



Date: 6 April 2025

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.

i. Port operations - General

- 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.
 - For the coming week, an increased average of **~12 964 TEUs (↑40%)** is predicted to be handled.
- 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.

ii. Port operations – Performance metrics

- CTCT stack occupancy for **GP containers was recorded at 42%, reefers at 57%, and empties at 31%**.
 - The terminal operated with **eight STS cranes, 23 RTGs, and 64 hauliers** towards the end of the week.
- CTCT handled a reduced average of **~1 333 TEUs (↓25%, w/w)** containers a day, with around **~1 053 (↓21%)** projected this week, although it is unlikely to be achieved.
- DCT Pier 1: Stack occupancy was **51% for GP containers**.
 - The terminal operated with **six STS cranes and 11 RTGs** towards the end of the week.
- DCT Pier 1 handled **~1 182 TEUs (↓31%, w/w)** containers a day, with a much higher average of **~2 225 (↑88%)** is projected this week.
 - The **average TTT** for the week was **~106 minutes (↑8%, w/w)** and an average **staging time of ~68 minutes (↑6%)**.
- 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 **51 and 57** out of a fleet complement of **88** this week.
 - Thus, the availability figure sat roughly at **61%** during this period.



- DCT Pier 2 handled an average of **~4 193 TEUs** (**↑7%**, w/w) containers a day, with an increased average of **~5 805 TEUs** (**↑38%**) projected this week.
 - For the last week, there was an **average TTT** of **~130 minutes** (**↑57%**, w/w) and staging time of **~133 minutes** (**↑60%**).
 - 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.
 - There is, however, a queue currently outside Cape Town.
- 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 increased average of **~1 953 TEUs** (**↑14%**, w/w) containers a day, with an average of **~2 353 TEUs** (**↑21%**) projected this week.
 - Port Elizabeth Container Terminal handled an average of **~106 TEUs** (**↓46%**, w/w) containers a day, with an increased average of **~454 TEUs** (**↑329%**) projected this week.
 - Other terminals handled a combined average of **~525 TEUs** (**↓59%**, w/w), with an average of **~1 075 TEUs** (**↑139%**) projected this week.
- At RBCT, the daily average for the week increased again 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.
- 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.

iii. US tariff and impact on South Africa

- SA faces a **30% US tariff** on select exports—triple the baseline rate—disproportionately affecting key sectors like vehicles, agro-processing, and industrial goods.
 - While **~40% of exports remain exempt**, the **exposed 60%** includes high-value, job-intensive products.
- With the US absorbing **8% of SA exports**, these tariffs threaten competitiveness, particularly in sectors like citrus and automotive components, where even small cost shifts can displace market share.
- Though the direct GDP impact is modest (**~1,3%**), the strategic implications are significant.
 - SA is encouraged to take a measured approach, maintaining diplomatic channels, accelerating export diversification, and supporting affected firms.

i. SARS merchandise trade statistics: February

- SARS released its latest "*Merchandise Trade Statistics*" for February¹, 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.

¹ SARS. 31/03/2025. [Trade Statistics: February 2025](#).



ii. Lebombo 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).

iii. Local and cross-border road:

- 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.

- 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.

iv. Global trade: 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.²
 - 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.³
- 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.⁴
- 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.
- 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.⁵

v. Global shipping industry

- 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%**.
- To implement planned General Rate Increases (GRIs) for April, shipping lines may need to cancel more scheduled sailings.

² IATA. 04/04/2025. [US tariffs are now at the highest rate since the Great Depression.](#)

³ TIME. 04/04/2025. [Is the U.S. Heading Into a Recession Amid Trump's Tariffs? 'Liberation Day' Fallout Sparks Fresh Fears.](#)

⁴ Drewry. 03/04/2025. [Freight Loop - US tariffs to significantly reshape global trade.](#)

⁵ Whiteman, A. 04/04/2025. [Mixed response in US to 'Liberation Day', while China leads wave of retaliation.](#)



- 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).⁶
- 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.
- 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**⁷.
- Charter rates remain elevated, as the *Harper Petersen Index* (Harpex) traded around **2 082 points** (**↑69%**, y/y) on Friday.⁸
- 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**.

vi. South African air industry

- 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.
- 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.

vii. International air 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).
- 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.
- 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.

⁶ Drewry. 04/04/2025. [Cancelled Sailings Tracker](#).

⁷ Drewry. 03/04/2025. [World Container Index](#).

⁸ Harpex. 04/04/2025. [Harper Petersen & Co Charter Rate Index](#).