

Cargo Movement Update #215¹

Date: 8 December 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)	41 609	47 405	89 014	32 887	37 467	70 354	↑27%
Air Cargo (tons)	4 233	3 097	7 330*	4 201	3 219	7 421	↓1%

Monthly Snapshot

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

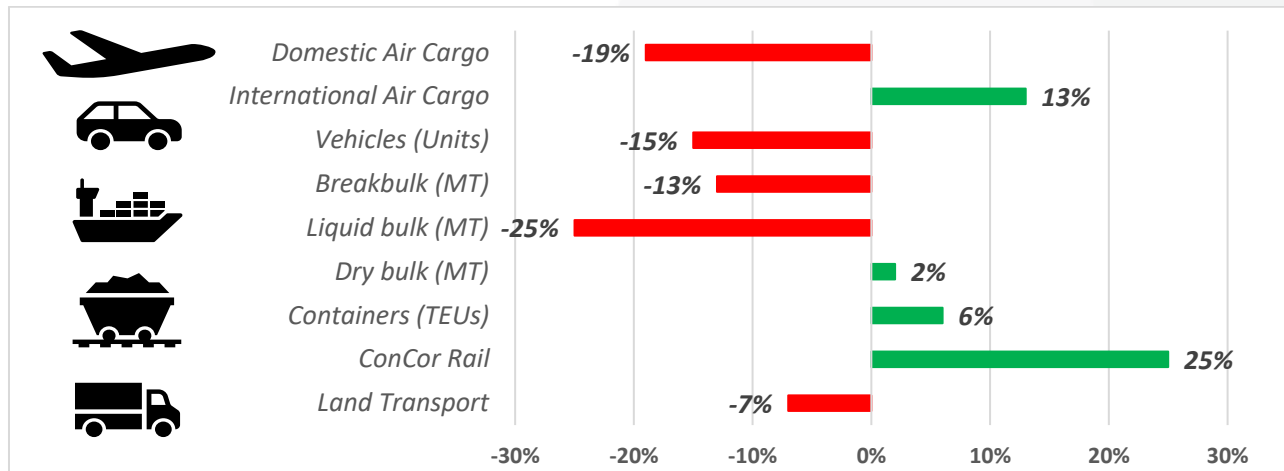
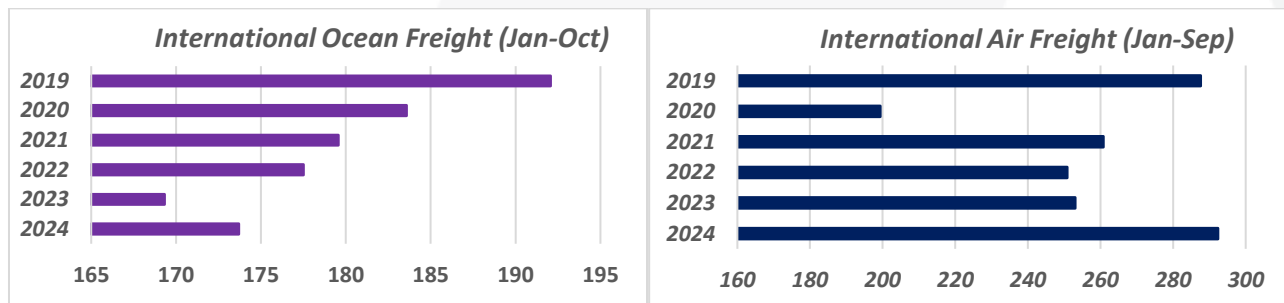


Figure 2 – Year-to-date flows 2019-2024⁶: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~12 716 TEUs** was handled per day, with **~10 720 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 629** containers, up **↑40%** from last week.
- Cross-border queue: **↓0,3 hrs**; transit: **↓0,1 hrs**; SA borders: **18,6 hrs (↑24%)**; SADC: **4,5 hrs (↓10%)**.
- Global port congestion has remained stable in recent weeks, accounting for **7% of the global fleet**.
- Global container rates increased by **↑6,1%** (or **\$202**), trading at **\$3 533/40-ft container**.
- IATA reports record-high air cargo volumes in October, with YTD demand up **↑12,2%** from 2023.

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 215th update.

² 'Current' means the last seven days (a week's) of available data. *Air freight for this week is projected.

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: Oct vs Oct.

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 **12 716 TEUs** was handled per day, up from **10 051 TEUs** last week. Port operations were characterised by inclement weather, vacant berths, equipment breakdowns and shortages. The main operational delays in Cape Town stemmed from adverse weather and a vacant berth at the start of the week. In contrast, inclement weather and equipment breakdowns ensured operational delays in Durban. Strong winds and vacant berths were the main sources of operational delays at our Eastern Cape Ports, while terminal challenges led to operational constraints in Richards Bay this week. The latest reports suggest that the assembly of the new straddle carriers for Durban is in progress, with endurance tests scheduled for the second week of January 2025. Additionally, the floating crane returned to operations this week as anticipated; however, the port helicopter was in service sporadically this week. Lastly, the latest reports suggest that the line near Pretoria is still severely affected by cable theft, causing operational delays of anything between 12 and 18 hours.

Port congestion has stabilised globally at **2,5 million TEU**; however, despite the high throughput achieved this week, congestion at Durban port has slightly increased, with **35 000 TEU** at anchorage. Freight rates fluctuated again this week, as charter rates remained steady at **2 043 points**. Alphaliner reported the Mediterranean Sea will become an Emission Control Area (ECA) from May 2025, requiring reduced sulphur content in marine fuels. The Red Sea crisis has continued to disrupt global shipping routes – particularly on the Asia-Europe routes, leading to longer sailing distances and a need for more vessels, especially 12 000 to 17 000 TEU ships. Deployment trends have shifted, with larger vessels increasingly used across trade lanes, though impacts remain less extreme than during COVID-19 market disruptions.

In the local aviation industry, Airports Company South Africa (ACSA) is reportedly facing severe financial distress. There are allegations of falsified financial reports and deteriorating airport infrastructure, including non-functional escalators, unclean facilities, and faulty parking systems.⁷ These issues have prompted service providers to organise a media tour to highlight the declining state of the country's airports. Also at ORTIA, airlines experienced flight delays on Monday due to a malfunctioning valve in the fuel system, which hindered aircraft refuelling operations. Technicians have since resolved the issue, and refuelling activities have returned to normal.⁸ In the international air cargo, IATA reports October as the 15th consecutive month of growth, as global cargo tonne-kilometres (CTK) grew by **↑9,4%** (y/y), with cargo demand increasing by **↑5,7%** after seasonal adjustments.

In the regional cross-border road freight trade, the average queue times decreased by around **20 minutes** from last week, as the transit times remained roughly the same. The median border crossing times at South African borders increased by about **three and a half hours**, averaging **~18,6 hrs (↑24%, w/w)** for the week. In contrast, the greater SADC region (excluding South African controlled) decreased slightly – averaging **~4,5 hrs (↓10%, w/w)**. On average, five SADC border posts took more than a day to cross – Beitbridge, Groblersbrug, Kasumbalesa (the worst affected, taking **almost two days** to cross from both sides), Katima/Mulilo, and Skilpadshek. Other developments included **(1)** increased queue and crossing times for

⁷ Sithole, S. 09/12/2024. [Airports Company SA on the brink of liquidation.](#)

⁸ Business Tech. 09/12/2024. [Flight delays as fuel problems hit OR Tambo.](#)

South African borders, **(2)** Beitbridge security issues, **(3)** continued protests in Mozambique, **(4)** poor road conditions to Chirundu, **(5)** OSBP developments in DRC, and **(6)** minor BURS system connectivity issues.

In closing the last edition of 2024, the record-high container volumes handled through our ports bodes well for a strong finish to the year, as the overwhelming theme in our logistics network this year has been one of a growth story to build on last year's story of arresting the decline. To be sure, the growth has been built on a terribly low base – but it is an important reality nonetheless. For 2025, we must improve efficiency and productivity (in both ports and rail) and accelerate logistics reform. These facts are necessary for South Africa to return to its rightful place as a meaningful trading partner and logistics hub serving as the gateway to Africa. As we have reiterated often, these developments require collaboration between all important stakeholders – public, private, and labour. Without a cohesive approach from all stakeholders, South Africa will continue to lag behind and lose unnecessary volume, capacity, and connectivity to its regional peers. Let's all pull our collective weight to ensure that the trade, transport, and logistics industry ends 2024 well and builds on the minor success to improve throughput in 2025.

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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, 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 2 to 8 December (measured in TEUs)

7-day flow reported (02/12/2024 – 08/12/2024)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 899	34 292	↑31%
New Pier (Pier 1)	2 551	17 854	↑25%
Cape Town Container Terminal	2 320	16 237	↑91%
Ngqura Container Terminal	1 958	13 703	↑34%
Port Elizabeth Container Terminal	281	1 964	↓1%
Other	709	4 964	↓46%
Total	12 716	89 014	↑27%

Source: Calculated from TPT, 2024. Updated 08/12/2024.

A record year-high average of ~**12 716 TEUs (↑27%)** was handled per day for the last week (2 to 8 December, Table 2), compared to the projected average of ~**10 702 TEUs (↑19% actual versus projected)** noted in last week's report.

For the coming week, a decreased average of ~**10 720 TEUs (↓16%)** is predicted to be handled (9 to 15 December, Table 3). Despite the elevated volumes, port operations were still slightly constrained by inclement weather, vacant berths, equipment breakdowns, and shortages.

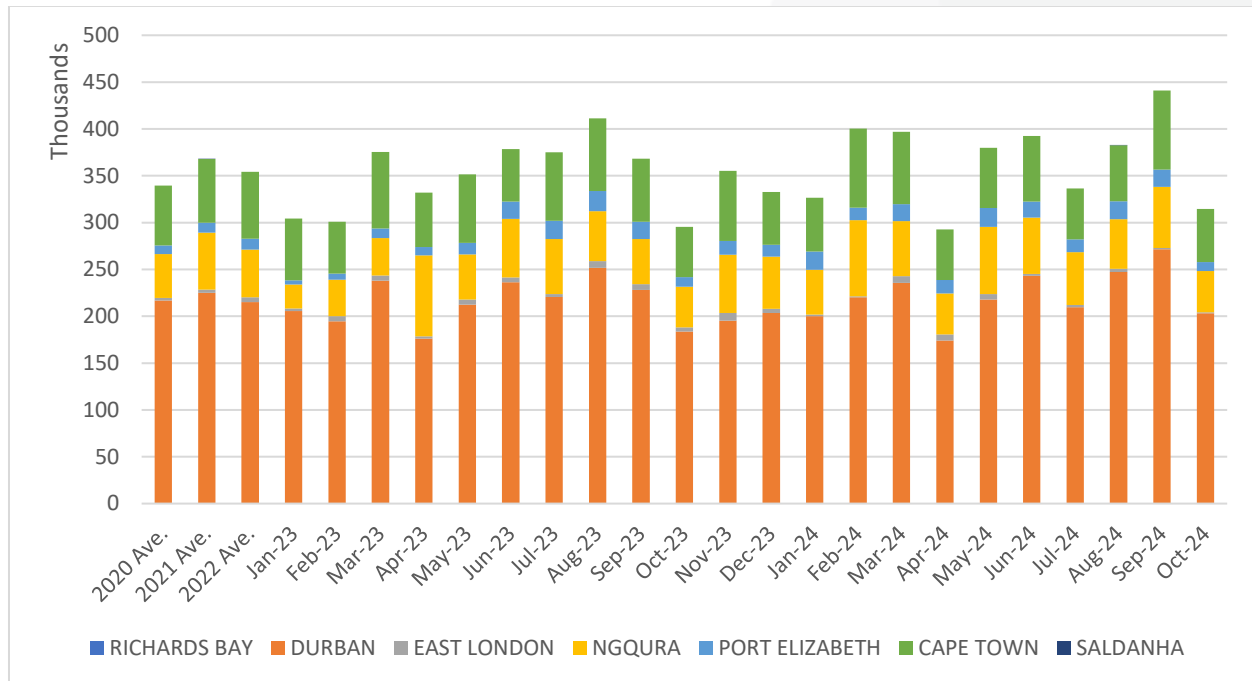
Table 3 – Container Ports – Weekly flow projected for 9 to 15 December (measured in TEUs)

7-day flow reported (09/12/2024 – 15/12/2024)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 307	30 146	↓12%
New Pier (Pier 1)	1 579	11 052	↓38%
Cape Town Container Terminal	2 128	14 895	↓8%
Ngqura Container Terminal	1 780	12 459	↓9%
Port Elizabeth Container Terminal	215	1 504	↓23%
Other	712	4 985	↓24%
Total	10 720	75 040	↓16%

Source: Calculated from TPT, 2024. Updated 08/12/2024.

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

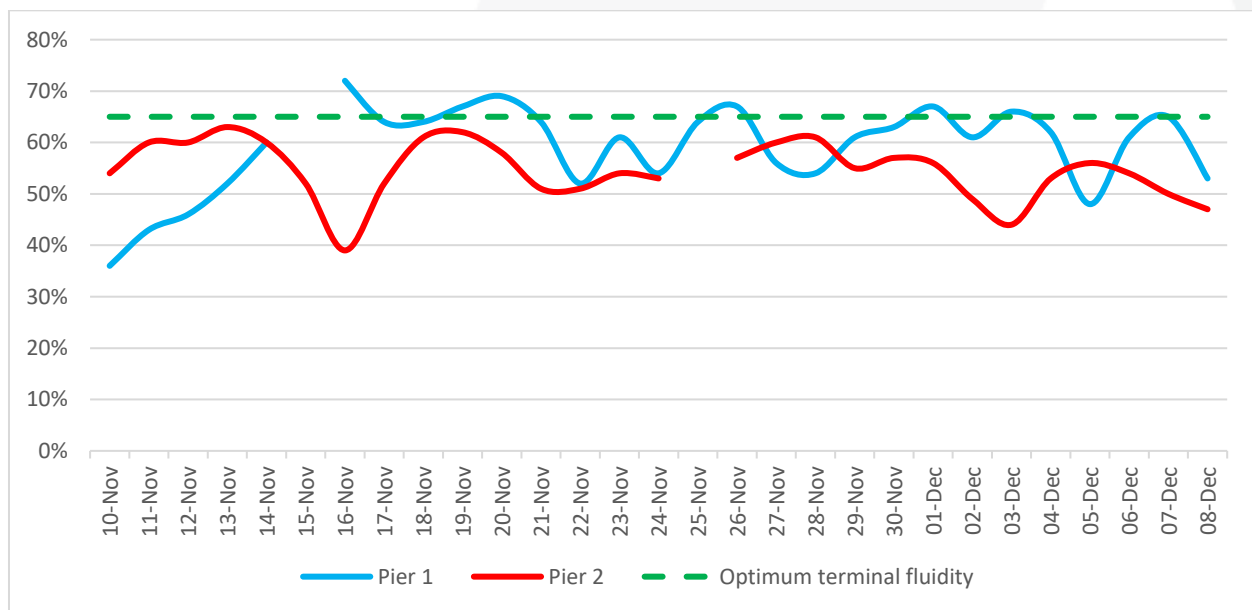
Figure 3 – Monthly flow reported for total container movement (TEUs 2020 to present, m/m)



Source: Calculated using data from TNPA, 2024, and updated 08/12/2024.

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

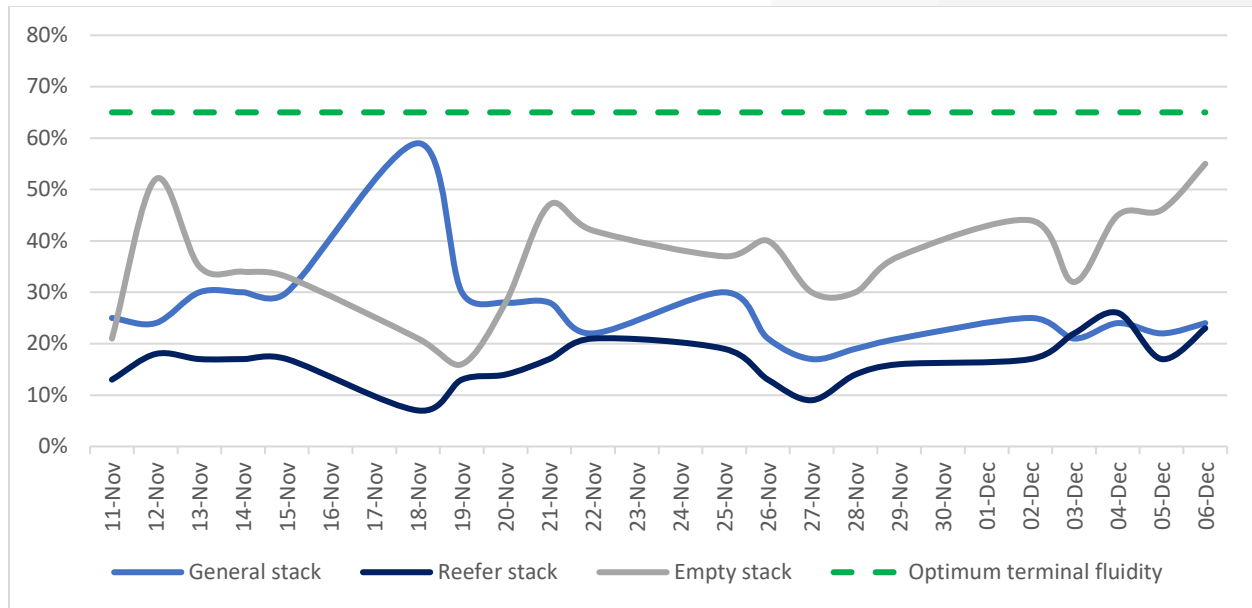
Figure 4 – Stack occupancy in DCT, general-purpose containers (10 November to present; a day on the day)



Source: Calculated using data from Transnet, 2024, and updated 08/12/2024.

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 (11 November to present, day on day)



Source: Calculated using data from Transnet, 2024, and updated 08/12/2024.

b. Summary of port operations

i. Weather and other delays

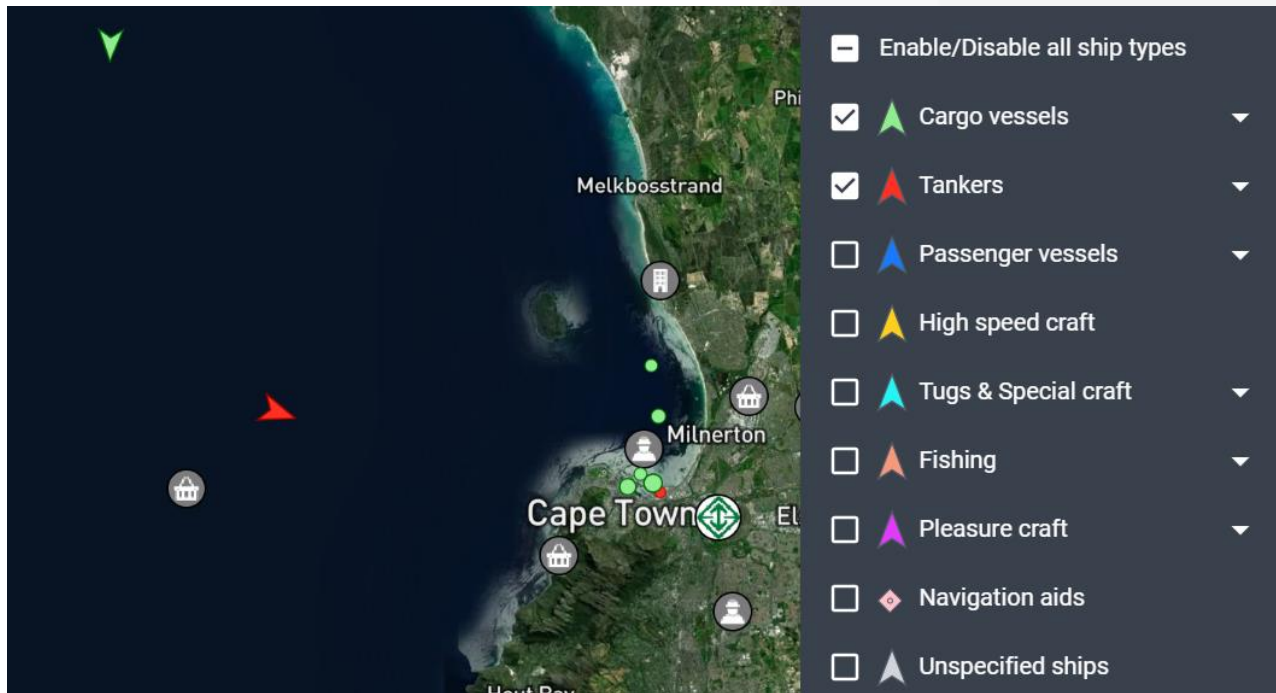
- The main operational delays in Cape Town stemmed from adverse weather and a vacant berth at the start of the week.
- Inclement weather and equipment breakdowns ensured operational delays in Durban.
- Strong winds and vacant berths were the main source of operational delays at our Eastern Cape Ports.
- Terminal challenges led to operational constraints in Richards Bay this week

ii. Cape Town

On Friday, CTCT recorded three vessels at berth and two at anchor as strong winds and a vacant berth disrupted operations earlier this week. Between Monday and Friday, on the landside, the terminal managed to service 4 397 trucks while handling approximately 203 rail units. On the waterside, the terminal executed approximately 7 319 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 24%, reefers at 23%, and empties at 55%**. Additionally, the terminal operated with **seven STS cranes, 28 RTGs, and 65 hauliers** towards the end of the week. Cranes LC6 and LC8 were out of commission for most of the week. No ETR has been communicated for either machine yet.

On Friday, CTMPT recorded one vessel at berth but zero vessels at anchor. In the preceding 24 hours, the terminal handled around 271 TEUs across the quay. On the landside, 32 trucks were processed during the same period. Towards the end of the week, stack occupancy was recorded at 16% for general cargo, 18% for reefers, and 8% for empties. The latest reports suggest that all three cranes, accompanied by four straddle carriers, were operational towards the end of the week.

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



Source: Marine Traffic. Updated 08/12/2024 at 14:00.

iii. Durban

On Friday, Pier 1 recorded two vessels on berth, operated by five gangs, with another four at anchor. Stack occupancy was **61%** for **GP containers**. Between Monday and Friday, the terminal executed approximately 6 225 gate moves and 364 rail moves on the landside. The **average TTT** for the week was **~79 minutes (↓4%, w/w)** and an average **staging time** of **~51 minutes (↓22%)**. Additionally, the terminal moved approximately 7 782 TEUs across the quay on the waterside during the same period. The terminal operated with **five STS cranes** for most of the week and had **14 RTGs** in service towards the end of the week.

Pier 2 had four vessels on berth and another five at anchorage on Friday, as adverse weather and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **49%** for **GP containers**. The terminal operated with **11 gangs** and moved approximately 15 304 containers across the quay between Monday and Friday on the waterside. During the same period, there were approximately 10 472 gate moves on the landside, with an **average TTT** of **~108 minutes (↓4%, w/w)** and a staging time of **~140 minutes (↓22%)** for the week. Approximately 1 799 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **40** and **46** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **49%** during this period.

The latest reports suggest that the assembly of the new straddle carriers are in progress, with endurance tests scheduled for the second week of January 2025. Additionally, towards the end of the week, the most notable crane absentees were cranes 520, 522, 523, 532, and 533. No ETR was available for the return of crane 520 yet, while the ETR for crane 522 was revised to 13 December. Crane 523 was expected back in service before the weekend, while no ETR was communicated for cranes 532 and 533.

As anticipated, the floating crane returned to operations this week; however, the port helicopter was in service sporadically this week. Towards the end of the week, the aircraft returned to service but went out of commission shortly after due to additional breakdowns experienced.

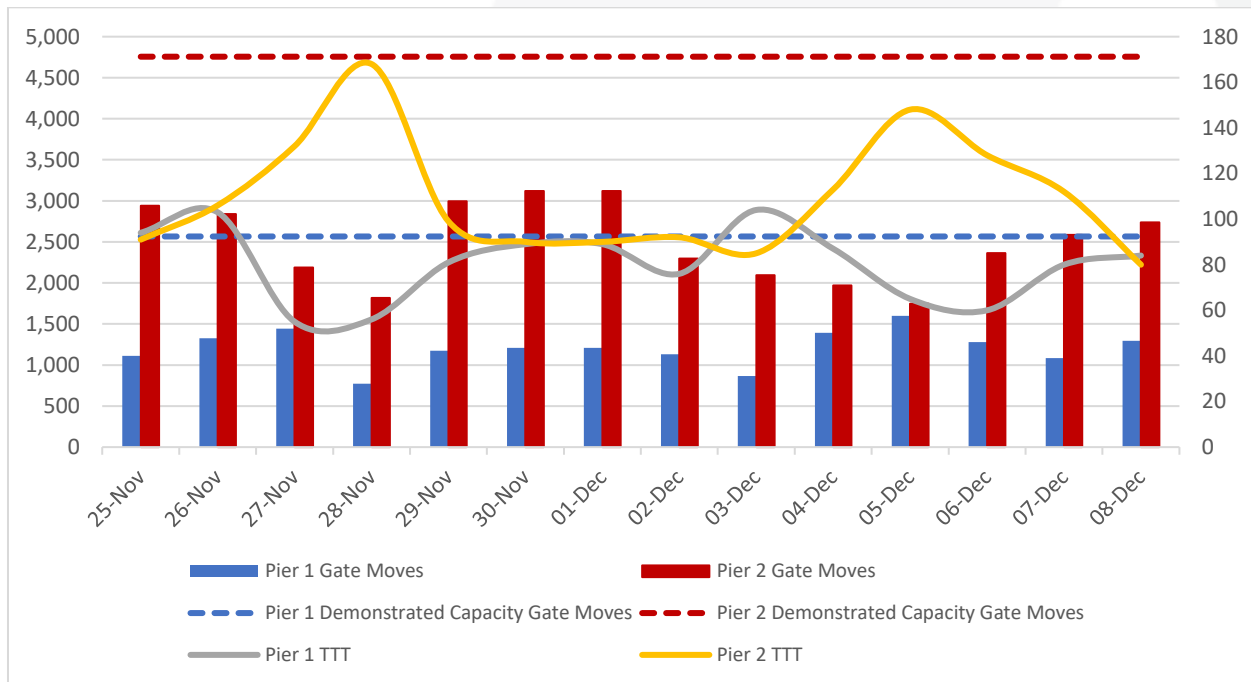
Durban's MPT terminal recorded three vessels at berth on Friday and two at the outer anchorage. Stack occupancy for containers was 43%, with the breakbulk stack around 85%. In the preceding 24 hours, the terminal handled 350 containers and 4 183 tons of breakbulk on the waterside. On the landside, 364 container trucks and 75 breakbulk RMTs were serviced. During this period, two cranes, six reach stackers, seven forklifts, and 16 ERFs were in operation. The latest reports suggested that the third mobile harbour crane was anticipated to return to operations before the weekend. In contrast, the return of the fourth crane was revised to September 2025 due to the structural repairs required.

On Wednesday, the Maydon Wharf MPT recorded zero vessels at berth or anchor. On the waterside, 2 825 tons of Chrome Ore were handled across the quay. On the landside, 87 trucks containing around 2 373 tons were handled on the waterside in the 24 hours before. On Friday, the agri-bulk facility recorded one berthed vessel, with no vessels waiting at anchor. On the waterside, 8 934 tons were handled across the quay, with no trucks being processed on the landside.

On Thursday, the Ro-Ro terminal in Durban recorded zero vessels on the berth, with zero vessels at anchorage. In the 24 hours before, the terminal handled 1 740 road and 225 rail units on the landside while handling 1 671 units on the waterside. Overall stack occupancy was 54% (Exports: 39%, Imports: 44%, Transshipments: 17%), 30% at Q&R, and 80% at G-berth. During this period, the terminal had 133 high-and heavies (abnormal loads) on hand and managed to handle 59.

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.

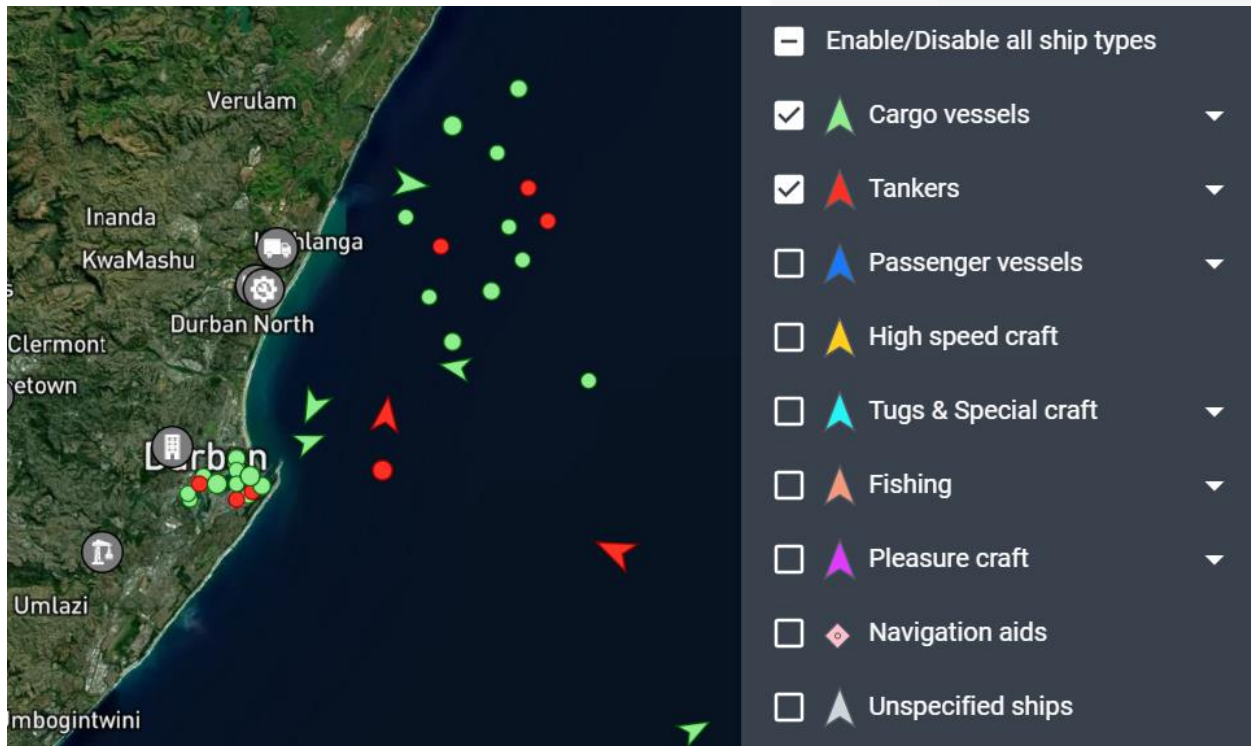
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 08/12/2024.

The queue of container vessels waiting outside Durban has slightly increased in the last few weeks. On Sunday evening, **four** vessels were waiting for Pier 1, **three** for Pier 2, and **one** for Point terminal, with a current estimation of **at least five additional days added to the schedules** (stable from last week).

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 08/12/2024 at 14:00.

iv. Richards Bay

On Friday, Richards Bay had 19 vessels at anchor and 12 on the berth, translating to three 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. However, in the early stages of the week, the pilot boat was out of commission due to a shortage of human resources on the craft. Last week Monday, the coal terminal had two vessels at berth and one at anchor, handling **105 185 tons** on the waterside. The daily average for the week increased to around **153 900 tons (↑29%, w/w)**. An average of 27 trains were serviced on the landside, above the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded one vessel on berth but zero at anchor, with none 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 8% for reefers, 27% for reefer ground slots, and 20% for the general stack. During this period, the terminal conceded around five-and-a-half operational hours to adverse weather but managed to handle 1 128 TEUs on the waterside. Approximately 419 trucks were processed on the landside at a TTT of ~25 minutes. Towards the end of the week, the terminal had seven STS cranes, 25 RTGs, and 44 hauliers in service.

On Friday, GCT had one vessel at berth and none at outer anchorage. Marine resources of one tug, a pilot boat, two pilots, and one berthing gang were in operation in the preceding 24 hours. Despite conceding around five hours to adverse weather, 35 trucks were processed at a TTT of ~13 minutes on the landside, while 331 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 29% for the general stack and 9% for reefers. Additionally, towards the end of the week, the terminal had one STS crane, one mobile harbour crane, and ten straddles available.

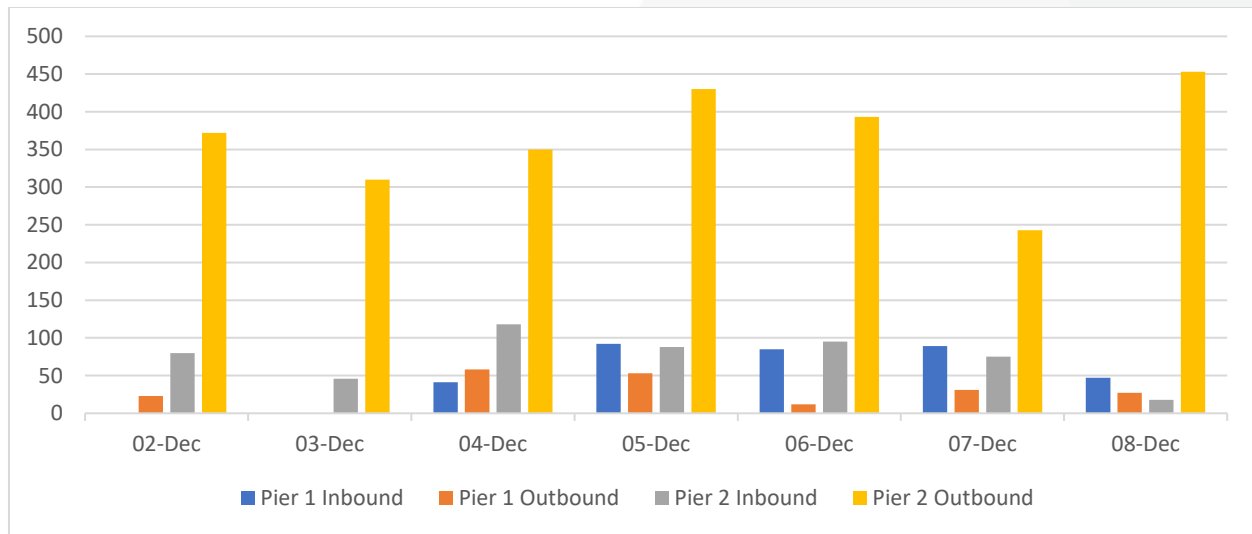
vi. Saldanha Bay

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

vii. Transnet Freight Rail (TFR)

The latest reports suggest that cable theft still badly affects the line near Pretoria, causing operational delays of 12 to 18 hours. Additionally, towards the end of the week, DCT Pier 2 had 43 ConCor units on hand with a dwell time of 72 hours and 142 over-border units with a dwell time of 25 days. Rail containers on hand in Durban were reported as follows: Point: 38, Pier 1: 141, Pier 2: 232.

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



Source: Calculated using data from Transnet, 2024. Updated 08/12/2024.

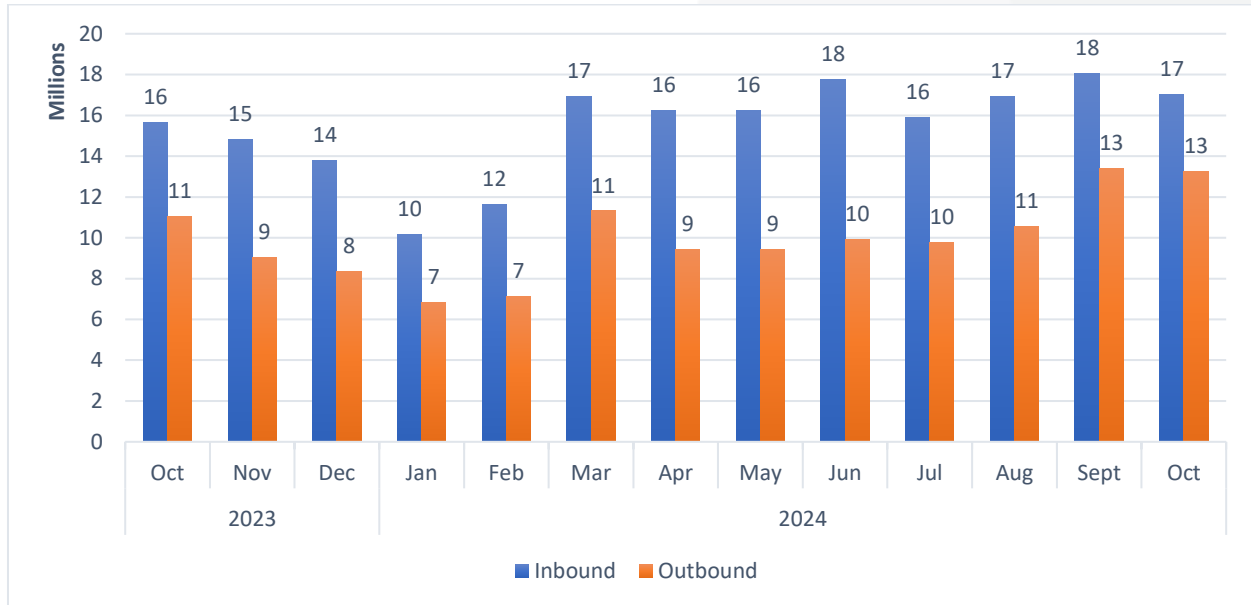
In the last week (2 to 8 December), rail cargo handled out of Durban was reported at **3 629** containers, up by a significant **↑40%** from the previous week's **3 489** containers.

2. Air Update

a. International air cargo

The following figure shows the inbound and outbound air cargo flows to and from ORTIA since the start of 2023, with the increased outbound cargo evident:

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

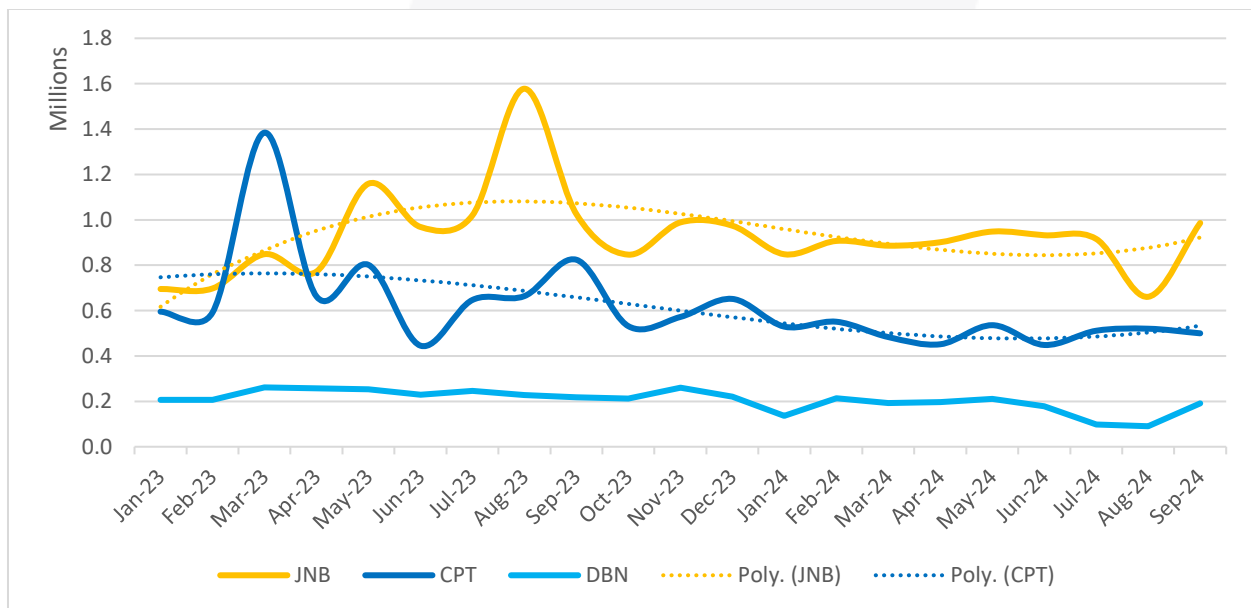


Courtesy of ACOC. Updated: 25/11/2024.

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 increased by about **three and a half hours**, averaging **~18,6 hrs (↑24%, w/w)** for the week.
- In contrast, the greater SADC region (excluding South African controlled) decreased slightly – averaging **~4,5 hrs (↓10%, w/w)**.
- **Border queues and crossing times:**
 - Increased crossing times at Skilpadshok (5,5 km queue, 221 vehicles), Kopfontein (8 km queue, 315 vehicles), Groblersbrug (2,8 km queue, 111 vehicles), and Ramatlabama (7 km queue, 285 vehicles) noticed at various times during the week.
- **Beitbridge security and fees:**
 - Southbound vehicles at Beitbridge facing criminal activity (flat deck covers, ropes, tarpaulins cut). Zimbabwe Republic Police (ZRP) will be stationed in future.
 - Transporters are required to pay Zimborders fees for 15 years. Potential for the Kazungula route to gain popularity due to Beitbridge's decline, necessitating upgrades at Groblersbrug, Kopfontein, and Ramatlabama.
- **Mozambique protests:**
 - Daily protests disrupt transport, halting border movements from 08:00 to 16:00.
 - On Friday, the road from KM4 to Pessene was open, and there were ongoing patrols. Malhampene in N4 to the port was blocked. Transporters are urged to monitor the developments continually.
- **Chirundu road conditions:**
 - The northbound road to Chirundu severely deteriorated, with more dirt than tar visible.
- **DRC developments:**
 - Phase 2 of Mahagi One-Stop Border Post construction is completed; Phase 3 is to commence shortly.
 - Truck drivers near Likasi Bypass were extorted parking fees by the military and police (\$10), with most refusing to pay. FESARTA is engaging the local governor to resolve this.
- **BURS system connectivity:**
 - System instability since yesterday morning; technicians are working on resolution without a timeframe provided.

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

Table 4 – Delays⁹ summary – South African borders (both directions)

Border Post	Direction	HGV ¹⁰ 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	477	40,8	10,3	41,0	14 310	3 339
Beitbridge	Zimbabwe-SA	449	11,3	2,2	11,2	13 470	3 143
Groblersbrug	SA-Botswana	248	25,6	1,1	26,0	7 440	1 736
Martins Drift	Botswana-SA	208	2,6	0,4	2,4	6 240	1 456
Kopfontein	SA-Botswana	238	18,3	5,1	18,0	7 140	1 666
Tlokweng	Botswana-SA	44	0,7	0,2	0,4	1 320	308
Vioolsdrift	SA-Namibia	30	4,6	1,0	4,4	900	210
Noordoewer	Namibia-SA	20	2,0	0,4	1,6	600	140
Nakop	SA-Namibia	30	5,2	1,1	5,1	900	210
Ariamsvlei	Namibia-SA	20	1,3	0,4	1,2	600	140
Skilpadshek	SA-Botswana	246	26,5	5,5	27,0	7 380	1 722
Pioneer Gate	Botswana-SA	86	1,7	1,1	1,4	2 580	602
Lebombo	SA-Mozambique	1 446	8,9	2,1	8,6	43 380	10 122
Ressano Garcia	Mozambique-SA	125	2,2	0,4	2,1	3 750	875
Sum/Average		3 667	10,8	2,2	10,7	110 010	25 669

Source: TLC, FESARTA, & Crickmay, week ending 01/12/2024.

Table 5 – 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	10,0	3,7	9,8	9 600	2 240
Central Corridor	798	0,5	0,1	0,4	23 940	5 586
Dar Es Salaam Corridor	1 819	10,3	1,0	10,0	54 570	12 733
Maputo Corridor	1 571	5,6	1,2	5,4	47 130	10 997
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 736	11,1	1,7	11,3	112 080	26 152
Northern Corridor	2 817	1,2	0,1	1,1	92 520	21 588
Trans Caprivi Corridor	116	24,1	3,5	24,0	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	362	7,9	1,9	7,8	10 860	2 534
Trans Oranje Corridor	100	3,3	0,7	3,1	3 000	700
Sum/Average	11 866	6,0	1,0	6,0	363 990	84 931

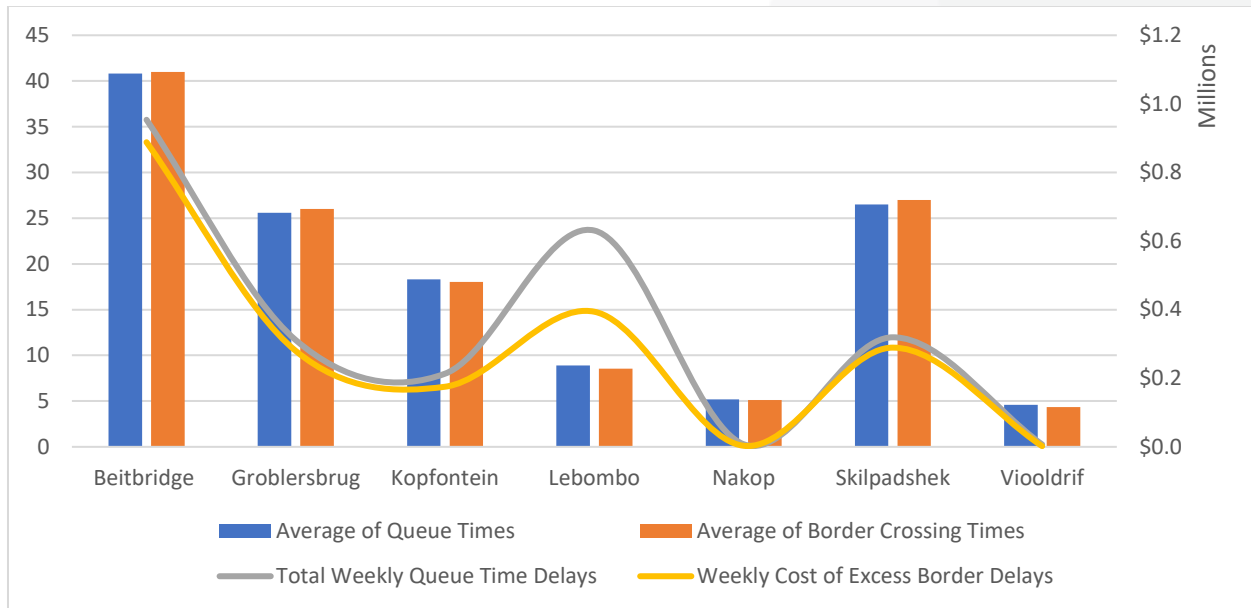
Source: TLC, FESARTA, & Crickmay, week ending 01/12/2024.

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

⁹ Reported delays are uncertain and variable, stemming from multiple distributed causes. They cannot be solely attributed to a single issue due to limited transparency in the border process. Common factors include poor infrastructure, congestion, and lack of coordination among stakeholders. Data is sourced from the Logistics Monitoring System (LMS) by Crickmay and SAAFF. Stakeholders are encouraged to report issues via the UNCTAD/AfCFTA NTB platform or contact FESARTA's TRANSIST Bureau for more reliable information.

¹⁰ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

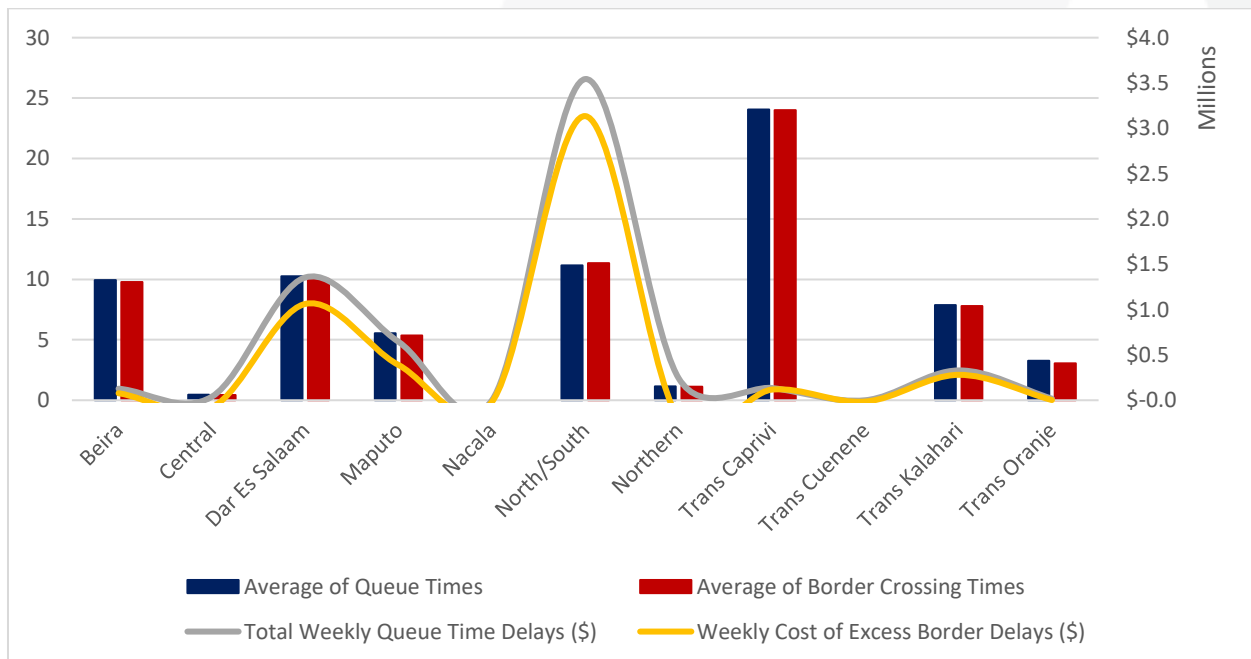
Figure 12 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 01/12/2024.

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 01/12/2024.

In summary, cross-border queue time averaged **~6,0 hours** (down by **~0,3 hours** from the previous week's **~6,3 hours**), indirectly costing the transport industry an estimated **\$6,4 million (R115 million)**. Furthermore, the week's average cross-border transit times hovered around **~6,0 hours (largely unchanged)** from the **~6,0 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$4,7 million (R85 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$11,2 million (R200 million)**, up by **~R3 million** or **↑1,2%** from **~R197 million** in the previous report).

4. International Update

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

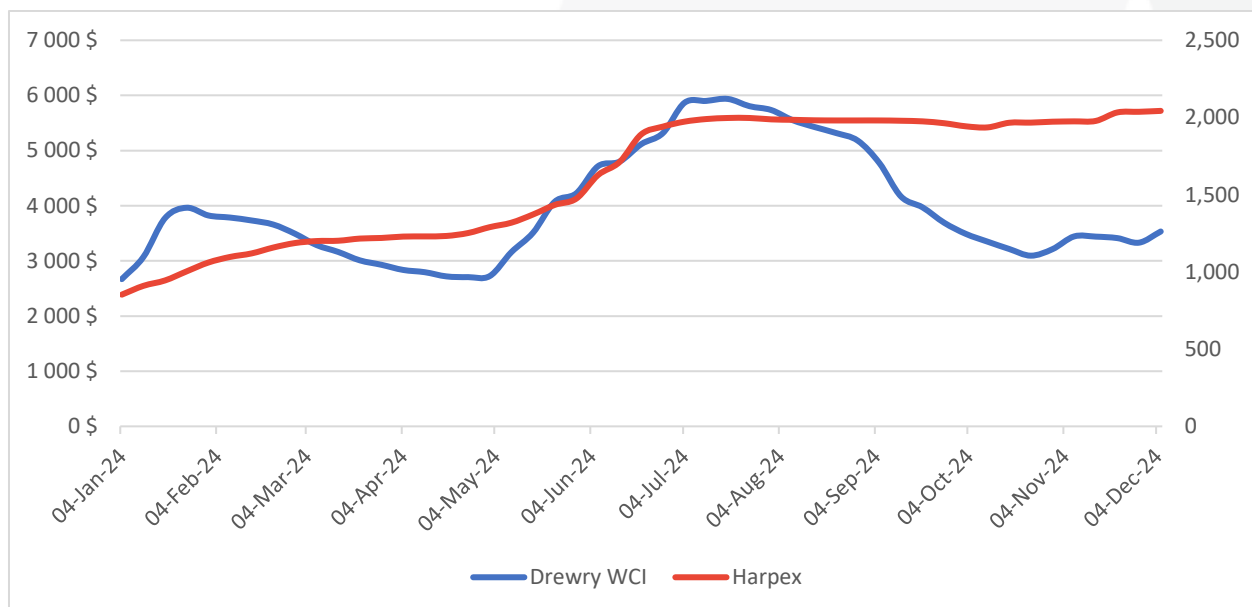
a. Global shipping industry

i. Global container freight rates and summary

Port congestion has remained stable in recent weeks and hovers around the **2,5 million TEU mark**, accounting for **7% of the global fleet**.¹¹ In South Africa, port congestion at the Port of Durban increased this week, as some **35 000 TEU** capacity is waiting to be offloaded outside at anchorage. The queue-to-berth ratio at Durban increased to **0,94** late on Sunday.¹²

Freight rates have continued fluctuating as Drewry's "World Container Index" increased by **↑6,1%** (or **\$202**), trading at **\$3 533 per 40-ft container**.¹³ Charter rates have remained elevated, as the *Harper Petersen Index* (Harpex) traded around **2 043 points** (**↑0,3%**, w/w) on Friday. The following illustration shows the differing trend between the two since the start of the year:

Figure 14 – World Container Index and Charter rates (YTD, \$ per 40ft, index)



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

Elsewhere, Alphaliner reported this week that The Mediterranean Sea will soon be designated as an Emission Control Area (ECA). From the 1st of May 2025, vessel operators will have to reduce the sulphur content of marine fuels from the current global ceiling of **0,5% m/m** to **0,1% m/m** in that region.¹⁴ Therefore, along with the Red Sea crisis, the ongoing re-shuffling of schedules is set to continue. Indeed, the Red Sea crisis has significantly influenced containership deployment, particularly on the Asia-Europe route, where vessels were rerouted around the Cape of Good Hope, requiring more ships to meet demand due to longer sailing distances.¹⁵ This disruption, alongside increased supply from new shipbuilding, has led to a notable shift in deployment trends, with a rising share of 12 000 to 17 000 TEU vessels across various trade lanes, including

¹¹ Linerlytica. 09/12/2024. [Market Pulse 2024 Week 48](#).

¹² Linerlytica. 08/12/2024. [Port Congestion Watch](#).

¹³ Drewry. 05/12/2024. [World Container Index](#).

¹⁴ Alphaliner. 06/12/2024. [The Mediterranean Sea will soon be designated as an Emission Control Area \(ECA\)](#).

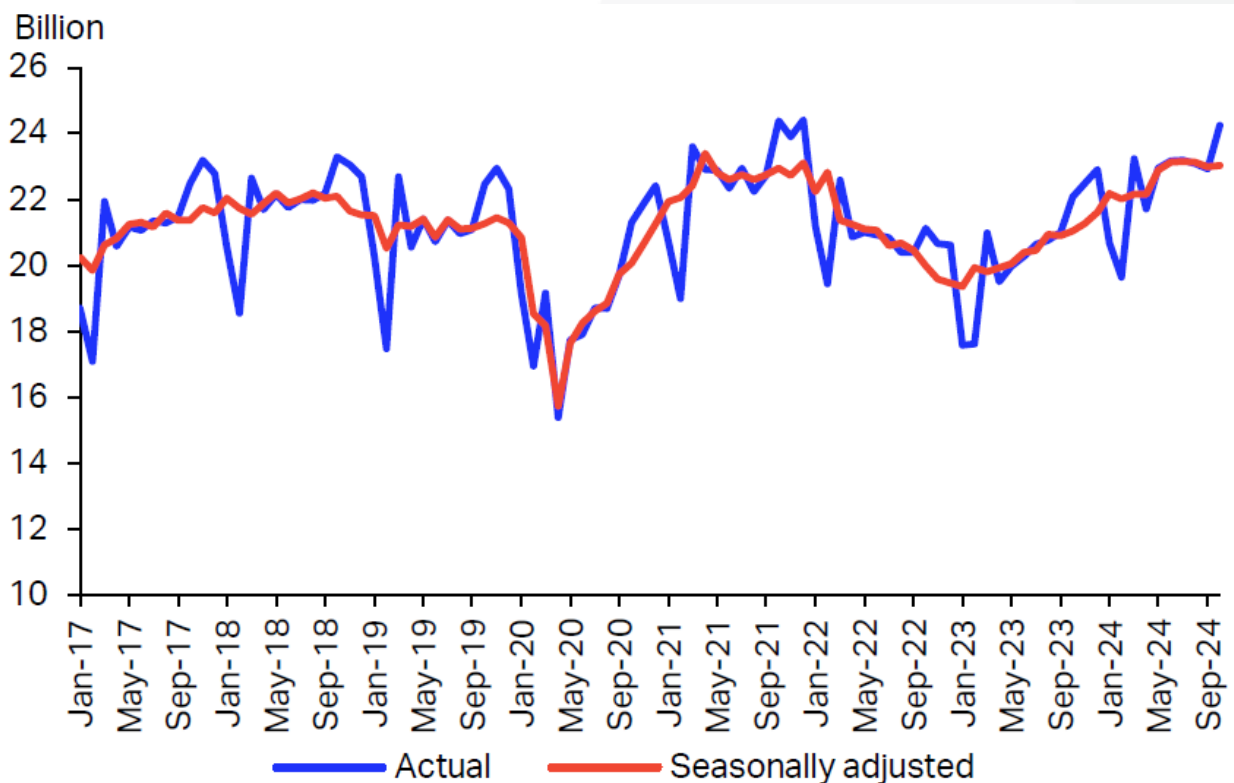
¹⁵ Koo, A. 02/12/2024. [The Red Sea crisis and its impact on containership deployment](#).

the transpacific and Far East–South America. While the impacts have been less extreme than during the COVID-induced market swings, deployment in larger vessel sizes has seen substantial adjustments.

b. Global air cargo industry

In October, global cargo tonne-kilometres (CTK) grew by **↑9,4%** (y/y), marking the 15th consecutive month of growth. Monthly, air cargo demand increased by **↑5,7%** after seasonal adjustments. International CTK expanded by **↑10,3%** compared to last year, with growth evident across all regions and major trade lanes. Global air cargo capacity, measured in available cargo tonne-kilometres (ACTK), grew by **↑5,9%** (y/y) in October, reaching record-high levels. Finally, global air cargo yield continues to rise, while jet fuel prices have fallen year-on-year. The following figure highlights this sustained growth trend, showing record-high CTK volumes in October, with year-to-date demand up **↑12,2%** from 2023:

Figure 15 – Global air cargo industry CTK (billions)

























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

The figure emphasises the industry’s resilience and ongoing recovery, with significant contributions from all major regions and trade lanes. For Africa, CTKs in October are up by **↑1,6%** (y/y) and **↑10,6%** year-to-date, with capacity up by **↑16,1%** so far in 2024.

In the high-frequency metrics, worldwide air cargo rates rose to a 2024 high in November of **US\$2,76 per kilogram**, despite a slight (**↓2%**) drop in flown tonnages compared with October, although demand and pricing both remain significantly above their already elevated levels last November, according to the latest figures and analysis by World ACD Market data:

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%	-4%		+4%	-2%		-0%	+9%
Asia Pacific		-0%	+5%		+2%	+9%		+1%	+8%
C. & S. America		+2%	+6%		+5%	+10%		+5%	+6%
Europe		-1%	-0%		+0%	+3%		+7%	+8%
M. East & S. Asia		+1%	+1%		+1%	+9%		-0%	+44%
North America		+2%	+4%		-3%	+12%		+3%	+0%
Worldwide		+0%	+2%		+1%	+8%		+3%	+9%

Source: [World ACD](#)

The figures reflect worldwide air cargo markets that remain relatively strong, including ex-Asia Pacific. However, good planning by air cargo stakeholders looks set to avert a major peak season capacity crunch, and very steep rate rises in the year's final weeks.

ENDS¹⁶

¹⁶ACKNOWLEDGEMENT:

*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 (SAFF) and distributed by Business Unity South Africa (BUSA). SAFF 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.
- An impressive **24-hour turnaround** time.

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