

Cargo Movement Update #223¹

Date: 2 March 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)	33 789	38 495	72 284	36 960	42 108	79 068	↓9%
Air Cargo (tons)	3 493	2 405	5 898	3 679	2 482	6 160	↓4%

Monthly Snapshot

Figure 1 – Cyclical⁴ monthly cargo volume, year on year (most metrics: Jan '24 vs Jan '25, % growth)

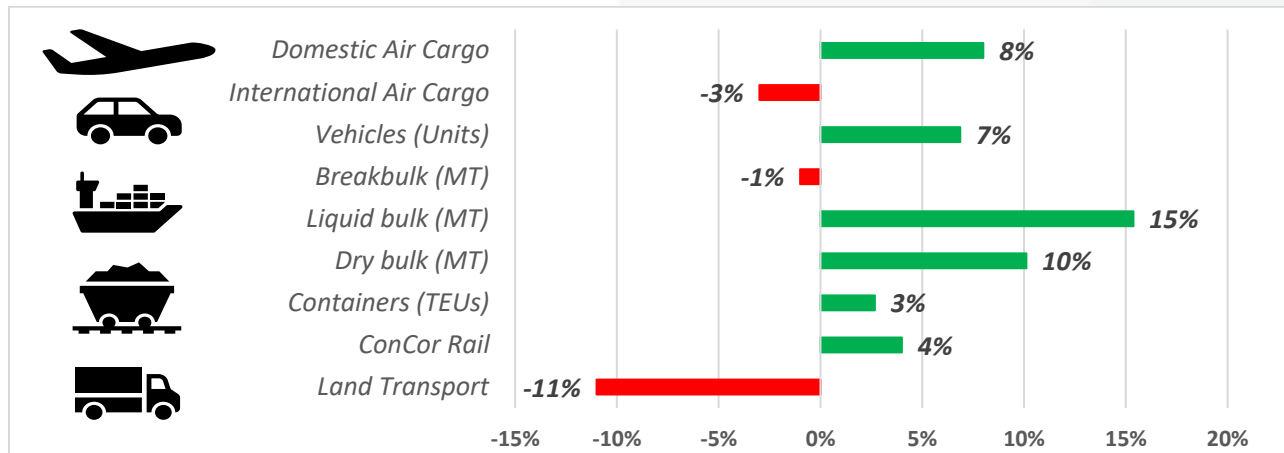
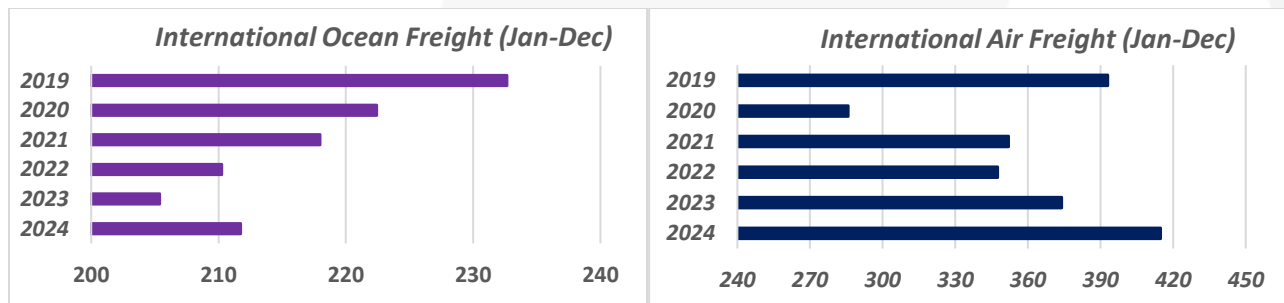


Figure 2 – Year-to-date flows 2019-2024⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~10 326 TEUs was handled per day, with ~12 123 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 2 607 containers, down **↓13%** from last week.
- SARS January trade stats – exports: **↓6,4%** (m/m); imports **↑14,1%**; trade deficit: **R16,4 billion**.
- Cross-border queue: **unchanged**; transit: **↑0,8 hrs**; SA borders: **11,4 hrs (unchanged)**; SADC: **6,0 hrs (↑20%)**.
- Schedule reliability remains between **50%-55%**; the average delay for late vessel arrivals is **~5,32 days**.
- Global spot rates dropped by **↓5,9%** (or \$166) to **\$2 629/40-ft** and are now below the 10-year average.
- IATA reports CTK up by **↑3,2%** (y/y) after air cargo grew (**↑3,1%**) for the 18th straight month in January.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 223rd 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 **10 326 TEUs** was handled per day, down from **11 295 TEUs** last week. Port operations were mainly characterised by adverse weather, vacant berths, as well as equipment breakdowns and shortages. Some excellent news concerns the fact that Durban commissioned the first batch of over 100 new cargo-handling machines in 2025, including 20 straddle carriers for Pier 2 and nine rubber-tyred gantry cranes for Pier 1. Unfortunately, the Port of Cape Town conceded more than 40 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 strong winds and heavy rain impacted operations at the Port of Richards Bay. CMA has announced that the APL Holland Coega call will be omitted due to adverse weather conditions and congestion at Cape Town. Additionally, load-shedding returned earlier this week and impacted operations at the Maydon Wharf terminal between Sunday (23 February) and Monday (24 February). Furthermore, towards the end of the week, rail operations on the line between Durban and Cato Ridge were delayed for around six hours due to intermittent overhead power failures.

Global schedule reliability remained stable between **50%-55%** into early 2025, with January recording **51,5%**, a **↓2,1%** (m/m) decline. Maersk led with **55%** reliability, while the gap between the most and least reliable carriers narrowed to **8,5%**. Port congestion remained stable at **2,83 million TEU (9% of global fleet)**. Container spot rates dropped again, with further declines expected. Despite a weakening freight market, charter rates remain high due to Red Sea diversions. Carriers aim to implement general rate increases (GRIs) in March to stabilise rates. Further developments include **(1)** labour developments – US & France, **(2)** a \$1,5 million fee on Chinese-built container ships entering US ports, and **(3)** eB/L a step closer with a standardised framework.

In the air cargo space, the daily average of air cargo handled at ORTIA in the previous week amounted to **499 006 kg** inbound (**↓5%**, w/w) and **343 519 kg** outbound (**↓3%**). Despite a second consecutive week of volume reduction, cargo is still slightly above the average levels of 2024 (**↑4%**, y/y) and roughly similar to the pre-pandemic levels of 2020 (**↑3%**). Internationally, air cargo tonnage is up **↑1%** (w/w), as the average air cargo rates edged up **↑2%** to **\$2,32/kg**, as air cargo tonnages from Asia Pacific origins have continued to rebound towards their pre-Lunar New Year levels, with rates edging back upwards and remaining above their level this time last year.

Cargo flows across the Lebombo Border Post and N4 Corridor have again been consistent this week, with truck volumes steady compared to last week at **1 351 HGVs per day** (**↓1%**, w/w). The average queue for the week was less than **3 km**, and an average border time of around **3,2 hours** per crossing. Rail to Maputo was steady at **six trains a day** on average in the last week. Sugar trains from Eswatini are constant at around **1,5 trains daily**, although the reporting has not been comprehensive.

For the rest of SADC borders, the average queue times were unchanged from last week, as the transit times increased by nearly **an hour**. The median border crossing times at South African borders were unchanged, averaging **~11,4 hrs** for the week. In contrast, the greater SADC region (excluding South African controlled) increased by approximately **an hour** from last week, averaging **~6,0 hrs** (**↑20%**). On average, three SADC border posts last week took more than a day to cross: Beitbridge, Groblersbrug, and Kasumbalesa (the worst affected, taking **almost three days to cross**). Other developments include **(1)** weather-related disruptions, **(2)** strikes and road closures, and **(3)** customs and border challenges.

There is growing optimism in the South African logistics sector as the addition of new port equipment and progress in rail reform provide momentum in improving throughput—particularly in the containerised industry. However, shifting geopolitical dynamics remain a concern, especially in relation to the US, where South Africa has traditionally enjoyed an average monthly trade surplus of **\$500 million**. The potential end of AGOA underscores the need for strategic trade diversification.

On the trade front, the year has started on a weaker note compared to 2023, with January recording a trade deficit of **R16,4 billion**—a significant decline from the **R3,7 billion deficit** in January 2024. This, combined with uncertainty surrounding the delayed budget, adds pressure to South Africa’s growth trajectory, where transport and logistics are pivotal.

Nevertheless, the past 18 months have shown that efforts to stabilise the logistics crisis are yielding results, demonstrating the sector’s resilience. A concerted effort is needed from the government, the private sector, and labour to sustain this progress. Their collaboration will be crucial in shaping a logistics network that addresses current inefficiencies and becomes a proper driver of economic growth and development.

Contents

Weekly Snapshot	1
Monthly Snapshot.....	1
Key Notes	1
Executive Summary.....	2
Contents.....	4
1. Ports Update	5
a. Container flow overview.....	5
b. Summary of port operations.....	7
i. Weather and other delays	7
ii. Cape Town.....	7
iii. Durban	8
iv. Richards Bay.....	10
v. Eastern Cape ports.....	11
vi. Transnet Freight Rail (TFR).....	11
vii. An update on the network statement and restructuring of TFR	12
viii. General.....	12
2. Air Update	13
a. International air cargo	13
b. Domestic air cargo	14
3. SARS Merchandise Trade Statistics: December.....	14
4. Road and Regional Update	14
a. Lebombo border post update	14
b. SADC cross-border and road freight delays	16
5. International Update	19
a. Global shipping industry	19
i. Global schedule reliably and container industry summary	19
ii. Global freight and contract rates.....	19
iii. Further developments of note.....	20
b. Global air cargo industry.....	21

1. Ports Update

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

a. Container flow overview

The following tables indicate the container flows reported for the last seven days. The reporting aligns with TPT's cycle, which runs from Mondays to Sundays.

Table 2 – Container Ports – Weekly flow reported for 24 February to 2 March (measured in TEUs)

7-day flow reported (24/02/2025 – 02/03/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 113	28 794	↑8%
New Pier (Pier 1)	1 507	10 548	↓21%
Cape Town Container Terminal	1 867	13 071	↑7%
Ngqura Container Terminal	1 545	10 812	↓39%
Port Elizabeth Container Terminal	125	878	↓20%
Other	1 169	8 181	↑2%
Total	10 326	72 284	↓9%

Source: Calculated from TPT, 2025. Updated 02/03/2025.

A decreased average of ~**10 326 TEUs (↓9%)** was handled per day for the last week (24 February to 2 March, Table 2), below the projected average of ~**11 593 TEUs (↓11% actual versus projected)**.

For the coming week, a slightly increased average of ~**11 381 TEUs (↑10%)** is predicted to be handled (3 to 9 March, Table 3). Adverse weather, vacant berths, equipment breakdowns, and shortages characterised port operations.

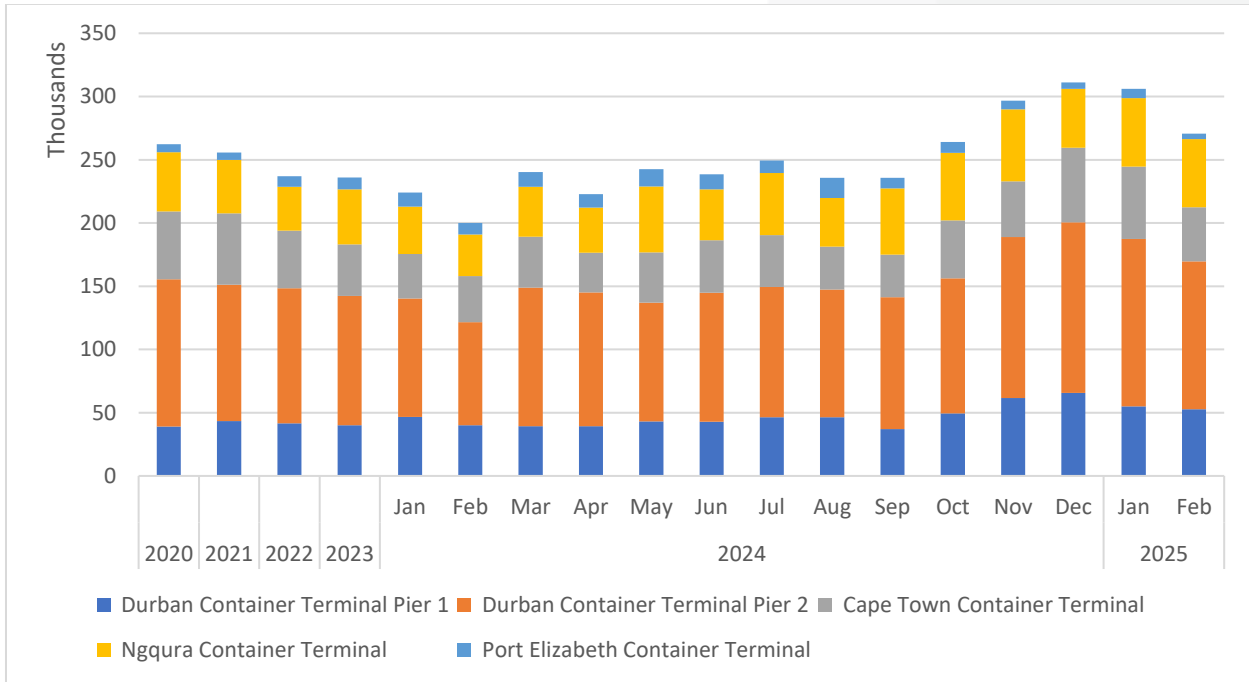
Table 3 – Container Ports – Weekly flow projected for 3 to 9 March (measured in TEUs)

7-day flow reported (03/03/2025 – 09/03/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 440	31 078	↑8%
New Pier (Pier 1)	1 641	11 490	↑9%
Cape Town Container Terminal	2 113	14 793	↑13%
Ngqura Container Terminal	1 989	13 922	↑29%
Port Elizabeth Container Terminal	272	1 907	↑117%
Other	925	6 474	↓62%
Total	11 381	79 665	↑10%

Source: Calculated from TPT, 2025. Updated 02/03/2025.

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.

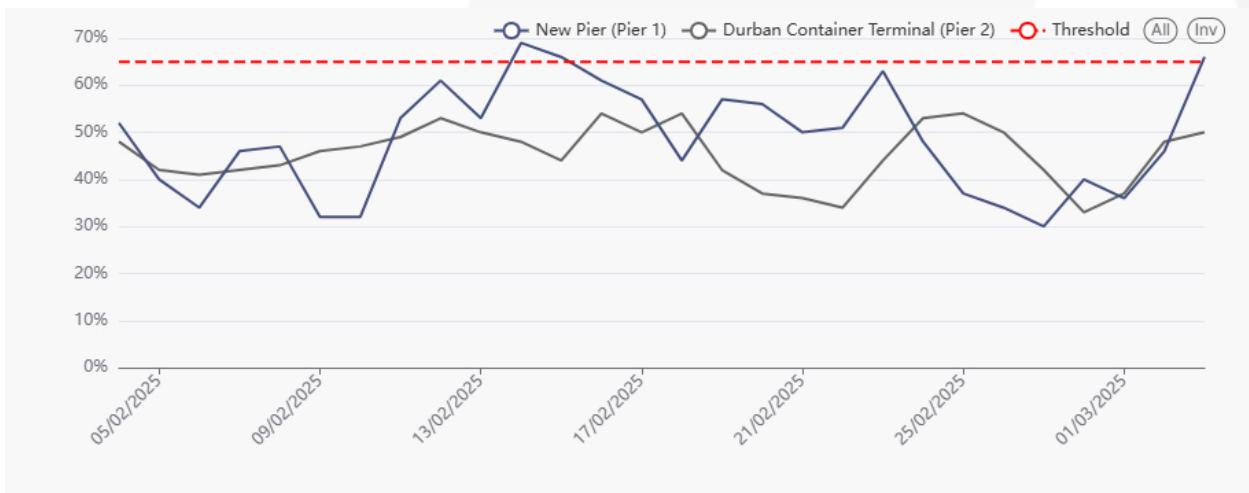
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 02/03/2025.

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

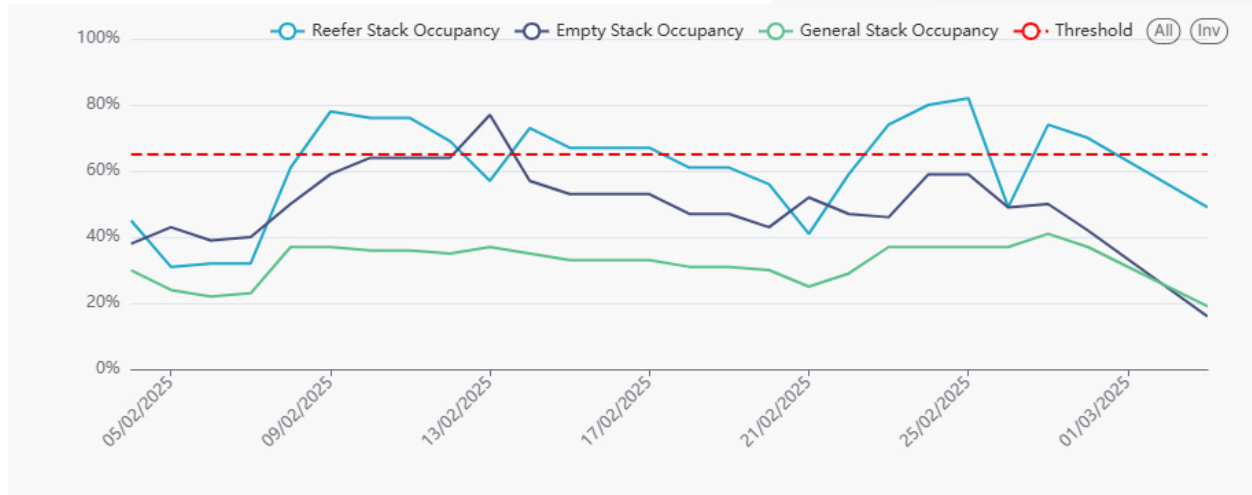
Figure 4 – Stack occupancy in DCT, general-purpose containers (5 February to present; a day on the day)



Source: Calculated using data from Transnet, 2025, and updated 02/03/2025.

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 (5 February to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 02/03/2025.

b. Summary of port operations

i. Weather and other delays

- The Port of Cape Town conceded more than 40 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.
- Strong winds and heavy rain impacted Port of Richards Bay operations.

ii. Cape Town

On Friday, CTCT recorded three vessels at berth and four at anchor, as strong winds proved to be the primary operational constraint. The Port of Cape Town remains on the first page of Linerlytica’s “Port Congestion Watch”, with a queue-to-berth ratio of **1,33**.⁶ On the landside, between Monday and Friday, the terminal managed to service 3 146 trucks while handling approximately 208 rail units. On the waterside, the terminal executed approximately 6 003 container moves across the quay during the same period. During the week, the terminal conceded more than 40 operational hours to adverse weather. Stack occupancy for **GP containers was recorded at 37%, reefers at 70%, and empties at 42%**. Additionally, the terminal operated with **eight STS cranes, 22 RTGs, and 60 hauliers** towards the end of the week. The latest reports suggest that Crane LC6 is currently out of commission, with no ETR available yet.

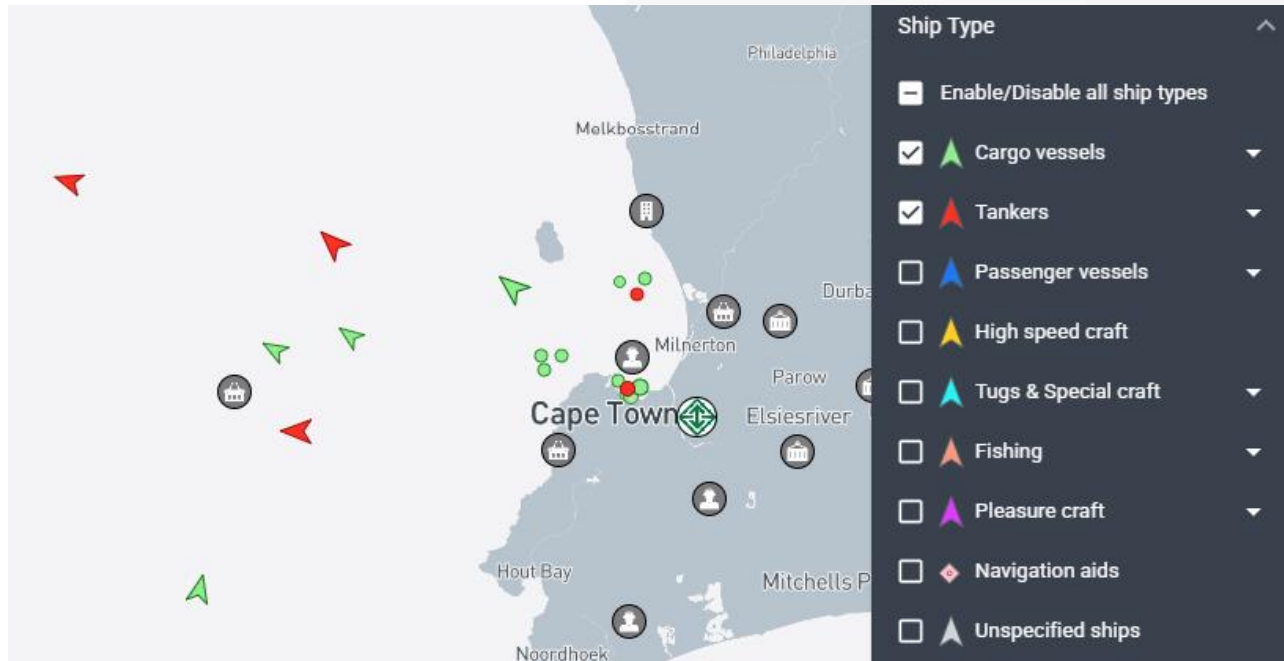
On Friday, CTMPT recorded two vessels at berth and one at outer anchorage. In the preceding 24 hours, the terminal managed to handle 198 container moves and 6 581 tons of cargo across the quay on the waterside. On the landside, 297 trucks were processed during the same period. Stack occupancy was recorded at 48% for general cargo, 28% for reefers, and 50% for empties. Towards the end of the week, the terminal operated with three cranes and four straddle carriers.

⁶ Linerlytica. 02/03/2025. [Port Congestion Watch](#).

Between 17 and 23 February, the FPT terminal handled ten vessels: five multi-cargo, three dry bulk, one container vessel, and one vessel containing steel. Berth occupancy during this period was recorded at 65%. The terminal planned to handle eight more vessels between 24 February and 2 March, with another seven vessels scheduled between 3 and 9 March. The late arrival of cargo and adverse weather conditions ensured operational constraints during this period.

The latest reports from Maersk suggest that the MSC Resilient III 508N will complete a split call in Cape Town to alleviate the delay currently seen at CTCT due to adverse weather. The vessel arrived in Durban around 25 February. Upon completion of her operations, she is anticipated to arrive in Cape Town early in March, where she will discharge cargo at the FPT terminal. She will then load cargo at CTCT around 12 March before sailing.

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



Source: Marine Traffic. Updated 02/03/2025 at 14:00.

iii. Durban

Durban commissioned the first batch of over 100 new cargo-handling machines in 2025, including 20 straddle carriers for Pier 2 and nine rubber-tyred gantry cranes for Pier 1, to enhance operational efficiency. This **R892 million investment** is part of a more considerable **R3,4 billion equipment** upgrade across South African ports.

The Port helicopter made a welcome return to operations this week; however, the port is still challenged by a crew shortage for most of the crafts. The floating crane also went out of commission towards the end of the week. Additionally, load-shedding returned earlier this week and impacted operations at the Maydon Wharf terminal between Sunday (23 February) and Monday (24 February).

On Friday, Pier 1 recorded one vessel on berth, operated by three gangs, with one vessel at anchor. Stack occupancy was **40% for GP containers**. Between Monday and Friday, the terminal executed approximately 4 410 gate moves and 77 rail moves on the landside. The **average TTT** for the week was **~73 minutes (↓24%, w/w)** and an average **staging time** of **~50 minutes (↓50%)**. Additionally, the terminal moved over 5 100

TEUs across the quay on the waterside during the same period. The terminal operated with **four STS cranes** and **13 RTGs** towards the end of the week. The terminal experienced some operational delays due to inclement weather conditions and equipment breakdowns towards the end of the week.

Pier 2 had four vessels on berth and three at anchorage on Friday, as adverse weather and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **33% for GP containers**. The terminal operated with **ten gangs** and moved over 13 300 containers across the quay between Monday and Friday on the waterside. Approximately 9 886 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT of ~76 minutes (↑21%, w/w)** and another low staging time of **~64 minutes (↑60%)**. Approximately 1 741 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **55** and **59** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **65%** during this period. Towards the end of the week, the most notable crane absentees were Cranes 520, 523, 525, 529, and 532. Cranes 525 and 532 were expected to return to service before the weekend, while no ETR is available for Cranes 520, 523, or 529 yet.

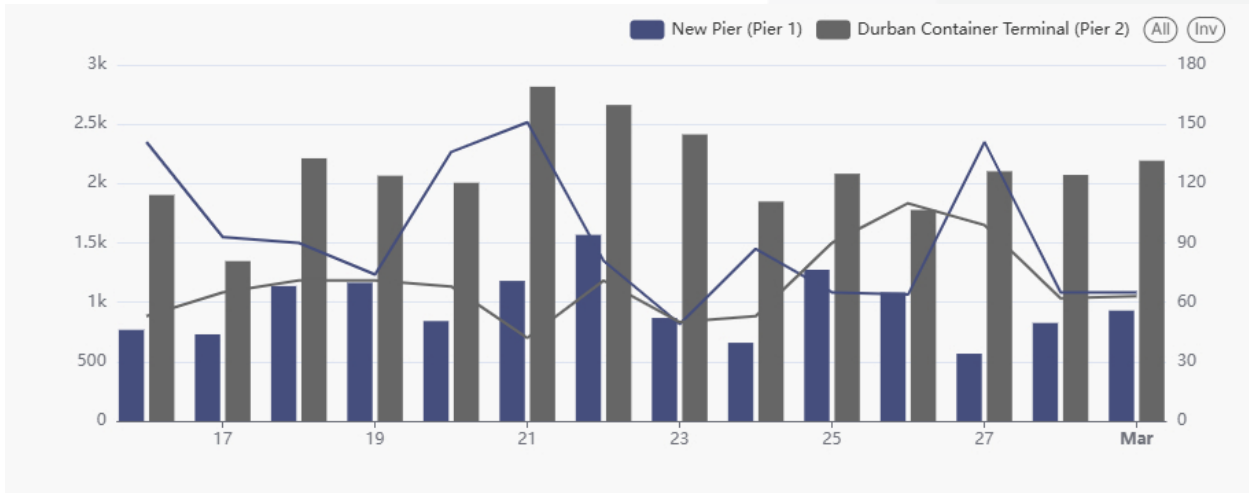
Durban's MPT terminal recorded zero vessels at berth on Thursday and none at outer anchorage. Stack occupancy for containers was 20%, with the breakbulk stack around 5%. In the preceding 24 hours, the terminal handled 383 containers and zero tons of breakbulk on the waterside. On the landside, 549 container trucks and five breakbulk RMTs were serviced. During this period, three cranes, seven reach stackers, seven forklifts, and 16 ERFs were in operation.

On Wednesday, the Maydon Wharf MPT recorded one vessel at berth but zero at anchor. On the waterside, 4 518 tons were handled across the quay in the 24 hours leading to Thursday. On the landside, 23 trucks were handled during the same period, containing approximately 821 tons. No waterside nor landside volumes were handled at the agri-bulk facility this week, with the next vessel expected to arrive around 04 March.

On Tuesday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with none at anchorage. In the 24 hours before, the terminal handled 1 843 road and 266 rail units on the landside while handling 2 947 units on the waterside. Overall stack occupancy was 84%, 70% at Q&R, and 30% at G-berth. During this period, the terminal had 151 high-and-heavy (abnormal loads) on hand and managed to handle 57.

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.

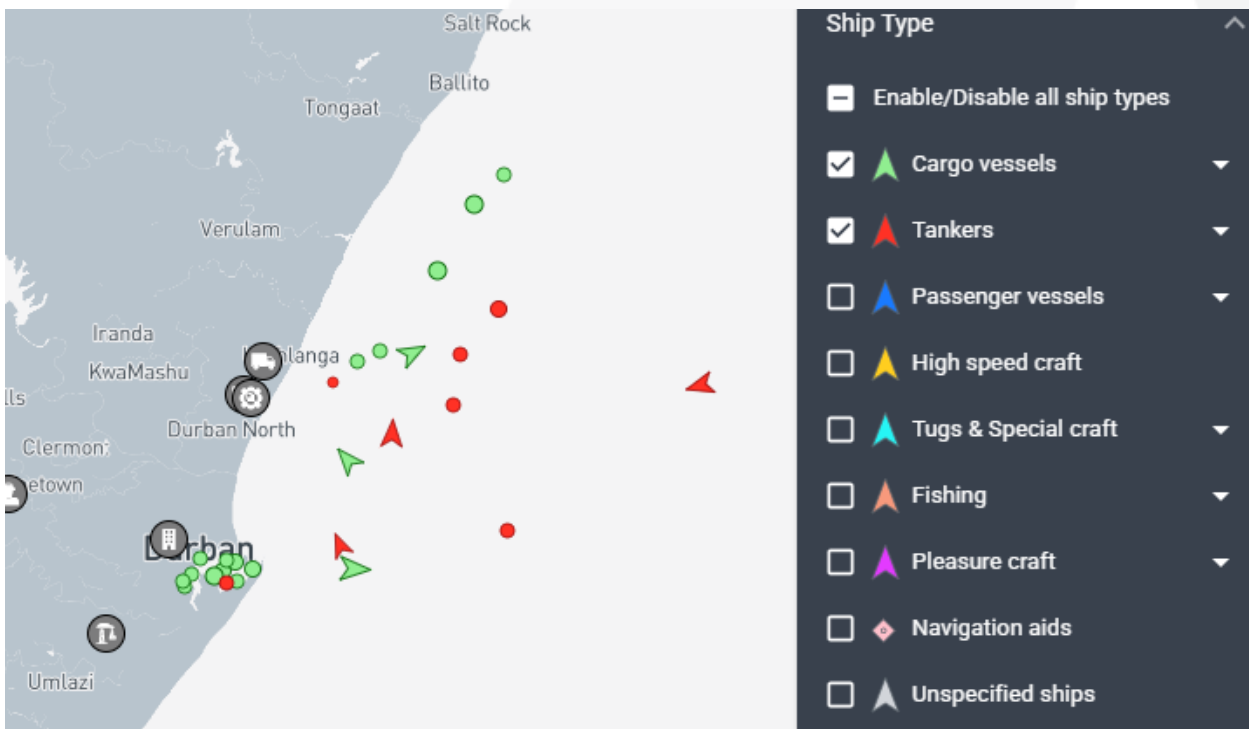
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 02/03/2025.

The queue of container vessels waiting outside Durban remains relatively low. On Monday evening (3 March), **one** container vessel was waiting for Pier 1, **zero** for Pier 2, and **one** for Point. Several dry, liquid, and breakbulk vessels remain in the queue, as evidenced by the snapshot:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 02/03/2025 at 14:00.

iv. Richards Bay

On Friday, Richards Bay had 18 vessels at anchor and 14 on the berth, translating to five vessels at DBT, five at MPT, four at RBCT, and none at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources towards the end of the week. The terminal experienced some operational

difficulties this week due to adverse weather conditions. The daily average for the week increased significantly to around **171 000 tons** (**↑24%**, w/w). An average of **23 trains** (up by two from last week) were serviced on the landside and above the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded zero vessels on berth and one at anchor, with one 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 14% for reefers, 33% for reefer ground slots, and 15% for the general stack. Despite being windbound for over nine hours, the terminal handled approximately 456 TEUs and 35 reefers on the waterside. Approximately 393 trucks were processed on the landside at a TTT of ~26 minutes. Additionally, the terminal had two vacant berths for around 21 hours during this period.

On Friday, GCT had zero vessels at berth and one at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the preceding 24 hours. During this period, 214 trucks were processed at a TTT of ~16 minutes on the landside, while 464 TEUs and two reefers were handled across the quay on the waterside. Stack occupancy was recorded at 13% for the general stack, 14% for reefers, and 33% for reefer ground slots. The terminal experienced some operational constraints, such as adverse weather conditions and vacant berths.

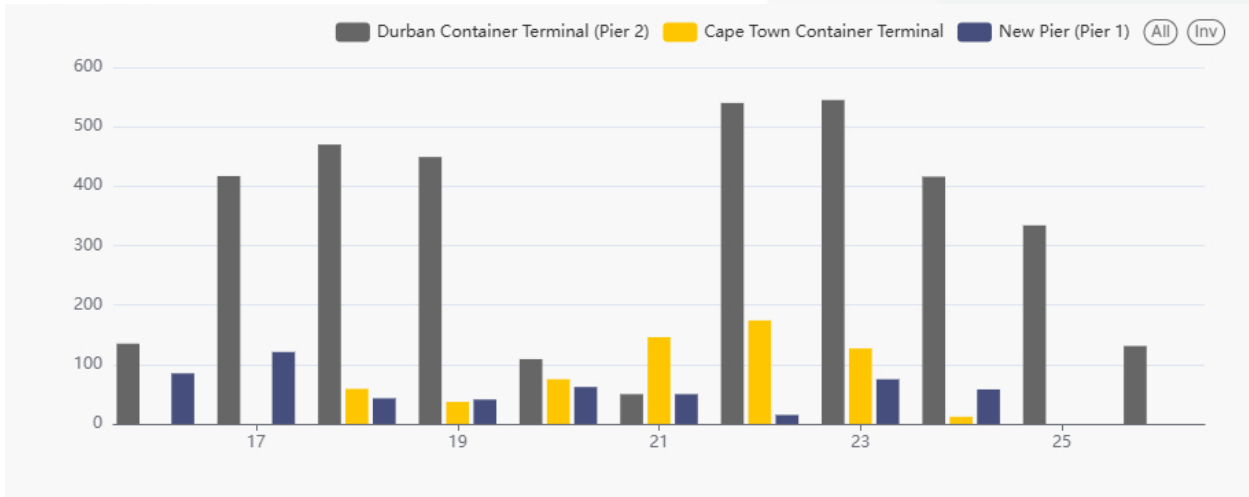
The Santa Rita/250S is facing significant delays in Europe, mainly due to the strike/Go-Slow action in Rotterdam, causing major congestion. Thus, she is running late into South Africa and is anticipated to arrive in Port Elizabeth on 16 March.

The latest reports suggest that CMA has announced that the APL Holland Coega call will be omitted due to adverse weather conditions and congestion at Cape Town. As a result, all imports will be discharged in Cape Town and planned on the following vessel to the destination, while all exports will be loaded on the following MW1 vessel.

vi. Transnet Freight Rail (TFR)

Crane breakdowns severely impacted rail operations on the ConCor line between Tuesday and Wednesday, while heavy rain also impacted rail operations out of Durban. Towards the end of the week, rail operations on the line between Durban and Cato Ridge were delayed for around six hours due to intermittent overhead power failures. Additionally, towards the end of the week, DCT Pier 2 had 464 ConCor units on hand with a dwell time of 72 hours and 415 over-border units with a dwell time of 59 days.

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



Source: Calculated using data from Transnet, 2024. Updated 02/03/2025.

In the last week (24 February to 2 March), rail cargo out of Durban was reported at **2 607** containers, down **↓13%** from the previous week’s **2 987** containers.

vii. An update on the network statement and restructuring of TFR

The finalisation of Transnet’s Network Statement, published on 20 December 2024, marks a pivotal step in restructuring the rail sector, allowing private train operator companies (TOCs) to access the rail network under the Economic Regulation of Transport Act (ERT Act), with oversight by the Transport Economic Regulator.⁷ A revised tiered access tariff structure has been introduced, making rail access more affordable, though concerns remain over infrastructure quality, security risks, and investor confidence. TOCs must undergo a formal application and bidding process, obtain a *License to Operate* and adhere to stringent regulatory and safety requirements. While operations are set to commence on 1 April, delays are expected due to maintenance backlogs and unresolved technical and commercial challenges that require further industry engagement.

viii. General

The latest reports from Maersk suggest that despite the persistence of the Cape Town southeasterly wind, the much-improved operational environment in South Africa continues. CTCT and CTMPT seemingly have 6-8 days waiting time, with this number expected to increase. Waiting times at all other terminals are between 0 and 1 day. Additionally, the same reports suggest that the political situation in Mozambique has eased, with Beira and Maputo’s waiting times retracting. The shipping line remains cautious about cyclone Garance affecting the Reunion and Mauritius islands.

⁷ Chaplin, V. & Wesson, G. 02/03/2025. [Pivotal reform in Transnet’s final Network Statement.](#)

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 17 February. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in February 2024 averaged ~810 675 kg daily.

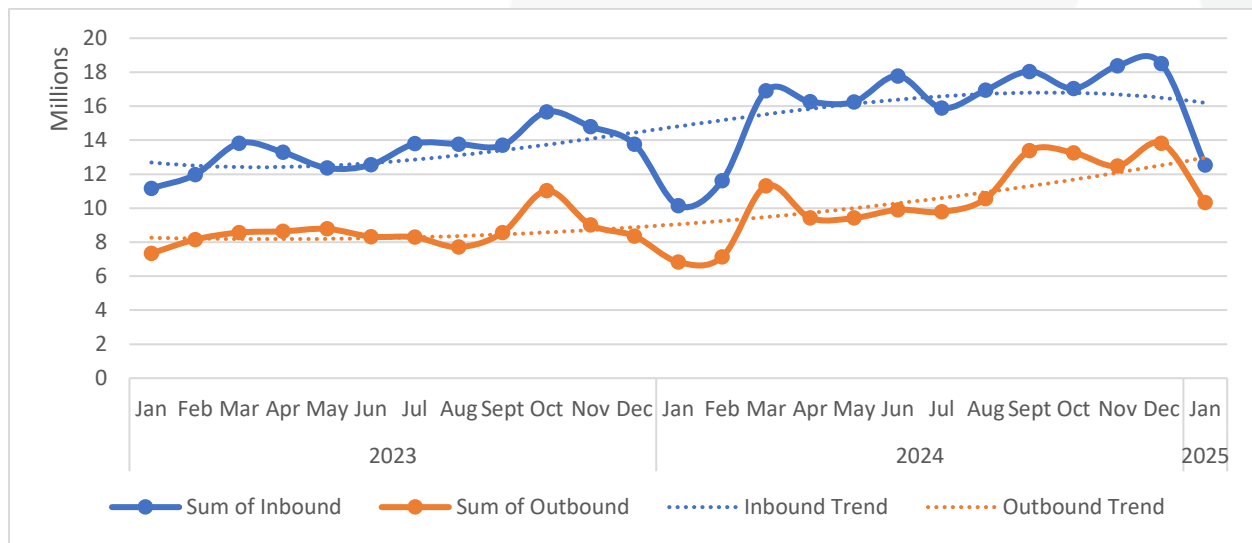
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	17-Feb	18-Feb	19-Feb	20-Feb	21-Feb	22-Feb	23-Feb	Week
Volume inbound	410 504	196 794	379 911	149 142	343 718	255 517	1 757 455	3 493 041
Volume outbound	122 514	143 812	248 899	178 629	214 900	179 789	1 316 089	2 404 632
Total	533 018	340 606	628 810	327 771	558 618	435 306	3 073 544	5 897 673

Courtesy of ACOC. Updated: 02/03/2025.

In the air cargo space, the daily average of air cargo handled at ORTIA in the previous week amounted to **499 006 kg** inbound (↓5%, w/w) and **343 519 kg** outbound (↓3%). Despite a second consecutive week of volume reduction, cargo is still slightly above the average levels of 2024 (↑4%, y/y) and roughly similar to the pre-pandemic levels of 2020 (↑3%). 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)

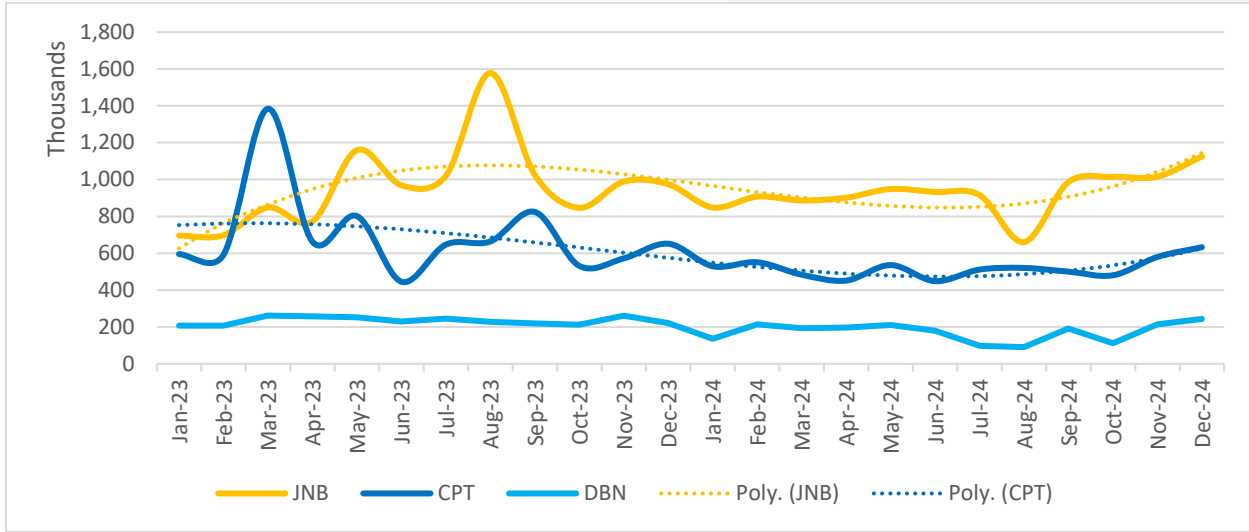


Calculated from ACOC. Updated: 02/03/2025.

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: 02/03/2025.

3. SARS Merchandise Trade Statistics: January

SARS released its latest "Merchandise Trade Statistics" for January⁸, revealing a preliminary monthly trade deficit of **R16,4 billion**. Monthly trade data indicates that exports decreased by **↓6,4%** from December (m/m) to **R149,0 billion**, while imports increased by **↑14,4%** (m/m) to **R165,4 billion**. The trade deficit is a deterioration from the **R3,7 billion deficit** recorded in January 2024. On an annual basis, export flows for January 2025 were **↑1,2%** (y/y) higher than in January 2024, while import flows were significantly higher by **↑9,6%**.

Regionally, trade with BELN countries for January resulted in a trade surplus of **R10,3 billion**, derived from exports of **R16,1 billion** and imports of **R5,7 billion**. Exports to our neighbouring countries increased by **↑3,2%** (m/m) between December 2024 and January 2025, while imports rose by **↑8,4%** (m/m) over the same period. Cumulative figures for the year demonstrate a positive trade balance with BELN countries, increasing from **R9,1 billion** in 2024 to **R10,3 billion** in 2025. Excluding BELN countries, South Africa's trade balance with all other trading partners recorded a net deficit of **R26,8 billion**.

4. Road and Regional Update

a. Lebombo border post update

As of the week spanning 24 February to 2 March, cargo flows relatively unabated across the N4 corridor, with only minor issues reported. The following notes summarise the recent developments:

- Truck volumes are steady compared to last week at **1 351 HGVs per day (↓1%, w/w)**, with an average queue of less than **3 km** and an average border time of around **3,2 hours** per crossing.
- Rail to Maputo was steady at **six trains a day** on average in the last week.

⁸ SARS. 28/02/2025. [Trade Statistics: January 2025](#).

- Sugar trains from Eswatini have decreased to around **1,5 trains a day** (although the reporting has not been comprehensive).

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

Table 5 – Lebombo border post update

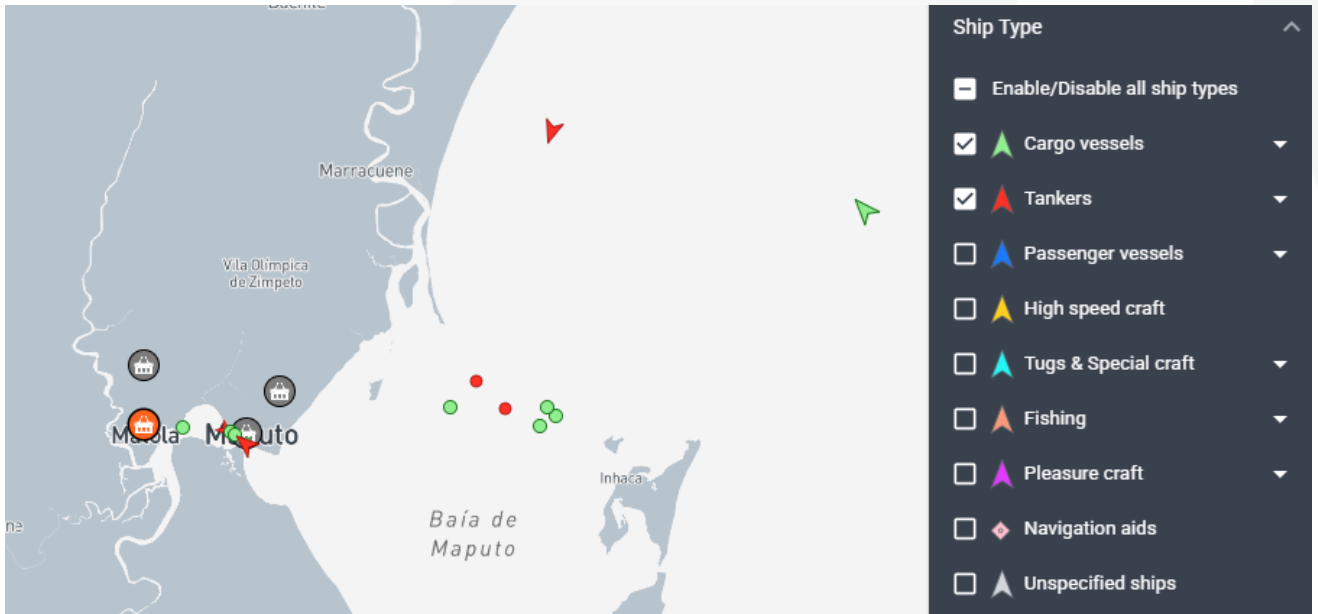
Date 06h00 Daily	Total Trucks Entering KM4	Total Trucks Exit KM4	Mineral Trucks	General Cargo (incl. critical supplies)	Micro Importers (Informal Traders)	Export (full)	Fuel Tankers	Empty Minerals	Total Trucks inside KM4 staging	Total Trains	SA to Maputo	KM4 to Maputo	Eswatini to Maputo	
Design Capacity	1 500	1 500	1 200	200	n/a	50	50	No delays	2 000	20	10	6	4	
24-Feb-25	1 071	1 027	898	71	17	28	13		208	0	*	*	*	
25-Feb-25	1 154	1 137	868	165	43	33	28		231	2	*	1	1	
26-Feb-25	1 338	1 267	865	253	54	45	50		254	5	5	0	0	
27-Feb-25	1 509	1 426	979	294	56	48	49		293	9	6	*	3	
28-Feb-25	1 585	1 340	925	229	65	59	62		311	10	7	1	2	
01-Mar-25	1 338	1 336	888	226	44	69	109		228	0	*	*	*	
02-Mar-25	1 464	1 253	923	175	56	37	62		240	0	*	*	*	
% of design capacity	90%	84%	76%	101%	n/a	91%	107%			13%	19%	60%	11%	38%
% change (d/d)	9%	-6%	4%	-23%	27%	-46%	-43%			15%				

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 02/03/2025.

* = not reported

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 02/03/2025 at 14:00.

b. SADC cross-border and road freight delays

This week, the following challenges and delays affecting roads in South Africa and the broader SADC region:

- The average queue times were unchanged from last week, as the transit times increased by nearly **an hour**.
- The median border crossing times at South African borders were unchanged, averaging **~11,4 hrs** for the week.
- In contrast, the greater SADC region (excluding South African controlled) increased by approximately **an hour** from last week, averaging **~6,0 hrs (↑20%)**.

1. Weather-related disruptions:

- The Tlokweng – Zeerust road has been closed due to heavy rains.
- Groblersbrug is at risk of further flooding, as heavy rains have been reported approximately 60 km upstream.
- As a precaution, Groblersbrug/Martin's Drift operations have been suspended until further notice.

2. Strikes and road closures:

- A protest occurred on the N5 and the N4 between Zeerust and Mahikeng due to water and electricity shortages, leading to road closures.
- Transporters were advised to reroute through Lichtenburg as authorities worked to clear the area.
- Additional disruptions have been reported this morning, with burning tyres blocking the R503 and the Mahikeng/Zeerust extension on the R49.

3. Customs and border challenges:

- Transporters have raised complaints about ZIMRA enforcing the requirement for a Physical Examination (PE) for transit vehicles.
- There have been reports of delays at Condep, with allegations that seals are only being fitted upon payment of an informal charge.
- A meeting with customs, immigration, clearing agents, and drivers confirmed that all drivers stranded on the South African side can proceed via alternative ports of entry without document amendments.
- Access to the Groblersbrug compound and bridge is strictly prohibited, with only the Border Management Authority (BMA) and relevant authorities allowed access.

The following table shows the changes in bidirectional flows through South African and SADC borders:

Table 6 – 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	429	26,7	7,1	25,0	12 870	3 003
Beitbridge	Zimbabwe-SA	417	9,2	1,6	9,4	12 510	2 919
Groblersbrug	SA-Botswana	231	19,2	4,2	27,0	6 930	1 617
Martins Drift	Botswana-SA	205	2,6	0,4	2,1	6 150	1 435
Kopfontein	SA-Botswana	200	7,8	2,1	10,6	6 000	1 400
Tlokweng	Botswana-SA	24	0,8	0,2	0,4	720	168
Vioolsdrift	SA-Namibia	30	5,8	1,3	3,3	900	210
Noordoewer	Namibia-SA	20	1,8	0,4	1,5	600	20
Nakop	SA-Namibia	30	4,8	1,1	4,5	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,4	1,1	600	140
Skilpadshek	SA-Botswana	251	12,5	1,6	6,0	7 530	1 757
Pioneer Gate	Botswana-SA	60	0,0	0,0	0,0	1 800	420
Lebombo	SA-Mozambique	1 358	3,8	0,3	3,2	40 740	9 506
Ressano Garcia	Mozambique-SA	1 265	2,2	0,2	1,3	37 950	8 855
Sum/Average		4 540	7,0	1,5	6,8	136 200	31 780

Source: TLC, FESARTA, & Crickmay, week ending 23/02/2025.

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	9,4	1,3	8,7	9 600	2 240
Central Corridor	798	1,8	0,3	1,1	23 940	5 586
Dar Es Salaam Corridor	1 819	14,3	2,2	17,7	54 570	12 733
Maputo Corridor	2 623	3,0	0,3	2,2	78 690	18 361
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 578	10,4	1,9	12,7	107 340	25 046
Northern Corridor	2 817	1,1	0,1	1,2	92 520	21 588
Trans Caprivi Corridor	116	5,8	1,8	19,3	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	341	4,2	0,6	2,6	10 230	2 387
Trans Oranje Corridor	100	3,4	0,8	2,6	3 000	700
Sum/Average	12 739	5,5	0,9	6,5	390 180	91 042

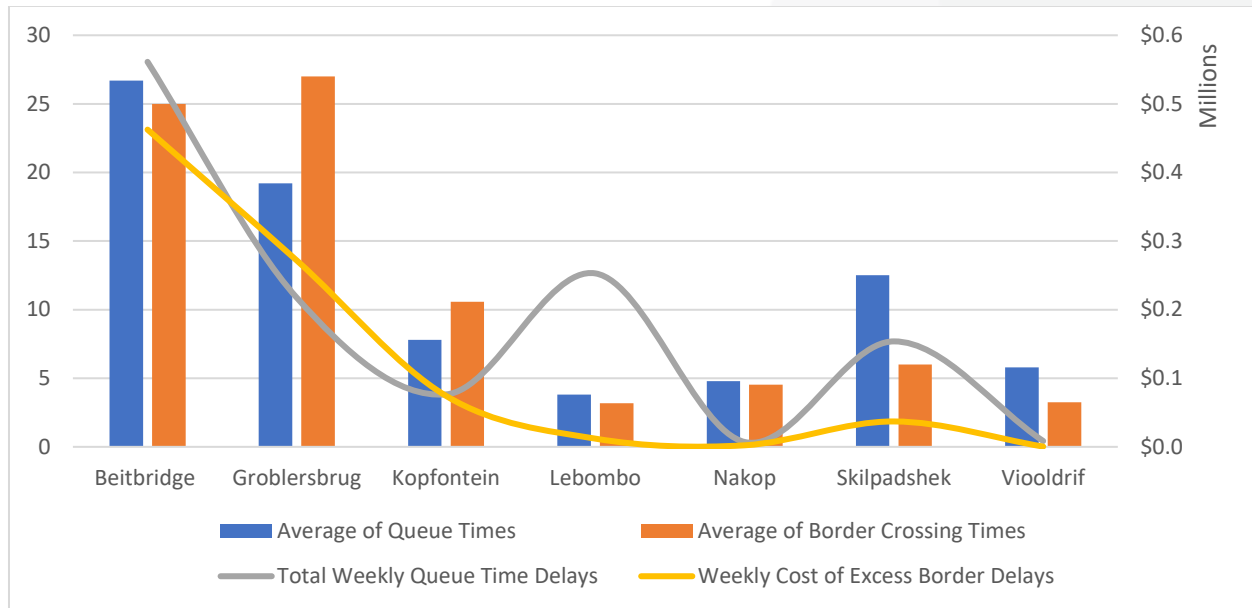
Source: TLC, FESARTA, & Crickmay, week ending 23/02/2025.

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

⁹ Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.

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

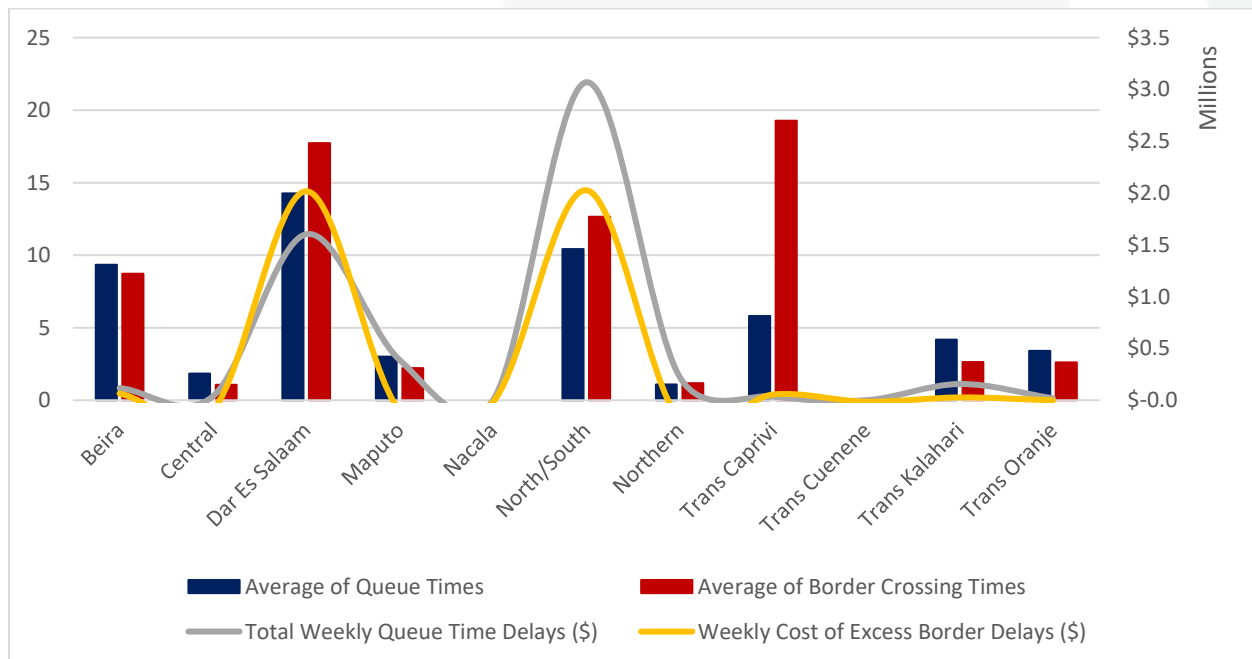
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 23/02/2025.

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 23/02/2025.

In summary, cross-border queue time averaged **~5,5 hours** (unchanged from the previous week's **~5,5 hours**), indirectly costing the transport industry an estimated **\$5,7 million (R104 million)**. Furthermore, the week's average cross-border transit times hovered around **~6,5 hours** (up by **~0,8 hours** from the **~5,7 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$3,8 million (R69 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$9,4 million (R173 million)**, up by **~R6 million** or **↑3,6%** from **~R167 million** in the previous report).

5. International Update

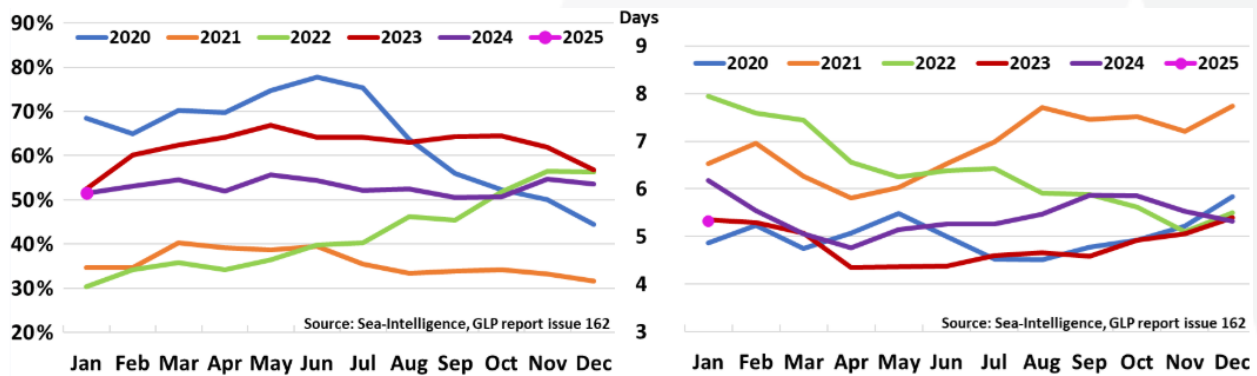
The following section provides some context around the global economy and its impact on trade, mainly an update on (a) the global shipping industry and (b) the global aviation industry.

a. Global shipping industry

i. Global schedule reliably and container industry summary

According to *Sea-Intelligence's* Global Liner Performance (GLP) report, global schedule reliability remained relatively stable, fluctuating within the **50%-55% range**¹¹ throughout 2024 and into early 2025. In January, reliability stood at 51,5%, mirroring the figure from January 2024 but reflecting a **↓2,1% (m/m)** decline to December 2024. The average delay for late vessel arrivals improved slightly, decreasing by **0,01** to **5,32 days**—the lowest since July 2024 and lower than the figures recorded during the pandemic-impacted years. Among the top 13 carriers, Maersk achieved the highest schedule reliability at **55%**, followed by six carriers with reliability over **50%**. The remaining six carriers were within the **46%-50% range**, with Yang Ming and OOCL at the bottom with **46,6%**:

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



Source: [Sea Intelligence](#)

Notably, the difference between the most and least reliable carriers narrowed to under **8,5%**—the smallest gap since March 2017. Only four of the top 13 carriers recorded a month-on-month improvement, with Wan Hai experiencing the largest increase of **↑3,7%**. Seven carriers recorded improvements year-on-year, with Maersk showing the most significant growth of **↑10,9%**. Despite the developments in schedule reliability this week, Drewry's "*Cancelled Sailings Tracker*" has steadily trended around a **6% cancellation rate** of Pro-forma scheduling (3 March to 6 April).¹²

Port congestion is stable this week, as some **2,83 million TEU** (around **9% of the global fleet**) are stuck in the system.

ii. Global freight and contract rates

Global container spot rates have continued plummeting as Drewry's "*World Container Index*" dropped another **\$166** to last week's **\$300** and now trades at around **\$2 629 per 40-ft container**¹³. The drop corresponds to **↓5,9%** this week, which is a far cry from the start of the year when rates traded around **\$4 000/40ft**. Two of the major East-West trades registered double-digit weekly changes, as Drewry expects rates to continue decreasing next week due to increased shipping capacity. Nevertheless, carriers maintain

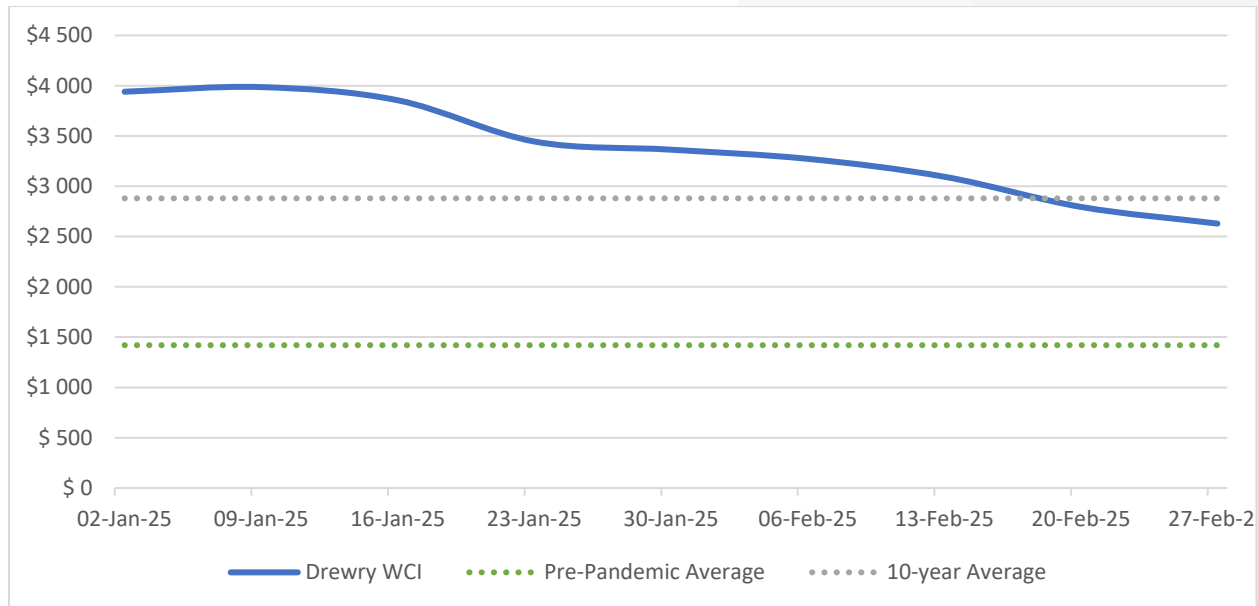
¹¹ Murphy, A. 26/02/2025. [2024 global schedule reliability trend continuing in 2025](#).

¹² Drewry. 28/02/2024. [Cancelled Sailings Tracker](#).

¹³ Drewry. 27/02/2025. [World Container Index](#).

an optimistic outlook, aiming to implement general rate increases (GRIs) in March to stabilise rates.¹⁴ The following figure shows the drastic reduction in spot rates since the start of the year:

Figure 16 – World Container Index (\$ per 40ft, YTD)



Source: Calculated from [Drewry](#)

Charter rates remain elevated, as the *Harper Petersen Index* (Harpex) traded around **2 070 points** (**↑74%**, y/y) on Friday. Although charter and freight rates tend to move in tandem, there have been various periods in the past where they have diverged due to differences in demand and supply dynamics in the charter and freight markets. The Red Sea diversions have driven the widening divergence in the two indices since the beginning of 2024. However, this could soon be reversed as carriers curb their appetite for additional ships amidst a weakening freight market.¹⁵

iii. Further developments of note

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

1. Labour developments – US & France:

- a. On 26 February, the International Longshoremen's Association (ILA), representing over 45 000 dockworkers across the US East and Gulf Coasts, ratified a new six-year contract with the United States Maritime Alliance (USMX).¹⁶
- b. This agreement, effective from October 1, 2024, to September 30, 2030, includes a massive **↑62% wage increase**, raising the hourly base rate from \$39 to \$63. It also addresses concerns over automation by safeguarding workers from increased automation threats.

¹⁴ Van Marle, G. 28/02/2025. [Carriers put on a brave face amid further decline in ocean spot rates.](#)

¹⁵ Linerlytica. 03/03/2025. [Market Pulse – Week 9.](#)

¹⁶ Parmar, A. 27/02/2025. [US East and Gulf Coast dockworkers ratify new six-year contract.](#)

- c. The contract received a 99% approval vote from union members and is scheduled to be formally signed on 11 March. This ratification averts potential strikes and ensures labour peace at 36 major ports, including New York and New Jersey, vital for over half US imports.
- d. Elsewhere, labour unions at France's major ports, including Le Havre and Marseille, announced the continuation of intermittent industrial actions throughout March 2025 in protest against state pension reforms.
- e. On 27 February, a 24-hour walkout took place, and unions have called for a 72-hour strike between March 18 and 20, along with four-hour stoppages on other days. These strikes are expected to disrupt operations at key maritime gateways, affecting both container traffic and rail freight services.¹⁷

2. \$1,5 million fee on Chinese-built container ships entering US ports:

- a. The US Trade Representative has proposed imposing fees of up to **\$1,5 million** on Chinese-built container ships entering US ports, aiming to counter China's dominance in global shipbuilding and bolster the US shipbuilding industry.¹⁸
- b. This measure could significantly increase ocean carrier operating costs, leading to higher freight rates for US importers and exporters and potentially causing a resurgence of port congestion as carriers adjust operations to mitigate these charges.¹⁹
- c. The proposal has raised concerns about its impact on consumer prices and the competitiveness of US exports.

3. Electronic bills of lading a step closer with a standardised framework:

- a. The Digital Container Shipping Association (DCSA) has finalised standardised frameworks for digitised bookings (Booking 2.0) and bills of lading (Bill of Lading 3.0), aiming to accelerate the adoption of electronic bills of lading (eB/Ls) and promote interconnected trade.²⁰
- b. These standards address the standardisation challenge by preventing any single platform provider from becoming a gatekeeper for the technology.

b. Global air cargo industry

IATA released their latest *"Air Cargo Market Analysis"* for January, indicating that global cargo tonne-kilometres (CTK) grew by **↑3,2%** (y/y), marking the 18th consecutive month of growth. Seasonally adjusted, demand increased by **↑3,1%** (m/m). However, growth slowed compared to 2024's double-digit increases:

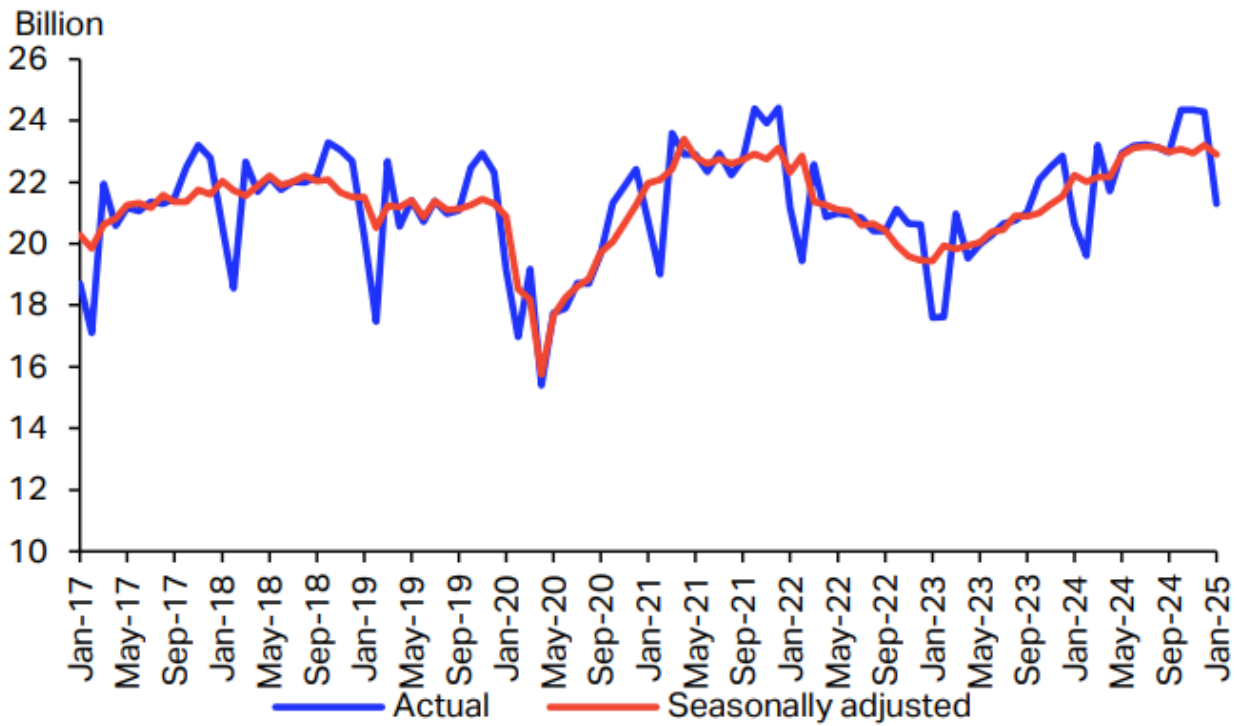
¹⁷ Todd, S. 27/02/2025. [Business calls for end to French port strikes, but unions plan more.](#)

¹⁸ Van Marle, G. 24/02/2025. [Up to \\$1.5m fee for every Chinese-built box ship calling at a US port.](#)

¹⁹ Berger, P. 26/02/2025. [How Charging Chinese Ships Could Ripple Through the Economy.](#)

²⁰ Bartlett, C. 25/02/2025. [Electronic bills of lading a step closer with standardised framework.](#)

Figure 17 – Global air cargo industry CTK (billions)

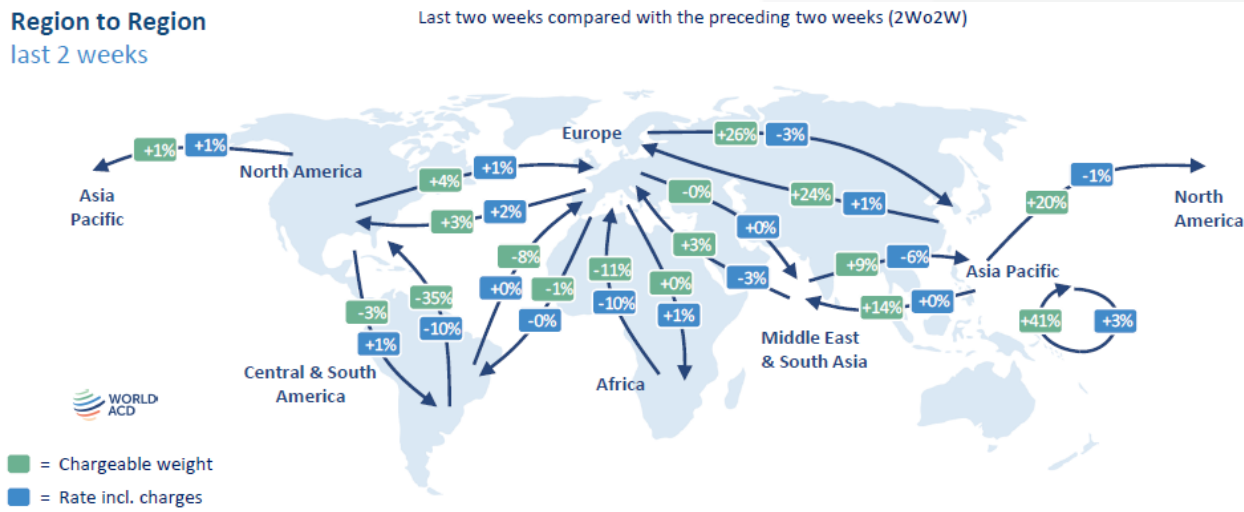


Source: [IATA](http://www.ata.org)

Capacity rose by **↑6,8%** (y/y), outpacing demand, leading to a cargo load factor (CLF) decline to **43,9%**, the lowest in 17 months. Belly-hold cargo continued expanding, now representing **55,2%** of international shipping. Jet fuel prices fell **↓11,2%** (y/y), while global air cargo yields increased **↑7%** (y/y), continuing an upward trend but declining **↓9,9%** (m/m). Economic indicators signal a moderate demand outlook, with trade and production stabilising.

In the high-frequency metrics, global air cargo tonnage continued to recover in week 8, with worldwide volumes up **↑1%** week-on-week. The strong rebound in Asia Pacific volumes persisted, rising **↑6%** following a **↑20%** increase in week 7, bringing levels back to mid-January. Demand from Asia Pacific to the USA and Europe gained **↑5%**, though regional variations were evident:

Figure 18 – Chargeable weight and rates by region (last two weeks, % change)



Global air cargo rates edged up **↑2%** to **\$2,32 per kilogram**, mainly driven by a **↑2%** rise from Asia Pacific. Spot rates from Asia Pacific to the USA rebounded to nearly **\$5/kg**, while Asia Pacific to Europe rates declined slightly to **\$3,99/kg**. Year-on-year, tonnages are up **↑9%** and rates **↑8%**, but Lunar New Year timing distorts comparisons.

In other air cargo news, e-commerce-driven shifts in airfreight markets are emerging, with growing importance placed on regions like the Gulf, India, Vietnam, and Europe while the US becomes less central. Meanwhile, carriers are closely monitoring the China-US market, and airfreight volumes from Asia Pacific are returning to pre-Chinese New Year levels.²¹

ENDS²²

²¹ Lennane, A. 28/02/2025. [Expect a shift in airfreight market as ecommerce changes tack.](#)

²² **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.*