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Cargo Movement Update #219[1]

Date: 2 February 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)	37 786	43 050	**80 836**	33 926	38 651	**72 577**	↑11%
Air Cargo (tons)	3 726	2 545	**6 271**	3 257	2 230	**5 488**	↑14%

Monthly Snapshot

Figure 1 – Cyclical[4] monthly cargo volume, year on year (most metrics: Dec '23 vs Dec '24, % growth)

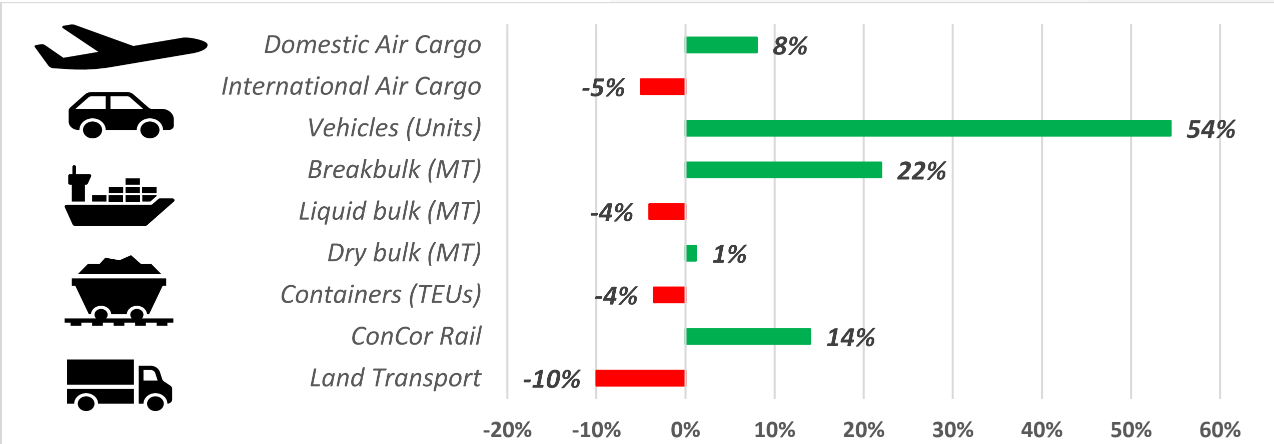
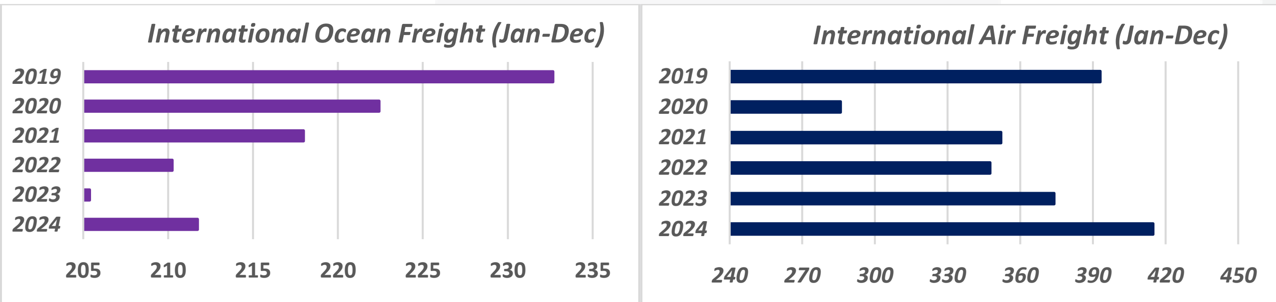


Figure 2 – Year-to-date flows 2019-2024[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~11 548 TEUs** was handled per day, with **~12 123 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 757** containers, up ↑12% from last week.
- SARS December trade stats – exports: **↓11,2%** (m/m); imports **↓1,1%**; YTD trade surplus: **R196,1 billion**.
- Cross-border queue: **↑0,7 hrs**; transit: **↑0,9 hrs**; SA borders: **10,7 hrs** (**↑44%**); SADC: **5,8 hrs** (**↑45%**).
- Schedule reliability remains between **50%-55%**; the average delay for late vessel arrivals is **~5,28 days**.
- Global container spot rates have dropped by **↓2,4%** this week to **$3 364/40-ft**; **SA: $6 810** (SFCI).
- South Africa's international air cargo increased by **↑11%** in 2024, as domestic cargo was down by **↓15%**.

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[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *219th* 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: Dec vs Dec.
[5] Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. In our container terminals, an increased average of **11 548 TEUs** was handled per day, up from **10 368 TEUs** last week. Adverse weather conditions, high swells, and equipment breakdowns and shortages characterised port operations. The Port of Cape Town conceded around 50 operational hours this week due to strong winds, dense fog, and equipment breakdowns, while the main operational constraints in Durban proved to be adverse weather and continuous equipment breakdowns. Operations at our Eastern Cape Ports were mainly impacted by unfavourable weather and marine equipment breakdowns, while minimal delays were reported at the Port of Richards Bay. This week, the Maersk Vilnius 502N announced that it will cut and run from the Port of Cape Town as she is required to proceed to dry dock in Shanghai with a strict deadline, which has moved forward recently. Due to adverse weather conditions, the Kalahari Express had to seek shelter in Europe for safety reasons. As a result, she will be delayed in South Africa. Additionally, the latest reports suggest a recent derailment occurred on the ConCor line. Two lines were seemingly affected, with one line already back in service and the second line to be recommissioned before the weekend.

The global shipping industry continues to navigate shifting trade policies and market volatility. The U.S. is set to implement new tariffs on imports from Canada, Mexico, and China in February 2025, exacerbating an already imbalanced container trade. Despite past tariffs, China remains the largest source of US imports, and the latest measures are unlikely to disrupt entrenched trade flows. Shippers are advised to focus on supply chain resilience and long-term planning. Schedule reliability remained volatile, with global liner performance fluctuating between **50%-55%** in 2024. December saw a slight decline to **53,8%**, while port congestion eased slightly, with **2,83 million TEU** still stuck in the system. Severe weather in the Atlantic and English Channel added to delays. Freight rates continued to decline, with global spot rates falling **↓2,4%** this week, though the Shanghai-Durban route remains elevated due to blank sailings. The widening gap between spot and contract rates underscores the importance of strategic shipping agreements. Meanwhile, a legal dispute between China United Lines and Amazon highlights growing tensions in shipper-carrier contracts.

In the air cargo space, the daily average of air cargo handled at ORTIA in the previous week amounted to **532 309 kg** inbound (**↑14%**, w/w) and **363 612 kg** outbound (**↑14%**), another significant increase on this year's initial slow start. Total international cargo for December (at all airports) decreased monthly by **↓15%** (m/m) and annually by **↓3%** (y/y) – although average levels have exceeded 2023 numbers (see *Figure 2* b). Domestically, consolidated domestic air freight volumes for our three primary airports are collectively up versus last month (**↑11%**, m/m) and similarly up versus the previous year (**↑8%**, y/y). Internationally, IATA reports a global cargo tonne-kilometre growth of **↑6,1%** (y/y), marking the 17th consecutive month of growth. The full year saw CTKs surpass 2023 levels by **↑11,3%** (y/y), setting a new record by exceeding 2021's volumes. Capacity increased by **↑3,7%** (y/y) globally, as YTD increased by **↑7,4%**. In other aviation news, the UK government has backed the long-debated Heathrow third runway and Lower Thames Crossing projects, with industry leaders emphasising their potential to enhance trade efficiency, logistics capacity, and economic growth—contingent on swift implementation.

Operations along the Lebombo Border Post and N4 Corridor have essentially returned to normal, with truck volumes stabilising at **1 425 HGVs per day** and border processing times averaging **2,5 hours** per crossing. Rail flows to Maputo have increased to seven trains daily, with Eswatini sugar trains reaching two per day. However, a derailment at KM7 in Mozambique caused a three-day disruption before recovery.

For the rest of SADC borders, the average queue times increased by approximately **three-quarters of an hour** from last week, as the transit times increased by almost **an hour**. The median border crossing times at South African borders increased by over **three hours**, averaging **~10,7 hrs** (**↑44%**, w/w) for the week. In contrast, the greater SADC region (excluding South African controlled) also increased – by around **two hours**, averaging **~5,8 hrs** (**↑44%**, w/w). On average, three SADC border posts took more than a day to cross: Beitbridge, Kasumbalesa (the worst affected, taking nearly **two days** to cross from both sides), and Katima/Mulilo. Other developments include **(1)** Groblersbrug flood update, **(2)** Oshoek border damage update, **(3)** Botswana lifts grain import ban, and **(4)** lithium tax increase in Zimbabwe.

As we approach the **State of the Nation Address** (SONA) on 6 February 2025, the logistics industry is watching closely for decisive action on port and rail reform. The **R47 billion state guarantee** to Transnet underscores the urgency of addressing systemic inefficiencies, yet bailouts remain a short-term fix without structural reform. We call for an accelerated shift from a public monopoly to an open access/concession model, unlocking private sector investment to drive efficiency, competition, and innovation. In rail, the collaborative drive to bring private sector partners on board must be urgently concluded, ensuring the process moves swiftly from theory to practical implementation. The industry cannot afford further delays in chiselling out the details that will translate reform into operational reality. At a minimum, we expect the President to outline a concrete budget for port and rail maintenance and critically answer the question: how much longer will we remain stuck in endless bidding wars instead of moving toward functional, efficient, and competitive freight 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 27 January to 2 February (measured in TEUs)

7-day flow reported (27/01/2025 – 02/02/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 304	30 126	↓5%
New Pier (Pier 1)	2 007	14 046	↑12%
Cape Town Container Terminal	1 902	13 313	↑5%
Ngqura Container Terminal	1 926	13 482	↑39%
Port Elizabeth Container Terminal	267	1 867	↓15%
Other	1 143	8 002	↑102%
Total	**11 548**	**80 836**	↑11%

Source: Calculated from TPT, 2025. Updated 02/02/2025.

An increased average of **~11 548 TEUs** (↑11%) was handled per day for the last week (*27 January to 2 February, Table 2*), compared to the projected average of **~12 123 TEUs** (↓5% actual versus projected).

For the coming week, an increased average of **~12 123 TEUs** (↑5%) is predicted to be handled (*3 to 9 February, Table 3*). Port operations were mainly impacted by inclement weather conditions, high swells, and equipment breakdowns and shortages.

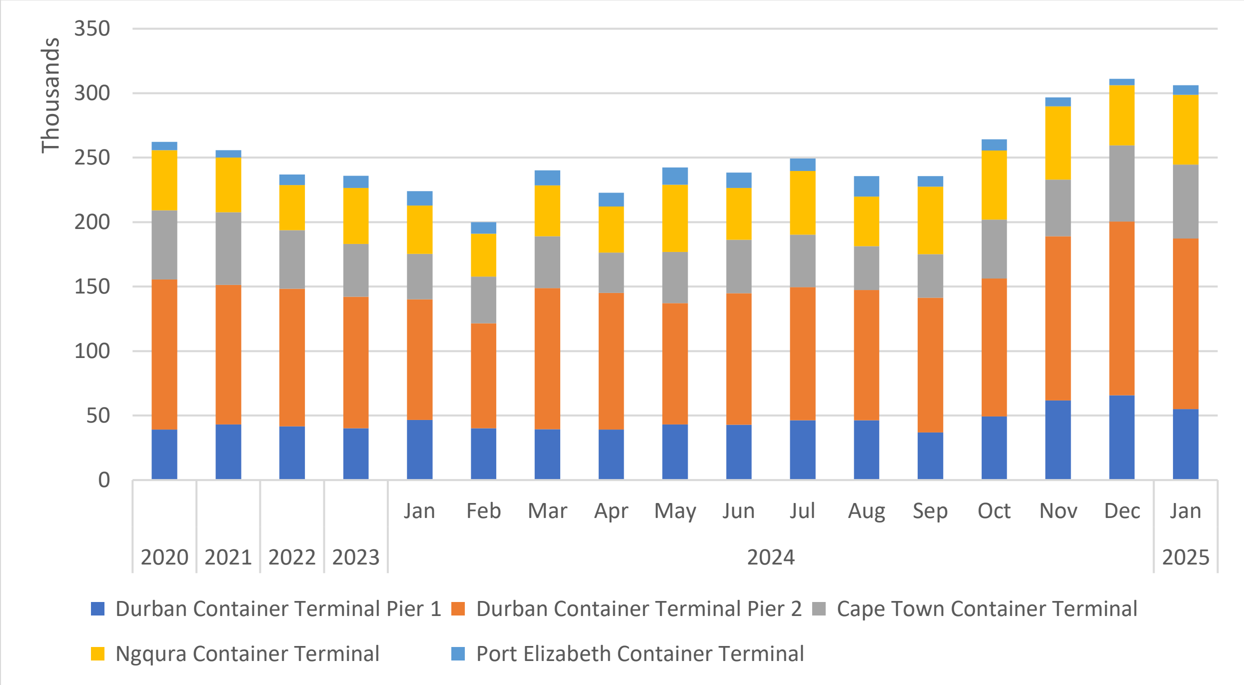
Table 3 – Container Ports – Weekly flow projected for 3 to 9 February (measured in TEUs)

7-day flow reported (03/02/2025 – 09/02/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 044	35 308	↑17%
New Pier (Pier 1)	1 859	13 012	↓7%
Cape Town Container Terminal	2 059	14 414	↑8%
Ngqura Container Terminal	2 151	15 057	↑12%
Port Elizabeth Container Terminal	178	1 246	↓33%
Other	832	5 821	↓23%
Total	**12 123**	**84 858**	↑5%

Source: Calculated from TPT, 2025. Updated 02/02/2025.

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.

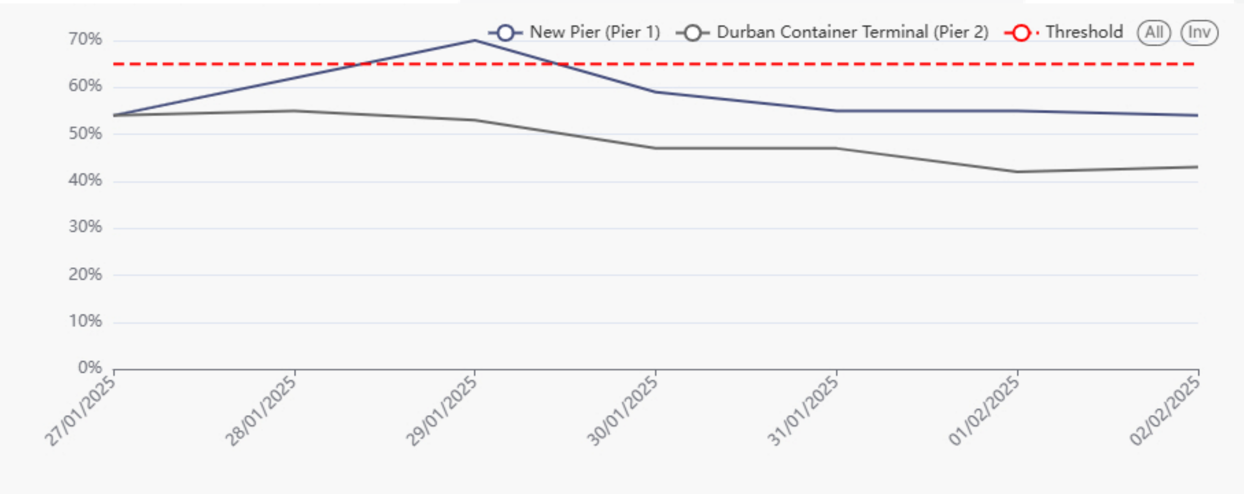
Figure 3 – Monthly flow reported for total container movement (TEUs thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 02/02/2025.

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

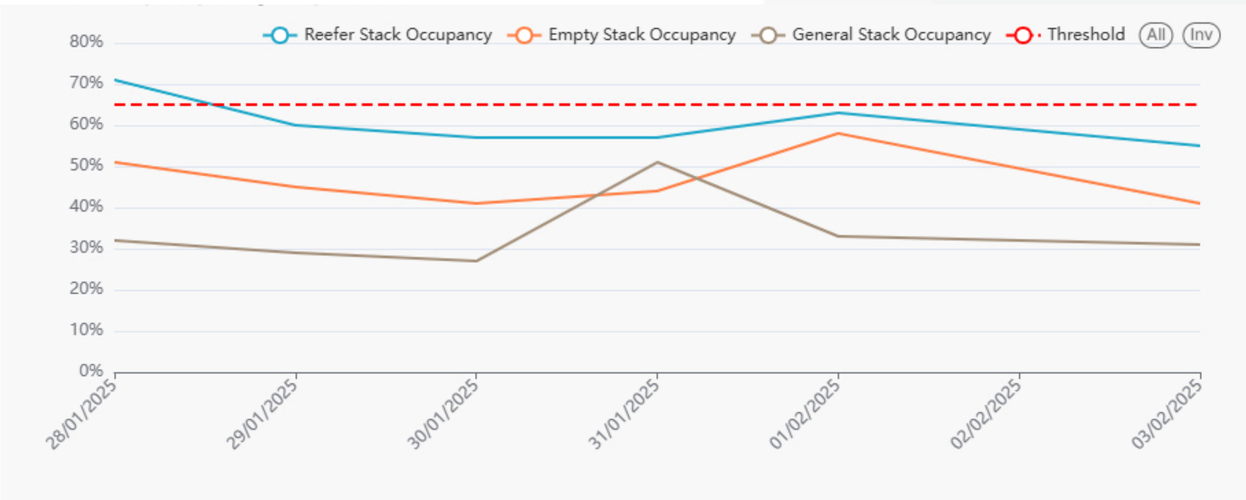
Figure 4 – Stack occupancy in DCT, general-purpose containers (27 January to present; a day on the day)



Source: Calculated using data from Transnet, 2025, and updated 02/02/2025.

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 (28 January to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 02/02/2025.

b. Summary of port operations

i. Weather and other delays

- The Port of Cape Town conceded around 50 operational hours this week due to strong winds, dense fog, and equipment breakdowns.
- The main operational constraints in Durban proved to be adverse weather and continuous equipment breakdowns.
- Operations at our Eastern Cape Ports were mainly impacted by adverse weather and marine equipment breakdowns.
- Minimal delays were reported at the Port of Richards Bay.

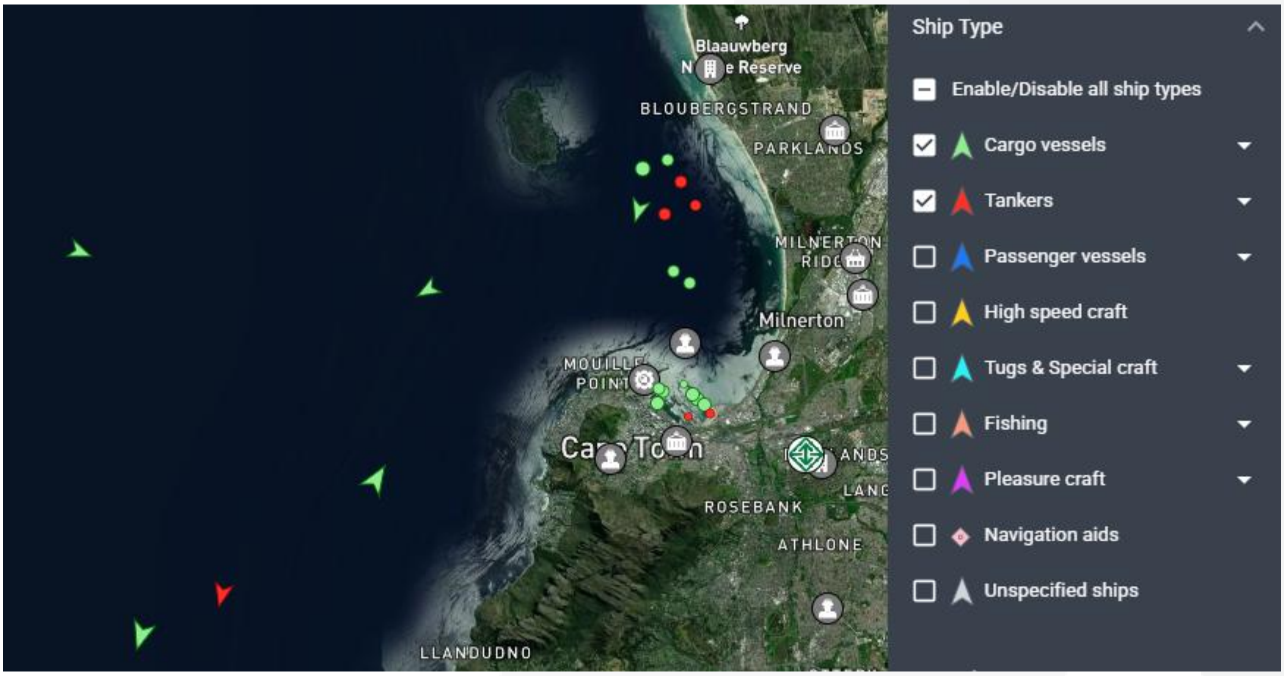
ii. Cape Town

On Friday, CTCT recorded three vessels at berth and none at anchor, with two vessels out of port limits, as strong winds, dense fog, and equipment breakdowns impacted operations. On the landside, between Monday and Friday, the terminal managed to service 3 385 trucks while handling approximately 209 rail units. On the waterside, the terminal executed approximately 4 001 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 31%**, **reefers at 57%**, and **empties at 44%**. Additionally, the terminal operated with **seven STS cranes**, **19 RTGs**, and **58 hauliers**. The latest reports suggest that Crane LC1 is expected back in service over the weekend, while LC3 is also out of commission with no ETR available yet. Towards the end of the week, the terminal operated with four straddle carriers.

This week, the Maersk Vilnius 502N announced that it will cut and run from the Port of Cape Town as she is required to proceed to dry dock in Shanghai with a strict deadline, which has moved forward recently. According to the Shipping Line, the vessel was delayed in Cape Town due to adverse weather, equipment breakdowns, and poor productivity levels, resulting in this decision. All shortshipped units will be accommodated on the MSC Juliana III 503N.

On Friday, CTMPT recorded three vessels at berth and one at outer anchorage. In the preceding 24 hours, the terminal managed to handle 377 container moves and 3 110 tons of cargo across the quay on the waterside. On the landside, 252 trucks were processed during the same period. Stack occupancy was recorded at 70% for general cargo, 95% for reefers, and 94% for empties. Towards the end of the week, the terminal operated with two cranes, with the technical team still currently busy running diagnostics on Crane 600. The latest reports suggest a technician is flying in from Germany to assist with the machine's repairs.

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



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

iii. Durban

The Port helicopter went out of commission towards the end of the week due to a staff shortage. This is somewhat concerning as many South African pilots are being "head-hunted" in the international markets, often leaving our South African ports in limbo.

On Thursday, Pier 1 recorded two vessels on berth, operated by four gangs, with one vessel at anchor. Stack occupancy was **55%** for **GP containers**. Between Monday and Friday, the terminal executed approximately 5 038 gate and 89 rail moves on the landside. The **average TTT** for the week was **~105 minutes** (**↑19%**, w/w) and an average **staging time** of **~79 minutes** (**↑88%**). Additionally, the terminal moved over 5 400 TEUs across the quay on the waterside during the same period. The terminal operated with **four STS cranes** and **ten RTGs** towards the end of the week. The terminal experienced some operational delays due to strong winds and equipment breakdowns during the week.

Pier 2 had four vessels on berth and one at anchorage on Thursday, as adverse weather and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **47%** for **GP containers**. The terminal operated with **11 gangs** and moved over 12 300 containers across the quay between Monday and Thursday on the waterside. Approximately 11 049 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~71 minutes** (**↓11%**, w/w) and a staging time of **~54 minutes** (**↓25%**). Approximately 1 485 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **44** and **51** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **54%** during this period. The most notable crane absentees towards the end of the week were Cranes 520, 522, 531 and 532. Crane 522 went out of commission again due to gantry faults but is anticipated to return to operations before the weekend. Similarly, Crane 532 is expected back before the weekend, while no ETR is available on Cranes 520 or 531.

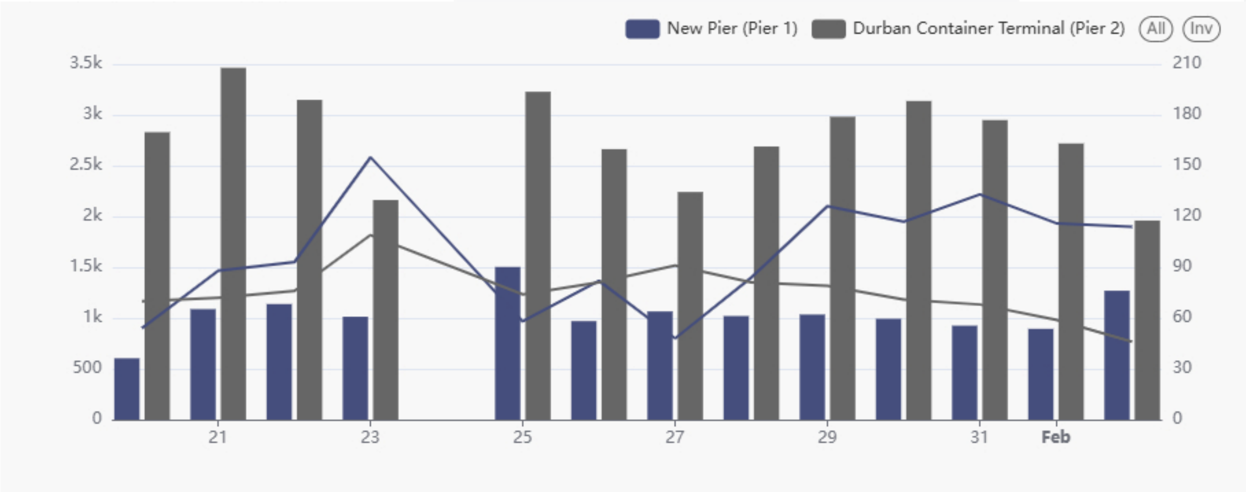
Durban's MPT terminal recorded one vessel at berth on Friday and none at outer anchorage. Stack occupancy for containers was 82%, with the breakbulk stack around 25%. In the preceding 24 hours, the terminal handled 391 containers and zero tons of breakbulk on the waterside. On the landside, 230 container trucks and 35 breakbulk RMTs were serviced. During this period, three cranes, seven reach stackers, three forklifts, and 12 ERFs were in operation. The low number of operational forklifts is due to the fact that no breakbulk vessel is currently on the berth.

On Friday, the Maydon Wharf MPT recorded zero vessels at berth or anchor. On the waterside, no volumes were handled across the quay due to no vessels on the berth. The latest reports suggest that the next vessel is scheduled to arrive around 11 February. On the landside, 13 rail wagons and 38 trucks were handled in the 24 hours before, containing approximately 1 353 tons. On Wednesday, the agri-bulk facility had one vessel on berth and zero at anchorage. Between Tuesday and Wednesday, the terminal handled 7 971 tons on the waterside, with no volumes on the landside. The next vessel destined for the Agri-bulk facility is scheduled for arrival around 20 February.

On Friday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with none at anchorage. In the 24 hours before, the terminal handled 917 road and 204 rail units on the landside while handling 2 406 units on the waterside. Overall stack occupancy was 57%, 5% at Q&R, and 5% at G-berth. During this period, the terminal had 145 high-and-heavies (abnormal loads) on hand and managed to handle 10.

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.

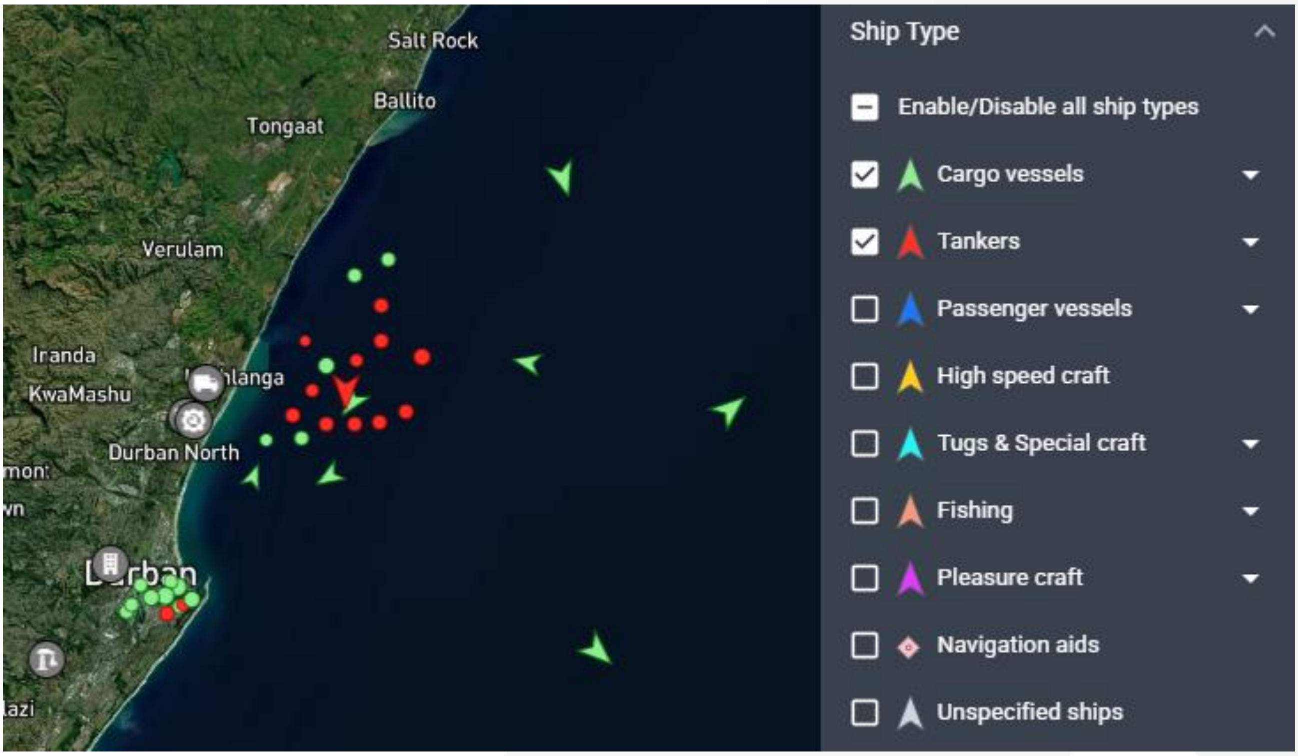
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 02/02/2025.

The queue of container vessels waiting outside Durban has slightly increased in the last week, as evident in the snapshot below. On Monday evening (3 February), **one** container vessel was waiting for Pier 1, **three** were waiting for Pier 2, and **one** was waiting for Point. Several bulk vessels remain in the queue:

Figure 8 – Durban vessel view (per vessel group)



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

iv. Richards Bay

On Thursday, Richards Bay had ten vessels at anchor and 11 on the berth, translating to three vessels at DBT, five at MPT, two at RBCT, and one at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources towards the end of the week. The daily average for the week increased significantly for the third week in a row and was around **195 000 tons** (**↓11%**, w/w). An average of **19 trains** (unchanged from last week) were serviced on the landside, slightly below the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded three vessels on berth and none 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 14% for reefers, 29% for reefer ground slots, and 22% for the general stack. During this period, the terminal handled approximately 2 771 TEUs on the waterside despite experiencing some operational delays. Approximately 481 trucks were processed on the landside at a TTT of ~26 minutes. At the start of the week, the terminal experienced some issues with the gate, which affected landside volumes that were processed during this period.

On Friday, GCT had zero vessels at berth and zero at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the preceding 24 hours. During this period, 316 trucks were processed at a TTT of ~13 minutes on the landside, while zero TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 40% for the general stack, 16% for reefers, and 34% for reefer ground slots. The terminal had one STS crane, one mobile harbour crane, and nine straddles available during this period.

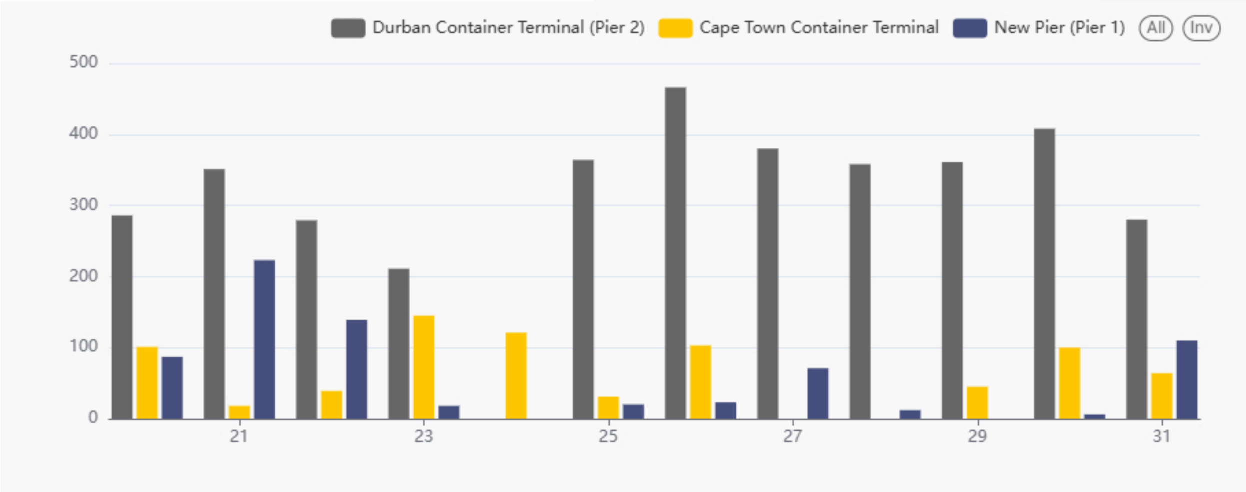
Due to adverse weather conditions, the Kalahari Express had to seek shelter in Europe for safety reasons. As a result, she will be delayed sailing into South Africa. The latest reports suggest that she is expected to arrive at the Port of Port Elizabeth on 14 February, should the weather permit.

On Tuesday, the Ro-Ro terminal recorded one berthed vessel and zero vessels at anchor. On the waterside, the terminal handled 1 968 units across the quay in the 24 hours before, resulting in a stack occupancy of 4%. The next vessel is scheduled to arrive on Monday.

vi. Transnet Freight Rail (TFR)

The latest reports suggest that a derailment occurred on the ConCor line recently. Two lines were seemingly affected, with one line already back in service and the second line to be recommissioned before the weekend. Additionally, towards the end of the week, DCT Pier 2 had 89 ConCor units on hand with a dwell time of 48 hours and 287 over-border units with a dwell time of 64 days.

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



Source: Calculated using data from Transnet, 2024. Updated 02/02/2025.

In the last week (*27 January to 2 February*), rail cargo handled out of Durban was reported at **2 757** containers, down by ↑**12%** from the previous week's **2 467** 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 20 January. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *January 2024* averaged **~675 347 kg** daily.

Table 4 – International inbound and outbound cargo from OR Tambo

Flows	20-Jan	21-Jan	22-Jan	23-Jan	24-Jan	25-Jan	26-Jan	Week
Volume inbound	239 047	354 811	371 818	172 413	341 194	276 131	1 970 751	**3 726 165**
Volume outbound	168 724	241 184	208 436	165 421	188 561	176 471	1 396 485	**2 545 282**
Total	**407 771**	**595 995**	**580 254**	**337 834**	**529 755**	**452 602**	**3 367 236**	**6 271 447**

Courtesy of ACOC. Updated: 02/02/2025.

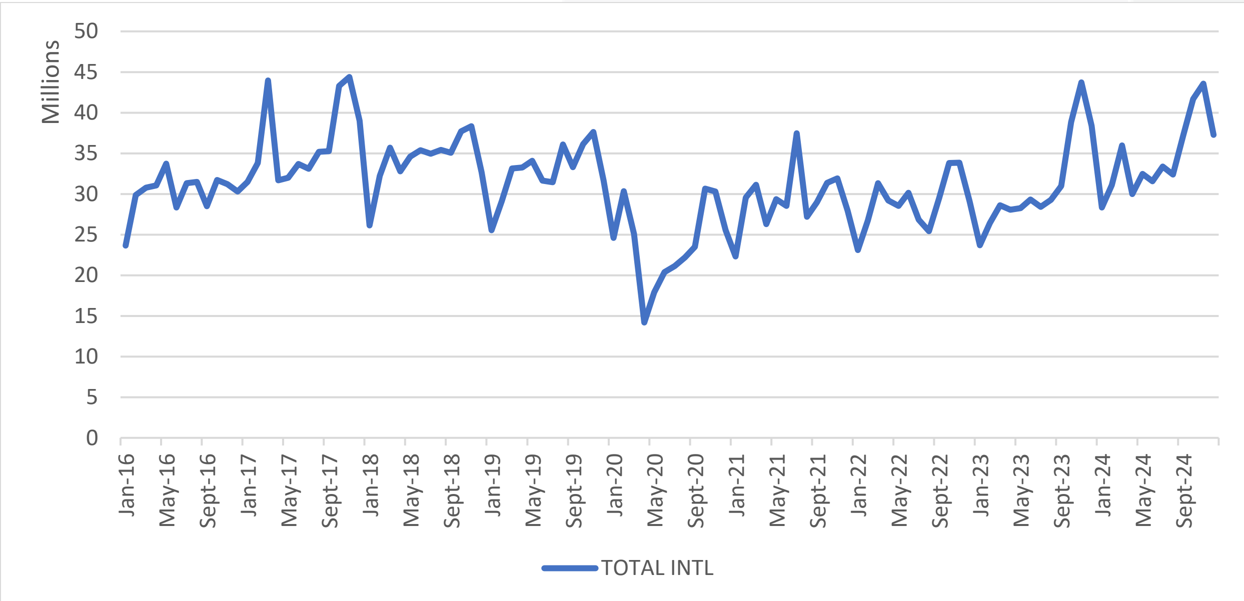
The daily average of air cargo handled at ORTIA in the previous week amounted to **532 309 kg** inbound (**↑14%**, w/w) and **363 612 kg** outbound (**↑14%**), another significant increase on this year's initial slow start. Consequently, the levels have surpassed last year's January volumes (**↑33%**, y/y) and below pre-pandemic January 2020 (**↑40%**).

Per airport, consolidated figures for December show the following movements:

- Johannesburg cargo decreased monthly by **↓13%** (m/m) and annually by **↓5%** (y/y).
- Cape Town cargo decreased monthly by **↓20%** (m/m) and annually by **↓2%** (y/y).
- Durban cargo increased monthly by **↑10%** (m/m) and increased annually by **↑76%** (y/y).
- Total international cargo decreased monthly by **↓15%** (m/m) and annually by **↓3%** (y/y).
- Lastly, year-to-date cargo shows that the industry increased by **↑11%** in 2024.

The following figure shows the air cargo flows (inbound and outbound) to and from all commercial airports since the start of 2016. There has been a sustained increase in recent months – almost reaching the records set in 2017:

Figure 10 – Total international cargo from all airports – volumes per month (kg millions)



Calculated from ACOC. Updated: 02/02/2025.

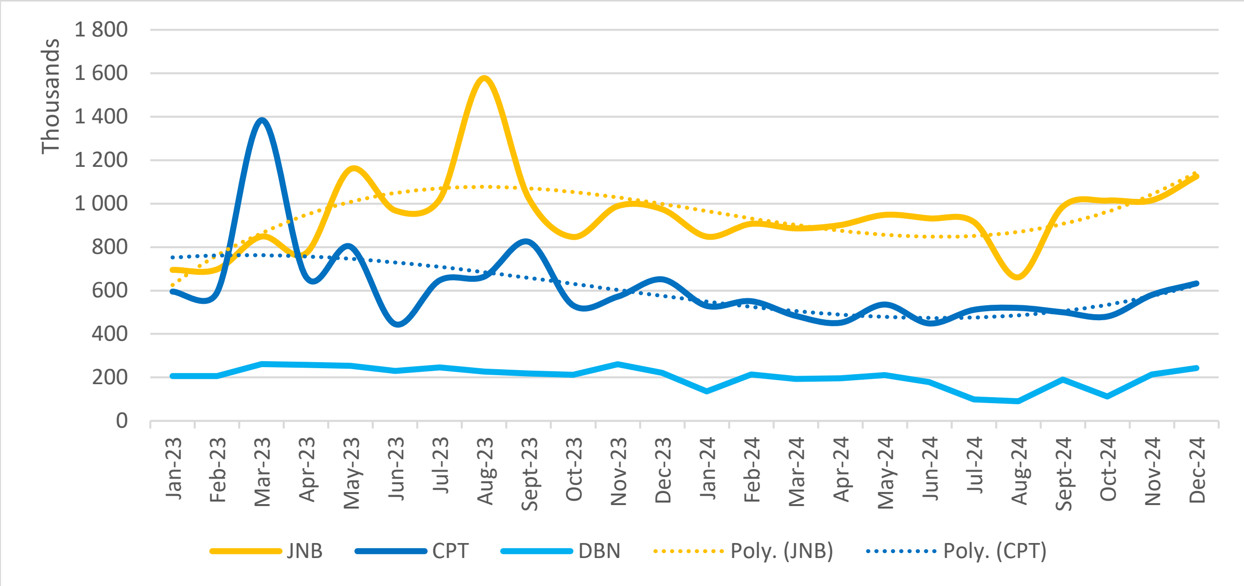
b. Domestic air cargo

The following section shows domestic air cargo movement for December. Consolidated domestic air freight volumes for our three primary airports are collectively up versus last month (**↑11%**, m/m) and similarly up versus the previous year (**↑8%**, y/y). Per airport, the following movements have been observed for December:

- Johannesburg cargo increased by **↑11%** (m/m) and increased annually by **↑16%** (y/y).
- Cape Town cargo increased monthly by **↑9%** (m/m) but decreased annually by **↓3%** (y/y).
- Durban cargo increased monthly by **↑14%** (m/m) and annually by **↑10%** (y/y).
- Lastly, year-to-date cargo shows that the industry decreased by **↓15%** in 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: 02/02/2025.

3. SARS Merchandise Trade Statistics: December

SARS released its latest "*Merchandise Trade Statistics*" for December[6], showing a preliminary monthly trade surplus of **R15,5 billion**. Monthly trade indicates that exports decreased by **↓11,2%** from November (m/m) to **R160 billion**, while imports decreased by **↓1,1%** (m/m) to **R144,6 billion**. The YTD figures reveal a trade surplus of **R196,1 billion**, substantially improving from the **R130,0 billion** surplus recorded in 2023. Annually, export flows for December 2024 were **↓3,3%** (y/y) lower than in December 2023, while import flows were also lower by **↓1,3%**.

Regionally, trade with BELN countries for December resulted in a trade surplus of **R10,3 billion**, derived from exports of **R15,6 billion** and imports of **R5,3 billion**. Exports to our neighbouring countries decreased by **↑24,6%** (m/m) between November and December, while imports declined by **↓15,0%** (m/m) over the same period. Cumulative figures for the year demonstrate a notable positive trade balance with BELN countries, increasing from **R129,1 billion** in 2023 to a surplus of **R138,5 billion** in 2024. When excluding BELN countries, South Africa's trade balance with all other trading partners is a net surplus of **R57,6 billion** YTD.

4. Road and Regional Update

a. Lebombo border post update

As of the week spanning January 27 to February 2, 2025, very few reported disruptions or blockages affecting operations and cargo flows at the Lebombo Border Post and along the N4 Corridor between South Africa and Mozambique. The following notes summarise the recent developments:

- Truck volumes are close to normal at **1 425 HGVs per day**, with no substantial queue and an average border time of around **2,5 hours** per crossing for the week.

[6] SARS. 31/01/2025. Trade Statistics: December 2024.

- Rail to Maputo has increased **to seven trains a day** on average in the last week
- Sugar trains from Eswatini have also increased to around **two trains a day**
- There was, however, a derailment from KM7 in Mozambique that disrupted the flow for three days.

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 (including critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Empty Minerals	Total Trucks inside KM4 *staging	Total Trains	SA to Maputo	KM4 - to Maputo	Eswatini to Maputo
Design Capacity	**1 500**	**1 500**	**1 200**	**200**	n/a	**50**	**50**	No delays	**2 000**	**20**	**10**	**6**	**4**
27-Jan-25	1 217	1 236	994	98	16	114	14	No delays	143	**11**	10	0	1
28-Jan-25	1 376	1 193	901	158	22	89	23	No delays	245	**7**	5	1	1
29-Jan-25	1 576	1 476	1 022	291	49	81	33	No delays	284	**8**	6	0	2
30-Jan-25	1 203	1 165	691	268	54	82	70	No delays	206	**13**	9	1	3
31-Jan-25	1 253	1 172	718	263	47	78	66	No delays	261	**11**	10	0	1
01-Feb-25	1 475	1 313	880	237	57	88	51	No delays	377	**6**	5	0	1
02-Feb-25	1 409	1 211	828	206	61	79	37	No delays	229	**6**	4	0	2
% of design capacity	94%	81%	69%	103%	n/a	158%	74%	n/a	11%	30%	40%	0%	50%
% deviation from prev. 24 hours	-4%	-8%	-6%	-13%	7%	-10%	-27%	n/a	-39%	0%	-20%	n/a	100%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 02/02/2025.

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 02/02/2025 at 14:00.

b. SADC cross-border and road freight delays

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

- The median border crossing times at South African borders increased by over **three hours**, averaging **~10,7 hrs** (**↑44%**, w/w) for the week.
- In contrast, the greater SADC region (excluding South African controlled) also increased – by around **two hours**, averaging **~5,8 hrs** (**↑44%**, w/w).

1. **Flood disruptions and border closures:**
    - Groblersbrug border closed on 14 January due to flooding.
    - Operations have been restored; however, pre-dated documents were accepted at Northwest Botswana borders during closure, but new declarations must now match the correct port.
2. **Oshoek border incident (South Africa - Eswatini):**
    - After a truck with brake failure crashed into the border last week, there was extensive damage to buildings and vehicles.
    - Three people were injured, but fortunately, there were no fatalities.
    - Operations were temporarily suspended for assessment but resumed late Monday afternoon.
3. **Botswana lifts grain import ban:**
    - The ban on grain imports was lifted after it was confirmed that GOSS'S Wilt of Maize is spread by maise, not grain.
    - Import permits issued before 16 January remain cancelled.
    - Future maise seed imports will be subject to revised conditions.
    - Results of the BUD ROT investigation are still pending.
4. **Efficiency Improvements at Nacala Port:**
    - New dual-directional drive-through portal scanners installed.
    - Scanning time reduced to eight seconds per truck.
    - Maximum permitted speed through scanners: 15 km/h.
    - Expected to enhance efficiency and reduce delays.
5. **Deteriorating road conditions (Zimbabwe):**
    - Ngundu-Masvingo road condition worsening despite Road User Charge.
    - Many drivers divert to an alternative route, adding 97 km to their trips.
6. **Lithium export tax hike (Zimbabwe):**
    - Export tax increased from 1% to 2% as of 1 January 2025.
    - No official statutory instrument has yet been issued to formalise the change.
    - ZIMRA officers enforcing the tax and withholding trucks until payment is made.
    - Situation under ongoing monitoring.

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

Table 6 – Delays[7] summary – South African borders (both directions)

Border Post	Direction	HGV[8] 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	481	29,4	5,2	29,0	14 430	3 367
Beitbridge	Zimbabwe-SA	377	9,1	1,6	9,1	11 310	2 639
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	269	12,7	1,3	12,4	8 070	269
Tlokweng	Botswana-SA	168	1,3	0,2	1,2	5 040	1 176
Vioolsdrift	SA-Namibia	30	4,9	1,3	4,0	900	210
Noordoewer	Namibia-SA	20	1,9	0,4	1,5	600	140
Nakop	SA-Namibia	30	3,7	0,3	3,4	900	210
Ariamsvlei	Namibia-SA	20	1,0	0,4	1,1	600	140
Skilpadshek	SA-Botswana	286	23,8	4,2	23,5	8 580	2 002
Pioneer Gate	Botswana-SA	123	2,2	1,2	2,1	3 690	861
Lebombo	SA-Mozambique	1 425	2,8	0,3	2,5	42 750	9 975
Ressano Garcia	Mozambique-SA	847	1,4	0,2	1,3	25 410	5 929
Sum/Average		**4 076**	**6,7**	**1,2**	**6,5**	**122 280**	**28 532**

Source: TLC, FESARTA, & Crickmay, week ending 26/01/2025.

Table 7 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	12,6	2,6	12,3	4 800	2 240
Central Corridor	798	2,0	0,1	2,0	2 394	5 586
Dar Es Salaam Corridor	1 819	10,9	0,9	10,8	9 095	12 733
Maputo Corridor	1 748	2,1	0,3	1,9	26 220	12 236
Nacala Corridor	127	0,0	0,0	0,0	953	889
North/South Corridor	3 367	9,8	2,6	10,4	5 612	23 569
Northern Corridor	2 817	1,3	0,1	1,2	6 609	21 588
Trans Caprivi Corridor	116	36,0	2,3	35,5	1 740	812
Trans Cunene Corridor	100	0,0	0,0	0,0	1 500	700
Trans Kalahari Corridor	439	7,5	1,6	7,4	3 293	3 073
Trans Oranje Corridor	100	2,9	0,6	2,5	750	700
Sum/Average	**11 751**	**6,2**	**1,1**	**6,3**	**5 302**	**84 126**

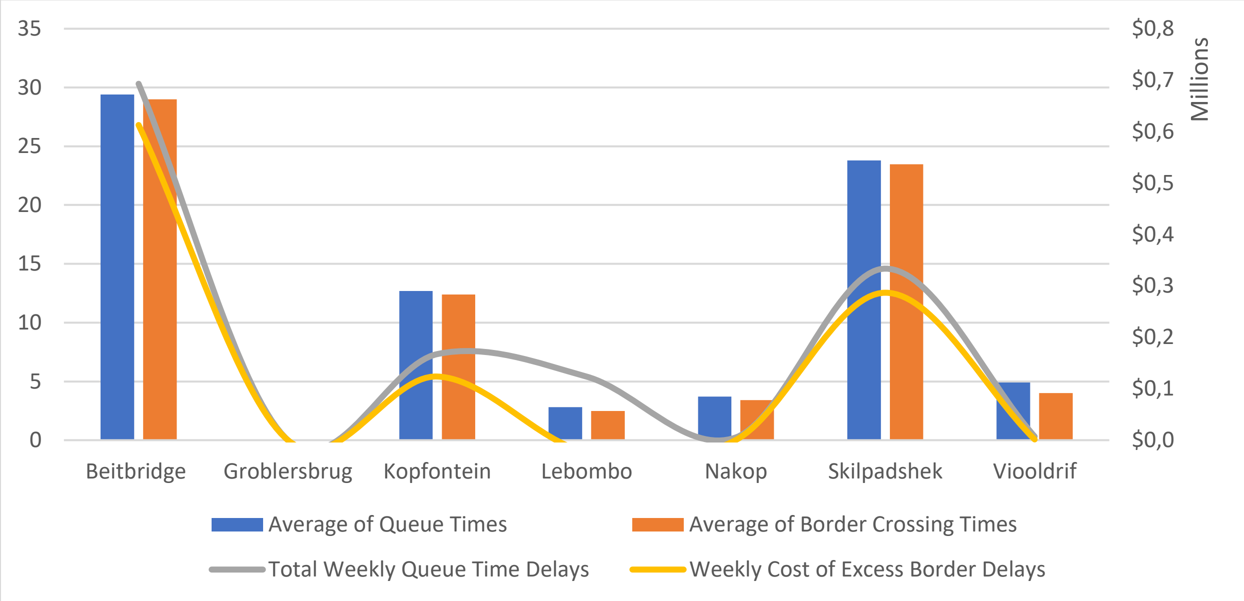
Source: TLC, FESARTA, & Crickmay, week ending 26/01/2025.

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

[7] Delays are variable and stem from multiple causes, including poor infrastructure, congestion, and lack of stakeholder coordination, with limited border process transparency. Data comes from LMS (Crickmay and SAAFF). Stakeholders should report issues via the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.

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

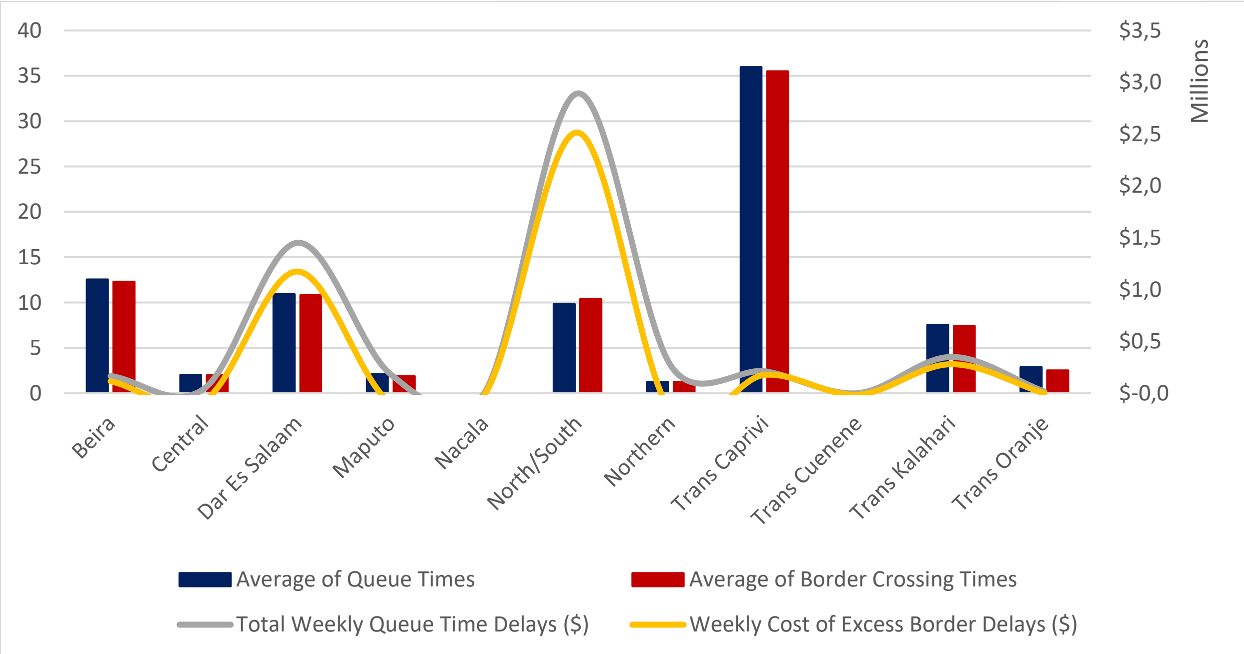
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 26/01/2025.

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 26/01/2025.

In summary, cross-border queue time averaged **~6,2 hours** (up by **~0,7 hours** from the previous week's **~5,5 hours**), indirectly costing the transport industry an estimated **$5,7 million** (**R103 million**). Furthermore, the week's average cross-border transit times hovered around **~6,3 hours** (up by **~0,9 hours** from the **~5,4 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,9 million** (**R71 million**). As a result, the total indirect cost for the week amounts to an estimated **~$9,5 million** (**R174 million**, up by **~R29 million** or **↑20%** from **~R145 million** in the previous report).

5. International Update

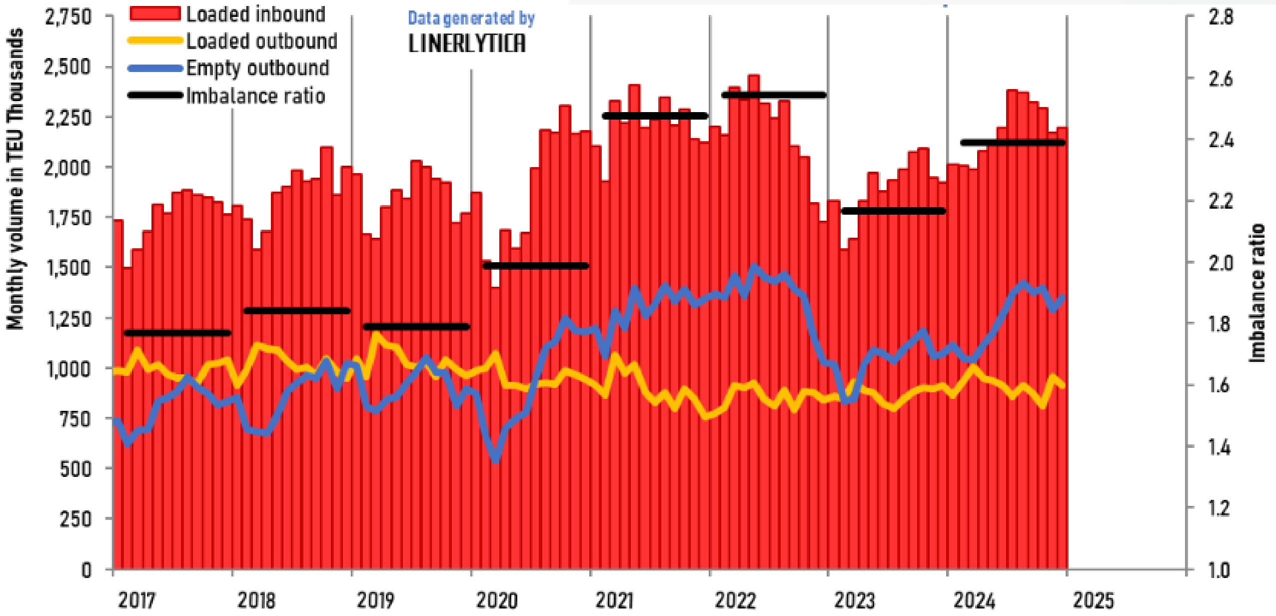
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry and **(b)** the global aviation industry.

a. Global shipping industry

i. Proposed US tariffs and their impact on US shipping

The United States is set to implement **25% tariffs** on imports from Canada and Mexico and an additional **10%** on imports from China, effective February 4, 2025.[9] These measures are anticipated to exacerbate the existing container trade imbalance, as US imports have consistently outpaced exports, with a **2,4:1 ratio** in 2024 compared to a **1,8:1 ratio** in 2017. China remains the predominant source of US imports, accounting for **41%** of total containerised imports in 2024, despite the imposition of previous tariffs. The new tariffs are unlikely to significantly alter this dynamic, given the entrenched nature of these trade patterns. The following chart shows the potential worsening of the trade balance for US ports:

Figure 15 – Top 10 US ports monthly container volumes (2017-2024)



Source: Linerlytica

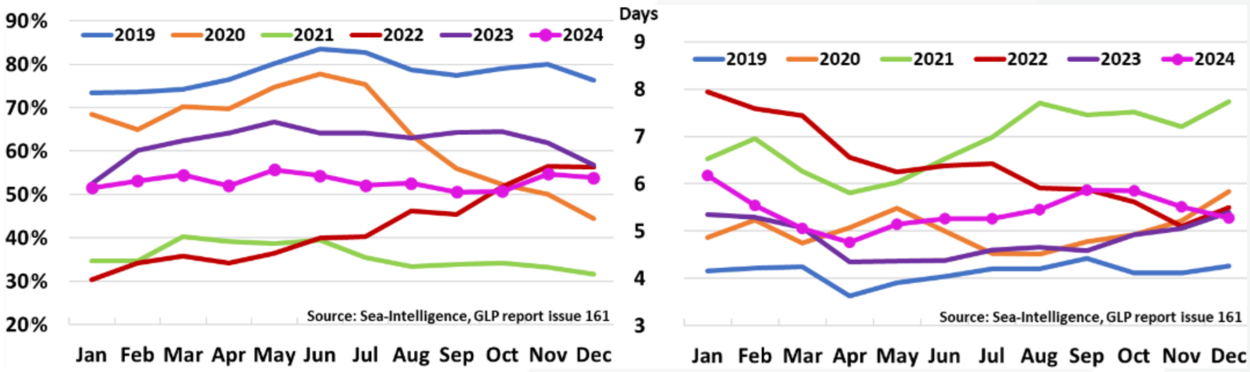
In light of the proposed US tariffs, shippers are advised to adopt a strategic and flexible approach to navigate volatility, considering options such as product adjustments, supply chain rebalancing, and exploring untapped markets. Analysts advise investing in operational resilience and avoiding hasty decisions, as the tariff landscape remains uncertain. Agility and long-term planning will be key to maintaining competitiveness amid ongoing trade disruptions.[10]

[9] Linerlytica. 03/02/2025. Market Pulse 2025 Week 05.
[10] Lennane, A. 29/01/2025. Shippers should 'think differently' about tariffs, say analysts.

ii. Global schedule reliably and container industry summary

According to *Sea-Intelligence's* Global Liner Performance (GLP) report, global schedule reliability remained relatively stable throughout 2024, fluctuating within the **50%-55% range**.[11] In December 2024, reliability decreased by **↓0,9%** (m/m) to **53,8%**, marking a **↓3,0%** decline compared to December 2023. The average delay for late vessel arrivals improved, decreasing by **0,23 days** to **5,28 days**—the lowest since July 2024. Among the top 13 carriers, Maersk achieved the highest schedule reliability at **60,4%**, while Wan Hai recorded the lowest at **47,9%**.

Figure 16 – Global Schedule Reliability (%) and Global Average Delays for Late Vessel Arrivals (days)



Source: *Sea Intelligence*

Scheduling remains volatile, as Drewry's "*Cancelled Sailings Tracker*" registered a high **14% cancellation rate** of Pro-forma scheduling (3 February to 9 March).[12]

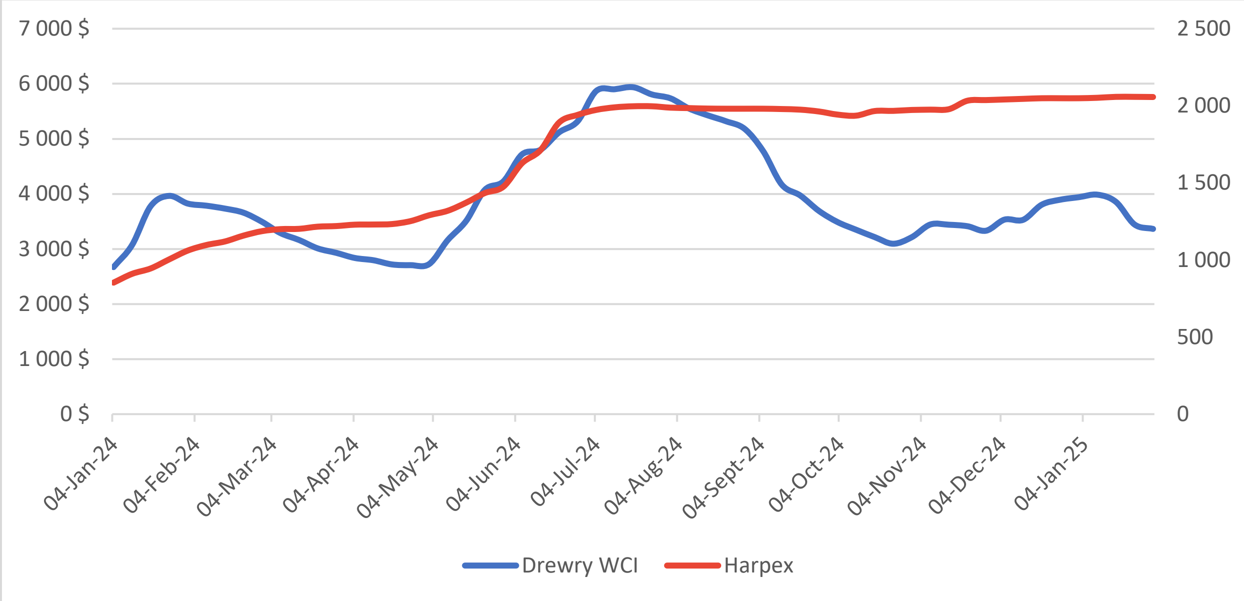
Port congestion slightly eased this week, as some **2,83 million TEU** (around **9% of the global fleet**) is stuck in the system – down from **3,3 million** last week. The Lunar New Year holidays (notwithstanding the tariff threats) have had their effect. Congestion was concentrated in China, with some severe weather on the US Atlantic coast and the English Channel, further impacting the flow.[13] However, the excess container capacity is likely to curtail any further worsening.

iii. Global freight and contract rates

Global container spot rates have decreased again this week, as rates dropped by **↓2,4%** this week to **$3 364 per 40-ft container**[14], according to Drewry's "*World Container Index*". Spot rates are **↓12%** less than this time last year (but still **↑137%** above the average pre-pandemic level of **$1 420** in 2019. Despite the global decline in container spot rates, rates on the Shanghai-Durban route remain elevated at **$6 810/40-ft** according to the SCFI due to limited capacity from blank sailings and carriers prioritising European destinations, keeping Asian export rates at a premium. Nevertheless, an ongoing recession in rates should be expected, as South Africa typically trends behind the market by a month or two. Meanwhile, charter rates have remained stable (but still elevated), as the *Harper Petersen Index* (Harpex) traded around **2 057 points** (**↑94%**, y/y) on Friday. The following illustration shows the respective changes in the previous 12 months:

[11] Murphy, A. 28/01/2025. 2024 schedule reliability largely within 50%-55%.
[12] Drewry. 31/01/2024. Cancelled Sailings Tracker.
[13] Koo, A. 28/01/2025. Chinese New Year rush and threat of tariffs leaves box ports congested.
[14] Drewry. 30/01/2025. World Container Index.

Figure 17 – World Container Index ($ per 40ft, index) & Harpex Charter Index



Source: Calculated from Drewry and Harpex

Recent analyses indicate a widening gap between spot and contract rates in both air and ocean freight sectors.[15] The robustness of the charter market has played its part. In air cargo, the volatility of spot rates has led forwarders to increasingly favour long-term contracts, with e-commerce giants like Alibaba and Shein securing dedicated freighter capacity to ensure supply chain stability. Conversely, in ocean shipping, the Asia-Europe contract season faces delays as stakeholders await clarity on Red Sea transit conditions, contributing to market uncertainty.[16] This divergence underscores the strategic importance for shippers to carefully assess their reliance on spot versus contract rates, balancing flexibility with the need for predictability in their logistics planning. Interestingly, while the Red Sea crisis has contributed to increased shipping costs due to longer routes around the Cape of Good Hope, other factors, such as rising fuel prices, labour shortages, and higher insurance premiums, also play significant roles. Despite the surge in maritime traffic around South Africa, the local shipping industry has not fully capitalised on this opportunity, potentially missing out on increased business.[17]

Lastly, in related financial news, China United Lines has filed a record **$96 million** compensation claim against Amazon with the US Federal Maritime Commission (FMC), citing wrongful contract termination and failure to meet minimum quantity commitments.[18] This unprecedented case highlights the growing legal and financial stakes in shipper-carrier disputes, reinforcing the importance of regulatory oversight in contractual enforcement.

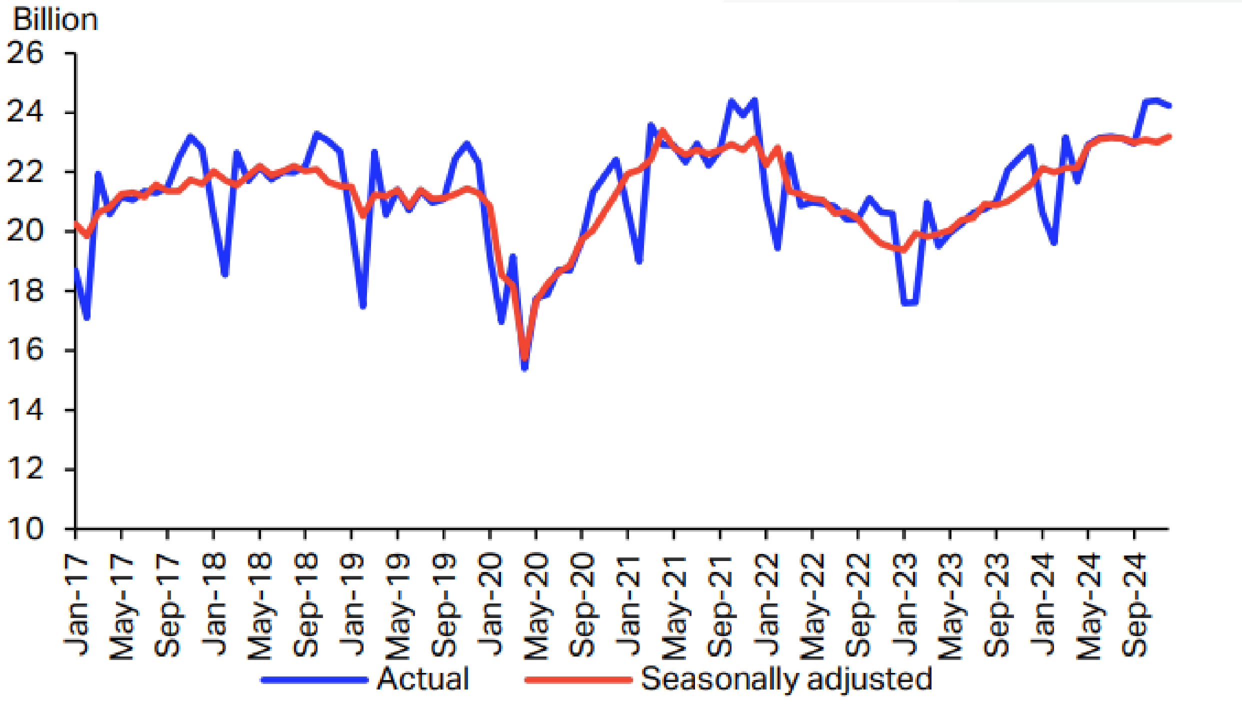
b. Global air cargo industry

IATA released their latest "*Air Cargo Market Analysis*" for December, indicating that global cargo tonne-kilometres (CTK) grew by **↑6,1%** (y/y), marking the 17th consecutive month of growth. The full year saw CTKs surpass 2023 levels by **↑11,3%** (y/y), setting a new record by exceeding 2021's volumes. Moreover, the growth was consistent across the world, as all regions and trade lanes saw growth averaging over **↑5%** for

[15] Goldstone, C. 30/01/2025. Spot vs contract gap widens as air shippers get wise to capacity limits.
[16] Whiteman, A. 30/01/2025. Contract season in limbo as carriers eye conditions for a Red Sea return.
[17] Drewry. 27/01/2025. The Red Sea crisis – not the sole reason for higher ship operating costs.
[18] Whiteman, A. 27/01/2025. Amazon hit with record compensation claim by China United Lines.

the full 2024. Despite the significant yearly increases, December volume was only up by **↑0,9%** (m/m). The record highs can be seen in the following figure:

Figure 18 – Global air cargo industry CTK (billions)



Source: IATA

Capacity increased by **↑3,7%** (y/y) globally, as YTD increased by **↑7,4%**. The average cargo load factor (CLF) for the year ended **45,9%**. Concerning cargo carrier type, the full-year 2024 breakdown shows passenger belly capacity at **54,8%**, with freighters at **45,2%**, compared to **52,5%** and **47,5%**, respectively, in 2023, noting the growth of the passenger market. Jet fuel – the largest aviation cost component – dropped in annual terms for the sixth consecutive month and is down by **↓14,9%** (y/y), while global air cargo yield continued its upward trend, increasing by **↑6,6%** for the seventh consecutive month.

In the high-frequency metrics, World ACD reports that global air cargo rates rose by **↑4%** in the final week before the Lunar New Year to **$2,52 per kilogram**, marking an **↑11%** year-on-year increase. Tonnages remained stable week-on-week (**↑1%**) after strong recoveries in weeks two and three but were still **↓7%** below December's average, suggesting more limited year-on-year growth in 2025. As reported by IATA above, it appears as though the air cargo market has slightly cooled this year compared to the records posted last year. The following shows the summary starting from January:

Figure 19 – Capacity, weight and rates by region (last 2 to 5 weeks, % change)

Origin Regions last 2 to 5 weeks	Capacity[1]			Chargeable weight[1]			Rate[1]		
WORLD ACD	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		+4%	+5%		+12%	-4%		+3%	+9%
Asia Pacific		+8%	+7%		+22%	+7%		-0%	+12%
C. & S. America		+15%	+3%		+35%	+1%		+1%	-3%
Europe		+5%	-0%		+42%	-3%		-1%	-1%
M. East & S. Asia		+2%	-1%		+3%	-2%		-1%	+32%
North America		+4%	+2%		+26%	+6%		-0%	-2%
Worldwide		**+6%**	**+2%**		**+25%**	**+3%**		**-1%**	**+9%**

Source: *World ACD*

Elsewhere, the UK government has officially backed the long-debated plans for a third runway at Heathrow Airport and the Lower Thames Crossing, with supply chain leaders expressing strong support for these infrastructure projects.[19] Industry leaders, including FedEx and BIFA, emphasised the need for cargo expansion at Heathrow to enhance trade efficiency, while Logistics UK highlighted the urgency of investment in logistics infrastructure to counteract declining competitiveness. The chancellor assured that private funding would cover transport costs and that environmental considerations would be met, while industry representatives stressed the need for swift implementation to unlock economic growth and trade potential.

ENDS[20]

[19] Whiteman, A. 29/01/2025. Logistics cheers as third runway for Heathrow gets green light at last.

[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 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.*