SAVINO DEL BENE®
Global Logistics and Forwarding Company

CARGO MOVEMENT UPDATE

Date: 30 March 2025

Key Notes

- An average of **~10 585 TEUs** was handled per day, with **~11 381 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 442** containers, down by **↓14%** from last week.
- Truck volumes through Lebombo decreased to **1 466 HGVs/day** (**↓1%**), with average crossing times **2,5 hrs**.
- Cross-border queue: **↓0,5 hrs**; transit: **↓0,3 hrs**; SA borders: **10,4 hrs** (**↓6%**); SADC: **5,0 hrs** (**↓4%**).
- The world's 30 largest container ports collectively recorded a robust **↑7%** (y/y) increase in throughput.

i. Port operations - General

- At our container terminals, an average of **10 585 TEUs** was handled per day, representing a slight decrease from **11 547 TEUs** the previous week.
  - For the coming week, an increased average of **~11 381 TEUs** (**↑8%**) is predicted to be handled.
- Adverse weather, vacant berths, dredging, and equipment breakdowns mainly characterised port operations.
  - Towards the end of the week, adverse weather conditions disrupted operational performance in Cape Town, while equipment breakdowns, shortages, and dredging operations also impacted operations in Durban.
- Citrus exports have commenced early via Durban, with the 2025 season forecast at **106 000 FEUs** — up **↑10%** from 2024 and comparable to 2023.
- Strong winds and vacant berths ensured operational delays at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay.
- The latest reports indicate that the Maersk Colombo 511E will skip the port of Cape Town and proceed directly to Coega to maintain its schedule and ensure a timely arrival in Jebel Ali.
- Furthermore, over the weekend, the rail network experienced intermittent power failures, resulting in operational delays of 6-12 hours.

ii. Port operations – Performance metrics

- CTCT stack occupancy for **GP containers was recorded at 29%**, **reefers at 41%**, and **empties at 27%**.
  - The terminal operated with **eight STS cranes**, **22 RTGs**, and **64 hauliers** towards the end of the week.
  - The latest reports indicate that Crane LC2 remained out of commission for the majority of the week.
  - The terminal managed to retrieve the container that went overboard one of the berthed vessels after a collision with Crane LC1.
  - The retrieval operations seemingly created berthing delays of up to four days at that specific berth.
- CTCT handled a reduced average of **~1 768 TEUs** (**↓20%**, w/w) containers a day. A higher average of **~2 113** (**↑20%**) is projected this week.
- DCT Pier 1: Stack occupancy was **66%** for **GP containers**.
  - The terminal operated with **five STS cranes** and **11 RTGs** towards the end of the week.
- DCT Pier 1 handled **~1 711 TEUs** (**↓1%**, w/w) containers a day, with an average of **~1 641 TEUs** (**↓4%**) projected this week.
  - The **average TTT** for the week was **~91 minutes** (**↑38%**, w/w) and an average **staging time** of **~46 minutes** (**↑39%**).

- DCT Pier 2: Stack occupancy was at **54%** for **GP containers**.
    - The terminal operated with **eight gangs**.
    - The number of available straddle carriers fluctuated between **53** and **58** out of a fleet complement of **88** this week.
        - Thus, the availability figure sat roughly at **63%** during this period.
- DCT Pier 2 handled an average of **~3 905 TEUs** (**↓7%**, w/w) containers a day, with an increased average of **~4 440 TEUs** (**↑14%**) projected this week.
    - Over the last week, the average TTT was **~83 minutes** (**↑46%**, w/w) and the staging time increased by **~60 minutes** (**↑232%**, w/w).
    - The queue of container vessels waiting outside Durban remains relatively low. On Monday evening (31 March), **zero** container vessels were waiting for Pier 1, **zero** for Pier 2, and **one** for Point.
        - The queue of dry, liquid, and breakbulk vessels has also dissipated in recent weeks.
- The citrus export season traditionally runs from April to September, with peak volumes typically observed between weeks 24 and 36.
    - Early-season lemon exports have already commenced, predominantly through the Port of Durban, during weeks 4 to 12.
    - The current national forecast for the 2025 season stands at approximately **106 000 FEUs** — representing a **↑10%** year-on-year increase compared to 2024 volumes and broadly in line with 2023 figures.
- South Africa's other container terminals produced the following results for the week, with throughput levels low at all other terminals:
    - Ngqura Container Terminal handled a decreased average of **~1 716 TEUs** (**↓32%**, w/w) containers a day, with an average of **~1 989 TEUs** (**↑16%**) projected this week.
    - Port Elizabeth Container Terminal handled an average of **~197 TEUs** (**↓45%**, w/w) containers a day, with an increased average of **~272 TEUs** (**↑38%**) projected this week.
    - Other terminals handled a stellar combined average of **~1 287 TEUs** (**↑135%**, w/w), with an average of **~925 TEUs** (**↓64%**) projected this week.
- At RBCT, the daily average for the week increased again to around **193 300 tons** (**↑1%**, w/w).
    - An average of **22 trains** (up by one from last week) were serviced on the landside, which matches the target of 22.
- In the last week (*24 to 30 March*), rail cargo out of Durban was reported at **2 442** containers, down **↓14%** from the previous week's **2 842** containers.

iii. Lebombo update

As of the week spanning 24 to 30 March, cargo flows are relatively unabated across the N4 corridor, with no issues reported. The following notes summarise the recent developments:

- Truck volumes decreased slightly this week, with truck volumes at **1 466 HGVs per day** (**↓1%**, w/w).
- There was an average of **2,7 hours**' worth of queuing time at the border, as the average processing time hovered around **2,5 hours** per crossing.
- Rail to Maputo decreased slightly to an average of **five trains a day**.
- Sugar trains from Eswatini was stable at around **two trains a day**.

iv. Local and cross-border road:

- The average queue times decreased by around **half an hour** from last week, as the transit times decreased by about the **same magnitude**.
- The median border crossing times at South African borders decreased by approximately **half an hour**, averaging **~10,4 hrs** (**↓6%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) also decreased, by **about 20 minutes**, averaging **~5,0 hrs** (**↓4%**).

1. **Groblersbrug border post reopened:**
    - Groblersbrug border post reopened on 27 March at 14:00.
    - In line with standard contingency measures, transporters may continue to reroute via Kopfontein, Skilpadshek, Ramatlhabama, and Beitbridge, provided their cargo declarations were framed before 27 March.
2. **Operational bottlenecks:**
    - Substantial delays are being reported at Beitbridge due to intensified inspections by ZIMRA Anti-Smuggling Unit.
    - Numerous complaints have been lodged by transporters, including a case where a truck was held for two days before being issued a seizure notice—ultimately resolved after FESARTA intervention, which reaffirmed that liability for contraventions rests with the transporter and not the driver alone.
    - A separate transporter reported encountering six roadblocks between Beitbridge and Masvingo (approximately 290 km), which contributed to significant inefficiencies.
3. **Regional protests and border closures:**
    - The Mwanza OSBP was temporarily closed earlier this week following driver protests linked to a spate of violent attacks on truck drivers in Mozambique.
    - The protest was resolved following stakeholder engagements in Tete Province, and operations have since resumed.
4. **Policy clarity at Kasumbalesa:**
    - Drivers entering the DRC at Kasumbalesa have reportedly been charged a $50 visa fee on both entry and exit.
    - However, clarification from a DRC government source confirmed the fee applies only on entry and is not levied on drivers from Zimbabwe or Tanzania.
5. **Emerging political risks:**
    - Unconfirmed reports from Zimbabwe suggest that the military has issued directives advising against school attendance and vehicle movement on 31 March, accompanied by a potential border closure.
    - Although no official confirmation has been issued since, stakeholders are advised to remain vigilant.

- In summary, cross-border queue time averaged **~5,1 hours** (down by **~0,5 hours** from the previous week's **~5,6 hours**), indirectly costing the transport industry an estimated **$5,7 million** (**R105 million**). Furthermore, the week's average cross-border transit times hovered around **~5,5 hours** (down by **~0,3 hours** from the **~5,8 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,6 million** (**R67 million**). As a result, the total indirect cost for the week amounts to an estimated **~$9,4 million** (**R172 million**, up by **~R6 million** or **↑3,%** from **~R166 million** in the previous report.

v. Global shipping industry

- In 2024, the world's 30 largest container ports collectively recorded a robust **↑7%** year-on-year increase in throughput, reflecting broad-based recovery and growth in global trade.
    - This upward trajectory was primarily driven by increased volumes through ports in China, the United States, and the Indian subcontinent.
    - Shanghai retained its position as the world's busiest container port; however, its lead over second-ranked Singapore remained stable, with the two ports separated by approximately **10 million TEUs**.
- For comparison, South Africa's largest port, Durban, handled about **2,6 million TEUs** in 2024, which would approximately place 90th to 100th globally.
    - Durban was part of the top 50 in 2009, handling a volume similar to that of last year (around **2,5 million TEUs**).[1]
- After a strong start to the year in January and February, containerised cargo volumes declined in March, with the anticipated post–Chinese New Year recovery failing to materialise.
    - Current forecasts indicate that global container volumes are likely to contract by **↓1,1%** in 2025, as subdued demand conditions are expected to persist through the traditional summer peak season.
- According to *Sea-Intelligence's* Global Liner Performance (GLP) report, global schedule reliability improved marginally in February 2025, reaching **53,3%**—a **↑1,8%** increase from January.[2]
    - This represents the highest monthly figure since August 2023 and continues the trend of gradual recovery.
- The average delay for late vessel arrivals remained stable at **5,32 days**, unchanged from January and still the lowest level since mid-2024.
- Notably, at the alliance level, the newly launched Gemini Cooperation recorded a striking **94,0%** schedule reliability at origin ports, followed by MSC at **79,6%** and Premier Alliance at **60,4%**.
    - Among the traditional alliances, Ocean Alliance scored **54,1%**, while the outgoing THE Alliance and 2M registered **45,3%** and **44,2%**, respectively.
- Despite the developments in schedule reliability this week, Drewry's "*Cancelled Sailings Tracker*" has steadily increased to around a **10% cancellation rate** of Pro-forma scheduling (31 March to 4 May).[3]
- Lastly, port congestion is stable this week, as some **2,89 million TEU** (around **9,1% of the global fleet**) are stuck in the system.
- Global container spot rates have continued their decline as Drewry's "*World Container Index*" dropped another **↓4,2%** (or **$96**) and now trades at **$2 168 per 40-ft container**[4].
- Charter rates also remain elevated, as the *Harper Petersen Index* (Harpex) traded around **2 076 points** (**↑71%**, y/y) on Friday.[5]
- Lastly, HMM has taken delivery of the HMM Green, the first in a series of nine **9 000 TEU methanol-fuelled** containerships ordered in 2023.

vi. South African air industry

- International air cargo to and from South Africa dropped for a second consecutive week.

[1] World Port Rankings. 2009. World Port Rankings.
[2] Murphy, A. 25/03/2025. New carrier alliances launch with record schedule reliability.
[3] Drewry. 28/03/2025. Cancelled Sailings Tracker.
[4] Drewry. 20/03/2025. World Container Index.
[5] Harpex. 28/03/2025. Harper Petersen & Co Charter Rate Index.

- The daily average of air cargo handled at ORTIA in the previous week amounted to **541 659 kg** inbound (**↓7%**, w/w) and **376 084 kg** outbound (**↓4%**).
    - Nevertheless, the current volumes remain slightly above last year's levels (**↑3%**, y/y) and a significant **↑17%** above the same pre-pandemic levels of 2020.
- In February, international air cargo volumes rose month-on-month in Johannesburg (**↑12%**) and Durban (**↑19%**) but fell in Cape Town (**↓19%**), while year-on-year, Durban recorded a substantial increase (**↑54%**), Cape Town a moderate gain (**↑8%**), and Johannesburg a slight decline (**↓5%**).
- Domestic volumes for February indicate that air cargo volumes surged in Cape Town (**↑50%** m/m; **↑17%** y/y), declined in Johannesburg (**↓6%** m/m; **↓3%** y/y), and showed mixed results in Durban with a modest monthly increase (**↑6%**) but a year-on-year decrease (**↓6%**).
- Operationally, at an ACSA Stakeholders meeting, the industry raised urgent concerns over lease delays, with 87% of cargo leases—93% at ORTIA—having expired, which severely impacts investment and operational certainty.
    - In response, ACSA outlined key developments, including **(1)** a new Commercial Contracting Policy to ensure transparent, **(2)** transformation-aligned procurement, **(3)** mandatory B-BBEE level 4 compliance for licence holders **(4)** a R200 million refurbishment of the ORTIA Cargo Precinct and **(5)** phased Midfield Cargo Development projects aligned with long-term growth forecasts, among other developments.

vii. International air industry

- In the third full week of March (17–23 March), average global air cargo rates rose by **↑4%**, returning to levels last seen in mid-January and the previous summer, as markets—particularly ex-Asia Pacific—recover post-Lunar New Year.
- Spot rates increased **↑5%** to **$2,69/kg** and contract rates rose **↑3%** to **$2,40/kg**, averaging **$2,45/kg** (**↑3%**, y/y) across the market.
- In other air cargo news, the surge in semiconductor demand—particularly for AI-related applications—is expected to partially offset the decline in air freight volumes previously driven by e-commerce, offering a potential growth avenue for the sector.[6]

[6] Lennane, A. 24/03/2025. Semiconductors could compensate for air freight's lost ecommerce traffic.