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Cargo Movement Update #227[1]

Date: 30 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)	34 635	39 458	**74 093**	37 782	43 045	**80 827**	↓8%
Air Cargo (tons)	3 792	2 633	**6 424**	4 095	2 747	**6 842**	↓6%

Monthly Snapshot

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

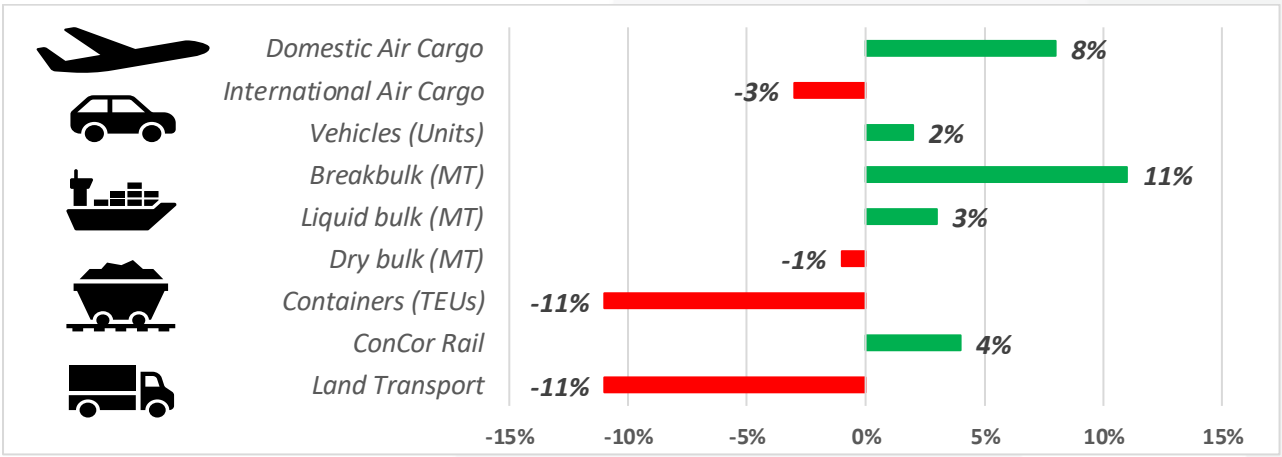
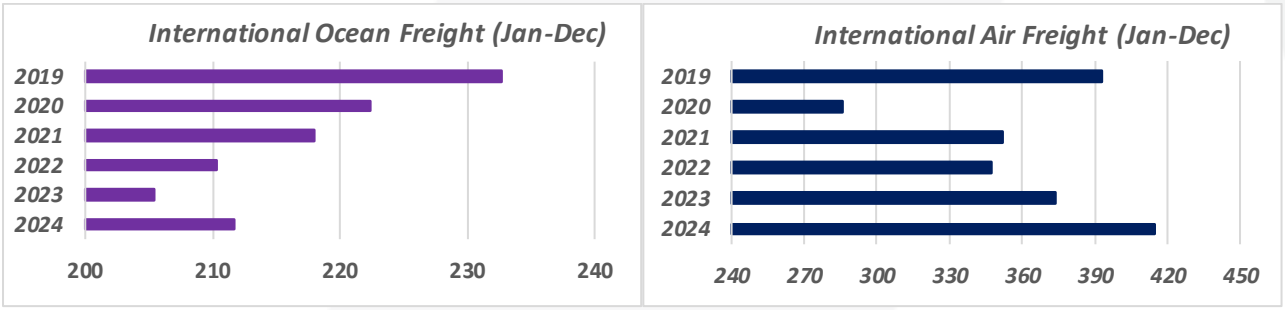


Figure 2 – Year-to-date flows 2019-2024[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~10 585 TEUs** was handled per day, with **~11 381 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 442** containers, down by ↓14% from last week.
- Truck volumes through Lebombo decreased to **1 466 HGVs/day** (↓**1%**), with average crossing times **2,5 hrs**.
- Cross-border queue: ↓**0,5 hrs**; transit: ↓**0,3 hrs**; SA borders: **10,4 hrs** (↓**6%**); SADC: **5,0 hrs** (↓**4%**).
- The world's 30 largest container ports collectively recorded a robust ↑**7%** (y/y) increase in throughput.
- Global spot rates declined again this week and are down by ↓**4,2%** (or **$96**) – trending at **$ 2 168/40'**.
- Global air tonnages are down ↓**1%** (w/w) & ↑**3%** (y/y), as spot rates @ **$2,69/kg** & contract @ **$2,40/kg**.

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *227th* update.
[2] '*Current*' means the last seven days (a week's) of available data.
[3] '*Previous*' means the preceding 8-14 days (a week) of available data.
[4] '*Monthly*' means the last months' worth of available data compared to the same month in the previous year—most metrics: Feb vs Feb.
[5] Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **10 585 TEUs** was handled per day, representing a slight decrease from **11 547 TEUs** the previous week. Adverse weather, vacant berths, dredging, and equipment breakdowns mainly characterised port operations. Towards the end of the week, adverse weather conditions disrupted operational performance in Cape Town, while equipment breakdowns, shortages, and dredging operations also impacted operations in Durban. Citrus exports have commenced early via Durban, with the 2025 season forecast at **106 000 FEUs** — up **↑10%** from 2024 and comparable to 2023. Strong winds and vacant berths ensured operational delays at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. The latest reports indicate that the Maersk Colombo 511E will skip the port of Cape Town and proceed directly to Coega to maintain its schedule and ensure a timely arrival in Jebel Ali. Furthermore, over the weekend, the rail network experienced intermittent power failures, resulting in operational delays of 6-12 hours.

Globally, in 2024, the world's top 30 container ports saw a robust **↑7%** year-on-year throughput growth, led by China, the US, and India. Shanghai remained the busiest port, about **10 million TEUs** ahead of Singapore. Only Hong Kong and Xiamen posted declines. For comparison, Durban handled **2,6 million TEUs**, placing **~90th globally**. Schedule reliability improved to **53,3%** in Feb 2025, with Wan Hai (**59,5%**) leading carriers. At the alliance level, the newly launched Gemini Cooperation posted an impressive **94% reliability** at origin ports, followed by MSC (**79,6%**) and Premier Alliance (**60,4%**). Traditional alliances lagged: Ocean Alliance (**54,1%**), THE Alliance (**45,3%**), and 2M (**44,2%**). These early metrics suggest a potential realignment in operational performance as new alliance structures mature ahead of full implementation by July. Lastly, HMM has taken delivery of the HMM Green, the first in a series of nine **9 000 TEU methanol-fuelled** containerships ordered in 2023.

International air cargo to and from South Africa dropped for a second consecutive week. The daily average of air cargo handled at ORTIA in the previous week amounted to **541 659 kg** inbound (**↓7%**, w/w) and **376 084 kg** outbound (**↓4%**). Nevertheless, the current volumes remain slightly above last year's levels (**↑3%**, y/y) and a significant **↑17%** above the same pre-pandemic levels of 2020. In February, international air cargo volumes rose month-on-month in Johannesburg (**↑12%**) and Durban (**↑19%**) but fell in Cape Town (**↓19%**), while year-on-year, Durban recorded a substantial increase (**↑54%**), Cape Town a moderate gain (**↑8%**), and Johannesburg a slight decline (**↓5%**). Domestic volumes for February indicate that air cargo volumes surged in Cape Town (**↑50%** m/m; **↑17%** y/y), declined in Johannesburg (**↓6%** m/m; **↓3%** y/y), and showed mixed results in Durban with a modest monthly increase (**↑6%**) but a year-on-year decrease (**↓6%**).

Operationally, at an ACSA Stakeholders meeting, the industry raised urgent concerns over lease delays, with 87% of cargo leases—93% at ORTIA—having expired, which severely impacts investment and operational certainty. In response, ACSA outlined key developments, including **(1)** a new Commercial Contracting Policy to ensure transparent, **(2)** transformation-aligned procurement, **(3)** mandatory B-BBEE level 4 compliance for licence holders **(4)** a R200 million refurbishment of the ORTIA Cargo Precinct and **(5)** phased Midfield Cargo Development projects aligned with long-term growth forecasts, among other developments.

Internationally, global air cargo tonnages remained stable with a slight **↓1%** week-on-week dip but **↑3%** growth year-on-year, while average rates continued their upward trajectory, reflecting sustained post-Lunar New Year recovery and regional market dynamics. In other air cargo news, the surge in semiconductor demand—particularly for AI-related applications—is expected to partially offset the decline in air freight volumes previously driven by e-commerce.

Cargo flows across the Lebombo Border Post and N4 Corridor have decreased slightly this week, with truck volumes at **1 466 HGVs per day** (**↓1%**, w/w). There was an average of **2,7 hours**' worth of queuing time at the border, as the average processing time hovered around **2,5 hours** per crossing. Rail to Maputo decreased slightly to an average of **five trains a day** in the last week, as sugar trains from Eswatini were stable at around **two trains a day**.

For the rest of the SADC borders, the average queue times decreased by around **half an hour** from last week, as transit times decreased by **a similar magnitude**. The median border crossing times at South African borders decreased by approximately **half an hour**, averaging **~10,4 hrs** (**↓6%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) also decreased, by **about 20 minutes**, averaging **~5,0 hrs** (**↓4%**). On average, three SADC borders took more than a day to cross last week, including Beitbridge, Kasumbalesa (the worst affected, with an average of nearly **two days** from the **Zambia side**), and Skilpadshek. Other developments include **(1)** Groblersbrug border post reopened, **(2)** operational bottlenecks in and around Zimbabwe, and **(3)** regional protests and border closures in Mozambique's Tete province.

In concluding this edition, Durban's fall from a top-50 global port in 2009 to a position near 100th in 2024 is more than a symbolic decline – it is a stark indicator of South Africa's waning global competitiveness. As global throughput surges and new alliances reshape operational benchmarks, South Africa risks being left behind. The time for reform to continue – and be accelerated – is now. From crisis to competitiveness, we must reposition logistics not as a cost line but as a strategic trade enabler. This requires treating data as infrastructure, fast-tracking digital platforms and command centres, and revitalising intermodal integration – especially across Gauteng's inland hubs and regional corridors. Without decisive action, the country's trade potential will remain constrained, and the economic toll (already estimated at more than R1 billion per day) will deepen. Yet, there is a clear path forward: with focused investment and collaborative reform, South Africa can re-establish itself as a logistics leader on the continent and a key player in AfCFTA corridors.

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 Mondays to Sundays.

Table 2 – Container Ports – Weekly flow reported for 24 to 30 March (measured in TEUs)

7-day flow reported (24/03/2025 – 30/03/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	3 905	27 333	↓7%
New Pier (Pier 1)	1 711	11 980	↓1%
Cape Town Container Terminal	1 768	12 375	↓20%
Ngqura Container Terminal	1 716	12 015	↓32%
Port Elizabeth Container Terminal	197	1 379	↓45%
Other	1 287	9 011	↑135%
Total	**10 585**	**74 093**	↓8%

Source: Calculated from TPT, 2025. Updated 30/03/2025.

A slightly reduced average of **~10 585 TEUs** (↓8%) was handled per day for the last week (*24 to 30 March, Table 2*), slightly below the projected average of **~11 381 TEUs** (↓7% actual versus projected).

For the coming week, an increased average of **~11 381 TEUs** (↑8%) is predicted to be handled (*31 March to 6 April, Table 3*). Adverse weather, vacant berths, dredging, and equipment breakdowns mainly characterised port operations.

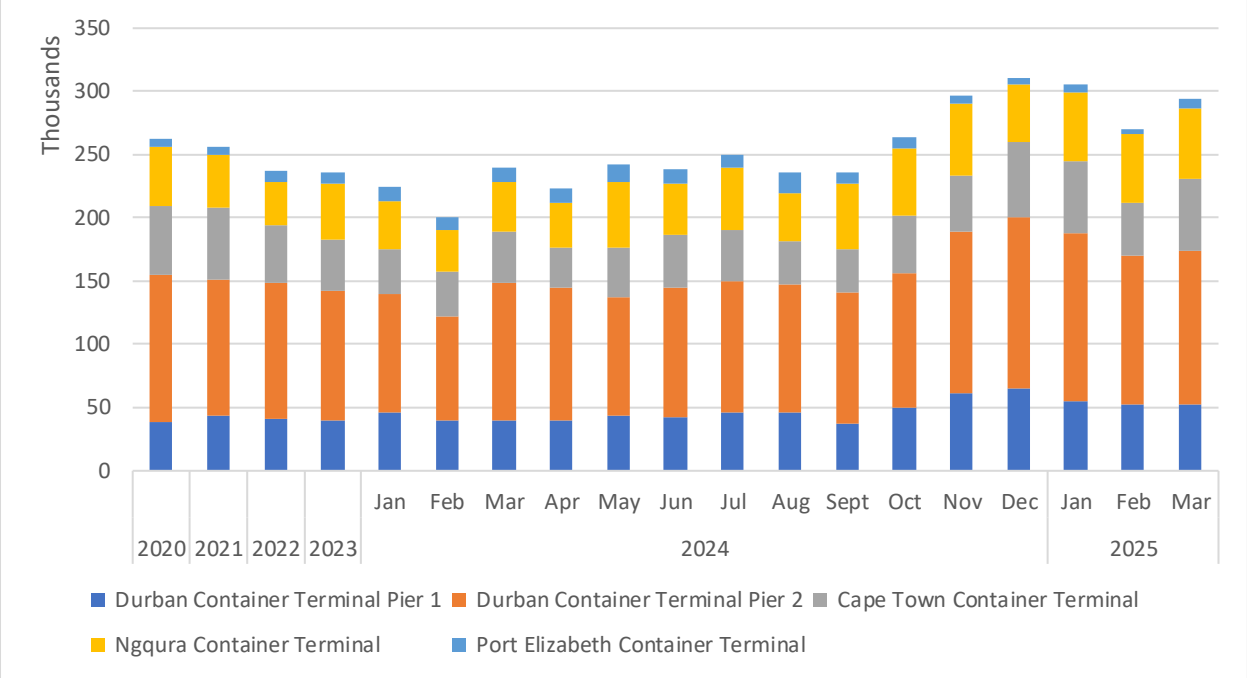
Table 3 – Container Ports – Weekly flow projected for 31 March to 6 April (measured in TEUs)

7-day flow reported (31/03/2025 – 06/04/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 440	31 078	↑14%
New Pier (Pier 1)	1 641	11 490	↓4%
Cape Town Container Terminal	2 113	14 793	↑20%
Ngqura Container Terminal	1 989	13 922	↑16%
Port Elizabeth Container Terminal	272	1 907	↑38%
Other	925	6 474	↓64%
Total	**11 381**	**79 665**	↑8%

Source: Calculated from TPT, 2025. Updated 30/03/2025.

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.

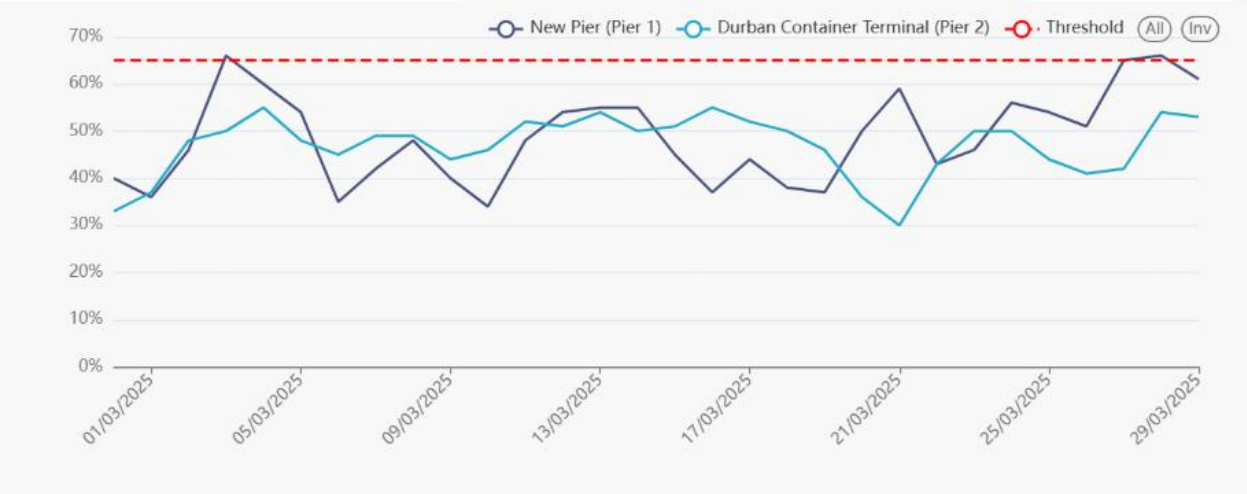
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 30/03/2025.

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

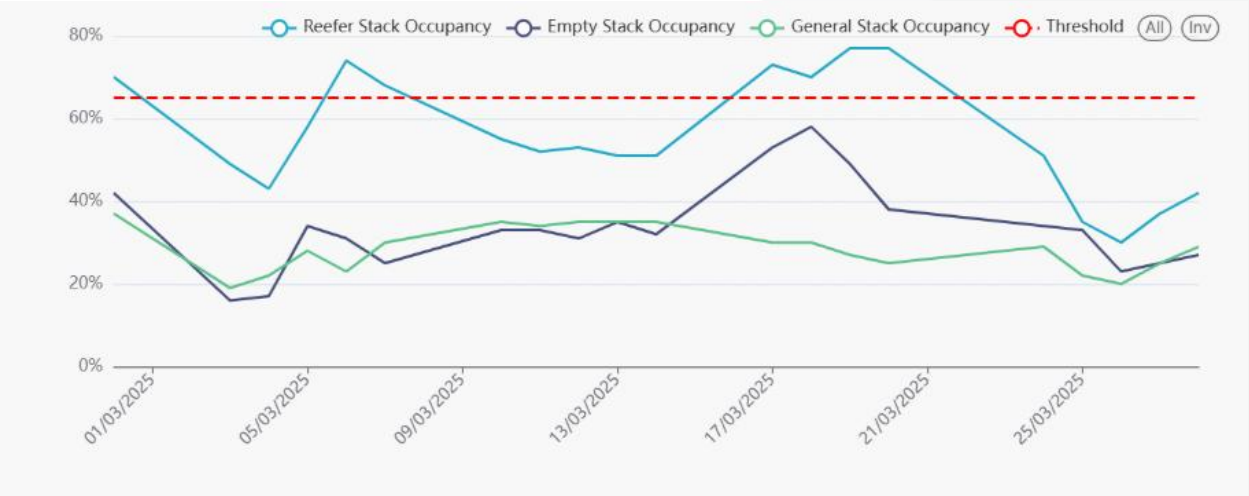
Figure 4 – Stack occupancy in DCT, general-purpose containers (1 March to present; a day on the day)



Source: Calculated using data from Transnet, 2025, and updated 30/03/2025.

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 (1 March to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 30/03/2025.

b. Summary of port operations

i. Weather and other delays

- Towards the end of the week, adverse weather disrupted operational performance in Cape Town.
- Equipment breakdowns and shortages, as well as dredging disrupted operations in Durban.
- Strong winds and vacant berths ensured operational delays at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

ii. Cape Town

On Friday, CTCT recorded three vessels at berth and four at anchor, as adverse weather conditions proved to be the primary operational constraint. On the landside, between Monday and Friday, the terminal managed to service at least 3 374 trucks while handling approximately 87 rail units. On the waterside, the terminal executed approximately 6 989 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 29%**, **reefers at 41%**, and **empties at 27%**. Additionally, the terminal operated with **eight STS cranes**, **22 RTGs**, and **64 hauliers** towards the end of the week. The latest reports indicate that Crane LC2 remained out of commission for the majority of the week. The terminal managed to retrieve the container that went overboard one of the berthed vessels after a collision with Crane LC1. The retrieval operations seemingly created berthing delays of up to four days at that specific berth.

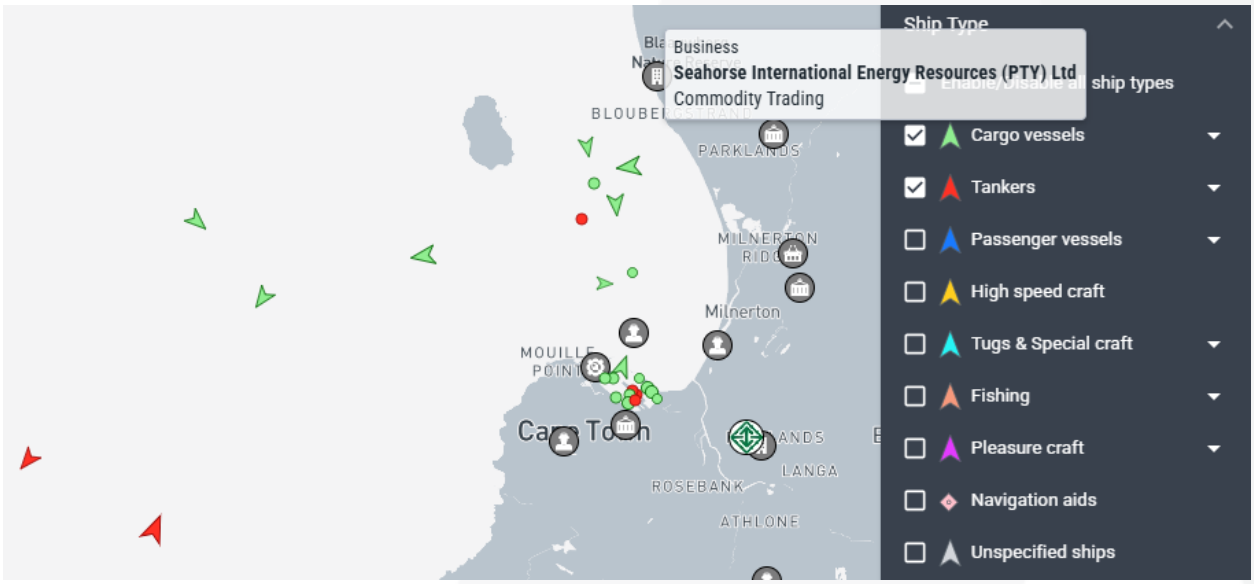
The latest reports indicate that the Maersk Colombo 511E will skip the port of Cape Town and proceed directly to Coega to maintain its schedule and ensure a timely arrival in Jebel Ali. The decision was made due to the expectation of significant delays in Cape Town, with a current waiting time of 10 days. Additional delays are also anticipated due to weather conditions between March 30 and April 2. All export bookings will be amended to Maersk Florence 512E. All import containers will be discharged in Coega and then transferred to alternative services for their respective destinations.

On Thursday, CTMPT recorded two vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 173 container moves and 2 179 tons across the quay on the waterside. On the landside, 210 trucks were processed during the same period. Stack occupancy was recorded at 23% for general cargo, 53% for reefers, and 1% for empties. Towards the end of the week, the terminal operated

with one crane and four straddle carriers. The Crane LM550 went out of commission due to a fire incident on the machine, while the Crane LM400 experienced challenges with its spreader.

Between 17 and 23 March, the FPT terminal handled five vessels: two multi-cargo, one dry bulk, one breakbulk, and one container vessel. Berth occupancy during this period was recorded at 50%. The terminal planned to handle six more vessels between 24 and 30 March, with another six vessels scheduled between 31 March and 06 April. The late arrival of cargo, equipment breakdowns, and adverse weather conditions ensured operational constraints during this period.

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



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

iii. Durban

On Friday, Pier 1 recorded two vessels on berth, operated by five gangs, with one vessel at anchor. Stack occupancy was **66%** for **GP containers**. Between Monday and Friday, the terminal executed approximately 4 787 gate moves and 244 rail moves on the landside. The **average TTT** for the week was **~91 minutes** (**↑38%**, w/w) and an average **staging time** of **~46 minutes** (**↑39%**). Additionally, the terminal moved over 4 200 TEUs across the quay on the waterside during the same period. The terminal operated with **five STS cranes** and **11 RTGs** towards the end of the week. Furthermore, the terminal experienced a system issue that impacted operations for around two hours.

Pier 2 had three vessels on berth and zero at anchorage on Thursday, as adverse weather conditions, dredging, and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **54%** for **GP containers**. The terminal operated with **eight gangs** and moved over 9 000 containers across the quay between Monday and Friday on the waterside. The low number of waterside gangs was primarily attributed to dredging operations at berth 204. Approximately 10 652 gate moves were executed on the landside during the same period. Over the last week, the average TTT was **~83 minutes** (**↑46%**, w/w) and the staging time increased by **~60 minutes** (**↑232%**, w/w). Approximately 1 643 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **53** and **58** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **63%** during this period.

TPT shared communication regarding the conclusion of the Back of Port dispensation for import container rail shuttles between DCT Pier 1 and Pier 2 to the Bayhead Terminal, confirming that the subsidy will end on March 31. Industry players are encouraged to engage Transnet Freight Rail to secure capacity post-dispensation, as the Bayhead Terminal remains operationally ready to support this service.

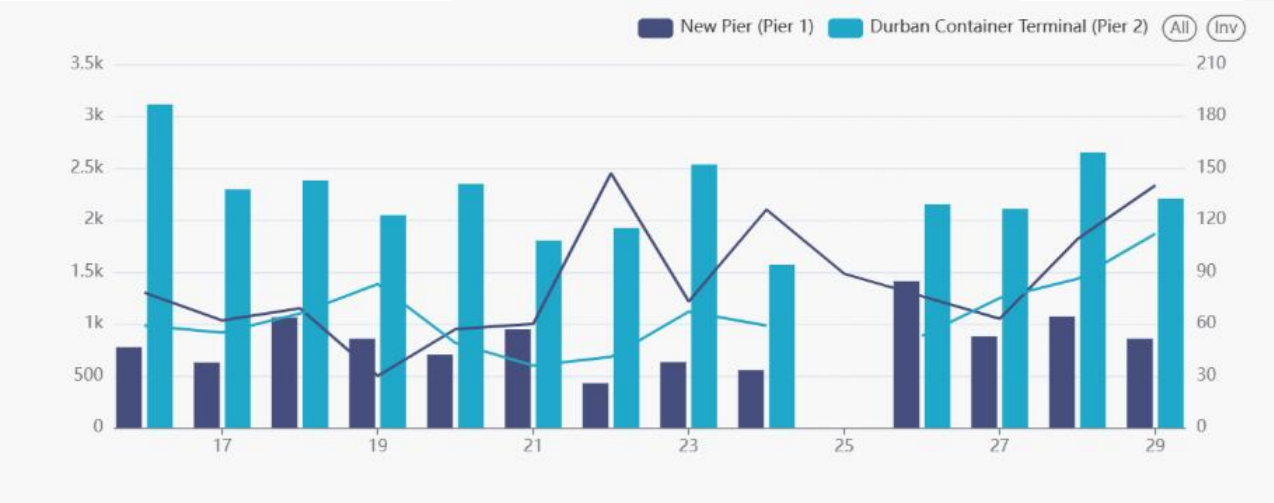
Durban's MPT terminal recorded two vessels at berth on Friday and zero at outer anchorage. Stack occupancy for containers was 56%, with the breakbulk stack remaining undisclosed. In the preceding 24 hours, the terminal handled 622 containers and 884 tons of breakbulk on the waterside. On the landside, 375 container trucks and 62 breakbulk RMTs were serviced. During this period, three cranes, seven reach stackers, seven forklifts, and 20 ERFs were in operation. The latest reports indicate that the fourth crane is expected to return to service by the end of July.

On Friday, the Maydon Wharf MPT recorded one vessel at berth and none at anchor. On the waterside, 690 tons were handled across the quay in the previous 24 hours. On the landside, no trucks were handled during this period. At the agri-bulk facility, zero vessels were berthed or at anchor on Friday. However, a vessel completed operations on Thursday, resulting in the terminal handling 4 405 tons across the quay.

On Thursday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with none at anchorage. In the 24 hours leading to Friday, the terminal handled 1 389 road and 145 rail units on the landside while handling 2 905 units on the waterside. Overall stack occupancy was 35%, 70% at Q&R, and 40% at G-berth. During this period, the terminal had 128 high-and-heavy (abnormal loads) on hand and managed to handle 42.

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.

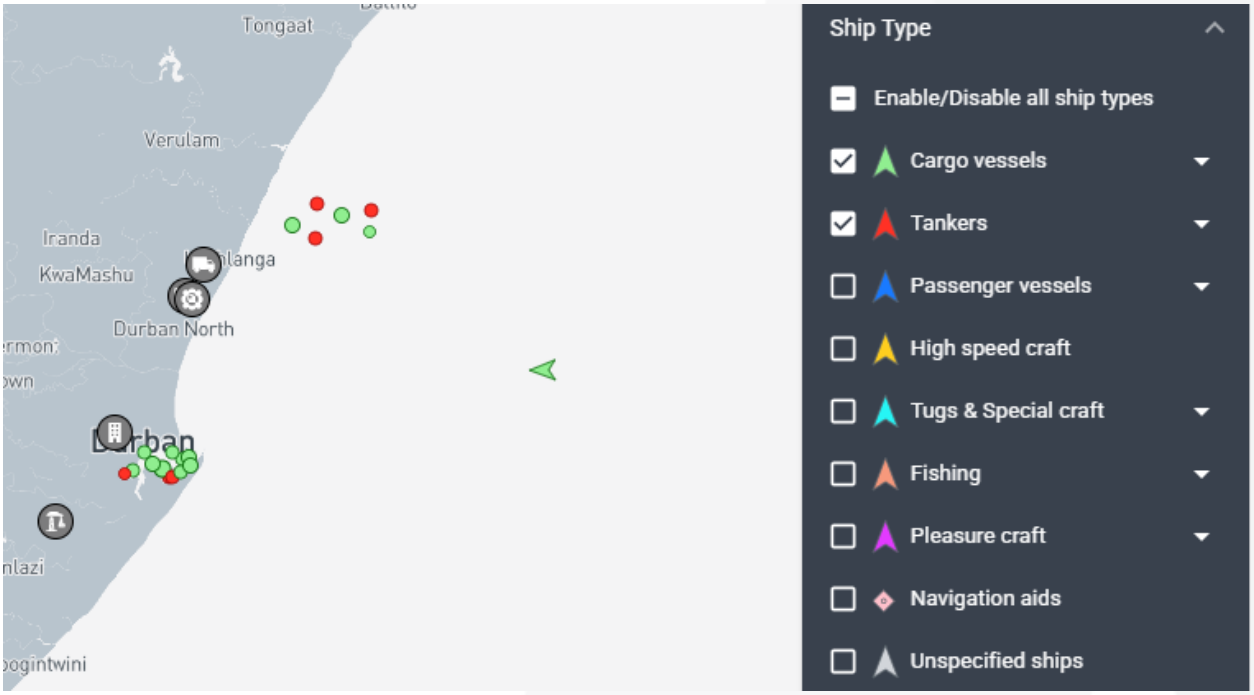
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 30/03/2025.

The queue of container vessels waiting outside Durban remains relatively low. On Monday evening (31 March), **zero** container vessels were waiting for Pier 1, **zero** for Pier 2, and **one** for Point. The queue of dry, liquid, and breakbulk vessels has also dissipated in recent weeks, as evidenced by the snapshot:

Figure 8 – Durban vessel view (per vessel group)



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

iv. Richards Bay

On Friday, Richards Bay had nine vessels at anchor and 16 on the berth, translating to five vessels at DBT, four at MPT, four at RBCT, and two at the liquid bulk terminal, with one vessel undergoing repairs. Three tugs and one pilot boat operated for marine resources towards the end of the week. The port helicopter went out of commission between Thursday and Friday, but the reasoning hereof remained undisclosed. The daily average for the week increased again to around **193 300 tons** (**↑1%**, w/w). An average of **22 trains** (up by one from last week) were serviced on the landside, which matches the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded two vessels on berth and zero at anchor, with none drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. Stack occupancy figures were recorded at 15% for reefers, 22% for reefer ground slots, and 8% for the general stack. Despite having vacant berths and experiencing equipment breakdowns during this period, the terminal handled over 2 700 TEUs and 157 reefers on the waterside. Approximately 554 trucks were processed on the landside at a TTT of ~29 minutes. Towards the end of the week, the terminal had eight STS cranes, 26 RTGs, and 22 hauliers in service.

On Thursday, GCT had one vessel at berth and none at outer anchorage. Marine resources, including two tugs, a pilot boat, two pilots, and one berthing gang, were in operation over the 24 hours leading up to Friday. During this period, 69 trucks were processed at a TTT of ~16 minutes on the landside, while 377 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 12% for the general stack, 2% for reefers, and 21% for reefer ground slots. Towards the end of the week, the terminal had two STS cranes, one mobile harbour crane, and ten straddle carriers in service.

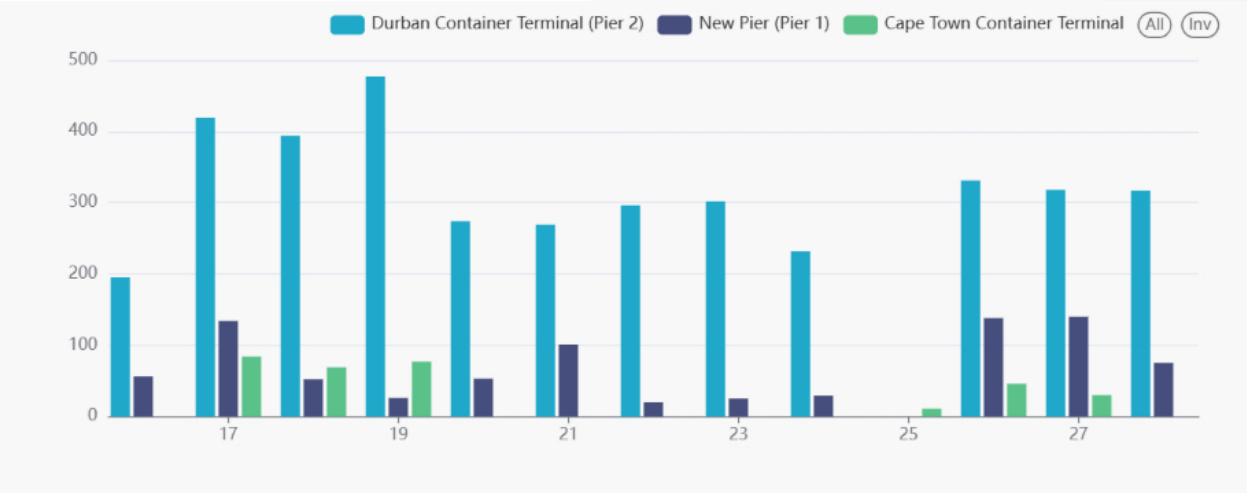
vi. Citrus season forecast

The citrus export season traditionally runs from April to September, with peak volumes typically observed between weeks 24 and 36. Early-season lemon exports have already commenced, predominantly through the Port of Durban, during weeks 4 to 12. The current national forecast for the 2025 season stands at approximately **106 000 FEUs** — representing a **↑10%** year-on-year increase compared to 2024 volumes and broadly in line with 2023 figures.

vii. Transnet Freight Rail (TFR)

Over the weekend, the rail network experienced intermittent power failures, resulting in operational delays of 6-12 hours. Additionally, towards the end of the week, DCT Pier 2 had 108 ConCor units on hand with a dwell time of 36 hours and 380 over-border units with a dwell time of 44 days. Lastly, TFR reported incidents of cable theft in the Pretoria region, which delayed train movements to Pretoria on 2 April.

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



Source: Calculated using data from Transnet, 2024. Updated 30/03/2025.

In the last week (*24 to 30 March*), rail cargo out of Durban was reported at **2 442** containers, down **↓14%** from the previous week's **2 842** containers.

2. Air Update

a. International air cargo

The following table shows the inbound and outbound air cargo flows to and from ORTIA for the week beginning 17 March. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *March 2024* averaged **~895 184 kg** daily.

Table 4 – International inbound and outbound cargo from OR Tambo

Flows	17-Mar	18-Mar	19-Mar	20-Mar	21-Mar	22-Mar	23-Mar	Week
Volume inbound	375 341	230 541	448 795	188 134	361 871	192 070	1 994 861	**3 791 613**
Volume outbound	138 654	190 314	210 618	201 925	188 438	173 825	1 528 817	**2 632 591**
Total	**513 995**	**420 855**	**659 413**	**390 059**	**550 309**	**365 895**	**3 523 678**	**6 424 204**

Courtesy of ACOC. Updated: 30/03/2025.

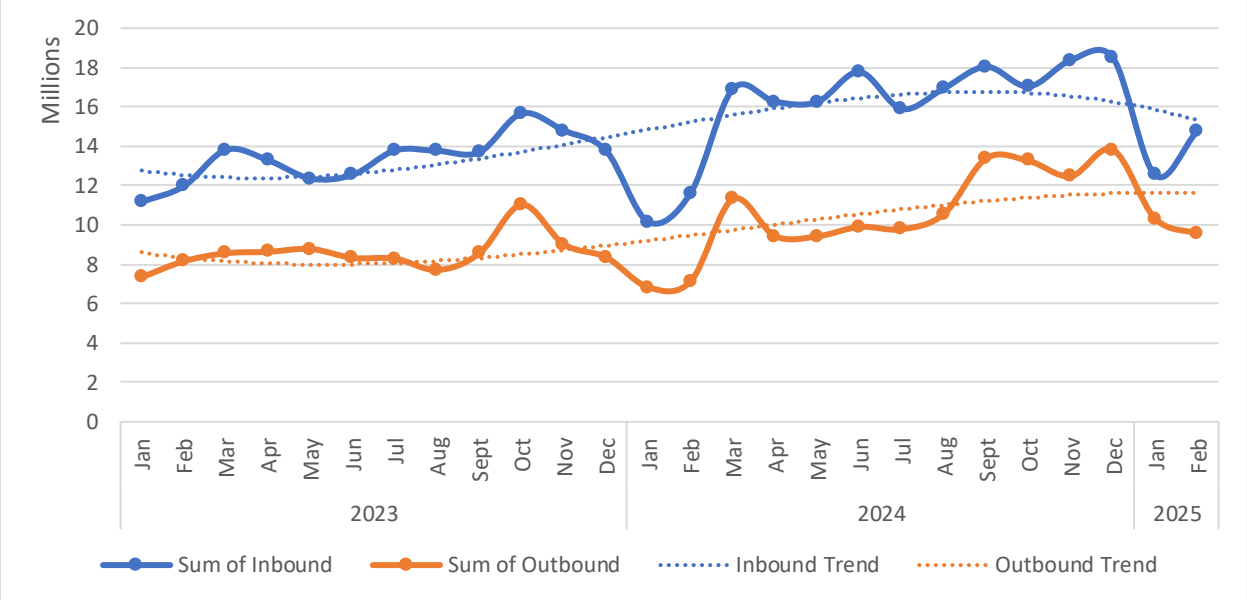
In the air cargo space, the daily average of air cargo handled at ORTIA in the previous week amounted to **541 659 kg** inbound (**↓7%**, w/w) and **376 084 kg** outbound (**↓4%**). Nevertheless, the current volumes remain slightly above last year's levels (**↑3%**, y/y) and a significant **↑17%** above the same pre-pandemic levels of 2020.

For the full month of February:

- Johannesburg increased by **↑12%** (m/m) versus January, but decreased by **↓5%** (y/y) versus 2024.
- Cape Town decreased by **↓19%** (m/m) versus January, but increased by **↑8%** (y/y) versus 2024.
- Durban increased by **↑19%** (m/m) compared to January and by a significant **↑54%** (y/y) compared to 2024.

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: 30/03/2025.

b. Cargo operations update

At an ACSA cargo stakeholders engagement, several important developments were discussed, notably the following:

- **Lease challenges & stakeholder concerns:**
  - Industry bodies have formally requested urgent intervention from ACSA to resolve protracted lease delays, citing the negative impact on cargo sector investment and operational certainty.
- **Cargo lease status:**
  - Approximately 87% of cargo leases across ACSA's portfolio have expired, with ORTIA mainly affected at 93%, raising concerns over business continuity and long-term planning.
- **Commercial contracting policy & procurement framework:**
  - ACSA's new Commercial Contracting Policy, approved in December 2024, aims to institutionalise fair, transparent, and transformation-aligned procurement processes for all commercial opportunities.

- **Transformation imperatives & B-BBEE compliance:**
  - Minimum B-BBEE level 4 compliance has been instituted for all licence holders in the cargo environment, with detailed transformation plans required as part of contractual obligations.
- **ORTIA cargo precinct refurbishment:**
  - The ORTIA Cargo Precinct refurbishment programme has resumed, with procurement underway, targeting R200 million in infrastructure upgrades to meet current building standards and enhance operational functionality.
- **Midfield cargo development (ORTIA):**
  - Phase 1 of the ORTIA Midfield Cargo Development, with a planned capacity of 750 000 tonnes per annum, is scheduled to commence construction in 2027, following regulatory approvals and market assessments.
- **Midfield cargo development – key dependencies & timeline:**
  - A suite of enabling infrastructure projects linked to the *Midfield Cargo Precinct* is in the planning and design stages, with completion expected by 2035 to align with projected growth in cargo and passenger volumes.
- **Legal & regulatory framework:**
  - Recent legal precedent has reaffirmed that ACSA's lease awards must comply with Section 217 of the Constitution, which mandates fair, transparent, and cost-effective processes in line with national procurement legislation.

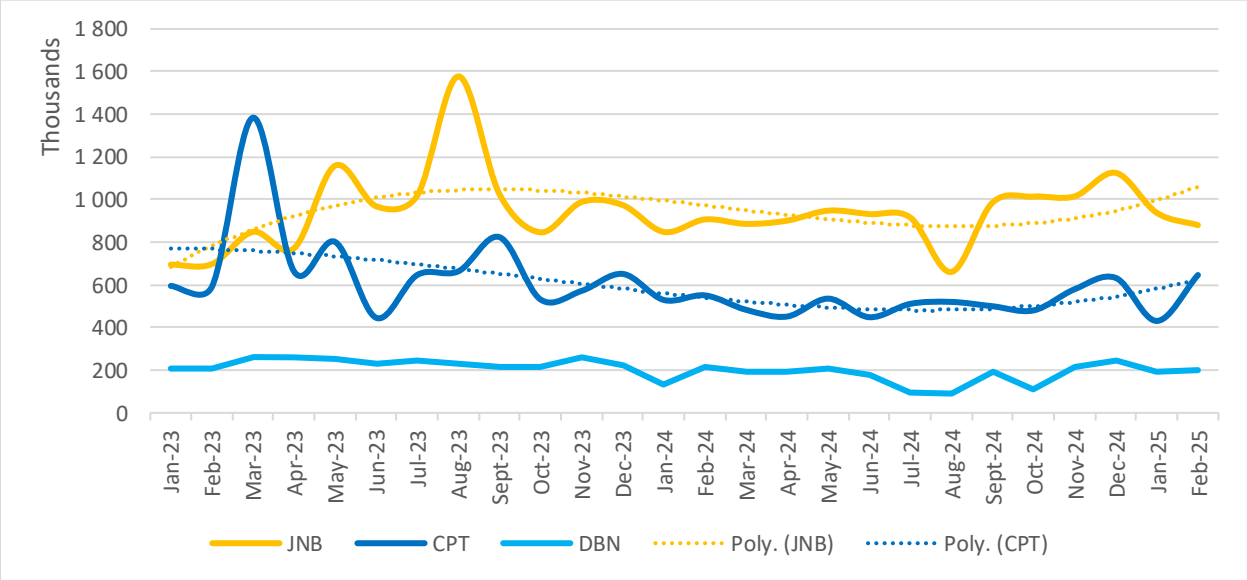
c. Domestic air cargo

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

- Johannesburg decreased by **↓6%** (m/m) versus January and by **↓3%** (y/y) versus 2024.
- Cape Town increased by **↑50%** (m/m) versus January and by **↑17%** (y/y) versus 2024.
- Durban increased by **↑6%** (m/m) compared to January, but decreased by **↓6%** (y/y) compared to 2024.

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 30/03/2025.

3. Road and Regional Update

a. Lebombo border post update

As of the week spanning 24 to 30 March, cargo flows are relatively unabated across the N4 corridor, with no issues reported. The following notes summarise the recent developments:

- Truck volumes decreased slightly this week, with truck volumes at **1 466 HGVs per day** (**↓1%**, w/w).
- There was an average of **2,7 hours**' worth of queuing time at the border, as the average processing time hovered around **2,5 hours** per crossing.
- Rail to Maputo decreased slightly to an average of **five trains a day**.
- Sugar trains from Eswatini was 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	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**		**2 000**	**20**	**10**	**6**	**4**
24-Mar-25	1 133	1 073	956	41	7	73	20		238	**6**	4	0	2
25-Mar-25	1 302	1 207	966	138	37	70	21		237	**6**	5	0	1
26-Mar-25	1 537	1 423	1 015	243	43	89	52		271	**2**	2	-	-
27-Mar-25	1 607	1 491	1 050	222	63	94	62		292	**0**	-	-	-
28-Mar-25	1 535	1 541	1 089	272	50	69	61		248	**12**	8	1	3
29-Mar-25	1 627	1 495	1 094	243	27	76	**55**		286	**2**	-	2	-
30-Mar-25	1 520	1 487	1 182	185	22	55	43		199	**0**	-	-	-
% of design capacity	**98%**	**93%**	**88%**	**96%**	n/a	**150%**	**90%**	n/a	10%	**20%**	**48%**	**13%**	**50%**
% change (d/d)	-7%	-1%	8%	-24%	-19%	-28%	-22%	n/a	8%	-100%	-100%	*	n-/a

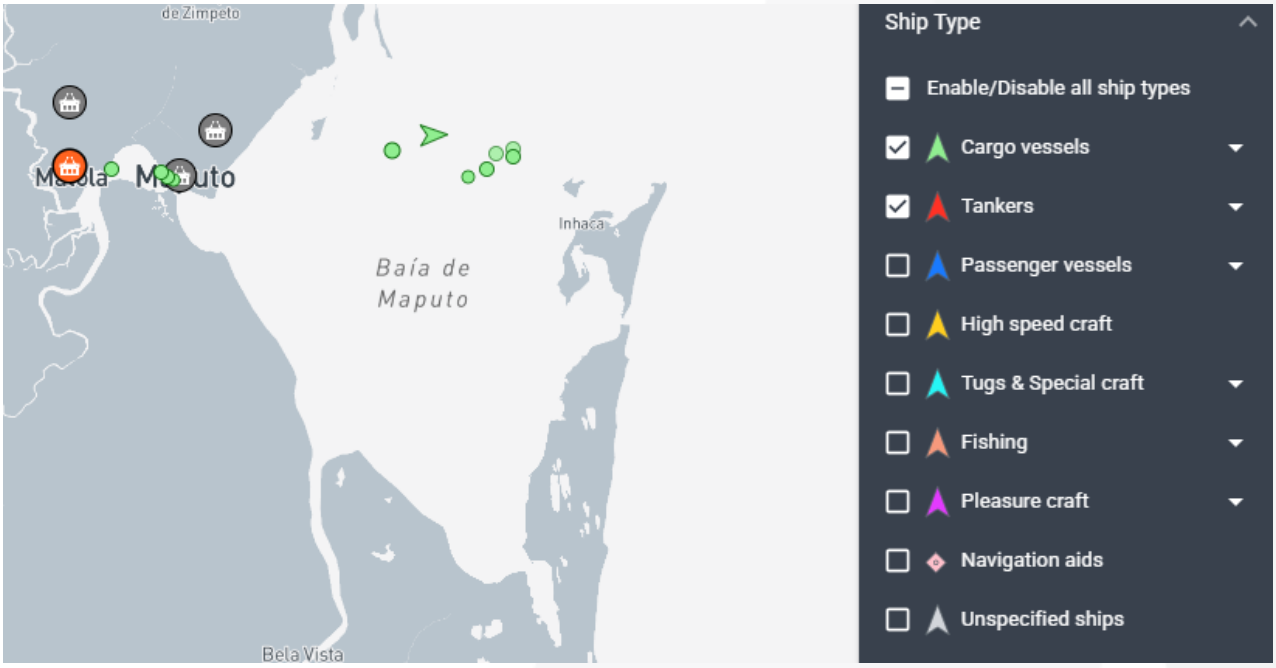
No delays

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 30/03/2025.

** = 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 31/03/2025 at 14:00.

b. SADC cross-border and road freight delays

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

- The average queue times decreased by around **half an hour** from last week, as the transit times decreased by about the **same magnitude**.
- The median border crossing times at South African borders decreased by approximately **half an hour**, averaging **~10,4 hrs** (**↓6%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) also decreased, by **about 20 minutes**, averaging **~5,0 hrs** (**↓4%**).

1. **Groblersbrug border post reopened:**
    - Groblersbrug border post reopened on 27 March at 14:00.
    - In line with standard contingency measures, transporters may continue to reroute via Kopfontein, Skilpadshek, Ramatlhabama, and Beitbridge, provided their cargo declarations were framed before 27 March.
2. **Operational bottlenecks:**
    - Substantial delays are being reported at Beitbridge due to intensified inspections by ZIMRA Anti-Smuggling Unit.
    - Numerous complaints have been lodged by transporters, including a case where a truck was held for two days before being issued a seizure notice—ultimately resolved after FESARTA intervention, which reaffirmed that liability for contraventions rests with the transporter and not the driver alone.
    - A separate transporter reported encountering six roadblocks between Beitbridge and Masvingo (approximately 290 km), which contributed to significant inefficiencies.

3. **Regional protests and border closures:**
    - The Mwanza OSBP was temporarily closed earlier this week following driver protests linked to a spate of violent attacks on truck drivers in Mozambique.
    - The protest was resolved following stakeholder engagements in Tete Province, and operations have since resumed.
4. **Policy clarity at Kasumbalesa:**
    - Drivers entering the DRC at Kasumbalesa have reportedly been charged a $50 visa fee on both entry and exit.
    - However, clarification from a DRC government source confirmed the fee applies only on entry and is not levied on drivers from Zimbabwe or Tanzania.
5. **Emerging political risks:**
    - Unconfirmed reports from Zimbabwe suggest that the military has issued directives advising against school attendance and vehicle movement on 31 March, accompanied by a potential border closure.
    - Although no official confirmation has been issued since, stakeholders are advised to remain vigilant.

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

Table 6 – Delays[6] summary – South African borders (both directions)

Border Post	Direction	HGV[7] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	454	26,9	8,1	26,0	13 620	3 178
Beitbridge	Zimbabwe-SA	420	10,3	2,2	11,1	12 600	2 940
Groblersbrug	SA-Botswana	0	0,0	0,0	0,0	0	0
Martins Drift	Botswana-SA	0	0,0	0,0	0,0	0	0
Kopfontein	SA-Botswana	234	9,3	1,1	9,2	7 020	1 638
Tlokweng	Botswana-SA	131	1,0	0,3	1,0	3 930	917
Vioolsdrift	SA-Namibia	30	3,1	1,3	3,3	900	210
Noordoewer	Namibia-SA	20	1,7	0,4	1,6	600	140
Nakop	SA-Namibia	30	4,0	1,2	4,5	900	210
Ariamsvlei	Namibia-SA	20	1,0	0,4	0,6	600	140
Skilpadshek	SA-Botswana	318	27,7	1,3	27,0	9 540	2 226
Pioneer Gate	Botswana-SA	125	2,0	1,1	2,5	3 750	875
Lebombo	SA-Mozambique	1 407	1,0	0,2	1,0	42 210	9 849
Ressano Garcia	Mozambique-SA	1 480	2,7	0,5	2,5	44 400	10 360
Sum/Average		**4 669**	**6,5**	**1,3**	**6,5**	**140 070**	**32 683**

Source: TLC, FESARTA, & Crickmay, week ending 23/03/2025.

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

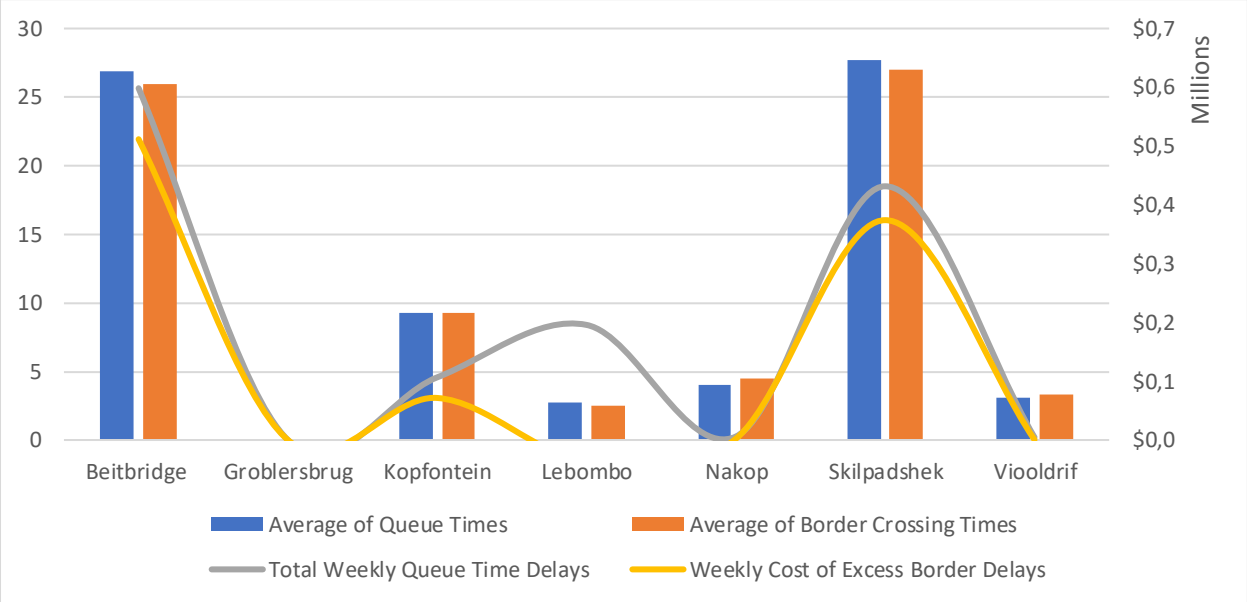
Table 7 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	12,3	3,7	12,6	9 600	2 240
Central Corridor	798	2,0	0,4	3,9	23 940	5 586
Dar Es Salaam Corridor	1 819	12,5	1,5	13,3	54 570	12 733
Maputo Corridor	2 887	1,9	0,3	1,8	86 610	20 209
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 311	9,0	1,3	9,0	99 330	23 177
Northern Corridor	2 817	1,3	0,1	1,6	92 520	21 588
Trans Caprivi Corridor	116	0,0	0,0	0,0	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	473	8,5	0,8	8,3	14 190	3 311
Trans Oranje Corridor	100	2,5	0,8	2,5	3 000	700
Sum/Average	**12 868**	**5,1**	**0,8**	**5,5**	**394 050**	**91 945**

Source: TLC, FESARTA, & Crickmay, week ending 23/03/2025.

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

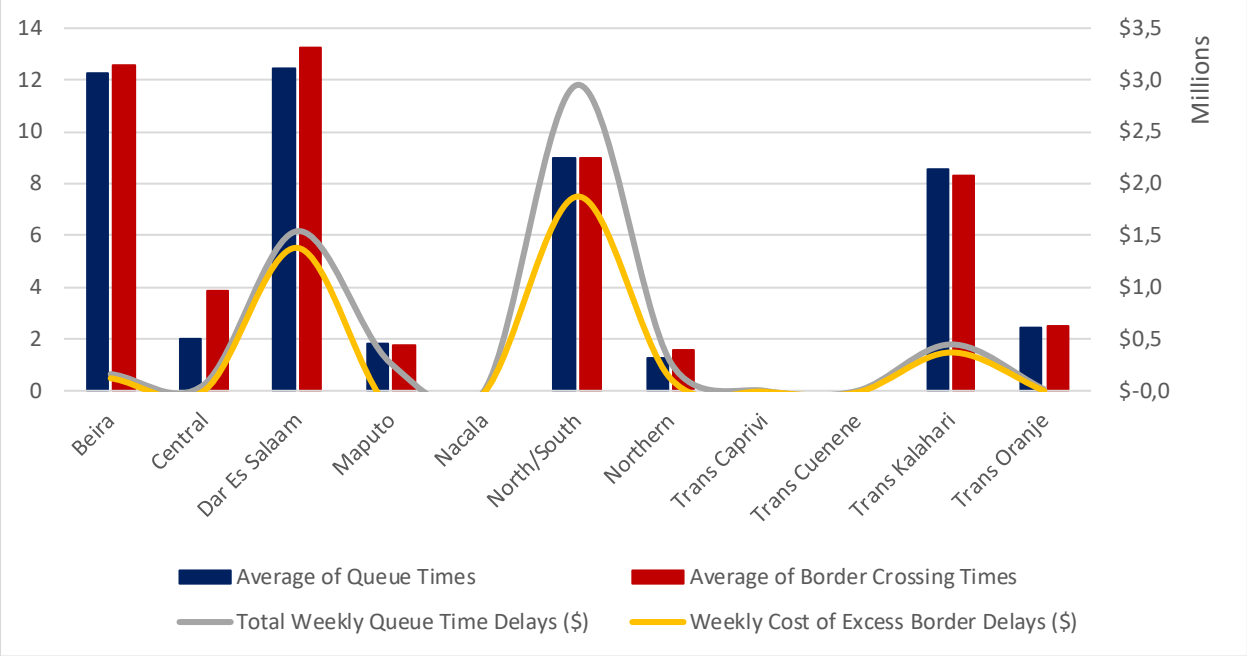
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 23/03/2025.

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 23/03/2025.

In summary, cross-border queue time averaged **~5,1 hours** (down by **~0,5 hours** from the previous week's **~5,6 hours**), indirectly costing the transport industry an estimated **$5,7 million** (**R105 million**). Furthermore, the week's average cross-border transit times hovered around **~5,5 hours** (down by **~0,3 hours** from the **~5,8 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,6 million** (**R67 million**). As a result, the total indirect cost for the week amounts to an estimated **~$9,4 million** (**R172 million**, up by **~R6 million** or **↑3,%** from **~R166 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 port throughput

In 2024, the world's 30 largest container ports collectively recorded a robust **↑7%** year-on-year increase in throughput, reflecting broad-based recovery and growth in global trade. This upward trajectory was primarily driven by increased volumes through ports in China, the United States, and the Indian subcontinent. Only two ports—Hong Kong and Xiamen—experienced a decline in annual container volumes, underlining the widespread nature of the gains elsewhere.

Several major ports reported record-breaking throughput figures, spurred by a combination of factors including heightened US consumer demand, concerns over potential labour disruptions, geopolitical tensions, and the anticipation of future tariff adjustments. Ports achieving new historical highs in 2024 include Shanghai, Singapore, Long Beach, and Tanjung Pelepas. Shanghai retained its position as the world's busiest container port; however, its lead over second-ranked Singapore remained stable, with the two ports separated by approximately **10 million TEUs**.

Table 8 – Top 30 global ports in 2024 (TEUs)

Rank (yoy)	Port Name	2024	2023	2019	Growth 24/23 %		Growth 24/19 %	
1 (1)	Shanghai	51,508,000	49,158,000	43,303,000	4.8%	↑	18.9%	↑
2 (2)	Singapore	41,124,045	39,012,950	37,195,636	5.4%	↑	10.6%	↑
3 (3)	Ningbo-Zhoushan	39,300,800	35,300,000	27,535,000	11.3%	↑	42.7%	↑
4 (4)	Shenzhen	33,398,600	29,880,000	25,771,700	11.8%	↑	29.6%	↑
5 (5)	Qingdao	30,847,000	28,770,000	21,010,000	7.2%	↑	46.8%	↑
6 (6)	Guangzhou	26,450,000	25,110,000	23,236,200	5.3%	↑	13.8%	↑
7 (7)	Busan	24,402,022	23,153,509	21,992,000	5.4%	↑	11.0%	↑
8 (8)	Tianjin	23,292,500	22,187,100	17,300,700	5.0%	↑	34.6%	↑
9 (9)	LA/LB	19,947,077	16,648,349	16,969,666	19.8%	↑	17.5%	↑
10 (10)	Dubai/Jebel Ali	15,536,000	14,473,000	14,111,000	7.3%	↑	10.1%	↑
11 (12)	Port Kelang	14,644,527	14,061,022	13,580,717	4.1%	↑	7.8%	↑
12 (13)	Rotterdam	13,820,000	13,446,709	14,810,804	2.8%	↑	-6.7%	↓
13 (11)	Hong Kong	13,691,000	14,401,000	18,303,000	-4.9%	↓	-25.2%	↓
14 (15)	Antwerp-Bruges	13,517,000	12,500,000	11,860,204	8.1%	↑	14.0%	↑
15 (14)	Xiamen	12,255,700	12,553,700	11,122,180	-2.4%	↓	10.2%	↑
16 (16)	Tanjung Pelepas	12,253,309	10,480,537	9,077,485	16.9%	↑	35.0%	↑
17 (19)	Tanger Med	10,241,392	8,617,410	4,801,710	18.8%	↑	113.3%	↑
18 (17)	Laem Chabang	9,554,700	8,868,200	7,980,560	7.7%	↑	19.7%	↑
19 (18)	Kaohsiung	9,228,418	8,833,831	10,428,634	4.5%	↑	-11.5%	↓
20 (19)	Beibu Gulf*	9,030,000	8,020,000	n.a.	12.6%	↑	n.a.	
21 (21)	NY/NJ	8,697,767	7,809,890	7,471,131	11.4%	↑	16.4%	↑
22 (20)	Ho Chi Minh City	n.a	8,314,000	6,848,360	n.a.		n.a.	
23 (23)	Mundra	8,231,000	7,231,000	4,732,699	13.8%	↑	73.9%	↑
24 (22)	Hamburg	7,825,000	7,755,000	9,282,012	0.9%	↑	-15.7%	↓
25 (24)	Colombo	7,792,069	6,949,912	7,228,337	12.1%	↑	7.8%	↑
26 (30)	Cai Mep	7,440,000	5,593,400	n.a.	33.0%	↑	n.a.	
27 (26)	Nhava Sheva	7,052,689	6,354,324	5,100,889	11.0%	↑	38.3%	↑
28 (25)	Jakarta	n.a	6,750,302	6,802,200	n.a.		n.a.	
29 (28)	Rizhao	6,710,000	6,260,000	4,520,000	7.2%	↑	48.5%	↑
30 (29)	Lianyungang	6,690,700	6,140,000	5,570,000	9.0%	↑	20.1%	↑

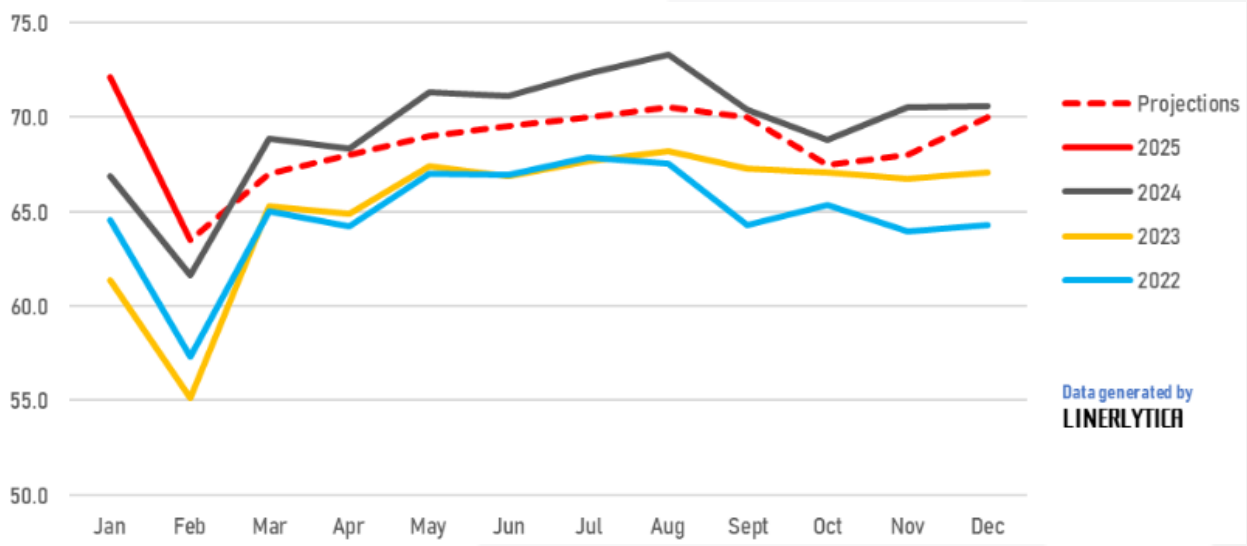
Source: Alphaliner

Ningbo-Zhoushan consolidated its position as the third-largest port globally, while Shenzhen successfully defended its fourth-place ranking after a brief challenge from Qingdao during the middle of the year. Consequently, the composition of the top 10 ports remained unchanged in 2024. For comparison, South Africa's largest port, Durban, handled about **2,6 million TEUs** in 2024, which would approximately place 90th

to 100th globally. Durban was part of the top 50 in 2009, handling a volume similar to that of last year (around **2,5 million TEUs**).[8]

After a strong start to the year in January and February, containerised cargo volumes declined in March, with the anticipated post–Chinese New Year recovery failing to materialise. Current forecasts indicate that global container volumes are likely to contract by **↓1,1%** in 2025, as subdued demand conditions are expected to persist through the traditional summer peak season.

Figure 15 – Global container throughput by month, 2022-2025 (TEU millions)



Source: Linerlytica

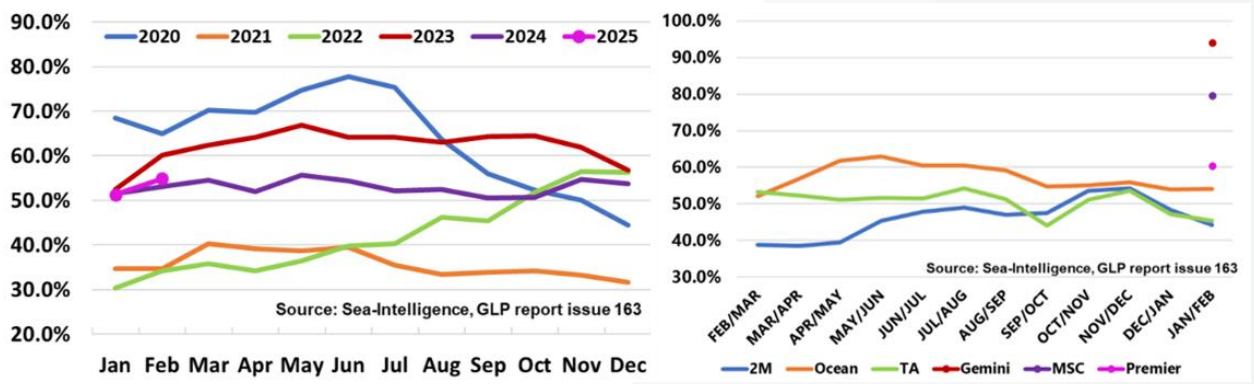
The short- to medium-term demand outlook remains uncertain. Additional downward pressure is expected following the anticipated announcement of new US tariffs on 2 April, which could further constrain containerised trade flows. Meanwhile, the Section 301 hearings on proposed duties targeting carriers operating vessels built in China concluded last week, with an updated proposal expected by the end of April.

ii. Global schedule reliably and container industry summary

According to *Sea-Intelligence's* Global Liner Performance (GLP) report, global schedule reliability improved marginally in February 2025, reaching **53,3%**—a **↑1,8%** increase from January.[9] This represents the highest monthly figure since August 2023 and continues the trend of gradual recovery. The average delay for late vessel arrivals remained stable at **5,32 days**, unchanged from January and still the lowest level since mid-2024. Among the top 13 carriers, Wan Hai recorded the highest schedule reliability at **59,5%**, followed by Hapag-Lloyd and Evergreen at **56,8%** and **56,3%**, respectively. At the bottom end, Yang Ming and OOCL again reported the lowest scores, both at **46,2%**. The gap between the most and least reliable carriers widened slightly to **13,3%**. Seven of the top 13 carriers recorded a month-on-month improvement, with Wan Hai seeing the most notable increase of **↑4,5%**. Nine carriers showed year-on-year improvements, with ZIM leading at **↑17,3%**, reflecting a strong turnaround from its performance in February 2024.

[8] World Port Rankings. 2009. World Port Rankings.
[9] Murphy, A. 25/03/2025. New carrier alliances launch with record schedule reliability.

Figure 16 – Global Schedule Reliability (%) and Alliance Schedule Reliability (days)



Source: Sea Intelligence

Notably, at the alliance level, the newly launched Gemini Cooperation recorded a striking **94,0%** schedule reliability at origin ports, followed by MSC at **79,6%** and Premier Alliance at **60,4%**. Among the traditional alliances, Ocean Alliance scored **54,1%**, while the outgoing THE Alliance and 2M registered **45,3%** and **44,2%**, respectively. While these figures are preliminary, given that the new alliances are still in the early stages of network implementation and only set to be fully operational by July 2025, they nevertheless offer an early indication of performance potential during the roll-out phase.

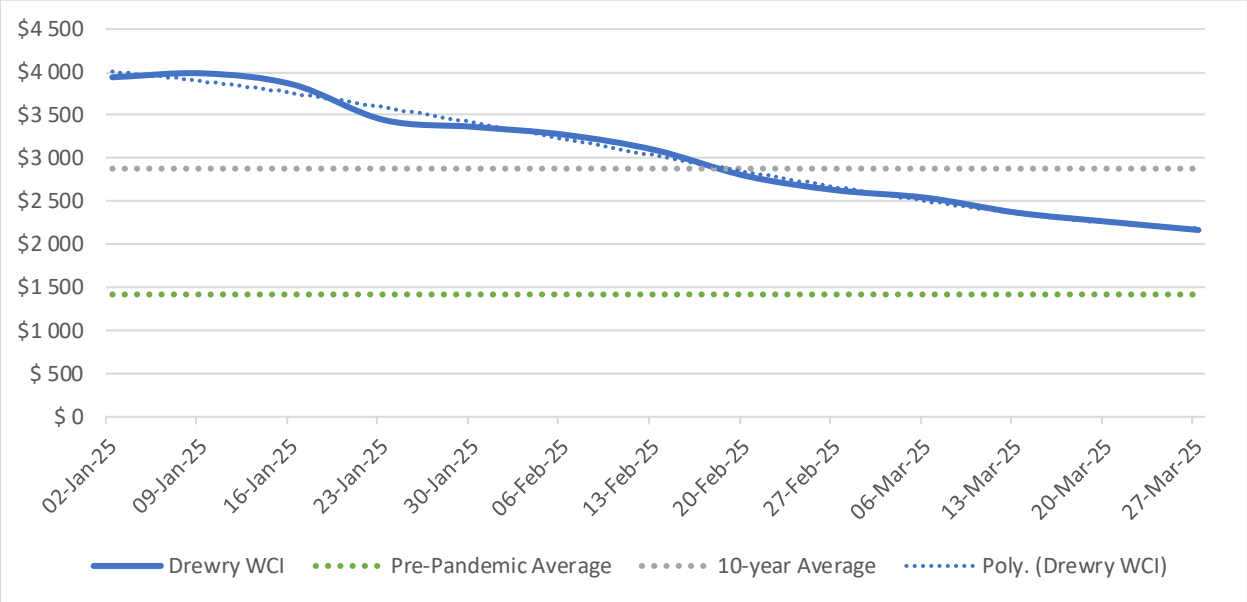
Despite the developments in schedule reliability this week, Drewry's "*Cancelled Sailings Tracker*" has steadily increased to around a **10% cancellation rate** of Pro-forma scheduling (31 March to 4 May).[10] Indeed, in response to the recent downturn in transpacific spot freight rates, MSC has announced the cancellation of six transpacific sailings over the coming weeks.[11] This decision includes blanking the Chinook service, which connects the Far East with ports such as Prince Rupert, Vancouver, and Seattle/Tacoma, as well as two additional sailings to the US West Coast scheduled for week 17. Lastly, port congestion is stable this week, as some **2,89 million TEU** (around **9,1% of the global fleet**) are stuck in the system.

iii. Global freight rates

Global container spot rates have continued their decline as Drewry's "*World Container Index*" dropped another **↓4,2%** (or **$96**) and now trades at **$2 168 per 40-ft container**[12]. This level is approximately similar to the end of December 2022 after which rates were trending below **$2 000** for much of 2023. We might not see the same trough, as the spot market subsequently rallied and increased rapidly to highs of **$6 000** around July last year. The volatility remains evident, despite the relatively benign market currently. The following figure illustrates the spot rate development since the start of the year:

[10] Drewry. 28/03/2025. Cancelled Sailings Tracker.
[11] Van Marle, G. 27/03/2025. Transpacific sees first major MSC blanks as rates fall and volumes falter.
[12] Drewry. 20/03/2025. World Container Index.

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



Source: Calculated from Drewry

Charter rates also remain elevated, as the *Harper Petersen Index* (Harpex) traded around **2 076 points** (**↑71%**, y/y) on Friday.[13]

iv. Further developments of note

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

1. **HMM receives first methanol-powered containership:**
    a. South Korean shipping company HMM has taken delivery of the HMM Green, the first in a series of nine **9 000 TEU methanol-fuelled** containerships ordered in 2023.[14]
    b. This vessel will be deployed on the Asia-India-Mediterranean route and is set to bunker bio-methanol at the port of Shanghai.

b. Global air cargo industry

In the third full week of March (17–23 March), average global air cargo rates rose by **↑4%**, returning to levels last seen in mid-January and the previous summer, as markets—particularly ex-Asia Pacific—recover post-Lunar New Year. Spot rates increased **↑5%** to **$2,69/kg** and contract rates rose **↑3%** to **$2,40/kg**, averaging **$2,45/kg** (**↑3%**, y/y) across the market. This was despite a **↓1%** week-on-week decline in chargeable weight, which remained **↑3%** higher year-on-year. Asia Pacific and Africa were the only regions to post weekly tonnage gains (**↑1%**).

[13] Harpex. 28/03/2025. Harper Petersen & Co Charter Rate Index.
[14] Bartlett, C. 26/03/2025. HMM takes delivery of its first methanol-powered containership.

Figure 18 – Capacity, chargeable weight and rates by region (last two – to five weeks, % 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		-3%	+6%		-1%	+4%		+1%	+5%
Asia Pacific		+1%	+2%		+7%	+10%		+5%	+6%
C. & S. America		+1%	-3%		-0%	-0%		+1%	-1%
Europe		-2%	+1%		-2%	-1%		+1%	-2%
M. East & S. Asia		+0%	+2%		-4%	-8%		-0%	-9%
North America		+3%	+2%		-1%	+4%		+2%	-2%
Worldwide		**+1%**	**+1%**		**+2%**	**+4%**		**+4%**	**+2%**

Source: World ACD

Spot rates rose week-on-week from Central and South America (↑**13%**), Asia Pacific (↑**5%**), and MESA (↑**3%**), though MESA rates remain ↓**17%** lower than the surge during Red Sea disruptions last year. China to USA rates saw a notable ↑**12%** (w/w) increase to **$4,53/kg**—marking their second-highest level this year. Asia Pacific to Europe volumes rose ↑**2%** (w/w), with China-Europe spot prices rebounding to **$4/kg** after four weeks of decline. MESA to Europe spot rates rose ↑**2%** (w/w), but remained ↓**23%** lower year-on-year due to normalising conditions.

In other air cargo news, the surge in semiconductor demand—particularly for AI-related applications—is expected to partially offset the decline in air freight volumes previously driven by e-commerce, offering a potential growth avenue for the sector.[15]

ENDS[16]

[15] Lennane, A. 24/03/2025. Semiconductors could compensate for air freight's lost ecommerce traffic.

[16]**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.*