

COVID-19: Cargo movement update¹

Date: 1 April 2022

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 (containers)	22 487	24 640	47 127	18 525	19 990	38 515	↑22%
Air Cargo (tons)	4 739	2 811	7 550	4 820	2 987	7 806	↓3%

Monthly Snapshot

Figure 1 – Monthly⁴ cargo volume levels, year on year (100% = baseline)

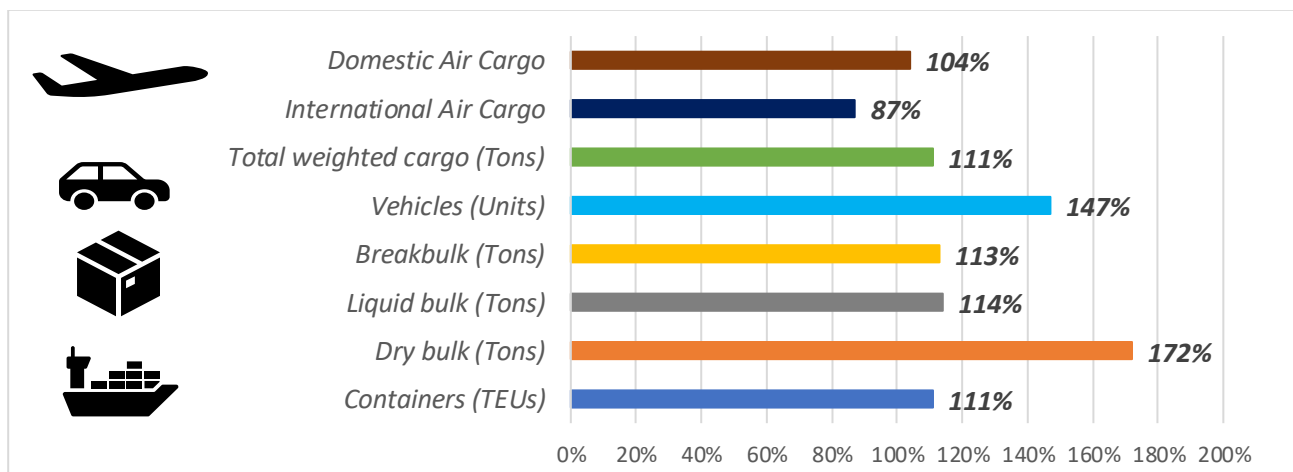
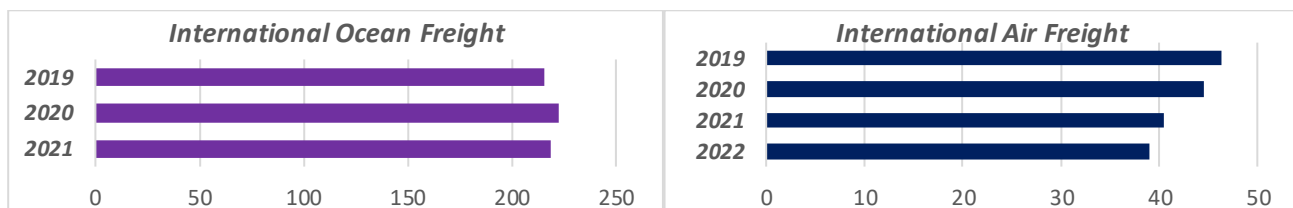


Figure 2 – Global year-to-date flows 2019-2022⁵: ocean, y/y (metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~6 732 containers** was handled per day, with **~6 738** projected for next week.
- Rail cargo handled out of Durban amounted to **3 063** containers, **↓18%** compared to last week.
- This week, cross-border queue times are **↓2,8 hours**, with transit times **↓3,4 hours** (see [below](#)).
- The "WCI" continued its decrease this week, with spot rates **↓3,8%** (or **\$319**) to **\$8 152** per 40-ft.
- Global container throughput increased by **↑4%** (y/y) above January 2021 to reach **138,8 points**.
- Liner schedule reliability improved by **↑4,0%** (m/m) to **34,4%**, with average late arrivals at **7,11 days**.

¹ This update contains a combined overview of air, sea, and road freight to and from South Africa in the last week. This report is the 80th update.

² 'Current' means the last 7 days' (a week's) worth of available data.

³ 'Previous' means the preceding 8-14 days' (a week's) worth of available data.

⁴ 'Monthly' means the last full month's worth of available data compared to the same month in the previous year. For Air, Feb versus Feb; for the rest: Jan & Feb versus Jan & Feb, but for Durban only. This delay originates from the fact that TPNA has not yet updated its website with the latest statistics.

⁵ For ocean, total Jan-Dec (2019-2021) cargo in metric tonnes, as reported by [Transnet](#) is used, while for air, Jan-Feb cargo to and from ORTIA is used.

Executive Summary

This update – *the 81st of its kind* – contains a consolidated overview of the South African supply chain and the current state of international trade. Newly reported COVID-19 infections increased slightly and averaged approximately **1 393** per day (**↑12%** from last week's average of **1 246**). South Africa has recorded **3,72 million**⁶ positive cases, with the recorded death breaching the unwanted **100 000-mark** this week (up by **100**). However, the true death toll may exceed **250 000** as the National Department of Health admits to possible under-reporting⁷. Globally, the case tally stands at **488 million** infected by COVID-19, with **6,14 million** deaths recorded. Around **11,28 billion** vaccine doses have been administered globally⁸, with our count at **33,71 million**.

This past week, port operations in Cape Town were crippled by the ongoing inclement weather conditions. Early in the week, waterside visibility was hampered due to fog, while vessels experienced ranging from Tuesday periodically until Friday. The newly installed shore tensioners at CTCT offered little relief due to the terminal being windbound, thus halting crane operations. Durban port, Pier 2, had a serious lack of cranes in operation, causing both waterside and landside congestion and resulting frustration. According to TPT, the terminal is working very hard to address the situation and has called in engineers to assist. Furthermore, with the expiry of harbour entry permits on Friday, various vessels and trucks were delayed significantly at Durban's Maydon Wharf terminal. Due to the severity of the problem, TNPA issued a communication that they would allow for a grace period of 1 month only for those port users that have not yet renewed their permits. On Friday, the industry was informed about a fire that broke out at NCT on Thursday at a substation close to the railhead. This affected cranes 1,2, and 3. TPT advised that they were still awaiting a root cause analysis.

In the global shipping industry, the headline this week was a marked increase in throughput volumes for January. However, with a two-month delay in reporting, this trend is largely expected to reverse in the coming months, especially with several known factors (including the Chinese lockdown and the Russia/Ukraine conflict) yet to show their impact. Fortunately, liner schedule reliability has improved over the same period, albeit nowhere near pre-pandemic expectations. At the same time, freight rates are coming down – slightly sooner than most shipping lines anticipated. Additional significant developments include **(1)** an update on the Shanghai lockdown, **(2)** a Liner pricing investigation underway in Africa and Korea, and **(3)** the charter market being severely debilitated to cope with industry cycles.

South Africa's international air cargo sector volumes decreased marginally this week (**↓3%**), with domestic air cargo also slightly down (**↓4%**). Internationally, IATA data on airlines show that the pandemic has created new opportunities for airlines, with an increase in the number of new airline registrations – especially in the cargo market. Last year saw as many as 57 new airline births (including 12 new cargo airlines), up 36% from 2019, as airlines saw the worst of the crisis passing. In other aviation news, **(1)** DHL is expanding North American operations, **(2)** cargo destined for Shanghai Pudong is being diverted during the city's lockdown, and **(3)** the use of passenger aircraft to fly cargo-only is expected to continue this year with the capacity crunch persisting.

Finally, this week marks precisely two years since we entered our first hard lockdown in concluding this edition. Unfortunately, not much positive change has occurred in the global supply chain. Indeed, the extended network remains disrupted after the outbreak of the COVID-19 pandemic. With planning uncertainty still ruling, the pressure on human resources having to operate in this environment remains extreme. Indeed, it isn't digitalisation or platforms that keep containers moving. It's the expert individuals and teams who must load and discharge every, as other modes of transport are often cancelled or rescheduled several times. Our industry is known for coming to the rescue of global supply chains; however, the need to collaborate with all stakeholders remains pressing.

⁶ Johns Hopkins, Coronavirus Resource Centre. [Coronavirus JHJU](#).

⁷ Cowan, K. 30/03/2022. [SA's Covid-19 death toll may exceed 250 000 as govt admits to possible under-reporting](#).

⁸ Our World in Data, Coronavirus (COVID-19) Vaccinations. [Our World in Data](#)