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Cargo Movement Update #228[1]

Date: 6 April 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)	30 402	34 637	**65 039**	34 635	39 458	**74 093**	↓12%
Air Cargo (tons)	4 358	3 049	**7 407**	3 792	2 633	**6 424**	↑15%

Monthly Snapshot

Figure 1 – Cyclical[4] monthly cargo volume, year on year (most metrics: Feb '24 vs Feb '25, % growth)

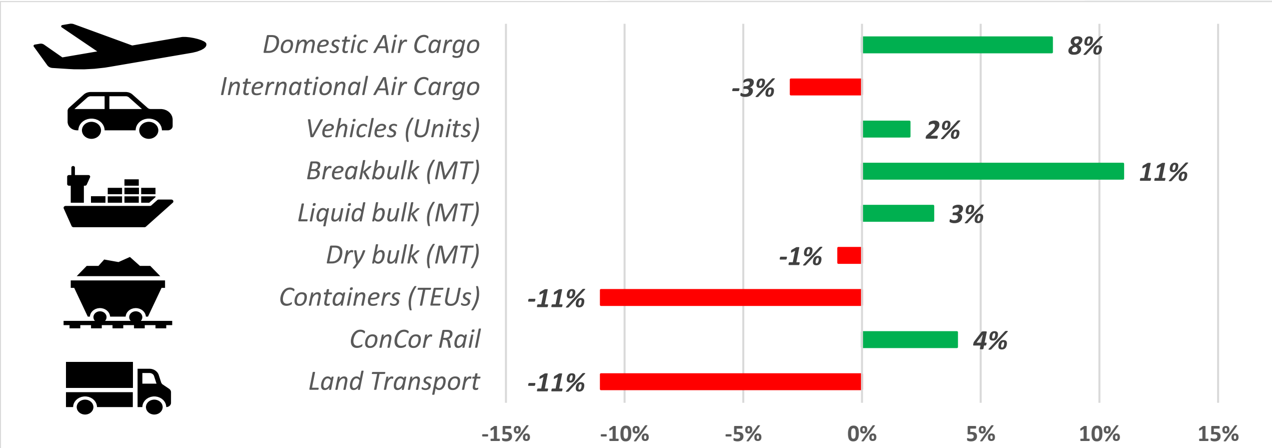
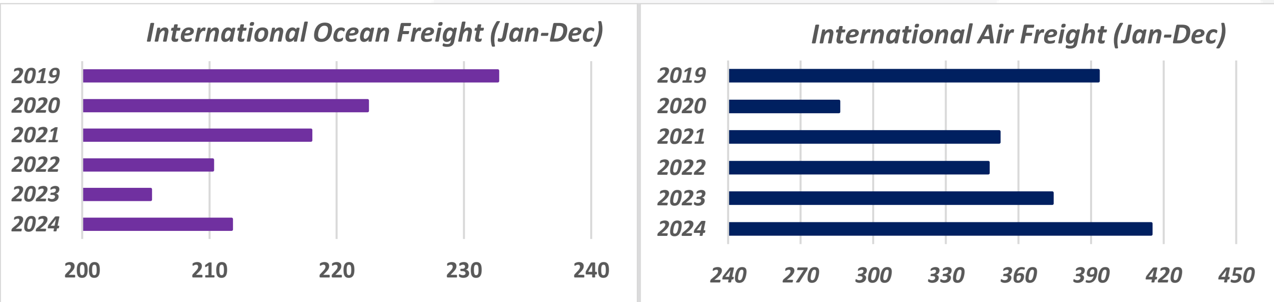


Figure 2 – Year-to-date flows 2019-2024[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~9 291 TEUs** was handled per day, with **~12 964 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 663** containers, up by **↑9%** from last week.
- Truck volumes through Lebombo increased to **1 515 HGVs/day** (**↑3%**), with average crossing times **3,1 hrs**.
- Cross-border queue: **↑2,2 hrs**; transit: **↑1,7 hrs**; SA borders: **13,5 hrs** (**↑30%**); SADC: **5,0 hrs** (**no change**).
- US tariff issued by President Trump affecting **~60% of SA exports to US** and impacting **1,3%** of SA GDP.
- Global spot rates have increased (**↑1,8%**, or **$40**) for the first time since January, trading, at **$2 208/40'**.
- Global air tonnages are up by **↑3%** (w/w), as average overall rates reached **$2,38/kg** (**↑4%**, m/m).

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *228th* 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: Feb vs Feb.
[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. At our container terminals, an average of **9 291 TEUs** was handled per day, representing a slight decrease from **10 585 TEUs** the previous week. Port operations this week were affected by inclement weather, equipment breakdowns, and vacant berths. The Port of Cape Town lost over 30 operational hours to poor weather, while Durban faced persistent equipment failures and similar weather-related delays. Eastern Cape ports experienced disruptions primarily due to vacant berths and adverse weather, with Richards Bay also conceding hours to weather. Maersk has confirmed that the Santa Teresa/250N will omit Cape Town, routing to Europe via Durban to mitigate wind-related delays without affecting export schedules. Additionally, Maersk will reduce demurrage-free days at Durban, Port Elizabeth, and Ngqura Terminals from three to two days for the Reefer Season Peak, as per Transnet's directive. The container corridor near Capital Park and Pretoria experienced significant cable theft between Tuesday and Wednesday, causing rail delays. Lastly, TPT has postponed the Carbon Emission Reduction Tariff to 1 July 2025, and a blank sailing was announced for the Far East–South Africa route in week 19 of 2025.

Globally, the world was struck this week by the United States enacted a sweeping **↑10%** universal tariff on all imports—the most comprehensive tariff action since the Great Depression—raising the average effective tariff to approximately **↑20%**, with containerised imports seeing rates exceed **↑36%**. These measures are expected to significantly disrupt global trade, with heightened risks of inflation, recession, and retaliatory actions, notably from China. Analysts predict a reconfiguration of international supply chains, especially for containerised imports from Asia, which face the steepest increases. This has prompted carriers and shippers to reassess routes and sourcing strategies amid fears of stagflation in the US.

Simultaneously, the global container shipping sector is under strain. Despite seasonal expectations post-Chinese New Year, freight rates declined amid aggressive pricing and excess capacity—up **↑27%** year-on-year on Asia–Europe routes. Cancellations surged to 198 sailings across East-West routes (**↑47%**, y/y), possibly signalling weakened demand or strategic capacity management. Yet, this week, global container spot rates saw a modest uptick. Elsewhere, charter rates remain robust, with the Harpex index up **↑69%** (y/y), driven by tight vessel availability, especially in sub-3 000 TEU segments. Despite geopolitical uncertainty, demand for charters remains resilient, indicating continued strain in shipping logistics.

International air cargo to and from South Africa experienced another excellent week, as the daily average of air cargo handled at ORTIA in the previous week amounted to **622 531 kg** inbound (**↑15%**, w/w) and **435 613 kg** outbound (**↑16%**). Another high-volume week – the current volumes remain significantly above last year's levels (**↑18%**, y/y) and a significant **↑35%** above the same pre-pandemic levels of 2020.

Operationally, several developments in and around air cargo operations were noted this week. ACSA has issued a security compliance communique following a TSA audit identifying shortcomings at OR Tambo, while SARS plans to withdraw longstanding low-value import concessions for platforms like Shein and Temu. Both developments signalling tighter regulatory enforcement with potential cost and compliance implications for affected stakeholders.

Cargo flows across the Lebombo Border Post and N4 Corridor have increased slightly this week, with truck volumes at **1 515 HGVs per day** (**↑3%**, w/w). There was an average of **3,1 hours**' worth of queuing time at the border, as the average processing time hovered around **3,1 hours** per crossing. Rail to Maputo increased to an average of **eight trains daily** (although reporting has not been comprehensive, as sugar trains from Eswatini were stable at around **two trains a day** (when reported).

For the rest of the SADC borders, the average queue times increased by around **two hours** from last week, as transit times also increased by around **an hour and a half**. The median border crossing times at South African borders increased by approximately **three hours**, averaging **~13,5 hrs** (**↑30%**) for the week. In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~5,0 hrs** (**no change**). On average, four SADC borders took more than a day to cross last week, including Beitbridge Kasumbalesa (the worst affected, with an average of nearly **two and a half days** from the **Zambia side**), Katima/Mulilo, and Skilpadshek. Other developments include **(1)** border congestion at Skilpadshek and Kopfontein, **(2)** security concerns on the Ngundu-Lundi detour, **(3)** Zimbabwean drivers charged visa fees in the DRC, **(4)** persistent queues at the Sakania Border and **(5)** power outages at Chirundu.

In concluding this edition, our attention draws to the major trade global developments this week: US tariffs. For South Africa, the imposition of 30% tariffs on select exports to the United States marks a significant disruption to a strategic trade relationship. While not all products are affected and the situation remains dynamic, the risk to competitiveness, market share, and sectoral employment is clear. It is imperative that South African exporters, importers, and logistics service providers assess their exposure, communicate with clients and partners, and implement proactive risk mitigation strategies. At the same time, government and industry must work together to accelerate trade diversification, deepen ties with alternative growth markets, and strengthen the enabling environment for affected sectors. The response must be both strategic and coordinated — protecting jobs and industrial capabilities in the short term, while positioning South Africa for greater trade resilience in the long term. Ongoing engagement with US counterparts, both diplomatic and commercial, remains crucial to manage uncertainty and influence future outcomes. The current challenge underscores the importance of agility, foresight, and partnership across the public and private sectors in navigating an progressively unpredictable global trade environment.

Contents

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 31 March to 6 April (measured in TEUs)

7-day flow reported (31/03/2025 – 06/04/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	4 193	29 349	↑7%
New Pier (Pier 1)	1 182	8 276	↓31%
Cape Town Container Terminal	1 333	9 332	↓25%
Ngqura Container Terminal	1 953	13 669	↑14%
Port Elizabeth Container Terminal	106	740	↓46%
Other	525	3 673	↓59%
Total	**9 291**	**65 039**	**↓12%**

Source: Calculated from TPT, 2025. Updated 06/04/2025.

A reduced average of **~9 291 TEUs** (**↓12%**) was handled per day for the last week (*31 March to 6 April, Table 2*), below the projected average of **~11 381 TEUs** (**↓18%** actual versus projected).

For the coming week, an increased average of **~12 964 TEUs** (**↑40%**) is predicted to be handled (*7 to 13 April, Table 3*). Port operations were mainly characterised by inclement weather, vacant berths, equipment breakdowns, and shortages.

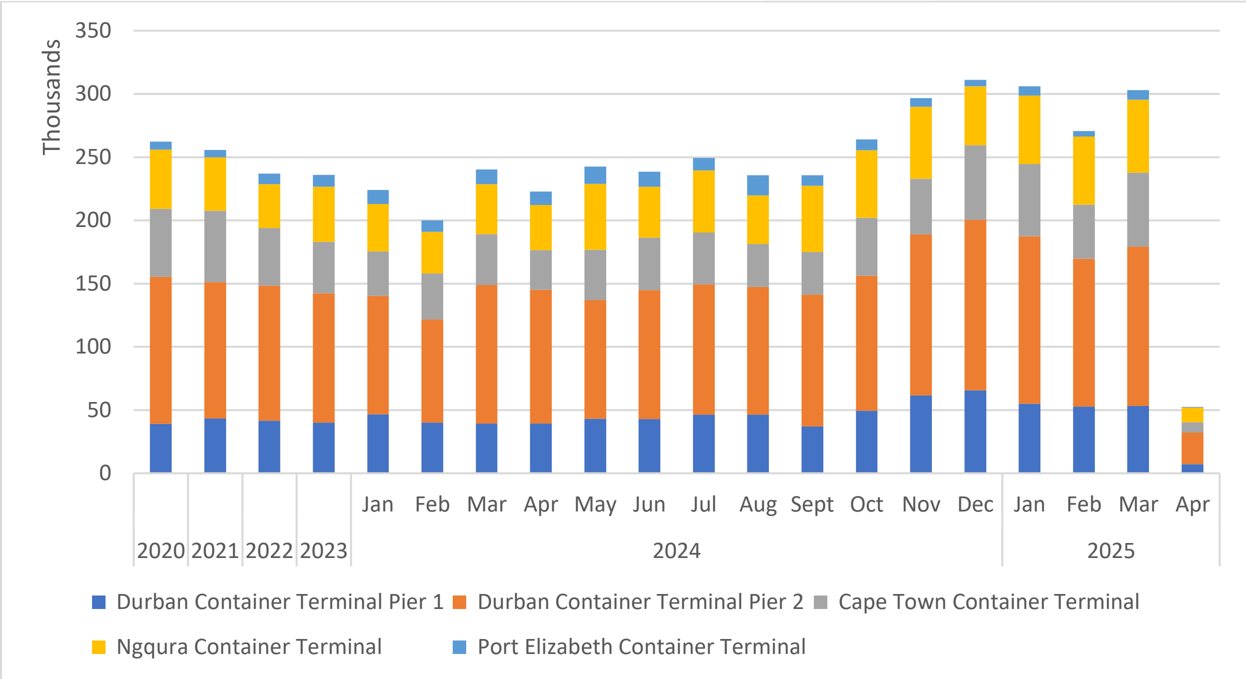
Table 3 – Container Ports – Weekly flow projected for 7 to 13 April (measured in TEUs)

7-day flow projected (07/04/2025 – 13/04/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 805	40 635	↑38%
New Pier (Pier 1)	2 225	15 576	↑88%
Cape Town Container Terminal	1 053	7 369	↓21%
Ngqura Container Terminal	2 353	16 474	↑21%
Port Elizabeth Container Terminal	454	3 175	↑329%
Other	1 075	7 522	↑139%
Total	**12 964**	**90 751**	**↑40%**

Source: Calculated from TPT, 2025. Updated 06/04/2025.

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.

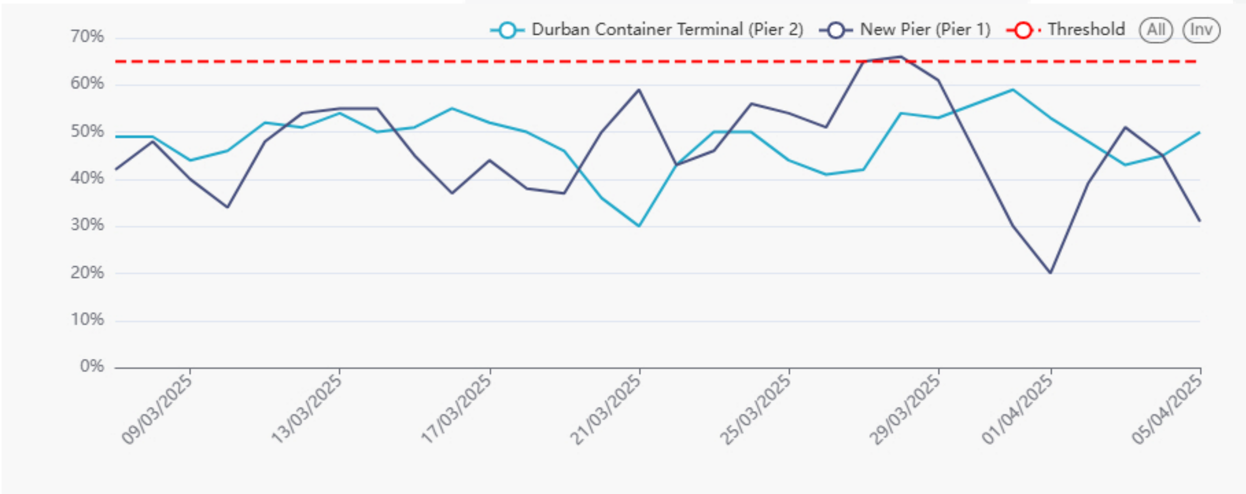
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 06/04/2025.

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

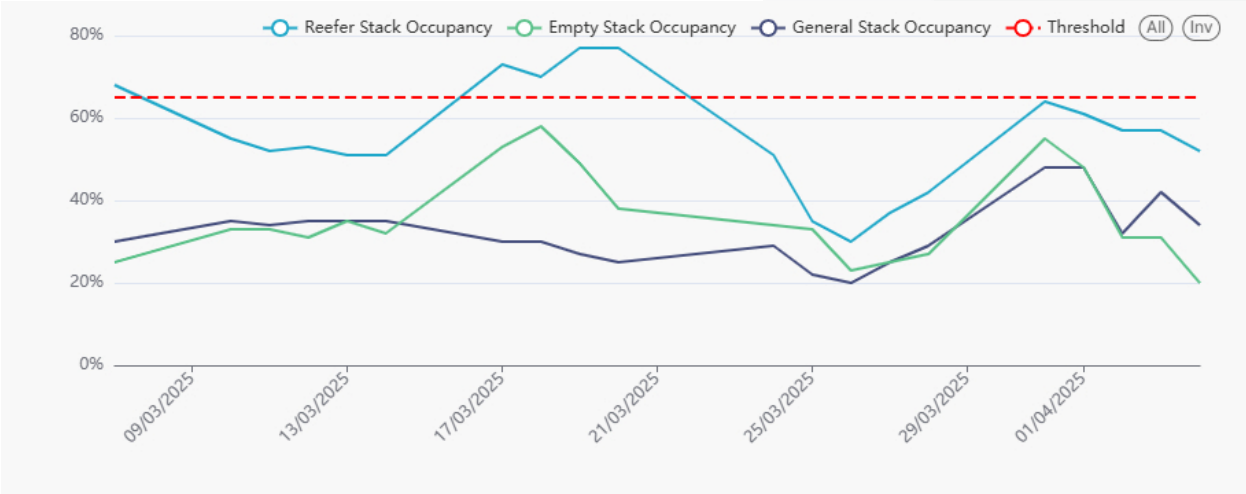
Figure 4 – Stack occupancy in DCT, general-purpose containers (9 March to present; a day on the day)



Source: Calculated using data from Transnet, 2025, and updated 06/04/2025.

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 (9 March to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 06/04/2025.

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 and vacant berths mainly impacted operations at our Eastern Cape Ports.
- Adverse weather conditions were the main operational constraint at the Port of Richards Bay.

ii. Cape Town

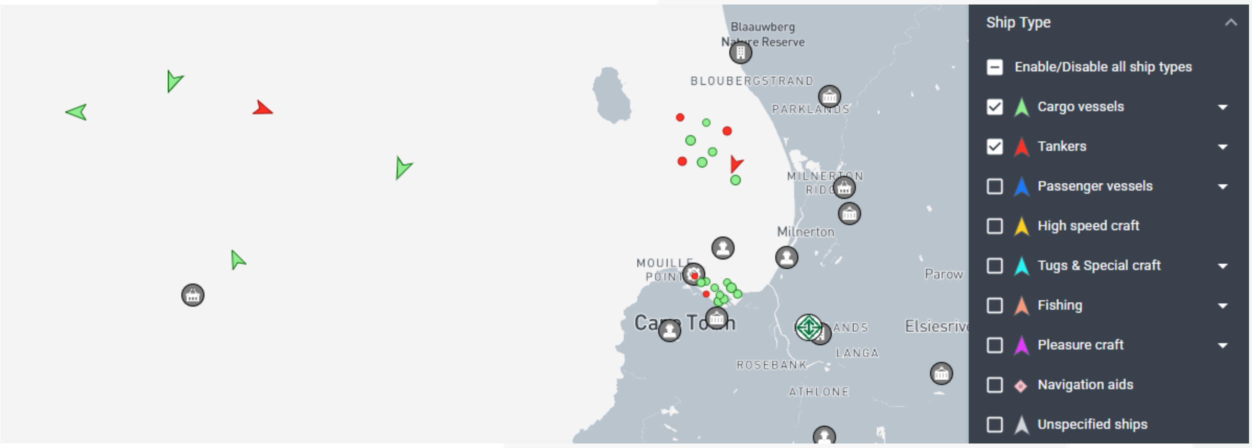
On Thursday, CTCT recorded three vessels at berth and seven at anchor, as adverse weather conditions proved to be the primary operational constraint. The terminal went windbound on Tuesday evening around 22:00 and only resumed operations around 08:00 on Thursday morning. On the landside, between Monday and Wednesday, the terminal managed to service at least 1 899 trucks while handling approximately 57 rail units. On the waterside, the terminal executed approximately 1 920 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 42%**, **reefers at 57%**, and **empties at 31%**. Additionally, the terminal operated with **eight STS cranes**, **23 RTGs**, and **64 hauliers** towards the end of the week. The latest reports suggest that the Rudolf berthed towards the end of the week to offload the new RTGs destined for the port.

The latest reports from Maersk suggest that the Santa Teresa/250N will omit Cape Town and sail to Europe from Durban in order to proactively absorb the wind and productivity delays in Cape Town without impacting export coverage. As a result, the Cape Town imports onboard the vessel will be discharged in Durban to connect to the Kalahari Express. The ETA of these containers into Cape Town remains unchanged.

On Thursday, CTMPT recorded two vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 98 container moves and 1 773 tons across the quay on the waterside, despite being windbound for around six hours. On the landside, 11 trucks were processed during the same period. Stack occupancy was recorded at 9% for general cargo, 63% for reefers, and 0% for empties. Towards the end of the week, the terminal operated with one crane and four straddle carriers. Crane LM550 remained out of commission after a fire incident on the machine, with Crane LM400 awaiting spares for its required repairs.

Between 24 and 30 March, the FPT terminal handled five vessels: one multi-cargo, three dry bulk, and one container vessel. Berth occupancy during this period was recorded at 49%. The terminal planned to handle five more vessels between 31 March and 06 April, with another four vessels scheduled between 07 and 13 April. The late arrival of cargo, equipment breakdowns, and adverse weather conditions ensured operational constraints during this period.

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



Source: Marine Traffic. Updated 07/04/2025 at 14:00.

iii. Durban

On Thursday, Pier 1 recorded two vessels on berth, operated by six gangs, with zero vessels at anchor. Stack occupancy was **51%** for **GP containers**. Between Monday and Thursday, the terminal executed at least 2 620 gate moves and 45 rail moves on the landside. The **average TTT** for the week was **~106 minutes** (**↑8%**, w/w) and an average **staging time** of **~68 minutes** (**↑6%**). Additionally, the terminal moved over 4 000 TEUs across the quay on the waterside during the same period. The terminal operated with **six STS cranes** and **11 RTGs** towards the end of the week. Furthermore, the terminal experienced some weather challenges which impacted operations towards the end of the week.

Pier 2 had four vessels on berth and two at anchorage on Thursday, as adverse weather conditions, system upgrades, and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **43%** for **GP containers**. The terminal operated with **ten gangs** and moved over 8 600 containers across the quay between Monday and Wednesday on the waterside. Approximately 7 368 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~130 minutes** (**↑57%**, w/w) and staging time of **~133 minutes** (**↑60%**). Approximately 780 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **51** and **57** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **61%** during this period.

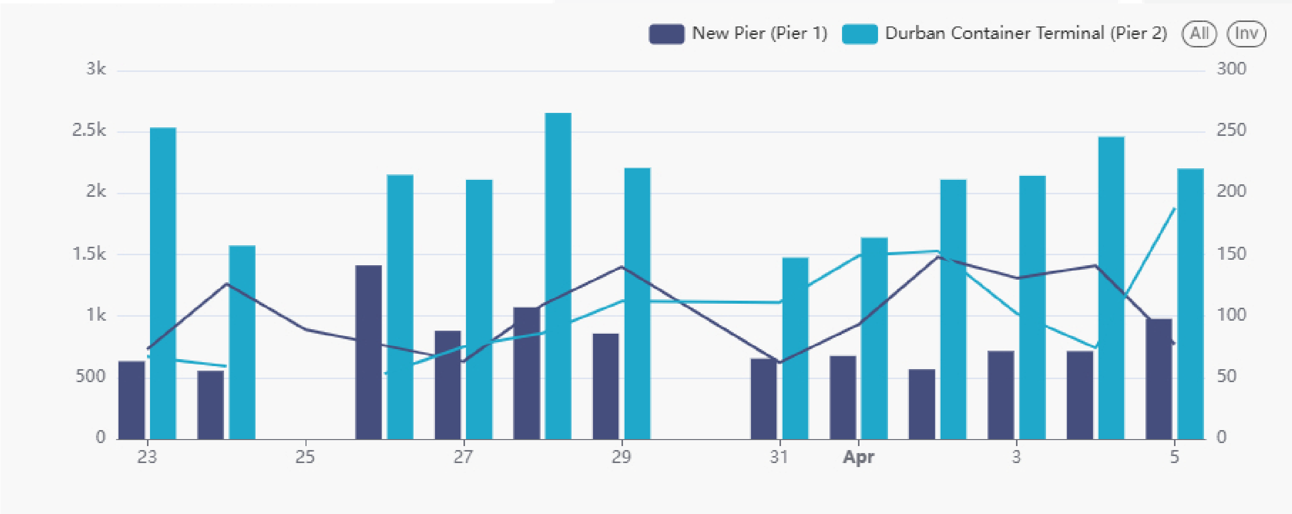
Durban's MPT terminal recorded two vessels at berth on Wednesday and zero at outer anchorage. Stack occupancy for containers was 15%, with the breakbulk stack at 50%. In the preceding 24 hours, the terminal handled 460 containers and 2 254 tons of breakbulk on the waterside. On the landside, 154 container trucks and 26 breakbulk RMTs were serviced. During this period, three cranes, seven reach stackers, seven forklifts, and 20 ERFs were in operation. The latest reports suggest that the fourth crane should return to service around the end of July.

On Thursday, the Maydon Wharf MPT recorded zero vessels at berth and none at anchor. On the waterside, no volumes were handled across the quay in the previous 24 hours. Ten trucks were handled on the landside during this period, containing approximately 574 tons. At the agri-bulk facility, zero vessels were berthed or at anchor on Thursday. As a result, no volumes were handled across the quay; however, 44 trucks were serviced on the landside containing approximately 1 473 tons.

On Wednesday, the Ro-Ro terminal in Durban recorded zero vessels on the berth, with none at anchorage. In the 24 hours leading to Thursday, the terminal handled 724 road but zero rail units on the landside while also handling no units on the waterside. Overall stack occupancy was 35%, 80% at Q&R, and 50% at G-berth. During this period, the terminal had 109 high-and-heavy (abnormal loads) on hand and managed to handle ten.

The following figure summarises the performance of Durban's container terminals for the last two weeks, focusing on gate moves and time spent in the terminals.

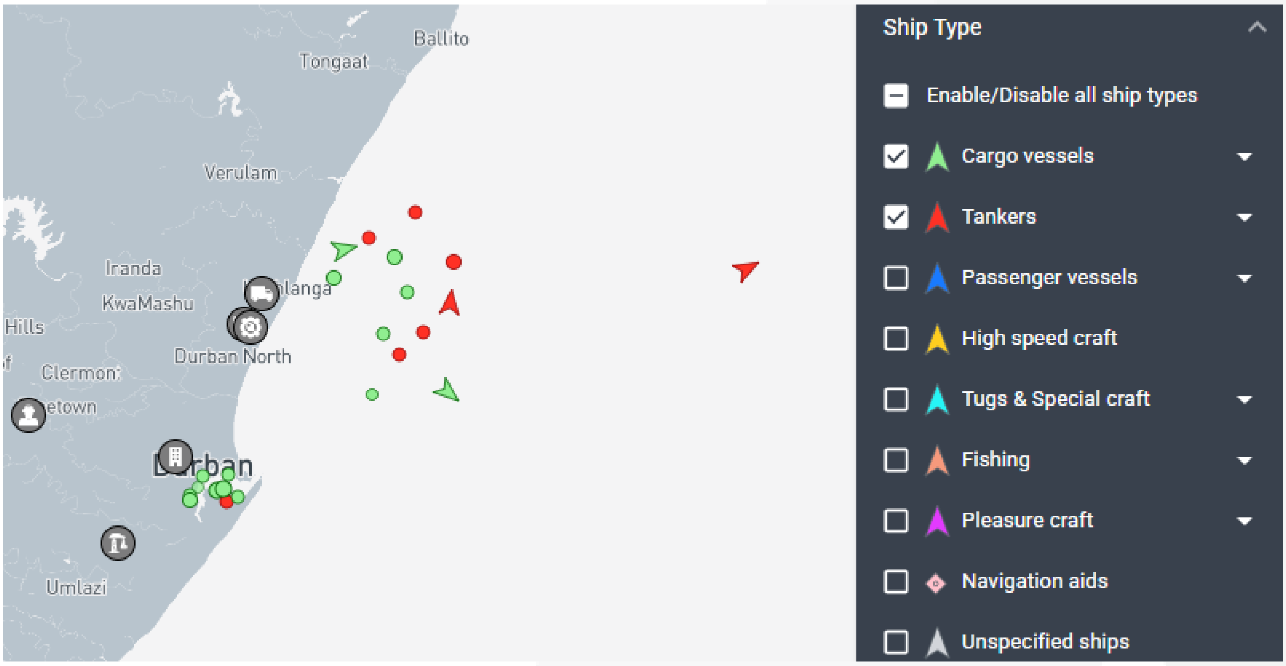
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 06/04/2025.

The queue of container vessels waiting outside Durban remains relatively low. On Monday evening (7 April), only **one** container vessel was waiting for Point. The queue of dry, liquid, and breakbulk vessels remains low, as evidenced by the snapshot:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 31/03/2025 at 14:00.

iv. Richards Bay

On Wednesday, Richards Bay had three vessels at anchor and 15 on the berth, translating to four vessels at DBT, five at MPT, four at RBCT, and one at the liquid bulk terminal, with one vessel undergoing repairs. 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 **111 200 tons** (**↓42%**, w/w). An average of **20 trains** (down by two from last week) were serviced on the landside, slightly below the target of 22.

v. Eastern Cape ports

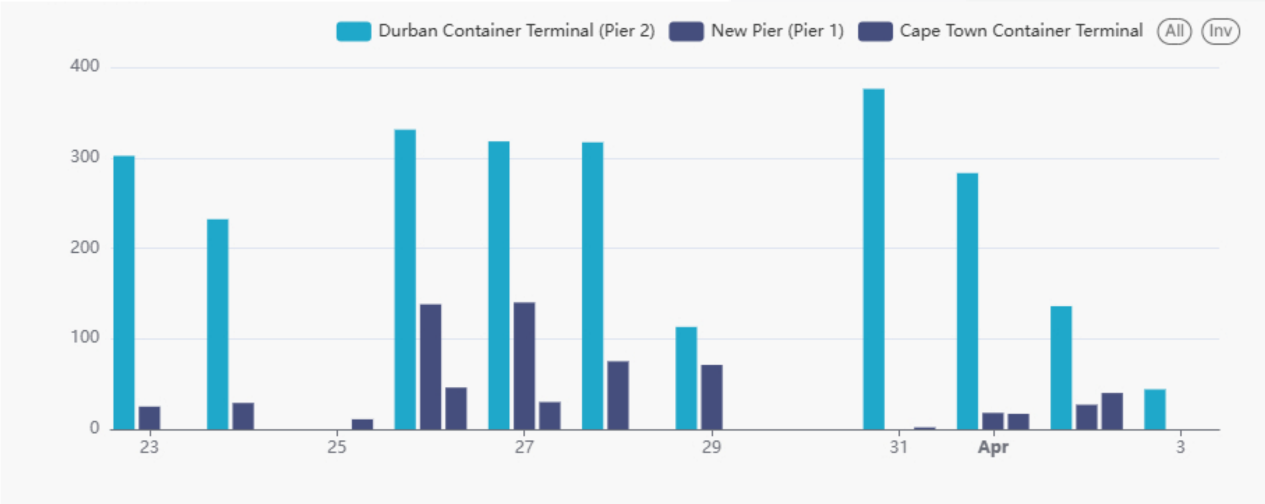
On Wednesday, NCT recorded three vessels on berth and zero at anchor, with none drifting. Marine resources of two tugs, one pilot boat, two pilots, and one berthing gang were in operation during the preceding 24 hours. Stack occupancy figures were recorded at 25% for reefers, 31% for reefer ground slots, and 14% for the general stack. Despite having vacant berths and experiencing equipment breakdowns during this period, the terminal handled over 2 400 TEUs and 111 reefers on the waterside. Approximately 597 trucks were processed on the landside at a TTT of ~30 minutes. Towards the end of the week, the terminal had six STS cranes, 26 RTGs, and 50 hauliers in service.

On Wednesday, GCT had zero vessels at berth and none at outer anchorage. Marine resources of two tugs, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours leading up to Thursday. During this period, 119 trucks were processed at a TTT of ~18 minutes on the landside, while no TEUs were handled across the quay on the waterside. Stack occupancy was recorded at 15% for the general stack, 6% for reefers, and 17% for reefer ground slots. Towards the end of the week, the terminal had one STS crane, one mobile harbour crane, and ten straddle carriers in service.

vi. Transnet Freight Rail (TFR)

Between Tuesday and Wednesday, the container corridor around Capital Park and Pretoria was subject to extensive cable theft, resulting in operational delays on the line. Additionally, towards the end of the week, DCT Pier 2 had 230 ConCor units on hand with a dwell time of 84 hours and 243 over-border units with a dwell time of 50 days.

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



Source: Calculated using data from Transnet, 2024. Updated 06/04/2025.

In the last week (*31 March to 6 April*), rail cargo out of Durban was reported at **2 842** containers, down ↑9% from the previous week's **2 663** containers.

vii. General Update

The latest reports from Maersk suggest that vessel waiting times at CTCT are currently between 7-10 days, with no waiting time at CTMPT. The waiting time at our Eastern Cape Ports is presently captured in zero days, with waiting times at DCT Pier 1 and 2 sitting between 0-2 days. Additionally, the same reports suggest that demurrage-free time days for Durban, Port Elizabeth and Ngqura Terminals will be reduced from three to two days in line with the Reefer Season Peak outlined by Transnet. Reefer Peak Season for Durban, Port Elizabeth and Ngqura is from 01 May 2025 – 31 October 2025.

Furthermore, other sources have announced a blank sailing on the Far East to South Africa trade lane in week 19 of 2025. The Courier on the Ingwe Service has implemented this operational adjustment in response to current vessel scheduling and network optimisation efforts. According to Drewry, approximately 68 shipments globally are expected to be cancelled during the month of April, with the majority of these shipments in trans-Pacific services.

The latest reports from TPT suggest that the implementation of the *Carbon Emission Reduction Tariff* has been postponed to 1 July 2025. This tariff forms part of TPT's commitment to environmental sustainability and aims to reduce carbon emissions at all Durban, Western, and Eastern Cape container terminals.

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 24 March. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *March 2024* averaged **~895 184 kg** daily.

Table 4 – International inbound and outbound cargo from OR Tambo

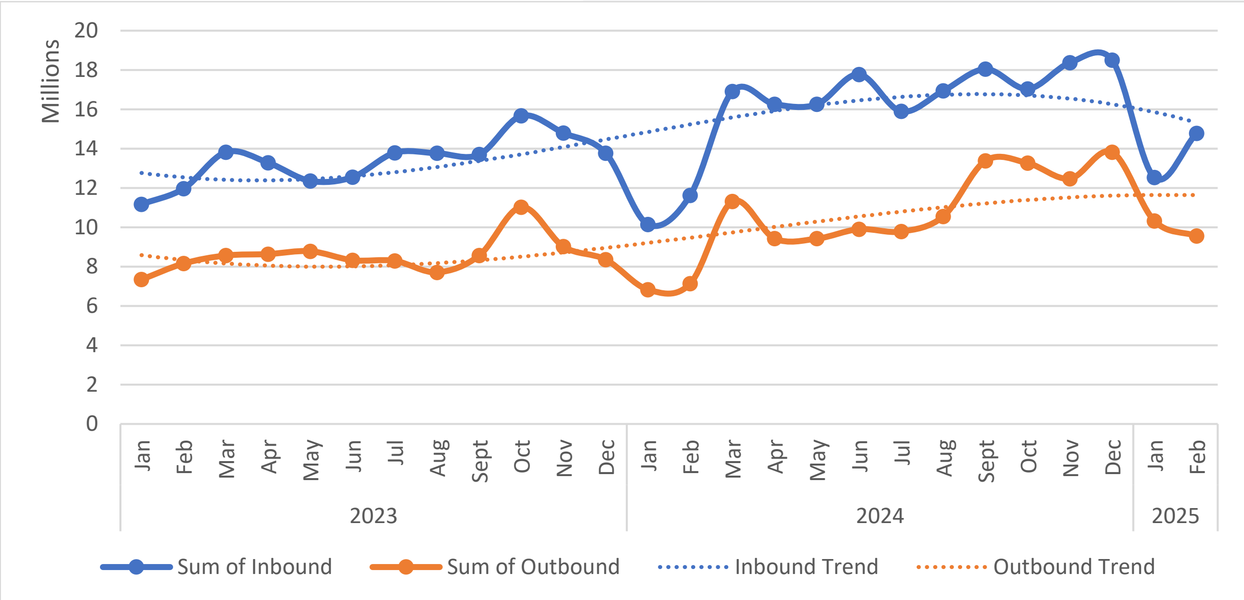
Flows	24-Mar	25-Mar	26-Mar	27-Mar	28-Mar	29-Mar	30-Mar	Week
Volume inbound	466 200	200 344	315 382	173 473	395 525	298 493	2 508 300	**4 357 717**
Volume outbound	144 520	156 736	234 293	199 776	406 421	163 127	1 744 415	**3 049 288**
Total	**610 720**	**357 080**	**549 675**	**373 249**	**801 946**	**461 620**	**4 252 715**	**7 407 005**

Courtesy of ACOC. Updated: 06/04/2025.

In the air cargo space, the daily average of air cargo handled at ORTIA in the previous week amounted to **622 531 kg** inbound (**↑15%**, w/w) and **435 613 kg** outbound (**↑16%**). Another high-volume week – the current volumes remain significantly above last year's levels (**↑18%**, y/y) and a significant **↑35%** above the same pre-pandemic levels of 2020.

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: 06/04/2025.

b. Cargo operations update

This week, ACSA issued a communique following a 2024 audit by the US Transportation Security Administration (TSA) highlighting deficiencies in cargo security compliance at OR Tambo International Airport, including inadequate random searches and improper explosives detection procedures. Stakeholders are reminded to strictly enforce access control, cargo segregation, SOP adherence, and protection of known cargo to align with national and international air cargo security requirements.

Elsewhere, SARS plans to withdraw longstanding concessions that allowed retailers like Shein and Temu (which has this week joined forces with DHL globally[6]) to clear low-value imports under R500 with a simplified 20% flat duty rate, aiming to ensure compliance with current regulations and address concerns

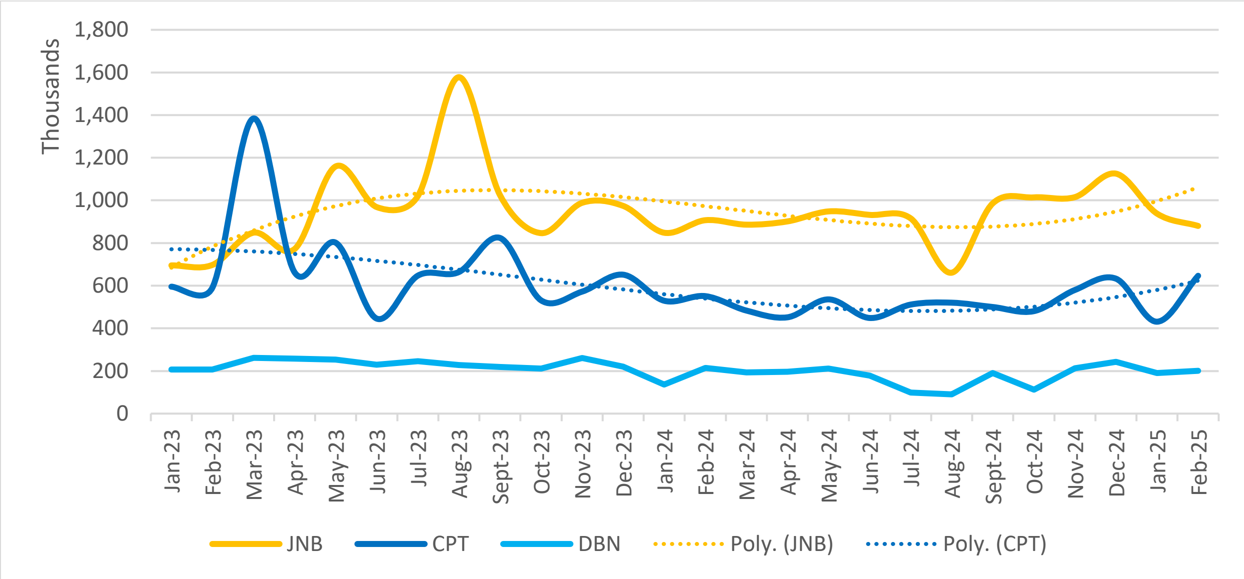
[6] Lennane, A. 04/04/2025. Temu and DHL join forces to expand non-US ecommerce sales.

about unfair competition faced by local businesses. This move may increase operational costs for these e-commerce platforms and have broader implications for various industries that rely on such concessions.[7]

c. 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: 06/04/2025.

3. National trade update

a. US tariff and impact on South Africa

On what has been dubbed "*Liberation Day*" in the United States, President Donald Trump's administration announced tariffs on most nations globally, including a 30% tariff on select South African imports.[8] The initial reaction from industry has understandably been one of shock, and there is a risk of knee-jerk responses. However, it is crucial to recognise that the tariffs are not uniformly applied across all South African goods or to all trading partners, and the situation remains fluid, subject to further negotiation, clarification, and potential revision in the coming weeks.

i. Trade relationship context

The US policy, aimed at recalibrating perceived trade imbalances and stimulating domestic industry, has drawn sharp concern from many trading partners, not least South Africa, which finds itself disproportionately affected in comparison to other countries subject to only **10% duties**.[9]

From a macroeconomic standpoint, the tariffs threaten to alter the structure of one of South Africa's more favourable bilateral trade relationships. South Africa enjoys a positive trade balance with the US (around **R36 billion** in **2024**), with exports valued at approximately **R157 billion** in 2024. The US absorbs about **8%** of South Africa's total exports, while contributing **9%** of its imports. However, in reciprocal terms, South Africa

[7] Business Tech. 03/04/2025. Big changes for Shein and Temu in South Africa.
[8] White House. 02/04/2025. Fact Sheet: President Donald J. Trump Declares National Emergency to Increase our Competitive Edge, Protect our sovereignty, and Strengthen our National and Economic Security.
[9] BBC. 09/04/2025. See the Trump tariffs list by country.

constitutes only **0,44%** of US imports and **0,29%** of its exports — a marginal player in America's trade profile.[10]

ii. Key export categories affected

The tariffs primarily target industrial and manufactured goods. South Africa's key exports to the US include precious metals and stones, motor vehicles, ferro-alloys, agricultural produce, and chemical products. Around 40% of these products remain exempt, either due to existing preferential arrangements or exclusion under Section 232 provisions. Nonetheless, the impact on the remaining 60% could be significant, particularly where cost competitiveness is essential.

iii. Practical cost impact for exports

To illustrate the immediate cost implications, consider a container of South African goods valued at R400,000 that previously entered the US duty-free. The new 30% tariff now adds R120,000 in duties to the landed cost — a substantial increase that could render exports uncompetitive. For context, freight rates during the 2021–2022 global logistics crisis rose from $2,500 to $10,000 per container, adding roughly R139,000 in transport costs, equivalent to 35% of the value. The new tariffs now impose a similarly large burden, but unlike freight, they are policy-driven and less flexible.

iv. Competitive pressures in citrus exports

The impact is especially pronounced in sectors such as citrus, one of South Africa's leading agricultural exports to the US. Here, South Africa faces stiff competition from Spain, Morocco, and Egypt, with Spain subjected to a 20% tariff and the latter two only 10%. While seasonal production differences may reduce direct competition at certain times, these disparities in tariff treatment risk undermining South Africa's market position. In highly competitive retail supply chains, even small cost differentials can shift sourcing decisions, and the industry is already grappling with significant logistics and compliance costs.

v. Broader economic and industrial implications

Although US tariffs affect a relatively small share of South Africa's GDP — around 1.3% — the specific composition of exports matters. Value-added, labour-intensive industries such as automotive manufacturing and agro-processing stand to lose the most. These sectors are core to South Africa's industrial policy objectives and support substantial employment across the value chain.

vi. Government response and strategic outlook

The government's response has been measured. Rather than retaliating with reciprocal tariffs, which it has deemed counterproductive, it has prioritised maintaining a mutually beneficial trade relationship with the United States. At the same time, it is looking to support affected sectors and accelerate efforts to diversify export markets. This dual-track strategy aims to protect South Africa's current market share while reducing dependency on any single partner over time.

As this situation evolves, business and government stakeholders alike must remain agile. Monitoring developments closely, assessing market exposure, and staying engaged with trade policy processes will be essential to navigating the months ahead.

[10] XA Global Trade Advisors. 09/04/2025. The Big Liberation Day Hangover!

b. SARS merchandise trade statistics: February

SARS released its latest "*Merchandise Trade Statistics*" for February[11], revealing a preliminary monthly trade surplus of **R20,9 billion**. Monthly trade data indicates that exports increased by **↑10,4%** from January (m/m) to **R164,0 billion**, while imports decreased by **↓13,5%** (m/m) to **R143,1 billion**. The trade surplus marks a significant improvement from the revised January 2025 deficit of **R16,8 billion**. On an annual basis, export flows for February 2025 were **↑0,5%** (y/y) higher than in February 2024, while import flows were **↓1,5%** lower.

Regionally, trade with BELN countries for February resulted in a trade surplus of **R10,8 billion**, derived from exports of **R16,8 billion** and imports of **R5,9 billion**. Exports to our neighbouring countries increased by **↑4,5%** (m/m) between January and February 2025, while imports rose by **↑4,1%** (m/m) over the same period. Cumulative figures for the year demonstrate a growing trade balance with BELN countries, increasing from **R20,1 billion** in 2024 to **R21,1 billion** in 2025. Excluding BELN countries, South Africa's trade balance with all other trading partners recorded a net surplus of **R10,1 billion**.

4. Road and Regional Update

a. Lebombo border post update

Cargo movements along the N4 corridor remained steady and uninterrupted during the week of 31 March to 6 April, with no disruptions reported. The following notes summarise the recent developments:

- Truck volumes increased slightly this week, with truck volumes at **1 515 HGVs per day** (**↑3%**, w/w).
- There was an average of **3,1 hours**' worth of queuing time at the border, as the average processing time hovered around the same duration – **3,1 hours** per crossing.
- Rail to Maputo increased to an average of **eight trains daily** (although reporting has not been comprehensive).
- Sugar trains from Eswatini were stable at around **two trains a day** (when reported).

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	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**	**2 000**	**20**	**10**	**6**	**4**
31-Mar-25	1 372	1 270	1 208	63	12	48	14	233	**10**	5	2	3
01-Apr-25	1 325	1 229	969	139	67	43	11	257	*	*	*	*
02-Apr-25	1 611	1 420	1 100	244	47	54	50	297	**13**	9	2	2
03-Apr-25	1 535	1 461	1 102	237	59	54	51	260	**11**	9	1	1
04-Apr-25	1 565	1 415	1 105	208	59	72	29	279	**1**	*	1	*
05-Apr-25	1 628	1 504	1 076	260	52	60	56	263	*	*	*	*
06-Apr-25	1 568	1 445	1 114	183	35	56	57	251	*	*	*	*
% of design capacity	**101%**	**93%**	**91%**	**95%**	n/a	**111%**	**77%**	**13%**	**25%**	**77%**	**25%**	**50%**

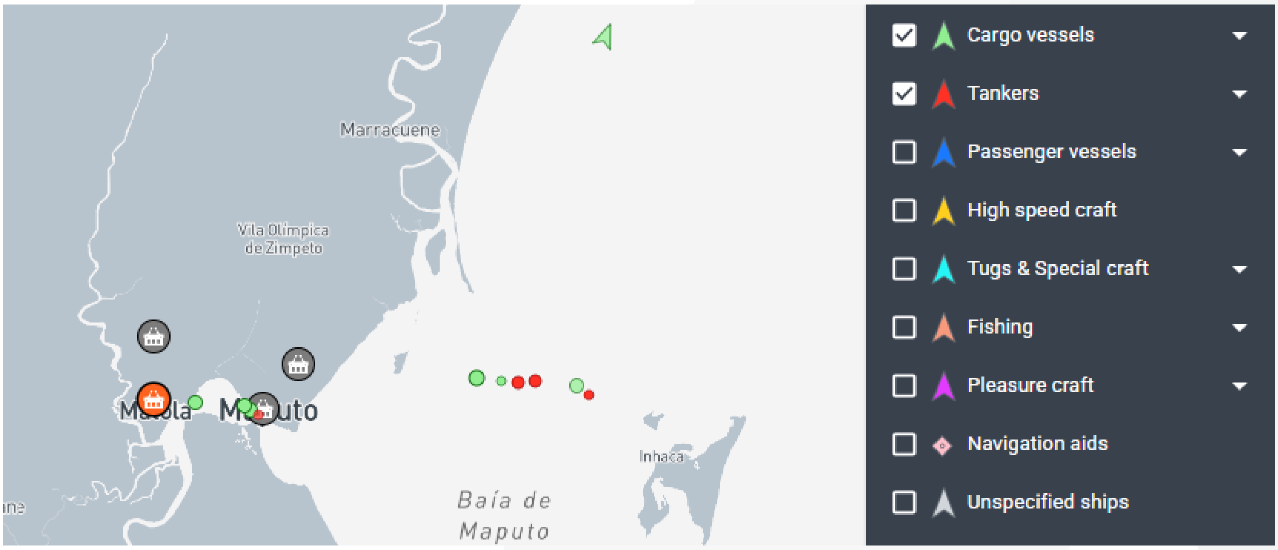
[11] SARS. 31/03/2025. Trade Statistics: February 2025.

% change (d/d)	-4%	-4%	4%	-30%	-33%	-7%	2%	-12%	-15%	0%	*	-50%

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 06/04/2025.
** = 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 31/03/2025 at 14:00.

b. SADC cross-border and road freight delays

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

- The average queue times increased by around **two hours** from last week, as transit times also increased by around **an hour and a half**.
- The median border crossing times at South African borders increased by approximately **three hours**, averaging **~13,5 hrs** (**↑30%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~5,0 hrs** (**no change**).

1. **Security Concerns on Ngundu-Lundi Detour:**
   a. Spike strips are reportedly being laid on the detour route at night, causing vehicle damage and raising serious safety concerns for drivers.
2. **Zimbabwe: Protest Warnings Unmaterialised:**
   a. Despite warnings of major protest action, Beitbridge and other areas in Zimbabwe remained largely calm on Monday, 31 March, with only a few minor, quickly contained incidents.
3. **Zimbabwean Drivers Charged Visa Fees into DRC:**
   a. Zimbabwean drivers have reportedly been inconsistently charged a $50 visa fee at the DRC border, despite an exemption policy.
   b. Following communication with DRC authorities, it was revealed that the DRC Minister had mandated the fee without formal notice. Zimbabwean officials are currently addressing the issue.

4. **Persistent Queues at Sakania Border (DRC):**
    a. Queues of up to 15km—sometimes reaching Ndola—continue daily due to undisciplined queue-jumping, roadworks, and increased southbound traffic.
    b. Sakania is reportedly processing 500 vehicles per day, though no official data has been provided. DRC Customs have been approached for support.
5. **Power Outages at Chirundu:**
    a. On 3 April, Chirundu experienced power issues. However, some trucks have been delayed since Monday, with agents citing persistent power-related challenges.
6. **Border Congestion: Skilpadshek & Kopfontein:**
    a. Transporters are urging 24-hour operations at Skilpadshek and Kopfontein due to ongoing congestion, exacerbated by increased traffic along the Trans-Kalahari Corridor, despite Groblersbrug being operational.

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

Table 6 – Delays[12] summary – South African borders (both directions)

Border Post	Direction	HGV[13] 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	445	29,2	9,5	29,0	13 350	3 115
Beitbridge	Zimbabwe-SA	419	10,0	2,2	9,6	12 570	2 933
Groblersbrug	SA-Botswana	159	8,1	1,3	8,1	4 770	1 113
Martins Drift	Botswana-SA	125	2,3	0,4	2,2	3 750	875
Kopfontein	SA-Botswana	252	11,2	1,3	11,1	7 560	1 764
Tlokweng	Botswana-SA	107	1,0	0,3	0,6	3 210	749
Vioolsdrift	SA-Namibia	30	3,1	1,2	3,2	900	210
Noordoewer	Namibia-SA	20	1,6	0,3	1,4	600	140
Nakop	SA-Namibia	30	6,0	0,4	6,0	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,4	1,1	600	140
Skilpadshek	SA-Botswana	312	34,1	2,5	34,0	9 360	2 184
Pioneer Gate	Botswana-SA	101	2,4	1,1	2,3	3 030	707
Lebombo	SA-Mozambique	1 466	3,1	0,5	3,1	43 980	10 262
Ressano Garcia	Mozambique-SA	1 352	1,6	0,2	1,3	40 560	9 464
Sum/Average		**4 838**	**8,2**	**1,5**	**8,1**	**145 140**	**33 866**

Source: TLC, FESARTA, & Crickmay, week ending 30/03/2025.

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	11,1	2,4	10,9	9 600	2 240

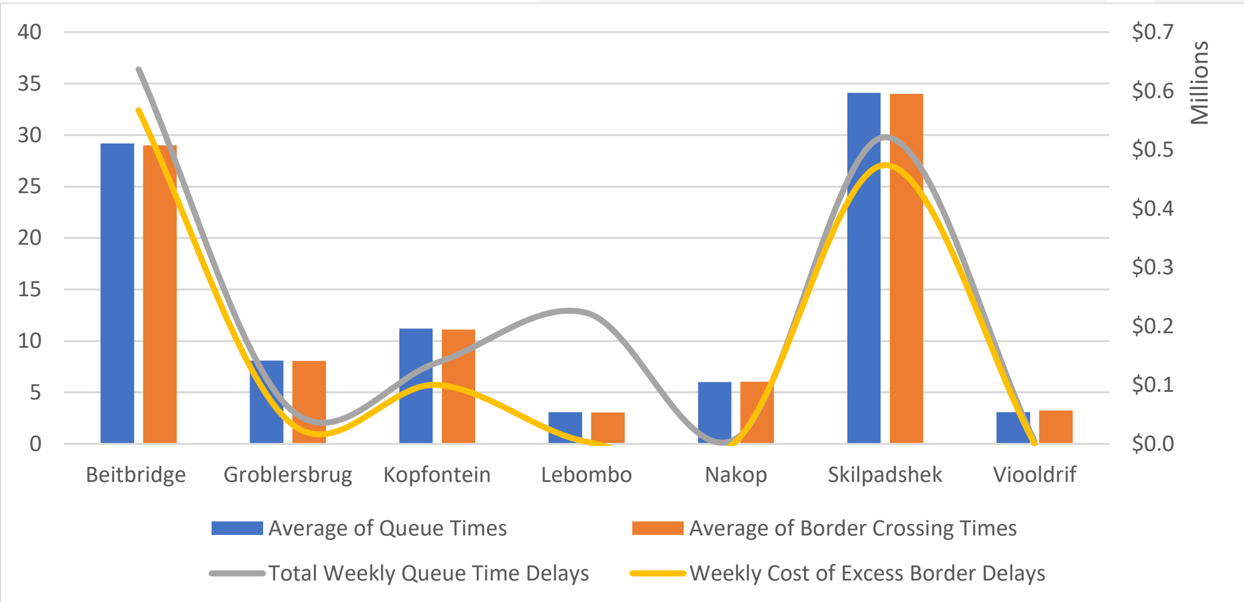
[12] Delays result from various factors like inadequate infrastructure, congestion, poor coordination, and lack of transparent border processes. Issues can be reported through the UNCTAD/AfCFTA NTB platform or FESARTA's TRANSIST Bureau.
[13] Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
Central Corridor	798	3,2	1,7	3,2	23 940	5 586
Dar Es Salaam Corridor	1 819	16,0	2,0	15,8	54 570	12 733
Maputo Corridor	2 818	2,4	0,3	2,2	84 540	19 726
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3 579	10,9	1,8	10,7	107 370	25 053
Northern Corridor	2 817	1,4	0,2	1,4	92 520	21 588
Trans Caprivi Corridor	116	35,2	2,3	35,2	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	443	10,1	1,1	9,9	13 290	3 101
Trans Oranje Corridor	100	3,0	0,6	2,9	3 000	700
Sum/Average	**13 037**	**7,3**	**1,2**	**7,2**	**399 120**	**93 128**

Source: TLC, FESARTA, & Crickmay, week ending 30/03/2025.

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

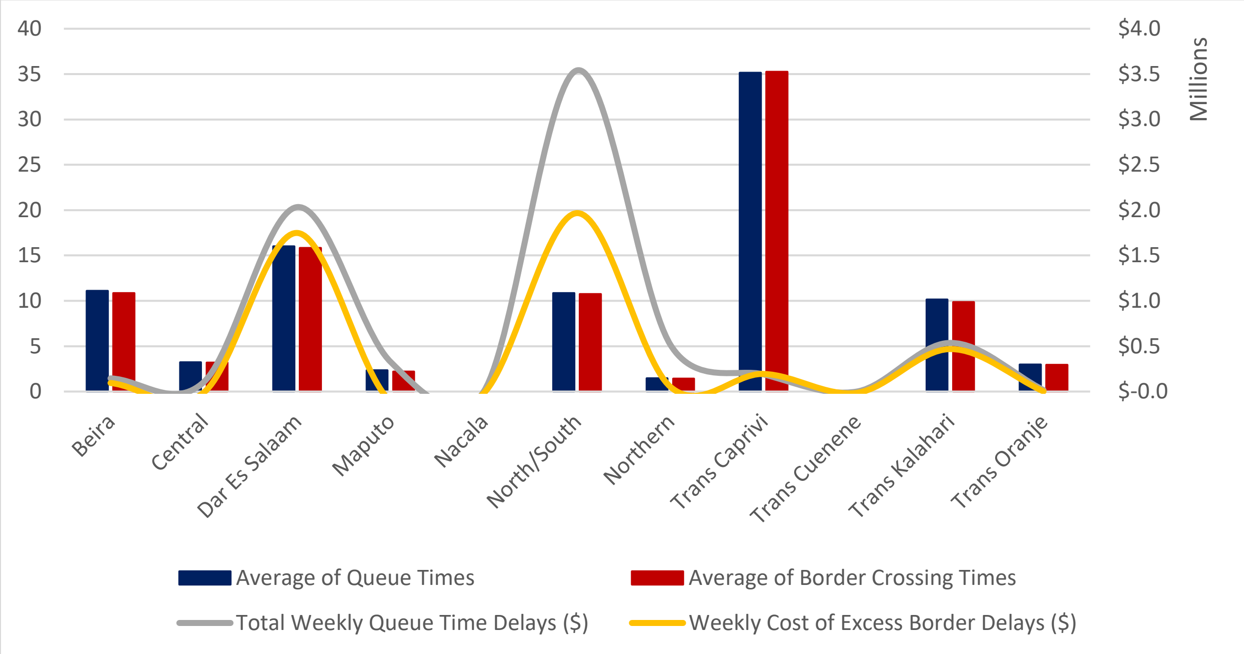
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 30/03/2025.

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 30/03/2025.

In summary, cross-border queue time averaged **~7,3 hours** (up by **~2,2 hours** from the previous week's **~5,1 hours**), indirectly costing the transport industry an estimated **$7,4 million** (**R137 million**). Furthermore, the week's average cross-border transit times hovered around **~7,2 hours** (up by **~1,7 hours** from the **~5,5 hours** recorded in the previous report), at an indirect cost to the transport industry of **$4,4 million** (**R81 million**). As a result, the total indirect cost for the week amounts to an estimated **~$11,8 million** (**R218 million**, up by **~R46 million** or **↑26%** from **~R172 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 trade situation, **(b)** the global shipping industry and **(c)** the global aviation industry.

a. Global trade

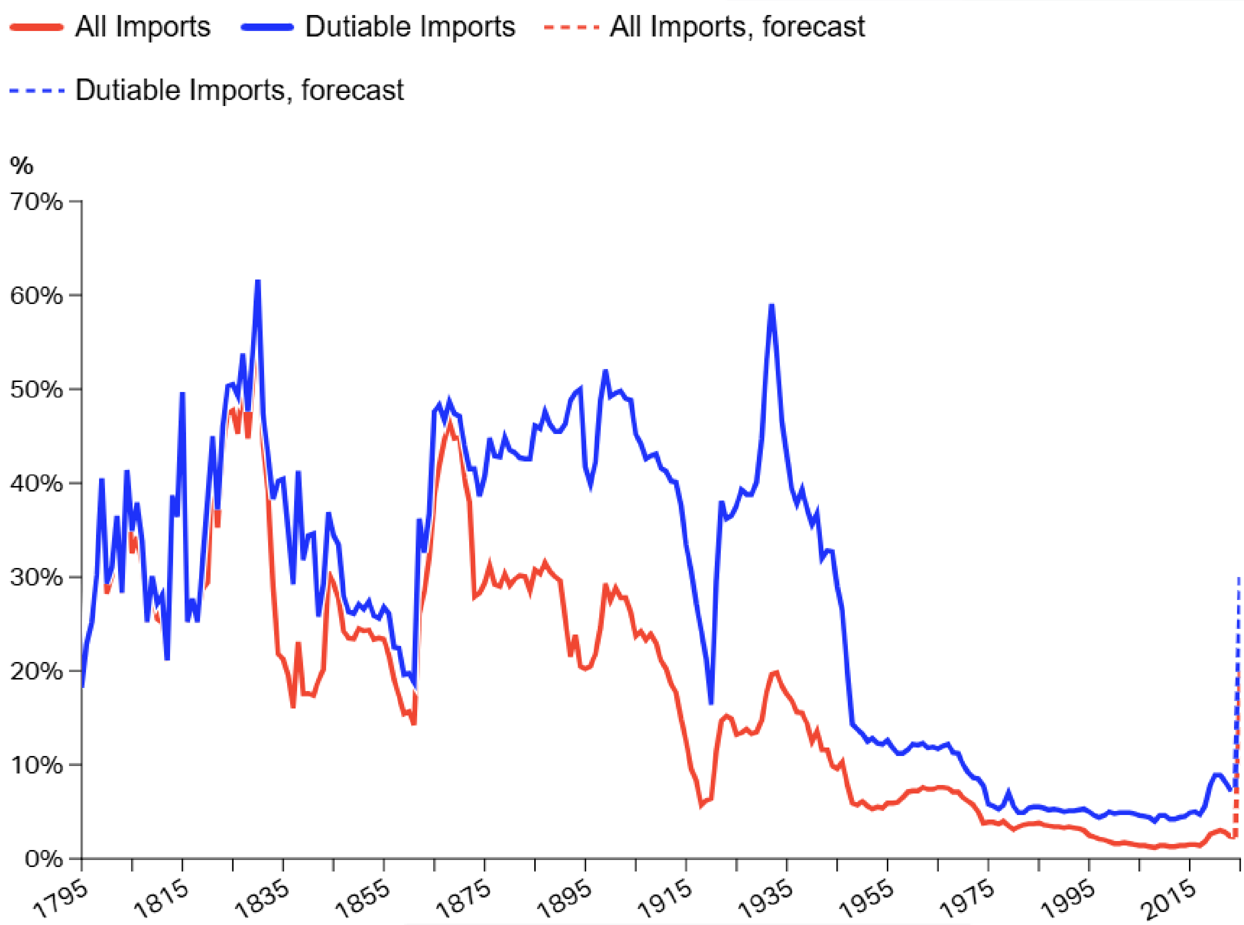
i. US tariffs

In early April 2025, the United States implemented a universal 10% tariff on all imported goods—the first such measure since the Great Depression.[14] This action elevated the average US tariff rate to approximately 20% across all imports and around 30% on dutiable goods. The tariffs have prompted concerns about potential disruptions to global trade, with analysts warning of possible retaliatory measures from affected nations and adverse effects on international supply chains. Economists caution that these tariffs could increase consumer prices and heighten recession risks in the US and globally.[15] The situation remains fluid

[14] IATA. 04/04/2025. US tariffs are now at the highest rate since the Great Depression.
[15] TIME. 04/04/2025. Is the U.S. Heading Into a Recession Amid Trump's Tariffs? 'Liberation Day' Fallout Sparks Fresh Fears.

as policymakers and industry leaders assess the broader economic implications. IATA this week showed that US tariffs are now at the highest rate since the Great Depression:

Figure 15 – US average tariff rate on total imports and on dutiable imports, %, and forecasts



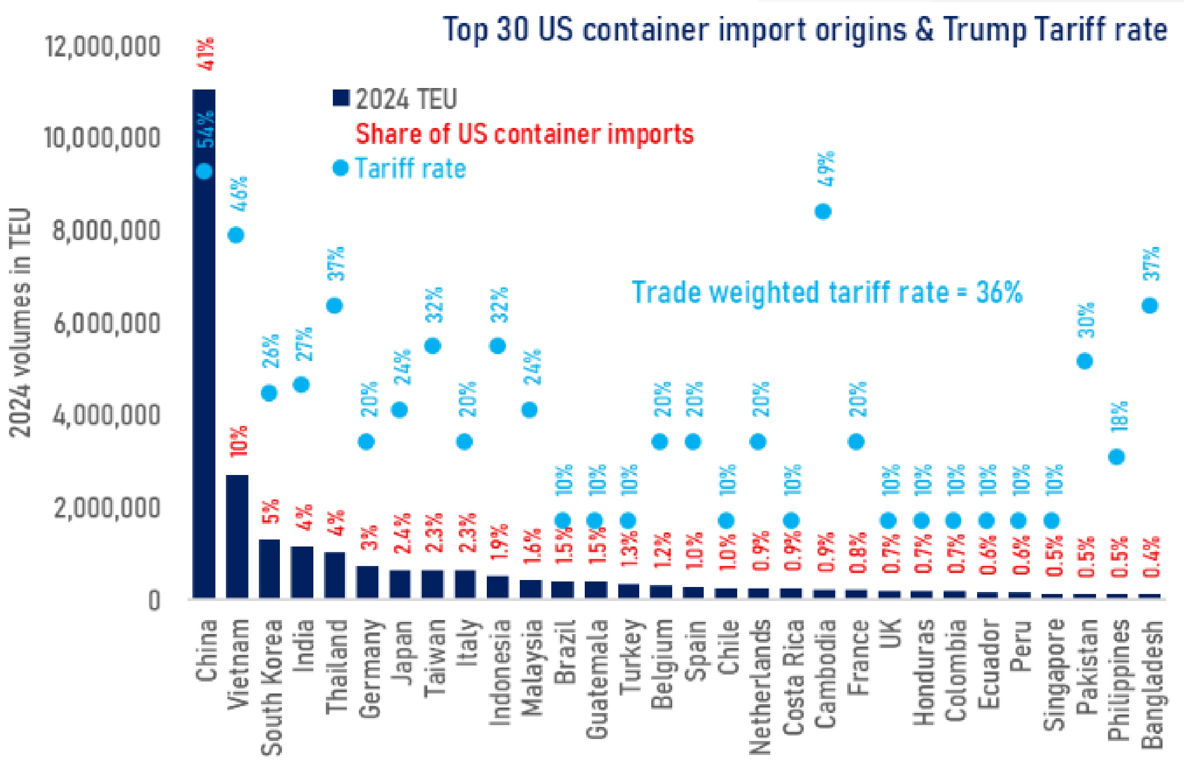
Source: [IATA]

The imposition is poised to significantly disrupt the international shipping industry, leading to notable shifts in trade volumes and routes. According to Drewry, these tariffs are expected to decrease overall trade volumes and prompt a reconfiguration of global shipping patterns, as stakeholders reassess supply chains and sourcing strategies.[16]

Moreover, the tariffs are projected to elevate the effective tariff rate on container imports to over 36%, disproportionately affecting the container shipping sector. This is primarily due to higher duties on imports from China and Vietnam, which collectively accounted for 51% of total US container imports in 2024. The substantial tariffs on other Southeast and South Asian countries further limit the potential for sourcing alternatives, raising concerns about stagflation risks in the US economy. The following illustrates the effective rates for the top 30 container import origin:

[16] Drewry. 03/04/2025. Freight Loop - US tariffs to significantly reshape global trade.

Figure 16 – Top 30 US container import origin & tariff rate (2024 TEU volumes)



Source: Linerlytica

In response to the tariffs, China has announced retaliatory measures, including substantial duties on US goods. This escalation has caused some shippers to halt US-bound transport, exacerbating uncertainty within the shipping sector.[17] Moreover, the new tariffs are anticipated to create significant administrative challenges for customs operations. Industry experts warn of "practical nightmares" and a "bureaucratic monster" due to the increased complexity in customs procedures, potentially leading to delays and increased compliance costs.[18]

b. Global shipping industry

i. Global container industry summary

Against the norm, Sea-Intelligence reported that post-Chinese New Year (CNY) 2025, container freight rates declined more than seasonally expected, potentially due to aggressive pricing among shipping lines and an imbalanced supply-demand dynamic. Furthermore, supply-side data revealed that in the eight weeks following CNY, capacity increased year-over-year (Y/Y) by **↑14%** on Asia–North America West Coast routes and **↑27%** on Asia–Europe routes, while Asia–North America East Coast routes saw a slight contraction of **↓4%**. The substantial capacity growth, particularly on the Asia–Europe route, likely contributed to the spot rate weakness.

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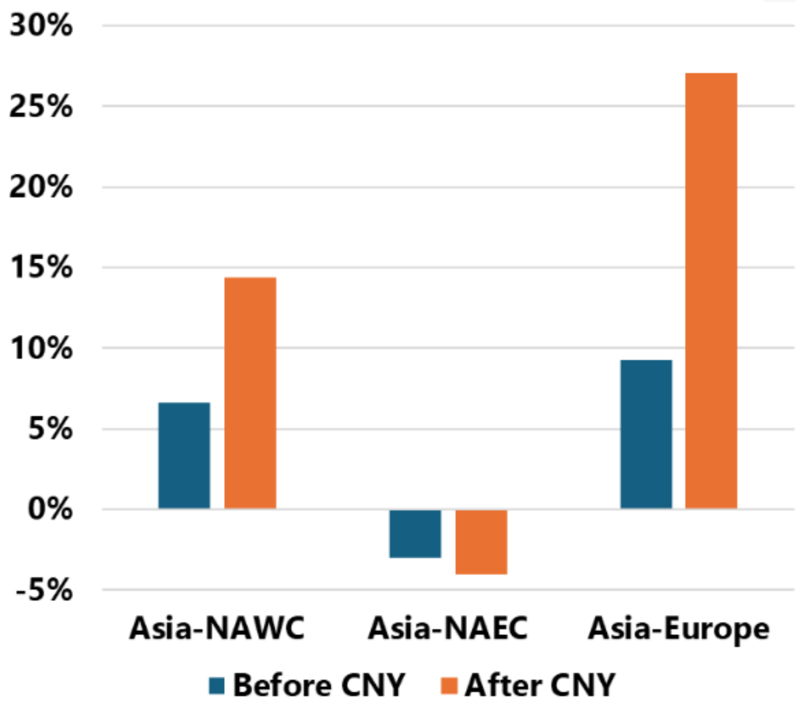
[17] Whiteman, A. 04/04/2025. Mixed response in US to 'Liberation Day', while China leads wave of retaliation.
[18] Goldstone, C. 01/04/2025. Looming Trump tariffs will create 'a bureaucratic monster' for Customs.

Figure 17 – Capacity growth in the eight weeks before/after CNY (%)



Source: Sea Intelligence

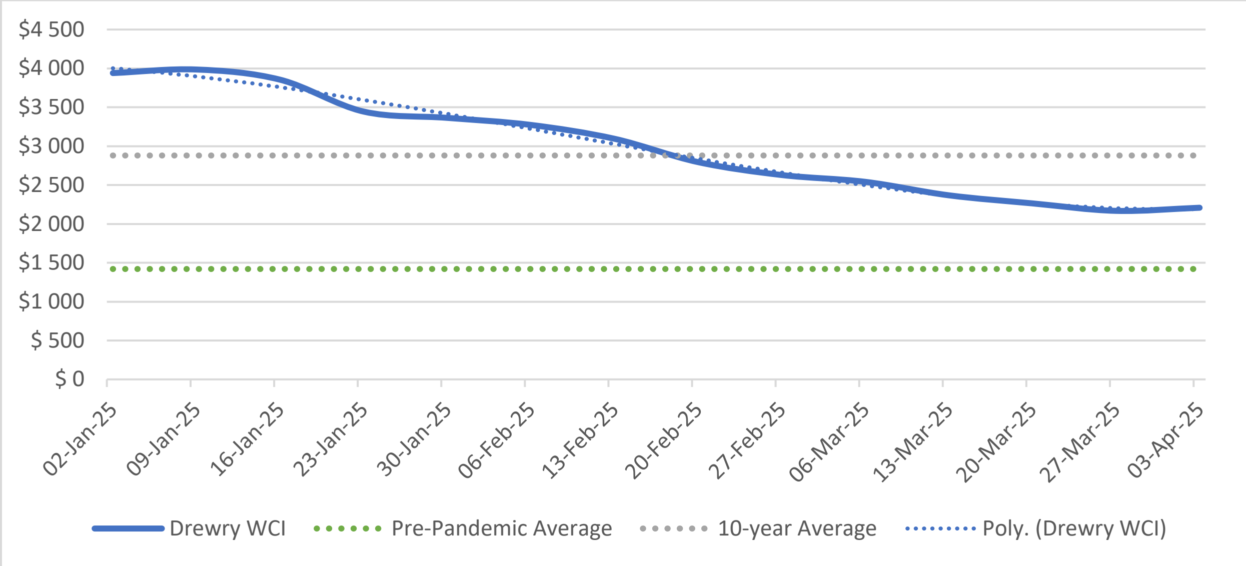
To implement planned General Rate Increases (GRIs) for April, shipping lines may need to cancel more scheduled sailings. As of early April, MSC announced blank sailings on some Transpacific services, but other carriers had not yet followed suit. Moreover analysis by Drewry showed that in March and April 2025, carriers significantly increased cancelled sailings on major East-West routes, totalling 198 cancellations compared to 135 during the same period in 2024. This surge may indicate weaker demand or strategic efforts to bolster freight rates.[19] Collectively, Drewry's "*Cancelled Sailings Tracker*" has stayed stable and is trending around an **8% cancellation rate** of Pro-forma scheduling (7 April to 11 May).[20] Lastly, port congestion is stable this week, as some **2,97 million TEU** (around **9,4% of the global fleet**) are stuck in the system.

ii. Global freight rates

This week, for the first time since 9 January, rates have increased, as Drewry's "*World Container Index*" increased by **↑1,8%** (or **$40**) and now trades at **$2 208 per 40-ft container**[21]. The following figure illustrates the spot rate development since the start of the year:

[19] Drewry. 07/04/2025. Carriers ramp up cancelled sailings: sign of weaker volumes or tactic to raise rates?.
[20] Drewry. 04/04/2025. Cancelled Sailings Tracker.
[21] Drewry. 03/04/2025. World Container Index.

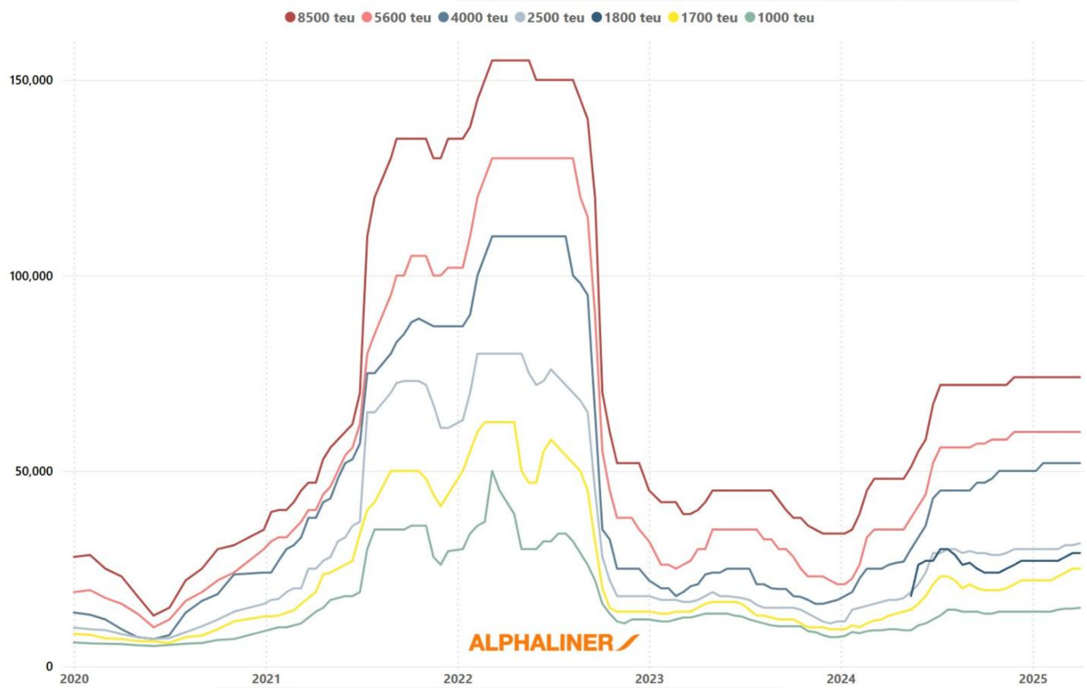
Figure 18 – World Container Index ($ per 40ft)



Source: Calculated from Drewry

Charter rates remain elevated, as the *Harper Petersen Index* (Harpex) traded around **2 082 points** (**↑69%**, y/y) on Friday.[22] Indeed, despite significant policy and geopolitical uncertainties, the charter market remains exceptionally strong, with robust demand across all vessel sizes and charter rates continuing to rise, particularly in the **sub-3 000 TEU segments**:

Figure 19 – Charter rates by segment, 2020-2025 ($ per day)



Source: Alphaliner

[22] Harpex. 04/04/2025. Harper Petersen & Co Charter Rate Index.

The limited availability of tonnage—rather than weak demand—explains subdued activity in larger vessels, while 'spot' vessel availability is nearly non-existent, highlighting sustained tightness in supply amid ongoing newbuild deliveries and minimal scrapping.

c. Global air cargo industry

Global air cargo is stabilising with modest growth. In Q1 2025, worldwide tonnages rose **↑3%** (y/y) and average rates climbed **↑4%**, marking a slowdown from the double-digit growth of late 2024. March saw a strong rebound (**↑19%**, m/m) post-Lunar New Year, with global tonnages up **↑5%** (y/y) and average overall rates reaching **$2,38/kg** (**↑4%**, m/m).

Figure 20 – Capacity, chargeable weight and rates by region (last two – to five weeks, % change)

Origin Regions last 2 to 5 weeks (WORLD ACD)	Capacity[1]			Chargeable weight[1]			Rate[1]		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-4%	+3%		+2%	+8%		+1%	+5%
Asia Pacific		+2%	+3%		+1%	+9%		+6%	+5%
C. & S. America		+2%	-2%		+5%	+5%		+3%	-1%
Europe		+1%	+0%		-3%	-1%		+2%	-1%
M. East & S. Asia		+2%	+3%		-0%	-3%		+3%	-9%
North America		+1%	-0%		-3%	+6%		+1%	-3%
Worldwide		+1%	+1%		-0%	+5%		+5%	+2%

Source: World ACD

Spot rates climbed steadily in late March: worldwide rates rose **↑2%** (w/w) to **$2,70/kg**, while Asia Pacific origins reached **$3,80/kg** (**↑8%**, y/y), despite a **↓3%** (w/w) drop in tonnages. Rates to the USA from Asia Pacific hit **$5,49/kg** (**↑6%**, w/w), even as tonnages dipped slightly (**↓3%**, w/w). Year-on-year, USA-bound tonnages were still **↑7%** up.

The market is closely watching the US's planned removal of de minimis exemptions and the imposition of new tariffs on Chinese and Hong Kong shipments, which are starting to reshape global supply chain flows.

ENDS[23]

[23] **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.*