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Cargo Movement Update #234[1]

Date: 18 May 2025

Weekly Snapshot

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

Flows	Current[2]			Previous[3]			Growth
	Import	Export	Total	Import	Export	Total	
Port Volumes (TEUs)	39 671	45 196	**84 867**	32 111	36 583	**68 694**	**↑24%**
Air Cargo (tons)	3 525	2 338	**5 863**	3 623	2 005	**5 628**	**↑4%**

Monthly Snapshot

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

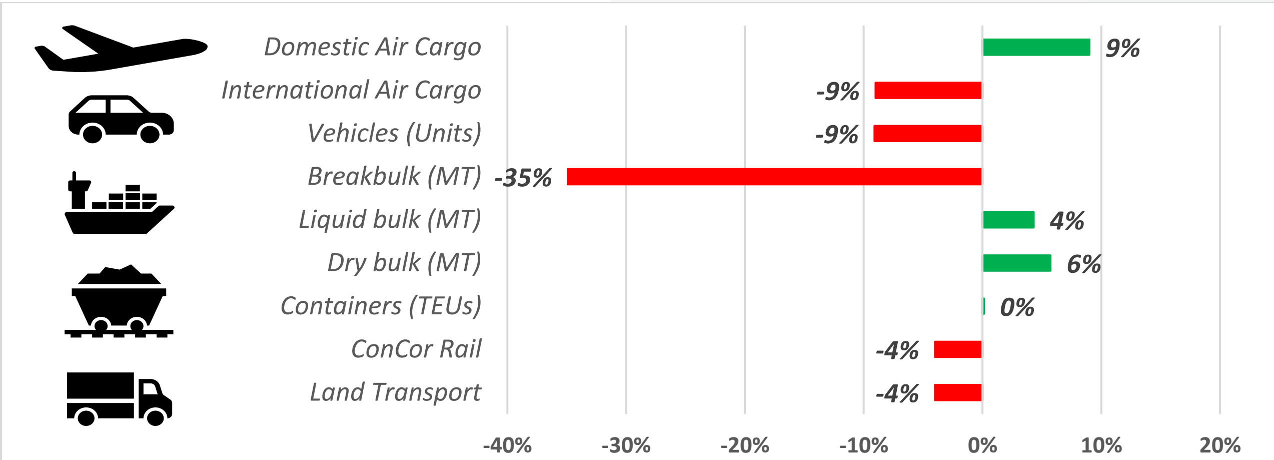
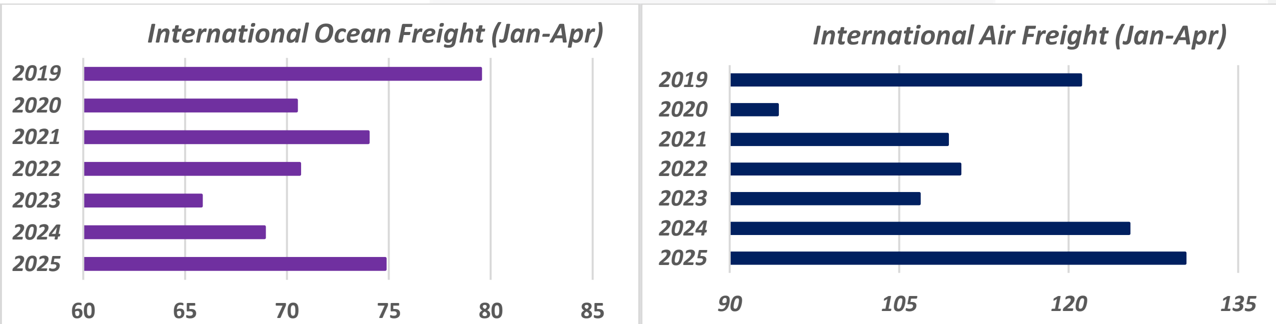


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~12 124 TEUs** was handled per day, with **~12 494 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 884** containers, down by **↓4%** from last week.
- Cross-border queue: **↑1,4 hrs**; transit: **↑1,7 hrs**; SA borders: **9,6 hrs** (**↑22%**); SADC: **4,7 hrs** (**no change**).
- Global container throughput near record in March (**↑22%**), as price index (dry & reefer) down by **↓4,8%**.
- Global spot rates jumped by a significant **↓7,6%** (or **$157**) to **$2 233 per /40'**; charter rates: stable.
- Global air cargo dropped by **↓1%** as *"de minimis"* exemption end; rates are **$2,34/kg**, down **↓2%** (w/w).

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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 *234th* update.
[2] '*Current*' means the last seven days (a week's) of available data.
[3] '*Previous*' means the preceding 8-14 days (a week) of available data.
[4] '*Monthly*' means the last months' worth of available data compared to the same month in the previous year—most metrics: Apr vs Apr.
[5] Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. At our container terminals, an average of **12 124 TEUs** was handled daily, significantly increasing from **9 813 TEUs** the previous week. Port Operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages. Equipment challenges ensured operational disruptions at the Port of Cape Town, while the main operational constraints in Durban proved to be constant equipment breakdowns, adverse weather, and network challenges. Unfavourable weather, system challenges, and vacant berths mainly impacted operations at our Eastern Cape Ports, while unavailable marine equipment resulted in operational delays at the Port of Richards Bay. The latest reports from Maersk stipulate that the Irenes Resolve will omit the Port of Durban due to undisclosed reasons. In addition, the latest reports from TFR suggest that intermittent cable theft incidents remain prominent in the Capital Park area, resulting in continuous diesel hauling as a contingency measure to move cargo on the line.

UNTU has also made its stance clear that it will not negotiate any further and will issue a 48-hour notice of industrial action should a revised wage proposal not be received from Transnet. As of 20–21 May, the Commission for Conciliation, Mediation and Arbitration (CCMA) has tabled a revised wage offer, including a marginal increase from 5,5% to 6% for year three and a proposed retrenchment guarantee. While the wage increase is unlikely to sway union sentiment significantly, the retrenchment clause could shift negotiations. Separately, an 18-hour outage of the Danskraal substation near Ladysmith temporarily closed the NATCOR corridor, highlighting persistent infrastructure fragilities in the rail network. Encouragingly, Durban's Pier 1 has operationalised 19 new RTGs, which should materially improve operational productivity in the coming weeks. Lastly, prospective improvements to the access road leading to the Durban Container Terminal are set to begin in early June, as TNPA commences a six-month rehabilitation of Bayhead Road.

Globally, Global container volumes surged in March, rebounding **↑22%** (m/m) and **↑6,5%** (y/y), driven by post–Chinese New Year seasonality and strong Far East exports. Despite this, the global price index (dry and reefer combined) dipped nearly **↓5%** (m/m), though recent tariff easing between the US and China has sparked a sharp rise in trans-Pacific bookings and freight rates, with further increases expected from June. Charter markets are tightening as carriers reposition vessels, including new entrants like KMTC. However, Maersk and Hapag-Lloyd continue to underperform on EBIT margins due to limited transpacific exposure and high operating costs. These trends suggest a temporary upswing in demand, though structural risks and competitive imbalances remain prevalent. The ongoing US-China dynamics will undoubtedly influence the market.

Air cargo volumes at ORTIA averaged **503 638 kg inbound** (**↓3%**, w/w) and **334 001 kg outbound** (**↑17%**) over the past week**.** Following a period of subdued throughput, the sector has shown a notable rebound, driven primarily by export growth. As a result, current volumes are now slightly ahead of last year's levels (**↑1%**, y/y), though still trailing pre-pandemic figures from 2019 by approximately **↓11%**. Internationally, demand has dropped further after the "*de minimis*" exemption ended. Chargeable weight decreased by **↓1%** (w/w) and **↓3%** (2w/2w).

Cargo flows across the Lebombo Border Post and N4 Corridor increased for rail and dropped only slightly for road, with truck volumes at **1 420 HGVs per day** (**↓4%**, w/w). There was a slightly increased average of **2,8 hours**' (**↑22%**) worth of queuing time at the border, as the average processing time also increased – to around **2,5 hours** (**↑14%**) per crossing. The rail to Maputo increased to an average of **nine trains daily** (up by **two**). Sugar trains from Eswatini were stable at around **two trains a day**.

Crossing times increased at several borders this week, notably in South Africa and some busy SADC borders. Overall, the average queue times increased by around **an hour and a half** from last week, as transit times increased by around **an hour and three-quarters**. The median border crossing times at South African borders increased by **an hour and three-quarters**, averaging **~9,6 hrs** (**↑22%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**). On average, four SADC borders took around a day to cross last week, namely Beitbridge, Chirundu OSBP, Kasumbalesa (the worst affected, with an average of nearly **two days** from **both the Zambian and DRC sides**), and Katima Mulilo. Other developments include **(1)** N4 Corridor challenges with poor road conditions and fuel tankers escorted into South Africa, and **(2)** Zimbabwe's transition from metal discs to plastic driver's licenses.

In summarising this week's report, despite some cyclical gains earlier in the year, the latest figures for April paint a sobering picture: container volumes declined by **↓27%**, vehicle units by **↓33%**, and total bulk cargo by **↓22%** (m/m). While public holidays and protracted wage negotiations contributed to the downturn, the underlying message is clear – South Africa's trade, transport, and logistics sector remains under systemic pressure. Reversing this trend will require collective commitment, data-led performance management, and shared accountability across the value chain. Building a logistics system that is resilient, efficient, and inclusive is not a theoretical ideal – it is an economic necessity. South Africa can reclaim its regional leadership and set a new standard in logistical competitiveness through sustained partnership, systems thinking, and a renewed focus on corridor integration and service excellence.

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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 Monday to Sunday.

Table 2 – Container Ports – Weekly flow reported for 12 to 18 May (measured in TEUs)

7-day flow reported (12/05/2025 – 18/05/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 552	31 864	↓2%
New Pier (Pier 1)	1 975	13 822	↑12%
Cape Town Container Terminal	2 139	14 976	↓0,5%
Ngqura Container Terminal	2 338	16 366	↑269%
Port Elizabeth Container Terminal	506	3 542	↑253%
Other	614	4 297	↑30%
Total	**12 124**	**84 867**	↑24%

Source: Calculated from TPT, 2025. Updated 18/05/2025.

An increased average of **~12 124 TEUs** (↑24%) was handled per day for the last week (*12 to 18 May, Table 2*), just below the projected average of **~12 494 TEUs** (↓3% actual versus projected).

For the coming week, an increased average of **~12 494 TEUs** (↑3%) is predicted to be handled (*19 to 25 May, Table 3*). This week, Port Operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages.

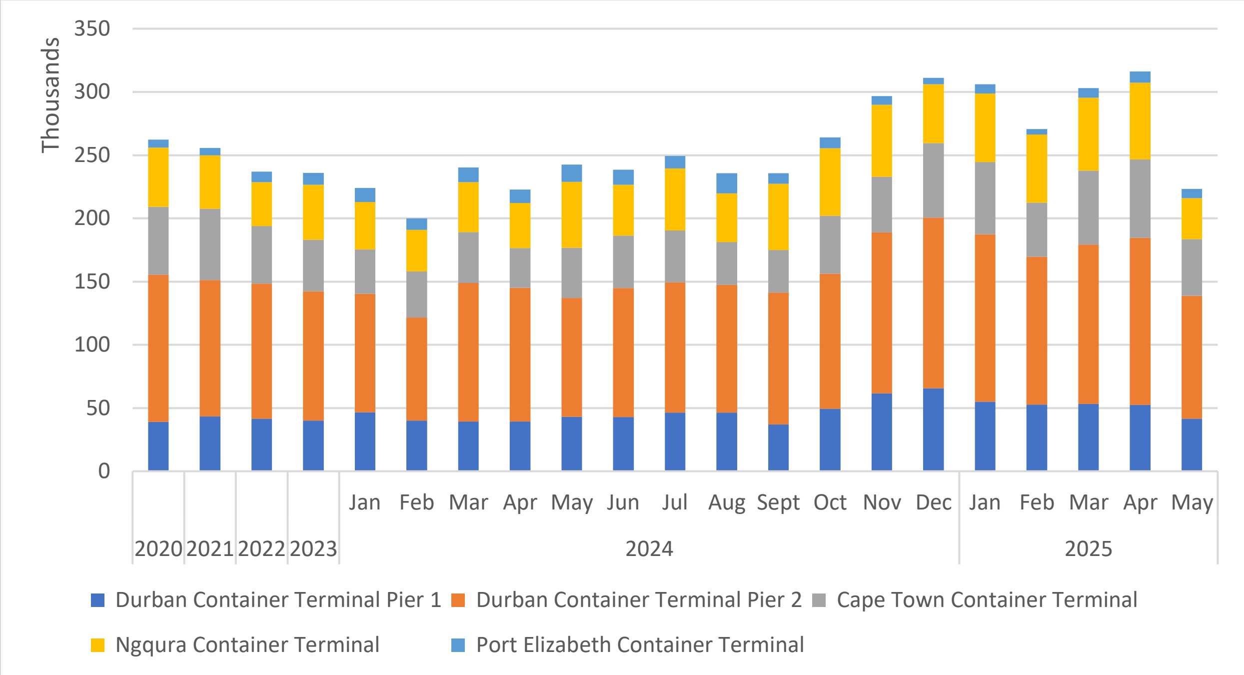
Table 3 – Container Ports – Weekly flow projected for 19 to 25 May (measured in TEUs)

7-day flow projected (19/05/2025 – 25/05/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 258	36 806	↑16%
New Pier (Pier 1)	2 016	14 109	↑2%
Cape Town Container Terminal	1 755	12 283	↓18%
Ngqura Container Terminal	2 059	14 414	↓12%
Port Elizabeth Container Terminal	454	3 178	↓10%
Other	952	6 667	↑184%
Total	**12 494**	**87 457**	↑3%

Source: Calculated from TPT, 2025. Updated 18/05/2025.

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.

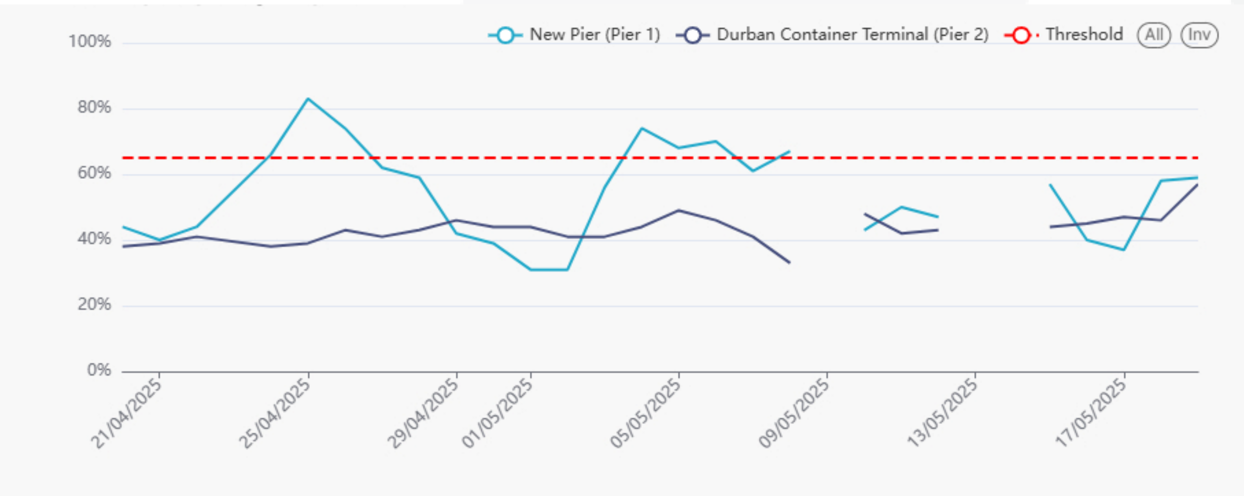
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 18/05/2025.

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

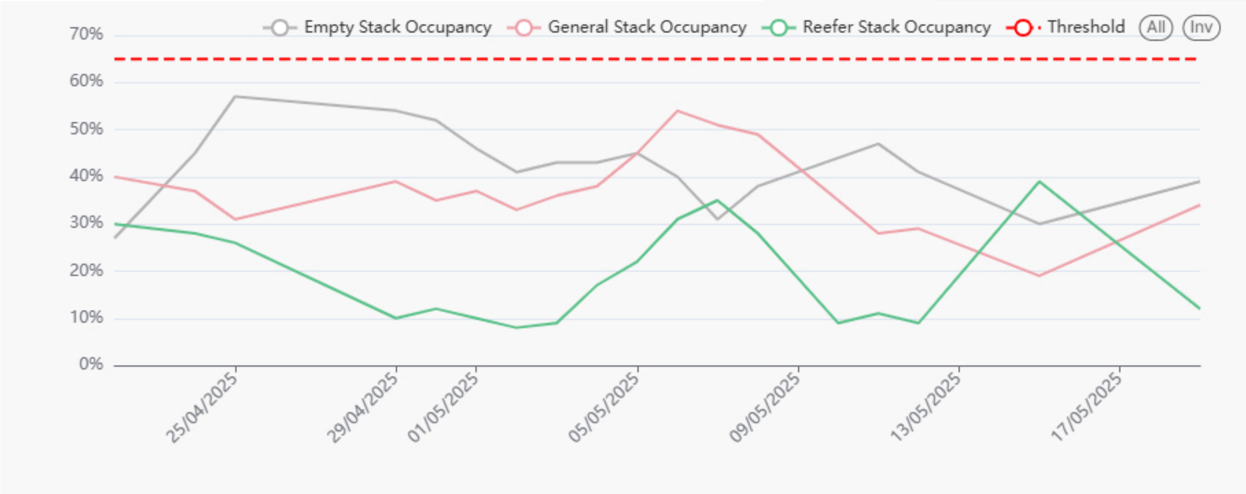
Figure 4 – Stack occupancy in DCT, general-purpose containers (21 April to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 18/05/2025.

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 April to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 18/05/2025.

b. TNPA: April update

TNPA has released consolidated port statistics for April[6], with significant drop-offs in monthly performance across the respective sub-sectors:

- Containers decreased monthly by ↓**27%** (m/m), but were stable annually by ↑**0,1%** (y/y).
- Total bulk cargo decreased monthly by ↓**22%** (m/m), but increased annually by ↑**3%** (y/y).
- Vehicles decreased monthly by ↓**33%** (m/m) and annually by ↓**9%** (y/y).

The following table shows the respective changes versus March:

Table 4 – TNPA – Monthly volume and growth: April 2025

	Mar	Apr	Movement	% Change
Containers (TEUs)	**399 631**	**293 100**	**-106 531**	**-27%**
Landed	190 385	148 431	-41 954	-22%
Shipped	209 246	144 669	-64 577	-31%
Dry bulk (MT)	16 557 887	13 309 197	-3 248 690	-20%
Liquid bulk (MT)	3 965 454	2 686 110	-1 279 344	-32%
Breakbulk (MT)	690 778	511 646	-179 132	-26%
Vehicles (Units)	83 774	55 905	-27 869	-33%
Total cargo (excl. Vehicles)	**21 214 119**	**16 506 953**	**-4 707 166**	**-22%**

Source: TNPA, updated 14/05/2025.

Transnet Port Terminals handled less than **300 thousand containers** and **17 million metric tonnes** of **bulk** cargo during April, significantly less than the **400 thousand containers** and **21,2 million metric tonnes** of **bulk** last month. These are deterring numbers after the high volumes in March; however, the year-to-date and cyclical numbers provide for better reading, as the following table suggests:

[6] Transnet. 2025. Port statistics.

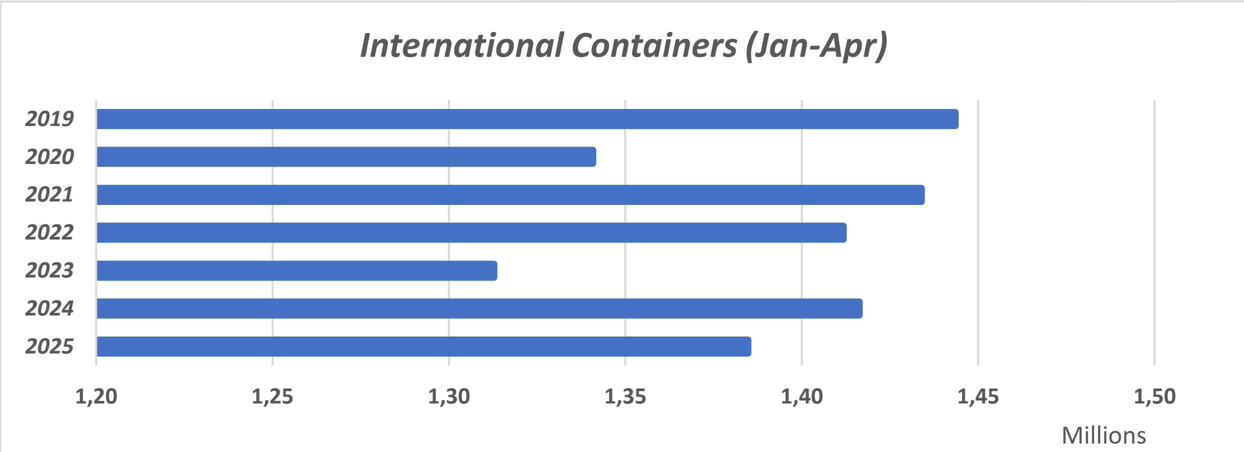
Table 5 – TNPA – Cyclical volume and growth: April 2019, 2024, and 2025

	2019	2023	2024	Growth: '20-'25	Growth: '24-'25
Containers (TEUs)	**384 428**	**292 747**	**293 100**	**-24%**	**0%**
Landed	199 568	165 457	148 431	-26%	-10%
Shipped	184 860	127 290	144 669	-22%	14%
Dry bulk (MT)	14 014 477	12 588 393	13 309 197	-5%	6%
Liquid bulk (MT)	3 615 686	2 575 117	2 686 110	-26%	4%
Breakbulk (MT)	606 783	786 072	511 646	-16%	-35%
Vehicles (Units)	63 198	61 495	55 905	-12%	-9%
Total cargo (excl. Vehicles)	**18 236 946**	**15 949 582**	**16 506 953**	**-9%**	**3%**

Source: TNPA, updated 14/05/2025.

Containers exported (**↑14%**), dry bulk (**↑6%**), and liquid bulk (**↑4%**) are all up versus last year, as is the total year-to-date bulk cargoes (**↑9%** – note *Figure 2*). In fact, the year-to-date bulk cargoes to April are at the highest level since 2020 and trail 2019 by only **↓6%**, so it is clear that some progress is being made. Unfortunately, for containers, the story is not similar, which is illustrated by the following year-to-date for containers to April:

Figure 6 – Year-to-date flows 2019-2025: containers, y/y (TEU millions)



Source: TNPA, updated 14/05/2025.

Containers are down versus last year (**↓2%**) and **↓4%** below 2019 levels. The current YTD is at least above 2023 and the pandemic-induced year 2020. However, the reality is that despite some green shoots in the container industry — notably the arrival of new equipment, improved stack fluidity at key terminals, and early signs of private sector collaboration — we remain a significant distance from full recovery and far from establishing a reliable springboard for sustained volume growth.

c. Summary of port operations

i. Weather and other delays

- Equipment challenges ensured operational disruptions at the Port of Cape Town.
- The main operational constraints in Durban proved to be continuous equipment breakdowns, adverse weather, and network challenges.

- Adverse weather, system challenges, and vacant berths mainly impacted operations at our Eastern Cape Ports.
- Unavailable marine equipment resulted in operational delays at the Port of Richards Bay.

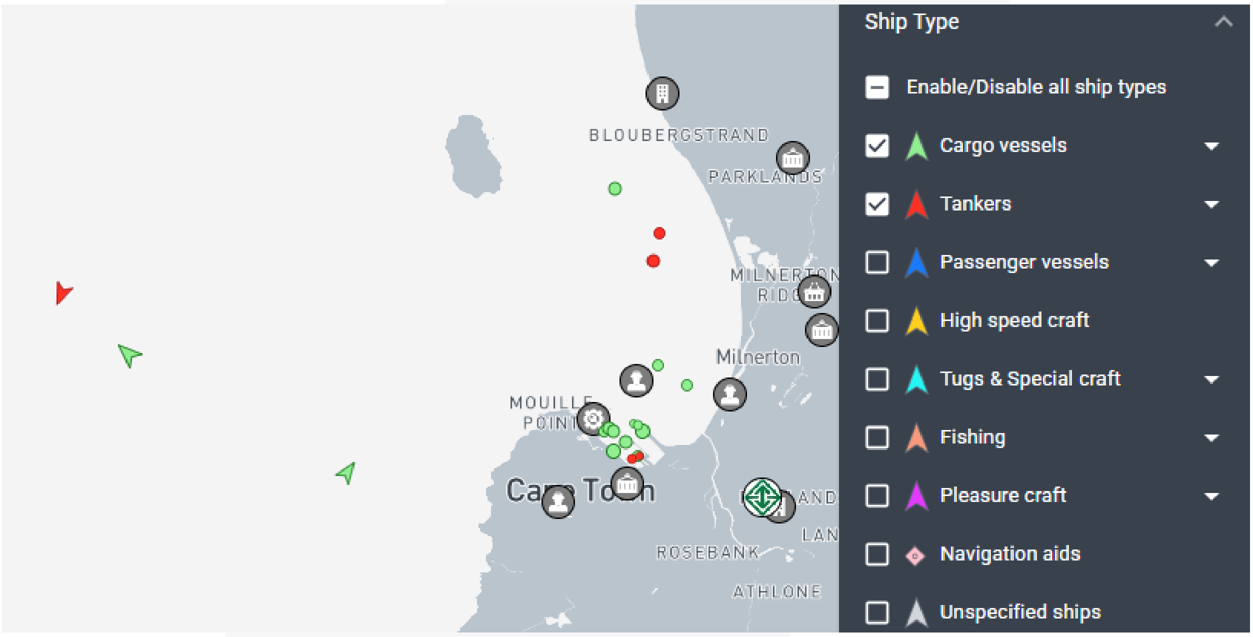
ii. Cape Town

On Thursday, CTCT recorded two vessels at berth and zero at anchor, as equipment challenges proved to be the primary operational constraint. On the landside, between Monday and Thursday, the terminal managed to service at least 5 021 trucks while handling approximately 29 rail units. On the waterside, the terminal executed approximately 1 230 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 19%**, **reefers at 39%**, and **empties at 30%**. Additionally, the terminal operated with **eight STS cranes**, **22 RTGs**, and **58 hauliers** towards the end of the week. The latest reports suggest that Crane LC3 remained out of commission and is only anticipated to return around 30 May. LC9 was taken out of commission for maintenance operations towards the end of the week.

On Thursday, CTMPT recorded three vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 6 705 tons across the quay on the waterside. On the landside, 78 trucks were processed during the same period. Stack occupancy was recorded at 10% for general cargo, 32% for reefers, and 0% for empties. Towards the end of the week, the terminal operated with three cranes and four straddle carriers.

Between 5 and 11 May, the FPT terminal handled seven vessels: three multi-cargo, one container vessel, one breakbulk, one vessel carrying steel, and one cement vessel. Berth occupancy during this period was recorded at 76%. The terminal planned to handle eight more vessels between 12 and 18 May, with another six vessels scheduled between 19 and 25 May. Adverse weather conditions and the late arrival of cargo mainly ensured operational constraints during this period.

Figure 7 – Cape Town vessel view (per vessel group)



Source: Marine Traffic. Updated 19/05/2025 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 **57%** for **GP containers** and **87%** for **reefers**. Between Monday and Thursday, the terminal executed at least 4 296 gate moves and 182 rail moves on the landside. The **average TTT** for the week was **~90 minutes** (**↑11%**, w/w) and an average **staging time** of **~69 minutes** (**↑19%**). Additionally, the terminal moved over 6 900 TEUs across the quay on the waterside during the same period. The terminal had **five STS cranes** and **14 RTGs** available towards the end of the week.

Pier 2 had three vessels on berth and zero at anchorage on Thursday, as equipment breakdowns and network challenges prevented optimal operational performance this week. Stack occupancy was recorded at **44%** for **GP containers** and **33%** for **reefers**. The terminal operated with **nine gangs** and moved over 10 900 containers across the quay between Monday and Thursday on the waterside. Approximately 10 296 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~77 minutes** (**↑7%**, w/w) and a staging time of **~69 minutes** (**↑47%**). Approximately 1 329 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **63** and **67** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **74%** during this period.

Notably, Pier 1 has recently brought 19 new rubber-tyred gantries (RTGs) into operation as of 21 May. This development is expected to yield meaningful improvements in container handling efficiency, reducing turnaround times and improving throughput reliability at the terminal.

The latest reports from Maersk stipulate that the Irenes Resolve will omit the Port of Durban due to undisclosed reasons. The vessel has no imports on board; however, all export cargo will be moved to the MI3 Mirador Express 521W.

Durban's MPT terminal recorded zero vessels at berth on Friday and one at outer anchorage. Stack occupancy for containers was recorded at 9%, with the breakbulk stack at 2%. In the preceding 24 hours, no volumes were handled on the waterside. On the landside, 65 container trucks and zero breakbulk RMTs were serviced. During this period, three cranes, nine reach stackers, seven forklifts, and 21 ERFs were in operation. The latest reports suggest that the part sourced from Australia for the repairs of the third crane arrived earlier than expected, resulting in the crane making a welcome return to operations.

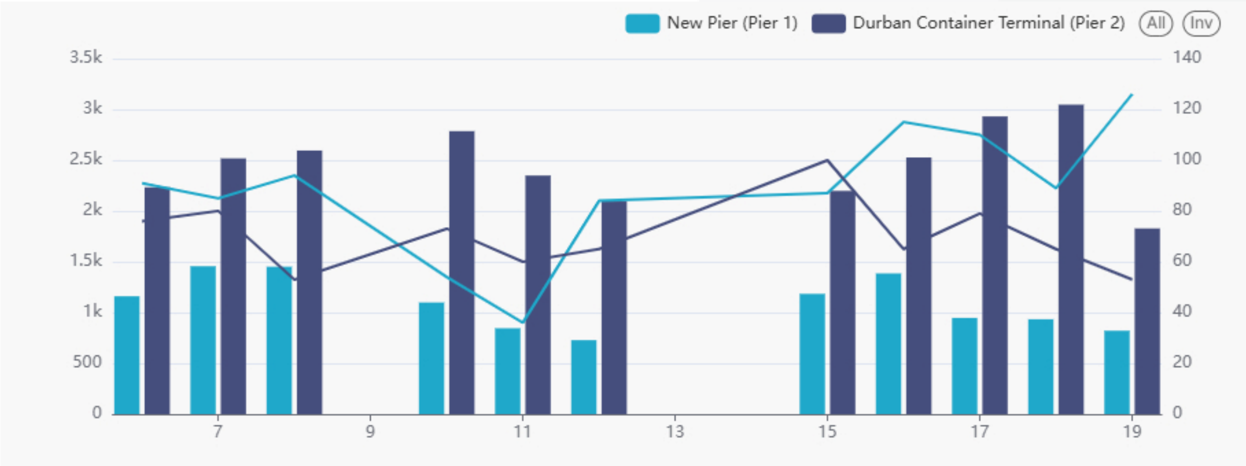
The Maydon Wharf MPT recorded zero vessels at berth or anchorage between Wednesday and Thursday. On the waterside, no volumes were handled, while 103 trucks, containing approximately 3 760 tons, were serviced on the landside. The agri-bulk facility recorded zero vessels at berth or anchor during the same period. The next vessel destined for the terminal is expected to arrive early in June.

On Wednesday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with none at anchorage. In the preceding 24 hours, the terminal handled 1 515 road- and 201 rail units on the landside and 1 318 on the waterside. Overall stack occupancy was 32%, 95% at Q&R, and 40% at G-berth. During this period, the terminal had 114 high-and-heavy (abnormal loads) on hand and managed to handle 57.

Lastly, prospective improvements to the access road leading to the Durban Container Terminal are set to begin in early June, as TNPA commences a six-month rehabilitation of Bayhead Road. The project, developed in collaboration with the eThekwini Metro and contracted parties, will focus on essential repairs, including pothole patching, tarmac replacement, and curb and stormwater drain restoration. Given the road's severely degraded condition, this urgent intervention is proceeding ahead of a separate feasibility study for potential road widening. To manage disruptions, stringent traffic control measures will confine truck movement within the port precinct, and regular weekly stakeholder engagements with TNPA are being arranged to monitor progress and address operational challenges.

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.

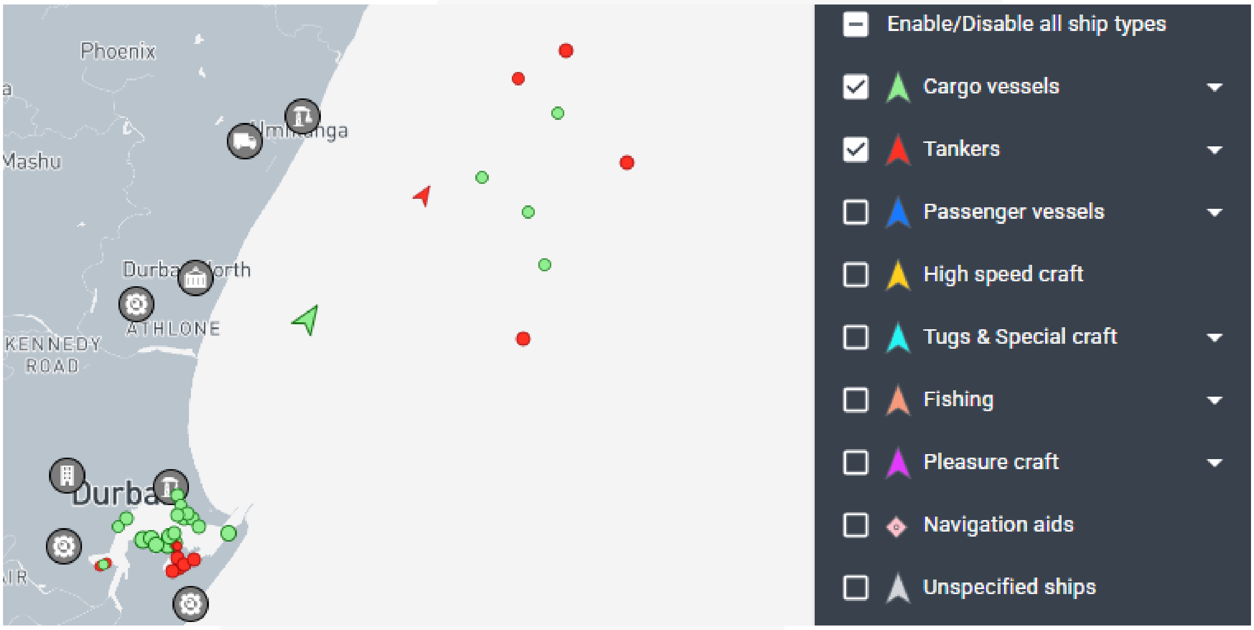
Figure 8 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 18/05/2025.

The queue of container vessels waiting outside Durban has stayed steady from last week. On Monday evening (19 May), **one** container vessel was waiting outside at anchorage for Pier 1, and **one** for Point 2. The queue of dry (**two**), liquid (**nine**), and breakbulk (**one**) vessels has also remained relatively similar from last week. The following snapshot shows the current status quo:

Figure 9 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 19/05/2025 at 14:00.

iv. Richards Bay

On Thursday, the Port of Richards Bay had 15 vessels at anchor and 15 on the berth, translating to nine vessels combined at DBT and MPT, four at RBCT, and another four at the liquid bulk terminal. Two tugs and one pilot boat operated for marine resources towards the end of the week. The helicopter remained out of commission for most of the week. Additionally, two vessel movements were delayed for approximately four hours due to the pilot boat being out of commission. The daily average for the week remained elevated are around **189 785 tons** (**↑7%**, w/w). An average of **18 trains** (down by one from last week) were serviced on the landside, slightly below the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded three vessels on berth and none at anchor, with three vessels drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. Stack occupancy figures were recorded at 29% for reefers, 42% for reefer ground slots, and 24% for the general stack. Despite having a vacant berth for around four hours during this period, the terminal handled approximately 2 757 TEUs and 214 reefers on the waterside. Approximately 232 trucks were processed on the landside at a TTT of ~48 minutes. Towards the end of the week, the terminal had six STS cranes, 23 RTGs, and 43 hauliers in service.

On Thursday, GCT had one vessel at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours before. During this period, 240 trucks were processed at a TTT of ~43 minutes on the landside, while 1 016 TEUs and 73 reefers were handled across the quay on the waterside. Stack occupancy was recorded at 62% for the general stack, 74% for reefers, and 71% for reefer ground slots.

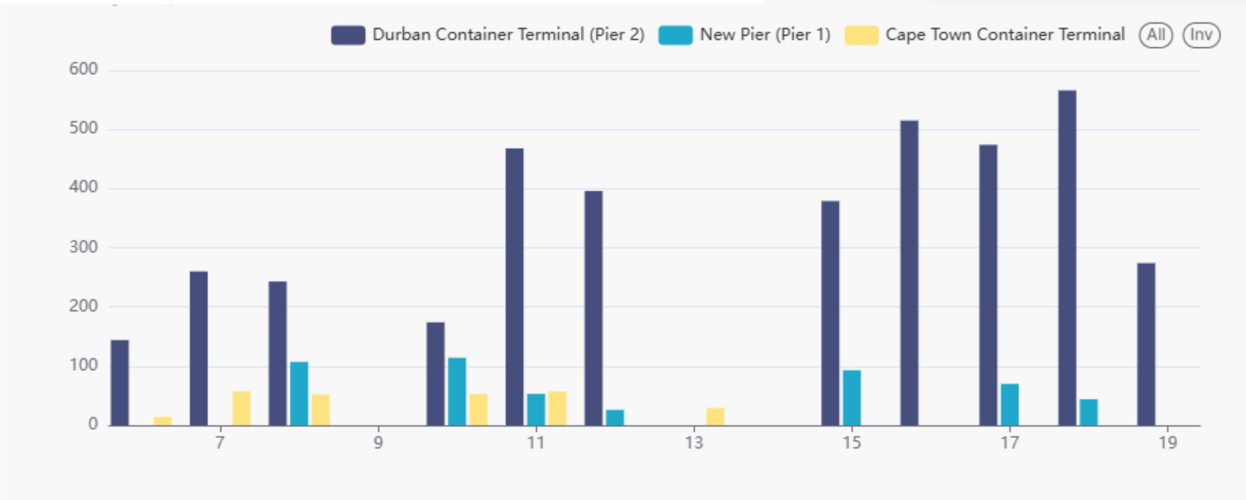
On Thursday, the Ro-Ro terminal had zero vessels on berth and none at outer anchorage. The terminal managed to handle 1 423 units on the waterside, resulting in a stack occupancy figure of 47%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest intermittent cable theft incidents remain prominent in the Capital Park area, resulting in continuous diesel hauling as a contingency measure to move cargo on the line. Further, towards the end of the week, DCT Pier 2 had 530 ConCor units on hand with a dwell time of 6 days and 293 over-border units with a dwell time of 89 days.

On the evening of 20–21 May, a substation outage at Danskraal near Ladysmith caused an 18-hour closure of the Container Corridor (NATCOR). The disruption affected rail cargo movement between Gauteng and Durban, further underscoring the need for urgent investment in electrical infrastructure resilience.

Figure 10 – TFR: Rail handled (Pier 1, Pier 2, and CTCT)



Source: Calculated using data from Transnet, 2024. Updated 18/05/2025.

In the last week (*12 to 18 May*), rail cargo on the ConCor line out of Durban was reported at **2 884** containers, down **↓4%** from the previous week's **3 041** containers.

vii. General

The latest reports from UNTU suggest that they did not receive a revised wage offer from Transnet, nor did they receive a facilitator's proposal from the CCMA Commissioners before the deadline on Monday, 19 May. Instead, UNTU was invited to an urgent S150 CCMA intervention process on Tuesday, 20 May. UNTU has made its stance clear that it will not negotiate any further and will issue a 48-hour notice of industrial action should a revised wage proposal not be received from Transnet.

2. Air Cargo Update

a. International air cargo

The following table shows the inbound and outbound air cargo flows to and from ORTIA for the week beginning 5 May. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *May 2024* averaged **~838 541 kg** daily.

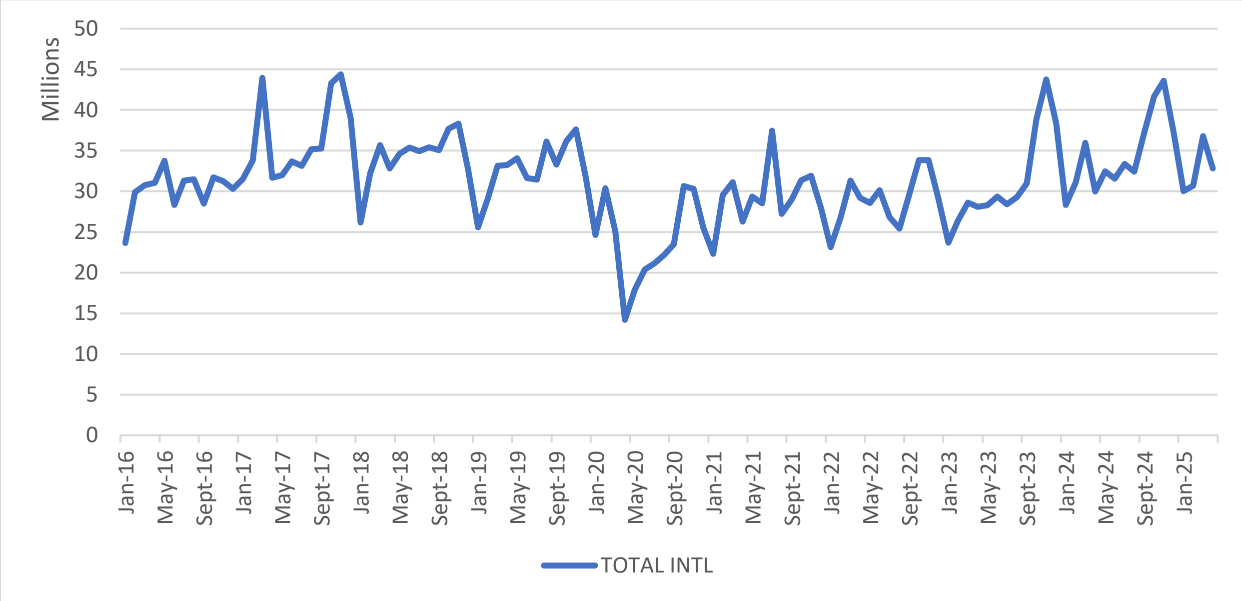
Table 6 – International inbound and outbound cargo from OR Tambo

Flows	05-May	06-May	07-May	08-May	09-May	10-May	11-May	Week
Volume inbound	447 933	191 815	305 985	323 271	256 311	236 502	1 763 650	**3 525 467**
Volume outbound	118 544	142 507	160 849	152 249	206 632	171 225	1 385 999	**2 338 005**
Total	**566 477**	**334 322**	**466 834**	**475 520**	**462 943**	**407 727**	**3 149 649**	**5 863 472**

Courtesy of ACOC. Updated: 18/05/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **503 638 kg** inbound (**↓3%**, w/w) and **334 001 kg** outbound (**↑17%**). After a couple of weeks of reduced air cargo throughput, the industry saw a good recovery, led by exports. Consequently, the current volumes have caught up to last year's levels (**↑1%**, y/y), but remain slightly below the comparative levels of pre-pandemic 2019 (**↓11%**). The following figure shows the international air cargo flows to and from South Africa (all airports) since the start of 2016:

Figure 11 – International cargo for all airports – volumes per month (kg millions)

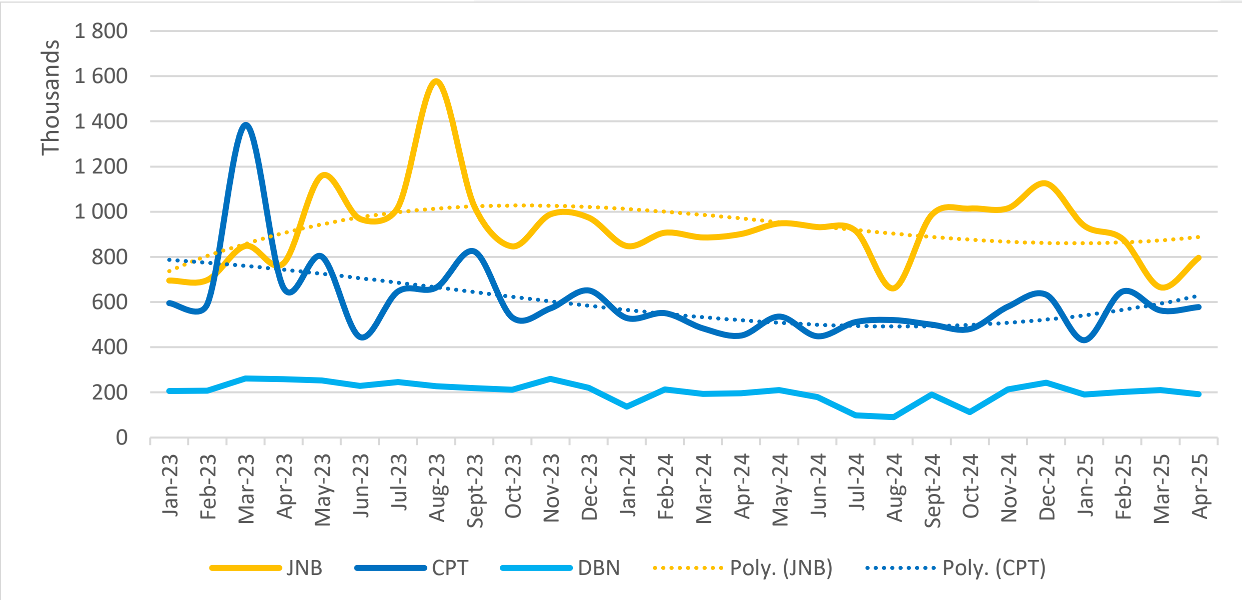


Calculated from ACOC. Updated: 18/05/2025.

b. Domestic air cargo

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

Figure 12 - Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 18/05/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*12 to 18 May*), cargo movements (road and rail) along the N4 corridor increased for rail and dropped only slightly for road. The following notes summarise the recent developments:

- Truck volumes at **1 420 HGVs per day** (**↓4%**, w/w).
- There was a slightly increased average of **2,8 hours**' (**↑22%**) worth of queuing time at the border, as the average processing time also increased – to around **2,5 hours** (**↑14%**) per crossing.
- The rail to Maputo increased to an average of **nine trains daily** (up by **two**).
- Sugar trains from Eswatini were stable at around **two trains a day**.
- Several noteworthy developments this week include the following:
    - The South African side of the corridor continues to deteriorate, with potholes pushing heavy vehicles into oncoming lanes, raising safety and congestion concerns.
    - Ongoing vandalism of solar lighting has created hazardous nighttime conditions. Criminals are exploiting the darkness to target stationary truck drivers.
    - Customs authorities at Ressano Garcia are maintaining their policy of escorting fuel tankers in convoys. While aimed at safety, the measure is significantly contributing to border congestion.

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

Table 7 – Lebombo border post update

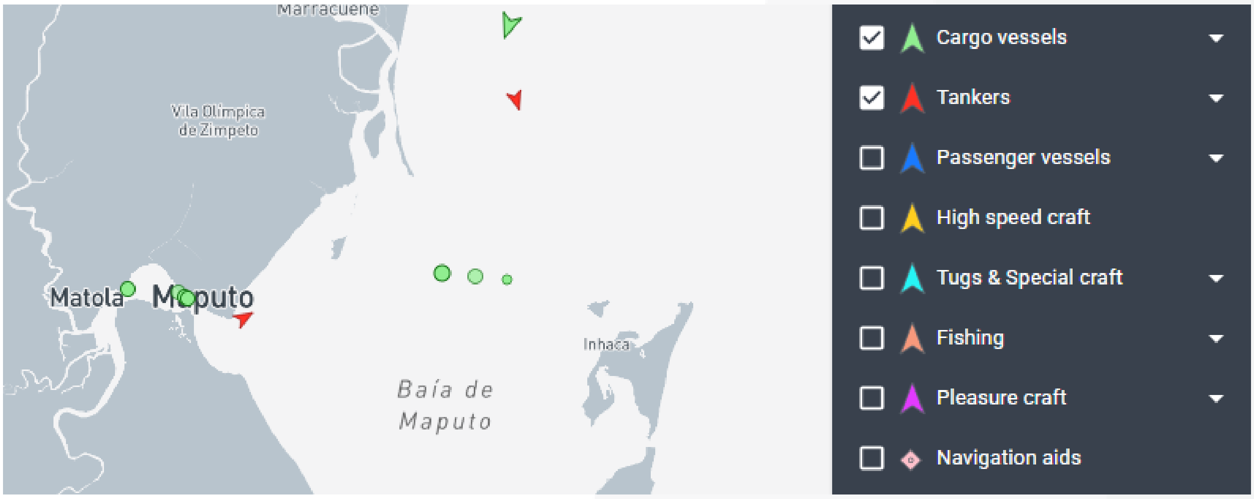
Date 06h00 Daily	Total Trucks Entering KM4	Total Trucks Exit KM4	Mineral Trucks	General Cargo (incl. critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Total Trucks inside KM4 staging	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo
Design Capacity	**1 500**	**1 500**	**1 200**	**200**	n/a	**50**	**50**	**2 000**	**20**	**10**	**6**	**4**
12-May-25	1 308	1 279	1 045	103	20	81	30	261	**12**	10	*	2
13-May-25	1 310	1 169	876	216	23	66	13	270	**10**	7	2	1
14-May-25	1 399	1 397	985	285	28	70	29	253	**10**	8	*	2
15-May-25	1 609	1 459	1 068	247	42	68	53	351	**14**	11	0	3
16-May-25	1 455	1 354	897	299	40	70	48	278	**7**	6	*	1
17-May-25	1 465	1 410	946	264	39	104	57	303	**11**	10	*	1
18-May-25	1 397	1 426	1 072	197	46	63	48	252	**10**	8	1	1
% of design capacity	**95%**	**90%**	**82%**	**115%**	**n/a**	**149%**	**79%**	**14%**	**53%**	**86%**	**17%**	**39%**
% change (d/d)	-5%	1%	13%	-25%	18%	-39%	-16%	-17%	-9%	-20%	**n/a**	0%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 18/05/2025.

** = not reported*

The following shows a snapshot of the vessels waiting for the Port of Maputo:

Figure 13 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 19/05/2025 at 14:00.

b. SADC cross-border and road freight delays

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

- Overall, the average queue times increased by around **an hour and a half** from last week, as transit times increased by around **an hour and three-quarters**.
- The median border crossing times at South African borders increased by **an hour and three-quarters**, averaging **~9,6 hrs** (**↑22%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**).

1. **South Africa (Bushbuckridge/Dwarsloop) on route to Mozambique:**
   a. Criminal activity escalated with roads being blocked using hijacked trucks.
   b. Two additional vehicles were seized near the new garage, worsening disruptions around the traffic light junction.
2. **South Africa (Freight SA Gatehouse):**
   a. Scheduled network cabinet maintenance on Tuesday, 13 May (01h00–04h00) temporarily halted traffic in both directions. Operations resumed thereafter.
3. **Zambia (near Livingstone):**
   a. An incident involving the confiscation of a Zimbabwean driver's license and keys at a checkpoint was reported.
   b. Following intervention by FESARTA, the items were returned, but the case underscores ongoing governance and procedural challenges.
4. **Zimbabwe:**
   a. A transition from metal discs to plastic driver's licenses is underway.
   b. Mandatory retesting will soon be introduced to verify driver identity and competence, potentially impacting freight operators employing Zimbabwean drivers.

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

Table 8 – 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	456	32,7	9,5	31,0	13 680	3 192
Beitbridge	Zimbabwe-SA	407	10,3	2,2	10,2	12 210	2 849
Groblersbrug	SA-Botswana	215	13,4	2,2	15,6	6 450	1 505
Martin's Drift	Botswana-SA	204	2,5	0,4	3,1	6 120	1 428
Kopfontein	SA-Botswana	216	5,7	1,1	5,4	6 480	1 512
Tlokweng	Botswana-SA	23	0,6	0,2	0,4	690	161
Vioolsdrift	SA-Namibia	30	4,1	1,6	4,1	900	210
Noordoewer	Namibia-SA	20	1,9	0,5	1,5	600	140
Nakop	SA-Namibia	30	4,5	1,0	4,3	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,4	1,0	600	140
Skilpadshek	SA-Botswana	208	4,7	1,3	4,4	6 240	1 456
Pioneer Gate	Botswana-SA	45	2,0	0,0	0,0	1 350	315
Lebombo	SA-Mozambique	1 483	2,8	0,5	2,5	44 490	10 381
Ressano Garcia	Mozambique-SA	1 343	1,5	0,2	1,3	40 290	9 401
Sum/Average		**4 700**	**6,3**	**1,5**	**6,1**	**141 000**	**32 900**

Source: TLC, FESARTA, & Crickmay, week ending 11/05/2025.

Table 9 – Delays summary – Corridor perspective

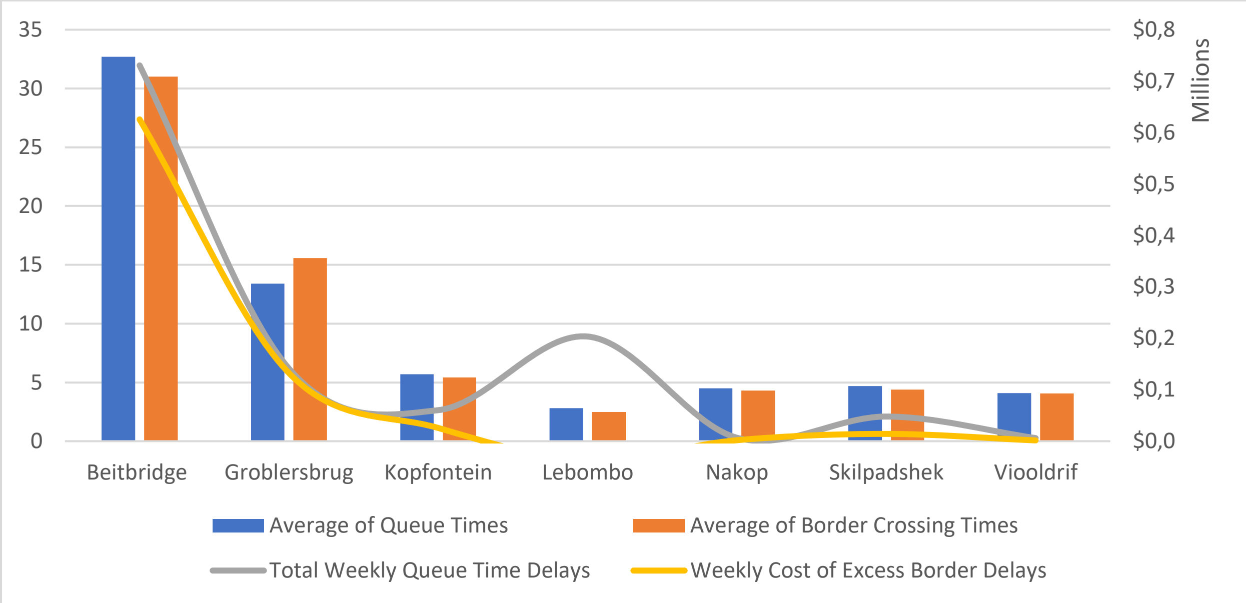
Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	14,2	4,3	13,9	9 600	2 240
Central Corridor	798	0,7	0,2	1,8	23 940	5 586
Dar Es Salaam Corridor	1 819	11,7	0,8	11,5	54 570	12 733
Maputo Corridor	2 826	2,2	0,3	1,9	84 780	19 782
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 593	9,2	1,4	9,2	107 790	25 151
Northern Corridor	2 817	0,5	0,1	1,2	92 520	21 588
Trans Caprivi Corridor	283	3,1	0,5	2,3	8 490	1 981
Trans Cunene Corridor	100	2,9	0,9	2,7	3 000	700
Trans Kalahari Corridor	116	26,2	5,3	26,2	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	**12 899**	**5,3**	**0,9**	**5,5**	**394 980**	**92 162**

Source: TLC, FESARTA, & Crickmay, week ending 11/05/2025.

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

[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.

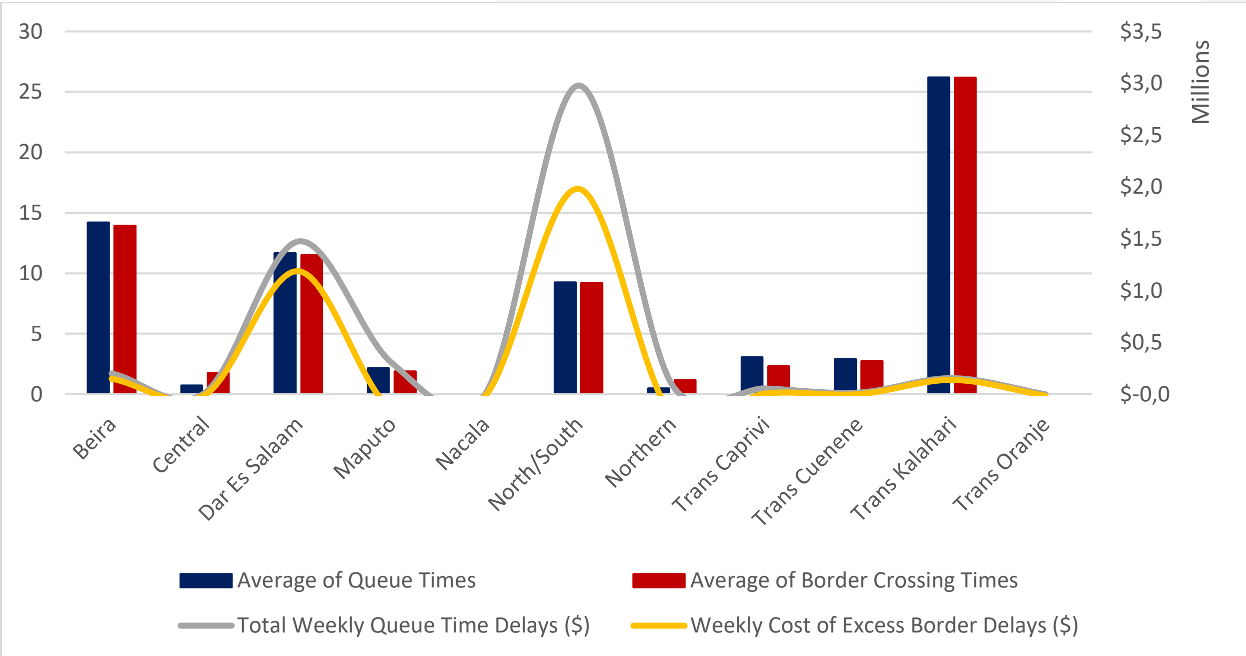
Figure 14 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 11/05/2025.

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

Figure 15 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 11/05/2025.

In summary, cross-border queue time averaged **~5,3 hours** (up by **~1,4 hours** from the previous week's **~3,9 hours**), indirectly costing the transport industry an estimated **$5,3 million** (**R96 million**). Furthermore, the week's average cross-border transit times hovered around **5,5 hours** (up by **~1,7 hours** from the **~3,8 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,1 million** (**R56 million**). As a result, the total indirect cost for the week amounts to an estimated **~$8,4 million** (**R152 million**, up by **~R49 million** or **↑48%** from **~R103 million** in the previous report).

4. International Update

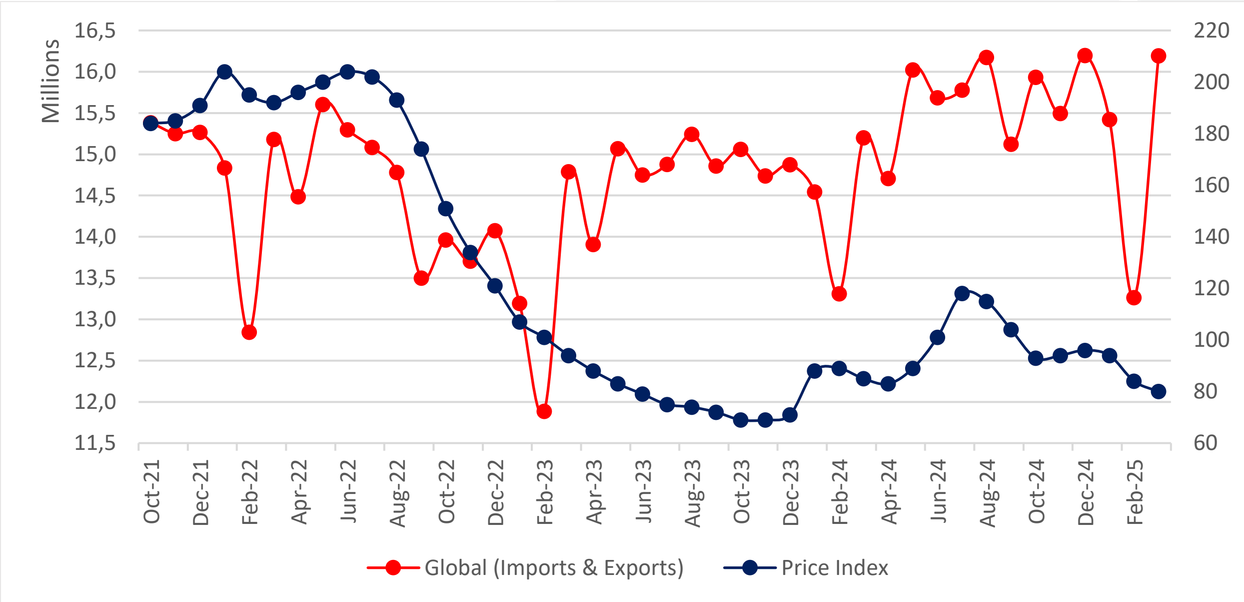
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry and **(b)** the global aviation industry.

a. Global shipping industry

i. Global container trade statistics – March

The latest container throughput figures for March from *Container Trade Statistics* (CTS) show that container volume had its typical cyclical rebound after the Chinese New Year, as global throughput to March increased by a substantial **↑22%** (m/m). Furthermore (and more indicative of the cyclical flow), throughput is up by **↑6,5%** (y/y) annually. All trade lanes experienced significant increases in February, with Far East exports the most significant at **↑29%** (m/m) and European imports at **↑27%**. Similar to the ongoing observations in the container spot rates, the global price index (dry and reefer combined) decreased in March by **↓4,8%** monthly and **↓5,9%** yearly. The following figure illustrates the global container throughput and price index since October 2021:

Figure 16 – Global Containerised Throughput (TEUs) and price index



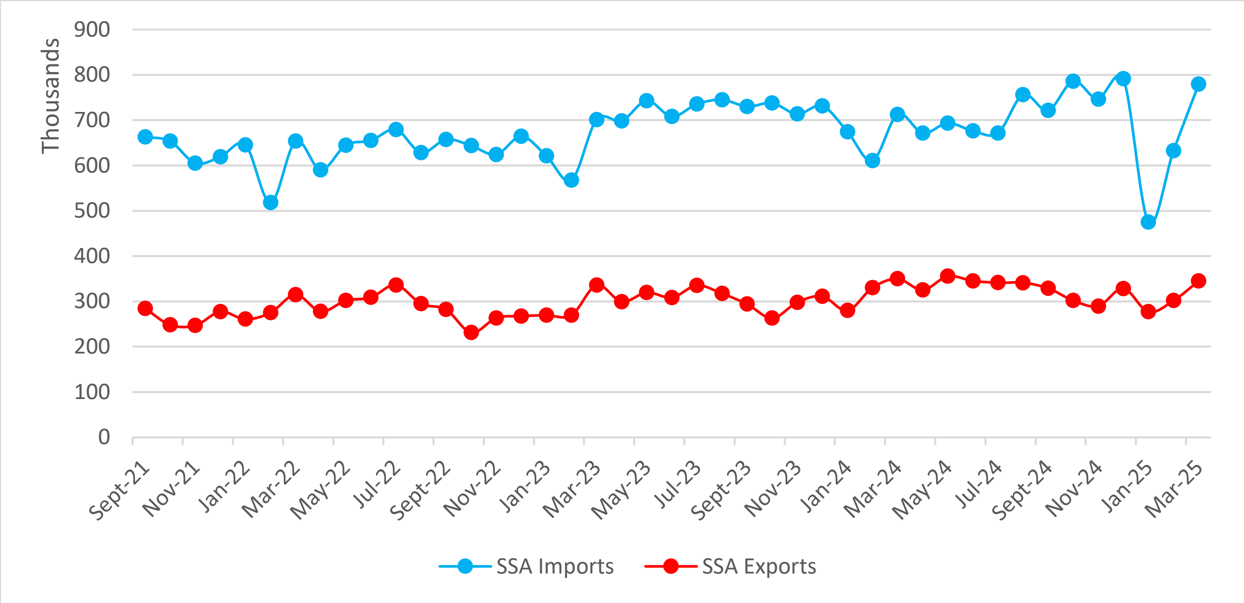
Source: Calculated from CTS

Container throughput in February reached **16,2 million TEUs** – only **5 000 containers** below the record level of December 2024, indicating the strong containerised demand despite some significant headwinds in the global market. Concerning current demand, the 90-day Sino-US tariff truce has triggered a substantial rebound in transpacific cargo bookings and a sharp rise in freight rates, with further rate increases scheduled from 1 June.[9]

The following figure shows Sub-Saharan African trade over the same period, with a **↑23%** (m/m) increase in containers imported, and a **↑14%** growth in containers exported:

[9] Linerlytica. 19/05/2025. Market Pulse – Week 20.

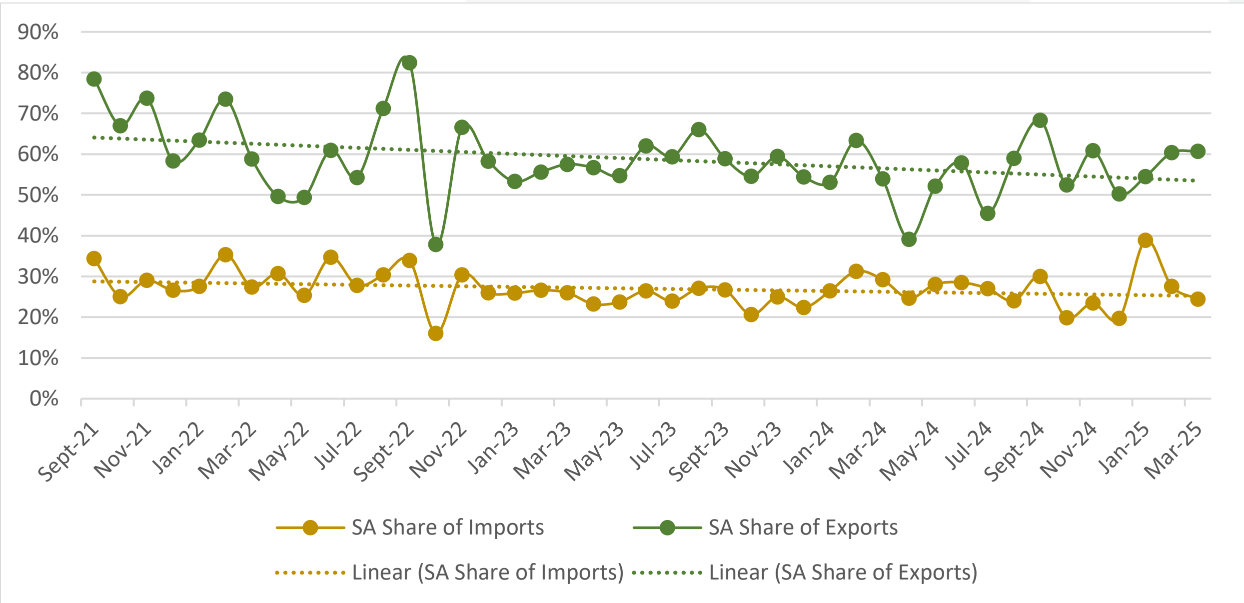
Figure 17 – Sub-Saharan Africa Containerised Throughput (TEUs)



Source: Calculated from [CTS]

Yearly SSA imports are also up (↑**9,3%**, y/y) – with exports down by ↓**1,4%** (y/y). When adding South Africa's share to SSA trade, we see a continuation of the general flow, as Transnet registered good cyclical throughput numbers in March (**399 631 TEUs**):

Figure 18 – South Africa's share in regional containerised throughput (% share)



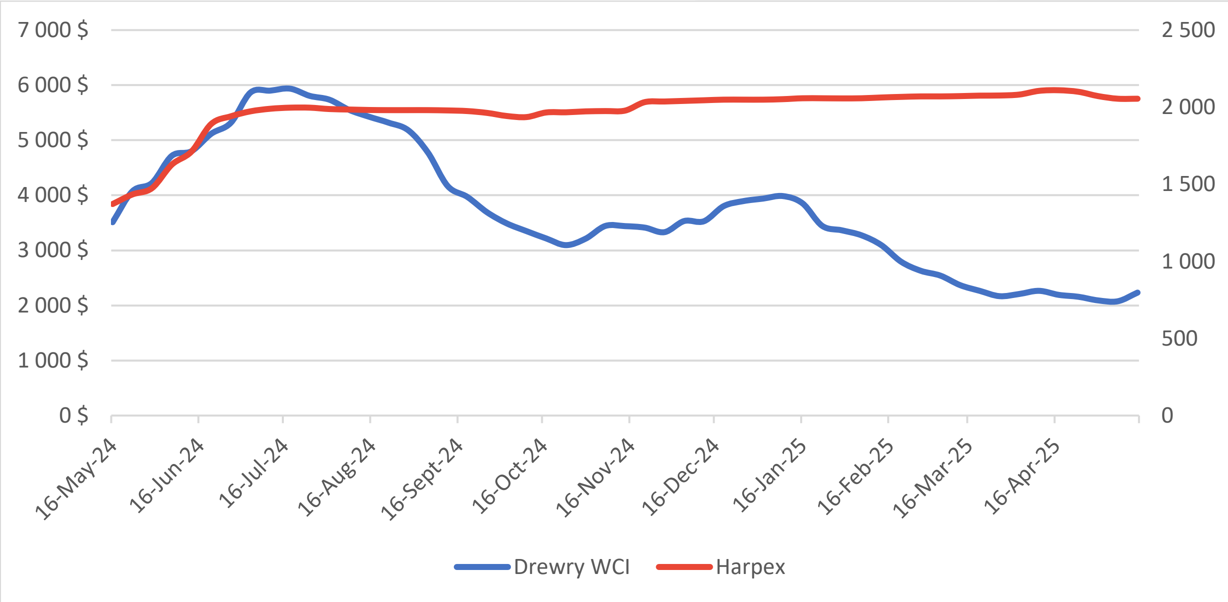
Source: Calculated from [CTS]

When measuring these, South Africa accounted for approximately **24%** of SSA imports and **61%** of SSA exports in March, according to TNPA figures. These respective shares are significantly less than the highs of **35%** in February 2022 for imports and **82%** in September 2022 for exports. Our weakened share of regional volumes underscores the systemic challenges still facing the network, particularly in establishing a sustainable springboard for future volume growth.

ii. Global freight rates and carrier profits

After four consecutive weeks of reductions, the Drewry's "*World Container Index*" again increased, as the index jumped by a significant **↓7,6%** (or **$157**) to **$2 233 per 40-ft container**[10]. Meanwhile, charter rates were stable, as the *Harper Petersen Index* (Harpex) traded around **2 055 points** (**no change**) on Friday.[11]

Figure 19 – World Container Index ($ per 40ft), and Harper-Petersen Index



Source: Calculated from Drewry and Harpex

As mentioned above, carriers are actively rerouting and redeploying vessels toward US routes to benefit from the tariff relief, with KMTC emerging as a new entrant on the trade lane.[12] This strategic shift is causing charter markets to tighten, as lines chase capacity to maximise the renewed demand. Analysts describe this as a "*perfect storm*" setup that could underpin stronger carrier earnings over the next two quarters. However, despite the momentum, the impact of structural uncertainties beyond the tariff window remains a watch point.

Nevertheless, Maersk and Hapag-Lloyd remain at the bottom of the carriers' EBIT margin league table for the 5th consecutive quarter with their operating performance continuing to lag behind all their main rivals. The two Gemini Cooperation partners' heavy reliance on contract cargo and relatively low exposure on the Transpacific market, coupled with their high operating cost base, has continued to weigh down on their financial performance.

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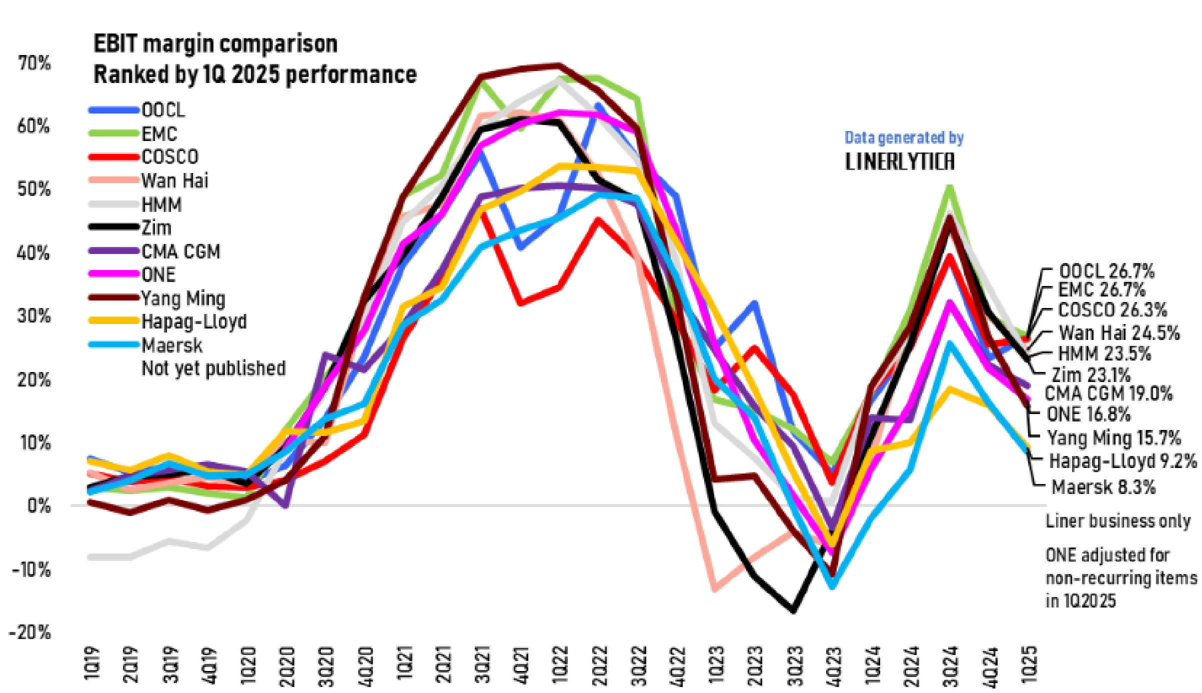
[10] Drewry. 22/05/2025. World Container Index.
[11] Harpex. 23/05/2025. Harper Petersen & Co Charter Rate Index.
[12] Linerlytica. 19/05/2025. Market Pulse – Week 20.

Figure 20 – Global carriers' EBIT margin (Q/Q, %)



Source: Linerlytica

b. Global air cargo industry

In the high-frequency metrics, World ACD data shows that the global air continues to weaken, with chargeable weight down ↓**1%** week-on-week and ↓**3%** on a two-week-over-two-week (2w/2w) basis. The drop in demand follows the end of the US *"de minimis"* exemption for Chinese imports under **$800**, effective 2 May. Sharp declines were particularly recorded in the Asia Pacific region (↓**8%**), Central and South America (↓**5%**), and China-US volumes (↓**10%**, w/w; and ↓**27%**, y/y).

Despite reduced demand, airfreight capacity contracted ↓2% globally over the same 2w/2w period. The Asia Pacific region led the contraction (↓**5%**), mainly due to Golden Week and public holidays, while Europe was the only region to show a capacity increase (↑**1%**).

Figure 21 – Regional changes in capacity, chargeable weight, and rates (weeks 2 to 5, % 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		-2%	-1%		-0%	+2%		+0%	+6%
Asia Pacific		-5%	-1%		-8%	+4%		-2%	-5%
C. & S. America		-1%	-6%		-5%	+2%		+2%	-3%
Europe		+1%	+2%		+2%	+1%		-1%	+1%
M. East & S. Asia		-1%	+2%		-1%	-3%		+0%	-13%
North America		-3%	-3%		+3%	-1%		+0%	+0%
Worldwide		-2%	-1%		-3%	+2%		-2%	-3%

Source: World ACD

Reflecting these trends, the global average airfreight rate fell to **$2,34 per kg**, down ↓**2%** (w/w) and 3% (y/y), marking the fourth consecutive weekly decline. Looking ahead, the 90-day suspension of elevated US tariffs could prompt renewed demand via air, although increased customs scrutiny for non-postal shipments may limit this.

ENDS[13]

[13]**ACKNOWLEDGEMENT:**

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