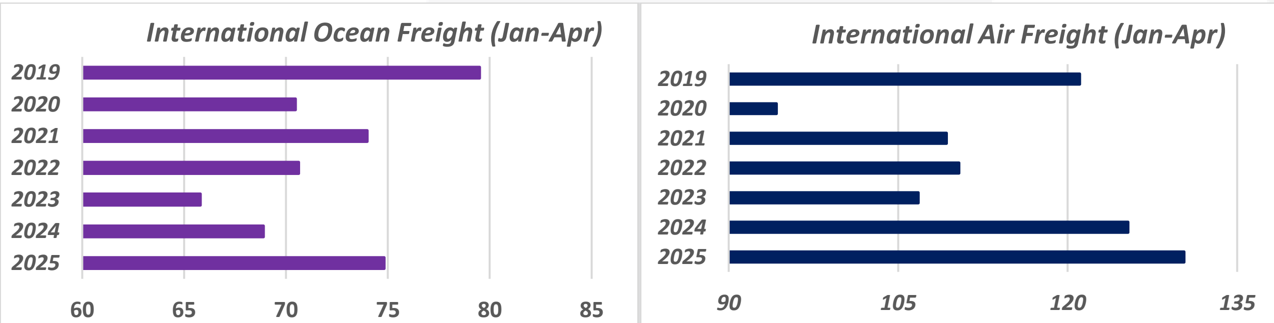


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~12 006 TEUs** was handled per day, with **~12 275 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 384** containers, down by **↓1%** from last week.
- Cross-border queue: **↑0,5 hrs**; transit: **↑0,5 hrs**; SA borders: **10,3 hrs** (**↑3%**); SADC: **4,7 hrs** (**no change**).
- Global schedule reliability improved for the third consecutive month in April (**↑1,7%**), reaching **58,7%**.
- Global spot rates increased by a massive **↑10%** (**$232**) to **$2 508**, as SFCI records 2nd highest ever jump.
- Global air cargo remained stable (w/w) but rose **↑6%** (y/y), with average rates steady at **$2,40/kg**.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *236th* 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: Apr vs Apr.
[5] Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **12 006 TEUs** was handled daily, increasing from **10 262 TEUs** the previous week. Port Operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages. Unfavourable weather and vessel ranging ensured operational disruptions at the Port of Cape Town. In contrast, the main operational constraints in Durban proved to be continuous equipment breakdowns, adverse weather, and network challenges. Adverse weather and vacant berths mainly impacted operations at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay this week. The latest reports from Maersk suggest that the Santa Rita and the Maersk Cap Carmel are experiencing delays coming into Cape Town, while the Maersk Colombo 520E will advance to Coega and omit Cape Town. Furthermore, the latest reports from TFR suggest that operations on the line between Johannesburg and Durban have improved after the extensive cable theft experienced over the previous weekend. Diesel hauling is still taking place on the Central Corridor (around Pretoria), resulting in long transit times for Cargo being conveyed on the line.

Global maritime developments this week were marked by rising freight rates, mounting schedule pressure, and legal-policy uncertainty. Schedule reliability improved for the third straight month in April, with Maersk and Hapag-Lloyd leading performance. On the policy front, a US court overturned former President Trump's "reciprocal" tariffs, introducing uncertainty as a temporary easing of US-China tariffs spurred a surge in Trans-Pacific demand. Carriers reinstated suspended services and added capacity, but risks of congestion remain. Freight rates surged, as Drewry's WCI rose by more than **↑10%**, and the SCFI saw its sharpest weekly gain since 2023. However, growing capacity (**↑25%** expected in June) clouds the rate sustainability. Carrier profits declined, with Q1 operating margins averaging **18.1%**—the lowest in a year—despite higher rates. Evergreen led at **26,7%**, while ONE lagged at **5,2%**, as cost pressures outpaced revenue growth across the sector.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **594 970 kg** inbound (**↑4%**, w/w) and **390 053 kg** outbound (**↑1%**). The continued relatively high throughput means the current volumes are significantly up on last year's levels (**↑17%**, y/y), and above the comparative levels of pre-pandemic 2019 (**↑4%**). In IATA's latest *"Air Cargo Market Analysis"*, CTKs rose by **↑5,8%** year-on-year in April 2025, driven by strong growth in Latin America and Asia Pacific. Meanwhile, capacity expanded by **↑6,3%** and cargo load factors remained stable at **43,9%**. In the high-frequency metrics, air cargo tonnages held steady week-on-week but climbed by **↑6%** compared to the same period last year, driven by strong Asia Pacific demand. Rates remained broadly stable, with key lanes like China–USA and China–Europe showing signs of recovery and growth.

Cargo movements along the N4 corridor increased for road and were stable for rail, with truck volumes through the border post at **1 517 HGVs per day** (**↑6%**, w/w). There was a slightly increased average of **3,6 hours**' (**↑16%**) worth of queuing time at the border, as the average processing time also increased – to around the same time of **3,4 hours** (**↑10%**) per crossing. The rail to Maputo increased to an average of **eight trains daily** (up by **one**). Sugar trains from Eswatini were stable at around **two trains a day**.

Crossing times increased slightly at several borders this week but remained relatively stable throughout the SADC region. Overall, the average queue time decreased by around **half an hour** from last week, while transit time decreased by around the same magnitude, **half an hour**. The median border crossing times at South African borders increased by **20 minutes**, averaging **~10,3 hrs** (**↑3%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**). On average, four SADC borders took around a day to cross last week, namely the usual suspects of Beitbridge, Chirundu OSBP, Groblersbrug, and Kasumbalesa (the worst affected, with an average of more than **two days** from **the Zambian sides**). Other developments include **(1)** an update on the Groblersbrug border post, and **(2)** challenges at Chirundu.

As South Africa navigates the path toward a more efficient and competitive logistics system, recent progress under the NLCC and the publication of the Freight Logistics Roadmap provide a credible blueprint for reform. Building on this momentum, launching the **Logistics Accountability Score** (LAS) last week represents a pivotal next step, introducing a data-driven mechanism to enhance transparency, performance, and voluntary compliance across the sector.[6] As stakeholders, we must now align around these tools, not only to fix what's broken, but to unlock long-term growth. With Q1 GDP growth at a subdued **↑0,1%**, the message is clear: South Africa cannot afford inertia. We must get on with growth and development in logistics, starting with the systems, standards, and shared accountability that will move our economy forward.

[6] Jardim, S. 30/05/2025. Industry partners launch Logistics Accountability Score.

Contents

1. Ports Update

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

a. Container flow overview

The following tables indicate the container flows reported for the last seven days. The reporting aligns with TPT's cycle, which runs from Monday to Sunday.

Table 2 – Container Ports – Weekly flow reported for 26 May to 1 June (measured in TEUs)

7-day flow reported (26/05/2025 – 01/06/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 489	31 421	↓10%
New Pier (Pier 1)	2 204	15 425	↑79%
Cape Town Container Terminal	1 795	12 566	↑34%
Ngqura Container Terminal	2 262	15 837	↑47%
Port Elizabeth Container Terminal	426	2 982	↓9%
Other	830	5 812	↑22%
Total	**12 006**	**84 043**	↑17%

Source: Calculated from TPT, 2025. Updated 01/06/2025.

An increased average of **~12 006 TEUs** (↑17%) was handled per day for the last week (*26 May to 1 June, Table 2*), slightly below the projected average of **~12 275 TEUs** (↓2% actual versus projected).

For the coming week, a slightly increased average of **~12 275 TEUs** (↑2%) is predicted to be handled (*2 to 8 June, Table 3*). This week, port operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages.

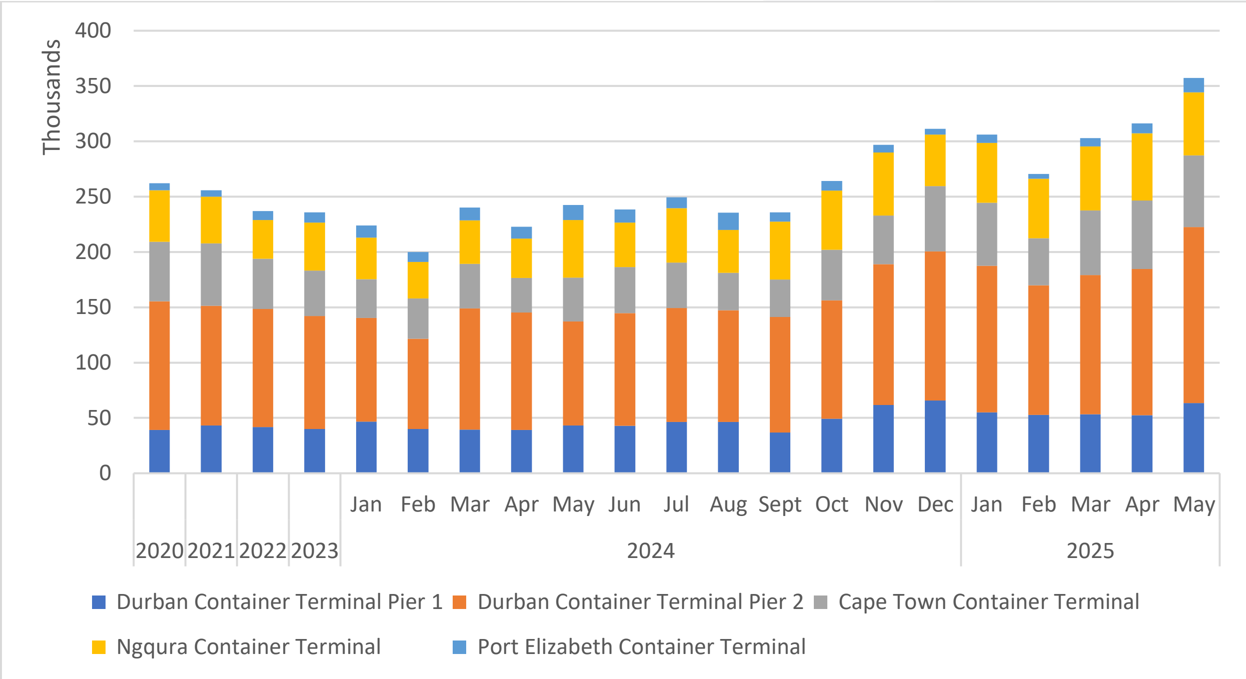
Table 3 – Container Ports – Weekly flow projected for 2 to 8 June (measured in TEUs)

7-day flow projected (02/06/2025 – 08/06/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 208	36 459	↑16%
New Pier (Pier 1)	1 996	13 975	↓9%
Cape Town Container Terminal	1 698	11 887	↓5%
Ngqura Container Terminal	2 064	14 447	↓9%
Port Elizabeth Container Terminal	444	3 110	↑4%
Other	864	6 047	↑4%
Total	**12 275**	**85 925**	↑2%

Source: Calculated from TPT, 2025. Updated 01/06/2025.

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.

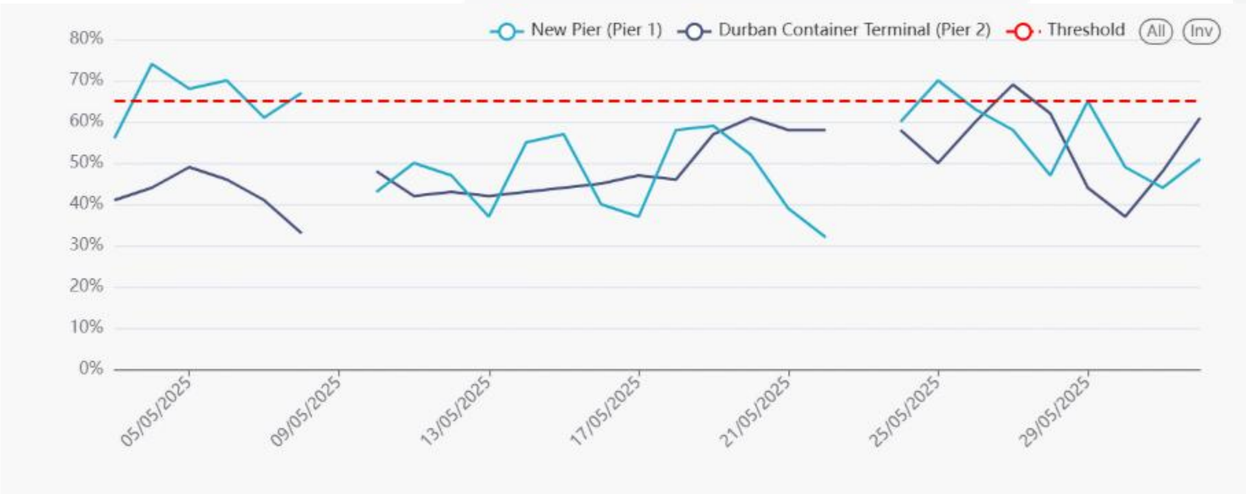
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 01/06/2025.

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

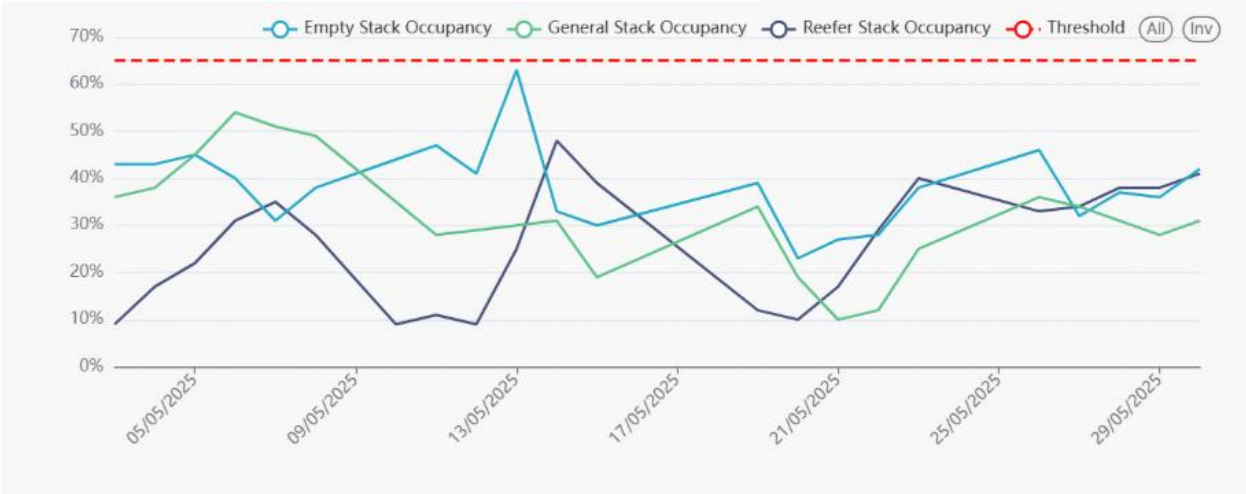
Figure 4 – Stack occupancy in DCT, general-purpose containers (5 May to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 01/06/2025.

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 (5 May to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 01/06/2025.

b. Summary of port operations

i. Weather and other delays

- Adverse weather and vessel ranging ensured operational disruptions at the Port of Cape Town.
- The main operational constraints in Durban proved to be continuous equipment breakdowns, adverse weather, and network challenges.
- Adverse weather and vacant berths mainly impacted our Eastern Cape Ports operations.
- Minimal delays were reported at the Port of Richards Bay this week.

ii. Cape Town

On Thursday, CTCT recorded two vessels at berth and one at anchor, as adverse weather proved to be the primary operational constraint. On the landside, between Monday and Thursday, the terminal managed to service at least 2 990 trucks while handling approximately 88 rail units. On the waterside, the terminal executed approximately 5 159 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 28%**, **reefers at 38%**, and **empties at 36%**. Additionally, the terminal operated with **six STS cranes**, **19 RTGs**, and **57 hauliers** towards the end of the week. During this period, Cranes LC1, LC7, and LC9 were out of commission, and no ETR has been communicated yet.

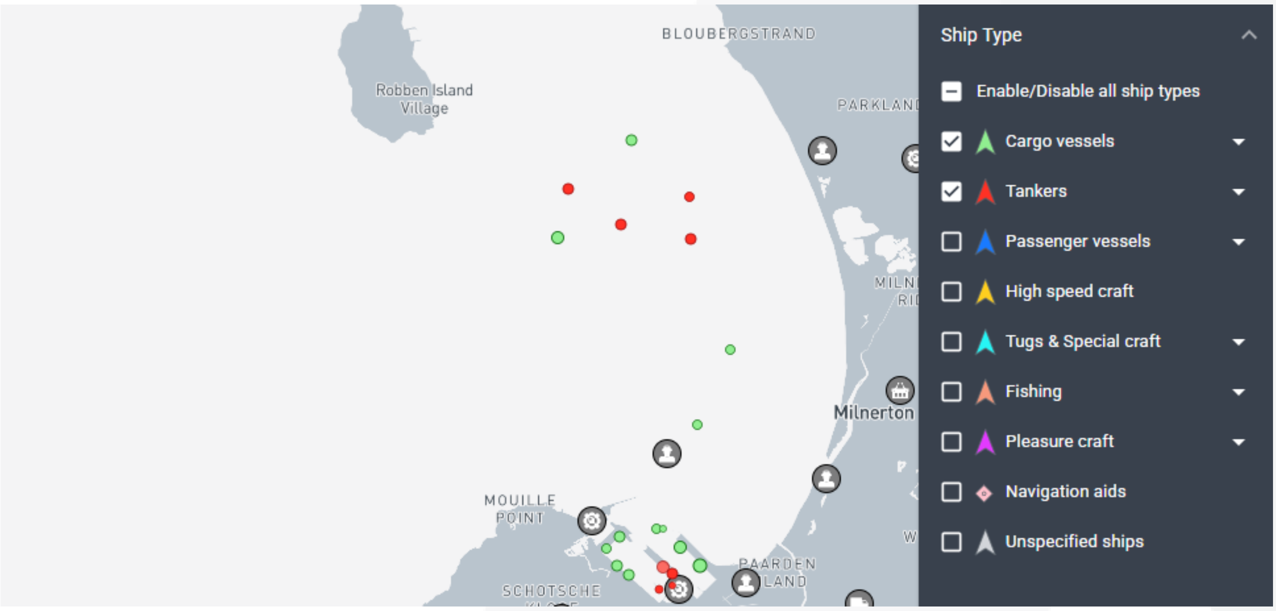
On Thursday, CTMPT recorded one vessel at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 180 container moves on the waterside. On the landside, 107 trucks were processed during the same period. Stack occupancy was recorded at 11% for general cargo, 26% for reefers, and 9% for empties. Towards the end of the week, the terminal operated with three cranes and four straddle carriers. Vessel ranging proved to be the primary operational constraint at the terminal.

The latest reports from Maersk suggest that the Santa Rita's journey to the Port of Cape Town is being delayed by the high swells expected in Cape Town over the coming days. The vessel is scheduled to arrive in Cape Town on 01 June, subject to the weather conditions.

The Maersk Cap Carmel 422W is experiencing heavy delays into Cape Town due to adverse weather conditions. Due to this delay, all Cape Town exports will be transferred from the Maersk Cap Carmel 422W to the CMA CGM Aqaba 423W. The CMA CGM Aqaba is due to berth in Cape Town on 2 June.

Between 19 and 25 May, the FPT terminal handled eight vessels: five multi-cargo and three dry bulk vessels. Berth occupancy during this period was recorded at 79%. The terminal planned to handle seven more vessels between 26 May and 1 June, with another five vessels scheduled between 2 and 8 June. Inclement weather and the late arrival of cargo and transporters accounted for the most significant operational constraints during this period.

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



Source: Marine Traffic. Updated 02/06/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, with zero vessels at anchor. Stack occupancy was **47%** for **GP containers** and **65%** for **reefers**. Between Monday and Thursday, the terminal executed at least 3 735 gate moves and 232 rail moves on the landside. The **average TTT** for the week was **~59 minutes** (**↓12%**, w/w) and an average **staging time** of **~30 minutes** (**↓3%**). Additionally, the terminal moved over 4 450 TEUs across the quay on the waterside during the same period. The terminal had **four STS cranes** and **19 RTGs** available towards the end of the week.

Pier 2 had three vessels on berth and two at anchorage on Thursday, as equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **44%** for **GP containers** and **38%** for **reefers**. The terminal operated with **nine gangs** and moved over 14 000 containers across the quay between Monday and Thursday on the waterside. Approximately 9 464 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~57 minutes** (**↓29%**, w/w) and a staging time of **~45 minutes** (**↓42%**). Approximately 867 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **71** and **77** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **84%** during this period. For the most significant part of the week, the terminal merely had three working vessels on the berth due to components for the second batch of cranes being offloaded at berth 108.

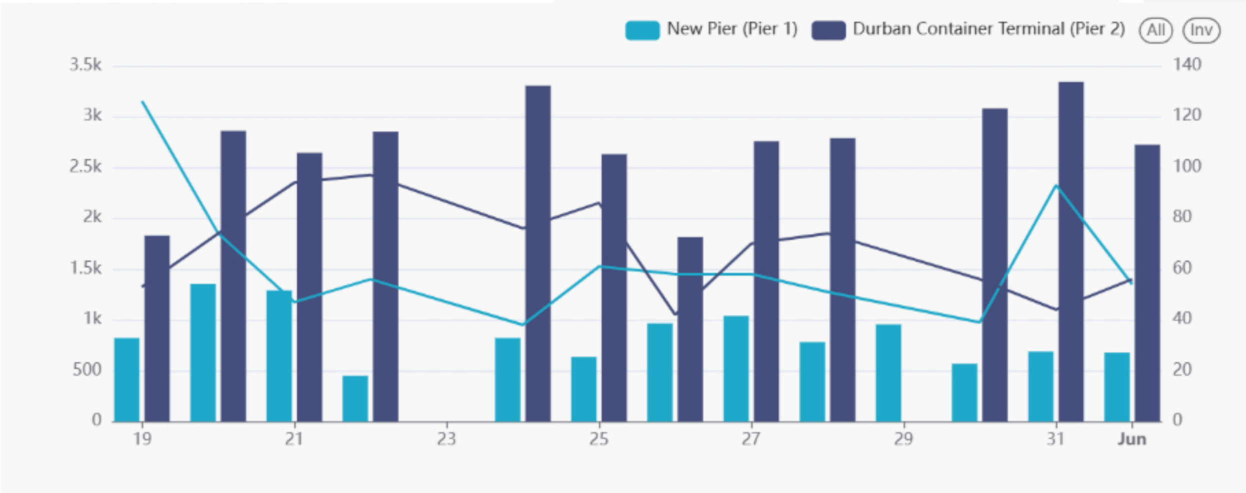
Durban's MPT terminal recorded one vessel at berth on Thursday and none at outer anchorage. Stack occupancy for containers was recorded at 26%, the reefer stack at 22%, and the breakbulk stack at 2%. In the preceding 24 hours, 118 containers were handled on the waterside. On the landside, 396 container trucks were serviced at a TTT of ~45 minutes. During this period, two cranes, nine reach stackers, seven forklifts, and 22 ERFs were in operation. The third crane went out of commission once more towards the end of the week to fit gaskets.

The Maydon Wharf MPT recorded zero vessels at berth or anchorage between Wednesday and Thursday. On the waterside, no volumes were handled, while 79 trucks, containing approximately 2 924 tons, were serviced on the landside. The agri-bulk facility recorded zero vessels at berth or anchor during the same period. The next vessel destined for the terminal is expected to arrive on 7 June. On the waterside, the terminal managed to handle 15 trucks, containing approximately 518 tons.

On Thursday, the Ro-Ro terminal in Durban recorded three vessels on the berth, with none at anchorage. In the preceding 24 hours, the terminal handled 2 034 road- and 68 rail units on the landside while also handling 3 614 units on the waterside. Overall stack occupancy was 81%, 80% at Q&R, and 50% at G-berth. During this period, the terminal had 114 high-and-heavy (abnormal loads) on hand and managed to handle 12.

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.

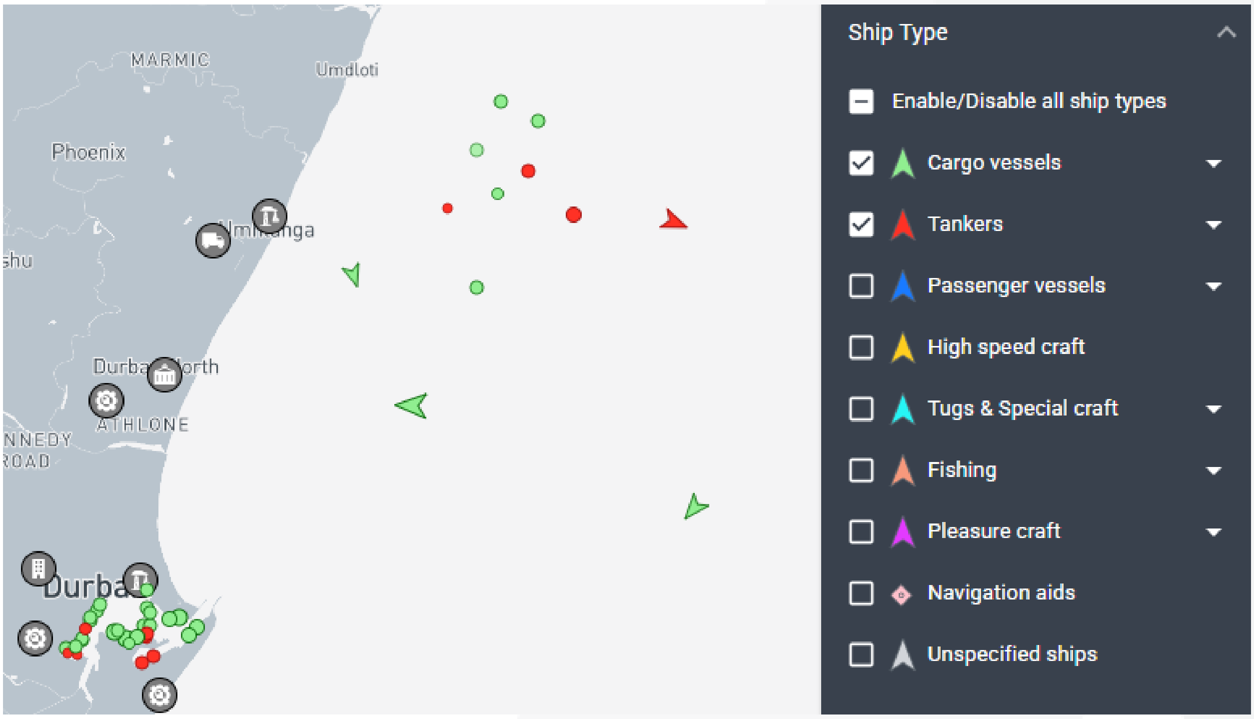
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 01/06/2025.

The queue of container vessels waiting outside Durban has stayed steady from last week. On Monday evening (2 June), **zero** container vessel was waiting outside at anchorage for Pier 1, **two** for Pier 2, and **one** for Point 2. The queue of dry (**four**), liquid (**two**), and breakbulk (**three**) vessels has increased slightly from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 02/06/2025 at 14:00.

iv. Richards Bay

On Monday (2 June), the Port of Richards Bay had 13 vessels at anchor and 12 on the berth, translating to four vessels at DBT, two at MPT, five at RBCT, and another at the liquid bulk terminal. At the start of the week, two tugs, one pilot boat, and one helicopter operated for marine resources. The daily average for the week increased to around **194 450 tons** (**↑11%**, w/w). An average of **21 trains** (up by five from last week) were serviced on the landside, slightly below the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded two vessels 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 27% for reefers, 26% for reefer ground slots, and 41% for the general stack. Despite having a vacant berth for around five hours and being windbound for four hours, the terminal handled approximately 2 370 TEUs and 234 reefers on the waterside. Approximately 405 trucks were processed on the landside at a TTT of ~26 minutes. Towards the end of the week, the terminal had seven STS cranes, 27 RTGs, and 75 hauliers in service.

Union engagements took place across all shifts at NCT between Tuesday and Wednesday to provide employees with feedback around the wage negotiations. These engagements took place between 08:00-09:00, 14:00-15:00, and 22:00-23:00, resulting in operational delays at the terminal.

The latest reports from Maersk suggest that the Maersk Colombo has faced significant delays in Apapa, Nigeria, resulting in delays in South Africa. Thus, the Maersk Colombo 520E will advance to Coega and omit Cape Town. All export bookings will be transferred to the Maersk Cubango 521E to accommodate this adjustment. At the same time, all import containers scheduled initially for discharge in Cape Town will be rerouted accordingly for onward transport to their respective destinations.

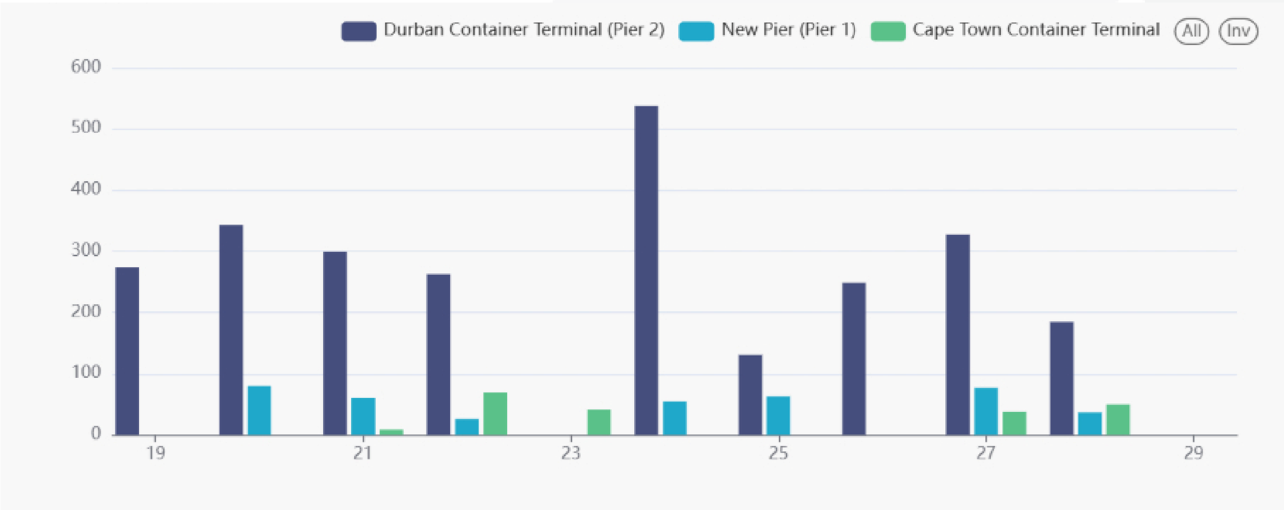
On Wednesday, GCT had one vessel at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 257 trucks were processed at a TTT of ~44 minutes on the landside, while 715 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 28% for the general stack, 23% for reefers, and 28% for reefer ground slots.

On Tuesday, the Ro-Ro terminal had zero vessels on berth and none at outer anchorage. The terminal handled 16 units during this period, resulting in a stack occupancy figure of 31%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that operations on the line between Johannesburg and Durban have improved after the extensive cable theft experienced over the previous weekend. However, the latest reports indicate intermittent cable theft still occurs on the line. Diesel hauling is still taking place on the Central Corridor (around Pretoria), resulting in long transit times for Cargo being conveyed on the line. Additionally, towards the end of the week, DCT Pier 2 had 445 ConCor units on hand with a dwell time of 148 hours and 348 over-border units with a dwell time of 109 days.

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



Source: Calculated using data from Transnet, 2024. Updated 01/06/2025.

In the last week (*26 May to 1 June*), rail cargo on the ConCor line out of Durban was reported at **2 384** containers, down ↓**1%** from the previous week's **2 415** containers.

vii. Merchant Shipping Bill (B21-2023)

The Portfolio Committee on Transport convened public hearings on Tuesday, 3 June 2025, to receive oral submissions on the proposed Merchant Shipping Bill [B 12 – 2023]. The hearings, held virtually, featured inputs from Agbiz, Exporters Western Cape, the Southern African Association of Freight Forwarders (SAAFF), and Mr M Meyiwa. The Bill has drawn significant national[7] and international[8] attention due to its far-reaching implications for South Africa's maritime and logistics sectors. In its submission, SAAFF acknowledged the

[7] Mohaya, J. 02/06/2025. SA moves towards creating a national shipping carrier.
[8] Chambers, S. 02/06/2025. South Africa takes another step on path to creating a national shipping line.

importance of ensuring environmental and safety compliance in shipping but expressed strong concerns about the feasibility and economic rationale of key elements of the Bill.

A central issue raised was the misplaced emphasis on developing a national carrier without sufficient underlying trade volumes or demand to support such an initiative. In an already constrained fiscal environment, the risk of diverting limited resources to establish an unviable state-led shipping line is particularly troubling. Instead, South Africa should prioritise the urgent restructuring and modernisation of its maritime logistics network – enhancing port efficiency, improving turnaround times, and restoring investor and customer confidence in our freight system. Without addressing these foundational inefficiencies, any attempt to overlay a national shipping carrier would be premature and counterproductive.

We therefore maintain that, while well-intentioned, the Bill in its current form poses substantial risks to the competitiveness of South Africa's trade ecosystem and must be reconsidered. Importantly, the Bill must also be referred to Nedlac for proper social partner engagement, in line with South Africa's legislative and consultative obligations.

We maintain that, while well-intentioned, the Bill in its current form poses substantial risks to the competitiveness of South Africa's trade ecosystem and must be reconsidered.

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 19 May. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *May 2024* averaged **~838 541 kg** daily.

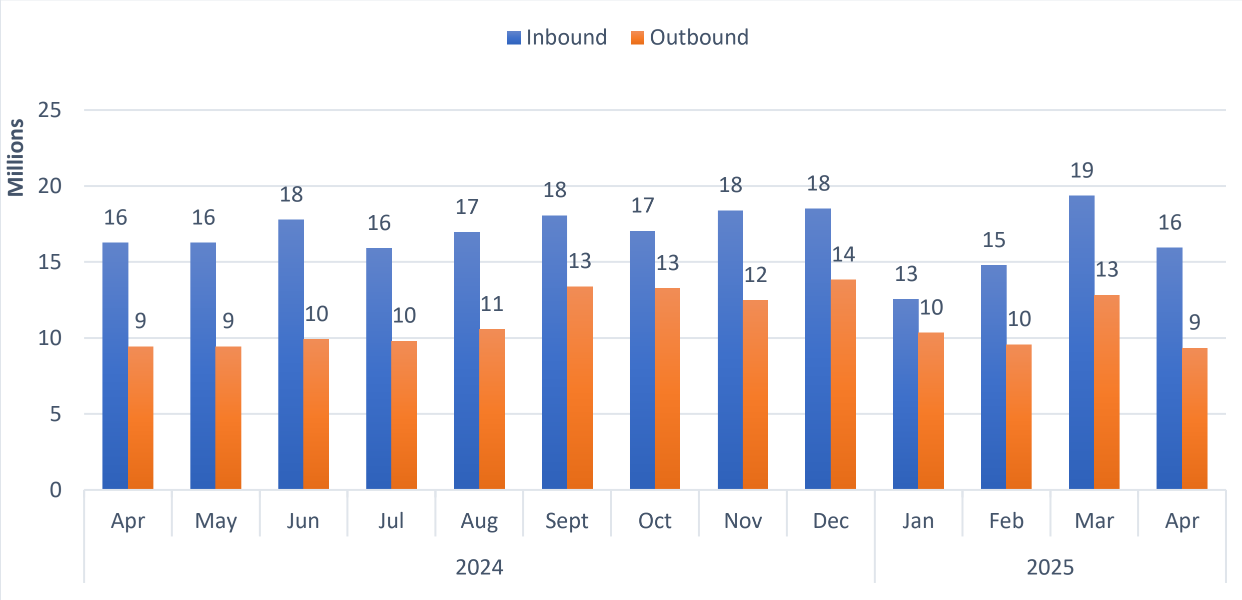
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	19-May	20-May	21-May	22-May	23-May	24-May	25-May	Week
Volume inbound	459 752	232 373	382 744	391 734	264 907	530 682	1 902 596	**4 164 788**
Volume outbound	141 188	225 855	223 924	245 710	227 238	190 230	1 476 229	**2 730 374**
Total	**600 940**	**458 228**	**606 668**	**637 444**	**492 145**	**720 912**	**3 378 825**	**6 895 162**

Courtesy of ACOC. Updated: 01/06/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **594 970 kg** inbound (**↑4%**, w/w) and **390 053 kg** outbound (**↑1%**). The continued relatively high throughput means the current volumes are significantly up on last year's levels (**↑17%**, y/y), and above the comparative levels of pre-pandemic 2019 (**↑4%**). The following figure shows the international air cargo flows to and from OR Tambo since the start of last year:

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

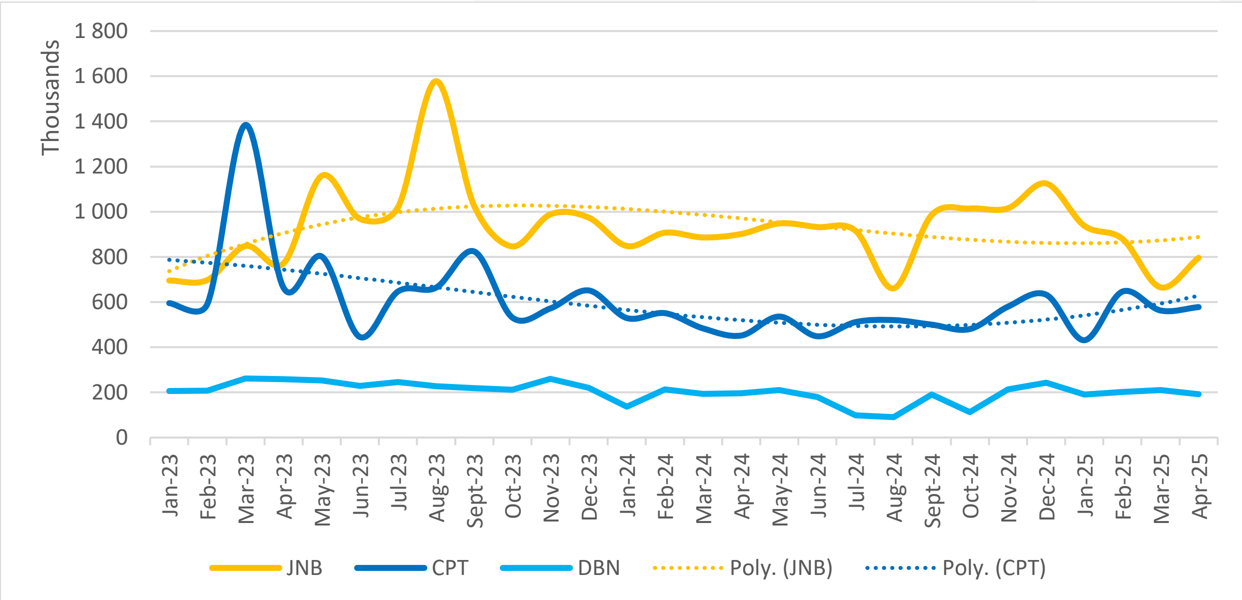


Calculated from ACOC. Updated: 01/06/2025.

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: 01/06/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*26 May to 1 June*), cargo movements along the N4 corridor increased for road and were stable for rail. The following notes summarise the recent developments:

- Truck volumes eastbound through the Lebombo border post at **1 517 HGVs per day** (**↑6%**, w/w).
- There was a slightly increased average of **3,6 hours**' (**↑16%**) worth of queuing time at the border, as the average processing time also increased – to around the same time of **3,4 hours** (**↑10%**) per crossing.
- The rail to Maputo increased to an average of **eight trains daily** (up by **one**).
- Sugar trains from Eswatini were stable at around **two trains a day**.

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

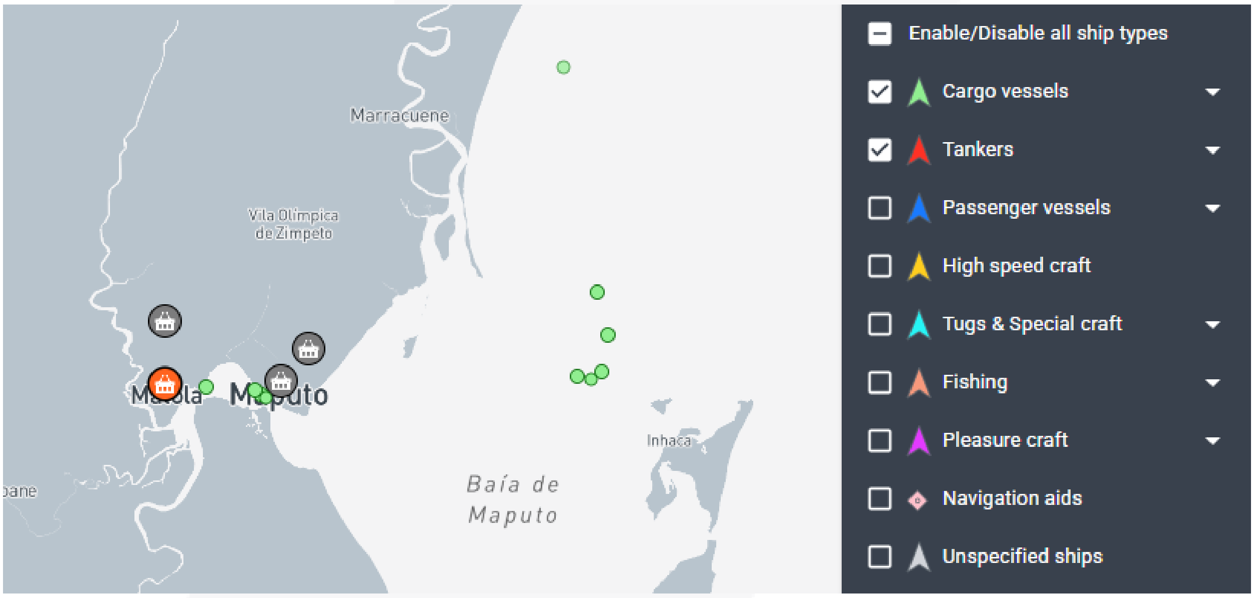
Table 5 – Lebombo border post update

Date 06h00 Daily	Total Trucks Entering KM4	Total Trucks Exit KM4	Mineral Trucks	General Cargo (incl. critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Total Trucks inside KM4 staging	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo
Design Capacity	**1 500**	**1 500**	**1 200**	**200**	n/a	**50**	**50**	**2 000**	**20**	**10**	**6**	**4**
26-May-25	1 243	1 348	1 078	141	18	103	8	264	**10**	9	*	1
27-May-25	1 557	1 392	1 058	212	35	84	3	250	**9**	7	*	2
28-May-25	1 550	1 502	1 065	313	50	75	42	296	**9**	7	*	2
29-May-25	1 562	1 537	1 059	273	54	95	56	306	**0**	*	*	*
30-May-25	1 552	1 537	1 059	273	54	95	56	306	**0**	*	*	*
31-May-25	1 512	1 565	1 117	316	40	57	35	270	**0**	*	*	*
01-Jun-25	1 642	1 626	1 214	226	39	54	50	258	**1**	*	1	*
% of design capacity	**101%**	**100%**	**91%**	**125%**	**n/a**	**161%**	**71%**	**14%**	**21%**	**77%**	**17%**	**42%**
% change (d/d)	9%	4%	9%	-28%	-3%	-5%	43%	-4%	**n/a**	**n/a**	**n/a**	**n/a**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 01/06/2025.
** = 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 02/06/2025 at 14:00.

b. SADC cross-border and road freight delays

Monthly cross-border road figures for April at crucial border posts show the following changes, which are measured in the number of heavy goods vehicles (HGVs) crossing the respective border posts:

Table 6 – April cross-border road freight movements – South African borders (HGVs)

Border Post	Northbound	(%, m/m)	Southbound	(%, m/m)	Total	(%, m/m)
Beitbridge	12 921	31%	12 213	-4%	**25 134**	**11%**
Skilpadshek	7 455	-20%	1 576	-53%	**9 031**	**-29%**
Ramatlhabama	4 893	-25%	2 393	-23%	**7 286**	**-24%**
Kopfontein	5 916	-25%	642	-83%	**6 558**	**-44%**

Source: TLC, FESARTA, & Crickmay

The following challenges and delays are affecting roads in South Africa and the broader SADC region:

- Overall, the average queue time decreased by around **half an hour** from last week, while transit time decreased by around the same magnitude, around **half an hour**.
- The median border crossing times at South African borders increased by **20 minutes**, averaging **~10,3 hrs** (**↑3%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**).

1. **Groblersbrug Border Post (South Africa–Botswana):**
    a. **Extended delays for tankers:** Tankers are experiencing wait times exceeding 48 hours at Groblersbrug. Transporters have expressed frustration, noting that the Risk Management System has not effectively mitigated the queuing issues.
    b. **Yard processing efficiency**: Despite the delays in entering the border post, processing within the yard is smooth and efficient.
    c. **Prioritisation measures**: Officials have prioritised tankers and refrigerated trucks to manage the congestion effectively.
    d. **Comparative advantage**: Despite current challenges, stakeholders still consider Groblersbrug more efficient and cost-effective than Beitbridge.
2. **Chirundu One-Stop Border Post (Zimbabwe–Zambia):**
    a. **Scanner downtime**: On May 21st, scanner malfunctions led to significant slowdowns in cargo processing.
    b. **ASYCUDA system issues**: The Automated System for Customs Data (ASYCUDA) experienced disruptions, further complicating cargo clearance processes.
    c. **Systemic challenges**: Studies have highlighted persistent issues at Chirundu, including inadequate hardware and software, lack of staff training, and inconsistent internet connectivity. These factors contribute to prolonged clearance times, sometimes exceeding 72 hours.
    d. **Operational hours and staffing**: Limited operational hours and insufficient staffing levels have been identified as negatively impacting border clearance efficiency.

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

Table 7 – Delays[9] summary – South African borders (both directions)

Border Post	Direction	HGV[10] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	524	23,7	6,4	23,4	15 720	3 668
Beitbridge	Zimbabwe-SA	460	9,9	2,3	9,5	13 800	3 220
Groblersbrug	SA-Botswana	241	24,9	1,3	25,0	7 230	1 687
Martin's Drift	Botswana-SA	205	2,1	0,3	2,0	6 150	1 435
Kopfontein	SA-Botswana	231	6,1	1,2	6,1	6 930	1 617
Tlokweng	Botswana-SA	23	0,6	0,2	0,3	690	161
Vioolsdrift	SA-Namibia	30	4,1	1,3	4,1	900	210
Noordoewer	Namibia-SA	20	2,3	0,4	2,2	600	140
Nakop	SA-Namibia	30	4,9	0,3	4,6	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,4	1,1	600	140
Skilpadshek	SA-Botswana	256	5,5	1,5	5,3	7 680	1 792
Pioneer Gate	Botswana-SA	55	0,0	0,0	0,0	1 650	385
Lebombo	SA-Mozambique	1 430	3,6	0,5	3,4	42 900	10 010
Ressano Garcia	Mozambique-SA	1 297	2,1	0,2	2,0	38 910	9 079
Sum/Average		**4 822**	**6,5**	**1,2**	**6,4**	**144 660**	**33 754**

Source: TLC, FESARTA, & Crickmay, week ending 25/05/2025.

Table 8 – Delays summary – Corridor perspective

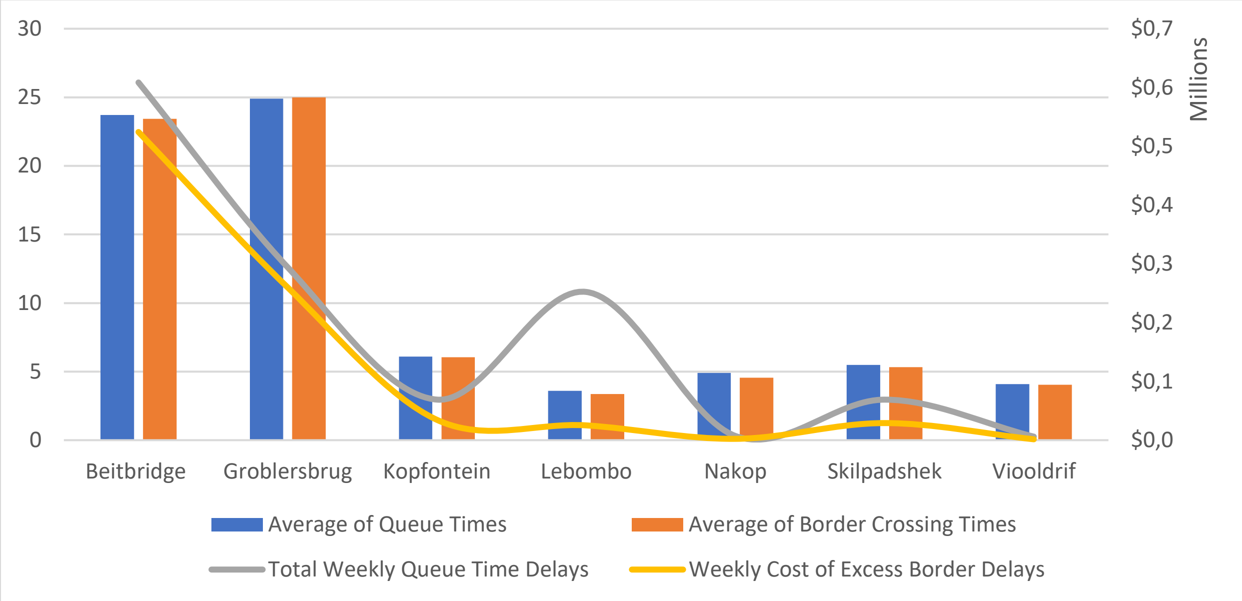
Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	12,1	3,8	11,4	9 600	2 240
Central Corridor	798	0,4	0,0	0,4	23 940	5 586
Dar Es Salaam Corridor	1 819	13,2	1,0	13,1	54 570	12 733
Maputo Corridor	2 727	2,9	0,4	2,7	81 810	19 089
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 756	10,3	1,4	10,2	112 680	26 292
Northern Corridor	2 817	1,1	0,1	1,0	92 520	21 588
Trans Caprivi Corridor	341	2,4	0,6	2,3	10 230	2 387
Trans Cunene Corridor	100	3,1	0,6	3,0	3 000	700
Trans Kalahari Corridor	116	17,1	2,3	16,8	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	**13 021**	**5,5**	**0,7**	**5,3**	**398 640**	**93 016**

Source: TLC, FESARTA, & Crickmay, week ending 25/05/2025.

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

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

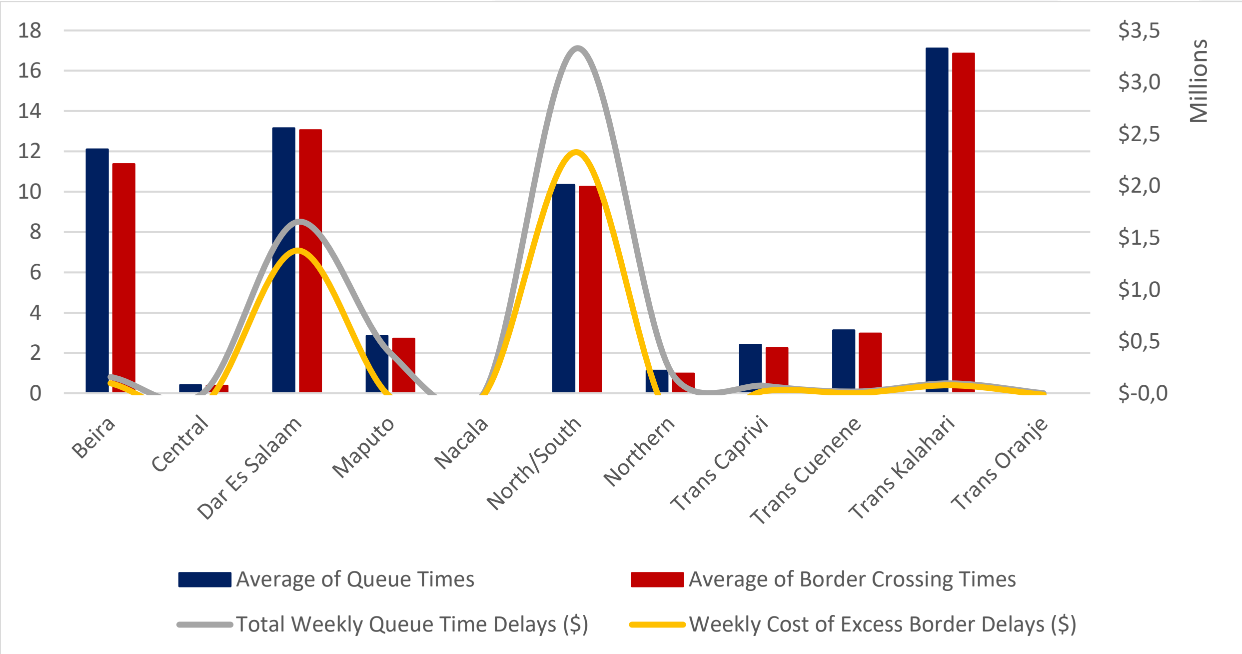
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 25/05/2025.

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 25/05/2025.

In summary, cross-border queue time averaged **~5,5 hours** (up by **~0,5 hours** from the previous week's **~4,9 hours**), indirectly costing the transport industry an estimated **$5,9 million** (**R106 million**). Furthermore, the week's average cross-border transit times also hovered around **5,3 hours** (up by **~0,5 hours** from the **~5,3 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,5 million** (**R62 million**). As a result, the total indirect cost for the week amounts to an estimated **~$9,4 million** (**R168 million**, up by **~R11 million** or **↑6,4%** from **~R157 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.

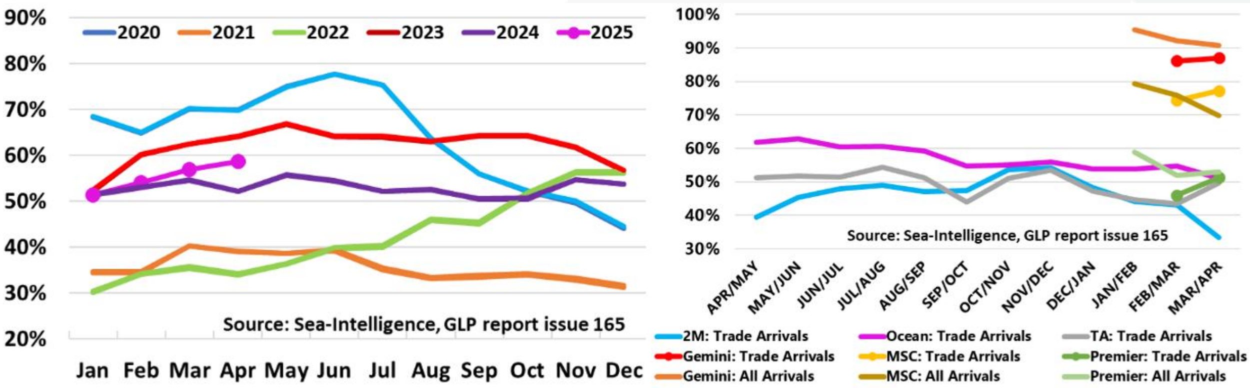
a. Global shipping industry

i. Global schedule reliability

According to *Sea-Intelligence's* Global Liner Performance (GLP) report, global schedule reliability improved for the third consecutive month in April, reaching **58,7%**—a **↑1,7%** increase from March.[11] On an annual basis, the April score was also up by **↑6,5%**, as Maersk was the most reliable top-13 carrier at **73,4%**, followed by Hapag-Lloyd at **72,3%** and MSC at **60,7%**.

In March/April, Gemini Cooperation recorded **90,7%** schedule reliability across all arrivals, and **87%** across TRADE arrivals[12], followed by MSC at **69,8%** for all arrivals and **77,3%** for TRADE arrivals, while Premier Alliance recorded **53%** for ALL arrivals and **51,3%** across TRADE Arrivals.

Figure 15 – Global Schedule Reliability (%) and Alliance East/West Schedule Reliability (days)



Source: Sea Intelligence

ii. Global shipping summary

A US Court of International Trade ruling overturned former President Trump's "reciprocal" tariffs, leading to confusion among importers about future tariff liabilities. The Trump administration's subsequent appeal has prolonged uncertainty, complicating supply chain planning ahead of the critical holiday season.[13] The temporary easing of US-China tariffs to **30%** has spurred a rush of imports, overwhelming Trans-Pacific shipping capacity. Carriers are reinstating suspended Trans-Pacific services and introducing extra loaders to meet surging demand[14], with potential congestion being feared.[15]

Drewry's "*Cancelled Sailings Tracker*" have increased slightly and is trading around an **8% cancellation rate** for pro-forma scheduling from 2 June to 6 July.[16] Global port congestion is starting to build up again; the current impact on the global fleet remains at **8%** (**2,57 million TEU**), below the peak of **11%** recorded earlier this year.[17]

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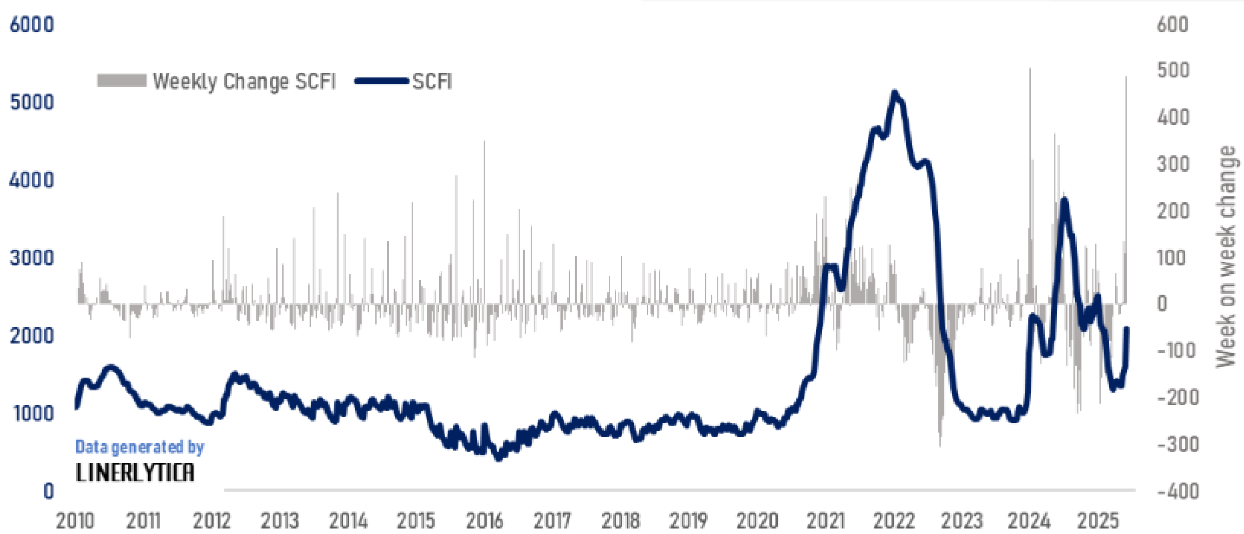
[11] Murphy, A. 30/05/025. Global schedule continues to increase in 2025.
[12] Sea-Intelligence revised its alliance schedule reliability methodology to account for the limited rollout of new alliances in early 2025. Whereas scores are typically based on destination arrivals, a temporary "all arrivals" metric—covering both origin and destination port calls—was introduced for comparability. Once services are fully deployed, the two measures are expected to align.
[13] Young, L. & Berger, P. 29/05/2025. Tariff Ruling Raises Uncertainty and Costs for U.S. Importers.
[14] Beontrade. 28/05/2025. Freight market update - 28 May 2025.
[15] Goldstone, C. 28/05/2025. Congestion fear as US west coast ports brace for transpacific cargo surge.
[16] Drewry. 30/05/2025. Cancelled Sailings Tracker.
[17] Linerlytica. 02/06/2025. Market Pulse – Week 22.

iii. Global freight rates and carrier profits

Trans-Pacific freight rates experienced their largest one-week increase on record, driven by the rollback of US tariffs under the so-called "TACO" effect, benefiting carriers significantly. This spike has also tightened the charter market due to scarce vessel availability. However, legal challenges to the tariffs and continued capacity increases, set to rise over **25%** in June, cloud the outlook. The SCFI composite index rose **487 points** on 30 May, just shy of its December 2023 peak. While further gains are likely as 1 June rate hikes take hold, uncertainty over demand sustainability and growing capacity make the market's trajectory unclear. The magnitude of last week's increase is duly illustrated:

Figure 16 – Shanghai Containerised Freight Index



Source: Linerlytica

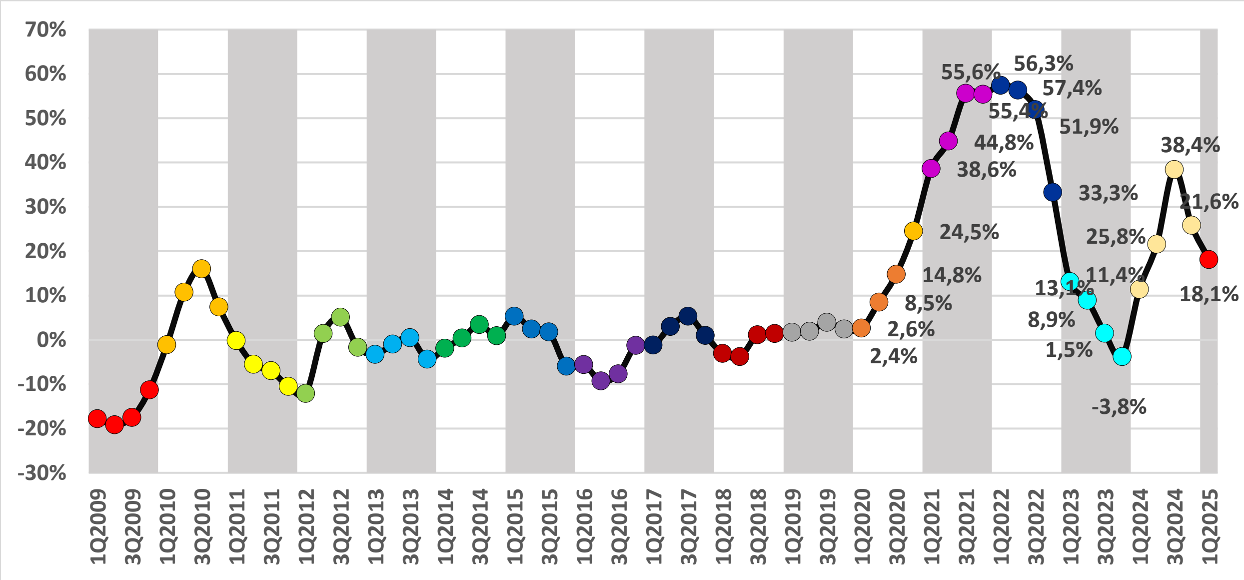
Meanwhile, Drewry's "*World Container Index*" – the index that we track weekly – increased by **↑10,2%** (or **$232**) to **$2 508 per 40-ft container**.[18] Charter rates also continued their ascent, as the transpacific demand spiked, as the *Harper Petersen Index* (Harpex) traded around **2 115 points** (**↑0,6%**) on Friday.[19]

Alphaliner this week reported on carrier profits for Q1, with the average operating margin for the nine largest container carriers dropping to **18,1%** - its lowest level in a year – down from **25,8%** in the previous quarter, as rising costs and softening demand offset higher freight rates.

Despite American cargo frontloading ahead of potential Chinese tariffs, profitability declined across the board. Evergreen Marine led the sector with a **26,7%** margin, reaffirming its consistent performance, while Ocean Network Express (ONE) fell to the bottom at **5,2%** due to surging costs and subdued post-Lunar New Year demand. Freight rates rose **10%** on average year-on-year, with ZIM, Evergreen, and COSCO recording double-digit increases. However, gains were insufficient to counterbalance escalating expenses, highlighting margin pressure despite elevated rate levels.

[18] Drewry. 29/05/2025. World Container Index.
[19] Harpex. 23/05/2025. Harper Petersen & Co Charter Rate Index.

Figure 17 – Main Carriers: Average Core EBIT margin per quarter (%, q/q)

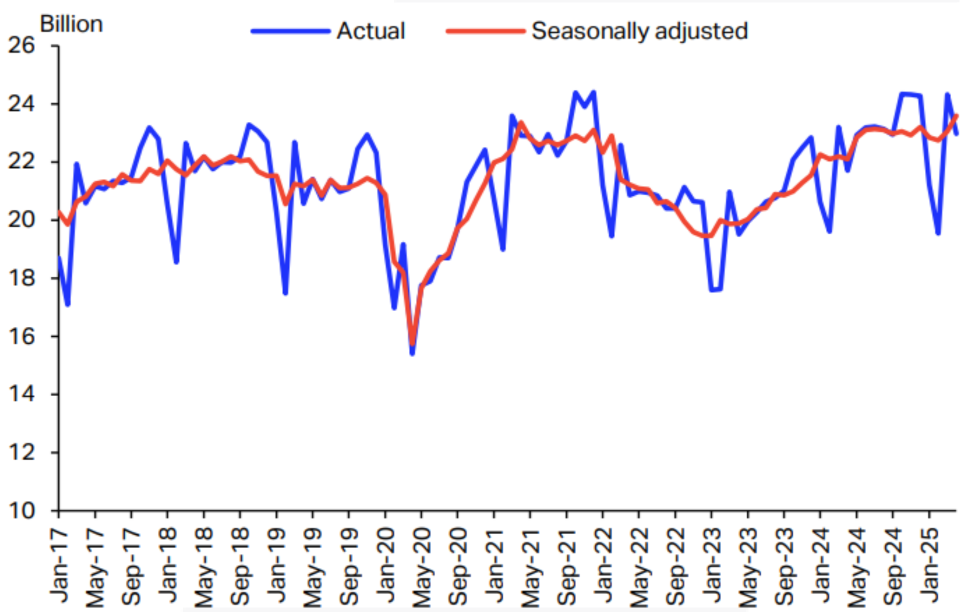


Source: Calculated from [Alphaliner]

b. Global air cargo industry

In April 2025, global air cargo demand, measured in cargo tonne-kilometres (CTK), increased by **↑5,8%** year-on-year, with seasonally adjusted growth of **↑2,3%** month-on-month. International CTK rose by **↑6,5%**, led by Latin America, the Caribbean (**↑13%**), and Asia Pacific (**↑10%**). Moreover, African airlines finally turned positive in April, with a growth rate of **↑4,8%** (y/y). Available cargo capacity (ACTK) expanded by **↑6,3%** year-on-year, resulting in a slight decline in the cargo load factor to **43,9%**. Jet fuel prices decreased by **↑21%** year-on-year, while cargo revenue rates increased by **↑1,7%** both annually and monthly. The growth was supported by seasonal demand for fashion and consumer goods and the front-loading of shipments ahead of US tariff changes effective 2 May.

Figure 18 – Industry CTKs (billions)



Source: [IATA]

In the high-frequency metrics from World ACD, global air cargo volumes remained stable week-on-week, with demand up ↑**6%** year-on-year and a ↑**7%** increase over the previous two-week period. Asia Pacific led the growth, particularly on the Asia Pacific–North America (↑**19%**) and North America–Asia Pacific (↑**13%**) lanes. Conversely, Central & South America–North America volumes dropped ↓**23%** post-Mother's Day. China–USA tonnages rebounded after sharp declines, now only ↓**5%** below 2024 levels. China–Europe traffic grew ↑**11%** year-on-year, despite a slight week-on-week dip.

Figure 19 – Regional changes in capacity, chargeable weight, and rates (weeks 2 to 5, % 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%	+3%		+1%	+0%		-0%	+7%
Asia Pacific		+6%	+4%		+13%	+8%		+1%	-3%
C. & S. America		-8%	-1%		-15%	+3%		-4%	-4%
Europe		+2%	+3%		+8%	+8%		-1%	-1%
M. East & S. Asia		+4%	+5%		+9%	+3%		-1%	-14%
North America		+1%	-1%		+2%	+1%		-0%	+0%
Worldwide		+2%	+2%		+7%	+6%		+1%	-3%

Source: World ACD

Overall, the market showed resilience amid geopolitical uncertainty and seasonal fluctuations. Rates remained broadly stable, averaging around **$2,40/kg**, with only marginal fluctuations across major lanes.

ENDS[20]

[20]**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.*