

Cargo Movement Update #201¹

Date: 30 August 2024

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)	22 949	22 809	45 758	20 992	26 492	47 484	↓4%
Air Cargo (tons)	3 803	2 487	6 290	3 779	2 292	6 071	↑4%

Monthly Snapshot

Figure 1 – Monthly⁴ cargo volume, year on year (% growth)

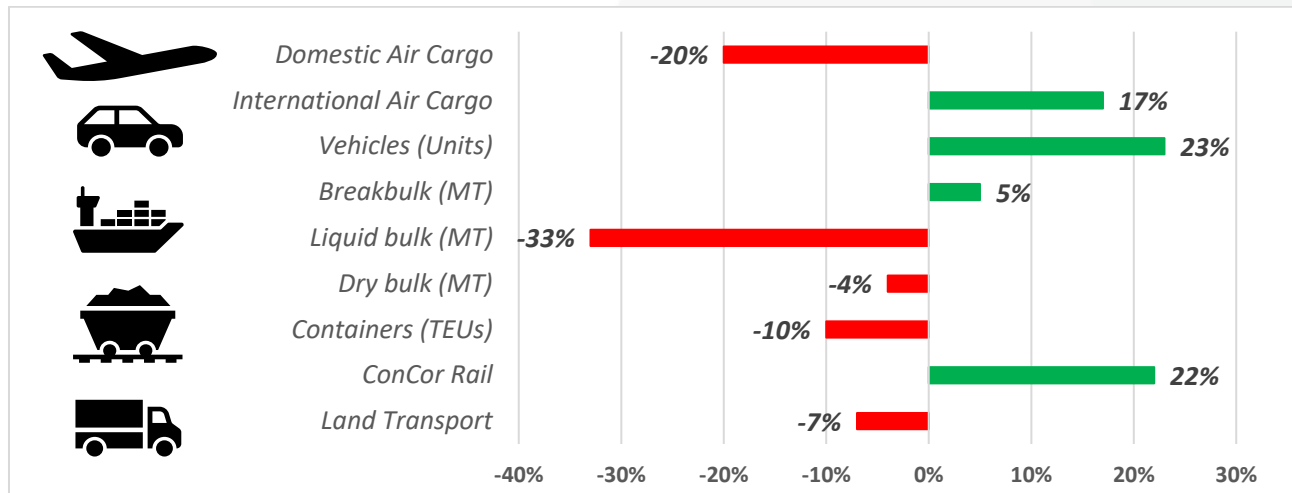
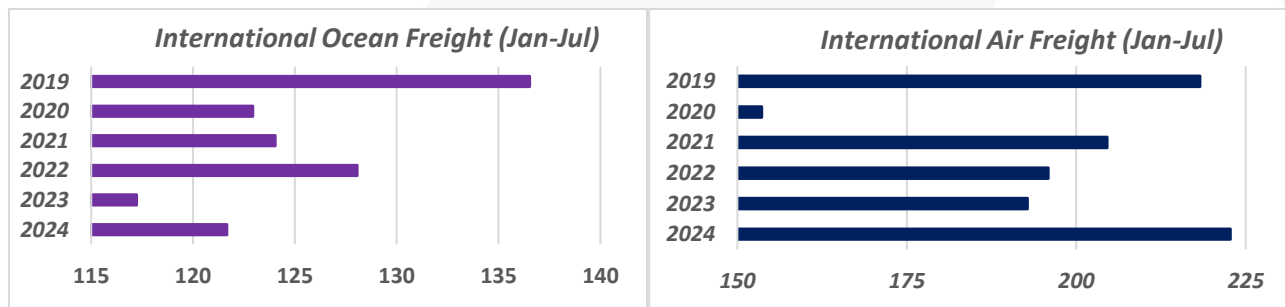


Figure 2 – Year-to-date flows 2019-2024⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~6 537 containers** was handled per day, with **~8 365 containers** projected for next week.
- Rail cargo handled out of Durban was reported at **2 976 containers**, up **↑2%** from last week.
- Cross-border queue: **no change**; transit: **↑1,2 hrs**; SA borders: **15,8 hrs (↑40%)**; SADC: **5,7 hrs (↑19%)**.
- Schedule reliability is down by **↓2,1% (m/m)** and **↓12% (y/y)**. Late arrivals are at **5,24 days**.
- Container rates dropped by **↓2,6% (\$138)** to **\$5 181/40ft** and are expected to drop **↓70%** by June 2025.
- Global air cargo for July shows a **↑9%** increase in capacity and a **↑7%** growth YTD.

¹ This update contains an overview of air, sea, and road freight to and from South Africa in the last week. This report is the 201th 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. All metrics: Jul vs Jul.

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 contains a consolidated overview of the South African logistics network and the current state of international trade. Operationally, another relatively low average of **6 537 containers** was handled per day, down from **6 783 containers** last week. Port operations were severely impacted by adverse weather conditions this week, accompanied by equipment breakdowns and shortages. Operations in Cape Town were severely disrupted this week due to strong winds, high swells, and vessel ranging, while inclement weather conditions accompanied by equipment breakdowns ensured operational delays in Durban. Over 50 operational hours were lost at our Eastern Cape Ports due to adverse weather and crane breakdowns. The Port of Richards Bay experienced an influx of trucks, leading to trucks being staged on public roads. The Fayston Farms eventually berthed in Durban this week after waiting at anchor for approximately 26 days. Furthermore, the annual shutdown on the ConCor started this week, as previously communicated.

This week, Drewry confirmed a **↑3,3%** month-on-month increase in the "*Global Container Port Throughput Index*" for June 2024, reaching **118,5 points**, marking a **↑5,5%** year-on-year growth. However, a **↓4,1%** decline is predicted for July, bringing the index down to **113,7 points**. Schedule reliability remained stable at **50%-55%** but still **↓12%** lower year-on-year. Average delays for late vessel arrivals improved slightly but remained above pre-pandemic levels. Maersk led in reliability at **54,6%**, while Wan Hai was the least reliable at **41,3%**. Despite a Canadian rail worker lockout, North American West Coast ports saw no significant congestion. Trade union ver.di rejected a collective agreement in Germany, raising concerns about potential disruptions. Container freight rates are expected to drop by over **70%** by June 2025, with futures indicating continuous declines and no rebound expected. The "*World Container Index*" fell for a sixth consecutive week; Charter rates remained unchanged, though up **↑85%** year-on-year. Other developments included **(1)** the Panama Canal Authority giving all clear, **(2)** average container ship sizes continuing to increase, **(3)** inconsistencies and limitations of ocean carriers' carbon emissions calculators, and **(4)** the Port of Beira hitting record cargo volumes.

The daily average of air cargo handled at ORTIA in the previous week amounted to **543 248 kg** inbound (**↑1%**, w/w) and **355 300 kg** outbound (**↑8%**), resulting in an average of **898 548 kg**. This week's increase means that the industry remains significantly up versus last year (**↑15%** versus August 2023) and still slightly down on pre-pandemic levels (**↓8%** versus August 2019) – but the YTD (*Figure 2 RH*) remains up, which is positive news for the industry. Elsewhere, Minister of Transport Barbara Creecy has directed ATNS to urgently resolve delays in auditing instrument flight procedures, emphasising safety and requiring a detailed plan within two weeks. Internationally, weekly figures show that in the last week of August 2024 (week 34), global air cargo tonnages rebounded by **↑5%**, primarily driven by an **↑11%** week-on-week increase from Asia Pacific, following a dip due to Typhoon Ampil in Japan. Rates remain stable, trading at **\$2,51 per kilogram**, up **↑12%** (y/y). In other air cargo news, foreign airlines have reacted strongly to an emergency security change by the US Transportation Security Administration (TSA) requiring additional details of shippers and consignees for airfreight.

In the regional cross-border road freight trade, the average queue times were **essentially unchanged** from last week, as the transit times increased by slightly more than **an hour** from last week. The median border crossing times at South African borders increased significantly by around **four and a half hours** (mainly because of slow movement through Groblersbrug), averaging **15,8 hrs** (**↑40%**, w/w) for the week. In contrast, the greater SADC region (excluding South African controlled) increased by slightly less than **an hour** and averaged **~5,7 hrs** (**↑19%**, w/w). On average, four SADC border posts last week took around a day to cross – Beitbridge, Chirundu OSBP, Groblersbrug, and Kasumbalesa (the worst affected, taking **around two days** to cross from either the Zambian or DRC sides). Other developments included **(1)** a change in DRC

border operating times, **(2)** military personnel deployed near Kolwezi, and **(3)** queuing at Skilpadshek and Groblersbrug because of the Mpox screening.

Ultimately, several indicators continue to breed optimism and are trending in the right direction; however, the rate of change of structural reforms continues to be criticised as being too slow. These include the uptake of private sector involvement in the industry (ports and rail), as well as securing alternative suppliers and strategic support, which are critical to mitigating CRRG-induced disruptions and ensuring the resilience of Transnet's locomotive fleet.⁶ Certainly, Transnet could alleviate its financial struggles and accelerate improvements by embracing private sector participation in its operations, particularly in rail and port services. Still, there appears to be resistance to fully committing to this path.⁷ The **R5-billion loan agreement** between Transnet and the New Development Bank (NDB) will aid in the short term; however, closer collaboration between Transnet's prospective private sector operators is essential to a revival path similar to Eskom. The industry must leverage collective resources, expertise, and passion to build an inclusive and prosperous South African trade, transport, and logistics industry.

⁶ Steyn, L. 24/08/2024. [Transnet train parts: Collaboration unlocks some critical spares, but still a way to go.](#)

⁷ Joffe, H. 30/08/2024. [HILARY JOFFE: Tardy Transnet plays catch-up as co-operation powers Eskom ahead.](#)

Contents

Weekly Snapshot	1
Monthly Snapshot.....	1
Key Notes	1
Executive Summary.....	2
Contents.....	4
1. Ports Update	5
a. Container flow overview.....	5
b. Summary of port operations.....	7
i. Weather and other delays	7
ii. Cape Town.....	7
iii. Durban	8
iv. Richards Bay	10
v. Eastern Cape ports.....	10
vi. Saldanha Bay	10
vii. Transnet Freight Rail (TFR).....	11
2. Air Update	12
a. International air cargo	12
b. Domestic air cargo	13
3. Road and Regional Update	13
a. Cross-border and road freight delays	13
4. International Update	16
a. Global shipping industry	16
i. Port Throughput Indices	16
ii. Schedule reliability.....	18
iii. Container market summary	18
iv. Global container freight – yearly outlook:.....	18
v. Further developments of note.....	20
b. Global air cargo industry.....	21

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 and projections for the next seven days.

Table 2 – Container Ports – Weekly flow reported for 24 to 30 August⁸

7-day flow reported (24/08/2024 – 30/08/2024)			
TERMINAL	NO. OF CONTAINERS ⁹ TO DISCHARGE (IMPORT)	NO. OF CONTAINERS TO LOAD (EXPORT)	CHANGE (w/w %)
DURBAN CONTAINER TERMINAL PIER 1:	4 378	4 490	↓4%
DURBAN CONTAINER TERMINAL PIER 2:	9 119	11 395	↓4%
CAPE TOWN CONTAINER TERMINAL:	2 358	4 013	↓17%
NGQURA CONTAINER TERMINAL:	6 102	1 983	↑9%
GQEBERHA CONTAINER TERMINAL:	992	928	↑6%
TOTAL:	22 949	22 809	↑4%

Source: Transnet, 2024. Updated 30/08/2024.

Table 3 – Container Ports – Weekly flow forecasted for 31 August to 6 September

7-day flow forecast (31/08/2024 – 06/09/2024)			
TERMINAL	NO. OF CONTAINERS TO DISCHARGE (IMPORT)	NO. OF CONTAINERS TO LOAD (EXPORT)	FORECAST VS ACTUAL (w/w %)
DURBAN CONTAINER TERMINAL PIER 1:	4 655	5 060	↑10%
DURBAN CONTAINER TERMINAL PIER 2:	10 636	12 041	↑11%
CAPE TOWN CONTAINER TERMINAL:	3 554	3 931	↑18%
NGQURA CONTAINER TERMINAL:	5 685	7 884	↑68%
GQEBERHA CONTAINER TERMINAL:	1 408	3 701	↑166%
TOTAL:	25 938	32 617	↑28%

Source: Transnet, 2024. Updated 30/08/2024.

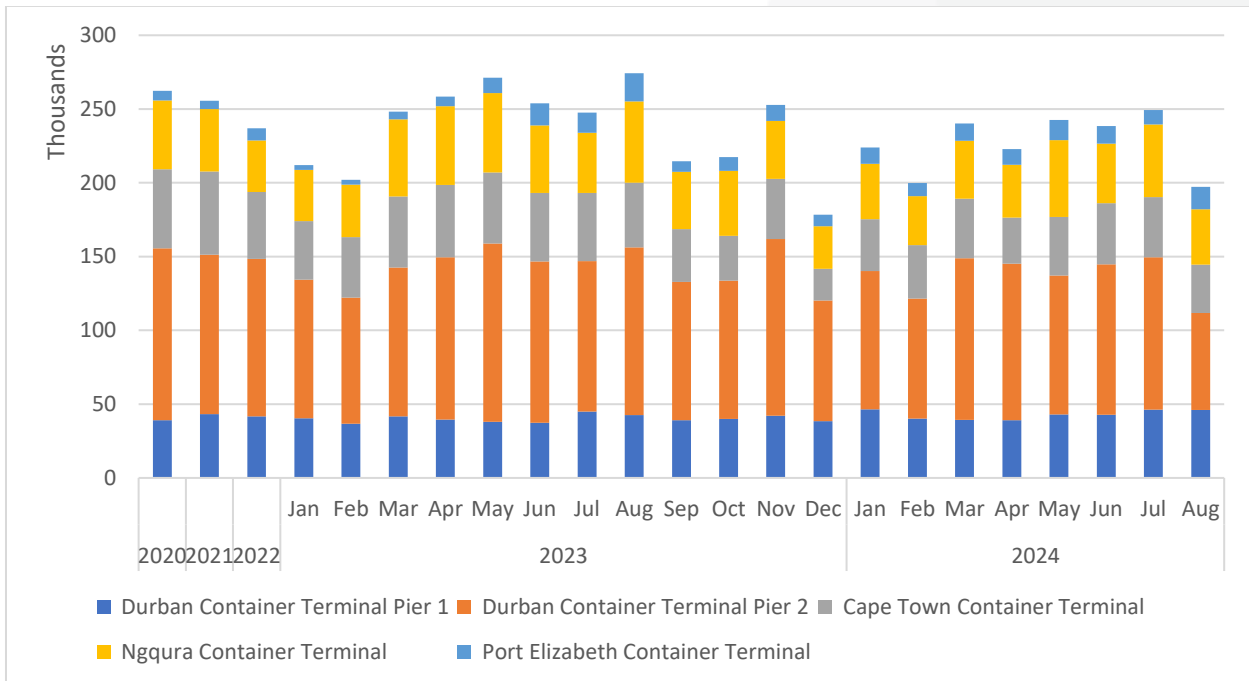
Another decreased average of **~6 537 containers (↓4%)** was handled per day for the last week (24 to 30 August, Table 2), compared to the projected average of **~7 873 containers (↓17% actual versus projected)** noted in last week's report. For the coming week, an increased average of **~8 365 containers (↑28%)** is predicted to be handled (31 August to 6 September, Table 3) in a best-case scenario. Port operations were severely impacted by adverse weather conditions this week, accompanied by equipment breakdowns and shortages.

The following figure illustrates the rolling *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our reporting began during the nationwide lockdown.

⁸ It remains important to note that a large percentage (approximately 35% according to the latest year-to-date TNPA figures) of containers is neither imported nor exported but rather consists of empties and transshipments.

⁹ As mentioned before, the measurement is noted as containers (20' and 40'). Incidentally, Transnet works on a ratio of approximately 1,4 TEUs per container, and this figure will probably increase as the shift towards more 40' containers continues. Elsewhere, the US uses 1,5 to 1,8, depending on the port. The privately operated FPT terminal in Cape Town works on 1,6.

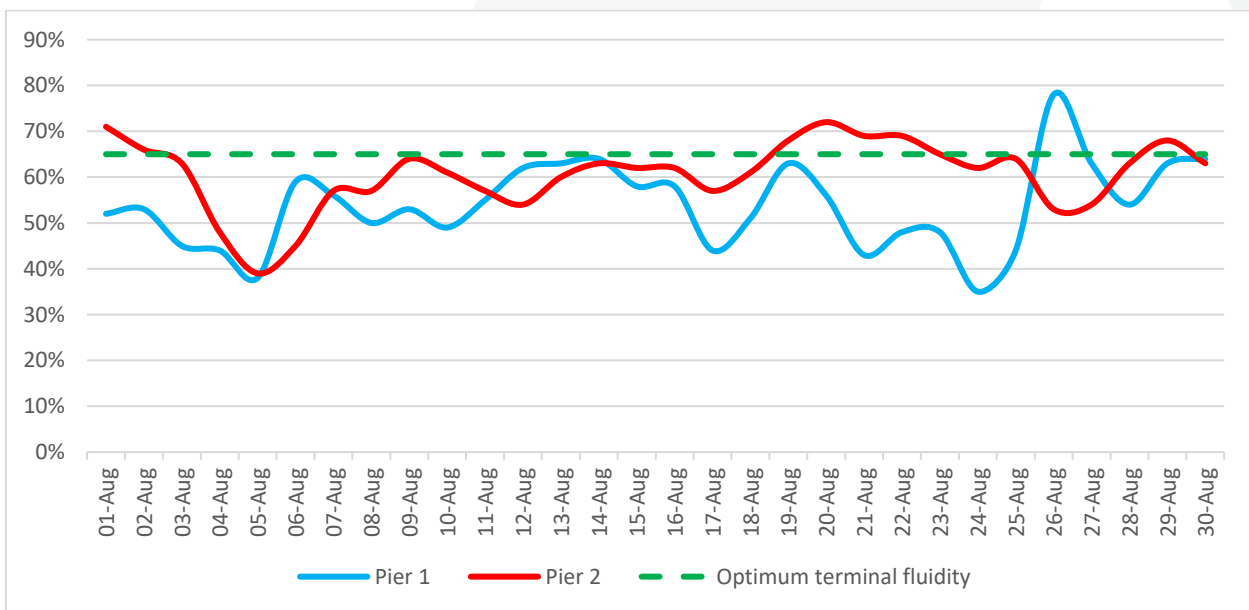
Figure 3 – Monthly flow reported for total container movement (containers April 2020 to present, m/m)



Source: Calculated using data from Transnet, 2024, and updated 30/08/2024.

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

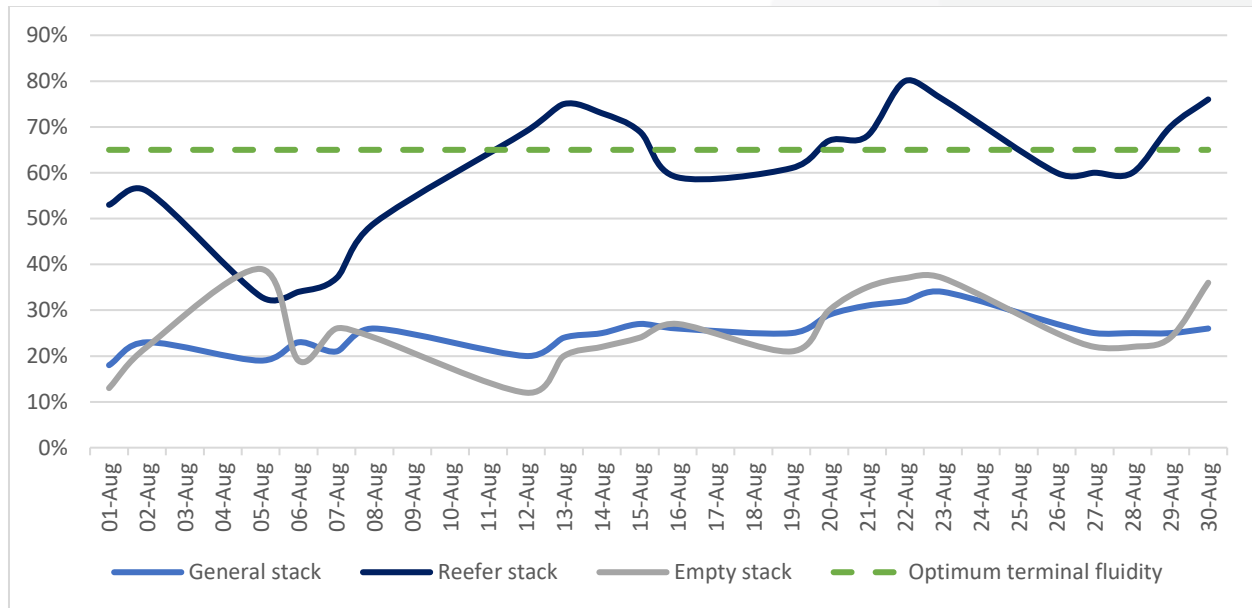
Figure 4 – Stack occupancy in DCT, general-purpose containers (1 August to present; a day on the day)



Source: Calculated using data from Transnet, 2024, and updated 30/08/2024.

The following figure shows daily stack occupancy in Cape Town over a similar period.

Figure 5 – Stack occupancy in CTCT, GP, reefer, and empty stack (1 August to present, day on day)



Source: Calculated using data from Transnet, 2024, and updated 30/08/2024.

b. Summary of port operations

i. Weather and other delays

- Operations in Cape Town were severely disrupted this week due to strong winds, high swells, and vessel ranging.
- Inclement weather conditions accompanied by equipment breakdowns ensured operational delays in Durban.
- More than 50 operational hours were lost at our Eastern Cape Ports due to adverse weather and crane breakdowns.
- Earlier this week, the Port of Richards Bay experienced an influx of trucks, leading to trucks being staged on public roads.

ii. Cape Town

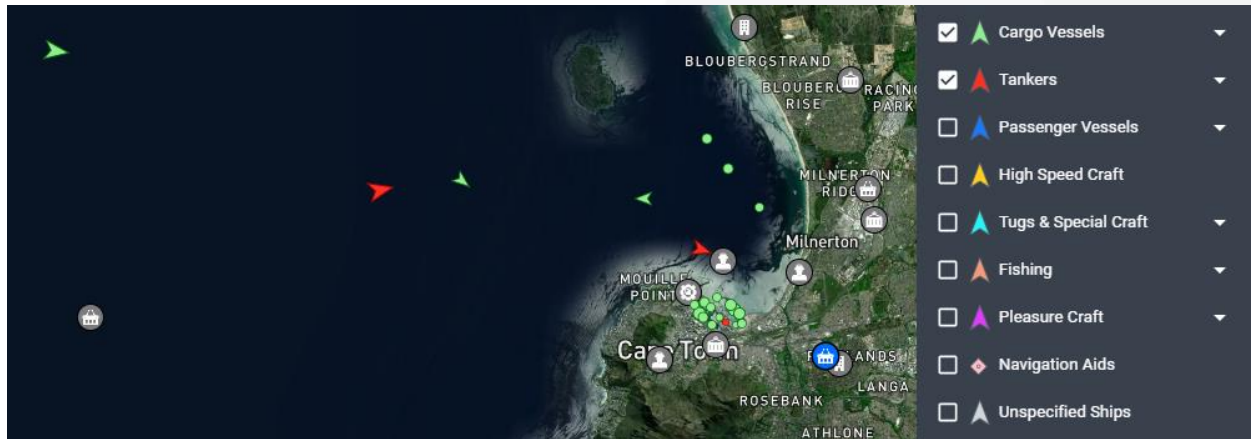
On Thursday, CTCT recorded three vessels at berth and one at anchor, as strong winds and vessel ranging hampered operational performance at the terminal throughout the week. Between Monday and Thursday, on the landside, the terminal managed to service 656 trucks while handling 193 rail units. On the waterside, the terminal executed approximately 1 386 container moves across the quay during the same period. Stack occupancy for GP containers was recorded at **25%**, reefers at **70%**, and empties at **24%**. Additionally, the terminal operated with **seven STS cranes** (a significant improvement on last week), **22 RTGs**, and **55 hauliers** towards the end of the week. Crane LC6 returned to service on Thursday; however, Crane LC3 remains out of commission with no ETR available yet. LC4 was also taken out of service for maintenance but is anticipated to return to operations before the weekend.

On Thursday, CTMPT recorded one berthed vessel and one at anchor. In the preceding 24 hours, the terminal managed to move 3 152 tons across the quay despite conceding more than seven operational hours to rain. On the landside, 263 trucks were processed. Stack occupancy during this period was recorded at **53%** for general cargo, **52%** for reefers, and **11%** for empties. Towards the end of the week, the terminal had **two cranes** and **three spreaders** in service, as load tests were still being performed on the third crane.

The FPT terminal serviced nine vessels from 19 to 25 August 2024: four multi-purpose, one container, one layby, and three breakbulk vessels. Berth occupancy during this period was recorded at 68%. FPT planned to handle nine vessels between 26 August and 01 September, with another 11 scheduled between 02 and 08 September. Rain, accompanied by the late arrival of transporters, accounted for most delays at the terminal this week.

At midday on Friday, there were three container vessels at inner anchorage in Cape Town, with the following snapshot of the port and vessels waiting to berth:

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



Source: Marine Traffic. Updated 30/08/2024 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, operated by five gangs, and four vessels at anchor. Stack occupancy was **64% for GP containers** and **85% for reefers**. Between Monday and Thursday, the terminal executed **3 428 gate moves** on the landside with an average staging time of **~53 minutes** throughout the week. Additionally, the terminal moved approximately **6 466 TEUs** across the quay on the waterside during the same period. Earlier this week, there was an intoxicated driver at the terminal. Subsequently, the truck was de-registered, and the driver was handed over to SAPS after being banned from the terminal. Both TPT and TNPA will not tolerate any behaviour of this nature.

Pier 2 had four vessels on berth and six at anchorage on Thursday, as adverse weather and equipment breakdowns prohibited optimal operational performance this week. Stack occupancy was recorded at **68%** for GP containers and **89%** for reefers. The terminal operated with **nine gangs** and moved approximately **12 126 containers** across the quay between Monday and Thursday on the waterside. During the same period, there were approximately **9 578 gate moves** on the landside, with an average staging time of **~88 minutes** throughout the week. Additionally, approximately 1 673 units were moved by rail during the same period, despite the annual shutdown on the ConCor starting this week. The number of available straddle carriers fluctuated between **49** and **53** this week.

After waiting at anchor for approximately 26 days, the *Fayston Farms* finally berthed this week. The main reason for its prolonged time at anchor is the equipment challenges experienced at North Quay.

Durban's MPT terminal recorded three vessels at berth on Thursday and one at outer anchorage. Stack occupancy for containers was recorded at 57%, with the breakbulk stack sitting very low at 12%. In the preceding 24 hours, the terminal managed to handle 349 containers and 3 173 tons of breakbulk on the waterside. On the landside, 271 container trucks, seven rail units, and 77 breakbulk RMTs were serviced.

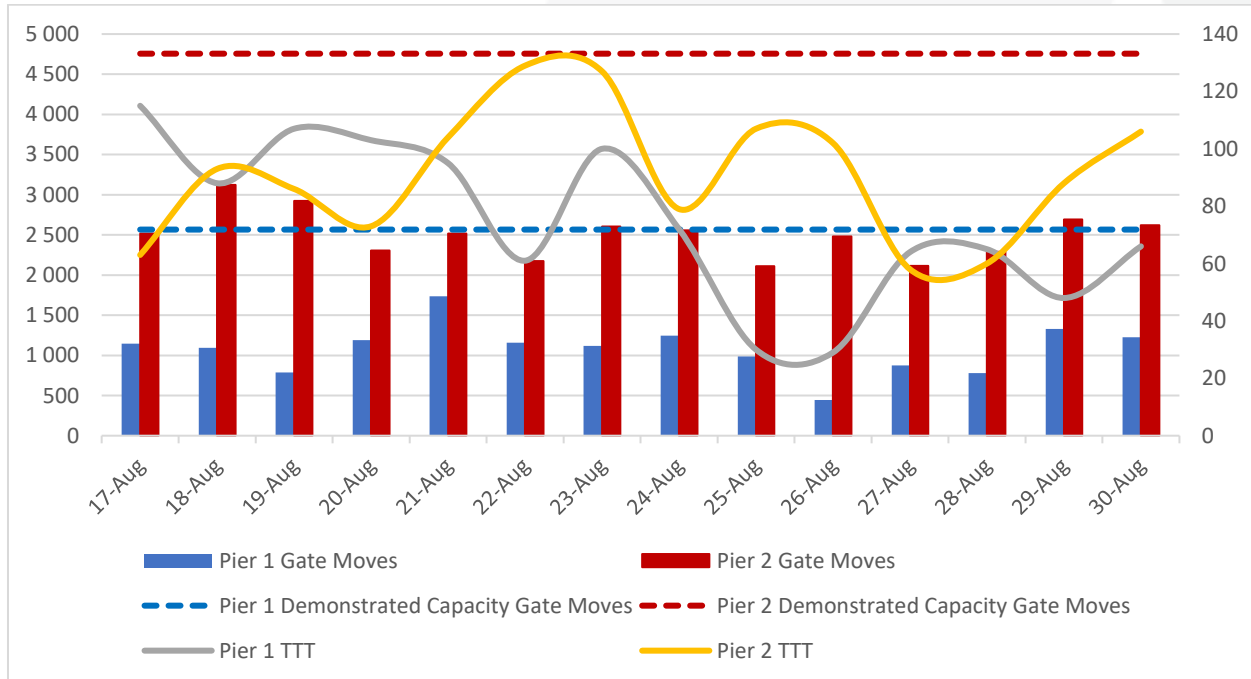
Towards the end of the week, three cranes, 11 reach stackers, one empty handler, eight forklifts, and 17 ERFs were in operation. Crane 03 remains on an extended outage, with Liebherr confirming a structural failure on the boom. No ETR is available yet.

On Friday, Maydon Wharf MPT recorded one vessel at berth but zero at anchor. In the preceding 24 hours, the terminal managed to handle 7 595 tons on the waterside despite experiencing rain delays. On the landside, the terminal managed to service 52 RMTs, conveying approximately 1 727 tons. No volumes were handled at the Agri-bulk facility this week, as the next vessel is anticipated to arrive around the end of September.

On Thursday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with none at anchorage. In the prior 24 hours, the terminal handled 438 road and 244 rail units on the landside while handling 1 146 units on the waterside. Overall stack occupancy was 21% (Exports: 71%, Imports: 23%, Transshipments: 6%), 10% at Q&R, and 10% at G-berth. During this period, the terminal had 132 high-and-heavy (abnormal loads) on hand and managed to handle 30.

The following figure summarises the performance of Durban's container terminals for the last two weeks, focusing on gate moves and time spent in the terminals.

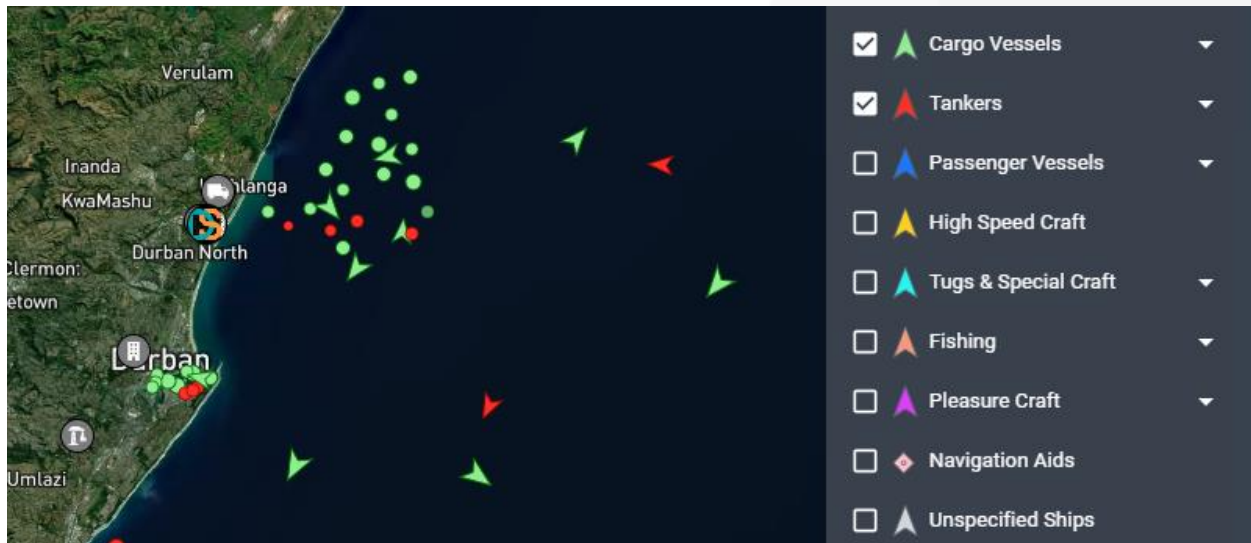
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 30/08/2024.

A queue of container vessels waiting outside Durban has built up and remains. At midday on Friday, six vessels were waiting for Pier 2, four for Pier 1, and two for Point terminal, with a current estimation of **at least nine additional days added to the schedules**. The following is a snapshot of the port and vessels waiting to berth:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 30/08/2024 at 14:00.

iv. Richards Bay

On Thursday, Richards Bay recorded 18 vessels at anchor and 14 on the berth, translating to four vessels at DBT, six at MPT, three at RBCT, and one at the liquid-bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources. During the same period, the coal terminal had seven vessels at anchor and three at berth while handling 165 763 tons on the waterside. On the landside, 15 trains were serviced, against the target of 22. Additionally, the Port experienced an influx of trucks earlier this week, leading to trucks being staged on public roads as the terminal could not process all the trucks quickly enough.

v. Eastern Cape ports

On Thursday, NCT recorded one vessel on berth and two at anchor as vessels went to seek shelter from the adverse weather during the week. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation in the previous 24 hours. Stack occupancy figures were recorded at 68% for reefers, 85% for reefer ground slots, and 49% for the general stack. Despite conceding over 50 operational hours to adverse weather and crane breakdowns this week, the terminal handled 247 TEUs on the waterside between Wednesday and Thursday. On the landside, 63 trucks were processed at a truck turnaround time of ~28 minutes. Towards the end of the week, the terminal had six STS cranes and 23 RTGs in service.

On Wednesday, GCT recorded 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 preceding 24 hours. On the waterside, 54 TEUs and 19 reefers were handled across the quay, while 144 trucks were processed at a truck turnaround time of ~18 minutes. Stack occupancy figures were recorded at 91% for reefers, 98% for reefer ground slots, and 46% for the general stack. The second tug returned to operations at the start of the week, while the terminal experienced extensive weather-related delays. Towards the end of the week, the terminal had one crane, one mobile harbour crane, and ten straddles in service.

vi. Saldanha Bay

On Thursday, the iron ore terminal had one vessel at anchorage and one on the berth, while the multi-purpose terminal had two vessels at anchor and two at berth.

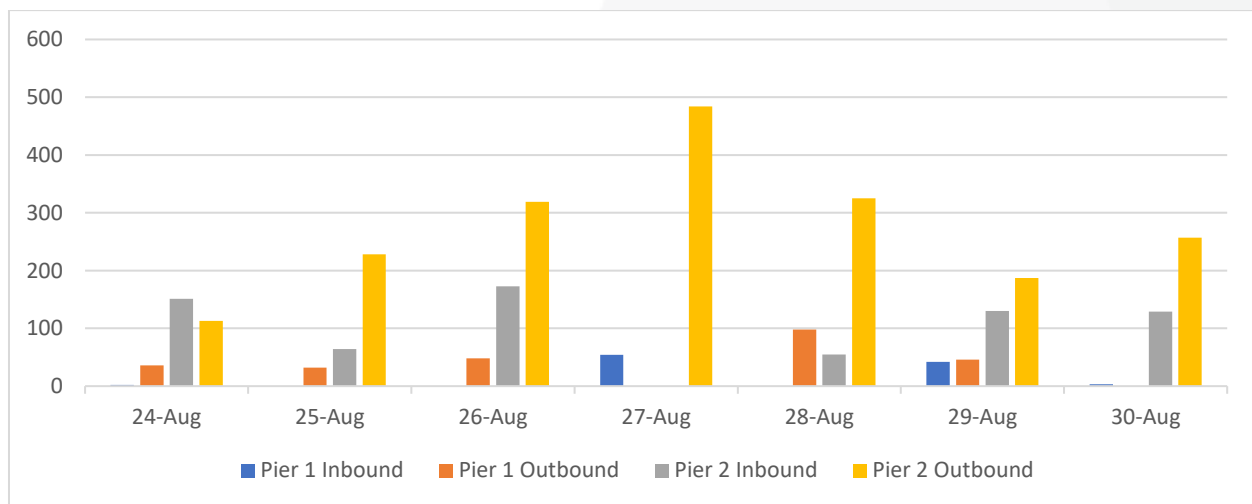
vii. Transnet Freight Rail (TFR)

The annual shutdown on the ConCor started this week, as previously communicated. However, a single-line operation was permitted until Thursday, when two container trains ran. The line will be shut entirely between 01 and 05 September. Towards the end of the week, DCT Pier 2 had 93 ConCor units on hand with a dwell time of 36 hours and 53 over-border units with 11 days. Rail containers on hand across the port system were reported as follows: DRT: 63, Pier 1: 25, Pier 2: 191, CTCT: 65.

Grindrod Limited has returned 13 locomotives from Sierra Leone to South Africa after successfully hauling over **18 million tonnes of iron ore** over three years.¹⁰ The company emphasised the importance of rail in their integrated logistics strategy, focusing on partnerships and growth opportunities within the SADC and East Africa regions.

The following figures show the number of containers handled on the Container Corridor this week:

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



Source: Calculated using data from Transnet, 2024. Updated 30/08/2024.

In the last week (24 to 30 August), rail cargo handled out of Durban was reported at **2 915** containers, up by **↑2%** from the previous week's **2 915** containers.

Lastly, the rate of change in structural reforms continues to be criticised as needing to be faster, especially in the rail sector.¹¹ Several actions are essential for structural reforms in South Africa's rail industry, particularly concerning locomotives, rolling stock, and open access. First, Transnet must prioritise securing alternative component suppliers free from CRRC's influence. Strategic leadership and government departments must offer robust support, addressing funding gaps and ensuring urgent action, particularly in reverse engineering efforts. Leveraging Transnet Engineering's existing control systems and the TransAfrica Locomotive's capabilities could mitigate the impact of CRRC's supply chain disruptions. Finally, a re-evaluation of procurement strategies and financial commitments is crucial to prevent further crippling of the fleet and ensure operational resilience.

¹⁰ FTW. 28/08/2024. [Grindrod's locomotives arrive at Port of Durban.](#)

¹¹ Joffe, H. 30/08/2024. [HILARY JOFFE: Tardy Transnet plays catch-up as co-operation powers Eskom ahead.](#)

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 19 August. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in August 2023 averaged ~780 820 kg per day.

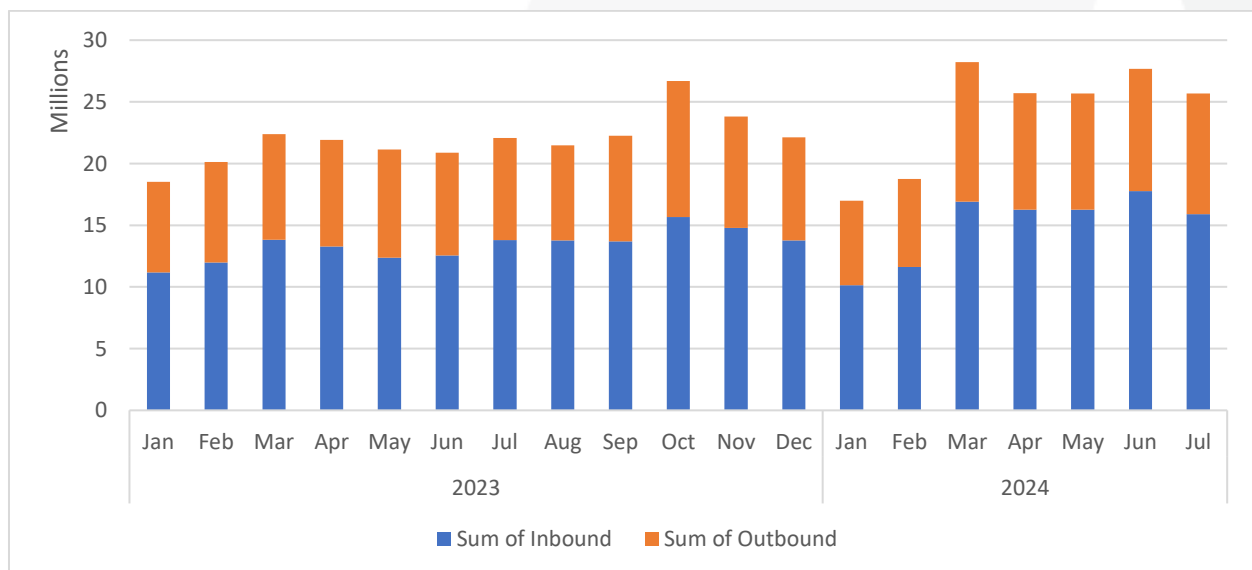
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	19-Aug	20-Aug	21-Aug	22-Aug	23-Aug	24-Aug	25-Aug	Week
Volume inbound	476 205	201 727	373 552	216 474	464 748	321 863	1 748 166	3 802 735
Volume outbound	159 906	202 707	192 985	210 436	250 592	256 082	1 214 391	2 487 099
Total	636 111	404 434	566 537	426 910	715 340	577 945	2 962 557	6 289 834

Courtesy of ACOC. Updated: 28/08/2024.

The daily average of air cargo handled at ORTIA in the previous week amounted to **543 248 kg** inbound (↑1%, w/w) and **355 300 kg** outbound (↑8%), resulting in an average of **898 548 kg**. This week's increase means the industry remains significantly up versus last year (↑15% versus August 2023) and still slightly down on pre-pandemic levels (↓8% versus August 2019).

Figure 10 – International cargo from OR Tambo – volumes per month (kg millions)



Courtesy of ACOC. Updated: 14/08/2024.

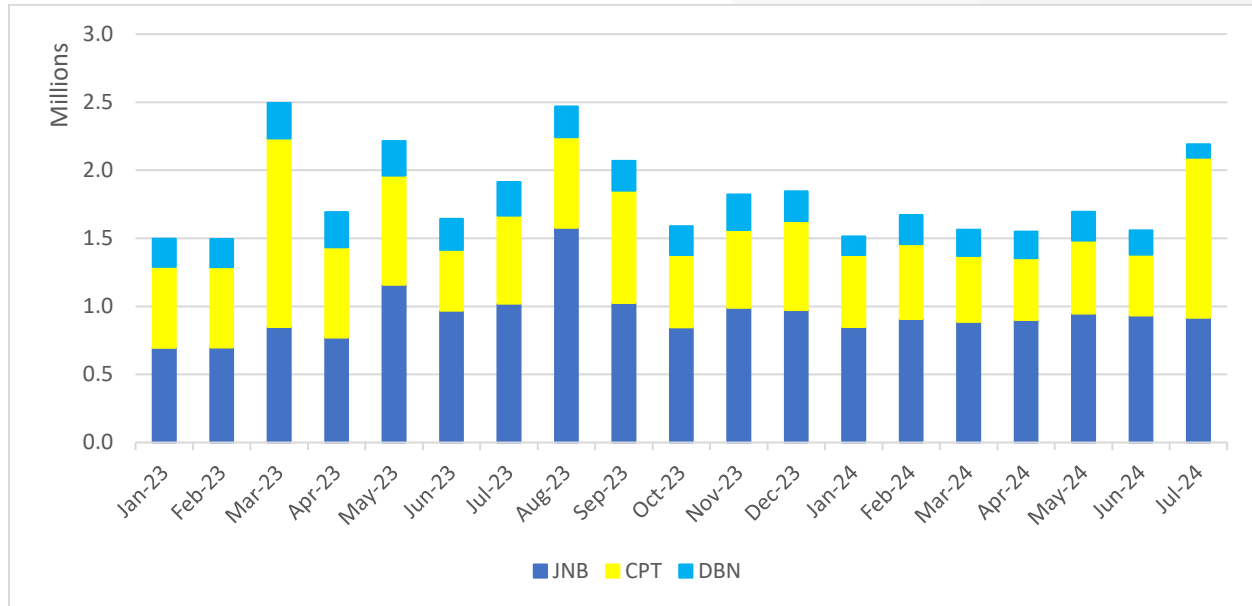
In air cargo news, Minister of Transport Barbara Creecy held an urgent meeting with key aviation entities to address ongoing flight disruptions caused by delays in auditing instrument flight procedures by Air Traffic Navigation Services (ATNS).¹² Creecy stressed the importance of safety and instructed ATNS to develop a detailed and costed plan with realistic timeframes to resolve the issue, to be submitted within two weeks. ATNS acknowledged the inconvenience caused and committed to prioritising the matter without compromising safety standards.

¹² FTW. 29/08/2024. [DoT – urgent action needed on aviation disruption](#),

b. Domestic air cargo

The following figure shows the movement since 2023:

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 30/08/2024.

3. Road and Regional Update

a. Cross-border and road freight delays

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

- The median border crossing times at South African borders increased significantly by around **four and a half hours** (mainly because of slow movement through Groblersbrug), averaging **15,8 hrs** (↑40%, w/w) for the week.
- In contrast, the greater SADC region (excluding South African controlled) increased by slightly less than **an hour** and averaged **~5,7 hrs** (↑19%, w/w).
- **DRC Border Operating Times:**
 - Changes to operating hours at DRC borders were announced in August, indicating that, as of May this year, borders would not operate at full capacity on Saturdays.
 - Despite this announcement, there has been no observable change in the situation at Kasumbalesa.
- **Violence at Luilu, near Kolwezi, DRC:**
 - On Monday, artisanal miners and diggers at Luilu near Kolwezi were forcibly removed, leading to violence that halted operations.
 - Military personnel were deployed to manage the situation – consequently, transporters are advised to avoid this area.

- **Queueing at Skilpadshek and Groblersbrug:**
 - Northbound traffic at Skilpadshek and Groblersbrug has experienced daily queues exceeding four kilometres due to the implementation of Mpox screening at various entry points.¹³
- Transporters, traders, and cargo owners are encouraged to use the non-tariff barrier (NTB) [online tool](#) UNCTAD and the AfCFTA Secretariat developed. However, given that platform's questionable effectiveness, transporters are encouraged to contact FESARTA and join their TRANSIST Bureau, arguably providing better and more reliable information.

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

Table 5 – Delays¹⁴ summary – South African borders (both directions)

Border Post	Direction	HGV ¹⁵ 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	448	4,6	6,3	39,0	13 440	3 136
Beitbridge	Zimbabwe-SA	400	3,3	2,2	11,5	12 000	2 800
Groblersbrug	SA-Botswana	249	0,5	1,4	30,0	7 470	1 743
Martins Drift	Botswana-SA	206	1,1	0,3	2,2	6 180	1 442
Kopfontein	SA-Botswana	246	0,6	1,5	11,1	7 380	1 722
Tlokweng	Botswana-SA	29	0,4	0,2	0,4	870	203
Violsdrift	SA-Namibia	30	0,1	1,2	3,4	900	210
Noordoewer	Namibia-SA	20	0,2	0,3	2,1	600	140
Nakop	SA-Namibia	30	0,3	1,0	3,1	900	210
Ariamsvlei	Namibia-SA	20	0,2	0,3	1,1	600	140
Skilpadshek	SA-Botswana	264	0,5	3,5	16,1	7 920	1 848
Pioneer Gate	Botswana-SA	61	2,3	1,0	1,5	1 830	427
Lebombo	SA-Mozambique	1 446	0,1	1,3	8,2	43 380	10 122
Ressano Garcia	Mozambique-SA	125	2,5	0,3	1,6	3 750	875
Sum/Average		3 574	1,2	1,5	9,4	107 220	25 018

Source: TLC, FESARTA, & Crickmay, week ending 25/08/2024.

Table 6 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Best Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	0,5	2,8	18,8	9 600	2 240
Central Corridor	798	0,0	0,6	3,7	23 940	5 586
Dar Es Salaam Corridor	1 819	43,9	1,6	13,5	54 570	12 733
Maputo Corridor	1 571	1,3	0,8	4,9	47 130	10 997
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 650	15,2	1,4	12,2	109 500	25 550
Northern Corridor	2 817	0,0	0,1	1,3	92 520	21 588

¹³ FTW. 20/08/2024. [Botswana announces screening for Mpox at main trade crossings.](#)

¹⁴ It should be noted that the root cause of the reported delays is uncertain and variable at this point. Moreover, the delays may be multiple and widely distributed. Therefore, they cannot be exclusively attributed to a specific common cross-border problem since we do not have a transparent view of the entire border process in granular detail. The causes of these bottlenecks typically include poor infrastructure, road congestion, and a lack of coordination between neighbouring countries and Customs (or OGA) stops, among other trade obstacles—data provided by the LMS (Logistics Monitoring System), which Crickmay produces in collaboration with SAAFF.

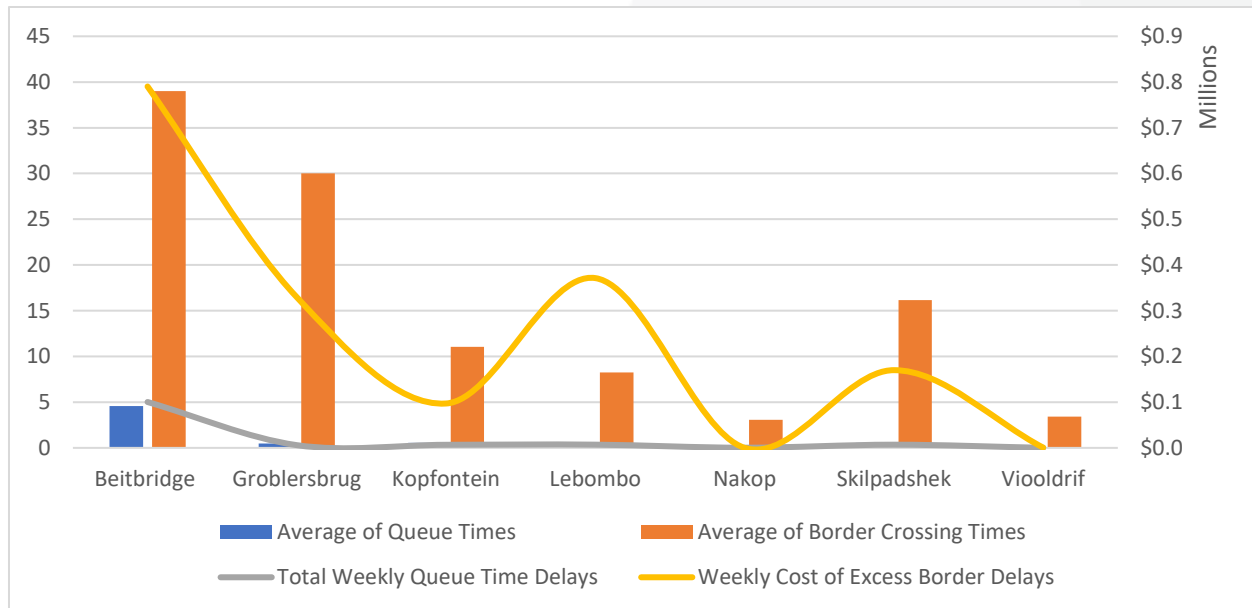
¹⁵ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Trans Caprivi Corridor	116	1,2	0,7	11,0	3 480	812
Trans Cunene Corridor	100	2,2	0,0	0,0	3 000	700
Trans Kalahari Corridor	355	1,3	1,3	5,6	10 650	2 485
Trans Oranje Corridor	100	0,2	0,7	2,4	3 000	700
Sum/Average	11 773	8,1	0,9	6,7	361 200	84 280

Source: TLC, FESARTA, & Crickmay, week ending 25/08/2024.

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

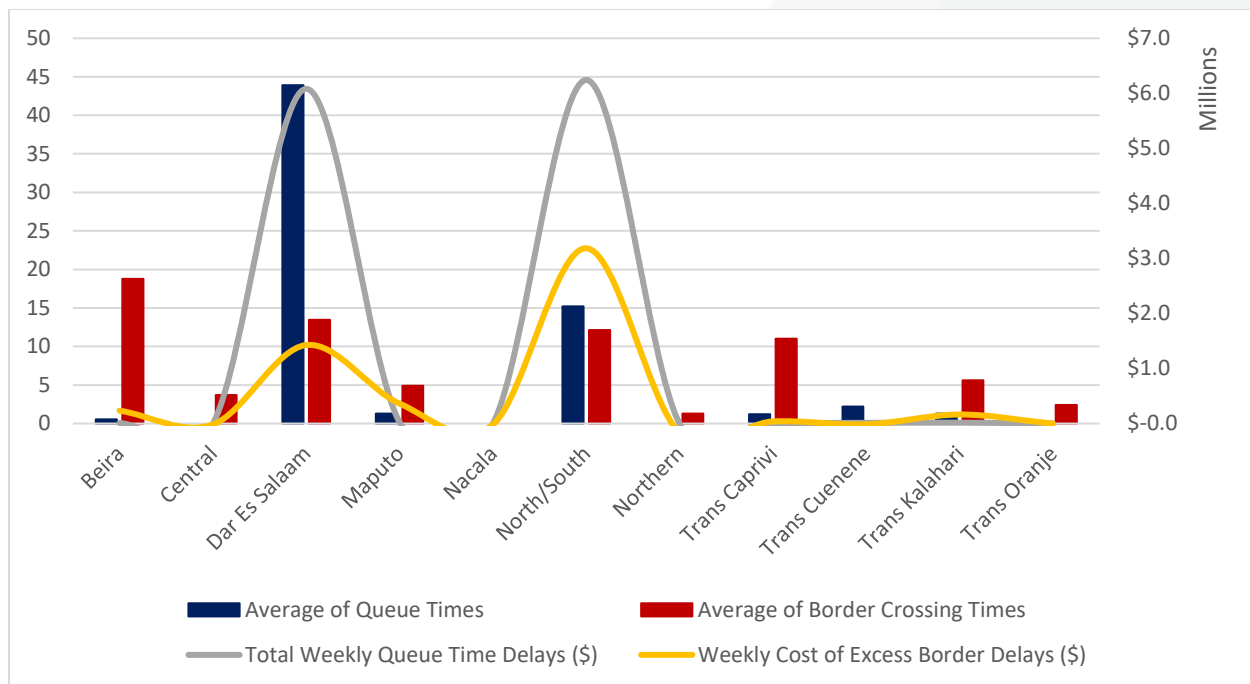
Figure 12 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 25/08/2024.

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

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



Source: TLC, FESARTA, & Crickmay, week ending 25/08/2024.

In summary, cross-border queue time averaged **~8,1 hours (essentially unchanged)** from the previous week's **~8,1 hours**, indirectly costing the transport industry an estimated **\$12,4 million (R218 million)**. Furthermore, the week's average cross-border transit times hovered around **~6,7 hours** (up by **~1,2 hours** from the **~5,5 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$5,2 million (R91 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$17,6 million (R310 million)**, up by **~R32 million** or **↑11%** from **~R288 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.

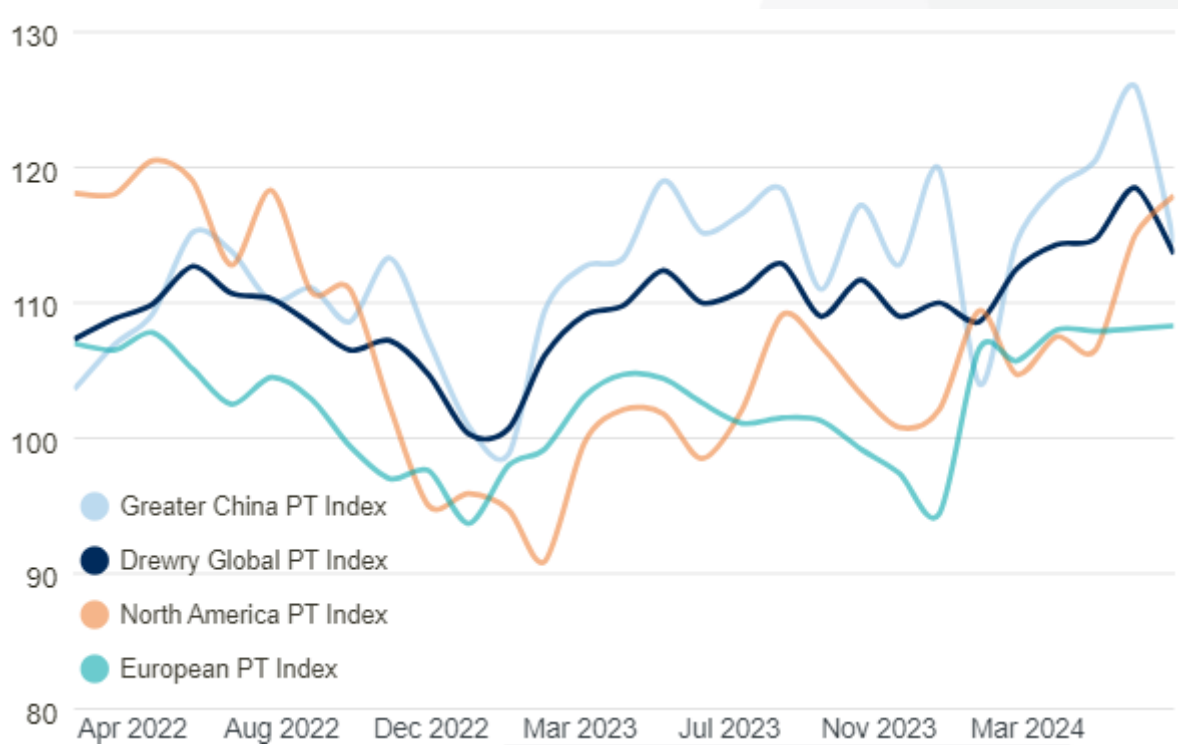
a. Global shipping industry

i. Port Throughput Indices

Drewry confirmed several previous figures and indices of increased demand and throughput in the global container industry this week. In June 2024, the *“Global Container Port Throughput Index”* increased by **↑3,3% (m/m)** to **118,5 points**, marking a **↑5,5%** year-on-year growth. The rolling 12-month average growth rate also climbed to **↑4,4%**. However, Drewry’s Nowcast model predicts a **↓4,1% (m/m)** decline for July, bringing the index down to **113,7 points**. Therefore, with the summer holidays in the northern hemisphere taking their toll on throughput¹⁶, the sustained increase is not yet inevitable, as evidenced by the following figure:

¹⁶ Alphaliner. 23/08/2024. [The Container charter market remained subdued.](#)

Figure 14 – Drewry Global Container Port Throughput Index (Jan 2019 = 100, calendar adjusted)



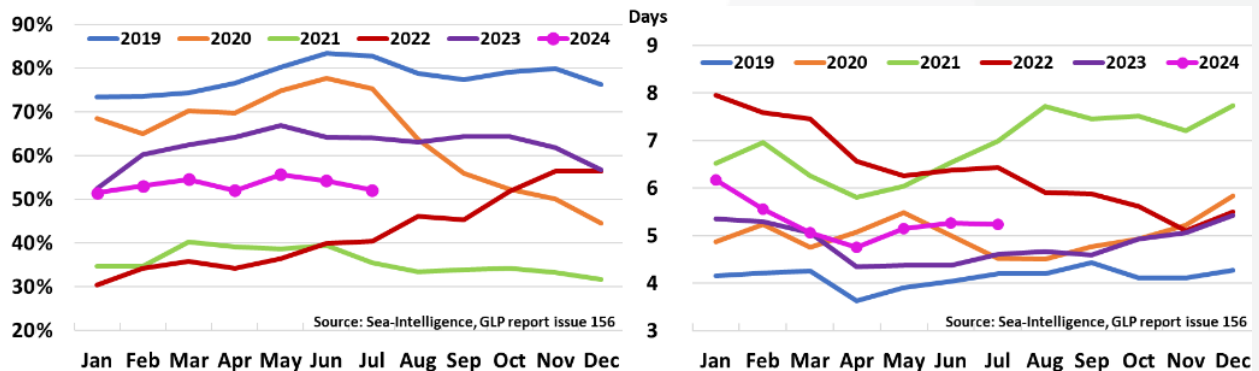
Source: [Drewry](https://www.drewry.com)

Regionally, the Greater China index rose by **↑4,6%** in June to **126,0 points**, representing a **↑6,0%** (y/y) increase. Moreover, the 12-month average growth rate in this region reached **↑5,8%**. Despite a general slowdown in volume growth at most major ports, Shenzhen saw a significant **↑14,0%** (y/y) rise in throughput for Q2 2024. In North America, the index surged **↑7,9%** in June to **115,0 points**, a **↑12,9%** (y/y) increase. The rolling 12-month average growth rate turned positive for the first time since 2022, reaching **↑2,5%**. Most major regional ports recorded double-digit annual growth in Q2 2024, except Los Angeles, Manzanillo, and Vancouver. The Middle East and South Asia Container Port Throughput Index saw a modest **↑2,0%** increase in June, with only a **↑0,2%** (y/y) rise. The region’s 12-month average growth rate improved to **↑1,1%**, primarily driven by solid performance at Indian ports, where volumes in Q2 2024 rose by **↑10%** (y/y) at Jawaharlal Nehru and Chennai and by **↑22%** at Kattupalli and Cochin. Lastly, the African index rose by **↑3,9%** in June to **122,2 points**, representing a significant **↑10,0%** (y/y) increase; however, the index is based on a small sample.

ii. Schedule reliability

According to *Sea Intelligence*, global schedule reliability dropped by $\downarrow 2,1\%$ (m/m) to **52,1%** in July 2024.¹⁷

Figure 15 – Global Schedule Reliability (%) and Global Average Delays for Late Vessel Arrivals (days)



Source: [Sea Intelligence](https://www.seaintelligence.com)

Consequently, schedule reliability remained consistent with the trends of the year, ranging between **50%-55%** and $\downarrow 12\%$ lower year-on-year. The average delay for late vessel arrivals slightly improved (by **0,02 days**, m/m) to **5,24 days**, still higher than pre-pandemic levels. Maersk was the most reliable carrier at **54,6%**, while Wan Hai was the least reliable at **41,3%**. Only ZIM and MSC showed month-on-month improvements. Year-on-year, all carriers experienced declines in reliability, with Wan Hai facing the steepest drop of $\downarrow 27,4\%$.

iii. Container market summary

There has been no material increase in port congestion at North American West Coast ports over the past week despite the labour stoppage by Canadian rail workers following the lockout of over **9 000 workers** on 22 August before the government called for binding arbitration with no further labour stoppages during the arbitration process paving the way for railway operations to resume on 26 August.¹⁸ Attention has shifted to Germany, as the German trade union ver.di has rejected the Central Association of German Seaport Operators' (ZDS) collective agreement offer.¹⁹ Nevertheless, the global port congestion indicator remains high and is hovering above the **2,31 million TEU mark**, accounting for **7,6% of the global fleet** (the highest level this year). In South Africa, port congestion at the Port of Durban has again deteriorated this week, as significant capacity waiting to be off-loaded is currently outside at anchorage (some **36 000 TEU**) and not outside at anchorage. As such, the queue-to-berth ratio at Durban was **0,90**²⁰ – another deterioration occurred last week, which was the year's best reading. Lastly, almost no capacity is sitting idle (only **~0,3%** of the total fleet), as the "*Cancelled Sailings Tracker*" increased this week with several trades being blanked²¹ and is standing at **10%**.²²

iv. Global container freight – yearly outlook:

Container freight rates are poised to fall by over $\downarrow 70\%$ by June next year (which would put them around **\$1 600** per 40-ft container), based on the latest competition on container freight index futures (CoFIF) EC contracts traded on the Shanghai International Energy Exchange (INE).²³ Although the drop is not as severe

¹⁷ Murphy, A. 29/08/2024. [Global schedule reliability drops by -2.1 percentage points in July](https://www.seaintelligence.com).

¹⁸ Linerlytica. 27/08/2024. [Global Port Congestion Stay High Last Week](https://www.linerlytica.com).

¹⁹ Goldstone, C. 27/08/2024. [Threat of more strikes at German ports as workers reject 'inadequate' offer](https://www.seaintelligence.com).

²⁰ Linerlytica. 28/08/2024. [Port Congestion Watch](https://www.linerlytica.com).

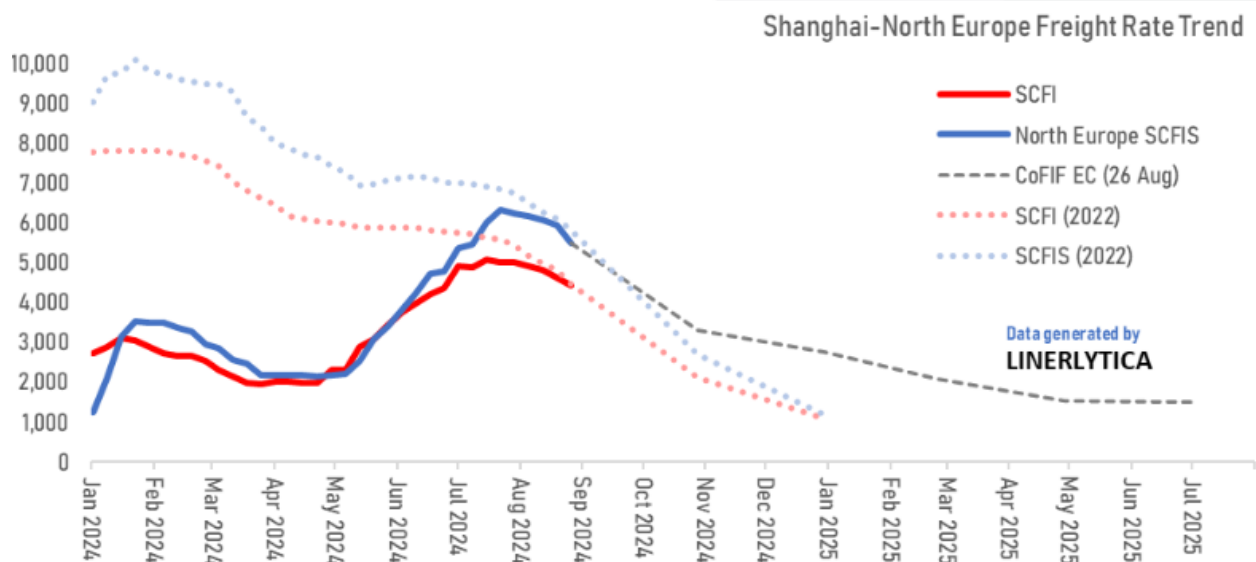
²¹ Wackett, M. 30/08/2024. [Ocean carriers 'fire blanks' ahead of China's Golden Week holiday](https://www.seaintelligence.com).

²² Drewry. 30/08/2024. [Cancelled Sailings Tracker](https://www.drewry.com).

²³ Linerlytica. 26/08/2024. [Market Pulse – Week 35](https://www.linerlytica.com).

as the freight rate collapse seen at the end of 2022, current freight futures prices anticipate continuous declines over the coming 12 months, with no rebound expected at the end of this year and no repeat of this year's post-Chinese New Year rate rally in 2025. The following graph from *Linerlytica* illustrates the outlook on the Shanghai-North Europe trade lane:

Figure 16 – SCFIS Index (May 2020 = 1 000)



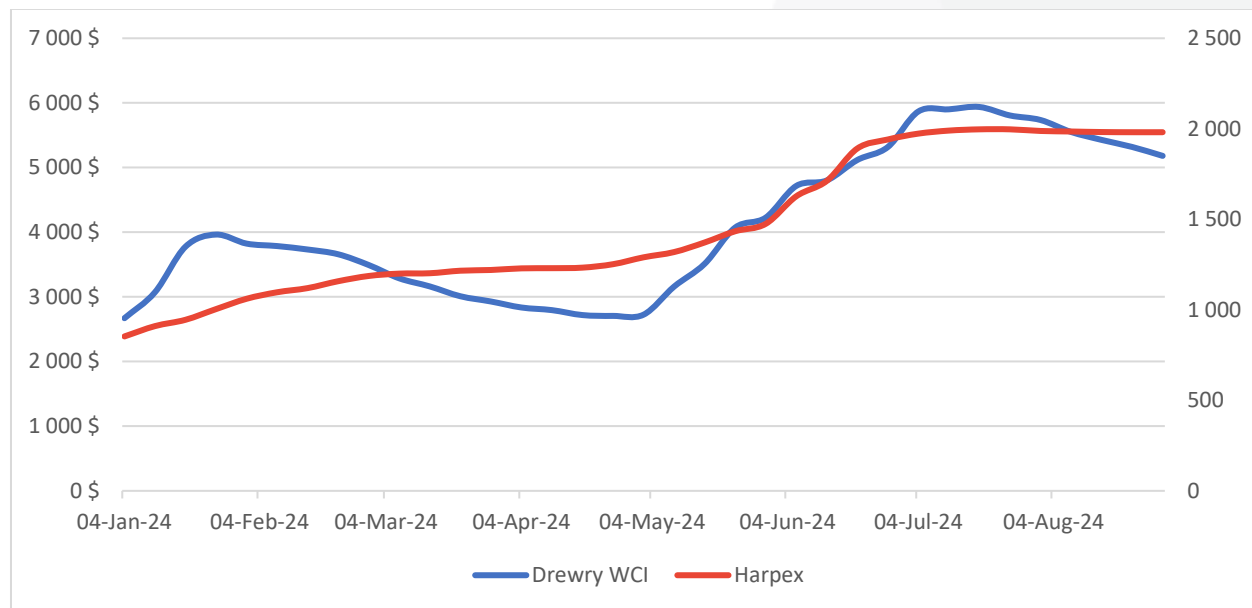
Source: Linerlytica

This week, carriers have failed to check the rate decline so far, with the SCFIS dropping by **↓12%** to North Europe from its peak in July with last week's **↓7,3%** decline overshadowed the relatively mild **↓1%** to **↓3%** week over week declines seen over the previous four weeks. According to Drewry's "World Container Index", the composite index is down (by **↓2,6%** or **\$138**) for a sixth consecutive week and trading at **\$5 181** per 40-ft container.²⁴ Charter rates were unchanged this week, as the *Harper Petersen Index* (Harpex) traded around **1 981 points** on Friday, but still up by **↑85%** compared to this time last year.²⁵ The following figure shows the movement of these two indices since the start of the year:

²⁴ Drewry. 29/08/2024. World Container Index.

²⁵ Harper Petersen Index. 30/08/2024. HARPER PETERSEN Charter Rates Index.

Figure 17 – World Container Index & Harpex (YTD)



Source: Calculated from [Drewry](#)

As illustrated, charter rates continue to stand slightly firmer compared to spot rates; however, these are expected to follow the path of spot rates. The latest spot-rate composite index is now **↓50% below** the pandemic peak (**\$10 377**) but **↑265%** more than the 2019 average (**\$1 420**). All eight major routes decline in the last week, and are expected to do so in the coming weeks – and indeed year, as predicted in the analysis above.

v. Further developments of note

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

1. Panama Canal Authority gives all clear:

- a. The Panama Canal is lifting restrictions that caused a global shipping bottleneck as water levels normalise after a severe drought.²⁶
- b. Canal administrator Ricaurte Vasquez said 36 vessels a day would be able to transit — up from as few as 24 — after recent rains lifted water levels at an artificial lake that forms part of the canal system. About 30 to 32 vessels are transiting the waterway, below pre-drought capacity, he said, adding it'll take several months for shippers to return in full.

2. Average container ship sizes continue to increase:

- a. The average size of container ships has increased by **↑3,5%** (y/y), reaching **4 809 TEU** as of August 2023. Liner operators, such as ZIM, which saw a **↑30,8%** increase in average vessel size, are leveraging economies of scale by deploying larger ships, particularly in Latin America-related trades where vessel capacity has notably grown. ZIM, MSC, and CMA CGM outpaced the market in average vessel size growth, further closing the gap among the top 10 carriers.

²⁶ McDonald, M. 27/08/2024. [Panama Canal Eases Limits That Caused Global Shipping Bottleneck.](#)

3. Inconsistencies and limitations of ocean carrier's carbon emissions calculators:

- a. *Sea Intelligence* this week effectively highlights the inconsistencies and limitations of carbon emissions calculators provided by ocean carriers, pointing out that methodological differences render them unreliable for comparative analysis.²⁷
- b. The significant discrepancies between the calculators, despite the same underlying vessels, underscore the challenge of obtaining accurate and meaningful carbon data.
- c. The conclusion—that these tools have become less informative over time—raises critical concerns about the transparency and utility of such calculators for shippers seeking to make environmentally conscious decisions.
- d. Elsewhere this week, reports of decarbonisation have been made as LNG continues to drive global shipping. Furthermore, shipping decarbonisation efforts are set to double freight costs, with various scenarios projecting a **↑91%** and **↑112%** bump to freight rates permanently.²⁸

4. Port of Beira hits record cargo volumes:

- a. The Port of Beira in Mozambique experienced a remarkable **↑122%** growth in cargo volumes, reaching **442 000 tonnes** in July 2024 compared to 199 000 tonnes in July 2023.²⁹
- b. The port's general cargo terminal saw a **↑24%** increase in volumes for the first seven months of 2024, while the container terminal grew by **↑40%**, handling **226 000 containers**.
- c. The growth was driven by increased imports of clinker, corn, wheat, equipment, and sulphur, with significant contributions from domestic and regional markets, including new trade partnerships with Zambia.
- d. Beira is not a full-fledged competitor to Durban, as Durban handled **1,7 million TEUs** YTD (nearly seven times as much) and **4 million tonnes** in July (nearly nine times as much); nevertheless, Beira is starting to pick up (and will continue to—given our constraints) cargoes previously handled by Durban.

b. Global air cargo industry

In July 2024, global air cargo demand saw robust growth, driven by strong performance from China, the Asia Pacific, and e-commerce – continuing the eighth consecutive month of double-digit demand growth.³⁰ World ACD reports double-digit year-on-year increases in tonnage from four of the six main regions, with Middle East and South Asia (MESA) and Asia Pacific leading at **↑21%** and **↑17%**, respectively. Overall, global tonnage increased by **↑13%** in July, consistent with a **↑12%** growth year-to-date (YTD). Capacity in the global air cargo market also rebounded, with a **↑9%** increase compared to July 2023 and a **↑7%** growth YTD. While most regions saw month-on-month tonnage increases, North America slightly declined by **↓1%**. Weekly figures show that in the last week of August 2024 (week 34), global air cargo tonnages rebounded by **↑5%**, primarily driven by an **↑11%** week-on-week increase from Asia Pacific, following a dip due to Typhoon Ampil in Japan. This recovery was notably strong in Japan (**↑91%**), South Korea (**↑16%**), mainland China (**↑7%**), and Hong Kong (**↑3%**). The following shows air cargo volume, capacity, and rates across the last five weeks in the major regions:


²⁷ Murphy, A. 27/08/2024. [Save 71% of CO2 emissions in Ocean Alliance?](#)

²⁸ Bartlett, C. 30/08/2024. [Methanol 'happy hour' over, and decarbonisation will double freight rates.](#)

²⁹ FTW. 29/08/2024. [Port of Beira hits record cargo volumes.](#)

³⁰ Goldstone, C. 28/08/2024. [Global airfreight market sees eighth month of double-digit demand growth.](#)

Figure 18 – Capacity, weight, and rates by region (last five weeks)

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		-2%	+1%		-1%	+4%		-1%	+1%
Asia Pacific		-2%	+7%		-4%	+11%		+2%	+22%
C. & S. America		-1%	+19%		+3%	+8%		+1%	-5%
Europe		+0%	+3%		-10%	+8%		+1%	-10%
M. East & S. Asia		+1%	+2%		-4%	+10%		+2%	+59%
North America		-0%	+5%		-1%	+6%		+1%	-9%
Worldwide		-1%	+5%		-5%	+9%		+1%	+12%

Source: [World ACD](#)

Worldwide air cargo rates remained stable at **\$2,51 per kilogram**, up **↑12%** (y/y). However, spot rates from specific regions saw significant increases, such as a **↑161%** (y/y) rise in rates from Bangladesh to Europe, reaching over **\$5 per kilogram**. Rates from India and Sri Lanka to Europe also remained elevated, with annual increases of **↑145%** and **↑106%**, respectively, despite some stabilisation in recent weeks. Capacity increases on key routes have driven price reductions on back-haul lanes from Europe and North America.

In other air cargo news, foreign airlines have reacted strongly to an emergency security change by the US Transportation Security Administration (TSA) requiring additional details of shippers and consignees for airfreight, effective from 21 August 2024. Korean Air Lines temporarily halted cargo sales from certain regions to the US in response to the new regulations, seeking clarity on the requirements. The changes, likely linked to the US Air Cargo Advanced Screening System (ACAS), have raised concerns in the industry due to the sudden and unclear implementation.³¹

ENDS³²

³¹ Whiteman, A. 28/08/2024. [Foreign airlines react to sudden new US rule tightening air cargo security](#).

³² **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. This edition is proudly sponsored by [Turners Shipping](#).*



FERI CERTIFICATES FOR IMPORTED AND TRANSITED GOODS TO OR THROUGH THE DRC



Procedure

Turners Shipping has been designated as an official Freight Certification sub-Agent for the Democratic Republic of Congo (DRC), mandated to issue the FERI (Fiche Electronique de Renseignement à l'Importation) Certificates.

1

Submit the required documents by email or online.

2

Complete the application form and provide supporting documentation.

3

You will receive an invoice with attached draft, typically within 24 hours of all documents/information received.

4

When payment reflects, the draft approved and a copy of the final bill of lading received; the validation will be requested.

5

To avoid fines, the FERI must be validated before the vessel arrives at the destination.

Introduction

The FERI Certificate is an essential requirement for all cargo entering the Democratic Republic of Congo (DRC). It is designed to streamline customs processes and ensure compliance with the DRC's import regulations.

Turners Shipping plays a pivotal role in facilitating smoother trade flows and enhancing the efficiency of cargo movement into one of Africa's most significant economies.

The FERI Certificate is an electronic document required to clear imported and transited goods to or through the DRC.

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- We **reduce your administrative burden** by completing the application on your behalf.
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