

Cargo Movement Update #211¹

Date: 10 November 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 (TEUs ⁴)	33 302	37 940	71 242	33 827	43 495	77 322	↓8%
Air Cargo (tons)	4 015	2 573	6 588	4 317	3 127	7 444	↓11%

Monthly Snapshot

Figure 1 – Cyclical⁵ cargo volume, year on year (% growth)

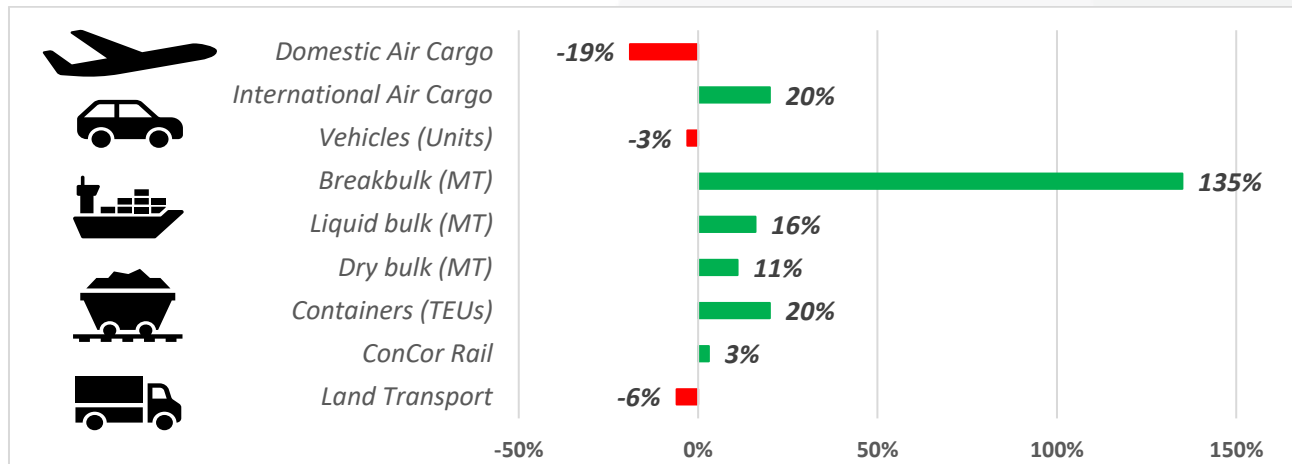
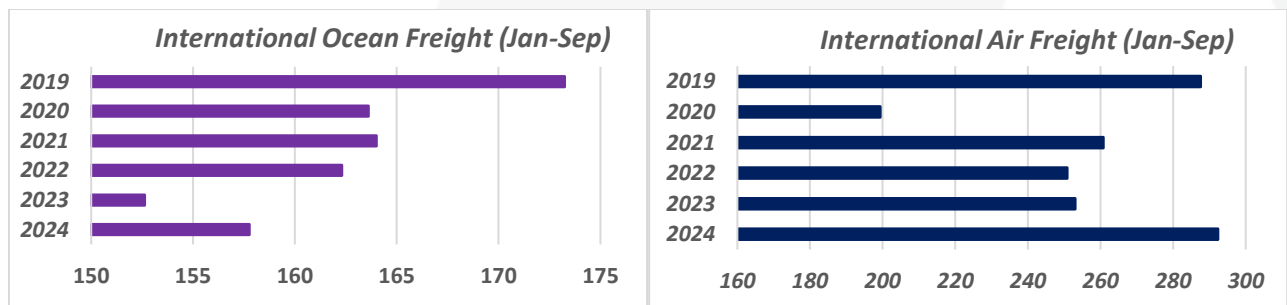


Figure 2 – Year-to-date flows 2019-2024⁶: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~10 177 TEUs was handled per day, with ~11 302 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 3 276 containers, up ↑1% from last week.
- Cross-border queue: ↓1,7 hrs; transit: ↓1,4 hrs; SA borders: 9,1 hrs (↓35%); SADC: 3,5 hrs (↓22%).
- The idle cellular container fleet hit a record low of 0,7% from January–October due to the Red Sea crisis.
- Global container rates have continued to increase this week – by ↑7,2% (or \$231), trading at \$3 444.
- Global air cargo rates rose by ↑2% to \$2,71/kg, despite a slight decrease in cargo volume (↓1%, w/w).

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 211th 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 Container volumes are now reported in TEUs to align with TPT. Furthermore, we will change the period of reporting to Monday-Sunday, as per TPT.

⁵ 'Monthly' means the last months' worth of available data compared to the same month in the previous year—all metrics: Sep vs Sep.

⁶ Total YTD; ocean = bulk cargo in a million metric tonnes, as reported by TNPA; air = cargo to and from all airports in a million kilograms.

Executive Summary

This update provides a consolidated overview of the South African logistics network and the current state of international trade. In our container terminals, an average of **10 177 TEUs** was handled per day, down from **11 046 TEUs** last week. Port operations were mainly construed by inclement weather, vacant berths, equipment breakdowns and shortages. Adverse weather presented some operational difficulties in Cape Town this week, as equipment breakdowns and rainy weather ensured operational delays in Durban. A vacant berth accompanied by strong winds and high swells was the primary source of delays in the Eastern Cape, while several vessels were delayed in Richards Bay due to inclement weather. This week, TNPA issued an RFI for a pilot project to utilise greener fuels for its selected diesel-powered tugboat fleet. Additionally, at the start of the week, the ConCor line was occupied between 06:00 and 18:00 on Monday for monthly maintenance operations. The latest reports suggest that there has yet to be an indication about refurbishing the collapsed bridge on the South Coast rail line.

Globally, the re-election of Donald Trump could reintroduce protectionist policies, notably steep tariffs, disrupting global trade, particularly with the EU and Asia. The “*pre-tariff rush*” by U.S. importers may temporarily spike container imports, pressuring logistics networks. South Africa faces heightened risks, as stronger ties with emerging markets, especially China, may reduce its trade flexibility amid geopolitical tensions, and AGOA’s uncertain renewal could impact U.S. market access. The global container fleet saw a record low idle rate due to demand shifts from the Red Sea crisis, while port congestion persists, with Durban Port stable at a queue-to-berth ratio of **0,63**. Rising container demand and ongoing volatility underscore the need for resilient supply chain strategies. Other developments included **(1)** the Port of Valencia slowly getting back to work after floods from rainstorms, **(2)** ripples from a standstill at strike-bound Canadian ports, and **(3)** Typhoon Kong-ray creating congestion at Shanghai, Ningbo and Kaohsiung.

Air cargo volume significantly decreased this week. The daily average of air cargo handled at ORTIA in the previous week amounted to **573 543 kg** inbound (**↓7%**, w/w) and a low **367 637 kg** outbound (**↓18%**). Despite the significant decrease in international air cargo volumes, this week’s average remains similar to the figures registered last year (**↓0,4%** versus October 2023) and also similar to pre-pandemic (**↓1%** versus October 2019). Therefore, despite this week’s decrease, international air cargo to and from ORTIA remains robust. Internationally, the Asia Pacific and Europe rate rise lift global prices; however, tonnages flown in week 44 were down, week-on-week, on a worldwide basis and from all the main origin regions, although that mainly reflects national holidays in various parts of the world on 1 and 2 November.

In the regional cross-border road freight trade, the average queue times decreased by around **an hour and a half** from last week, as the transit times also decreased by almost **the same magnitude (↓1,4 hours)**. The median border crossing times at South African borders decreased by a considerable **five hours**, averaging **9,1 hrs (↓35%, w/w)** for the week. In contrast, the greater SADC region (excluding South African controlled) also decreased – by around **an hour** and averaged **~3,5 hrs (↓22%, w/w)**. On average, four SADC border posts took more than a day to cross – Beitbridge, Chirundu OSBP, Forbes, and Kasumbalesa (the worst affected, taking **around a day and a quarter** to cross from both sides). Other developments included **(1)** Mozambique protests and border disruptions, **(2)** Walvis Bay logistics demand surge, and **(3)** Botswana public holiday for Presidential Inauguration.

In summary, the escalation in Mozambique and the subsequent situation on the Lebombo border underscore critical vulnerabilities in South Africa's logistics network. The recent turmoil reveals that we must rely on more than one port, border post, or transport mode to meet our freight demands. Instead, there is a pressing need for cohesive operations across all border posts, ports, and transport modalities to ensure a

resilient and efficient logistics infrastructure. This situation emphasises the importance of collaboration, cohesion, and stakeholder engagement within the region to stabilise trade and address disruptions that threaten economic stability and growth. Moreover, South Africa's strategic reliance on the Maputo Corridor for international competitiveness has highlighted the need for authorities – including the SADC leadership – to act decisively in stabilising infrastructure and restoring trade flows for sustained economic integration and resilience across the Southern Africa region.

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1. Ports Update

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

a. Container flow overview

The following tables indicate the container flows reported for the last seven days. As mentioned across the previous two weeks, we have changed the reporting unit to TEUs and the week showing Mondays to Sundays to align with TPT.

Table 2 – Container Ports – Weekly flow reported for 4 to 10 November (measured in TEUs)

7-day flow reported (04/11/2024 – 10/11/2024)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	3 903	27 318	↓16%
New Pier (Pier 1)	1 873	13 112	↑3%
Cape Town Container Terminal	1 243	8 703	↓16%
Ngqura Container Terminal	2 286	16 002	↑49%
Port Elizabeth Container Terminal	233	1 631	↓29%
Other	639	4 476	↓47%
Total	10 177	71 242	↓8%

Source: Calculated from TPT, 2024. Updated 10/11/2024.

A decreased average of ~10 177 TEUs (↓8%) was handled per day for the last week (4 to 10 November, Table 2), compared to the projected average of ~11 302 TEUs (↓10% actual versus projected) noted in last week's report.

For the coming week, an increased average of ~11 302 TEUs (↑11%) is predicted to be handled (11 to 17 November, Table 3). Port operations were mainly constrained by adverse weather, vacant berths, equipment breakdowns, and shortages.

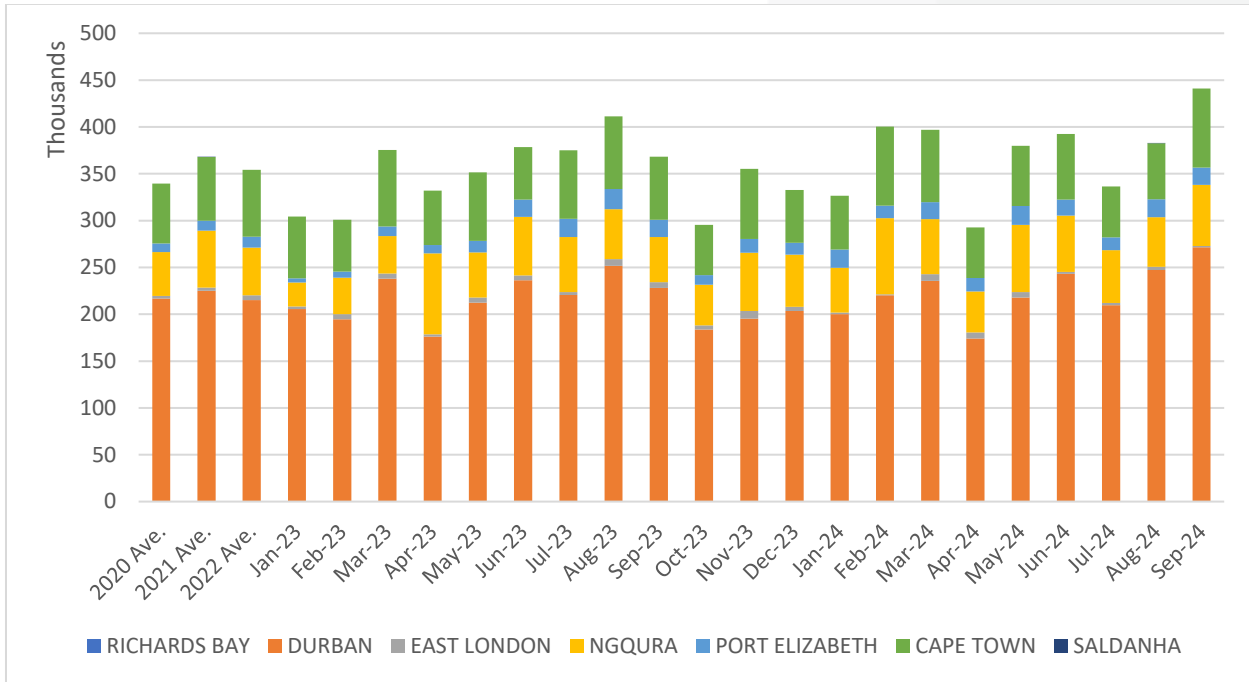
Table 3 – Container Ports – Weekly flow projected for 11 to 17 November (measured in TEUs)

7-day flow reported (11/11/2024 – 17/11/2024)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 507	31 548	↑15%
New Pier (Pier 1)	1 645	11 518	↓12%
Cape Town Container Terminal	2 317	16 216	↑86%
Ngqura Container Terminal	1 913	13 388	↓16%
Port Elizabeth Container Terminal	281	1 965	↑20%
Other	640	4 477	↑1%
Total	11 302	79 111	↑11%

Source: Calculated from TPT, 2024. Updated 10/11/2024.

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.

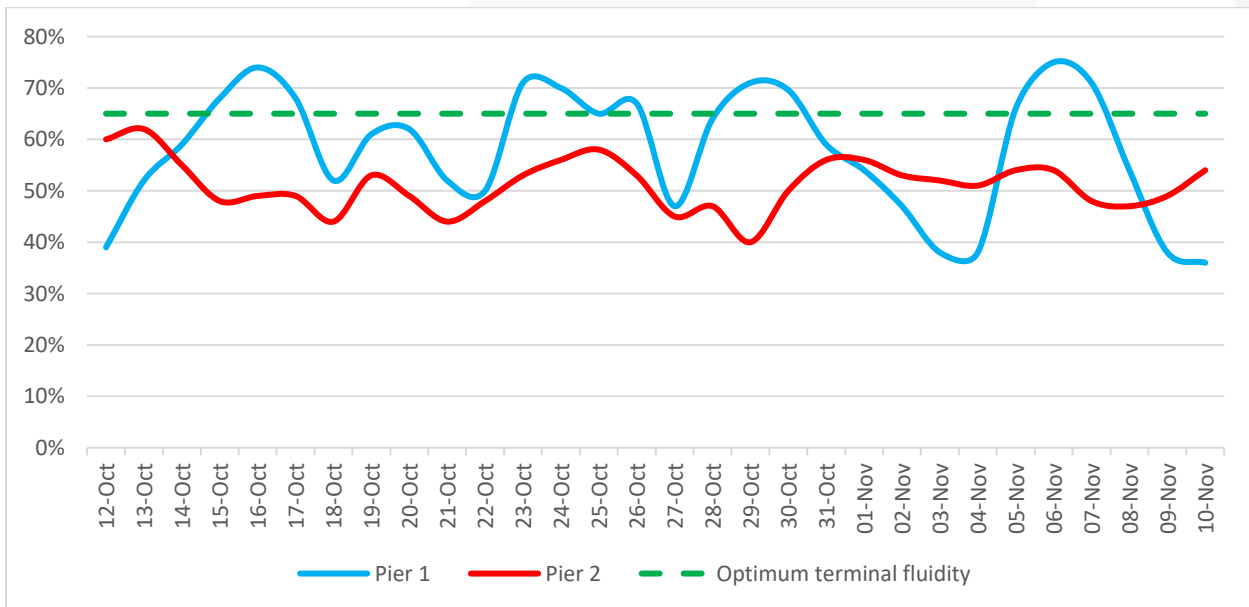
Figure 3 – Monthly flow reported for total container movement (TEUs 2020 to present, m/m)



Source: Calculated using data from TNPA, 2024, and updated 10/11/2024.

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

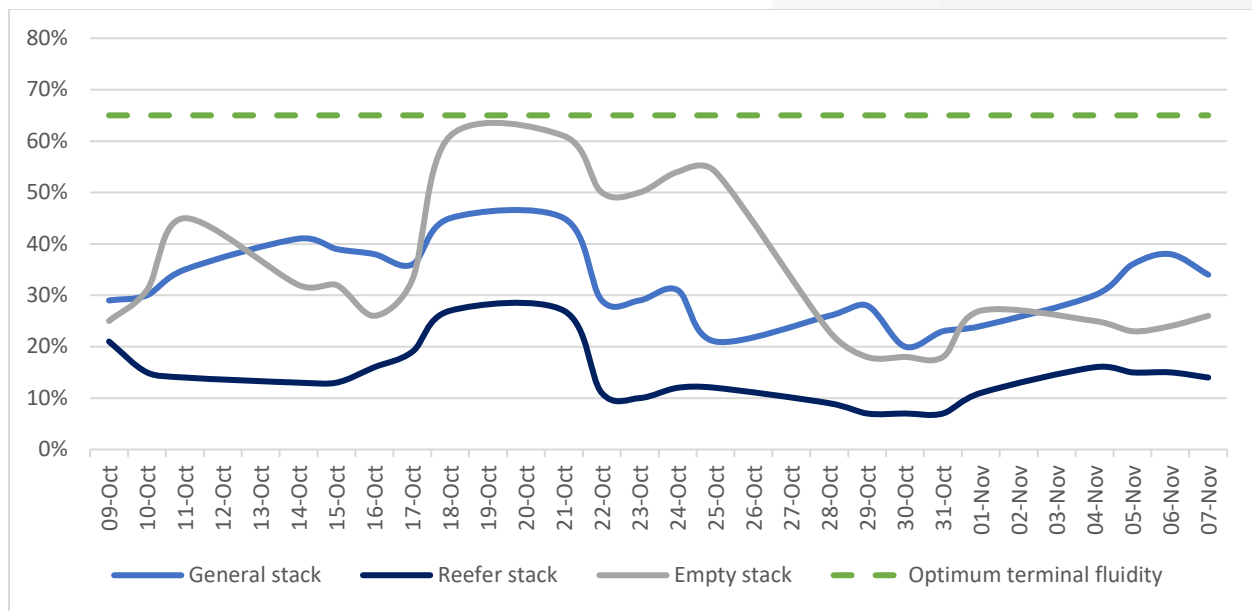
Figure 4 – Stack occupancy in DCT, general-purpose containers (12 October to present; a day on the day)



Source: Calculated using data from Transnet, 2024, and updated 10/11/2024.

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 (9 October to present, day on day)



Source: Calculated using data from Transnet, 2024, and updated 10/11/2024.

b. Summary of port operations

i. Weather and other delays

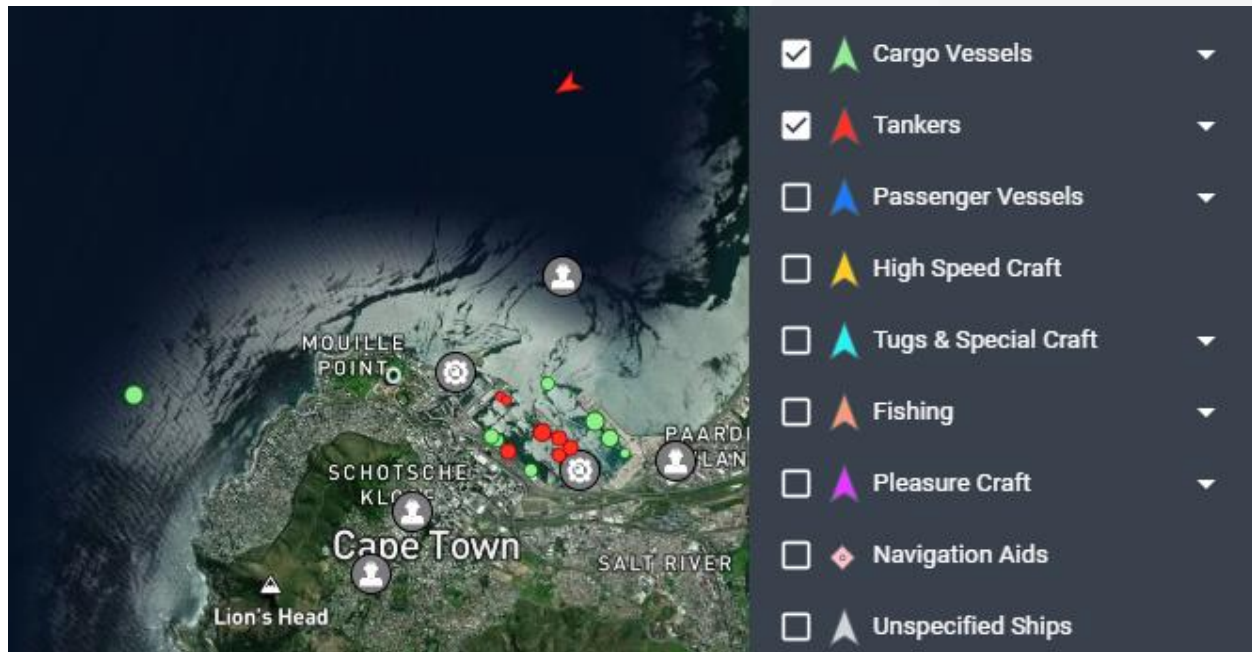
- Adverse weather presented some operational difficulties in Cape Town this week.
- Equipment breakdowns and rainy weather ensured operational delays in Durban.
- A vacant berth accompanied by strong winds and high swells was the primary source of delays in the Eastern Cape.
- Several vessels were delayed in Richards Bay due to inclement weather.

ii. Cape Town

On Friday, CTCT recorded two vessels at berth and zero at anchor, as inclement weather conditions and equipment breakdowns at berth 601 prevented optimal performance at the terminal this week. Between Monday and Friday, on the landside, the terminal managed to service 3 920 trucks while handling approximately 154 rail units. On the waterside, the terminal executed approximately 6 860 container moves across the quay during the same period. Stack occupancy for **GP containers** was recorded at **31%**, **reefers** at **11%**, and **empties** at **35%**. Additionally, the terminal operated with **six STS cranes**, **22 RTGs**, and **56 hauliers** towards the end of the week. Cranes LC6 and LC8 were out of commission for most of the week but are anticipated to return to operations before the weekend. Crane LC3 was the latest equipment casualty, with the technical team currently conducting fault-finding operations.

On Thursday, CTMPT recorded one berthed vessel and one vessel at anchor. In the preceding 24 hours, the terminal handled around 1 549 tons across the quay. On the landside, 131 trucks were processed during the same period. Towards the end of the week, stack occupancy was recorded at 7% for general cargo, 0% for reefers, and 1% for empties. The latest reports suggest that all three cranes were operational towards the end of the week after only two were operational at the start. The following container vessel was anticipated to arrive around Monday.

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



Source: Marine Traffic. Updated 10/11/2024 at 14:00.

iii. Durban

On Friday, Pier 1 recorded two vessels on berth, operated by four gangs, with another two at anchor. Stack occupancy was **54%** for **GP containers**. Between Monday and Friday, the terminal executed approximately 5 547 gate moves on the landside, with an **average TTT of ~97 minutes (↑4%, w/w)** and an **average staging time of ~66 minutes (↑14%)**. Additionally, the terminal moved approximately 6 256 TEUs across the quay on the waterside between Monday and Thursday. The terminal operated with **five STS cranes** for most of the week and had **13 RTGs** in service towards the end of the week. Additionally, STS crane QC1 experienced some challenges towards the end of the week.

Pier 2 had four vessels on berth and two at anchorage on Friday, as adverse weather and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **47%** for **GP containers**. The terminal operated with **nine and ten gangs** and moved approximately 10 788 containers across the quay between Monday and Thursday on the waterside. Between Monday and Friday, there were approximately 10 423 gate moves on the landside, with an **average TTT of ~87 minutes (↓22%, w/w)** and a **staging time of ~96 minutes (↓36%)** for the week. Approximately 2 026 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **39 and 50** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **51%** during this period.

Durban's MPT terminal recorded three vessels on a berth on Friday and one vessel at the outer anchorage. Stack occupancy for containers was 70%, with the breakbulk stack at 50%. In the preceding 24 hours, the terminal managed to handle 519 containers and 611 tons of breakbulk on the waterside. On the landside, 230 container trucks and 66 breakbulk RMTs were serviced. During this period, three cranes, nine reach stackers, seven forklifts, and 19 ERFs were in operation.

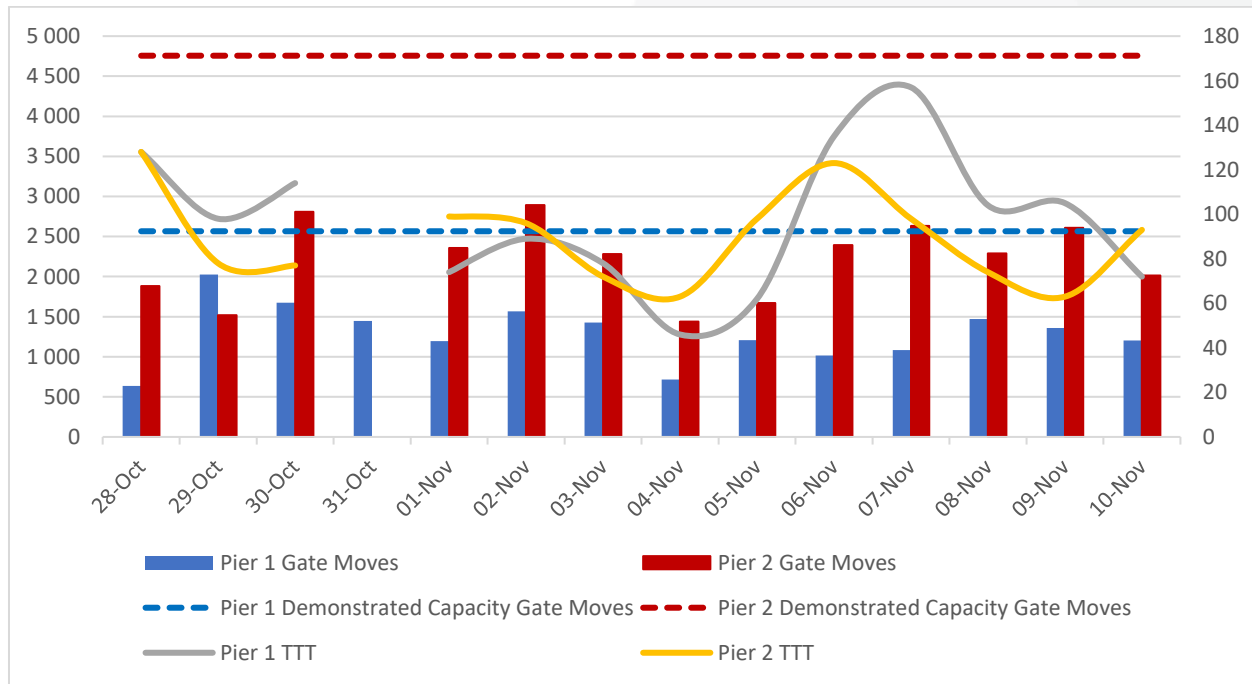
On Monday, 04 November, the Maydon Wharf MPT had one berthed vessel and zero vessels at anchor. During the 24 hours prior, the terminal handled 5 562 tons on the waterside while handling 70 RMTs on the landside. During the same period, the agri-bulk terminal recorded zero vessels on berth and none at outer

anchorage. No operations occurred at the terminal, with the next vessel anticipated to arrive around 24 November.

On Friday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with none at anchorage. In the 24 hours leading to Friday, the terminal handled 559 road and 114 rail units on the landside while handling 2 308 units on the waterside. Overall stack occupancy was 37% (Exports: 57%, Imports: 40%, Transshipments: 3%), 5% at Q&R, and 60% at G-berth. During this period, the terminal had 156 high-and heavies (abnormal loads) on hand and managed to handle 50.

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 10/11/2024.

The queue of container vessels waiting outside Durban has decreased somewhat in the last few weeks. At midday on Friday, **five** vessels were waiting for Pier 2, **five** for Pier 1, and **none** for Point terminal, with a current estimation of **at least four additional days added to the schedules** (stable from last week). 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 10/11/2024 at 14:00.

iv. Richards Bay

On Friday, Richards Bay had 12 vessels at anchor and 14 on the berth, translating to five vessels at DBT, five at MPT, two at RBCT, and two at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources on Friday. On Thursday, the coal terminal had four vessels at berth and two at anchor. The daily average for the week was relatively low – at around **157 900 tons** (**↑42%**, w/w). However, on the landside, 21 trains were serviced, slightly below the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded two vessels on berth but zero at anchor, with one drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation 24 hours before. Stack occupancy figures were recorded at 7% for reefers, 19% for reefer ground slots, and 28% for the general stack. Despite conceding around 12 operational hours to adverse weather and high swells, the terminal handled approximately 1 449 TEUs and 39 reefers on the waterside. Approximately 551 trucks were processed on the landside at an average TTT of ~32 minutes. One train was also serviced at an RTT of ~30 minutes. During the week, the terminal had seven STS cranes, 24 RTGs, and 50 hauliers in operation.

On Thursday, GCT had one vessel at berth and zero 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. Despite experiencing weather- and equipment challenges, 238 trucks were processed at a TTT of ~20 minutes on the landside, while 516 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 31% for the general stack, 3% for reefers, and 35% for reefer ground slots. Additionally, towards the end of the week, the terminal had one STS crane, one mobile harbour crane, and eight straddles available.

This week, TNPA issued an RFI for a pilot project to explore greener fuels for its diesel-powered tugboat fleet, aligning with Transnet's commitment to a low-carbon economy. The RFI seeks proposals for a technical assessment of older tugboats, focusing on diesel engine conditions and potential structural modifications. The pilot aims to retrofit these tugboats to use alternative fuels like LNG, biodiesel, hydrogen, or methanol. Successful retrofits will restore the tugboats' operational performance, enabling them to service ports more efficiently while reducing environmental impact.

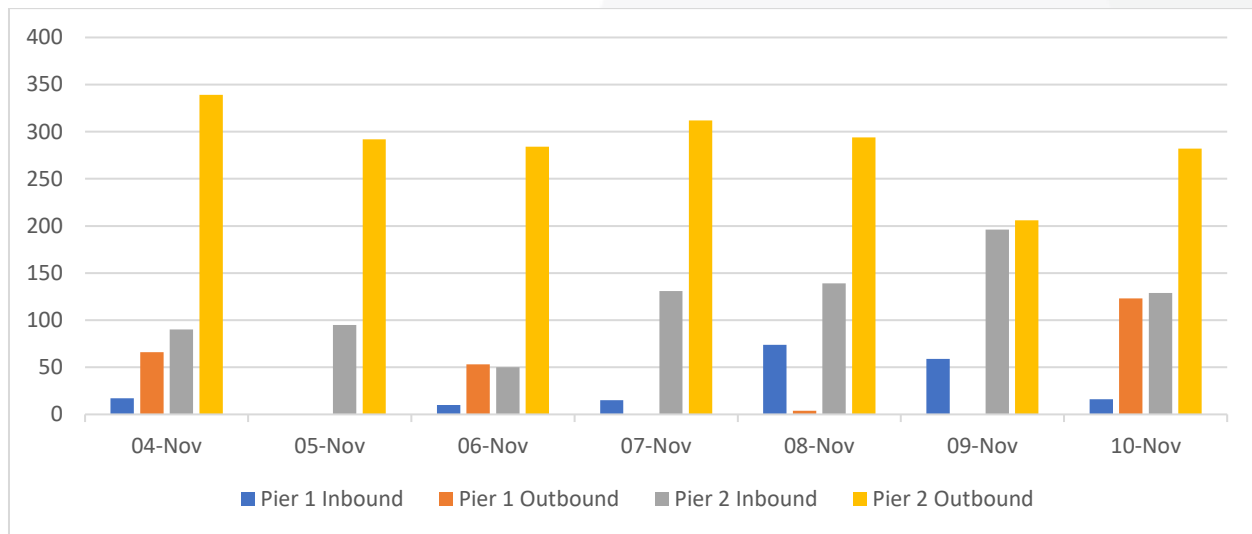
vi. Saldanha Bay

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

vii. Transnet Freight Rail (TFR)

At the start of the week, the ConCor line was occupied between 06:00 and 18:00 on Monday for monthly maintenance operations. Reports on Tuesday suggested several locations on the line between Johannesburg and Durban had sand due to the heavy rains experienced. Operational delays were incurred as a result. Additionally, towards the end of the week, DCT Pier 2 had 197 ConCor units on hand with a dwell time of 96 hours and 131 over-border units with a dwell time of 22 days. Rail containers on hand in Durban were reported as follows: Point: 70, Pier 1: 36, and DCT: 398. Furthermore, the latest reports suggest that there has been no indication yet about refurbishing the collapsed bridge on the South Coast rail line.

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



Source: Calculated using data from Transnet, 2024. Updated 10/11/2024.

In the last week (4 to 10 November), rail cargo handled out of Durban was reported at **3 276** containers, up by **↑1%** from the previous week's **2 818** 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 28 October. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *October 2023* averaged **~944 516 kg** per day.

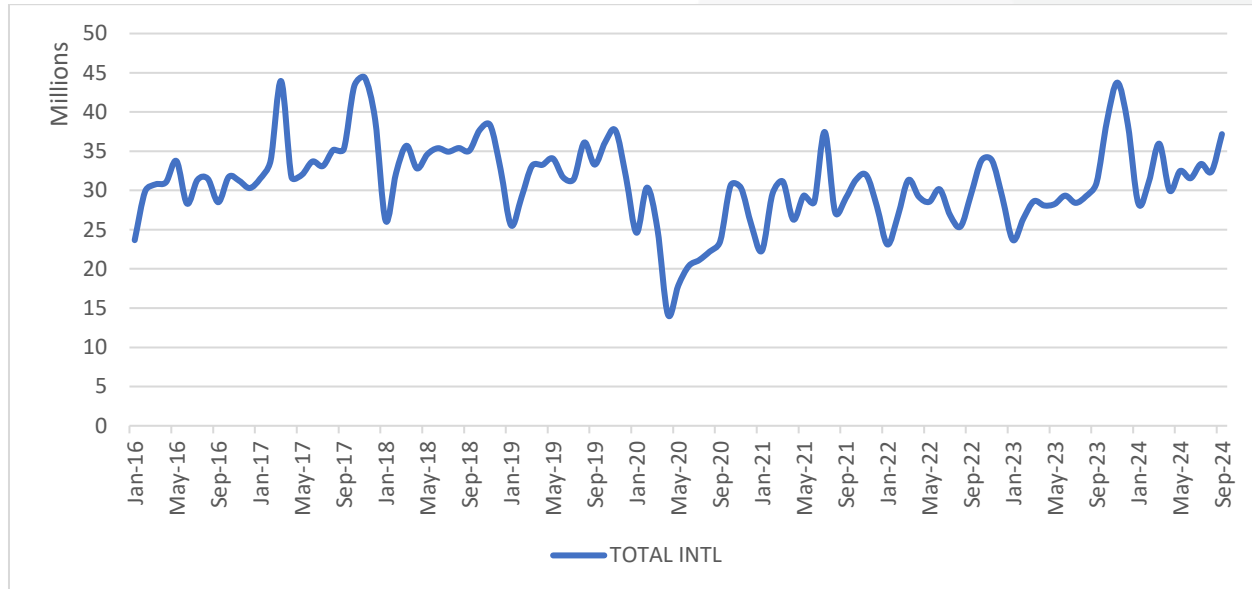
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	28-Oct	29-Oct	30-Oct	31-Oct	01-Nov	02-Nov	03-Nov	Week
Volume inbound	561 905	30 988	407 031	234 935	420 184	243 888	2 115 868	4 014 799
Volume outbound	239 281	55 890	274 577	199 406	255 686	199 399	1 349 222	2 573 461
Total	801 186	86 878	681 608	434 341	675 870	443 287	3 465 090	6 588 260

Courtesy of ACOC. Updated: 07/11/2024.

Air cargo volume significantly decreased this week. The daily average of air cargo handled at ORTIA in the previous week amounted to **573 543 kg** inbound ($\downarrow 7\%$, w/w) and a low **367 637 kg** outbound ($\downarrow 18\%$). Despite the significant decrease in international air cargo volumes, this week's average remains similar to the figures registered last year ($\downarrow 0,4\%$ versus October 2023) and also similar to pre-pandemic ($\downarrow 1\%$ versus October 2019). Despite this week's decrease, international air cargo to and from ORTIA remains very robust:

Figure 10 – International cargo from all imports (OR Tambo:~84%) – volumes per month (kg millions)

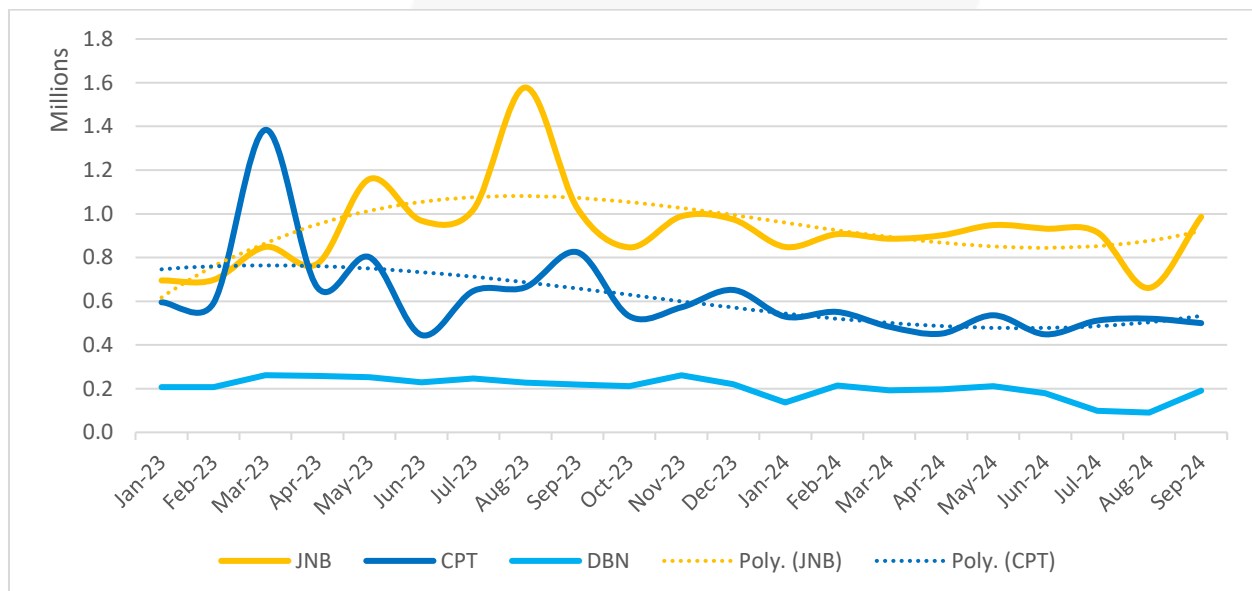


Courtesy of ACOC. Updated: 30/10/2024.

b. Domestic air cargo

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

Figure 11 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 25/10/2024.

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 decreased by a considerable **five hours**, averaging **9,1 hrs (↓35%, w/w)** for the week.
- In contrast, the greater SADC region (excluding South African controlled) also decreased – by around **an hour** and averaged **~3,5 hrs (↓22%, w/w)**.
- **Mozambique protests and border disruptions:**
 - Widespread protests in Mozambique have damaged vital infrastructure, including the Maputo Corridor and Lebombo Border, halting regional trade flows and disrupting logistics. Transporters have been advised to keep drivers and vehicles off the roads.
 - Mozambique requested South Africa to halt the processing of export vehicles. Reports indicate widespread looting, including KM4 and a bonded warehouse. As a result, the Lebombo border remains closed.
 - SAAFF and South African businesses urge SADC to intervene swiftly to mediate and stabilise the situation, ensuring the safety of people and critical trade infrastructure.
 - The crisis threatens jobs, informal trade, and small businesses, with long-term economic setbacks anticipated for the entire SADC region, particularly South Africa and Zimbabwe.
 - The Maputo Corridor, a vital trade route, is essential for regional competitiveness, and disruptions threaten international trade predictability.
- **Walvis Bay logistics demand surge:**
 - Rising volumes at the Port of Walvis Bay have driven increased demand for overland transport. BHL Group has requested assistance, seeking an additional 300 trucks to move 100 000 tonnes between Walvis Bay and Zambia over the next three months.
 - High demand has been reported for mining supplies and sulphur. Interested transporters must be registered in Botswana, Namibia, Zambia, or Zimbabwe.
- **Botswana public holiday for Presidential Inauguration:**
 - Botswana declared October 8 a public holiday to allow citizens to attend the inauguration of the country's 6th President.
 - Additionally, Thursday has been set as a half-day for government operations.

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

Table 5 – Delays⁷ summary – South African borders (both directions)

Border Post	Direction	HGV ⁸ Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	457	25,0	6,2	25,0	13 710	3 199
Beitbridge	Zimbabwe-SA	447	12,6	2,2	12,3	13 410	3 129
Groblersbrug	SA-Botswana	222	13,4	1,1	13,2	6 660	1 554
Martins Drift	Botswana-SA	195	2,6	0,3	2,4	5 850	1 365
Kopfontein	SA-Botswana	235	13,0	1,3	12,6	7 050	1 645
Tlokweng	Botswana-SA	21	0,7	0,2	0,4	630	147
Vioolsdrift	SA-Namibia	30	4,6	1,2	4,4	900	210
Noordoewer	Namibia-SA	20	1,7	0,4	1,4	600	140
Nakop	SA-Namibia	30	3,0	1,1	3,0	900	210
Ariamsvlei	Namibia-SA	20	1,0	0,4	1,0	600	140
Skilpadshek	SA-Botswana	232	0,0	0,0	0,0	6 960	1 624
Pioneer Gate	Botswana-SA	87	2,3	2,4	13,2	2 610	609
Lebombo	SA-Mozambique	1 446	5,3	0,5	5,2	43 380	10 122
Ressano Garcia	Mozambique-SA	125	1,8	0,3	1,5	3 750	875
Sum/Average		3 567	6,2	1,2	6,8	107 010	24 969

Source: TLC, FESARTA, & Crickmay, week ending 03/11/2024.

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	13,1	3,6	12,8	9 600	2 240
Central Corridor	798	0,0	0,0	0,0	23 940	5 586
Dar Es Salaam Corridor	1 819	8,1	1,4	8,1	54 570	12 733
Maputo Corridor	1 571	3,6	0,4	3,4	47 130	10 997
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 649	8,4	1,4	8,3	109 470	25 543
Northern Corridor	2 817	1,4	0,1	1,4	92 520	21 588
Trans Caprivi Corridor	116	0,0	0,0	0,0	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	349	1,8	0,8	4,6	10 470	2 443
Trans Oranje Corridor	100	2,6	0,7	2,5	3 000	700
Sum/Average	11 766	4,0	0,7	4,1	360 990	84 231

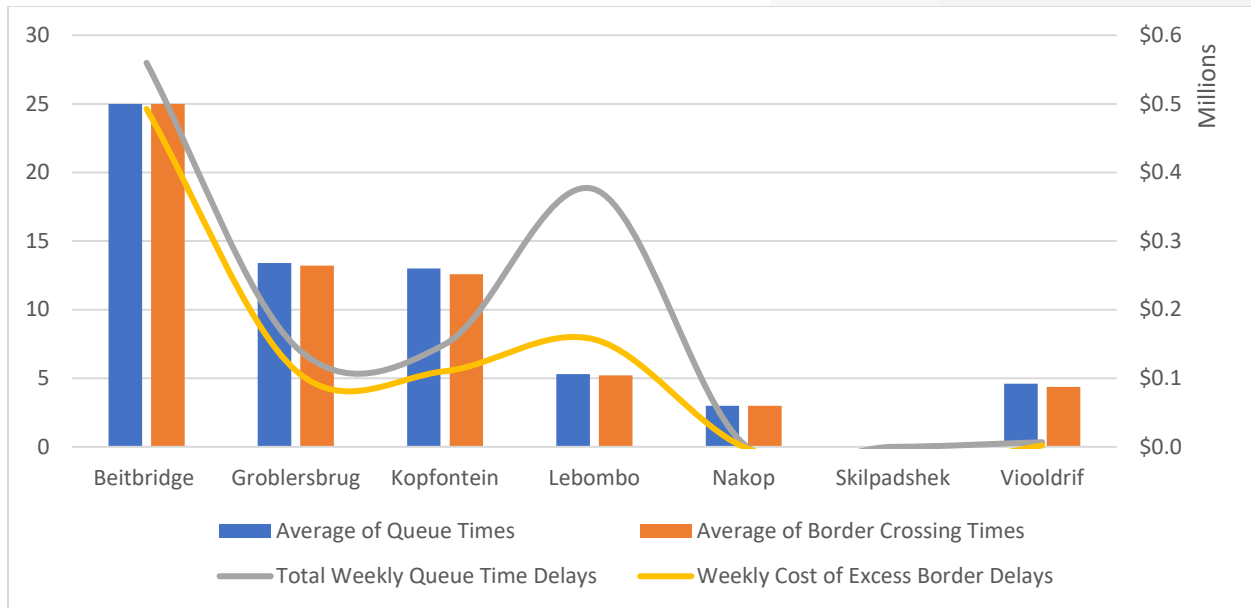
Source: TLC, FESARTA, & Crickmay, week ending 03/11/2024.

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

⁷ 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. 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.

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

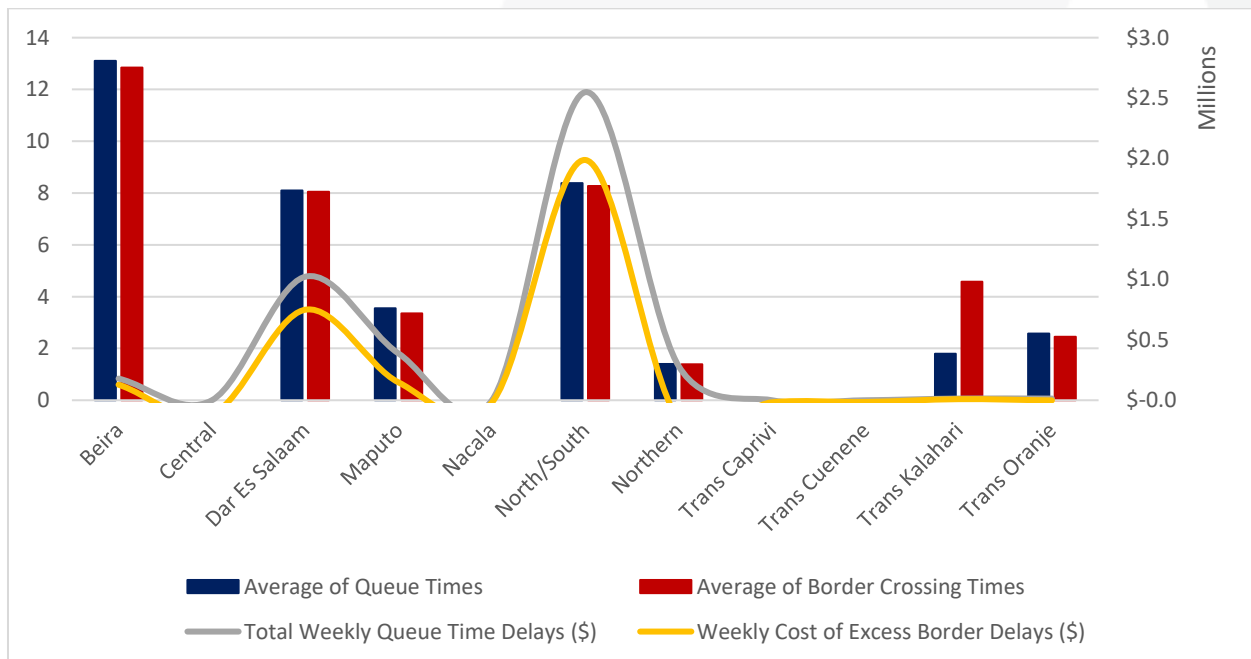
Figure 12 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 03/11/2024.

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 03/11/2024.

In summary, cross-border queue time averaged **~4,0 hours** (down by **~1,7 hours** from the previous week's **~4,0 hours**), indirectly costing the transport industry an estimated **\$4,4 million (R78 million)**. Furthermore, the week's average cross-border transit times hovered around **~4,1 hours** (down by **~1,4 hours** from the **~5,5 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$2,7 million (R47 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$7,1 million (R125 million)**, down by **~R79 million** or **↓39%** from **~R204 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. US elections and implications for global trade and logistics

A renewed Trump administration is expected to significantly disrupt global trade and logistics, reshaping policies and economic interactions for major economies and emerging markets. Trump's previous "America First" agenda, marked by aggressive tariff impositions, signals a return to protectionist policies that could reignite trade tensions, especially with the European Union. Considering potential trade disruptions, EU policymakers foresee a complex bilateral relationship, given unresolved issues over US green subsidies and steel and aluminium levies.⁹ The EU's stance suggests a proactive response, with Europe likely aiming to enhance its trade autonomy and mitigate dependency on the US. However, should Trump implement the proposed **10% to 20% tariffs** on all imports, the effects could strain this relationship further, risking a transatlantic trade war and a potential shift toward EU internal consolidation and alliances with other trade blocs.

In anticipation of potential tariffs, US importers are likely to accelerate shipments, a phenomenon termed the "pre-tariff rush." Based on data collected since 2018, the cargo front loading could raise US container imports by as much as **10% to 15%** in the next 3 months.¹⁰ This temporary import surge could overwhelm logistics networks, raising freight costs and increasing demand for warehousing and shipping space.¹¹ This short-term disruption may ease after the initial tariff impositions. Still, it will likely place significant pressure on the global logistics sector, which has already faced volatility due to recent supply chain disruptions.

Further tariffs on Asia, particularly China, could impact the region, with possible retaliatory measures targeting key US exports, such as agricultural and energy products. This back-and-forth could destabilise global trade flows, forcing companies to reassess their supply chains and explore alternative markets. For countries like South Korea and Japan, both significant trading partners of the US, adapting to fluctuating trade terms will be essential for mitigating potential losses.

For South Africa, a renewed US focus on protectionism intensifies the need to balance trade alliances carefully. As noted, the country's trade pattern has increasingly aligned with emerging economies like China, distancing itself from traditional partners, including the US. This shift has heightened risks by reducing flexibility to reroute trade amid geopolitical tensions. If the African Growth and Opportunity Act (AGOA) is not renewed, South Africa may face additional barriers to US markets, further complicating its trade landscape. Renewed AGOA would counter China's growing influence, safeguarding preferential access to US markets. However, South Africa's increasing geopolitical distance from the US underlines the challenges it faces in a world where globalisation is under threat.

A Trump re-election signals a shift towards fragmented global trade networks, encouraging nations to enhance regional partnerships and adopt resilient supply chain strategies.¹² This realignment presents challenges and opportunities for stakeholders worldwide, requiring agility in policy responses to navigate an era of heightened economic nationalism.

⁹ Qiu, H., Xia, D., & Yetman, J. 2024. [Deconstructing global trade: the role of geopolitical alignment](#). *BIS Quarterly Review*, 33-48.

¹⁰ Linerlytica. 11/10/2024. [Market Pulse 2024 Week 46](#).

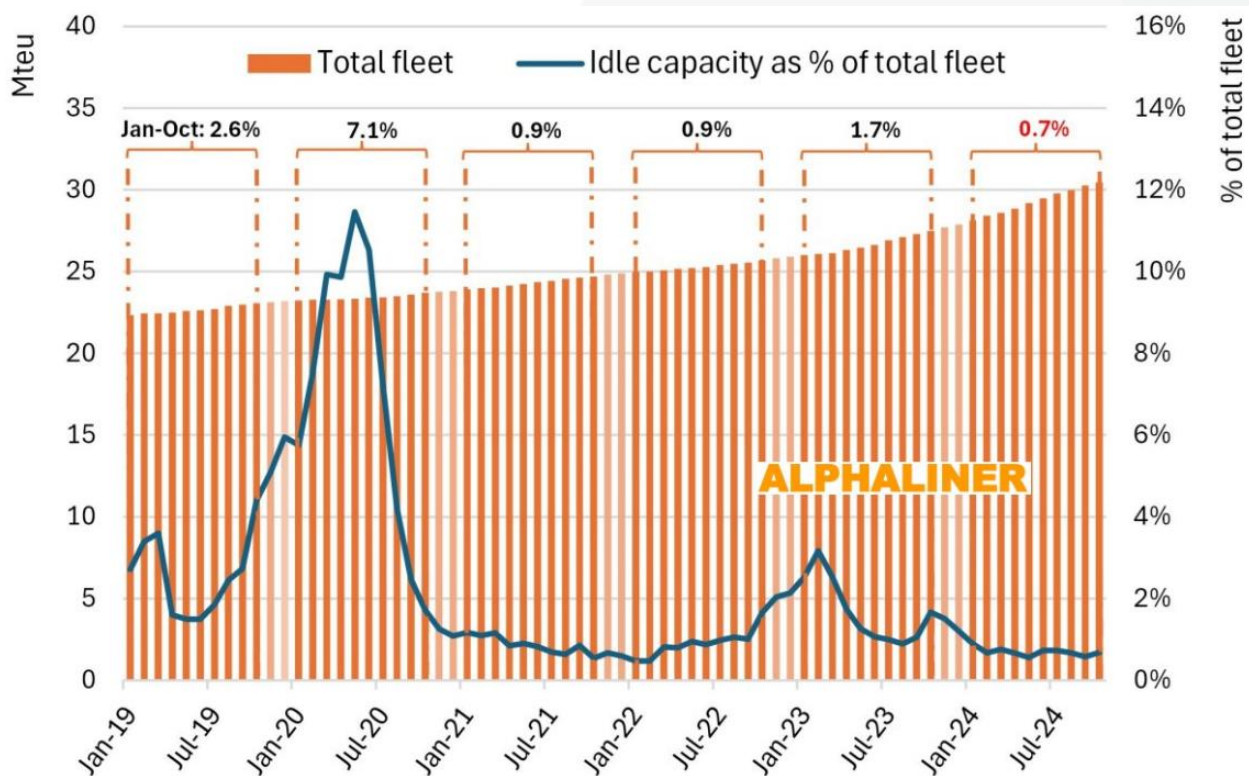
¹¹ Goldstone, C. 08/11/2024. [Trump tariff threat could see shippers launch new wave of import front-loading](#).

¹² Manners-Bell, J. 06/11/2024. [What will Trump's win mean for the logistics industry?](#)

ii. Global container summary and idle container fleet

The idle cellular container fleet hit a record low of **0,7%** from January to October due to the Red Sea crisis, which spiked demand and required all available ships for diversions (although CMA CGM is preparing to resume Suez Canal transits).¹³ In fact, Egypt claims Houthi attacks have cost its economy **\$6 billion** in lost Suez revenue.¹⁴ The diversions have further benefitted others, as China International Marine Containers (CIMC) saw a fivefold surge in container production in the first nine months of the year, driven by the Red Sea crisis, leading to a **36% revenue increase** and nearly doubled net profits. The resurgence in global container trade, forecasted to continue into 2025, has resulted in heightened demand for new containers to mitigate supply chain risks, with a notable shortage of 40ft containers amid prolonged transit times and port congestion.¹⁵ Nevertheless, the idle figure, lower than the **0,9%** idle rate during COVID in 2021-2022, highlights near-total fleet utilisation despite a **30% increase in fleet size** over four years, from **23,7 million TEU** in 2020 to **30,6 million TEU** in 2024. Effectively, **99,3%** of the fleet was either commercially employed or out of service for reasons like repair or conversion:

Figure 14 – Total cellular container fleet versus proportion of idle fleet



Source: [Alphaliner](https://www.alphaliner.com)

Elsewhere, port congestion remains high and hovers around the **2,4 million TEU** mark, accounting for **7,8% of the global fleet**.¹⁶ In South Africa, port congestion at the Port of Durban remains stable this week, as some capacity waiting to be off-loaded is currently outside at anchorage (some **22 900 TEU**). As such, the queue-to-berth ratio at Durban was **0,63**.¹⁷

¹³ Van Marle, G. 06/11/2024. [CMA CGM to resume Suez transits on India-US east coast service](https://www.alphaliner.com).

¹⁴ Bartlett, C. 04/11/2024. [Egypt claims Houthi attacks have cost its economy \\$6bn in lost Suez revenue](https://www.alphaliner.com).

¹⁵ Li, M. 04/11/2024. [Red Sea crisis provides a bonus for Chinese container manufacturers](https://www.alphaliner.com).

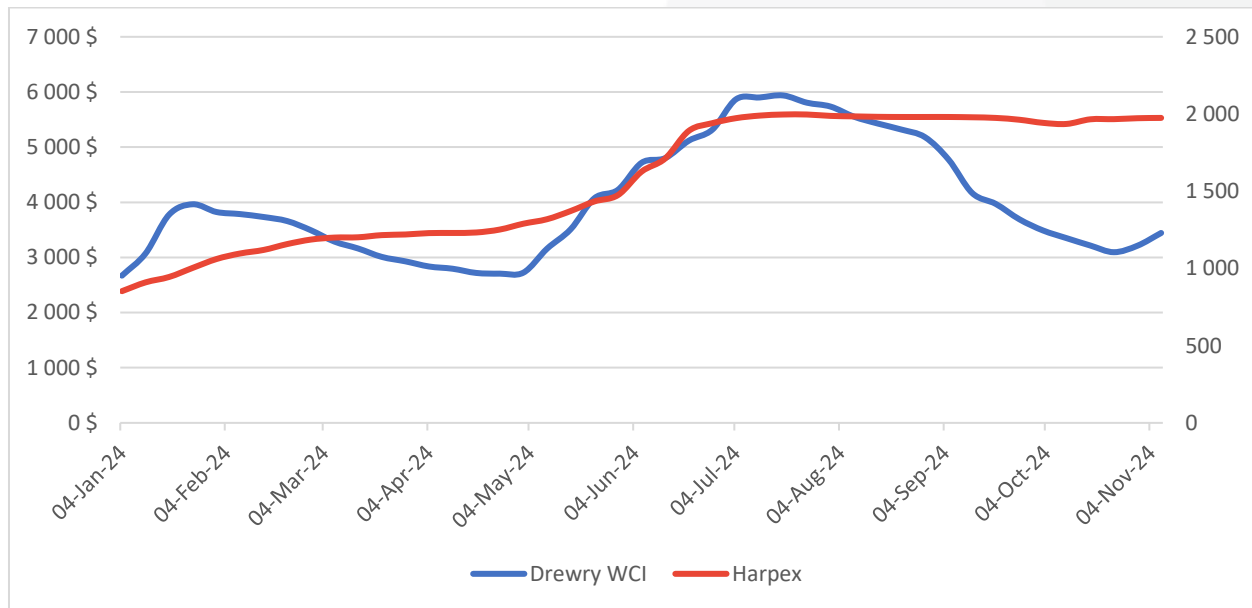
¹⁶ Linerlytica. 11/10/2024. [Market Pulse 2024 Week 46](https://www.linerlytica.com).

¹⁷ Linerlytica. 14/09/2024. [Port Congestion Watch](https://www.linerlytica.com).

iii. Global container freight rates and global container market summary

Led by significant increases out of China, as Shanghai – Rotterdam (↑16%) and Shanghai – Genoa (↑21%) shot through the roof, Drewry’s “World Container Index” increased again this week. The composite index is up by ↑7,2% (or \$231), trading at **\$3 444 per 40-ft container**.¹⁸ Charter rates remain stable, as the *Harper Petersen Index* (Harpex) traded around **1 975 points** (↑0,1%, w/w) on Friday. The following illustration shows the spot – and charter developments since January, with the volatility (and a significant spread between the two) evident:

Figure 15 – World Container Index and Charter rates (YTD, \$ per 40ft, index)



Source: Calculated from [Drewry](#) and [Harpex](#)

iv. Further developments of note

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

1. Port of Valencia slowly gets back to work after floods from rainstorms:

- a. Valencia Port has resumed limited cargo operations after severe rainstorms and flash flooding, the worst in five decades, devastated south-eastern Spain, leading to major infrastructure damage and restricted access.¹⁹
- b. Container lines, including Hapag-Lloyd, report significant operational challenges, with road and rail access hampered by closures and electricity outages affecting depots. This disruption aligns with an increased cargo buildup across major ports like Barcelona and globally, driven by Red Sea-related transshipment surges, impacting capacity at hub ports in Asia and Europe.

2. Ripples from standstill at strike-bound Canadian ports:

- a. Canadian ports face significant disruptions due to labour disputes, with dockworkers striking at Montreal's Termont terminals over stalled contract talks and a lockout of union supervisors at British Columbia's ports, including Vancouver and Prince Rupert.

¹⁸ Drewry. 31/10/2024. [World Container Index](#).

¹⁹ Mathais, A. 04/11/2024. [Port of Valencia slowly gets back to work after floods from rainstorms](#).

- b. These actions impact vital trade flows, prompting industry groups to call for federal mediation.²⁰ The Canadian government has expressed readiness to assist in negotiations to alleviate the economic strain.

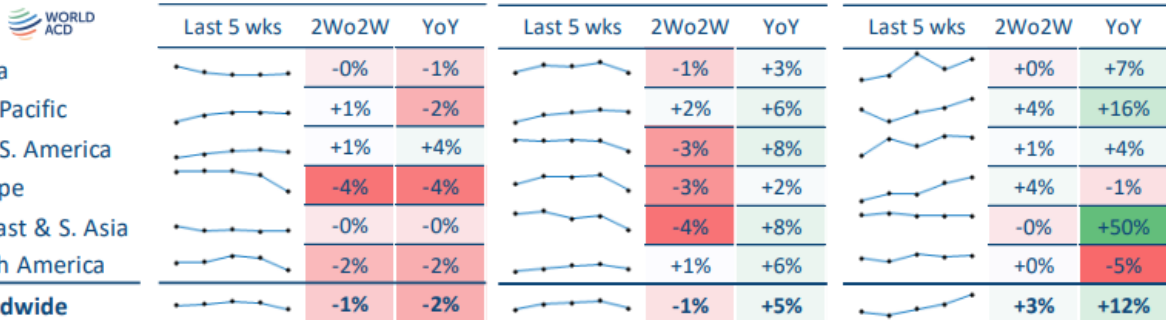
3. Typhoon Kong-ray creates congestion at Shanghai, Ningbo and Kaohsiung:

- a. Typhoon Kong-Rey has caused significant congestion at major Asian ports, with Kaohsiung experiencing 100% delays and substantial vessel waiting times at Shanghai and Ningbo.²¹
- b. Operations were temporarily halted, resulting in vessel backlogs and extended berthing delays due to severe weather. Despite recent freight rate hikes, ongoing weak demand and potential congestion-related capacity issues could pressure liner operators to lower rates again if utilisation does not recover.

b. Global air cargo industry

In week 44, global air cargo rates climbed by **↑2%** to **\$2,71 per kilogram**, reflecting price hikes from Asia-Pacific and Europe, which both rose by **↑2%** (w/w), reaching **\$3,56/kg** and **\$2,13/kg**, respectively. Rates from Africa increased by **↑3%** to **\$1,98/kg**. Spot rates were notably up by **↑3%**, with strong growth from Europe (**↑3%**) at **\$2,34/kg** and Asia-Pacific (**↑1%**) at **\$4,24/kg**. These gains contributed to a year-on-year rate increase of **↑12%**. The following matrix illustrates the changes in the previous five weeks:

Figure 16 – Capacity, weight, and rates by region (last 2 to 5 weeks, y/y % change)

Origin Regions last 2 to 5 weeks	Capacity ¹			Chargeable weight ¹			Rate ¹		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
									
Africa		-0%	-1%		-1%	+3%		+0%	+7%
Asia Pacific		+1%	-2%		+2%	+6%		+4%	+16%
C. & S. America		+1%	+4%		-3%	+8%		+1%	+4%
Europe		-4%	-4%		-3%	+2%		+4%	-1%
M. East & S. Asia		-0%	-0%		-4%	+8%		-0%	+50%
North America		-2%	-2%		+1%	+6%		+0%	-5%
Worldwide		-1%	-2%		-1%	+5%		+3%	+12%

Source: [World ACD](#)

Despite these upward rate trends, global cargo volume and capacity each declined by **↓1%** (w/w), likely due to national holidays on 1-2 November. However, annual data indicates a **↑5%** tonnage increase, supported by a capacity rise in major regions like Asia-Pacific and North America. The overall outlook reflects a resilient market driven by regional demand surges and modest capacity constraints.

Ultimately, The growth of cross-border e-commerce has sustained high air cargo demand, especially out of China, resulting in increased capacity and elevated rates comparable to pandemic levels.²² This trend has introduced trade imbalances, with heavy outbound Asian loads but lower inbound volumes, impacting costs and capacity allocation. While traditional sectors like fashion and luxury goods are shifting towards ocean freight for cost efficiency, e-commerce continues to drive air cargo demand, partially aided by rerouted container vessels around the Cape of Good Hope, contributing to increased air shipments.

²⁰ Goldstone, C. 05/11/2024. [Ripples from standstill at strike-bound Canadian ports could spread inland.](#)

²¹ Li, M. 05/11/2024. [Typhoon Kong-ray creates congestion at Shanghai, Ningbo and Kaohsiung.](#)

²² Todd, S. 07/11/2024. [Cross-border e-commerce continues to dominate air cargo markets.](#)

ENDS²³

²³**ACKNOWLEDGEMENT:**

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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.
- 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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