

Cargo Movement Update #202¹

Date: 6 September 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)	27 261	30 462	57 723	22 949	22 809	45 758	↑26%
Air Cargo (tons)	3 528	2 637	6 165	3 803	2 487	6 290	↓2%

Monthly Snapshot

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

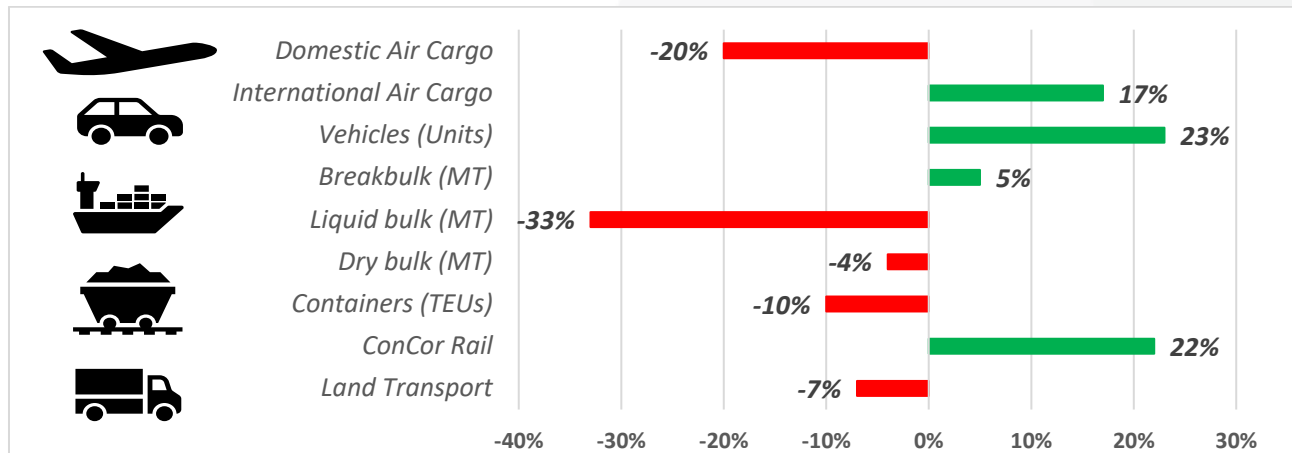
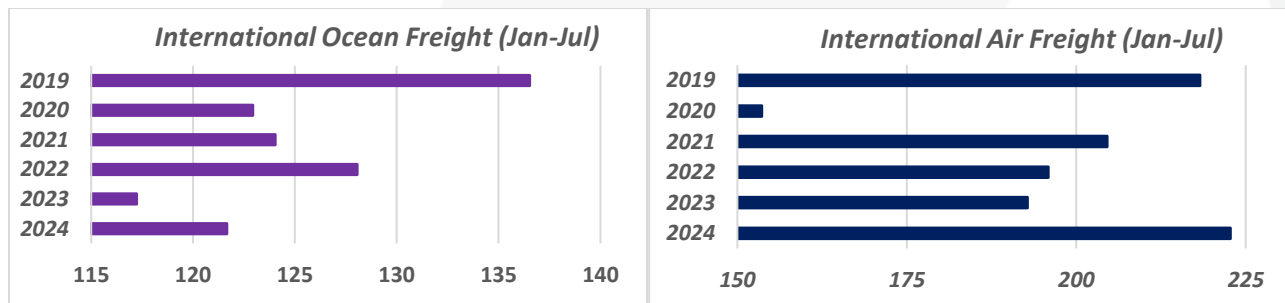


Figure 2 – Year-to-date flows 2019-2024⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~8 246 containers** was handled per day, with **~8 448 containers** projected for next week.
- Rail cargo handled out of Durban was reported at **2 093 containers**, down **↓30%** from last week.
- SARS July trade stats: exports are up by **↑1,8%** (m/m), imports **↑6,6%**, YTD trade surplus: **R85,3 billion**.
- Cross-border queue: **no change**; transit: **↑1,2 hrs**; SA borders: **13,5 hrs (↓15%)**; SADC: **7,3 hrs (↑28%)**.
- Global container volume (dry & reefer) is down by **↓0,2%** (m/m) and up by **↑5,6%** (y/y) in July.
- Container rates dropped by **↓7,8%** (or **\$406**), trading at **\$4 775/40ft**. Dry & reefer price: **↑57,3%** (y/y).
- IATA reports that air cargo demand grew by **↑13,6%** (y/y) in July, as global capacity grew by **↑8,3%**.

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 202nd 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, an average of **8 246 containers** was handled per day, down from **6 537 containers** last week. Adverse weather, high swells, and equipment breakdowns primarily constrained port operations. Network issues and a distress vessel at Berth 601 at the Port of Cape Town represented the primary operational constraints. At the same time, high swells delayed a vessel in Durban for around 31 hours this week. More than 30 operational hours were lost at our Eastern Cape Ports due to strong winds, as minimal delays were reported at the Port of Richards Bay this week. Additionally, minimal rail operations took place on the ConCor this week due to the national shutdown; however, the latest reports received on Thursday morning suggested that everything was on track for operations to resume at 18:00 on Thursday evening. Furthermore, British LPG value chain company Petredec and TFR announced a groundbreaking rail freight solution to transform gas distribution in South Africa this week.

Globally, this week's key developments concern container throughput and rate reductions. In July, global container throughput saw a slight decline of **↓0,2%** (m/m), improving from a **↓1,9%** drop in June and performing better than Drewry's forecast of a **↓4,1%** decline. However, annual throughput is up **↑5,6%**, reflecting a more robust global demand for complex goods. While most trade lanes remained stable, Australasia and Oceania experienced a **↓5,2%** decrease (m/m). Sub-Saharan Africa container trade was subdued, as throughput dropped by **↓1,1%** drop in exports, and the region saw a **↓0,8%** decrease in imports in July, though yearly exports increased by **↑2,1%**, while imports fell **↓8,8%**. South Africa contributed **27%** of SSA imports and **45%** of exports in July, down from previous highs. Asia-Europe container spot freight rates dropped, with a **↓14%** fall on the Shanghai-Rotterdam route. The composite index is now down **↓54%** from the pandemic peak, with further rate declines expected. These sentiments are echoed by consolidated numbers from CTS. The global price index rose sharply in July (by **↑16,8%** monthly and **↑57,3%** yearly); however, these trends are expected to reverse as the year unfolds. Despite weakening demand, container shipping profits surged in the second quarter, exceeding **\$10 billion** due to record volumes and rising rates, with major carriers like Maersk and Cosco seeing substantial gains. Other developments included **(1)** services set to shut down as 'super typhoon' heads for South China and **(2)** Hamburg's city parliament approving MSC's purchase of a stake in HHLA.

The daily average of air cargo handled at ORTIA in the previous week amounted to **504 063 kg** inbound (**↓7%**, w/w) and **376 713 kg** outbound (**↑6%**), resulting in an average of **880 775 kg**. Despite this week's decrease, the industry remains significantly up versus last year (**↑13%** versus August 2023) and still down on pre-pandemic levels (**↓10%** versus August 2019). Internationally, air cargo demand grew by **↑13,6%** year-on-year, with international operations rising by **↑14,3%**. Capacity increased by **↑8,3%**, driven by a **↑12,8%** growth in international belly capacity and a **↑6,9%** increase in freighter capacity. The air cargo sector benefits from global trade, e-commerce, and maritime shipping constraints, positioning it for a strong year. In July, global manufacturing showed slight expansion, while export orders contracted. Inflation remained stable across major economies, except for a slight rise in China. In other air cargo news, Alibaba's Cainiao has launched twice-weekly flights from Xi'an to Liege for faster cross-border parcel deliveries across Europe. At the same time, Lufthansa Cargo plans to modernise its Frankfurt hub by **€600 million** to enhance its logistics capabilities.

In the regional cross-border road freight trade, the average queue times were **essentially unchanged** from last week, as the transit times increased by more than **an hour** from last week. The median border crossing times at South African borders decreased by around **two and a half hours**, averaging **13,5 hrs** (**↓15%**, w/w) for the week. In contrast, the greater SADC region (excluding South African controlled) increased slightly –

by around **an hour and a half** and averaged **~7,3 hrs (↑28%, w/w)**. On average, four SADC border posts last week took around a day to cross – Beitbridge, Groblersbrug, Kasumbalesa, and Katima/Mulilo (the worst affected, taking **nearly four days** to cross). Other developments included **(1)** traffic congestion and protest action on major South African roads, **(2)** Beitbridge security incidents, and **(3)** Mamuno OSBP completion and trial run.

The major development of this week was the release of Transnet's financial results for the year ending 31 March 2024.⁶ Transnet's financial results for the year reflect a mix of significant achievements and substantial challenges. Revenue increased by **↑11,6%** to **R76,7 billion**, alongside a notable **↑13,6%** rise in cash generated from operations. Capital investment surged by **↑20,1%**, indicating robust infrastructure spending. However, EBITDA declined by **↓3,6%**, reflecting the operational inefficiencies that have been well-established. The alarming matter remains the fact that Transnet reported a **R7,3 billion loss**, mainly due to a **R4,8 billion** provision for the Natref litigation; however, perhaps more serious has been the fact that the net finance costs rose by **↑14,8%** to **R13,8 billion**. Gearing stands at **46,2%**, within covenant limits, but highlights Transnet's high debt levels and emphasises the absolute need to generate revenue from increased operations in the future. Incidentally, actual versus budgeted throughput in all sub-sectors was down (rail at **↓1,7%**, containers at **↓1,8%**, petroleum at **↓3,7%**, and vehicles at **↓5,1%**). Lastly, the restatements of prior financials indicate historical errors, and auditors have expressed concerns about Transnet's ability to continue as a going concern.

Despite these difficulties, collaboration between business, industry, and Transnet remains crucial for ensuring its recovery—especially given the weakly positive growth figures posted this week.⁷ Together, we can address these challenges and leverage growth opportunities. Transnet's strategic investments and recovery plan show that there is still potential for a turnaround. Now more than ever, perseverance and collective action are essential to rebuilding and strengthening South Africa's logistics infrastructure for the future.

⁶ Transnet. 02/09/2024. [Integrated Report – 2024](#).

⁷ Stats SA. 03/09/2024. [Gross domestic product Second quarter 2024](#).

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	11
vii. Transnet Freight Rail (TFR).....	11
2. Air Update	12
a. International air cargo	12
b. Domestic air cargo	12
3. SARS Merchandise Trade Statistics: July	13
4. Road and Regional Update	13
a. Cross-border and road freight delays	13
5. International Update	16
a. Global shipping industry	16
i. Global container trade statistics - July.....	16
ii. Global container freight rates.....	18
iii. Further developments of note.....	19
b. Global air cargo industry.....	20

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 31 August to 6 September⁸

7-day flow reported (31/08/2024 – 06/09/2024)			
TERMINAL	NO. OF CONTAINERS ⁹ TO DISCHARGE (IMPORT)	NO. OF CONTAINERS TO LOAD (EXPORT)	CHANGE (w/w %)
DURBAN CONTAINER TERMINAL PIER 1:	5 422	4 889	↑16%
DURBAN CONTAINER TERMINAL PIER 2:	9 544	12 721	↑9%
CAPE TOWN CONTAINER TERMINAL:	5 162	5 824	↑72%
NGQURA CONTAINER TERMINAL:	5 318	5 422	↑33%
GQEBERHA CONTAINER TERMINAL:	1 815	1 606	↑78%
TOTAL:	27 261	30 462	↑26%

Source: Transnet, 2024. Updated 06/09/2024.

Table 3 – Container Ports – Weekly flow forecasted for 7 to 13 September

7-day flow forecast (07/08/2024 – 13/09/2024)			
TERMINAL	NO. OF CONTAINERS TO DISCHARGE (IMPORT)	NO. OF CONTAINERS TO LOAD (EXPORT)	FORECAST VS ACTUAL (w/w %)
DURBAN CONTAINER TERMINAL PIER 1:	3 680	6 196	↓4%
DURBAN CONTAINER TERMINAL PIER 2:	11 137	13 141	↑9%
CAPE TOWN CONTAINER TERMINAL:	2 895	4 938	↓29%
NGQURA CONTAINER TERMINAL:	6 061	7 278	↑24%
GQEBERHA CONTAINER TERMINAL:	659	3 153	↑11%
TOTAL:	24 432	34 706	↑2%

Source: Transnet, 2024. Updated 06/09/2024.

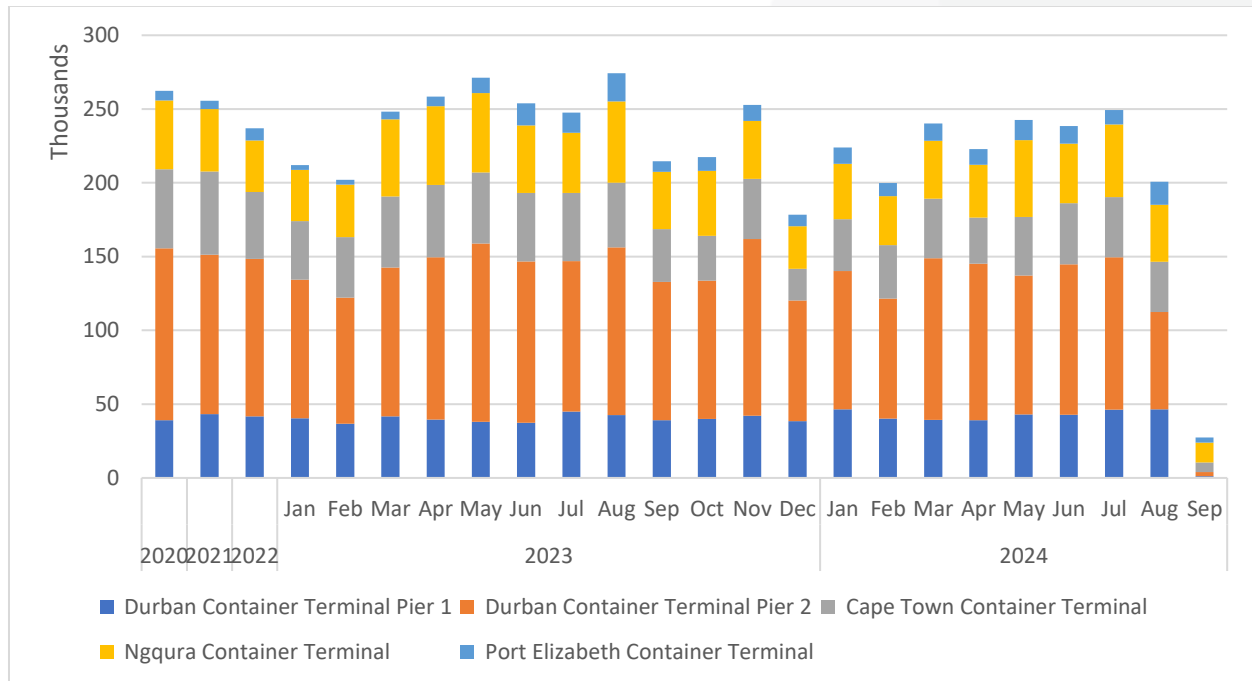
An increased average of **~8 246 containers (↑26%)** was handled per day for the last week (31 August to 6 September, Table 2), compared to the projected average of **~8 365 containers (↓1% actual versus projected)** noted in last week's report. For the coming week, an increased average of **~8 448 containers (↑3%)** is predicted to be handled (7 to 13 September, Table 3) in a best-case scenario. This week, port operations were subdued by adverse weather, high swells, and equipment breakdowns.

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.

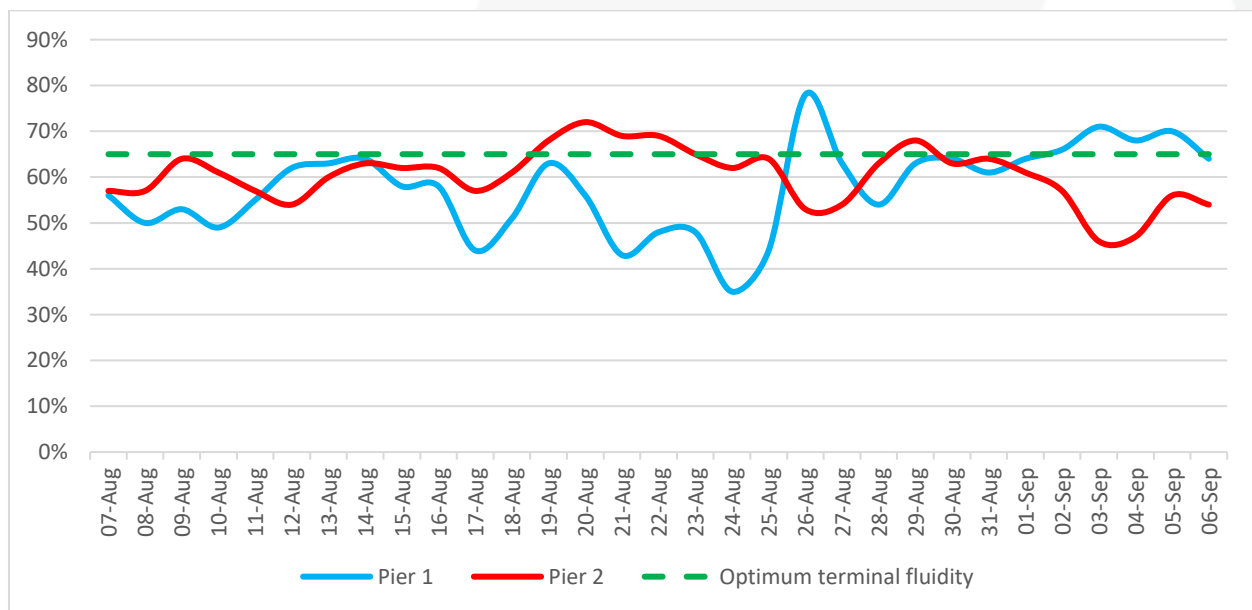
Figure 3 – Monthly flow reported for total container movement (containers April 2020 to present, m/m)



Source: Calculated using data from Transnet, 2024, and updated 06/09/2024.

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

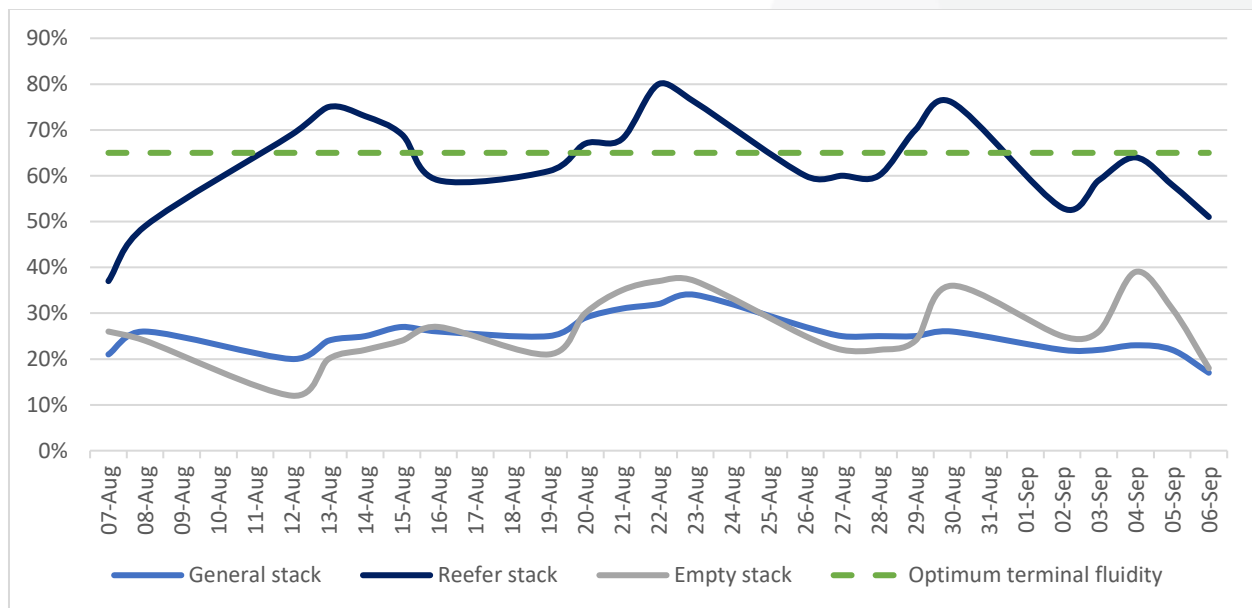
Figure 4 – Stack occupancy in DCT, general-purpose containers (7 August to present; a day on the day)



Source: Calculated using data from Transnet, 2024, and updated 06/09/2024.

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 (7 August to present, day on day)



Source: Calculated using data from Transnet, 2024, and updated 06/09/2024.

b. Summary of port operations

i. Weather and other delays

- Network issues and a distress vessel at Berth 601 at the Port of Cape Town represented the primary operational constraints.
- High swells delayed a vessel in Durban for around 31 hours this week.
- More than 30 operational hours were lost at our Eastern Cape Ports this week due to strong winds.
- Minimal delays were reported at the Port of Richards Bay this week.

ii. Cape Town

On Thursday, CTCT recorded three vessels at berth, of which one is a distressed vessel and two at anchor, as network challenges prevented optimal performance in the 24 hours before. Between Monday and Thursday, on the landside, the terminal managed to service 3 517 trucks while handling 305 rail units. On the waterside, the terminal executed approximately 5 190 container moves across the quay during the same period. Stack occupancy for GP containers was recorded at **22%**, reefers at **58%**, and empties at **31%**. Additionally, the terminal operated with **eight STS cranes**, **24 RTGs**, and **55 hauliers** towards the end of the week. Crane LC3 remains out of commission, and no ETR has been available.

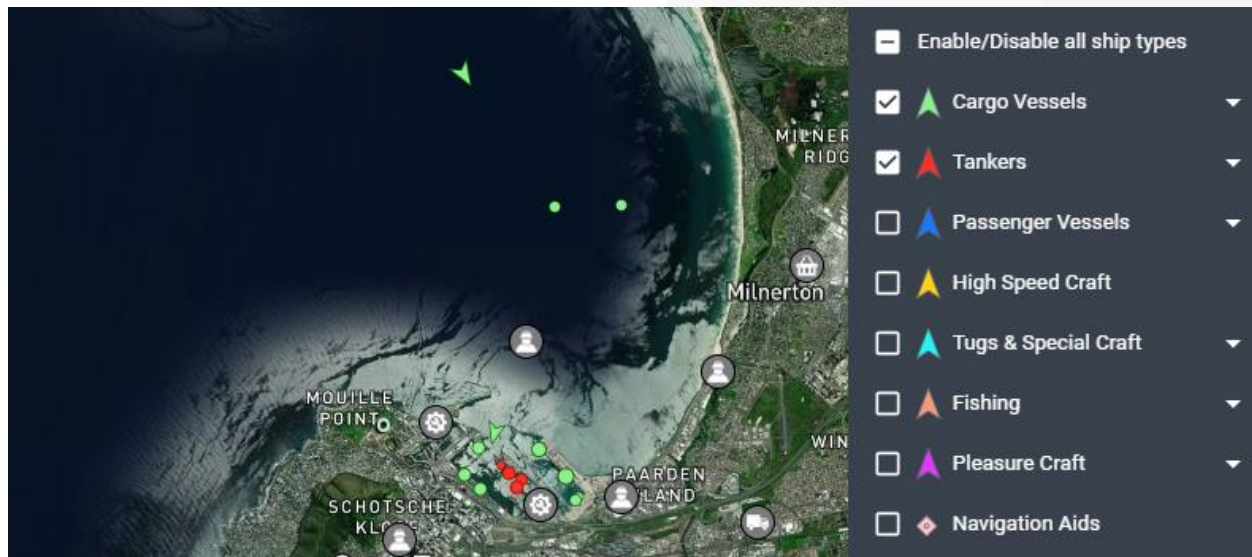
The distressed vessel berthed at berth 601 at CTCT on 2 September and will remain berthed until all required work on the vessel is completed. TPT could not yet indicate when the vessel might leave the terminal. The industry should take note of this, as the delays could be felt across the entire port system.

On Thursday, CTMPT recorded two berthed vessels and one at anchor. Between Monday and Thursday, the terminal managed to move 15 123 tons of bulk cargo and 610 TEUs across the quay. On the landside, 831 trucks were processed during the same period. Towards the end of the week, stack occupancy was recorded at **13%** for general cargo, **56%** for reefers, and **4%** for empties. The terminal had fluctuating crane availability throughout the week but ended with **two cranes** in service.

The FPT terminal serviced six vessels from 26 August to 1 September 2024: three multi-purpose, one container, one layby, and one dry bulk vessel. Berth occupancy during this period was recorded at 64%. FPT planned to handle seven vessels between 2 and 8 September, with another nine scheduled between 09 and 15 September. Adverse weather, accompanied by the late arrival of cargo, accounted for most delays at the terminal this week.

At midday on Friday, there were **two 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 06/09/2024 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, operated by four gangs, with another two at anchor. Stack occupancy was **70%** for GP containers and **54%** for reefers. Between Monday and Thursday, the terminal executed **4 423 gate moves** on the landside with an average staging time of **~76 minutes** throughout the week. Additionally, the terminal moved approximately **5 805 TEUs** across the quay on the waterside during the same period. The terminal had six STS cranes and 15 RTGs in service on Wednesday.

Pier 2 had four vessels on berth and four at anchorage on Thursday, as adverse weather and equipment breakdowns prohibited optimal operational performance this week. Stack occupancy was recorded at **56%** for GP containers and **37%** for reefers. The terminal operated with **11 gangs** and moved approximately **13 005 containers** across the quay between Monday and Thursday on the waterside. During the same period, there were approximately **7 513 gate moves** on the landside, with an average staging time of **~61 minutes** throughout the week. Additionally, approximately **440 units** were moved by rail during the same period despite the annual shutdown of the ConCor. The number of available straddle carriers fluctuated between **50** and **53** this week.

Durban's MPT terminal recorded three vessels at berth on Thursday and two at outer anchorage. Stack occupancy for containers was 94%, with the breakbulk stack at 70%. In the preceding 24 hours, the terminal managed to handle 388 containers and 4 348 tons of breakbulk on the waterside. On the landside, 427 container trucks and 220 breakbulk RMTs were serviced. Towards the end of the week, three cranes, 12

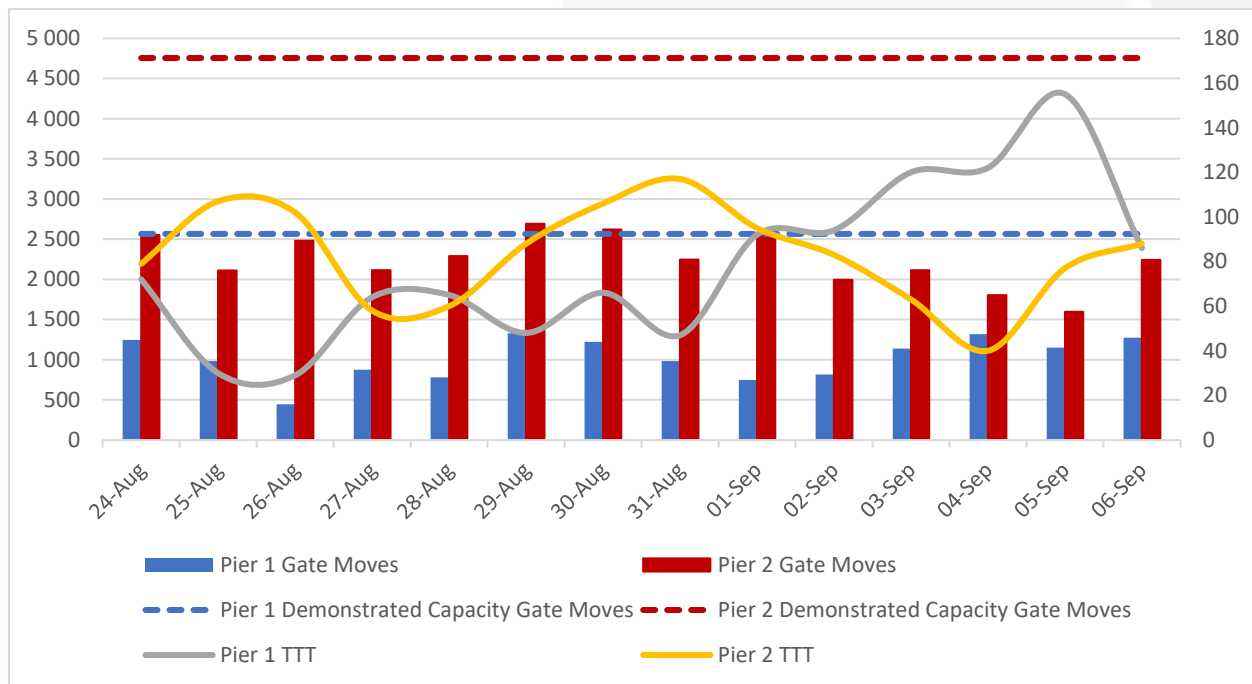
reach stackers, eight forklifts, and 18 ERFs were in operation. Crane 03 remains on an extended outage, with Liebherr confirming a structural failure on the boom. No ETR is available yet.

On Friday, Maydon Wharf MPT recorded two vessels at berth but zero at anchor. In the preceding 24 hours, the terminal managed to handle 2 342 tons of bulk and 153 containers on the waterside. On the landside, the terminal managed to service 28 RMTs, conveying approximately 965 tons and 157 container trucks. 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 one vessel on the berth, with none at anchorage. In the prior 24 hours, the terminal handled 439 road units on the landside while handling 1 533 units on the waterside. Overall stack occupancy was 42% (Exports: 73%, Imports: 24%, Transshipments: 3%), 5% at Q&R, and 60% at G-berth. During this period, the terminal had 176 high-and-heavy (abnormal loads) on hand and managed to handle 25.

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.

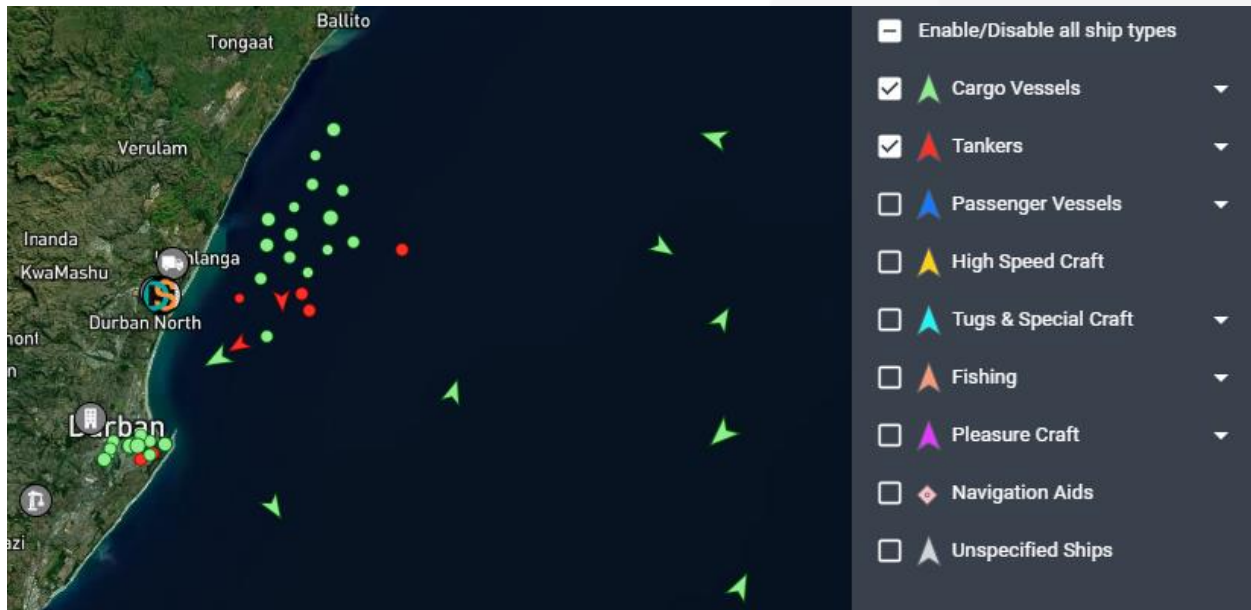
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 06/09/2024.

A queue of container vessels waiting outside Durban has built up and remains. At midday on Friday, four vessels were waiting for Pier 2, three for Pier 1, and two for Point terminal, with a current estimation of **at least ten 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 06/09/2024 at 14:00.

iv. Richards Bay

On Thursday, Richards Bay recorded eight vessels at anchor and 11 on the berth, translating to six vessels at DBT, four at MPT, one at RBCT, and none 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 one vessel at berth and zero at anchor while handling 141 386 tons on the waterside. On the landside, 25 trains were serviced, against the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded three vessels on berth and two at anchor, with three vessels drifting. 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 71% for reefers, 90% for reefer ground slots, and 47% for the general stack. Despite conceding over 30 operational hours to adverse weather this week, the terminal handled 7 041 TEUs on the waterside between Monday and Thursday. On the landside, 987 trucks were processed at an average truck turnaround time of ~30 minutes during the same period. Towards the end of the week, the terminal had six STS cranes and 24 RTGs in service.

The distressed vessel CMA/CGM Belem is currently anchored and awaiting an available berth at NCT. Exceptionally high volumes of export reefer containers require all available berths. Current expectations are that the vessel may berth on 13 September.

On Thursday, GCT recorded one vessel at berth and one at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the preceding 24 hours. On the waterside, 905 TEUs and 172 reefers were handled across the quay, while 401 trucks were processed at a truck turnaround time of ~27 minutes. Stack occupancy figures were recorded at 87% for reefers, 89% for reefer ground slots, and 54% for the general stack. Towards the end of the week, the terminal had one crane, one mobile harbour crane, and ten straddles in service.

Minimal operations took place at the Ro-Ro terminal this week as the next vessel is anticipated to arrive on Saturday. The latest stack occupancy figure reflected 41%.

Lastly, The Port of East London received two new high-tech tugboats, completing Transnet National Ports Authority’s **R1 billion Marine Fleet Renewal Programme** as part of Transnet’s broader Recovery Plan to enhance port efficiency and competitiveness. With upgraded capabilities, these tugboats (*Lentswe* and *Kganya*) will improve vessel navigation, pilotage, and pollution management.

vi. Saldanha Bay

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

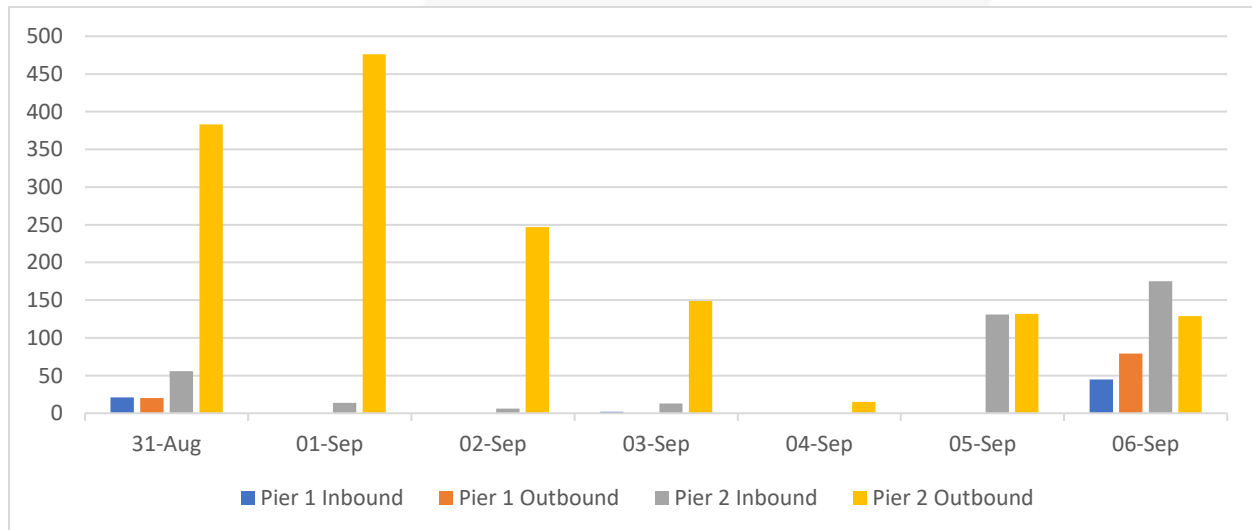
vii. Transnet Freight Rail (TFR)

Minimal rail operations took place on the ConCor this week due to the national shutdown. However, the latest reports on Thursday morning suggested that everything was on track for operations to resume at 18:00 on Thursday evening. Additionally, this week, British LPG value chain company Petredec and TFR announced a groundbreaking rail freight solution that aims to transform gas distribution in South Africa.¹⁰ This landmark project will feature a dedicated train system, modern LPG intermodal hub and storage facility at Sentrarand, Benoni, in Gauteng; the hub will receive bulk LPG via rail from the initial loading point at the Richards Bay LPG terminal in KwaZulu-Natal, with Petredec introducing the first scheduled LPG train system in the country. Each 75-wagon train set will have the capacity to transport more than 2 500 tons of LPG. Furthermore, towards the end of the week, DCT Pier 2 had 215 ConCor units on hand with a dwell time of five days and 71 over-border units on hand with a dwell time of 18 days.

TFR reported that the annual national shutdown was completed and lines opened; however, on the ConCor line, cable theft was experienced over the night of 6 of September, delaying operations for eight hours. A derailment occurred at Dassenhoek outside Durban which has effectively closed the route. A communication indicating estimated re-opening will be released on 9 of September.

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 06/09/2024.

¹⁰ Freight News – 05/09/2024 - [Transnet and Petredec sign up for historic LPG project](#)

In the last week (31 August to 6 September), rail cargo handled out of Durban was reported at **2 093** containers, down by **↓30%** from the previous week's **2 976** containers.

2. Air Update

a. International air cargo

The following table shows the inbound and outbound air cargo flows to and from ORTIA for the week beginning 26 August. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in August 2023 averaged **~780 820 kg** per day.

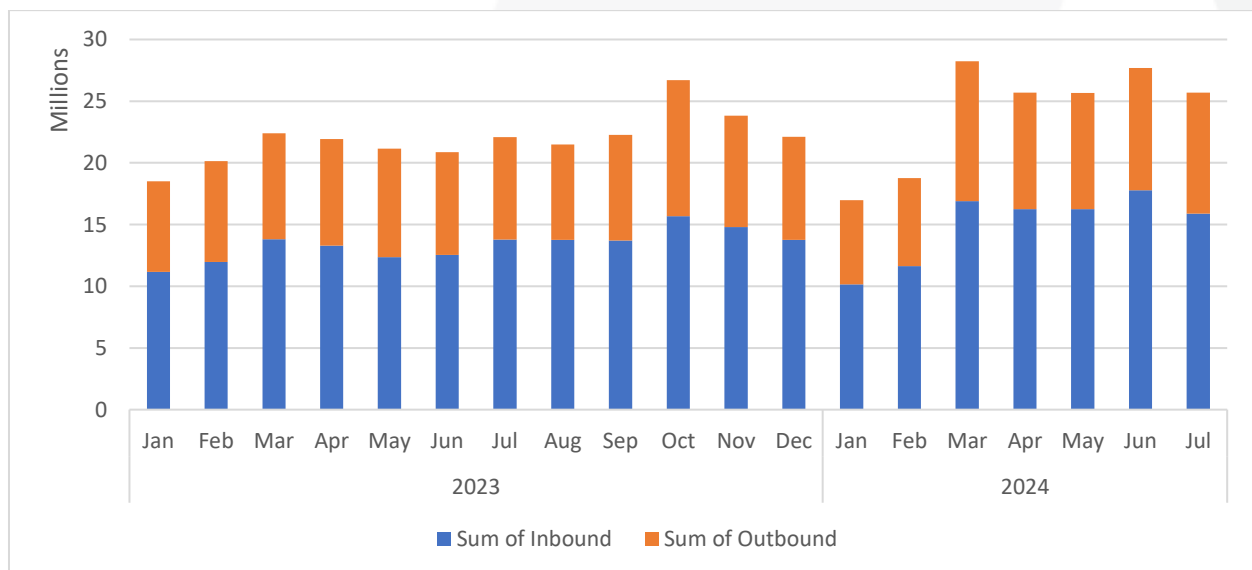
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	26-Aug	27-Aug	28-Aug	29-Aug	30-Aug	31-Aug	01-Sep	Week
Volume inbound	436 457	218 318	409 793	191 653	489 281	261 585	1 521 353	3 528 440
Volume outbound	210 505	202 325	280 101	186 468	290 812	224 753	1 242 024	2 636 988
Total	646 962	420 643	689 894	378 121	780 093	486 338	2 763 377	6 165 428

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

The daily average of air cargo handled at ORTIA in the previous week amounted to **504 063 kg** inbound (↓7%, w/w) and **376 713 kg** outbound (↑6%), resulting in an average of **880 775 kg**. Despite this week's decrease, the industry remains significantly up versus last year (↑13% versus August 2023) and still down on pre-pandemic levels (↓10% versus August 2019).

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

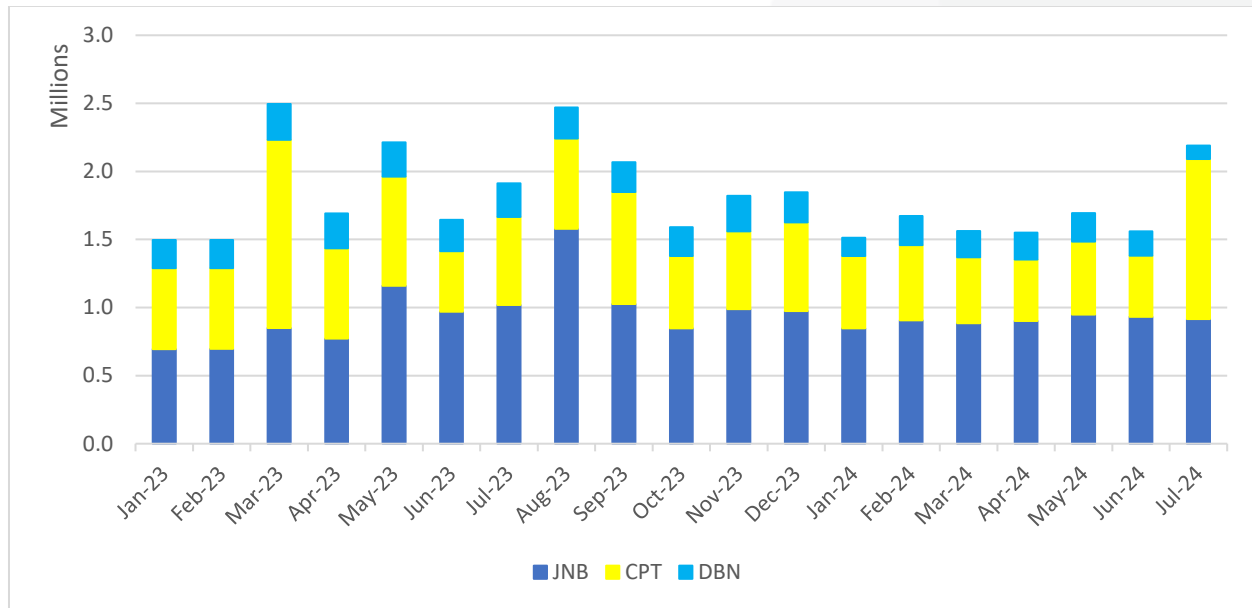


Courtesy of ACOC. Updated: 14/08/2024.

b. Domestic air cargo

The following figure shows the movement since 2023:

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 06/09/2024.

3. SARS Merchandise Trade Statistics: July

SARS released its latest "Merchandise Trade Statistics" for July¹¹, with the headline showing a preliminary monthly trade surplus of **R17,6 billion**. Monthly trade shows that exports increased from June by **↑1,8%** (m/m), while imports also increased – by **↑6,6%** (m/m). The YTD figures show a trade surplus of **R85,3 billion**, significantly improving from the **R30,3 billion** trade surplus recorded in 2023. Annually, export flows for July 2024 were **R175 billion** and **↑1,9%** (y/y) higher compared to July 2023, while import flows were **↑1,1%** lower compared to 2023, having increased from **R157,4 billion** in the current period. The volumes have followed the YTD values, as evidenced by *Figure 2*.

Regionally, trade with BELN countries for June resulted in a trade surplus of **R11,4 billion** – from exports of **R17,4 billion** and imports of **R5,9 billion**. Exports to our neighbouring countries increased by **↑7,0%** (m/m) between June and July, with imports also increasing (and significantly, so) – **↑14,7%** (m/m) – over the same period. The cumulative figures for the year point to a substantial positive trade balance with BELN countries, similar to last year – from **R69,7 billion** in 2023 to **R76,5 billion** in trade balance surplus for 2024.

4. 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 decreased by around **two and a half hours**, averaging **13,5 hrs** (↓15%, w/w) for the week.

¹¹ SARS. 30/08/2024. [Trade Statistics: July 2024](#).

- In contrast, the greater SADC region (excluding South African controlled) increased slightly – by around **an hour and a half** and averaged **~7,3 hrs (↑28%, w/w)**.
- **Traffic congestion and protest action on major South African roads:**
 - N3 Traffic: A video showed a massive queue of heavy vehicles on both lanes of the N3 near Nottingham towards Durban. Trucks were removed to reduce congestion.
 - Baobab Tollgate Protest: A protest was attempted at Baobab Tollgate, but heavy police presence prevented traffic disruption.¹²
 - N1 Protest: A community protest regarding service delivery and electricity occurred on the N1 between Solomondale and Botlokwa, with police ensuring traffic movement.
- **Beitbridge security incidents:**
 - A truck driver's belongings were stolen at the Southbound Yard at Beitbridge. Transporters expressed anger due to the \$207 cost of using the entry/exit point.
 - Four similar incidents were reported in the past month, prompting enhanced security measures, including plainclothes officers and improved coordination between ZRP and Zimra.
- **Mamuno OSBP completion and trial run:**
 - The new One-Stop Border Post (OSBP) at Mamuno is nearing completion, with a trial run on 2 September.
 - New procedures, including better data exchange, pre-clearance, and itemised cargo declarations, are being implemented to improve cross-border processes.
- 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 – Delays¹³ summary – South African borders (both directions)

Border Post	Direction	HGV ¹⁴ 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	7,2	28,0	13 440	3 136
Beitbridge	Zimbabwe-SA	400	3,3	2,2	9,6	12 000	2 800
Groblersbrug	SA-Botswana	249	0,5	2,4	27,0	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	1,3	10,1	7 380	1 722
Tlokweng	Botswana-SA	29	0,4	0,2	0,4	870	203
Vioolsdrift	SA-Namibia	30	0,1	1,1	4,4	900	210
Noordoewer	Namibia-SA	20	0,2	0,3	2,2	600	140
Nakop	SA-Namibia	30	0,3	0,5	3,0	900	210
Ariamsvlei	Namibia-SA	20	0,2	0,3	0,6	600	140
Skilpadshek	SA-Botswana	264	0,5	2,5	15,1	7 920	1 848

¹² Siaga, T. 02/09/2024. [Musina residents threaten to shut down tollgate over rising crime at Beitbridge border.](#)

¹³ 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.

¹⁴ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Border Post	Direction	HGV ¹⁴ Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Pioneer Gate	Botswana-SA	61	2,3	1,0	1,5	1 830	427
Lebombo	SA-Mozambique	1 446	0,1	1,2	7,2	43 380	10 122
Ressano Garcia	Mozambique-SA	125	2,5	0,3	1,4	3 750	875
Sum/Average		3 574	1,2	1,5	8,0	107 220	25 018

Source: TLC, FESARTA, & Crickmay, week ending 01/09/2024.

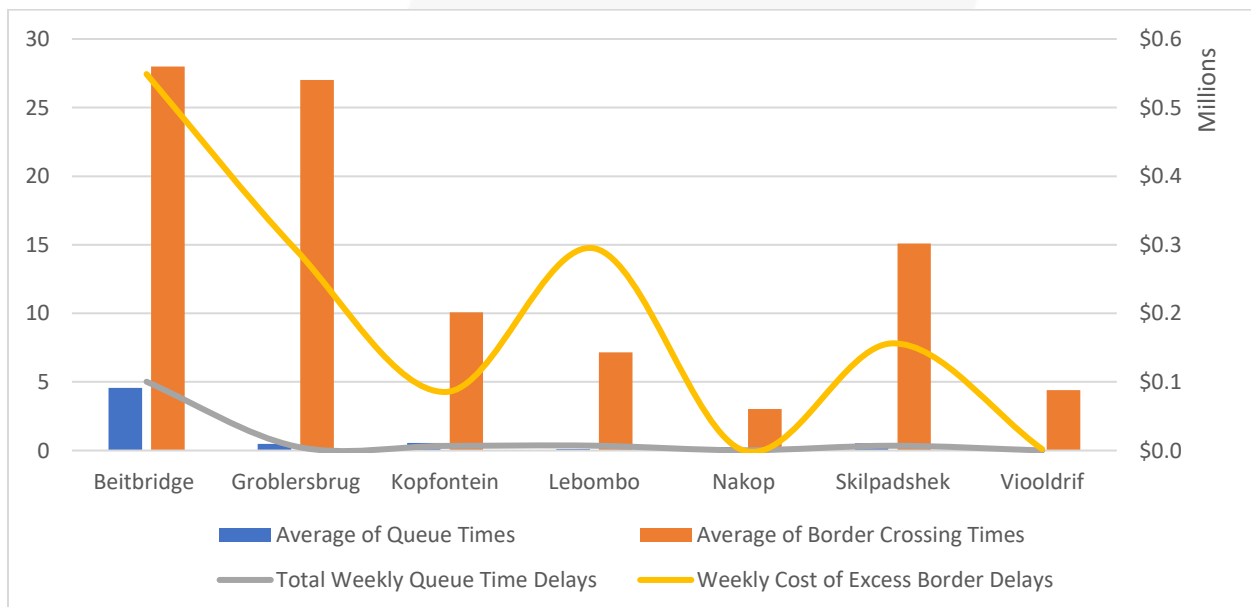
Table 6 – Delays summary – Corridor perspective

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	0,5	2,1	16,0	9 600	2 240
Central Corridor	798	0,0	0,1	2,3	23 940	5 586
Dar Es Salaam Corridor	1 819	43,9	1,4	18,5	54 570	12 733
Maputo Corridor	1 571	1,3	0,7	4,3	47 130	10 997
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 650	15,2	1,6	12,3	109 500	25 550
Northern Corridor	2 817	0,0	0,2	1,4	92 520	21 588
Trans Caprivi Corridor	116	1,2	3,2	46,0	3 480	812
Trans Cunene Corridor	100	2,2	0,0	0,0	3 000	700
Trans Kalahari Corridor	355	1,3	1,1	5,5	10 650	2 485
Trans Oranje Corridor	100	0,2	0,6	2,6	3 000	700
Sum/Average	11 773	8,1	0,9	7,9	361 200	84 280

Source: TLC, FESARTA, & Crickmay, week ending 01/09/2024.

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

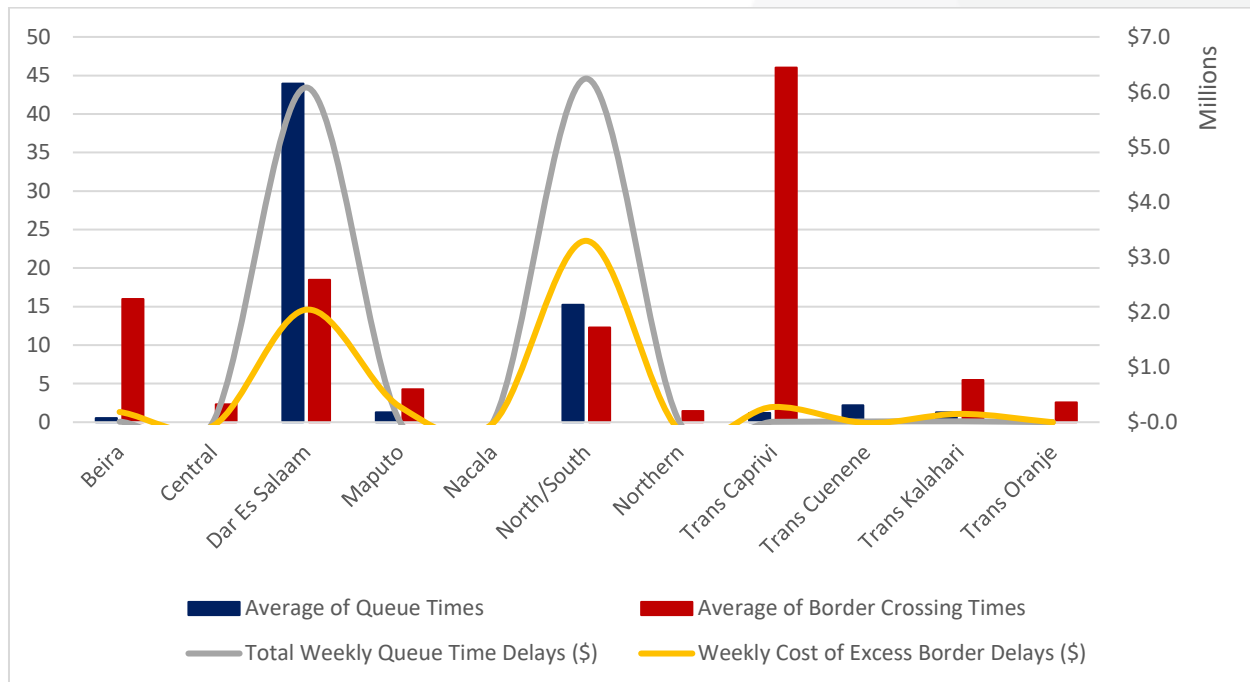
Figure 12 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 01/09/2024.

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 01/09/2024.

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 (R220 million)**. Furthermore, the week's average cross-border transit times hovered around **~7,9 hours** (up by **~1,2 hours** from the **~6,7 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$6 million (R106 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$18,4 million (R326 million)**, up by **~R16 million** or **↑4,7%** from **~R310 million** in the previous report).

5. International Update

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

a. Global shipping industry

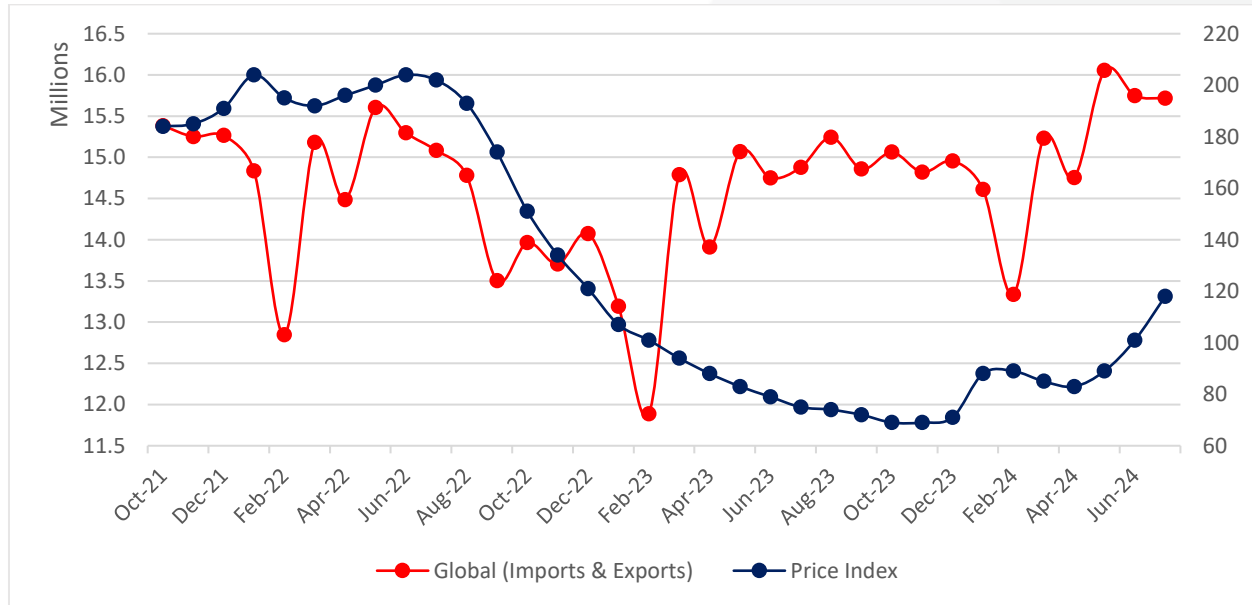
i. Global container trade statistics - July

The latest container throughput figures for July from Container Trade Statistics (CTS) show that container volume has decreased by a smidgen this month – down by **↓0,2%** (m/m) after a decrease of **↓1,9%** (adjusted) in June. These figures are significantly better than Drewry's *Nowcast model*, which predicted a **↓4,1%** (m/m) decline for July, as reported last week.¹⁵ Annual throughput is up by **↑5,6%** (y/y), as global demand for complex goods has undoubtedly recovered and remains relatively strong. After the slight decrease in container throughput in June, most trade lanes are similar to last month, with the only noteworthy change being a **↓5,2%** (m/m) reduction in Australasia and Oceania. All of the other seven

¹⁵ Drewry. 30/08/2024. [Port Throughput Indices – August 2024](https://www.drewry.com/Port-Throughput-Indices-August-2024).

regions remained within **2%** of June’s throughput figures – much more stable than predicted by Drewry. The global price index (dry and reefer combined) increased over this period by **↑16,8%** monthly and a substantial **↑57,3%** yearly. The following figure illustrates the global container throughput and price index since October 2021:

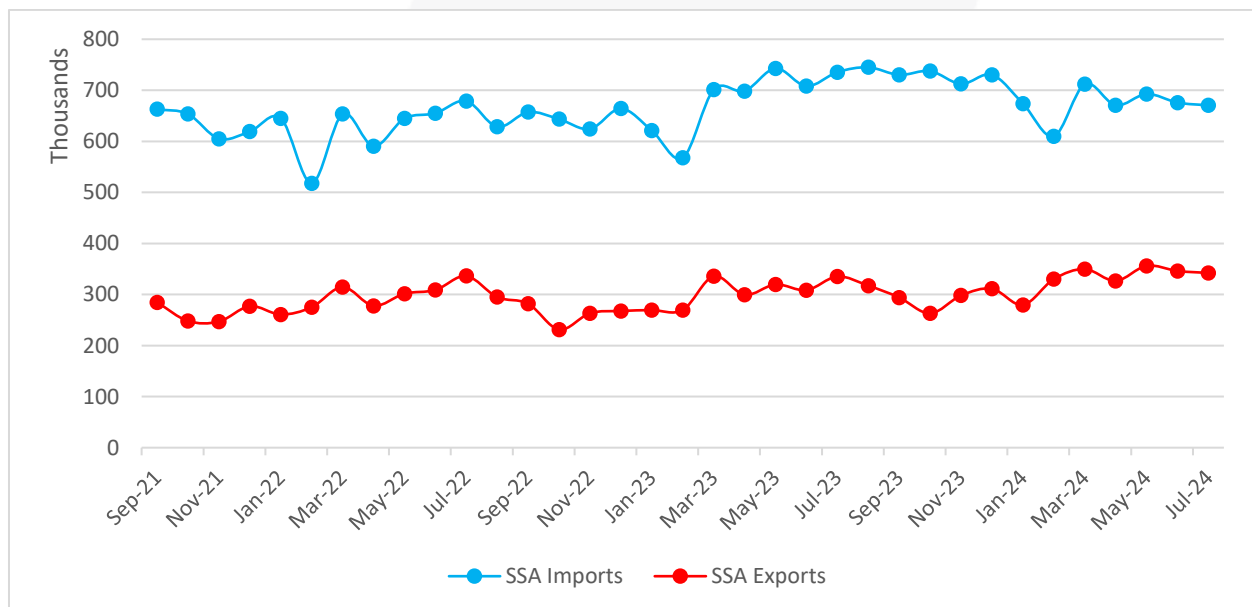
Figure 14 – Global Containerised Throughput (TEUs) and price index



Source: Calculated from [CTS](#)

Container throughput reached a total of around **15,7 million TEUs** – some **300 000 containers** off the record throughput of May. The following figure shows Sub-Saharan African trade over the same period, with a **↓1,1%** (m/m) reduction in containers exported and a **↓0,8%** (m/m) reduction in containers imported:

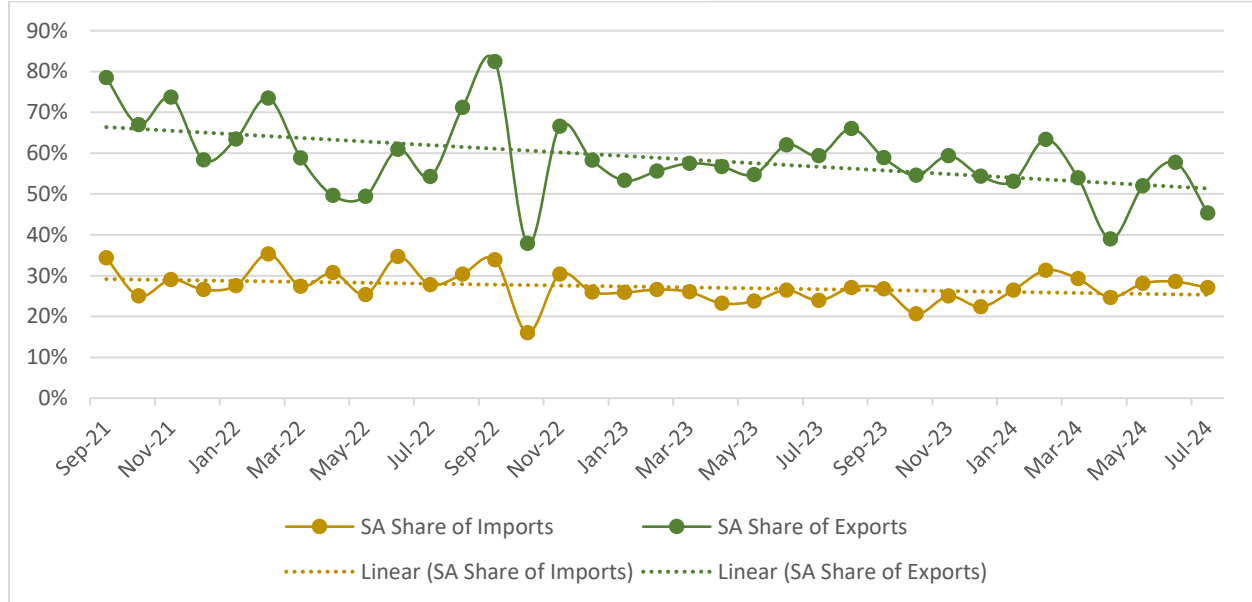
Figure 15 – Sub-Saharan Africa Containerised Throughput (TEUs)



Source: Calculated from [CTS](#)

Despite monthly decreases for the SSA region, yearly SSA trade exports are up – by **↑2,1%** in July. Nevertheless, annual trade remains down for imports at **↓8,8%**. When adding South Africa’s share to SSA trade, we see a continuation in the directional flow, as Transnet registered some low throughput numbers in July (**336 599 TEUs**):

Figure 16 – South Africa's share in regional containerised throughput (% share)



Source: Calculated from [CTS](#)

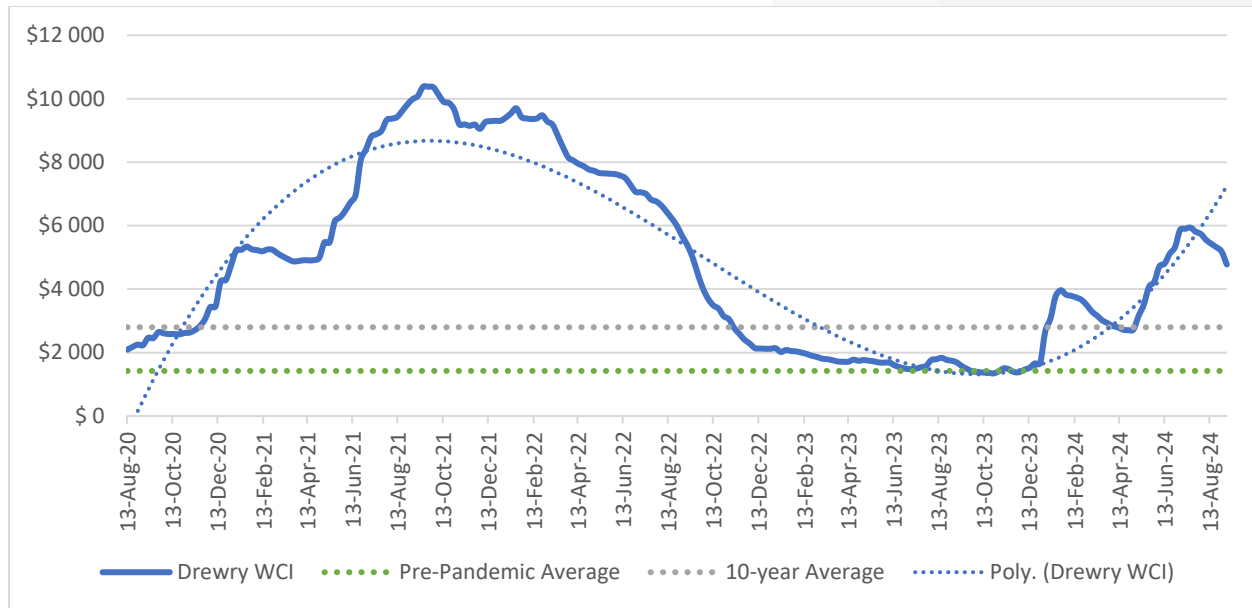
When measuring these, South Africa accounted for **27%** of SSA imports and **45%** of SSA exports in July, according to TNPA figures. These respective shares are significantly less than the highs of **35%** in February 2022 for imports and **82%** in September 2022 for exports.

ii. Global container freight rates

Container spot freight rates between Asia and Europe have dropped sharply, with double-digit declines in both the Asia-North Europe and Asia-Mediterranean trades. Drewry’s "World Container Index" recorded a significant **↓14%** drop on the Shanghai-Rotterdam route, while Xeneta’s XSI Asia-Europe price also fell **↓10%**. Overall, the composite index is down by **↓7,8%** (or **\$406**), trading at **\$4 775** per 40-ft container.¹⁶ The decline is driven by weakening demand, as July shipment volumes from Asia to Europe began to fall. This led to predictions of further rate drops in the coming months despite carriers' efforts to reduce capacity through blank sailings (this week trending at **13%**—the highest figure recorded recently).¹⁷

¹⁶ Drewry. 05/09/2024. [World Container Index](#).
¹⁷ Drewry. 06/09/2024. [Cancelled Sailings Tracker](#).

Figure 17 – World Container Index



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

The latest spot-rate composite index is **↓54%** below the pandemic peak (**\$10 377**) but **↑236%** more than the 2019 average (**\$1 420**). Drewry expects Asia-Europe rates to decline in the upcoming weeks. Meanwhile, charter rates were unchanged again this week, as the *Harper Petersen Index* (Harpex) traded around 1 981 points on Friday, but it is still up by **↑85%** compared to this time last year.¹⁸

Regarding shipping line profits, the global container shipping industry saw profits surge to more than **\$10 billion** in the second quarter due to record volumes and rising freight rates after Red Sea diversions, according to a new analysis. Net income for the world’s major container carriers, including Maersk and Cosco, almost doubled from the first three months of the year and topped the **\$8,88 billion** haul from the second quarter of 2023, according to a report released Saturday by industry veteran John McCown.¹⁹

iii. Further developments of note

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

1. Services set to shut down as 'super typhoon' heads for South China:

- China is preparing for the impact of Super Typhoon Yagi, which is expected to be the strongest storm to hit the country in nearly a decade, with sustained winds of 210km/h.²⁰
- The storm previously hit the Philippines and is projected to affect Guangdong and Hainan provinces, causing significant flooding and disruptions to air and sea operations.
- While major logistics hubs like Shenzhen and Hong Kong are not expected to experience severe disruptions, flight cancellations and port closures are anticipated in Hainan and nearby regions.

2. Hamburg's city parliament approves MSC purchase of a stake in HHLA:

- The Hamburg City parliament has approved MSC’s acquisition of a **49,9% stake in HHLA**, despite opposition from dockworker unions and political parties, pending European Commission competition approval.²¹

¹⁸ Harper Petersen Index. 30/08/2024. [HARPER PETERSEN Charter Rates Index](https://www.harperpetersen.com).

¹⁹ Bloomberg. 04/09/2024. [Container Carrier Profits Soar on Record Volumes, Higher Rates](https://www.bloomberg.com).

²⁰ Goldstone, C. 09/09/2024. [Services set to shut down as 'super typhoon' heads for South China](https://www.goldstone.com).

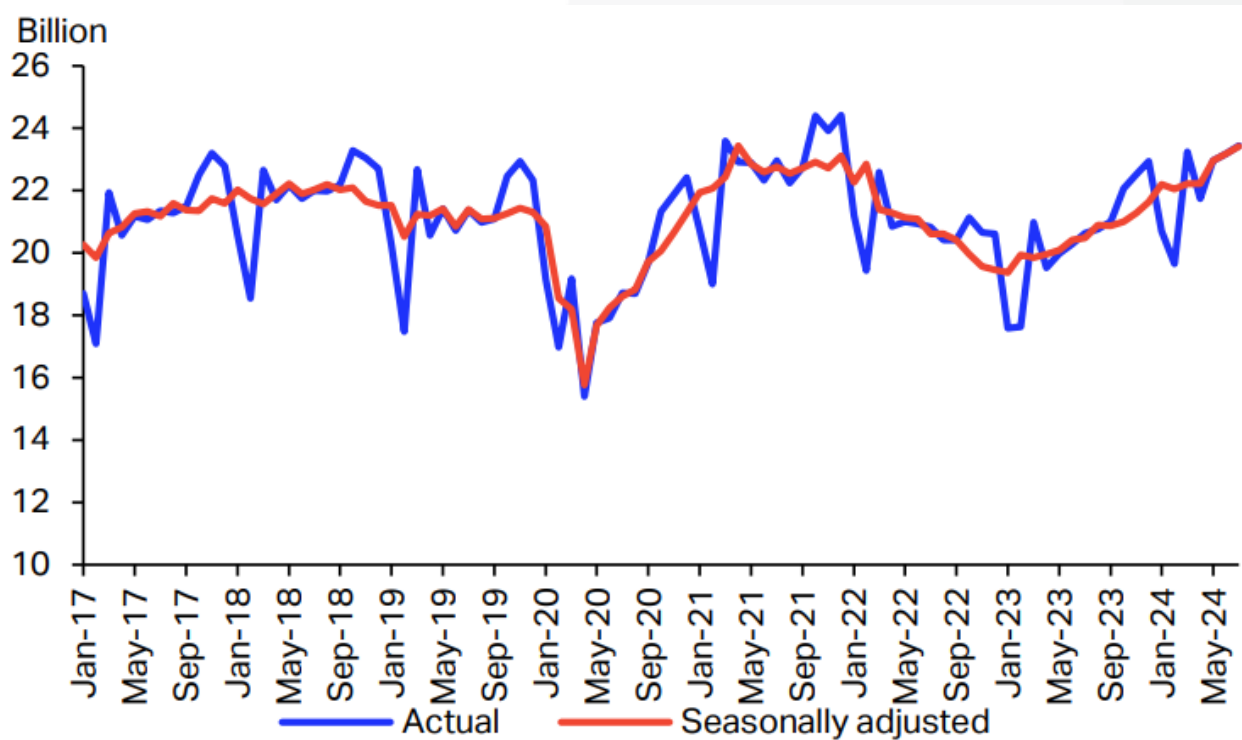
²¹ Van Marle, G. 05/09/2024. [Hamburg's city parliament approves MSC purchase of stake in HHLA](https://www.vanmarle.com).

- b. The deal includes commitments such as €450 million in equity capital, €775 million in terminal investments, and no workforce redundancies for five years. MSC also agreed to move its German headquarters to Hamburg and ensure at least 1 million TEU throughput annually by 2031.

b. Global air cargo industry

IATA released their latest “Air Cargo Market Analysis” for July.²² Air cargo demand, measured in cargo tonne-kilometres (CTKs), grew by **↑13,6%** year-on-year, with international operations rising by **↑14,3%**. Capacity, measured in available cargo tonne-kilometres (ACTKs), increased by **↑8,3%**, driven by a **↑12,8%** growth in international belly capacity and a **↑6,9%** increase in freighter capacity. The air cargo sector benefits from global trade, e-commerce, and maritime shipping constraints, positioning it for a strong year. In July, global manufacturing showed slight expansion, while export orders contracted. Inflation remained stable across major economies, except for a slight rise in China. The following shows the development of volumes since January 2017:

Figure 18 – Industry CTKs (last five weeks)



Source: [IATA](http://www.iata.org)

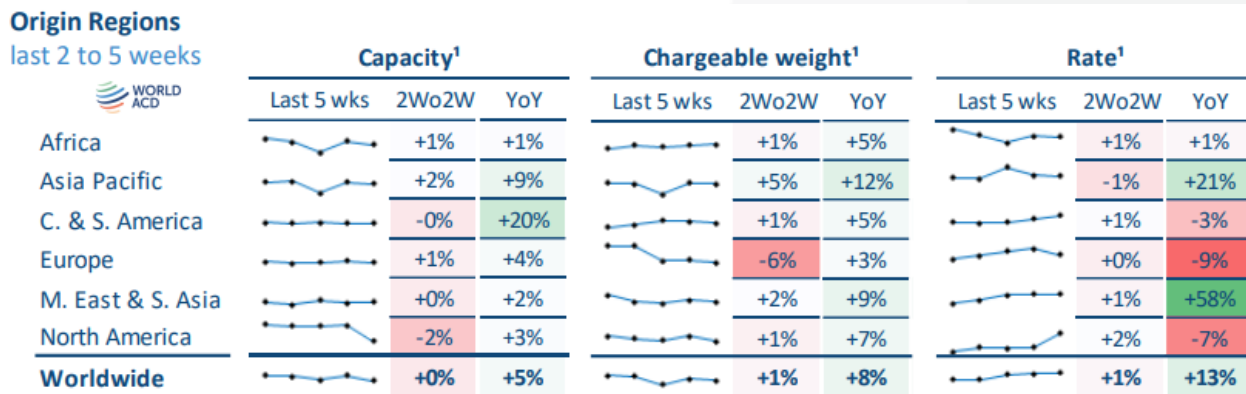
African airlines saw **↑6,2%** year-on-year demand growth for air cargo in July – the lowest of all regions and their lowest recorded figure in 2024. Demand in the Africa–Asia market increased by **↑15,4%** compared to July 2023. July capacity increased by **↑10,5%** year-on-year.

In the more frequent numbers from Market ACD, global air cargo demand and rates remained strong in August, with tonnage increasing by **↑10%** (y/y) and rates rising by **↑12%**. Rates from key regions, including

²² IATA. 28/08/2024. [Air Cargo Market Analysis July 2024](http://www.iata.org).

Asia Pacific (↑22%) and the Middle East and South Asia (MESA, ↑58%), saw significant annual growth despite slight monthly declines in tonnage:

Figure 19 – Capacity, weight, and rates by region (last five weeks)



Source: [World ACD](#)

Average yields reached **\$2,49 per kilogram**. Cargo from Japan rebounded after Typhoon Ampil but remained below pre-storm levels. Meanwhile, disruptions in Bangladesh and the Red Sea contributed to rising rates. A busy fourth-quarter peak is expected, driven by e-commerce and potential shifts from sea to air cargo due to port disruptions in the US.

In other air cargo news, Alibaba's Cainiao has launched twice-weekly airfreight services via Georgian Airlines between Xi'an, China, and Liege, Belgium. Shipments receive fast customs clearance at Cainiao's e-hub for onward delivery across Europe. Meanwhile, Lufthansa Cargo plans to invest **€600 million** to modernise its Frankfurt hub over the next six years, aiming to upgrade its handling, storage, and IT facilities without disrupting operations.²³

ENDS²⁴

²³ Lennane, A. 06/09/2024. [Air cargo round-up: Cainiao into Liege; Lufthansa upgrades.](#)

²⁴ **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.

Simpler, Safer, Faster

- We **reduce your administrative burden** by completing the application on your behalf.
- We abide by a strict **Non-Disclosure Agreement** and information shared with us will never be used for any other purpose.
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