

Cargo Movement Update #220¹

Date: 9 February 2025

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)	35 791	40 777	76 568	37 786	43 050	80 836	↓5%
Air Cargo (tons)	3 553	3 838	7 390	3 726	2 545	6 271	↑18%

Monthly Snapshot

Figure 1 – Cyclical⁴ monthly cargo volume, year on year (most metrics: Dec '23 vs Dec '24, % growth)

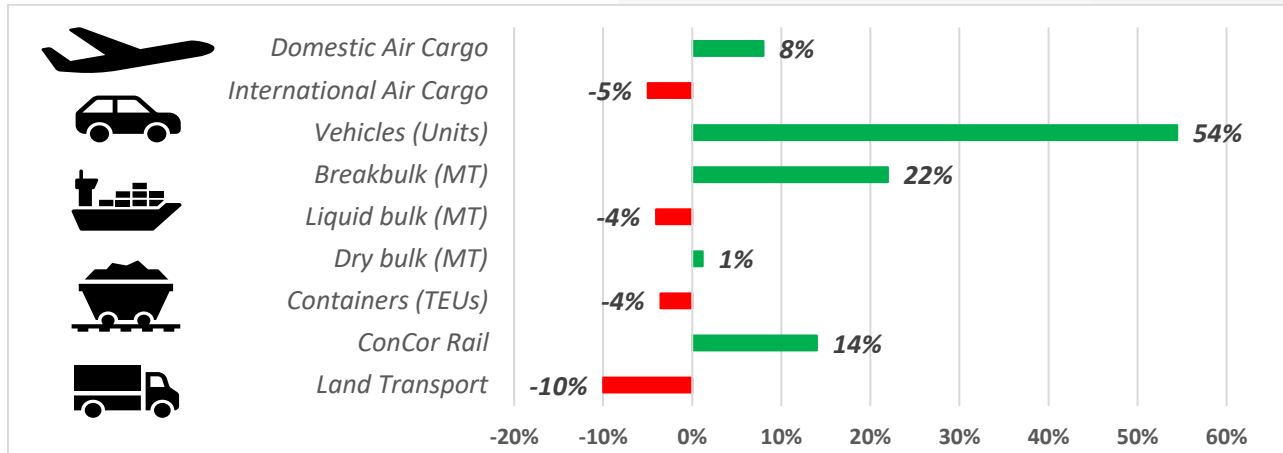
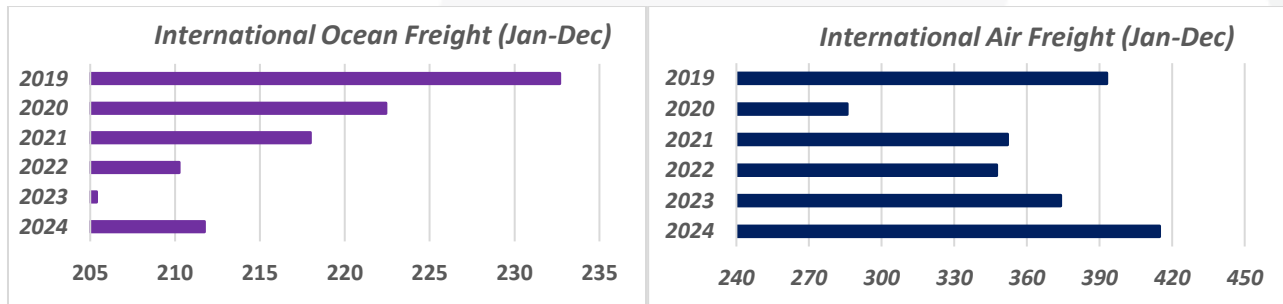


Figure 2 – Year-to-date flows 2019-2024⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~10 938 TEUs was handled per day, with ~12 123 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 2 207 containers, down ↓20% from last week.
- Truck volumes through Lebombo are slightly up at 1 453 HGVs/day (↑2%), with an average queue of 2,3km.
- Cross-border queue: ↓1,2 hrs; transit: ↓1,1 hrs; SA borders: 12,2 hrs (↑14%); SADC: 5,8 hrs (unchanged).
- Global container volume (dry & reefer) is up by ↑4,5% (m/m) and ↑7,6% (y/y) in December. FY: ↑5,7%.
- Global container spot rates cooled again this week, dropping by ↓2,7% to \$3 273/40-ft.
- Global air cargo tonnages dropped by ↓12% (w/w) this week, with average rates around \$2,44/kg.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 220th 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—most metrics: Dec vs Dec.

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 provides a consolidated overview of the South African logistics network and the current state of international trade. In our container terminals, a decreased average of **10 938 TEUs** was handled per day, down from **11 548 TEUs** last week. Adverse weather, vacant berths, equipment breakdowns and shortages mainly constrained port operations. The Port of Cape Town conceded more than 30 operational hours this week to adverse weather, while the main operational constraints in Durban proved to be adverse weather and continuous equipment breakdowns. Inclement weather conditions and vacant berths mainly impacted operations at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay. The latest reports suggest that a hook-up occurred on the ConCor line near Denville, Pretoria, on Saturday (1 February), with monthly maintenance operations occupying the line between 06:00 and 18:00 on Monday (3 February). Additionally, the latest reports from Maersk suggest that the operational landscape at our South African ports has improved recently, with port throughput increasing after the festive period.

Global container volumes rebounded in December, increasing by **↑4,5%** (m/m) and **↑7,6%** (y/y), with full-year throughput reaching **183,2 million TEUs** – a **↑5,7%** rise from 2023. Key trade lanes, including the Indian Sub-Continent and the Middle East, saw double-digit growth, while Sub-Saharan African (SSA) exports rose by **↑13,4%** (m/m). However, South Africa's share of SSA trade continues to decline, highlighting the need for urgent logistics reform. Red Sea disruptions persist, with most major carriers avoiding the Suez Canal and rerouting via the Cape of Good Hope until at least March. Despite some sub-Panamax ships continuing to transit, Suez volumes remain at historical lows. The container shipping alliances are shifting, with Ocean Alliance retaining the largest market share (**35%**) and Gemini Cooperation (Maersk and Hapag-Lloyd) emerging as a key player. Port congestion eased slightly, with **8% of the global fleet** stuck in delays. Freight rates cooled, with the World Container Index down **↓2,7%** (w/w) but still **↑130%** above pre-pandemic levels. Charter rates remain elevated, with Maersk paying **\$100 000/day** to secure scarce post-Panamax vessels. South Africa's logistics inefficiencies threaten competitiveness, underscoring the need for infrastructure investment, public-private collaboration, and regulatory reforms. Other developments include **(1)** Panama Canal update amidst US pressure, **(2)** disappointing financial results for DSV amidst Schenker takeover, and **(3)** Hapag-Lloyd securing \$3,4bn of 'green finance' towards the latest new builds.

In the air cargo space, the daily average of air cargo handled at ORTIA in the previous week amounted to **507 356 kg** inbound (**↓5%**, w/w) and a substantial **548 231 kg** outbound (**↑51%**). The significant increase in the outbound cargo means that the total volume for January is up by **↑34%** (y/y) versus 2024, which bodes well for the rest of the year. Internationally, worldwide air cargo recorded a **↑2%** year-on-year) tonnage increase in January, well below the **↑11%** average growth last year, facing more authoritarian comparison figures, moderating e-commerce volumes, and an earlier-than-last-year slowdown ahead of East Asia's Lunar New Year (LNY) holidays. In other air cargo news, President Trump's recent executive orders have imposed additional tariffs on imports from China, Canada, and Mexico while also suspending the "de minimis" trade exemption for these countries, which previously allowed duty-free imports of goods valued under \$800.

Very few disruptions have been reported along the Lebombo Border Post and N4 Corridor, with truck volumes slightly up versus last week at **1 453 HGVs per day** (**↑2%**, w/w). The average queue for the week was around **2,3km**, as the average border time hovered around **4,5 hours** per crossing. Rail to Maputo has decreased to **three trains a day** on average in the last week. Sugar trains from Eswatini are constant at around **two trains a day**.

For the rest of SADC borders, the average queue times decreased by approximately **an hour and a quarter** from last week, as the transit times decreased by nearly the same magnitude. However, the median border

crossing times at South African borders increased by **an hour and a half**, averaging **~12,2 hrs** (**↑14%**, w/w) for the week. In contrast, the greater SADC region (excluding South African controlled) remained unchanged from last week, averaging **~5,8 hrs**. On average, three SADC border posts took more than a day to cross: Beitbridge, Kasumbalesa (the worst affected, taking nearly **a day and a half** to cross from the Zambian side), and Skilpadshék. Other developments include **(1)** Groblersbrug (GRB) reopened, **(2)** intermittent power outage at Kopfontein, and **(3)** Zimbabwe anti-smuggling impacts and disputes.

In the aftermath of the President's **State of the Nation Address** (SONA), we can take stock of the last year's developments in our industry. Since SONA 2024, progress has been uneven, with some positive steps but persistent inefficiencies and poor productivity in ports and rail logistics. Although the Freight Logistics Roadmap provides strategic direction, tangible, urgent reform is still lacking. Open rail access is a milestone, yet implementation remains slow. The commitment to port equipment procurement is welcomed (despite the legal uncertainty around Pier 2), but delivery timelines remain unclear. Private sector participation (PSP) must now shift from policy to execution, unlocking CAPEX, efficiency, and innovation. On AfCFTA, the vision remains unchanged, yet logistics barriers prevent real trade gains. The message is clear: Government and industry must move from discussion to rapid, accountable implementation. The time for delays is over—logistics reform must deliver measurable results, starting now.

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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. The reporting aligns with TPT's cycle, which runs from Mondays to Sundays.

Table 2 – Container Ports – Weekly flow reported for 3 to 9 February (measured in TEUs)

7-day flow reported (03/02/2025 – 09/02/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 629	32 403	↑8%
New Pier (Pier 1)	1 671	11 694	↓17%
Cape Town Container Terminal	1 822	12 757	↓4%
Ngqura Container Terminal	1 709	11 961	↓11%
Port Elizabeth Container Terminal	178	1 963	↑5%
Other	827	5 790	↓28%
Total	10 938	76 568	↓5%

Source: Calculated from TPT, 2025. Updated 09/02/2025.

A decreased average of ~**10 938 TEUs (↓5%)** was handled per day for the last week (3 to 9 February, Table 2), compared to the projected average of ~**12 123 TEUs (↓10% actual versus projected)**.

For the coming week, an increased average of ~**12 123 TEUs (↑10%)** is predicted to be handled (10 to 16 February, Table 3). Adverse weather, vacant berths, equipment breakdowns and shortages mainly constrained port operations.

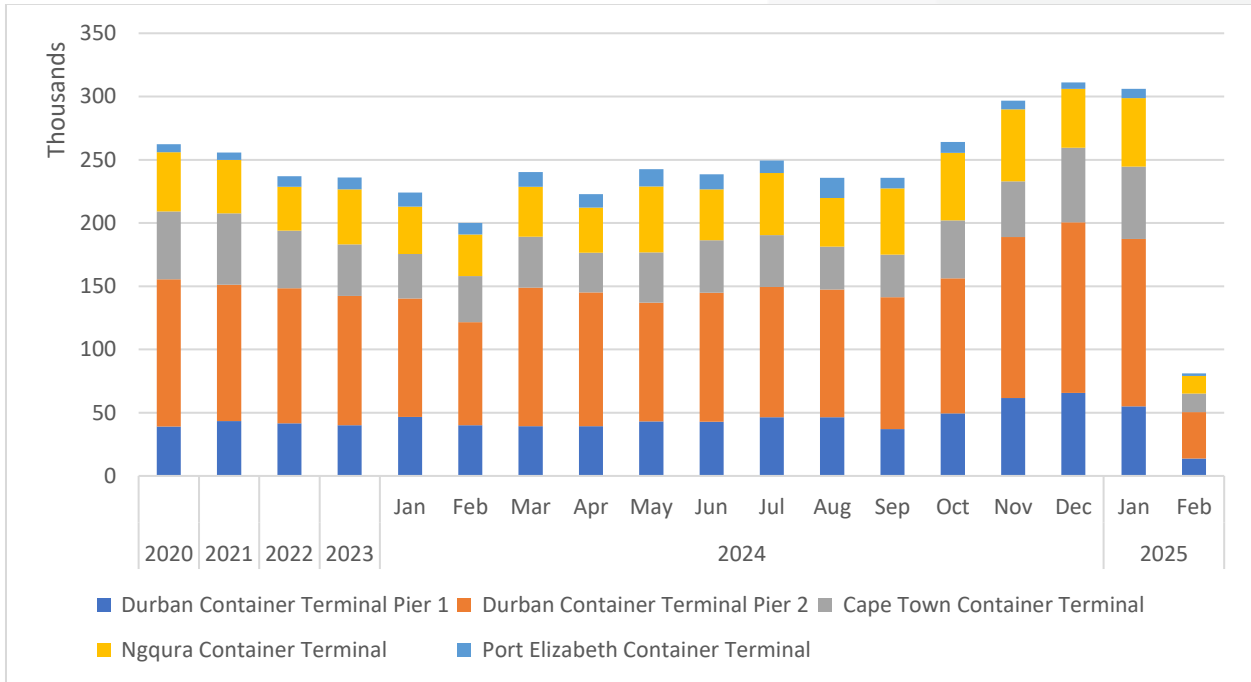
Table 3 – Container Ports – Weekly flow projected for 10 to 16 February (measured in TEUs)

7-day flow reported (10/02/2025 – 16/02/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 044	35 308	↑9%
New Pier (Pier 1)	1 859	13 012	↑11%
Cape Town Container Terminal	2 059	14 414	↑13%
Ngqura Container Terminal	2 151	15 057	↑26%
Port Elizabeth Container Terminal	178	1 246	-
Other	832	5 821	↓1%
Total	12 123	84 858	↑11%

Source: Calculated from TPT, 2025. Updated 09/02/2025.

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.

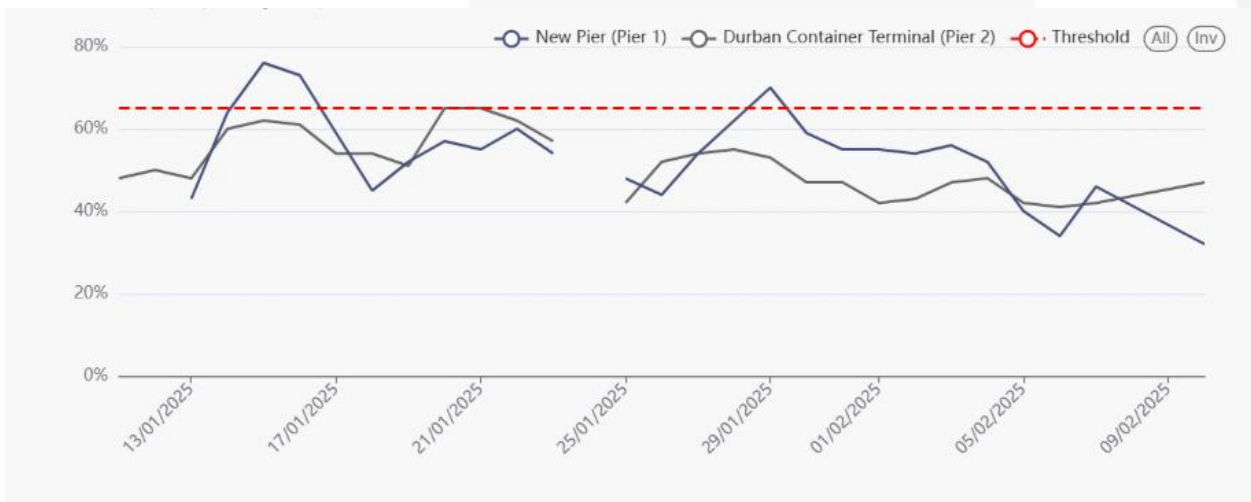
Figure 3 – Monthly flow reported for total container movement (TEUs thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 09/02/2025.

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

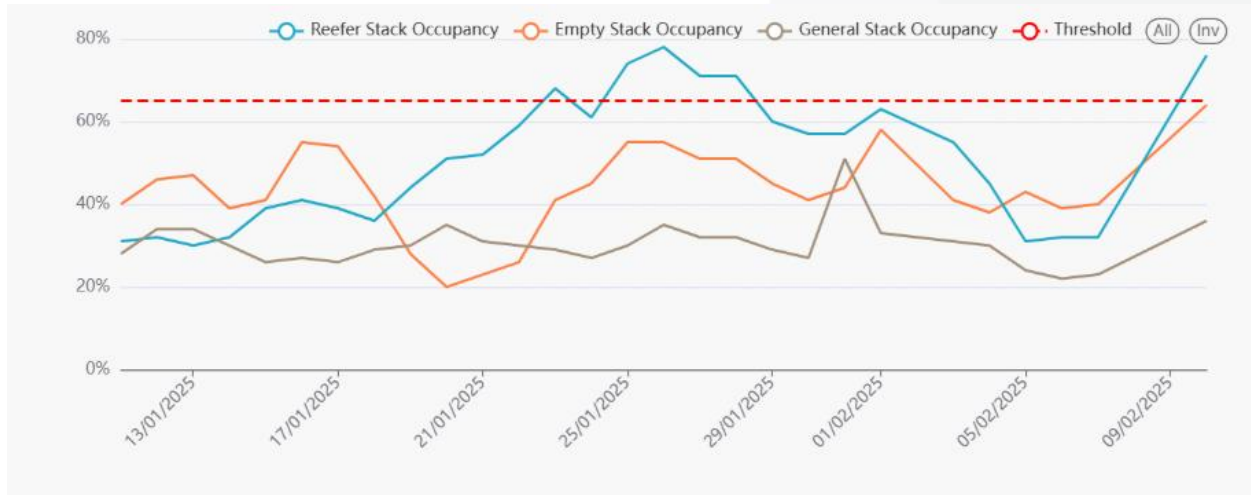
Figure 4 – Stack occupancy in DCT, general-purpose containers (13 January to present; a day on the day)



Source: Calculated using data from Transnet, 2025, and updated 09/02/2025.

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 (13 January to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 09/02/2025.

b. Summary of port operations

i. Weather and other delays

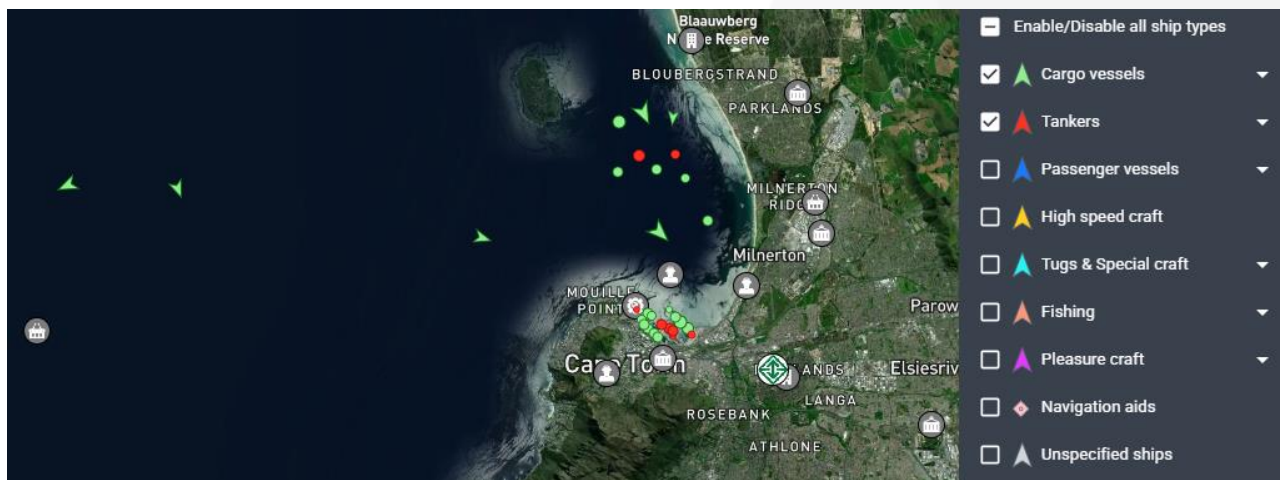
- The Port of Cape Town conceded more than 30 operational hours this week to adverse weather.
- The main operational constraints in Durban proved to be adverse weather and continuous equipment breakdowns.
- Inclement weather conditions mainly impacted operations at our Eastern Cape Ports.
- Minimal delays were reported at the Port of Richards Bay.

ii. Cape Town

On Thursday, CTCT recorded two vessels at berth and four at anchor as strong winds proved to be the primary operational constraint. On the landside, between Monday and Thursday, the terminal managed to service 4 279 trucks while handling approximately 212 rail units. On the waterside, the terminal executed approximately 5 193 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 22%, reefers at 32%, and empties at 39%**. Additionally, the terminal operated with **eight STS cranes, 22 RTGs, and 68 hauliers** towards the end of the week. The latest reports suggest that Crane LC1 remains out of commission, with no ETR yet communicated.

On Thursday, CTMPT recorded two vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 124 container moves and 6 482 tons of cargo across the quay on the waterside despite being windbound for the entire night shift. On the landside, 150 trucks were processed during the same period. Stack occupancy was recorded at 13% for general cargo, 72% for reefers, and 22% for empties. Towards the end of the week, the terminal operated with two cranes. Crane LM600 made a welcome return to service this week; however, LM400 experienced a hook rotation fault, rendering the machine out of commission for the entire week. No ETR has been communicated yet.

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



Source: Marine Traffic. Updated 09/02/2025 at 14:00.

iii. Durban

The Port helicopter remained out of commission this week as the technical team is currently performing maintenance operations on the aircraft. The latest reports suggest that the plane will be out of service for the next three weeks.

On Thursday, Pier 1 recorded two vessels on berth, operated by four gangs, with zero vessels at anchor. Stack occupancy was **34%** for **GP containers**. Between Monday and Thursday, the terminal executed approximately 4 140 gate and 137 rail moves on the landside. The **average TTT** for the week was **~84 minutes (↓20%, w/w)** and an average **staging time** of **~51 minutes (↓35%)**. Additionally, the terminal moved over 3 000 TEUs across the quay on the waterside during the same period. The terminal operated with **four STS cranes** and **12 RTGs** towards the end of the week. The terminal experienced some operational delays due to strong winds and equipment breakdowns during the week.

Pier 2 had four vessels on berth and two at anchorage on Thursday, as adverse weather and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **41%** for **GP containers**. The terminal operated with **ten gangs** and moved over 11 000 containers across the quay between Monday and Thursday on the waterside. Approximately 8 156 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~85 minutes (↑20%, w/w)** and a staging time of **~72 minutes (↓33%)**. Approximately 653 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **44** and **47** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **52%** during this period. Cranes 520, 522, 530, 531, and 533 are currently the most notable crane absentees. An ETR was announced for Crane 531, which is set to return to operations around 16 February, while Cranes 530 and 533 are anticipated to return to service over the weekend.

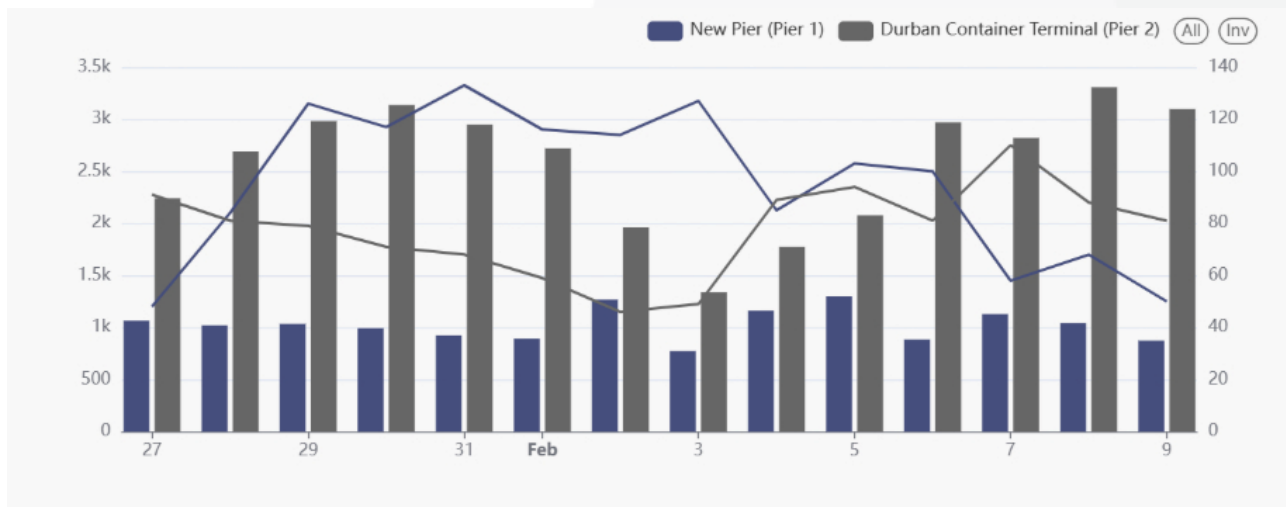
Durban's MPT terminal recorded two vessels at berth on Thursday and none at outer anchorage. Stack occupancy for containers was 41%, with the breakbulk stack around 10%. In the preceding 24 hours, the terminal handled 512 containers and zero tons of breakbulk on the waterside. On the landside, 407 container trucks and five breakbulk RMTs were serviced. During this period, three cranes, eight reach stackers, seven forklifts, and 13 ERFs were in operation.

On Wednesday, the Maydon Wharf MPT recorded zero vessels at berth or anchor. On the waterside, no volumes were handled across the quay due to no vessels on the berth. The latest reports suggest that the next vessel is scheduled to arrive around 11 February. On the landside, 55 trucks were handled in the 24 hours leading to Thursday, containing approximately 1 897 tons. No waterside nor landside volumes were handled at the agri-bulk facility this week, with the next vessel destined for the terminal scheduled for arrival around 20 February.

On Wednesday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with none at anchorage. In the 24 hours before, the terminal handled 594 road and 300 rail units on the landside while handling 367 units on the waterside. Overall stack occupancy was 20%, 20% at Q&R, and 30% at G-berth. During this period, the terminal had 132 high-and-heavy (abnormal loads) on hand and managed to handle 46.

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.

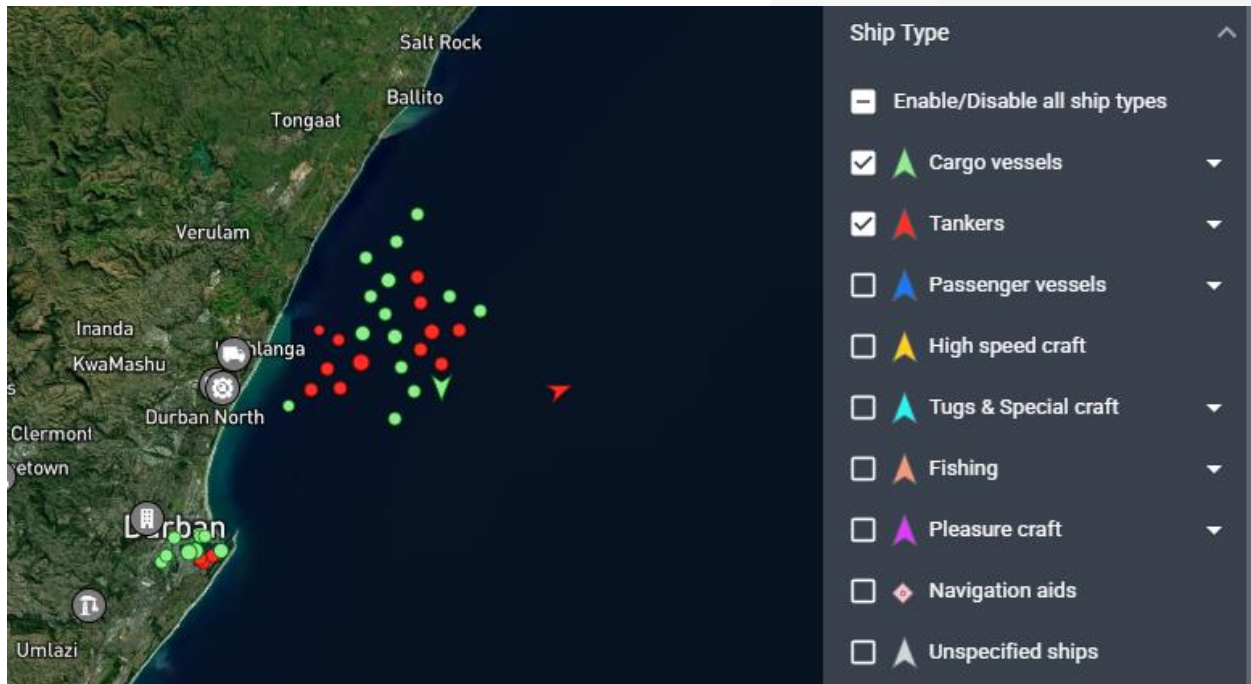
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 09/02/2025.

The queue of container vessels waiting outside Durban remains very low, as vessels are currently berthing on their CTOC arrangements. On Monday evening (10 February), **zero** container vessels were waiting for Pier 1, **one** for Pier 2, and none for Point. Several bulk vessels remain in the queue, as evidenced by the snapshot:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 09/02/2025 at 14:00.

iv. Richards Bay

On Thursday, Richards Bay had ten vessels at anchor and six on the berth, translating to two vessels at DBT, two at MPT, one at RBCT, and one at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources towards the end of the week. The daily average for the week decreased significantly to around **130 000 tons** (↓11%, w/w). An average of **18 trains** (down by one from last week) were serviced on the landside, still slightly below the target of 22.

v. Eastern Cape ports

On Thursday, NCT recorded two vessels on berth and none at anchor, with none drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. Stack occupancy figures were recorded at 22% for reefers, 33% for reefer ground slots, and 17% for the general stack. Despite being windbound for more than 12 hours during this period, the terminal handled approximately 555 TEUs on the waterside. Approximately 73 trucks were processed on the landside at a TTT of ~30 minutes. Towards the end of the week, the terminal reported a full complement of equipment.

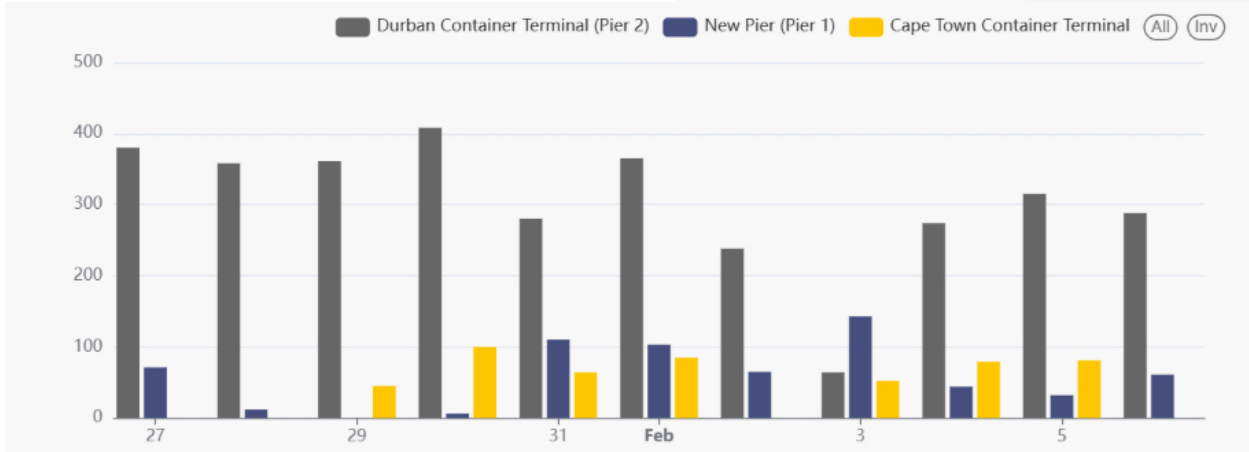
On Thursday, GCT had one vessel at berth and zero at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the preceding 24 hours. During this period, 118 trucks were processed at a TTT of ~19 minutes on the landside, while 266 TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 17% for the general stack, 6% for reefers, and 17% for reefer ground slots. The terminal experienced some operational constraints, such as adverse weather conditions and vacant berths.

On Wednesday, the Ro-Ro terminal recorded one berthed vessel and zero vessels at anchor. On the waterside, the terminal handled 1 221 units across the quay in the 24 hours before, resulting in a stack occupancy of 2%.

vi. Transnet Freight Rail (TFR)

The latest reports suggest a hook-up occurred on the ConCor line near Denville, Pretoria, on Saturday (01 February). The line seemingly reopened on Sunday (2 February) but still affected the volumes out of Durban. Furthermore, monthly maintenance operations took place on the ConCor on Monday, which occupied the line between 06:00 and 18:00. Towards the end of the week, DCT Pier 2 had 187 ConCor units on hand with a dwell time of 144 hours and 321 over-border units with a dwell time of 70 days.

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



Source: Calculated using data from Transnet, 2024. Updated 09/02/2025.

In the last week (3 to 9 February), rail cargo handled out of Durban was reported at **2 207** containers, down by **↓20%** from the previous week's **2 757** containers.

vii. General Update

The latest reports from Maersk suggest that the operational landscape at our South African ports has improved recently, with port throughput increasing after the Festive Period. CTCT and CTMPT have 2-4 days reported waiting time, with PECT and Coega having none. Additionally, the same reports suggest that the political situation in Mozambique has eased recently. Beira and Maputo, however, still have high waiting times, with Port Louis recovering from the low productivity and the delays experienced in the fourth quarter of 2024. The cyclone conditions around Madagascar are being monitored as heavy rain continues to fall.

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 27 January. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *January 2024* averaged **~675 347 kg** daily.

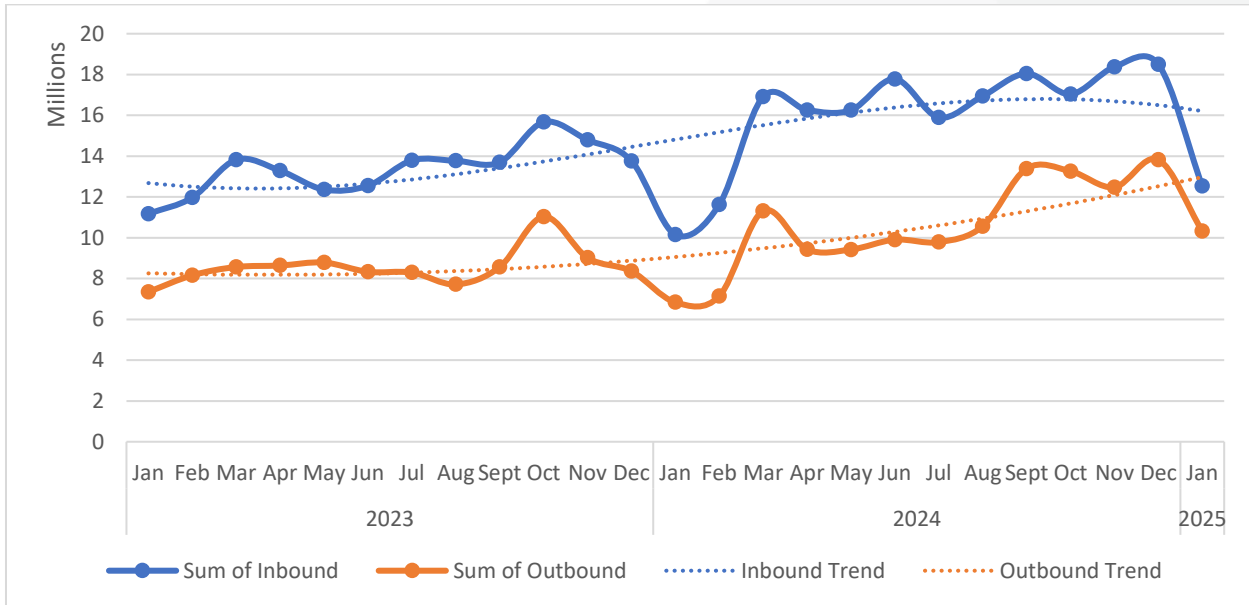
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	27-Jan	28-Jan	29-Jan	30-Jan	31-Jan	01-Feb	02-Feb	Week
Volume inbound	441 179	158 640	426 205	150 683	337 887	300 949	1 737 211	3 552 754
Volume outbound	129 710	116 881	207 976	157 383	1 909 080	219 927	1 096 658	3 837 615
Total	570 889	275 521	634 181	308 066	2 246 967	520 876	2 833 869	7 390 369

Courtesy of ACOC. Updated: 09/02/2025.

The daily average of air cargo handled at ORTIA in the previous week amounted to **507 356 kg** inbound (↓5%, w/w) and a substantial **548 231 kg** outbound (↑51%). The significant increase in the outbound cargo means that the total volume for January is up by **↑34%** (y/y) versus 2024, which bodes well for the rest of the year. The following figure shows the air cargo flows to and from ORTIA since the start of 2023:

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

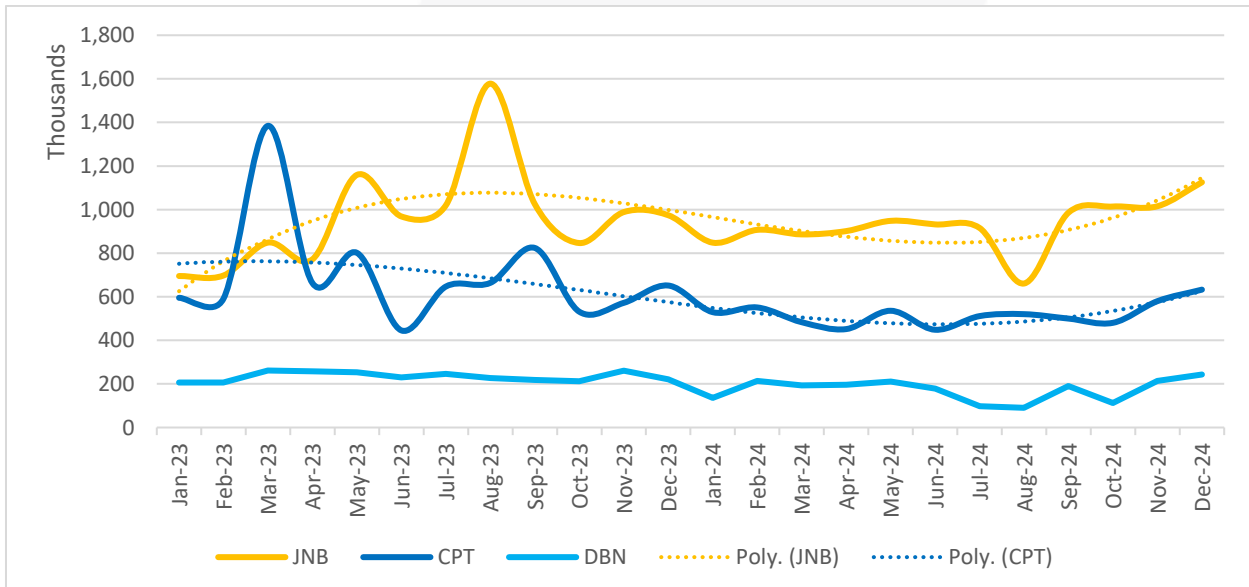


Calculated from ACOC. Updated: 09/02/2025.

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: 09/02/2025.

3. Road and Regional Update

a. Lebombo border post update

As of the week spanning 3 to February 9, very few reported disruptions or blockages affecting operations and cargo flows at the Lebombo Border Post and along the N4 Corridor between South Africa and Mozambique. The following notes summarise the recent developments:

- Truck volumes are slightly up versus last week at **1 453 HGVs per day (↑2%, w/w)**, with an average queue of **2,3km** and an average border time of around **4,5 hours** per crossing.
- Rail to Maputo has decreased to **three trains a day** on average in the last week.
- Sugar trains from Eswatini are constant at around **two trains a day**.

The following table summarises the flows in the last seven days:

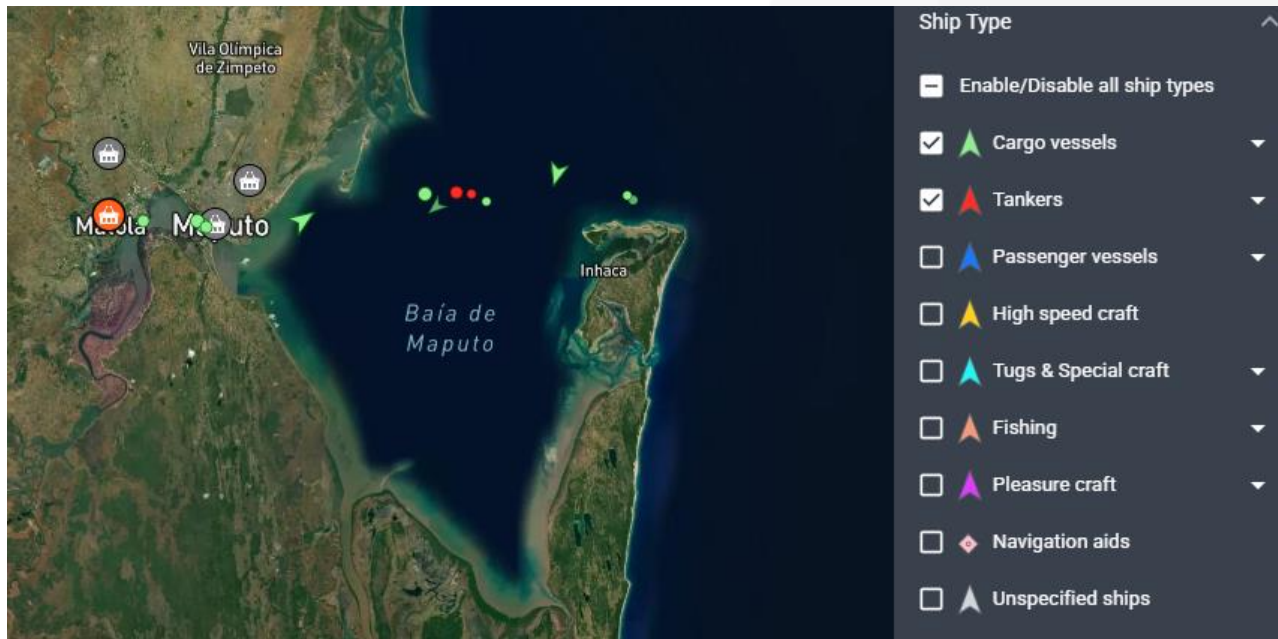
Table 5 – Lebombo border post update

Date 06h00 Daily	Total Trucks Entering KM4	Total Trucks Exit KM4	Mineral Trucks	General Cargo (including critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Empty Minerals	Total Trucks inside KM4 *staging	Total Trains	SA to Maputo	KM4 - to Maputo	Eswatini to Maputo
Design Capacity	1 500	1 500	1 200	200	n/a	50	50	No delays	2 000	20	10	6	4
03-Feb-25	1 305	1 431	1 187	111	14	95	24	No delays	108	7	4	1	2
04-Feb-25	1 066	987	813	81	31	51	11	No delays	244	0	not reported	0	not reported
05-Feb-25	1 343	1 170	813	251	35	49	22	No delays	247	0	not reported	0	not reported
06-Feb-25	1 432	1 412	960	270	77	69	36	No delays	249	1	1	0	0
07-Feb-25	1 687	1 603	1 156	272	58	90	27	No delays	208	10	6	1	3
08-Feb-25	1 712	1 693	1 278	261	52	54	48	No delays	230	1	not reported	1	not reported
09-Feb-25	1 628	1 551	1 135	248	56	47	65	No delays	292	1	not reported	1	not reported
% of design capacity	109%	103%	95%	124%	n/a	94%	130%	n/a	15%	5%	n/a	17%	n/a
% deviation from prev. 24 hours	-5%	-8%	-11%	-5%	8%	-13%	35%	n/a	1%	n/a	n/a	n/a	n/a

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 09/02/2025.

The following shows a snapshot of the vessels waiting for the Port of Maputo:

Figure 12 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 09/02/2025 at 14:00.

b. SADC 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 **an hour and a half**, averaging **~12,2 hrs (↑14%, w/w)** for the week.
 - In contrast, the greater SADC region (excluding South African controlled) remained unchanged from last week, averaging **~5,8 hrs**.
1. **Groblersbrug (GRB) reopened:**
 - a. Officially operational again from 30 January at 10 AM.
 - b. Trucks declared for exit at Kopfontein (KFN) or Skilpadshek (SKH) may be rerouted to GRB, provided declarations align with the relevant port of entry.
 2. **Intermittent power outage at Kopfontein:**
 - a. Caused by differences in load-shedding schedules and lack of fuel for the generator.
 - b. Power was restored within an hour, but intermittent issues persisted until Monday evening.
 3. **Zimbabwe anti-smuggling impacts and disputes:**
 - a. Reports of trucks stuck at Condep in Beitbridge for over a day.
 - b. Transporters claim trucks are stopped 60 km outside Beitbridge and forced to turn back unless a fee is paid.
 - c. Trucks are now forced to wait at Beitbridge for further inspections.
 - d. FESARTA attempted intervention but was informed that the team operates independently of the President.

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

Table 6 – Delays⁶ summary – South African borders (both directions)

Border Post	Direction	HGV ⁷ 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	449	24,0	5,4	23,6	13 470	3 143
Beitbridge	Zimbabwe-SA	461	10,2	1,5	10,1	13 830	3 227
Goblersbrug	SA-Botswana	167	12,0	1,2	11,6	5 010	1 169
Martins Drift	Botswana-SA	190	2,3	0,3	2,2	5 700	1 330
Kopfontein	SA-Botswana	240	10,7	2,1	11,0	7 200	1 680
Tlokweng	Botswana-SA	110	1,0	0,2	1,0	3 300	770
Vioolsdrift	SA-Namibia	30	4,8	1,6	5,5	900	210
Noordoewer	Namibia-SA	20	2,0	0,4	2,0	600	140
Nakop	SA-Namibia	30	5,7	1,3	5,4	900	210
Ariamsvlei	Namibia-SA	20	1,1	0,4	1,1	600	140
Skilpadshek	SA-Botswana	286	24,4	3,0	24,0	8 580	2 002
Pioneer Gate	Botswana-SA	123	2,2	1,2	2,1	3 690	861
Lebombo	SA-Mozambique	1 358	4,8	0,4	4,5	40 740	9 506
Ressano Garcia	Mozambique-SA	1 252	2,4	0,3	2,2	37 560	8 764
Sum/Average		4 736	7,7	1,4	7,6	142 080	33 152

Source: TLC, FESARTA, & Crickmay, week ending 02/02/2025.

Table 7 – 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	10,7	1,6	10,8	9 600	2 240
Central Corridor	798	2,0	0,3	2,0	23 940	5 586
Dar Es Salaam Corridor	1 819	8,0	0,7	7,4	54 570	12 733
Maputo Corridor	2 610	3,6	0,3	3,3	78 300	18 270
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 689	8,7	2,7	9,8	110 670	25 823
Northern Corridor	2 817	2,6	0,5	2,6	92 520	21 588
Trans Caprivi Corridor	116	2,7	1,2	2,6	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	439	7,9	1,3	7,7	13 170	3 073
Trans Oranje Corridor	100	3,4	0,9	3,5	3 000	700
Sum/Average	12 935	5,0	1,1	5,2	396 060	92 414

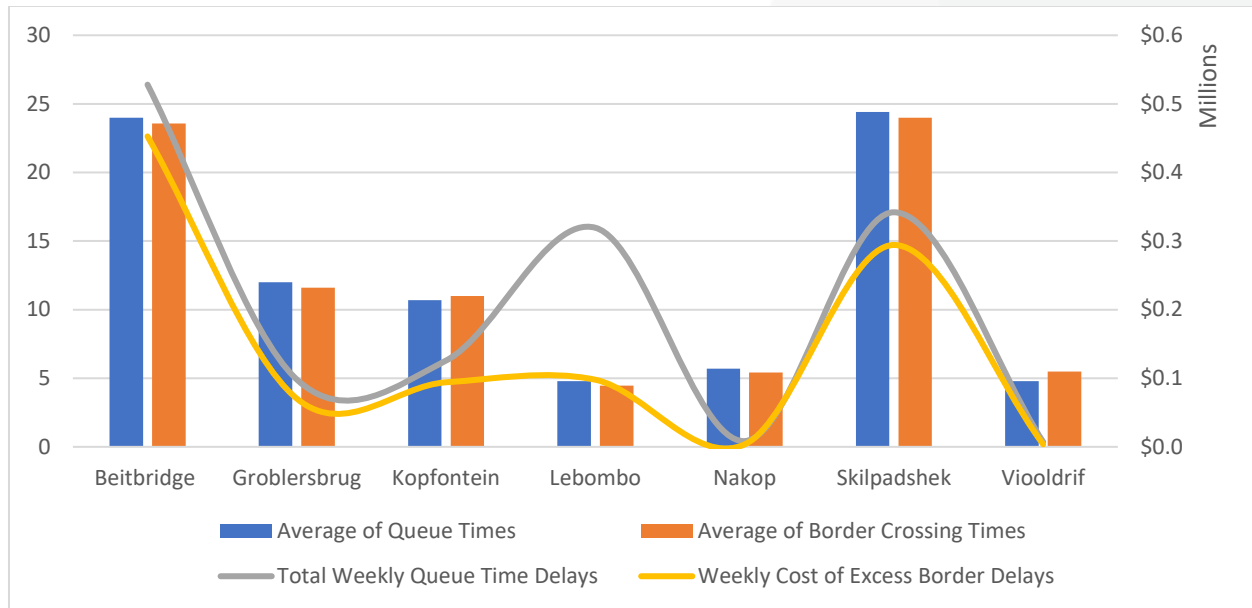
Source: TLC, FESARTA, & Crickmay, week ending 02/02/2025.

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

⁶ Delays are variable and stem from multiple causes, including poor infrastructure, congestion, and lack of stakeholder coordination, with limited border process transparency. Data comes from LMS (Crickmay and SAAFF). Stakeholders should report issues via the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.

⁷ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

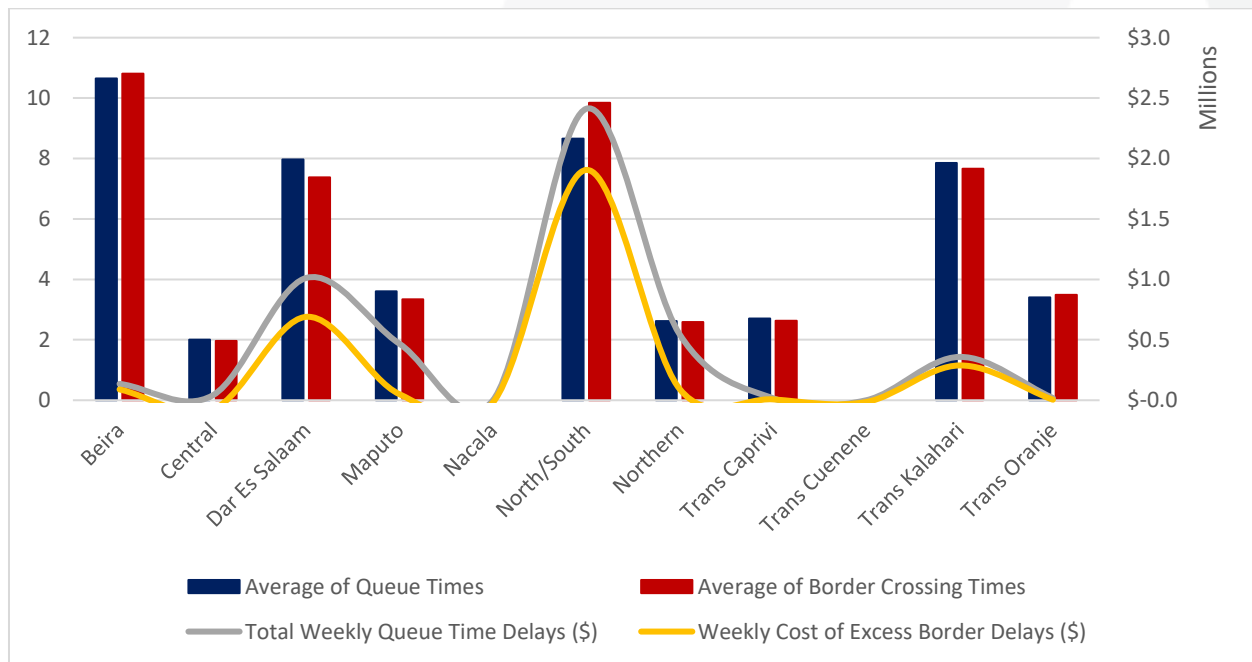
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 02/02/2025.

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

Figure 14 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 02/02/2025.

In summary, cross-border queue time averaged **~5,0 hours** (down by **~1,2 hours** from the previous week's **~6,2 hours**), indirectly costing the transport industry an estimated **\$5 million (R94 million)**. Furthermore, the week's average cross-border transit times hovered around **~5,2 hours** (down by **~1,1 hours** from the **~6,3 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$3 million (R56 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$8 million (R150 million)**, down by **~\$24 million or ↓14%** from **~\$174 million** in the previous report).

4. International Update

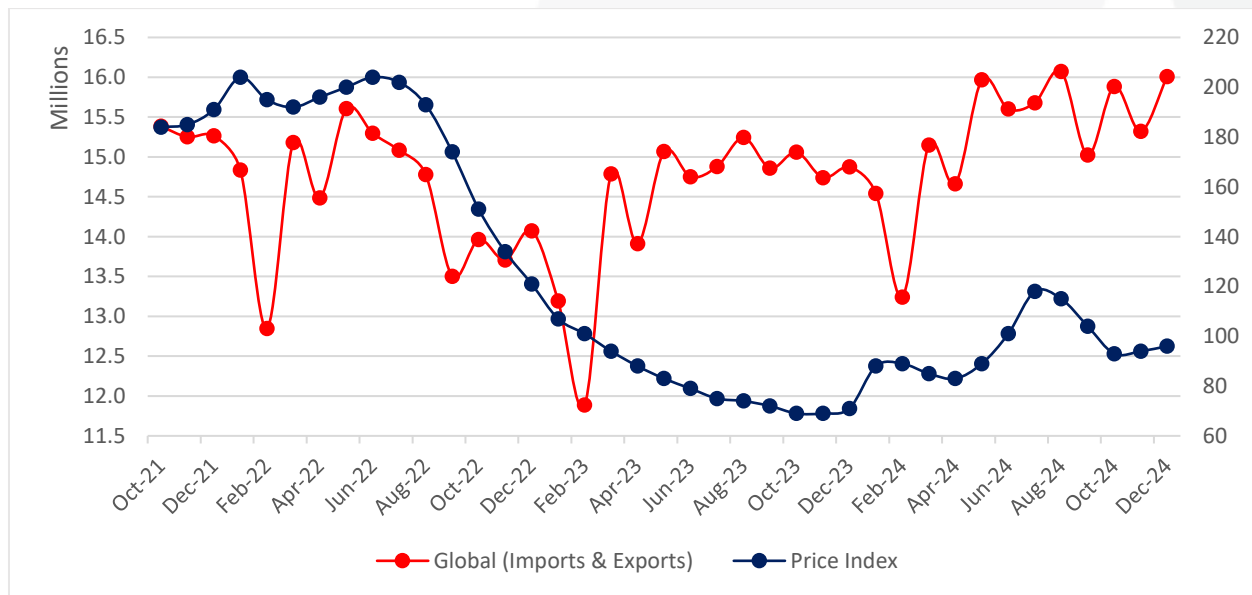
The following section provides some context around the global economy and its impact on trade, mainly an update on (a) the global shipping industry and (b) the global aviation industry.

a. Global shipping industry

i. Global container trade statistics – 2024

The latest container throughput figures for December from *Container Trade Statistics* (CTS) show that container volume has rebounded and increased by **↑4,5%** (m/m) after a decrease of **↓3,5%** (adjusted) in November. Annual throughput is up by **↑7,6%** (y/y), as global demand for complex goods remains relatively strong. Full-year data shows that **183,2 million TEUs** were traded in 2024, **nearly 10 million TEUs** more than in 2023 (**↑5,7%**). Most trade lanes experienced significant increases in December, with the Indian Sub-Continent and Middle East region seeing double-digit growth on both flows (**↑11,1%** for imports and **↑10,3%** for exports). Other double-digit growth includes European imports and Sub-Saharan exports. The global price index (dry and reefer combined) increased in December by **↑2,1%** monthly and a substantial **↑35,2%** yearly. The following figure illustrates the global container throughput and price index since October 2021:

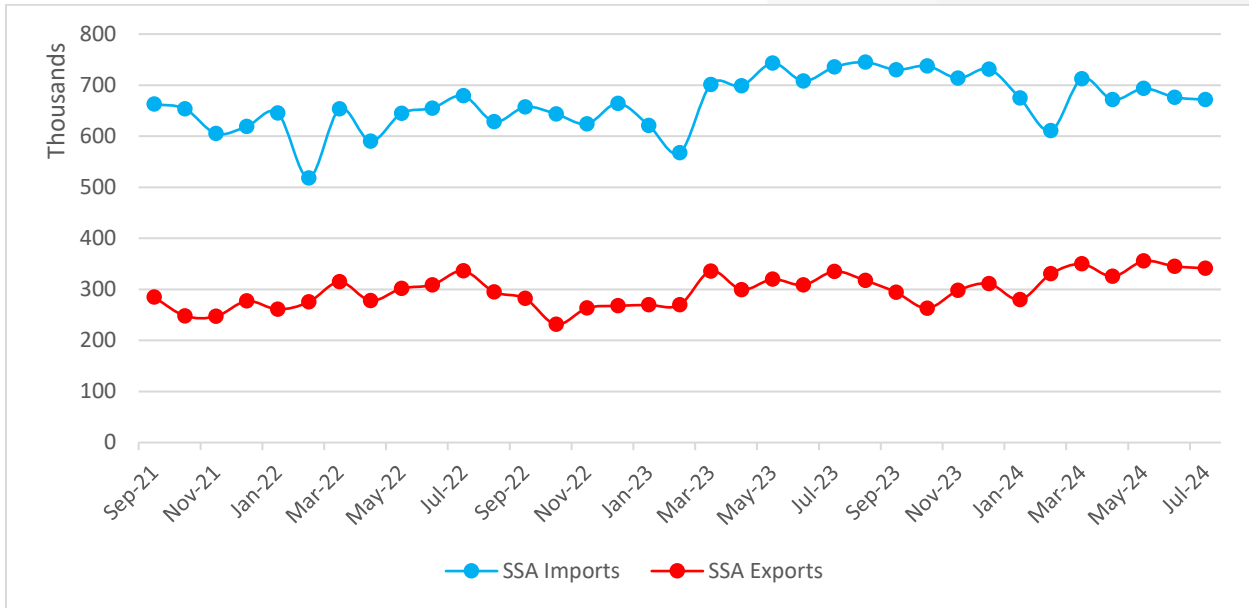
Figure 15 – Global Containerised Throughput (TEUs) and price index



Source: Calculated from [CTS](#)

Container throughput in December reached **16 million TEUs** – some **70 000 containers** off the record throughput of August. The following figure shows Sub-Saharan African trade over the same period, with a **↑13,4%** (m/m) increase in containers exported and a **↑6,1%** (m/m) increase in containers imported:

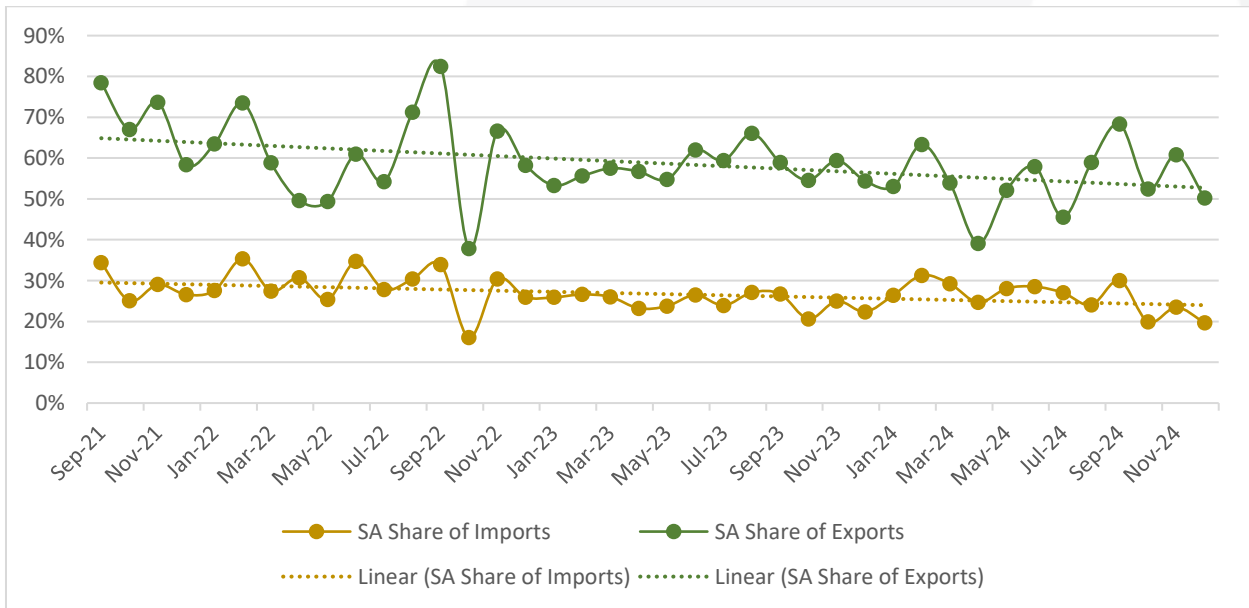
Figure 16 – Sub-Saharan Africa Containerised Throughput (TEUs)



Source: Calculated from [CTS](#)

Yearly SSA trade is also up – with exports up by **↑5,6%** (y/y) and imports up by **↑8,3%** (y/y). 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 December (**320 837 TEUs**):

Figure 17 – South Africa's share in regional containerised throughput (% share)



Source: Calculated from [CTS](#)

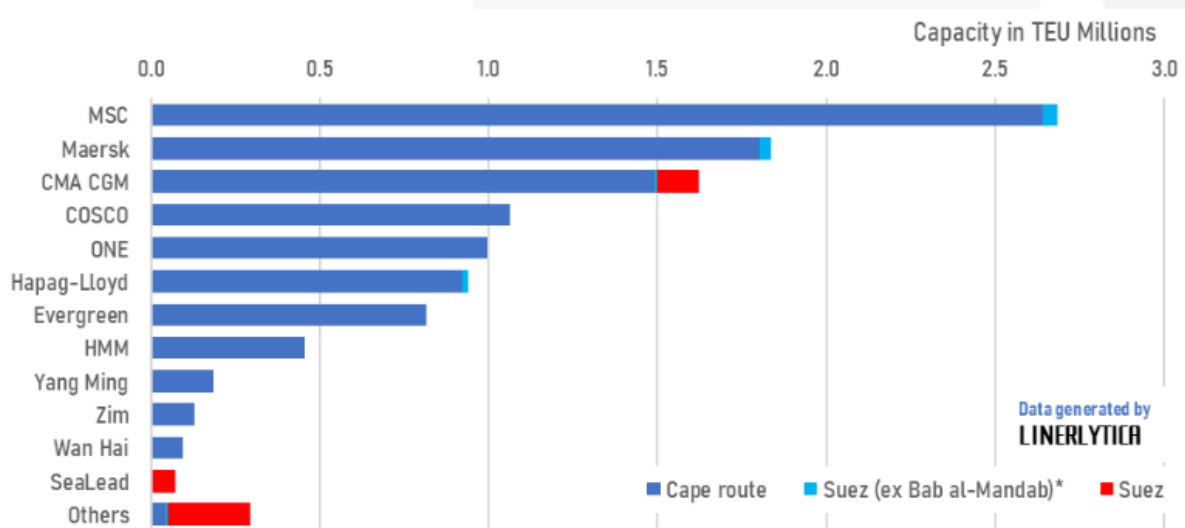
When measuring these, South Africa accounted for **20%** of SSA imports and **50%** of SSA exports in December, according to TNPA figures. These respective shares are significantly less than the highs of **35%** in February 2022 for imports and **82%** in September 2022 for exports. Indeed, South Africa’s regional share has continued to dwindle in recent years, which shows the urgent need for decisive interventions in our logistics

sector. Addressing chronic inefficiencies at ports and rail, improving infrastructure through public-private partnerships, and accelerating the implementation of the Freight Logistics Roadmap are essential to reversing this trend. Without these measures, South Africa risks further marginalisation in regional trade, eroding our competitiveness and economic growth prospects.

ii. Red Sea / Cape of Good Hope routing and container summary

Containerships diverted from the Red Sea are unlikely to return to the Suez anytime soon, as major carriers continue to route vessels via the Cape of Good Hope until at least March, according to Linerlytica’s survey of Suez-related deployments.⁸ While MSC, Maersk, and Hapag-Lloyd are sending some ships through the Suez, these only reach Jeddah and avoid the Bab al-Mandab Strait. CMA CGM is the only primary carrier still using the full Suez route, but mainly for Lebanon-bound services, representing just **8%** of its Suez-related capacity. Smaller carriers such as SeaLead, Safetrans, Messina, FESCO, M-Line, Akkon, OVP, Uniglobal, and C-Star continue to use the Suez for the Black Sea, North Africa, and Baltic trades. However, they account for less than **5%** of total deployed capacity. Indeed, since mid-January, less than 45 container ships have crossed the Suez Canal in either direction per week; however, **~78%** of those were sub-Panamax container vessels of less than **4 000 TEU capacity**.⁹ Ships of this size continue setting their records, with 130 vessels crossing the Canal in January 2025 - the highest vessel count in a single month for this sub-fleet.

Figure 18 – Capacity diverted from & retained on the Suez route (February 2025)



Source: [Linerlytica](#)

Elsewhere, the shipping alliance landscape is continuing to evolve. As of 1 February, the deep-sea container shipping landscape from Asia to North America and Europe has shifted.¹⁰ The Ocean Alliance (CMA CGM, COSCO, Evergreen, and OOCL) remains the largest, holding **35% market share**, despite a slight decline due to competitors' capacity expansions. The Premier Alliance (HMM, ONE, and Yang Ming) has maintained its market share, even after Hapag-Lloyd's departure, while the newly formed Gemini Cooperation (Maersk and Hapag-Lloyd) holds the smallest share (but will become the focus, as Maersk’s APM terminals post strong profits).¹¹

Port congestion slightly eased again this week, as some **2,55 million TEU** (around **8% of the global fleet**) is stuck in the system – down from **2,83 million** last week. Scheduling has finally settled, as the shipping season

⁸ Linerlytica. 10/02/2025. [Market Pulse – Week 7](#).

⁹ Alphaliner. 07/02/2025. [Despite ceasefire in Middle East, Suez Canal vessel traffic remains suppressed](#).

¹⁰ Murphy, A. 07/02/2025. [Shift in alliance market shares](#).

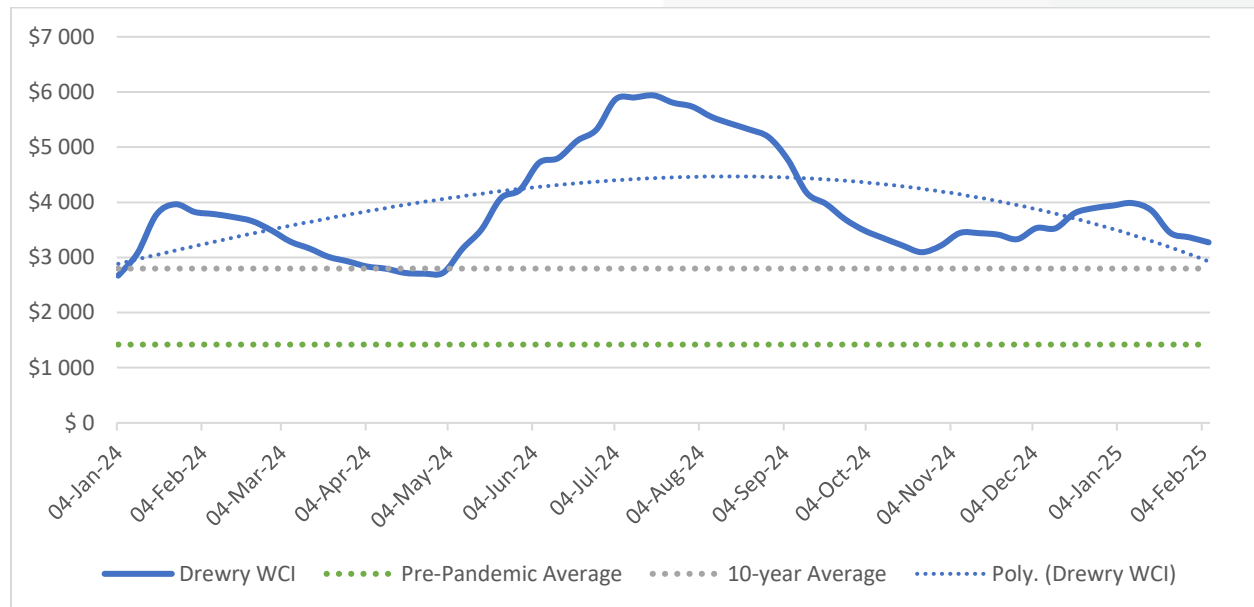
¹¹ Van Marle, G. 06/02/2025. [Gemini and logistics growth now the focus as APMM posts healthy profits](#).

is set to pick up after the LNY. Drewry’s “Cancelled Sailings Tracker” registered a much-reduced **7% cancellation rate** of Pro-forma scheduling (10 February to 9 March).¹²

iii. Global freight and contract rates

Global container spot rates have cooled again this week, as rates dropped by **↓2,7%** this week to **\$3 273 per 40-ft container**¹³, according to Drewry’s “World Container Index”. Spot rates are **↓14%** less than this time last year (but still **↑130%** above the average pre-pandemic level of **\$1 420** in 2019. The following illustration shows the changes since the start of last year:

Figure 19 – World Container Index (\$ per 40ft, index)



Source: Calculated from [Drewry](#)

Meanwhile, charter rates have remained stable (but still elevated), as the *Harper Petersen Index* (Harpex) traded around **2 058 points (↑88%, y/y)** on Friday. Indeed, the strength of the charter market is evident, as Maersk is paying **\$100 000 a day** to charter scarce post-panamax box ships.¹⁴

iv. Further developments of note

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

1. Panama Canal update amidst US pressure:

- Panama has decided not to renew its Belt and Road Initiative (BRI) agreement with China. It is considering cancelling a port concession with Hong Kong-based Hutchison Port Holdings due to US concerns over Chinese influence.¹⁵
- Additionally, President Jose Raul Mulino has tightened migration controls, positioning Panama as the US’s new southern border. However, he has resisted pressure to relinquish control of the Panama Canal.

2. Disappointing financial results for DSV amidst Schenker takeover:

- In 2024, DSV reported a 10% increase in annual revenue to Dkr167 billion (\$6 billion); however, gross profit declined, and net profit decreased by 18%.¹⁶

¹² Drewry. 07/02/2024. [Cancelled Sailings Tracker](#).

¹³ Drewry. 07/02/2025. [World Container Index](#).

¹⁴ Koo, A. 05/02/2025. [Maersk paying \\$100,000 a day to charter scarce post-panamax box ships](#).

¹⁵ Bartlett, C. 04/02/2025. [Panama gives in as US pressure on Panama Canal intensifies](#).

¹⁶ Lennane, A. 04/02/2025. [Disappointing results for DSV – and Schenker integration will impact revenue](#).

- b. The company attributed these declines to new EU reporting requirements and reduced shipment volumes due to customer de-stocking. Additionally, DSV anticipates that the integration of Schenker may lead to a temporary decrease in revenue during the transition period.

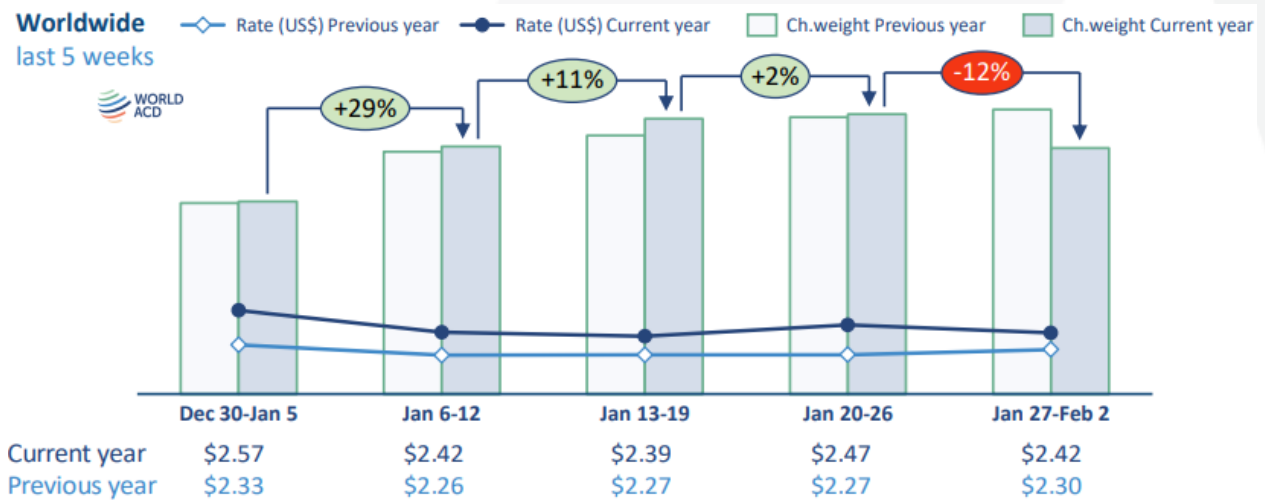
3. Hapag-Lloyd securing \$3,4bn of 'green finance' towards latest new builds:

- a. Hapag-Lloyd has secured **\$3,4 billion** in green financing to support its recent order of 24 LNG dual-fuel vessels, comprising twelve 16 800 TEU and twelve 9 200 TEU ships, scheduled for delivery between 2027 and 2029.¹⁷
- b. The financing package includes \$1,8 billion from three leasing structures, \$1,1 billion through a syndicated credit facility with the China Export & Credit Insurance Corporation (Sinasure), and \$500 million from two bilateral mortgage loans.
- c. These vessels are designed to be 'ammonia-ready' and capable of operating on bio-methane, aligning with Hapag-Lloyd's decarbonisation objectives.

b. Global air cargo industry

In the high-frequency metrics, global air cargo tonnages dropped by **↓12%** (w/w) in week 5 (27 January to 2 February), primarily due to a **↓33%** drop from Asia Pacific linked to LNY factory closures. Other regions saw increases, including Central and South America (**↑16%**) and Africa (**↑11%**), driven by Valentine’s Day flower shipments. Overall, tonnages were down **↓14%** year-on-year, with notable declines from Asia Pacific (**↓29%**), Europe (**↓7%**), and Middle East and South Asia (**↓5%**).

Figure 20 – Weight and rates by region (last 5 weeks, % change)



Source: [World ACD](#)

For January as a whole, global tonnages rose **↑2%** (y/y), with Asia Pacific (**↑3%**), North America (**↑5%**), and CSA (**↑2%**) contributing. The average global rate was **\$2,44 per kilogram**, up **↑7%** (y/y), with Asia Pacific (**↑10%**), Africa (also **↑10%**), and MESA (**↑33%**) seeing substantial increases. China-Europe and China-US tonnages fell significantly, but the full impact of Section 321 changes in the US-China e-commerce market is yet to be seen.

¹⁷ Bartlett, C. 06/02/2025. [Hapag-Lloyd secures \\$3.4bn of 'green finance' towards latest newbuilds.](#)

In other air cargo news, President Trump's recent executive orders have imposed additional tariffs on imports from China, Canada, and Mexico while also suspending the "de minimis" trade exemption for these countries, which previously allowed duty-free imports of goods valued under \$800.¹⁸ This move is expected to significantly impact e-commerce platforms like Shein and Temu, which relied on this exemption to offer low-cost products to US consumers.¹⁹

ENDS²⁰

¹⁸ Nishimura, K. 03/02/2025. [Trump Took on De Minimis. But Will It Stick?](#)

¹⁹ Lennane, A. 03/02/2025. [Airfreight expected to take a hit from de minimis exemption suspension.](#)

²⁰ **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.*