

Cargo Movement Update #226¹

Date: 23 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) | 37 782 | 43 045 | 80 827 | 30 144 | 34 343 | 64 487 | ↑25% |
| Air Cargo (tons) | 4 095 | 2 747 | 6 842 | 4 399 | 2 704 | 7 103 | ↓4% |

Monthly Snapshot

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

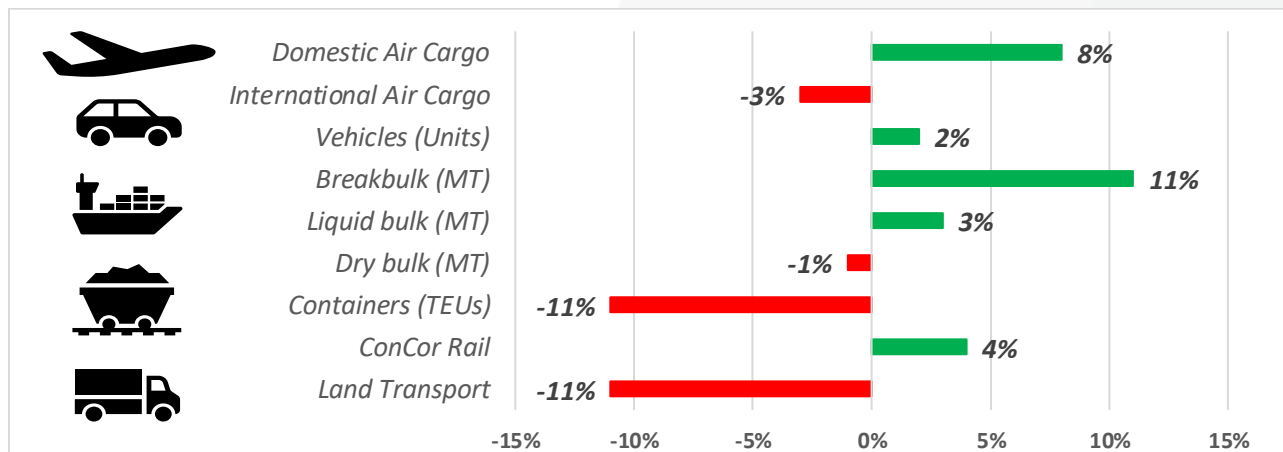
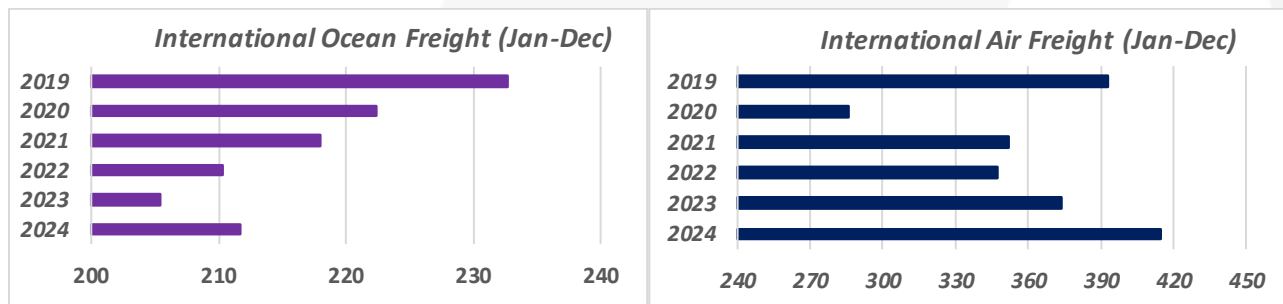


Figure 2 – Year-to-date flows 2019-2024⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An improved average of ~11 547 TEUs was handled per day, with ~11 381 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 2 842 containers, up **↑1%** from last week.
- Truck volumes through Lebombo decreased to 1 480 HGVs/day (**↓2%**), with average crossing times 4,3 hrs.
- Cross-border queue: **↓0,7 hrs**; transit: **no change**; SA borders: **11,0 hrs (↑34%)**; SADC: **5,2 hrs (↑18%)**.
- Global trade reached **\$33 trillion (↑3,7%)** in 2024, driven by developing economies and services trade.
- Global spot rates: **\$2 264/40' (↓4,4%, w/w)**; **SCFI to Durban: \$4 400/40'**, with charter rates **↑71% (y/y)**.
- Global air cargo tonnages in week 11 (10–16 Mar) are up **↑1% (w/w) & ↑3% (y/y)**, as rates @ **\$2,37/kg**.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 226th 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 **11 547 TEUs** was handled per day, representing a significant increase from **9 212 TEUs** the previous week. Port operations were mainly characterised by inclement weather, vacant berths, as well as equipment breakdowns and shortages. The Port of Cape Town lost more than 30 operational hours this week to adverse weather, while the main operational constraints in Durban proved to be adverse weather and continuous equipment breakdowns. Inclement weather conditions and vacant berths mainly impacted operations at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. Towards the end of the week, an incident involving Crane LC1 at CTCT resulted in a container being dislodged from one of the vessels. The latest reports from Maersk indicate that the Santa Rita/250N will skip the Port of Cape Town, while the Maersk Cubango 510E will bypass Coega. The main operational challenge on the rail network this week was the floods that occurred in and around Durban. The extent of the challenges, however, remained undisclosed.

Global container port throughput rose markedly in January, with Drewry's index up **↑3%** (m/m) and **↑8,3%** (y/y), signalling a rebound in trade volumes (which is further illustrated by UNCTAD this week). However, global capacity remains tight, as Red Sea diversions have removed **~10%** of available TEU capacity, increasing TEU-miles by **↑12%**. Ultra-large container ships are set to dominate fleet capacity by the end of 2025, driven by consolidation and high-volume route strategies. Despite seasonal slack, demand for vessel space remains robust, with idle capacity at less than **1%**. However, port congestion continues to absorb **~9,2% of global fleet capacity**. Carriers have shown little appetite for curbing market share to support rates, as cancellations were mainly driven by congestion. On the financial front, major shipping lines recorded a combined EBIT of **\$27,3 billion** in 2024, with total industry earnings estimated at **\$60 billion**—above pre-pandemic levels but well below pandemic-era highs. Other developments of note include **(1)** the Chinese Government criticises CK Hutchison's agreement to sell 80% of its holdings, and **(2)** the FMC is empowered to investigate international 'shipping chokepoints'.

The daily average of air cargo handled at ORTIA in the previous week amounted to **584 936 kg** inbound (**↓7%**, w/w) and **392 466 kg** outbound (**↑2%**). The current trends indicate that volumes are about **↑9%** (y/y) above the average levels of 2024 and a significant **↑25%** above the same pre-pandemic levels of 2020. Internationally, air cargo rates and demand edged slightly upward in the second full week of March, with the Middle East and South Asia (MESA) the only major origin region registering a decline in tonnages. Other aviation developments of note include **(1)** fire-ravaged Heathrow experiencing major delays, **(2)** the US CBP witnessing a **90% decrease** in revenue coinciding with the three-day suspension of the de minimis exemption, and **(3)** CMA CGM Air Cargo submitting a bid to acquire Air Belgium's cargo operations.

Cargo flows across the Lebombo Border Post and N4 Corridor have decreased slightly this week, with truck volumes at **1 480 HGVs per day** (**↓2%**, w/w). There was **4,4 hours'** worth of queuing time at the border, as the average processing time hovered around **4,3 hours** per crossing. Rail to Maputo was stable at an average of **seven trains a day** in the last week, as sugar trains from Eswatini decreased slightly to around **1,5 trains a day**.

For the rest of the SADC borders, the average queue times decreased by around a **quarter of an hour** from last week, as the transit times **remained the same on average**. The median border crossing times at South African borders increased by nearly **three hours**, averaging **~11,0 hrs** (**↑34%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) also increased, by almost an hour, averaging **~5,2 hrs** (**↑18%**). On average, five SADC borders took more than a day to cross last week, including Beitbridge,

Chirundu OSBP, Kasumbalesa (the worst affected, with an average of nearly **two days** from the **Zambia side**), Katima/Mulilo, and Skilpadshok. Other developments include **(1)** Groblersbrug border post to reopen, **(2)** security alert – Kopfontein route, **(3)** driver fines at Beitbridge and **(4)** transit fuel duty in Zimbabwe.

In concluding this edition, this week marked a critical development in the reform of South Africa's freight logistics system with the launch of the *Request for Information* (RFI) process for Private Sector Participation (PSP). The RFI invites expressions of interest in three strategic corridor projects: **(1)** the Northern Cape to Saldanha and Nelson Mandela Bay bulk mineral corridors, focused on iron ore and manganese exports; **(2)** the Limpopo and Mpumalanga to Richards Bay corridor, covering coal, chrome, and magnetite exports; and **(3)** the Intermodal Supply Chain project, targeting container and automotive logistics across key port-city connections. These initiatives represent a necessary evolution in our logistics network—unlocking investment, enhancing operational efficiency, and setting the stage for a globally competitive, integrated, and resilient freight system. With freight demand remaining high, South Africa must ensure that these corridors operate at full capacity, as their efficient functioning is a primary enabler of trade and a critical driver of inclusive economic growth and development.

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1. Ports Update

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

a. Container flow overview

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

Table 2 – Container Ports – Weekly flow reported for 17 to 23 March (measured in TEUs)

| 7-day flow reported (17/03/2025 – 23/03/2025) | | | |
|---|---------------|---------------|-------------|
| Terminal | Daily average | Weekly total | % (w/w) |
| Durban Container Terminal (Pier 2) | 4 182 | 29 277 | ↓4% |
| New Pier (Pier 1) | 1 713 | 11 990 | ↓5% |
| Cape Town Container Terminal | 2 202 | 15 417 | ↑108% |
| Ngqura Container Terminal | 2 542 | 17 791 | ↑162% |
| Port Elizabeth Container Terminal | 361 | 2 524 | ↑242% |
| Other | 547 | 3 828 | ↓41% |
| Total | 11 547 | 80 827 | ↑25% |

Source: Calculated from TPT, 2025. Updated 23/03/2025.

A much improved average of ~**11 547 TEUs (↑25%)** was handled per day for the last week (17 to 23 March, Table 2), slightly above the projected average of ~**11 381 TEUs (↑1% actual versus projected)**. The rebound in volume after last week's low numbers has been welcomed.

For the coming week, a decreased average of ~**11 381 TEUs (↓1%)** is predicted to be handled (24 to 30 March, Table 3). Port operations were mainly characterised by inclement weather, vacant berths, as well as equipment breakdowns and shortages.

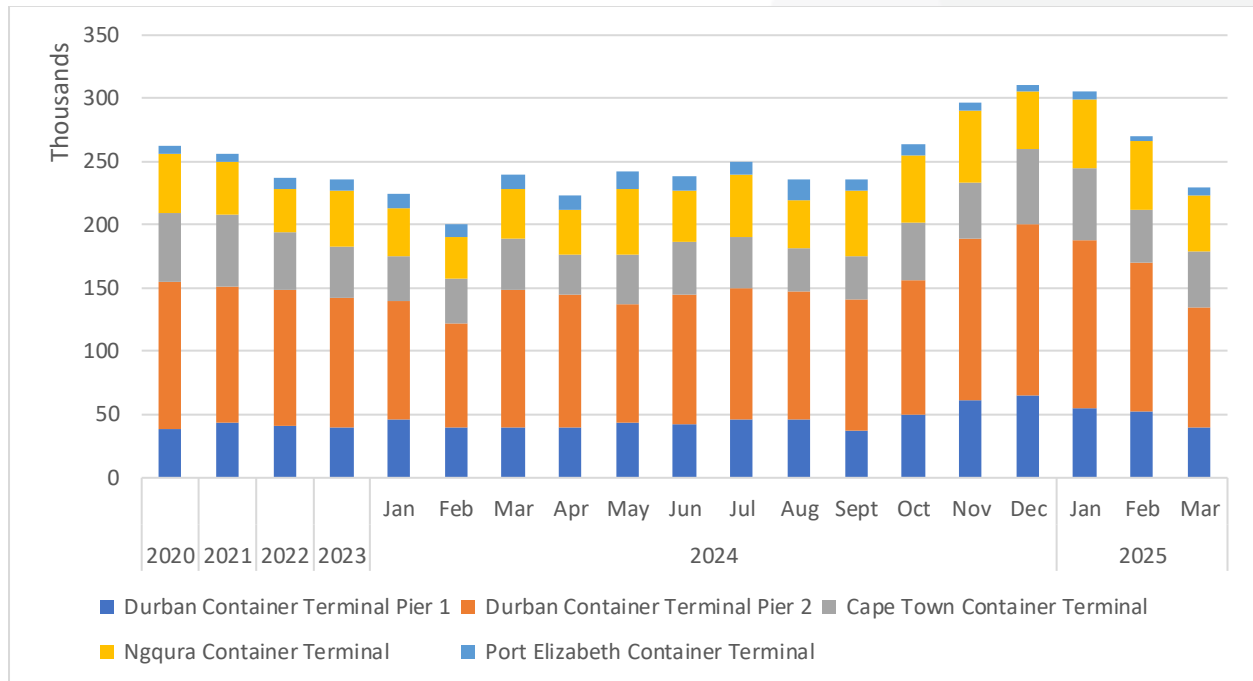
Table 3 – Container Ports – Weekly flow projected for 24 to 30 March (measured in TEUs)

| 7-day flow reported (24/03/2025 – 30/03/2025) | | | |
|---|---------------|---------------|------------|
| Terminal | Daily average | Weekly total | % (w/w) |
| Durban Container Terminal (Pier 2) | 4 440 | 31 078 | ↑6% |
| New Pier (Pier 1) | 1 641 | 11 490 | ↓4% |
| Cape Town Container Terminal | 2 113 | 14 793 | ↓4% |
| Ngqura Container Terminal | 1 989 | 13 922 | ↓22% |
| Port Elizabeth Container Terminal | 272 | 1 907 | ↓24% |
| Other | 925 | 6 474 | ↑257% |
| Total | 11 381 | 79 665 | ↓1% |

Source: Calculated from TPT, 2025. Updated 23/03/2025.

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.

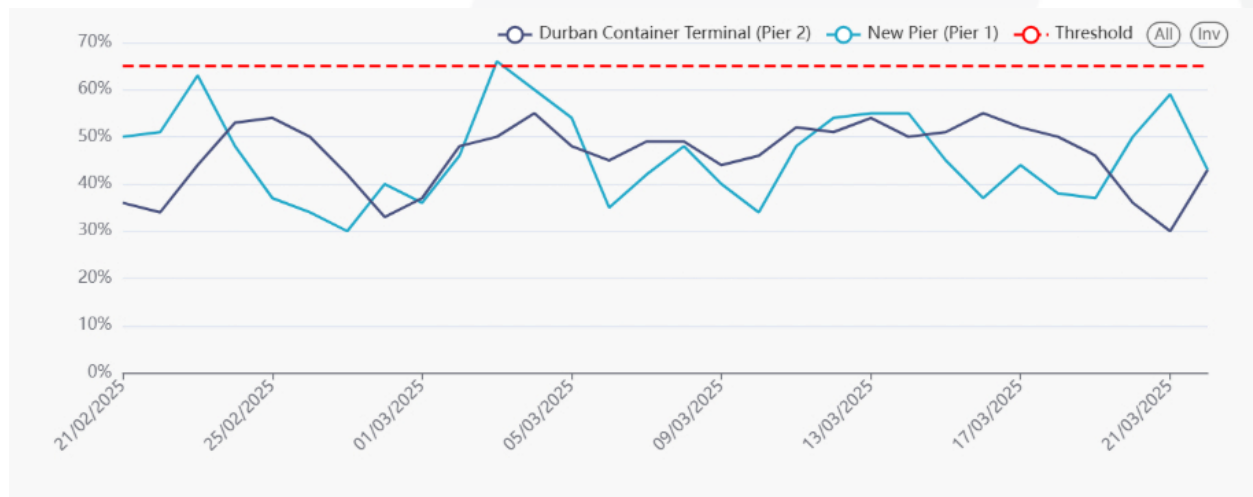
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 23/03/2025.

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

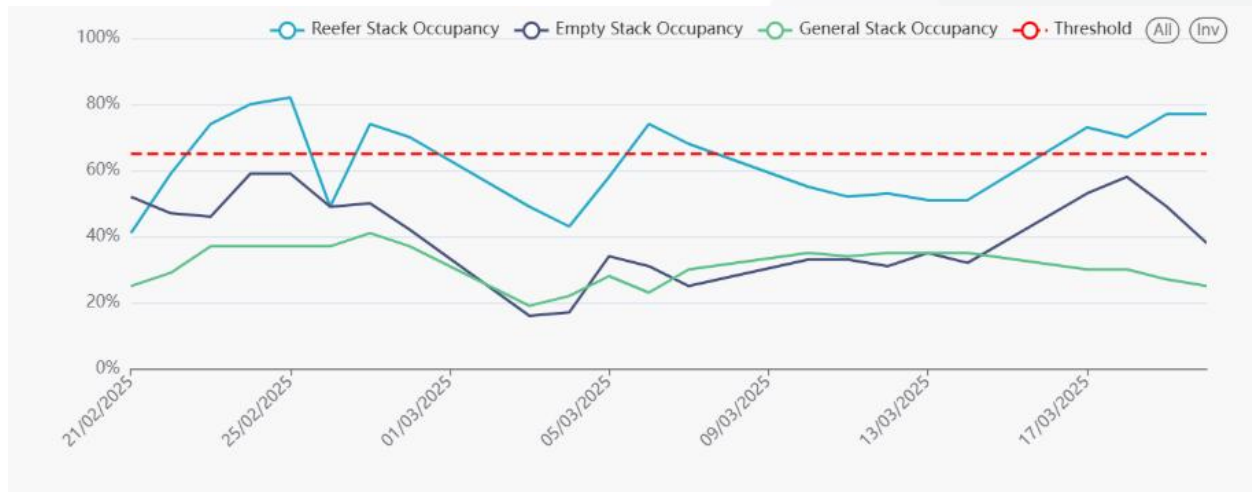
Figure 4 – Stack occupancy in DCT, general-purpose containers (21 February to present; a day on the day)



Source: Calculated using data from Transnet, 2025, and updated 23/03/2025.

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 (21 February to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 23/03/2025.

b. Summary of port operations

i. Weather and other delays

- The Port of Cape Town conceded more than 30 operational hours this week to adverse weather.
- The main operational constraints in Durban proved to be adverse weather and continuous equipment breakdowns.
- Inclement weather conditions and vacant berths mainly impacted operations at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

ii. Cape Town

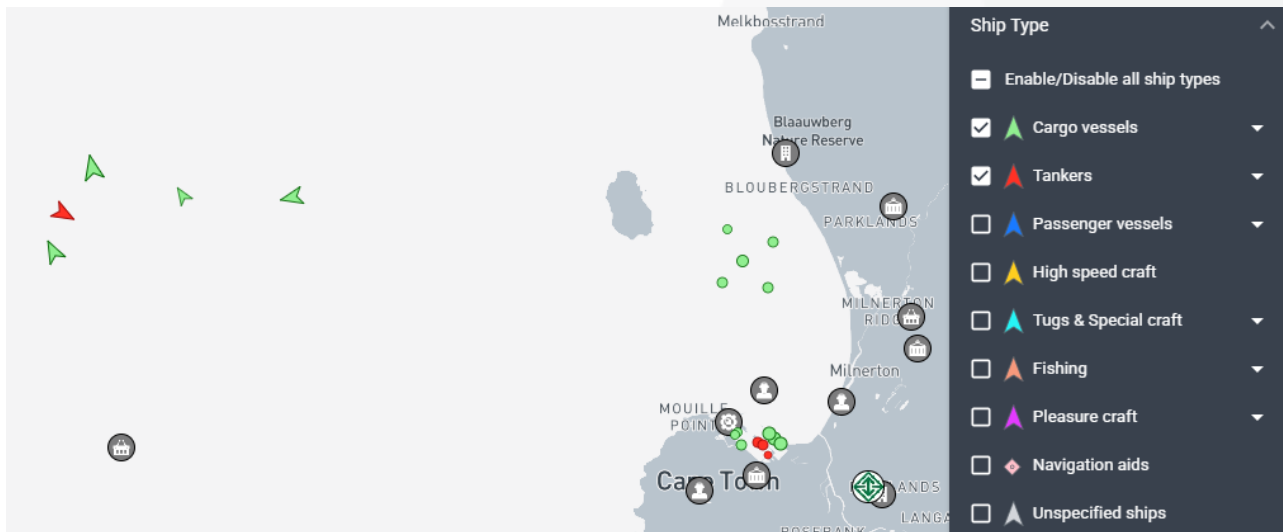
On Thursday, CTCT recorded three vessels at berth and five at anchor, as adverse weather conditions proved to be the primary operational constraint. On the landside, between Monday and Thursday, the terminal managed to service at least 4 641 trucks while handling approximately 371 rail units. On the waterside, the terminal executed approximately 3 196 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 25%, reefers at 73%, and empties at 38%**. Additionally, the terminal operated with **eight STS cranes, 24 RTGs, and 64 hauliers** towards the end of the week. The latest reports suggest that Crane LC2 went out of commission for planned maintenance. The terminal conceded more than 30 operational hours to strong winds this week. The technical team is currently assessing the risks associated with the retrieval of the container, which may result in some operational delays should an attempt be made to retrieve the container. Lastly, on Wednesday, 19 March, the “*MSC Resilient*” whilst working at Berth 601 in Cape Town lost a container overboard, which impacted operations at the berth.

On Thursday, CTMPT recorded one vessel at berth and one at outer anchorage. Over the preceding 24 hours, the terminal successfully handled 59 container moves across the quay on the waterside. On the landside, 65 trucks were processed during the same period. Stack occupancy was recorded at 12% for general cargo, 24% for reefers, and 13% for empty containers. Towards the end of the week, the terminal operated with three cranes and four straddle carriers.

Between 10 and 16 March, the FPT terminal handled seven vessels: three multi-cargo, two dry bulk, one breakbulk, and one container vessel. Berth occupancy during this period was recorded at 87%. The terminal

planned to handle five more vessels between 17 and 23 March, with another six vessels scheduled between 24 and 30 March. 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 24/03/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, operated by five gangs, with zero vessels at anchor. Stack occupancy was **50%** for **GP containers**. Between Monday and Friday, the terminal executed approximately 4 206 gate moves and 366 rail moves on the landside. The **average TTT** for the week was **~71 minutes** (**↓22%**, w/w) and an average **staging time** of **~46 minutes** (**↓22%**). 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 **12 RTGs** towards the end of the week.

Pier 2 had three vessels on berth and one at anchorage on Thursday, as adverse weather conditions and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **36%** for **GP containers**. The terminal operated with **ten gangs** and moved over 14 900 containers across the quay between Monday and Friday on the waterside. Approximately 10 874 gate moves were executed on the landside during the same period. Over the last week, the **average TTT** was **~57 minutes** (**↓23%**, w/w) and another very low staging time of **~25 minutes** (**↓58%**), as landside operations continue to perform well. Approximately 1 833 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **56** and **63** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **68%** during this period.

Durban's MPT terminal recorded two vessels at berth on Thursday and zero at outer anchorage. Stack occupancy for containers was 23%, with the breakbulk stack around 65%. In the preceding 24 hours, the terminal handled 282 containers and 4 360 tons of breakbulk on the waterside. On the landside, 310 container trucks and 108 breakbulk RMTs were serviced. During this period, three cranes, five reach stackers, seven forklifts, and 16 ERFs were in operation. The latest reports suggest that the fourth crane should return to service around the end of July.

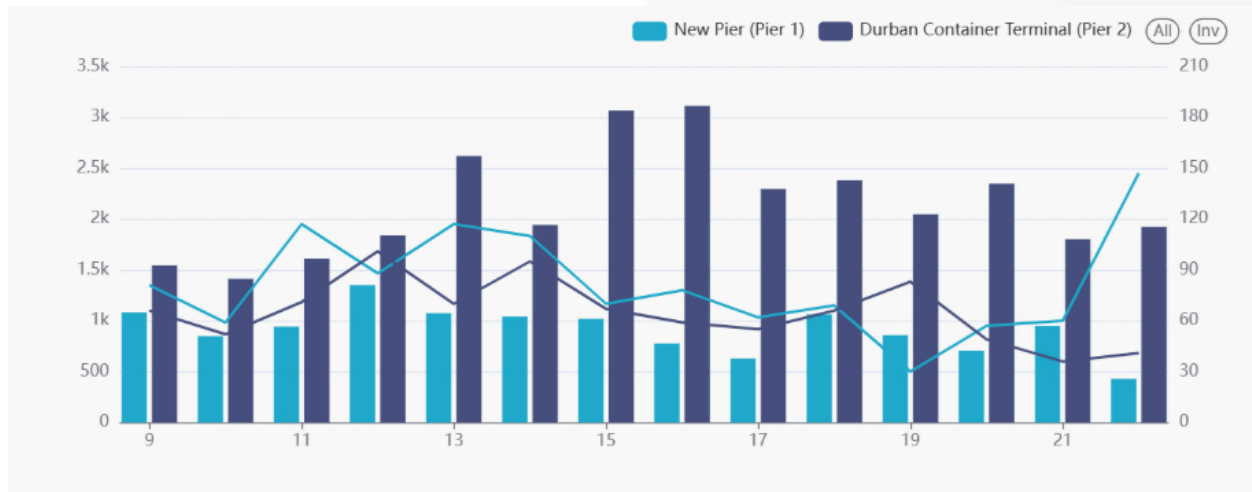
On Wednesday, the Maydon Wharf MPT recorded one vessel at berth and none at anchor. On the waterside, 1 391 tons were handled across the quay in the 24 hours leading to Thursday. On the landside, no trucks

were handled during this period. No waterside nor landside volumes were handled at the agri-bulk facility during this week, with the next vessel scheduled for arrival on 23 March.

On Thursday, the Ro-Ro terminal in Durban recorded three vessels on the berth, with none at anchorage. In the 24 hours before, the terminal handled 2 152 road and 260 rail units on the landside while handling 3 370 units on the waterside. Overall stack occupancy was 87%, 50% at Q&R, and 30% at G-berth. During this period, the terminal had 141 high-and-heavy (abnormal loads) on hand and managed to handle 66.

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.

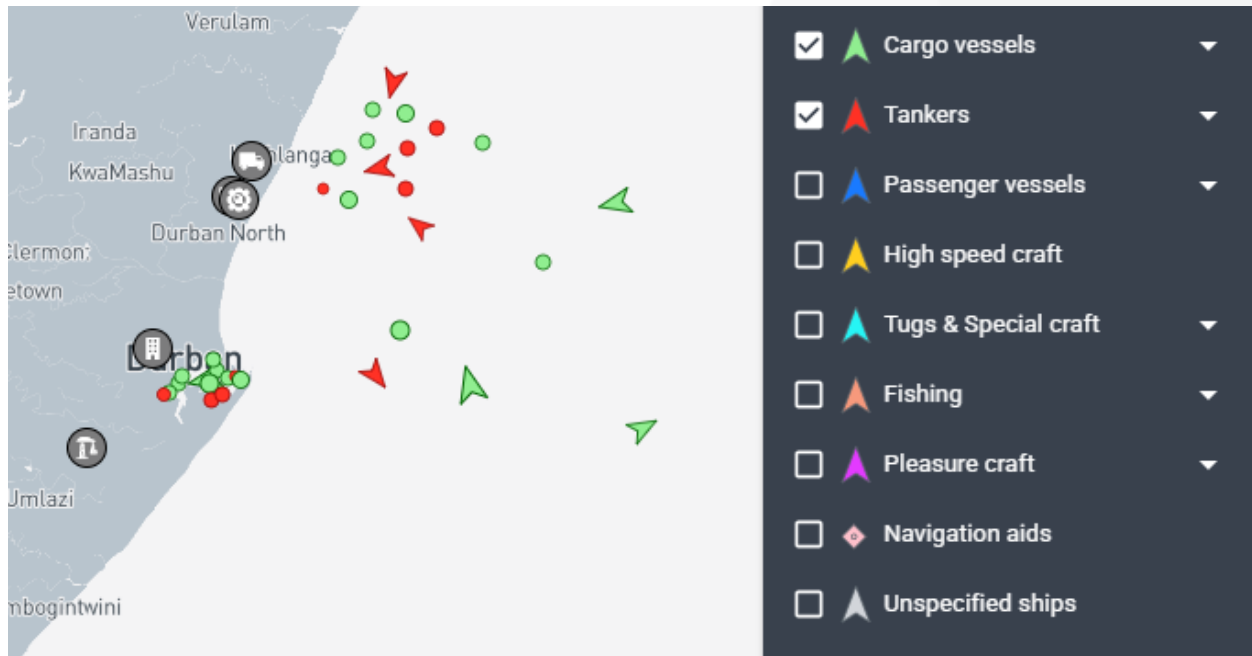
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 23/03/2025.

The queue of container vessels waiting outside Durban remains relatively low. On Monday evening (24 March), **one** container vessel was waiting for Pier 1, **zero** for Pier 2, and **one** for Point. Several dry, liquid, and breakbulk vessels remain in the queue, as evidenced by the snapshot:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 24/03/2025 at 14:00.

iv. Richards Bay

On Friday, Richards Bay had ten vessels at anchor and eight on the berth, translating to three vessels at DBT, three at MPT, two at RBCT, and none at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources towards the end of the week. Adverse weather conditions ensured some operational delays towards the end of the week. The daily average for the week increased again to around **191 500 tons (↑9%, w/w)**. An average of **21 trains** (down by two from last week) were serviced on the landside, which is slightly below the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded three 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 24% for reefers, 37% for reefer ground slots, and 25% for the general stack. Despite having vacant berths and experiencing equipment breakdowns during this period, the terminal handled over 2 300 TEUs and 67 reefers on the waterside. Approximately 516 trucks were processed on the landside at a TTT of ~26 minutes. Additionally, two trains were serviced at a rail turnaround time of four hours. Towards the end of the week, the terminal had seven STS cranes, 27 RTGs, and 76 hauliers in service.

The latest reports from Maersk suggest that the Santa Rita/250N will do a Northbound NCT call upon completion of operations in Durban. Her current ETA is 27 March, weather permitting, and offers a very attractive transit time to Europe from Durban and Port Elizabeth. The plan thus remains for the Santa Rita to omit the Port of Cape Town.

The latest reports from Maersk suggest that the Maersk Cubango 510E will most likely encounter delays in Cape Town, facing a high waiting time of ten days. Furthermore, with the threat of fog over the weekend, additional delays at the port are likely. Thus, to mitigate further schedule disruptions, a decision has been

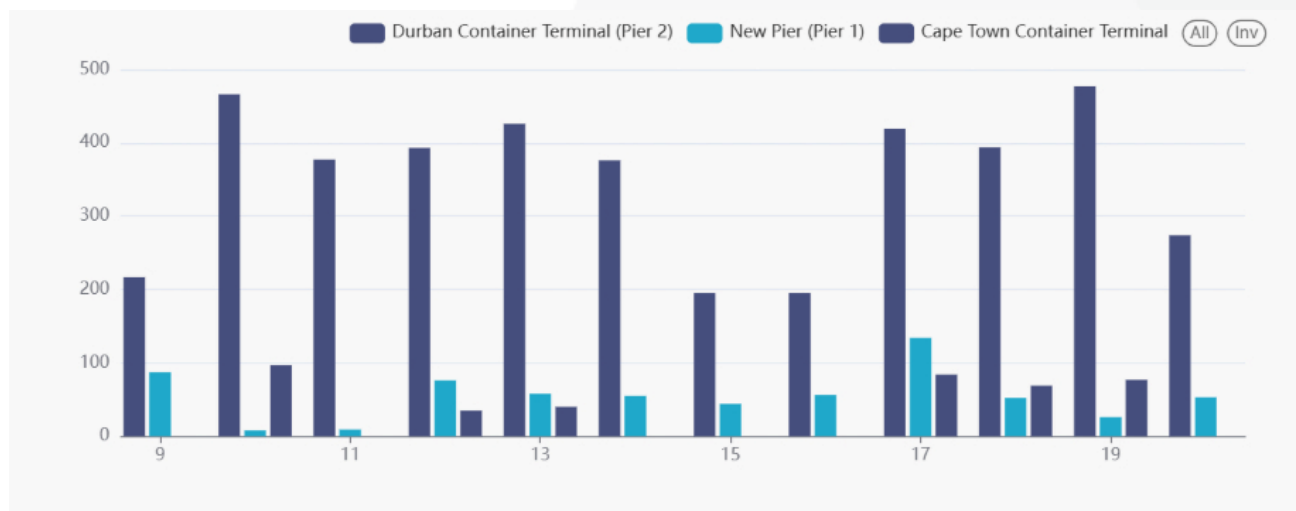
made to omit Coega, allowing the vessel to recover its schedule. As a result, the vessel will proceed directly to Jebel Ali after completing its Cape Town call.

On Thursday, GCT had one vessel at berth and one at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the preceding 24 hours. During this period, 280 trucks were processed at a TTT of ~34 minutes on the landside, while 789 TEUs and 64 reefers were handled across the quay on the waterside. Stack occupancy was recorded at 22% for the general stack, 15% for reefers, and 33% 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. Transnet Freight Rail (TFR)

The main operational challenge on the rail network this week was the floods that occurred in and around Durban. The extent of the challenges, however, remains undisclosed. Furthermore, towards the end of the week, DCT Pier 2 had 146 ConCor units on hand with a dwell time of 48 hours and 358 over-border units with a dwell time of 58 days.

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



Source: Calculated using data from Transnet, 2024. Updated 23/03/2025.

In the last week (17 to 23 March), rail cargo out of Durban was reported at **2 842** containers, up **↑1%** from the previous week’s **2 806** containers.

vii. General updates

The latest reports from Maersk suggest that the much-improved operational landscape in South Africa is continuing with minimal waiting time, low terminal and yard density, plenty of depot capacity and robust equipment position. In slight contrast to the above statement, waiting times at CTCT are currently between 4-9 days and around three days at CTMPT. Waiting times at DCT Pier 1 and 2 are currently between 0 and 3 days, with the rest of our ports having no waiting time.

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 10 March. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *March 2024* averaged **~895 184 kg** daily.

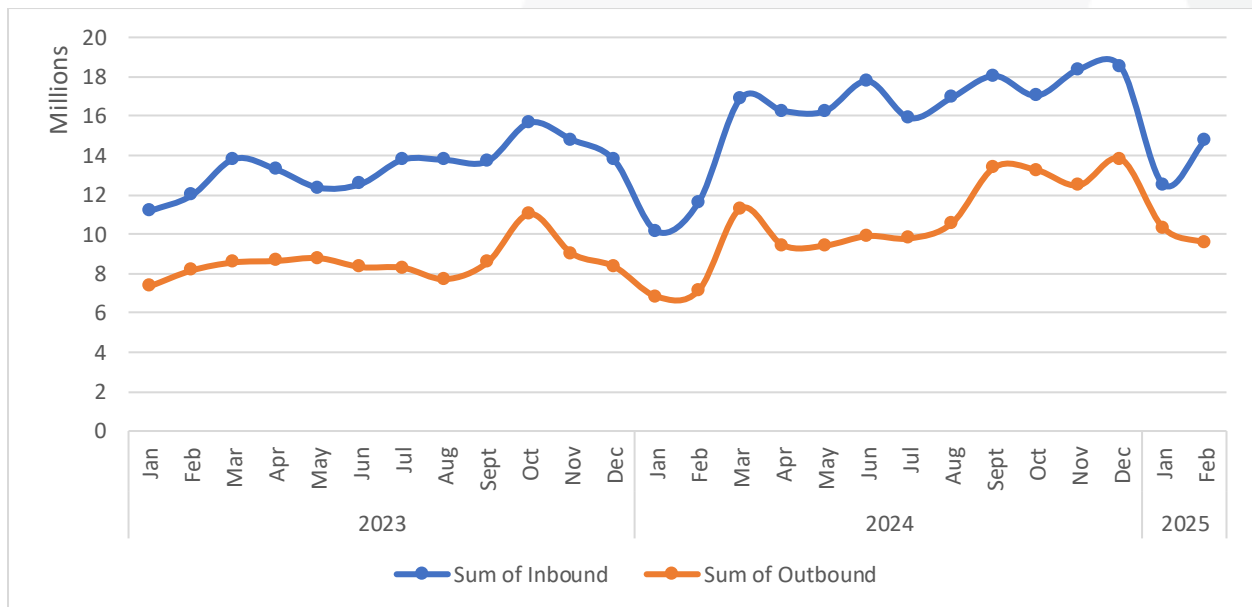
Table 4 – International inbound and outbound cargo from OR Tambo

| Flows | 10-Mar | 11-Mar | 12-Mar | 13-Mar | 14-Mar | 15-Mar | 16-Mar | Week |
|------------------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|------------------|
| Volume inbound | 419 314 | 195 382 | 410 346 | 205 648 | 315 214 | 287 990 | 2 260 660 | 4 094 554 |
| Volume outbound | 151 674 | 178 137 | 239 569 | 197 013 | 189 760 | 180 600 | 1 610 509 | 2 747 262 |
| Total | 570 988 | 373 519 | 649 915 | 402 661 | 504 974 | 468 590 | 3 871 169 | 6 841 816 |

Courtesy of ACOC. Updated: 23/03/2025.

In the air cargo space, the daily average of air cargo handled at ORTIA in the previous week amounted to **584 936 kg** inbound (↓7%, w/w) and **392 466 kg** outbound (↑2%). The current trends indicate that volumes are about **↑9%** (y/y) above the average levels of 2024 and a significant **↑25%** above the same pre-pandemic levels of 2020. 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)

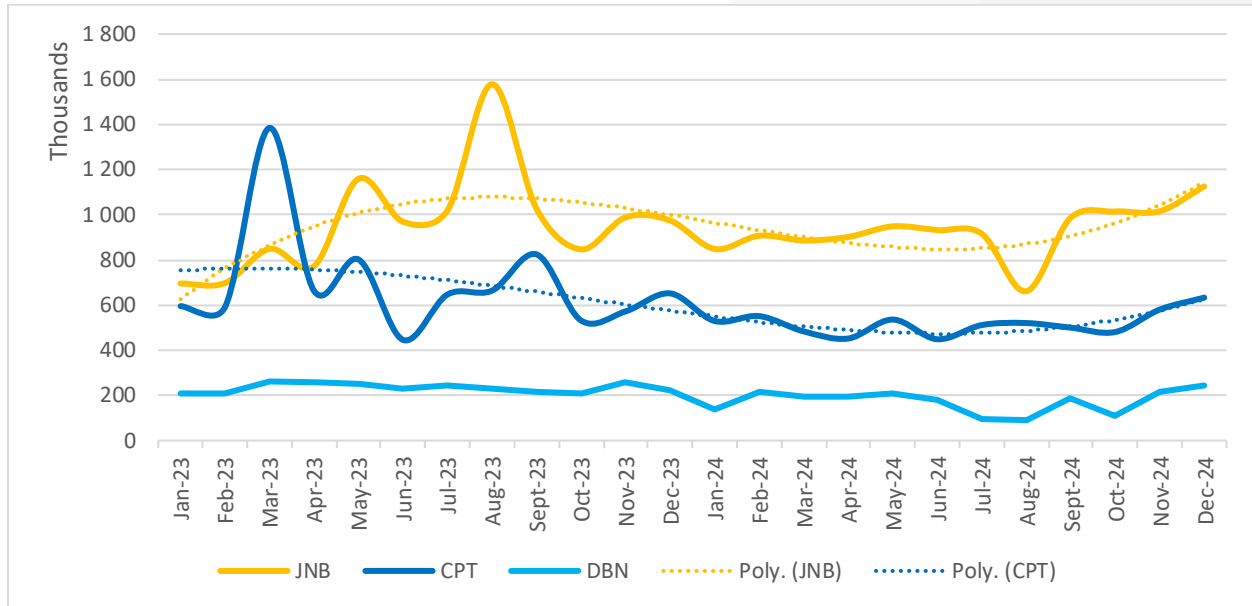


Calculated from ACOC. Updated: 23/03/2025.

b. Domestic air cargo

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 23/03/2025.

3. Road and Regional Update

a. Lebombo border post update

As of the week spanning 17 to 23 March, cargo flows are relatively unabated across the N4 corridor, with no issues reported. The following notes summarise the recent developments:

- Truck volumes increased slightly this week at **1 480 HGVs per day** (↓2%, w/w), with **4,4 hours'** worth of queuing time and an average border time of around **4,3 hours** per crossing.
- Rail to Maputo was stable at an average of **seven trains a day**.
- Sugar trains from Eswatini were around **1,5 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 | No delays | 2 000 | 20 | 10 | 6 | 4 |
| 17-Mar-25 | 1 593 | 1 607 | 1 424 | 60 | 10 | 40 | 14 | | 11 | 8 | 1 | 2 | 11 |
| 18-Mar-25 | 1 394 | 1 318 | 1 033 | 192 | 35 | 45 | 13 | | 7 | 7 | 0 | * | 7 |
| 19-Mar-25 | 1 505 | 1 461 | 1 110 | 196 | 44 | 41 | 24 | | 7 | 6 | 0 | 1 | 7 |
| 20-Mar-25 | 1 518 | 1 436 | 1 014 | 256 | 37 | 57 | 48 | | 1 | * | 1 | * | 1 |
| 21-Mar-25 | 1 479 | 1 493 | 1 076 | 252 | 47 | 56 | 62 | | 0 | * | * | * | 0 |
| 22-Mar-25 | 1 569 | 1 464 | 1 094 | 246 | 15 | 52 | 57 | | 0 | * | * | * | 0 |
| 23-Mar-25 | 1 303 | 1 293 | 950 | 147 | 32 | 71 | 70 | | 2 | * | 2 | * | 2 |

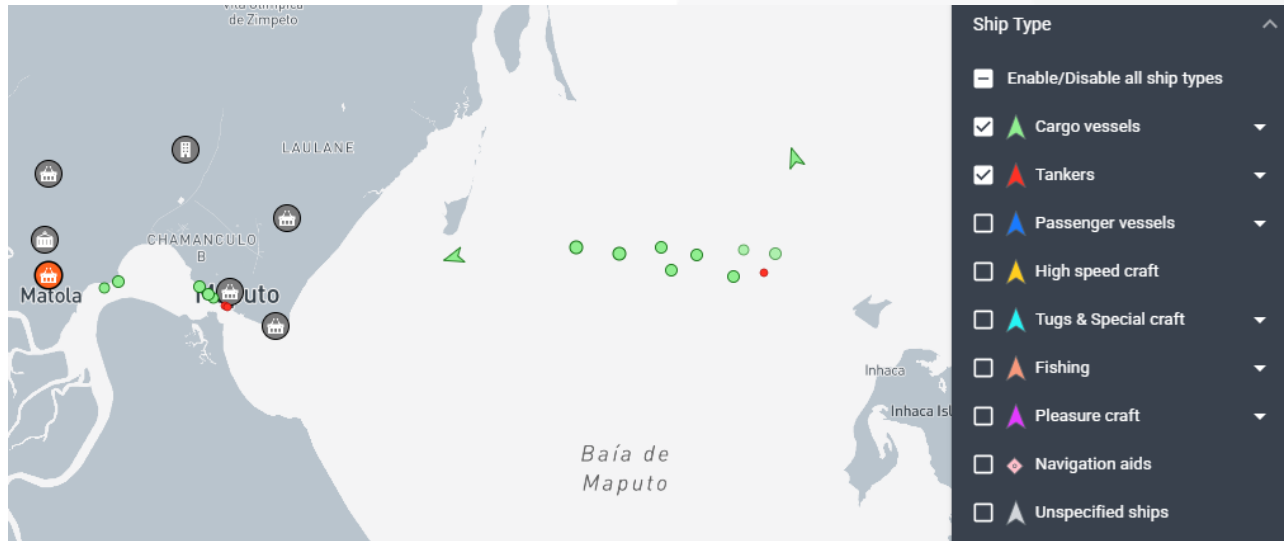
| | | | | | | | | | | | | | |
|----------------------|------|------|------|------|------|------|-----|-----|------|-------|-----|-------|------|
| % of design capacity | 99% | 96% | 92% | 96% | n/a | 103% | 82% | n/a | 20% | 70% | 13% | 38% | 20% |
| % change (d/d) | -17% | -12% | -13% | -40% | 113% | 37% | 23% | n/a | -86% | -100% | * | -100% | -86% |

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 23/03/2025.

* = 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 24/03/2025 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 a **quarter of an hour** from last week, as the transit times **remained the same on average**.
- The median border crossing times at South African borders increased by nearly **three hours**, averaging **~11,0 hrs (↑34%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) also increased, by almost an hour, averaging **~5,2 hrs (↑18%)**.

1. Groblersbrug border post:

- Operations are expected to resume shortly following cable replacements and power restoration by Eskom, as final repairs are nearing completion.
- The Transit Assistance Bureau (Transist) has announced that the border post will officially reopen on Thursday, 27 March, at 14h00.⁶

2. Security alert – Kopfontein route:

- Transporters are advised of increased hijacking incidents on the R49 near Zeerust.

3. Driver fines at Beitbridge:

⁶ Goddard, E. 25/03/2025. [Botswana backlogging: flood-damaged border to reopen](#).

- A Zimbabwean transporter was fined by both ZRP (US\$30) and CBRTA (R2 000) for holding an outdated PDrP licence.
- This reflects ongoing enforcement efforts that have been in place for over a year.

4. Transit fuel duty in Zimbabwe:

- A recent stakeholder meeting with Zimbabwe's Finance Minister reaffirmed that duties on transit fuel must still be paid.
- While AEO status could enable eventual refunds, transporters report significant delays, with some waiting since 2023. Many view the "revolving refund" model as unviable.
- FESARTA cautioned that high costs and limited benefits may drive transporters toward alternative, duty-free routes.

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

Table 6 – Delays⁷ 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 | 459 | 27,2 | 7,3 | 24,0 | 13 770 | 3 213 |
| Beitbridge | Zimbabwe-SA | 404 | 13,4 | 2,1 | 10,2 | 12 120 | 2 828 |
| 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 | 282 | 9,5 | 2,1 | 13,6 | 8 460 | 1 974 |
| Tlokweng | Botswana-SA | 133 | 0,6 | 0,2 | 1,0 | 3 990 | 931 |
| Violsdrift | SA-Namibia | 30 | 3,8 | 1,3 | 3,4 | 900 | 210 |
| Noordoewer | Namibia-SA | 20 | 1,9 | 0,4 | 2,1 | 600 | 140 |
| Nakop | SA-Namibia | 30 | 3,9 | 1,4 | 6,5 | 900 | 210 |
| Ariamsvlei | Namibia-SA | 20 | 1,3 | 0,4 | 1,2 | 600 | 140 |
| Skilpadshek | SA-Botswana | 256 | 13,1 | 3,4 | 25,0 | 7 680 | 1 792 |
| Pioneer Gate | Botswana-SA | 93 | 2,1 | 1,1 | 2,0 | 2 790 | 651 |
| Lebombo | SA-Mozambique | 1 516 | 4,4 | 1,0 | 4,3 | 45 480 | 10 612 |
| Ressano Garcia | Mozambique-SA | 1 407 | 1,9 | 0,2 | 1,5 | 42 210 | 9 849 |
| Sum/Average | | 4 650 | 5,9 | 1,5 | 6,8 | 139 500 | 32 550 |

Source: TLC, FESARTA, & Crickmay, week ending 16/03/2025.

Table 7 – Delays summary – Corridor perspective

| Corridor | HGV Arrivals per day | Queue Time | Border Time – Best 5% | Border Time – Median | Est. HGV Tonnage per day | Weekly HGV Arrivals |
|------------------------|----------------------|------------|-----------------------|----------------------|--------------------------|---------------------|
| Beira Corridor | 320 | 13,4 | 3,3 | 13,3 | 9 600 | 2 240 |
| Central Corridor | 798 | 1,9 | 0,5 | 2,5 | 23 940 | 5 586 |
| Dar Es Salaam Corridor | 1 819 | 12,7 | 1,3 | 12,6 | 54 570 | 12 733 |

⁷ 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.

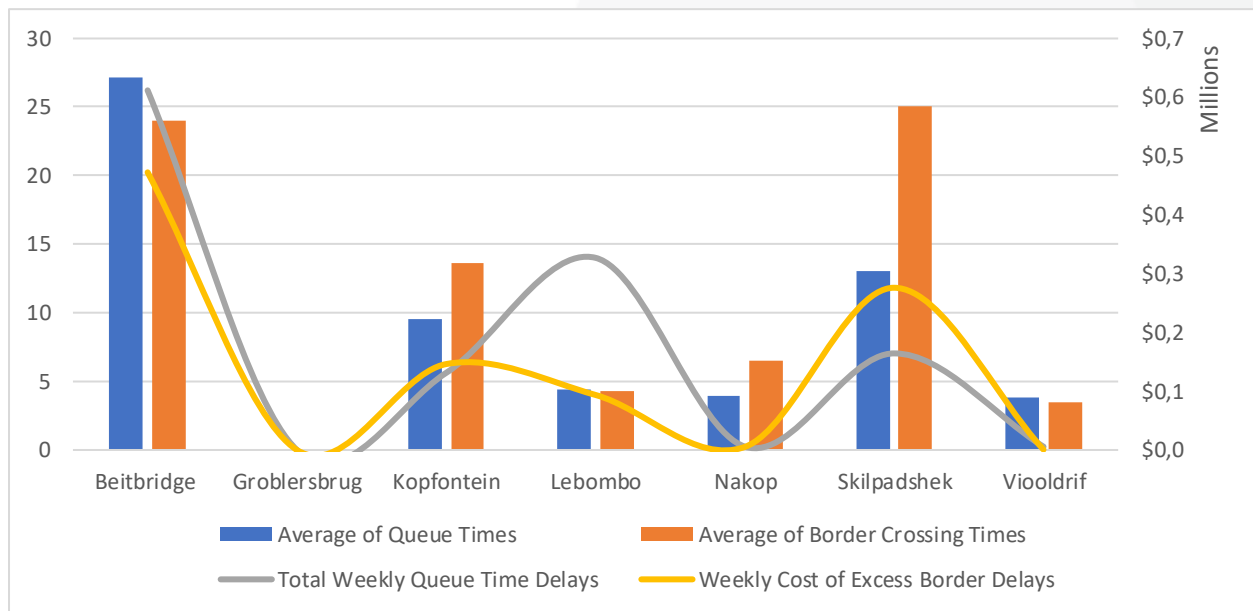
⁸ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

| Corridor | HGV Arrivals per day | Queue Time | Border Time – Best 5% | Border Time – Median | Est. HGV Tonnage per day | Weekly HGV Arrivals |
|-------------------------|----------------------|------------|-----------------------|----------------------|--------------------------|---------------------|
| Maputo Corridor | 2 923 | 3,2 | 0,6 | 2,9 | 87 690 | 20 461 |
| Nacala Corridor | 127 | 0,0 | 0,0 | 0,0 | 3 810 | 889 |
| North/South Corridor | 3 350 | 8,9 | 1,4 | 8,8 | 100 500 | 23 450 |
| Northern Corridor | 2 817 | 1,1 | 0,1 | 1,1 | 92 520 | 21 588 |
| Trans Caprivi Corridor | 116 | 23,8 | 3,4 | 22,6 | 3 480 | 812 |
| Trans Cunene Corridor | 100 | 0,0 | 0,0 | 0,0 | 3 000 | 700 |
| Trans Kalahari Corridor | 379 | 5,0 | 1,4 | 7,7 | 11 370 | 2 653 |
| Trans Oranje Corridor | 100 | 2,7 | 0,9 | 3,3 | 3 000 | 700 |
| Sum/Average | 12 849 | 5,6 | 0,9 | 5,8 | 393 480 | 91 812 |

Source: TLC, FESARTA, & Crickmay, week ending 16/03/2025.

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

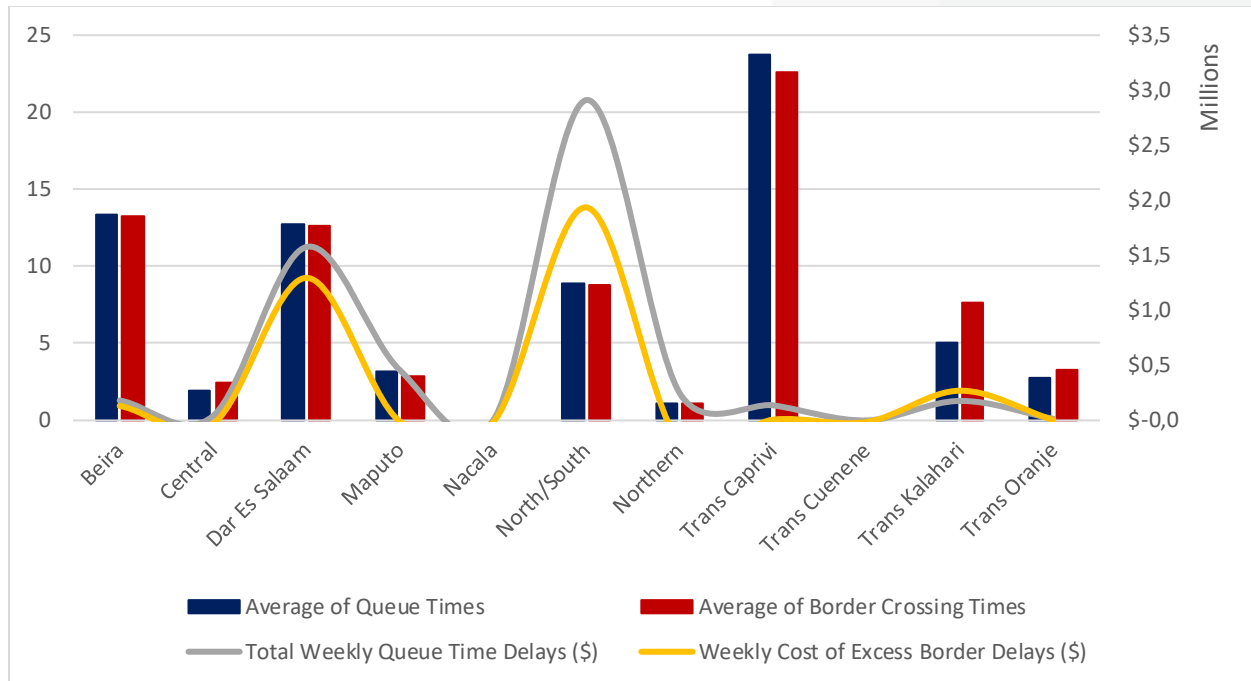
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 16/03/2025.

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 16/03/2025.

In summary, cross-border queue time averaged **~5,6 hours** (down by **~0,7 hours** from the previous week's **~6,3 hours**), indirectly costing the transport industry an estimated **\$5,7 million (R104 million)**. Furthermore, the week's average cross-border transit times hovered around **~5,8 hours (no change from the ~5,8 hours recorded in the previous report)**, at an indirect cost to the transport industry of **\$3,4 million (R61 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$9,1 million (R166 million, down by ~R18 million or ↓9,8% from ~R184 million in the previous report)**.

4. International Update

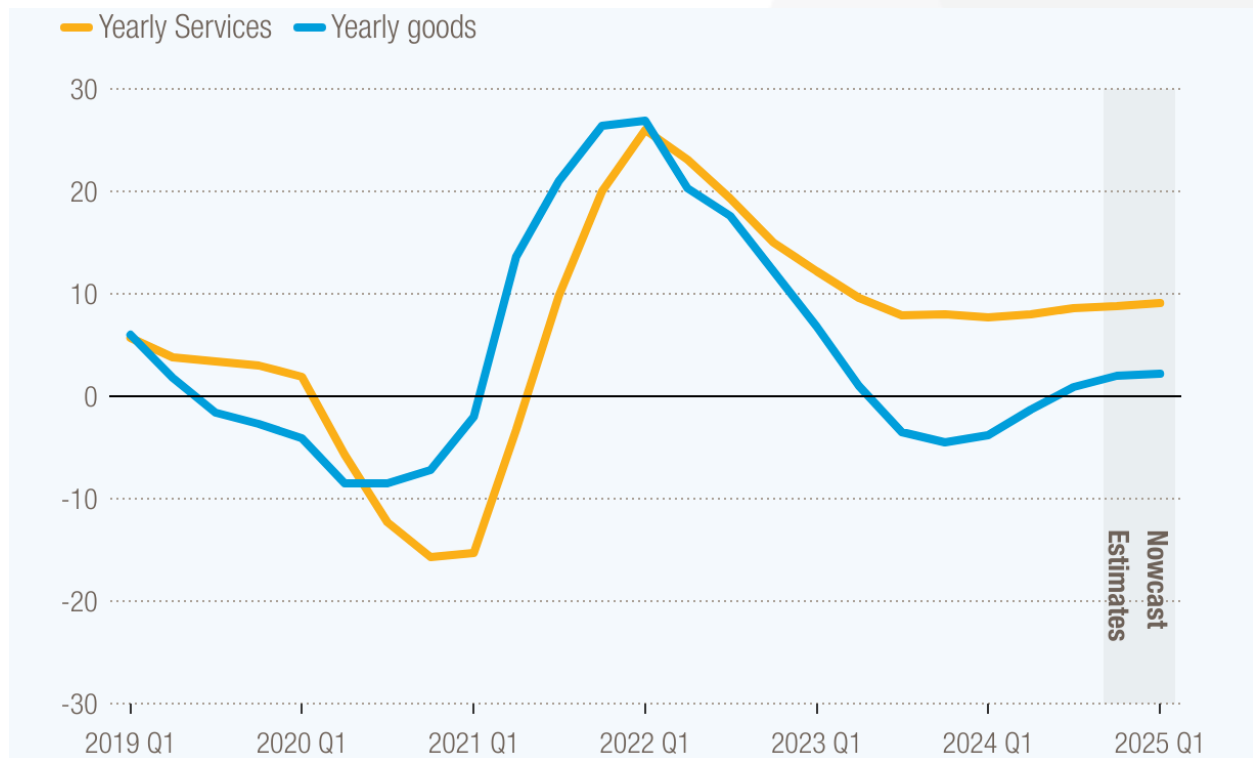
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a) global trade, (b) the global shipping industry and (c) the global aviation industry**.

a. Global trade

The latest “*Global Trade Update*” by UN Trade and Development (UNCTAD), covering data through early March, signals a shifting landscape in global trade in goods and services.⁹ In 2024, global trade reached a record **\$33 trillion** (up by **↑3,7%** from 2023), with developing economies and robust services trade driving this expansion. However, challenges such as widening trade imbalances, evolving policies, and geopolitical tensions have emerged. Notably, nearshoring and friendshoring trends have reversed, leading businesses to diversify trade networks across multiple regions to mitigate risks. Additionally, global trade imbalances have returned to 2022 levels, exemplified by the growing US trade deficit and China's expanding surplus. To navigate these uncertainties and prevent economic fragmentation, UNCTAD emphasises the importance of global cooperation and balanced policies.

⁹ UNCTAD. 14/03/2025. [Global trade in 2025: Resilience under pressure.](#)

Figure 15 – Annual growth in the value of trade in goods and services (%)



Source: [UNCTAD](#)

UNCTAD also highlights the growing importance of services trade, which is expanding faster than goods trade and offering new avenues for growth, especially for developing economies. Looking ahead to 2025, the report urges policymakers to prioritise trade resilience through innovation, digitalisation, and inclusive strategies that support sustainable development.

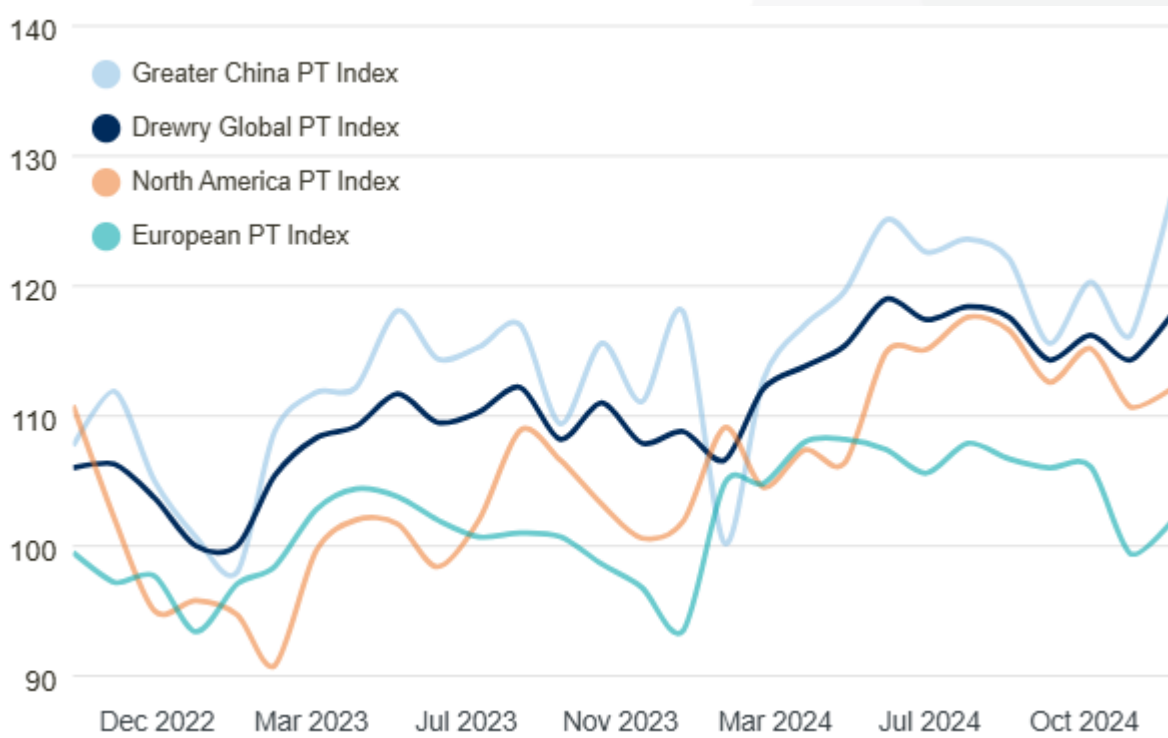
b. Global shipping industry

i. Global container throughput

In January 2025, Drewry's "Global Container Port Throughput Index" rose by **↑3,0%** (m/m) to **117,8 points**, marking an **↑8,3%** increase compared to January 2024.¹⁰

¹⁰ Drewry. 20/03/2025. [Drewry Container Port Throughput Index](#).

Figure 16 – Drewry Global Container Port Throughput Index (PTI, January 2019 = 100)



Source:

[Drewry](#)

January’s growth indicates a significant rebound in global container port activity, reflecting improved trade volumes and port operations. The Africa index rose by **↑4,7%** (m/m) to **114,6 points**, marking an **↑7,2%** increase compared to January 2024. However, Drewry notes that the index figure for Africa is based on a relatively small sample, and so should be viewed with caution.

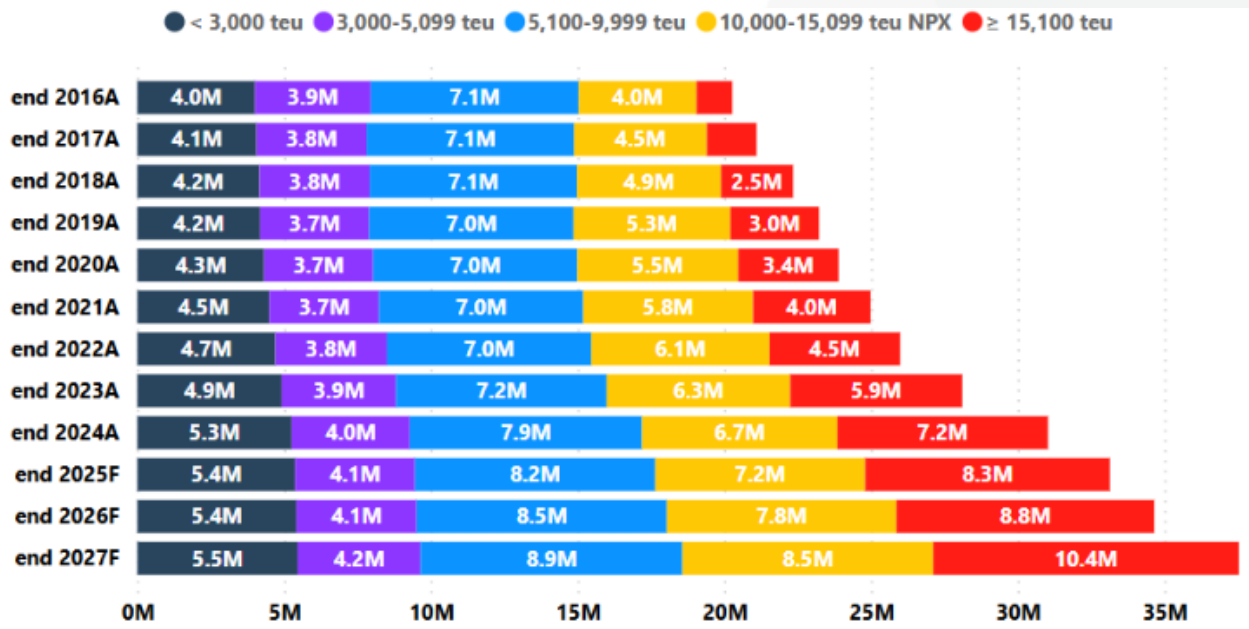
ii. Global container capacity

In a recent presentation at the FIATA HQ meetings, *McKinsey & Company* highlighted how supply chain disruptions will impact the overall growth of the container capacity market.¹¹ For 2025, the current oversupply is expected to trend around **15,2%** of the market based on the assumption of a continuation of the Suez Canal closure. The diversions via the Cape have removed approximately **10%** of TEU capacity from the market, as TEU miles have increased by **↑12%** more than the TEU trade itself, leading to an increase in distance travelled by up to **↑18%** over 2023.

Furthermore, Ultra Large Container Ships (ULCS) are projected to overtake Neo-Sub-Panamax vessels in total fleet capacity by the end of 2025. Alphaliner data shows ULCS capacity exceeding **8,3 million TEUs**, slightly ahead of Neo-Sub-Panamax at **8,2 million TEUs**. This shift reflects growing demand for larger vessels, with ULCS market share expected to rise above **28%**, up from **23%** in 2024. The trend underscores continued industry consolidation and the strategic deployment of mega-ships on high-volume trade routes.

¹¹ Woelf, T. 17/03/2025. State of global forwarding markets.

Figure 17 – Cellular fleet projections (million TEU)



Source: [Alphaliner](#)

Despite seasonal slack and falling spot freight rates, demand for container ship tonnage remains strong, driven by ongoing Red Sea disruptions.¹² The current situation has forced Maersk to temporarily abandon its strategy of maintaining capacity at no more than **4,3 million TEU**.¹³ Moreover, commercially idle containership capacity has remained exceptionally low—**under 1%**—with only **71 vessels (220 279 TEU)** idle as of mid-March, representing just **0,7%** of the global fleet. Vessel diversions via the Cape and tight supply conditions are absorbing available tonnage, while capacity in drydock for repairs or retrofitting remains stable at around **2,5%** of the total fleet.

Elsewhere, there is about **9,2% of the total fleet** absorbed by port congestion.¹⁴ Although the number of blank sailings on mainline routes increased in week 10, this was due more to port congestion-related delays rather than proactive capacity management by the carriers, with ample capacity returning to the market in the coming weeks. There are no signs that carriers are willing to sacrifice market share to prevent further rate erosion. In summary, Drewry’s “*Cancelled Sailings Tracker*” trended at an **8% cancellation rate** (24 March to 27 April).¹⁵

iii. Global freight and contract rates and carrier financials

Global container spot rates have continued their decline as Drewry’s “*World Container Index*” dropped another **↓4,4%** (or **\$104**) and now trades at **\$2 264 per 40-ft container**.¹⁶ For South Africa, the narrative is similar, albeit slightly more pronounced. The Shanghai Containerised Freight Index (SCFI) from Shanghai to Durban is currently trading around **\$4 400 per 40-ft container**. The following figure illustrates the average monthly rate developments for these two indices, with the closing gap for South Africa evident:

¹² Alphaliner. 20/03/2025. [Demand for Container Ship tonnage remains strong, as Red Sea tensions re-escalate.](#)

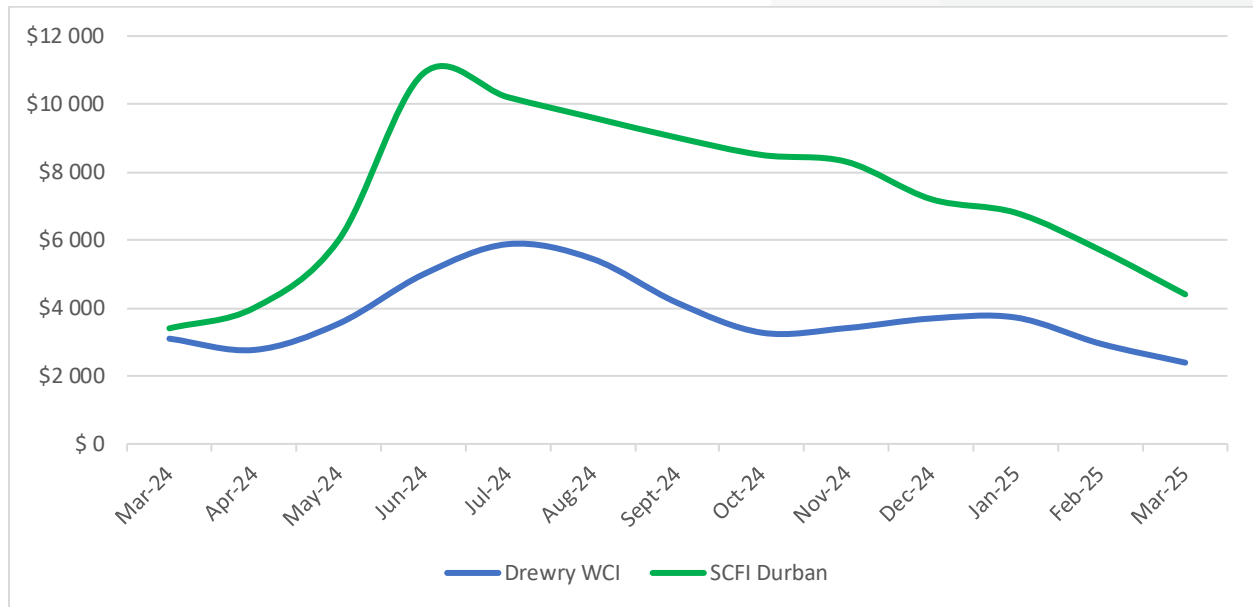
¹³ Koo, A. 19/03/2025. [Red Sea crisis forces Maersk to increase capacity over strategy limit.](#)

¹⁴ Linerlytica. 24/03/2025. [Market Pulse – Week 12.](#)

¹⁵ Drewry. 21/03/2025. [Cancelled Sailings Tracker.](#)

¹⁶ Drewry. 20/03/2025. [World Container Index.](#)

Figure 18 – World Container Index (\$ per 40ft) & SCFI to Durban (\$ per 40ft)

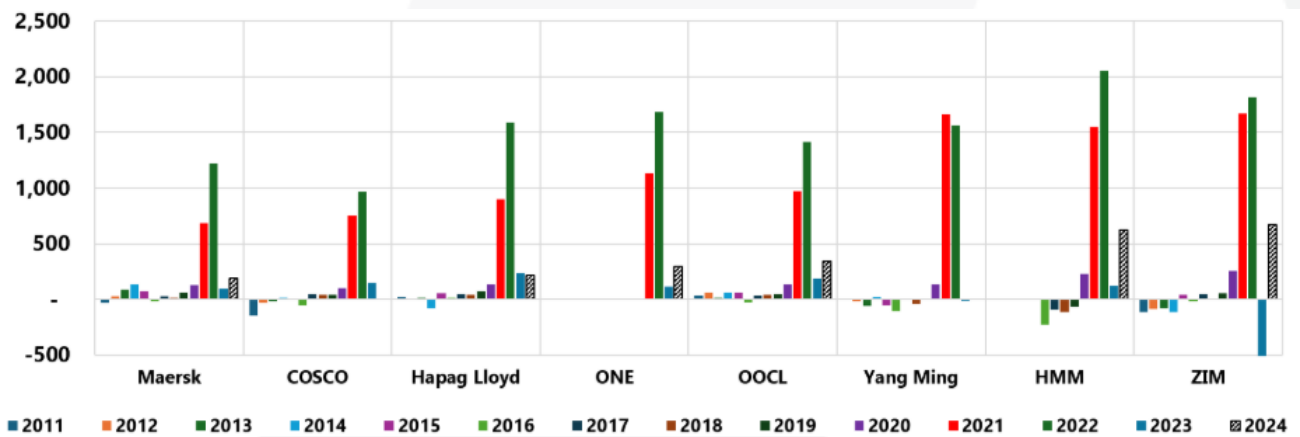


Source: Calculated from [Drewry](#) & [SCFI](#)

Charter rates also remain elevated, as the *Harper Petersen Index* (Harpex) traded around **2 075 points** (↑71%, y/y) on Friday.¹⁷

Concerning carrier financials, *Sea Intelligence* reports that major shipping lines recorded a combined EBIT of **\$27,3 billion in 2024**, significantly higher than pre-COVID years but lower than the nearly **\$200 billion** combined EBIT of 2021 and 2022.¹⁸ By extrapolating this data to include the entire market (notably MSC at number one), *Sea Intelligence* estimates total industry profitability at approximately **\$60 billion for 2024**. Notably, the 2024 EBIT surpasses the combined earnings of 2019, 2020, and 2023:

Figure 19 – Major carriers: EBIT per TEU (\$)



Source: [Sea Intelligence](#)

¹⁷ Harpex. 21/03/2025. [Harper Petersen & Co Charter Rate Index](#).

¹⁸ Murphy, A. 19/03/2025. [2024 profitability around USD 60 billion](#).

Linerlytica's analysis indicates that carriers maintained an average EBIT margin of **↑22%** in the fourth quarter of 2024, down from **↑34%** in the third quarter, with HMM and Zim leading due to their exposure to East-West routes and spot market business, while Hapag-Lloyd and Maersk underperformed, relying more on lower freight contract customers.¹⁹

iv. Further developments of note

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

1. The Chinese Government criticises CK Hutchison's agreement to sell 80% of its holdings:

- a. As reported last week, CK Hutchison Holdings has agreed to sell a significant portion of its global port assets, including key terminals at both ends of the Panama Canal, to a consortium led by MSC's Terminal Investment Limited and BlackRock, in a deal valued at over **\$19 billion**.²⁰
- b. The transaction has drawn criticism from the Chinese government, which views the divestment, particularly of strategically located assets, as potentially misaligned with national interests. This development illustrates the intersection of global commercial strategy with geopolitical sensitivities in critical trade corridors.

2. FMC empowered to investigate international 'shipping chokepoints':

- a. The US Federal Maritime Commission (FMC) has initiated an investigation into seven key global shipping chokepoints—the Northern Sea Passage, English Channel, Malacca Strait, Singapore Strait, Strait of Gibraltar, and the Panama and Suez canals—to identify regulations, policies, or practices that may create unfavourable shipping conditions.²¹
- b. This action aligns with President Donald Trump's broader strategy to revitalise the US shipping sector. The investigation underscores the administration's focus on enhancing the competitiveness of American maritime interests by addressing potential bottlenecks in international shipping routes.

c. Global air cargo industry


In week 11 (10–16 March), the international air cargo market saw a **↑1%** (w/w) increase in global tonnages, placing volumes **↑3%** higher year-on-year. Growth was led by Central and South America (**↑4%**) and a continued post-Lunar New Year rebound in Asia Pacific (**↑3%**). However, the Middle East and South Asia (MESA) region recorded a **↓4%** week-on-week drop, partly due to Holi-related business closures in and around India. Tonnages from Asia Pacific to Europe and North America showed strong two-week-on-two-week (2w/2w) recoveries, rising **↑13%** and **↑10%**, respectively. Week 11 marked the fifth consecutive weekly increase from Asia Pacific to both regions, with notable gains from South Korea, Taiwan, and Vietnam.

¹⁹ Linerlytica. 24/03/2025. [Market Pulse – Week 12](#).

²⁰ Whiteman, A. 14/03/2025. [China hits out at Hutchison plan to sell Panama port holdings to MSC](#).

²¹ Whiteman, A. 19/03/2025. [FMC empowered to investigate international 'shipping chokepoints'](#).

Figure 20 – Capacity, chargeable weight and rates by region (last two – to five weeks, % change)

| Origin Regions last 2 to 5 weeks | Capacity ¹ | | | Chargeable weight ¹ | | | Rate ¹ | | |
|-------------------------------------|---|-------|-----|--------------------------------|-------|-----|-------------------|-------|-----|
| | Last 5 wks | 2Wo2W | YoY | Last 5 wks | 2Wo2W | YoY | Last 5 wks | 2Wo2W | YoY |
| |  | | | | | | | | |
| Africa | | +1% | +8% | | +0% | +4% | | -1% | +6% |
| Asia Pacific | | -1% | +2% | | +8% | +9% | | +2% | +7% |
| C. & S. America | | -1% | -3% | | -4% | -1% | | -6% | -2% |
| Europe | | -0% | +2% | | -1% | +1% | | -1% | -2% |
| M. East & S. Asia | | -1% | +0% | | -0% | -9% | | -0% | -4% |
| North America | | +3% | +2% | | +1% | +3% | | -0% | -4% |
| Worldwide | | 0% | +1% | | +3% | +4% | | +1% | +3% |

Source: [World ACD](#)

On pricing, average spot rates from Asia Pacific to Europe remained stable at **\$3,92 per kilogram**, with annual increases around **↑16%**. Rates to the USA averaged **\$4,91/kg (↑11%, y/y)**, despite origin-level volatility. Overall, global average rates rose **↑3% (w/w)** to **\$2,37/kg**, to hover around **↑2%** higher versus this time last year.

In other air cargo news, the industry was hit with major delays to and from Heathrow. Following the fire at the North Hyde electrical substation on Thursday, 20 March, Heathrow Airport experienced a significant power outage, leading to the cancellation of approximately 1 300 flights and affecting nearly 300 000 passengers. By Saturday, the airport had resumed operations, with airlines working to clear the backlog of flights. As of Tuesday (24 March), flight schedules were largely restored, though some residual delays persisted as operations normalised.²²

Elsewhere, the US Customs and Border Protection (CBP) reported a **↓90%** decrease in revenue in February, despite only a **↓7%** reduction in processed entries. This significant revenue decline coincided with a three-day suspension of the de minimis exemption during the same month.²³ Lastly, CMA CGM Air Cargo has submitted a bid to acquire Air Belgium's cargo operations, aiming to ensure their continuity after a previous offer from a Dutch consortium was rejected by a Belgian court.²⁴

ENDS²⁵

²² NPR. 22/03/2025. [Flights resume at London Heathrow after a daylong closure sparked travel chaos.](#)

²³ Lennane, A. 14/03/2025. [US CBP sees 90% fall in revenue last month; airfreight sees ecomm slide.](#)

²⁴ Lennane, A. 20/03/2025. [CMA CGM Air Cargo eyes expansion with bid for Air Belgium.](#)

²⁵ **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.*