

Cargo Movement Update #232¹

Date: 4 May 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)	38 356	43 698	82 054	38 556	43 926	82 482	↓1%
Air Cargo (tons)	3 267	2 082	5 349	3 721	2 202	5 923	↓10%

Monthly Snapshot

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

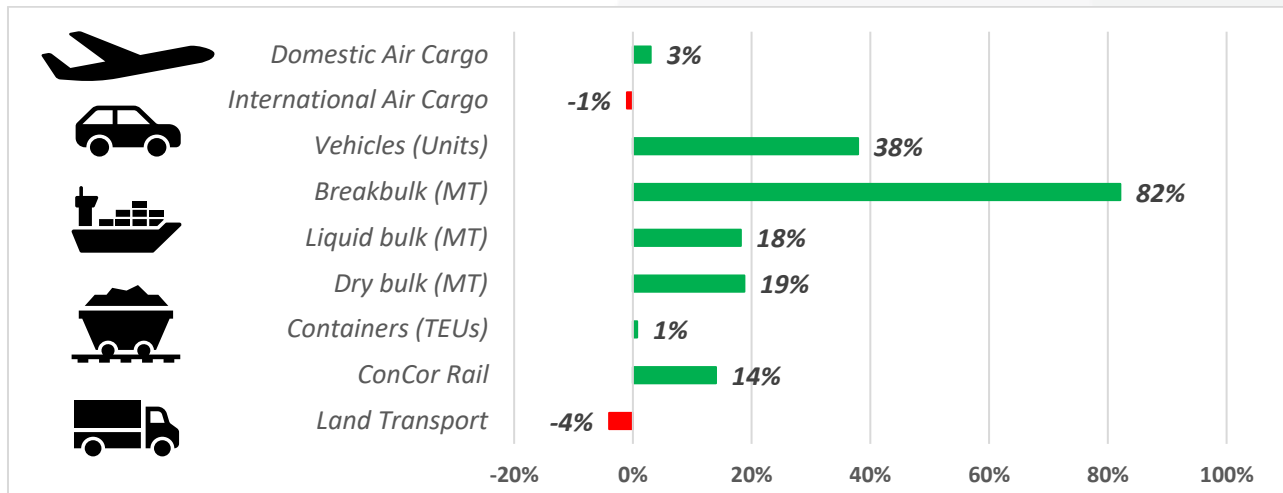
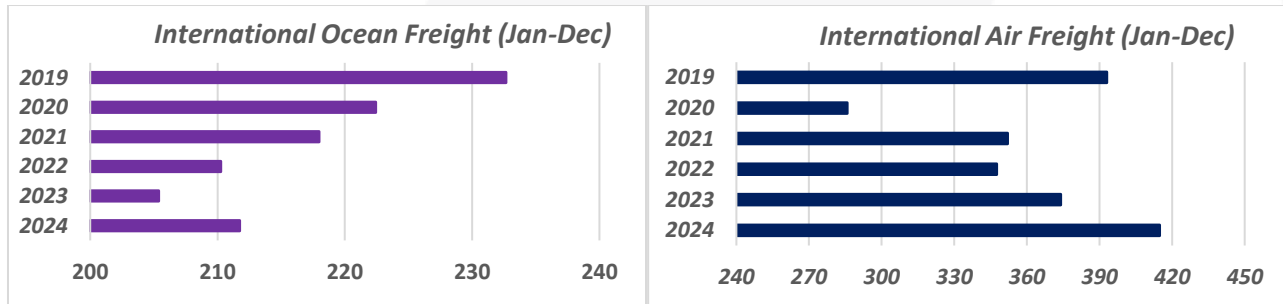


Figure 2 – Year-to-date flows 2019-2024⁵: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of ~11 722 TEUs was handled per day, with ~12 494 TEUs projected for next week.
- Rail cargo handled out of Durban was reported at 1 922 containers, down by ↓32% from last week.
- Cross-border queue: ↓0,2 hrs; transit: ↓0,2 hrs; SA borders: 8,5 hrs (↓32%); SADC: 4,7 hrs (no change).
- Despite US capacity pulled, global schedule reliability improved by ↑3% (m/m) to reach 57,5% in March.
- Global spot rates fell again by ↓3,1% (or \$66) to \$2 091/40'; as charter rates also dropped (↓1,3%, y/y).
- Global air cargo demand rebounded in March, rising by ↑4,4% (y/y) with most regions recording gains.

¹ This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the 232nd 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: Mar vs Mar.

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 **11 722 TEUs** was handled per day, representing an increase from **11 783 TEUs** the previous week. Port Operations were characterised by system challenges, vacant berths, as well as continuous equipment breakdowns and shortages. Dense fog and system challenges ensured operational disruptions at the Port of Cape Town, while the main operational constraints in Durban proved to be inclement weather and continuous equipment breakdowns. Furthermore, significant progress in equipment upgrades—most notably the nationwide rollout of 45 RTGs and new STS cranes for DCT and Pier 1—signals a welcome boost in port capacity and operational confidence. A full closure of the N3 near Pietermaritzburg from 9–11 May 2025 to demolish the Ashburton bridge is expected to cause significant traffic disruption and warrants proactive routing adjustments.

System challenges and vacant berths mainly impacted operations at our Eastern Cape Ports, while adverse weather conditions proved to be the main operational constraint at the Port of Richards Bay. The latest reports from Maersk suggest that the Santa Cruz will do a split call in Cape Town, while the ONE Responsibility/251N will call PECT for full discharge due to expected delays at NCT due to bad weather. The latest reports from TFR suggest that a container train derailed on the line near Dassenhoek and Cato Ridge on Saturday morning. Lastly, Maersk announced the adjusted Terminal Handling Charges (THC) rates per container, to and from Mozambique, taking effect from 1 June 2025.

Globally, the US trade environment (and subsequent global environment) has shifted sharply as new tariffs (**up to 145%**) on Chinese imports have driven up costs by an estimated **\$417 million** on the first vessel out of China arriving at a US port this week, with significant knock-on effects on apparel, footwear, and industrial goods. In response, carriers have withdrawn approximately **8,6%** of FE-WCNA capacity (**200 000 TEUs**), with Hapag-Lloyd cancelling **30%** of China-US shipments and global bookings dropping by up to **30%**. Freight rates and charter indices both declined for a second consecutive week, with ongoing secondary effects of the tariffs evident. Further developments include **(1)** DSV completing its **€14,3 billion DB Schenker acquisition** and **(2)** Houthi rebels targeting vessels linked to specific companies.

International air cargo to and from South Africa decreased somewhat this week. The daily average of air cargo handled at ORTIA in the previous week amounted to **466 777 kg** inbound (**↓12%**, w/w) and **297 379 kg** outbound (**↓5%**). The week marked a second consecutive decrease in international volume. Consequently, the current volumes are slightly down on last year's levels (**↓6%**, y/y) and significantly below the comparative levels of pre-pandemic 2019 (**↓22%**).

Globally, air cargo demand in most regions rebounded in March following February's seasonal dip. However, African carriers faced continued headwinds, with cargo volumes plunging by **↓13,4%** and the Africa-Asia corridor declining for a fourth consecutive month, down **↓40%** year-on-year. Despite global capacity growth, Africa's cargo load factor deteriorated sharply to **37,1%**, underscoring a growing imbalance between supply and demand on the continent.

Cargo flows across the Lebombo Border Post and N4 Corridor have decreased slightly this week, with truck volumes at **1 350 HGVs per day** (**↓1%**, w/w). There was a reduced average of **2,4 hours'** (**↓29%**) worth of queuing time at the border, as the average processing time also decreased to around **2,2 hours** (**↓29%**) per crossing. When reported, rail to Maputo was stable at an average of **eight trains daily**. Sugar trains from Eswatini decreased to around **one train a day** (when reported).

Crossing times were relatively stable this week for the rest of the SADC borders, with some decreases out of South Africa. Overall, the average queue times decreased by around **15 minutes** from last week, as transit times decreased by around the same magnitude. The median border crossing times at South African borders decreased by **four hours**, averaging **~8,5 hrs (↓32%)** for the week. In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs (no change)**. On average, three SADC borders took more than a day to cross last week, namely Chirundu OSBP, Kasumbalesa (the worst affected, with an average of **two days** from **both the Zambian and DRC sides**), and Katima/Mulilo. Other developments include **(1)** interventions to curb constraints at Kasumbalesa, **(2)** several regional rail projects taking shape, and **(3)** updates from the Zimbabwe Vehicle Inspection Department.

In summarising this week's report, these global shifts reaffirm a fundamental truth: logistics performance hinges on the alignment of spatial connectivity with the needs of trade. As capacity adjusts and rates fluctuate, South Africa must prioritise network resilience and infrastructure integration to *"allow trade to flow."* Our current restructuring efforts must be guided by data-driven insights and total economic cost thinking, ensuring that every link in the chain, from terminal to hinterland, serves the competitiveness of our traders.

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1. Ports Update

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

a. Container flow overview

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

Table 2 – Container Ports – Weekly flow reported for 28 April to 4 May (measured in TEUs)

7-day flow reported (28/04/2025 – 04/05/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	4 675	32 726	↑13%
New Pier (Pier 1)	2 202	15 411	↑20%
Cape Town Container Terminal	2 102	14 713	↓18%
Ngqura Container Terminal	1 677	11 738	↓15%
Port Elizabeth Container Terminal	379	2 656	↑4%
Other	687	4 810	↓26%
Total	11 722	82 054	↓1%

Source: Calculated from TPT, 2025. Updated 04/05/2025.

A decreased average of ~11 722 TEUs (↓1%) was handled per day for the last week (28 April to 4 May, Table 2), below the projected average of ~12 494 TEUs (↓6% actual versus projected).

For the coming week, an increased average of ~12 494 TEUs (↑7%) is predicted to be handled (5 to 11 May, Table 3). Port Operations were characterised by system challenges, vacant berths, as well as continuous equipment breakdowns and shortages.

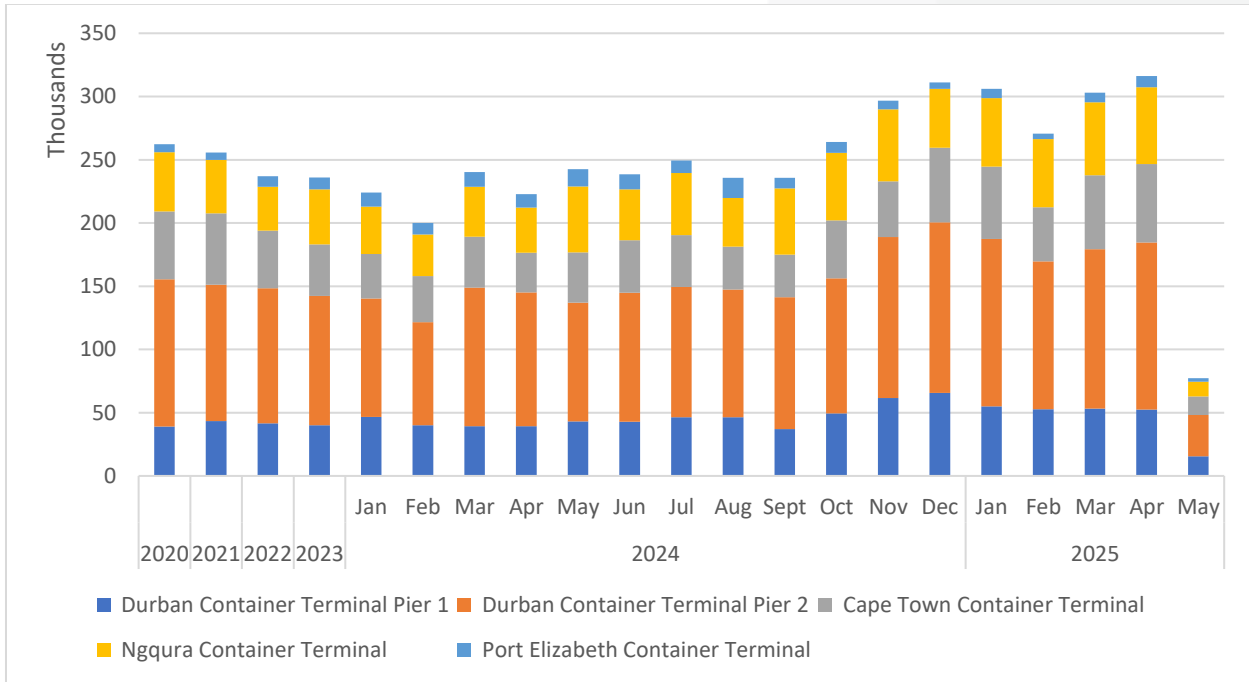
Table 3 – Container Ports – Weekly flow projected for 5 to 11 May (measured in TEUs)

7-day flow projected (05/05/2025 – 11/05/2025)			
Terminal	Daily average	Weekly total	% (w/w)
Durban Container Terminal (Pier 2)	5 258	36 806	↑12%
New Pier (Pier 1)	2 016	14 109	↓8%
Cape Town Container Terminal	1 755	12 283	↓17%
Ngqura Container Terminal	2 059	14 414	↑23%
Port Elizabeth Container Terminal	454	3 178	↑20%
Other	952	6 664	↑38%
Total	12 494	87 454	↑7%

Source: Calculated from TPT, 2025. Updated 04/05/2025.

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.

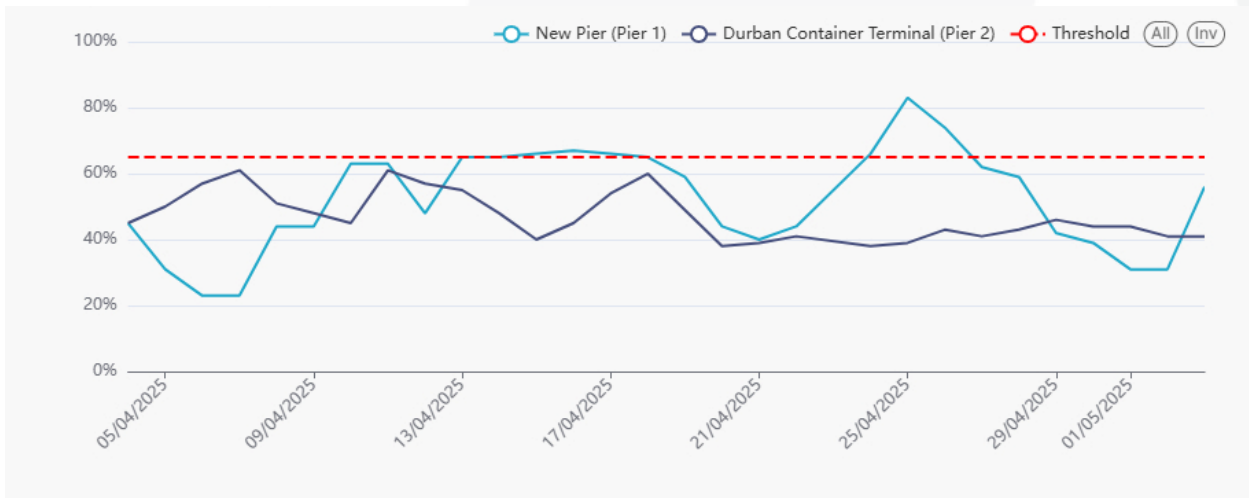
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 04/05/2025.

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

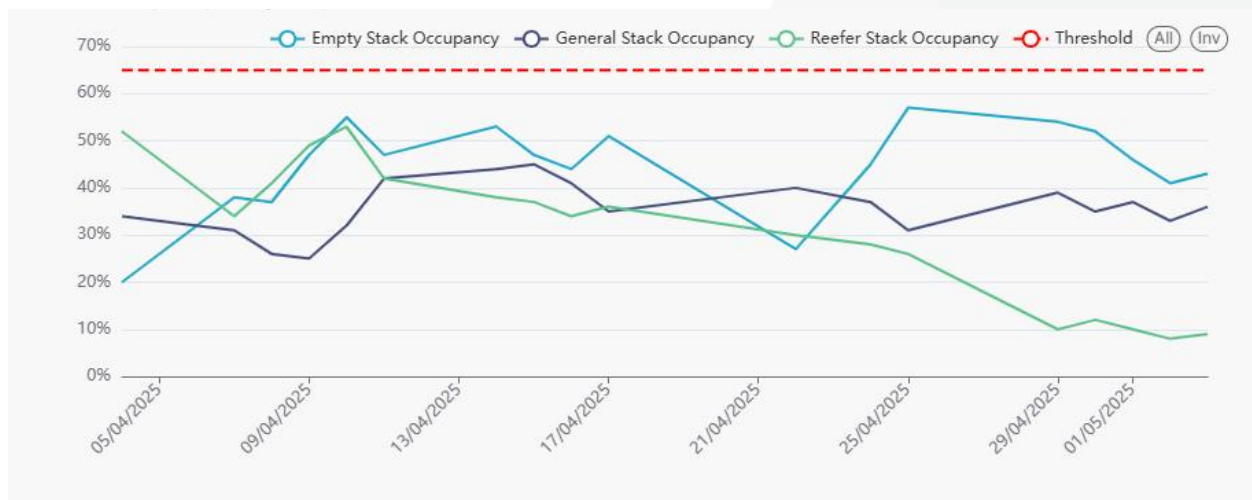
Figure 4 – Stack occupancy in DCT, general-purpose containers (5 April to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 04/05/2025.

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 April to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 04/05/2025.

b. Summary of port operations

i. Weather and other delays

- Dense fog and system challenges ensured operational disruptions at the Port of Cape Town.
- The main operational constraints in Durban proved to be inclement weather and continuous equipment breakdowns.
- System challenges and vacant berths mainly impacted our Eastern Cape Ports operations.
- Adverse weather conditions proved to be the primary operational constraint at the Port of Richards Bay.

ii. Cape Town

On Wednesday, CTCT recorded two vessels at berth and one at anchor, as dense fog proved to be the primary operational constraint. The terminal went fogbound around 06:00 on Tuesday morning until approximately 09:10. Additionally, the terminal also experienced system downtime for an hour on Monday. On the landside, between Tuesday and Wednesday, the terminal managed to service at least 1 968 trucks while handling approximately 34 rail units. On the waterside, the terminal executed approximately 3 118 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 35%**, **reefers at 12%**, and **empties at 52%**. Additionally, the terminal operated with **seven STS cranes, 22 RTGs, and 58 hauliers** towards the end of the week. The latest reports suggest that Cranes LC1 and LC6 were out of commission for the early parts of the week, with the technical team anticipating the return of LC6 on Wednesday.

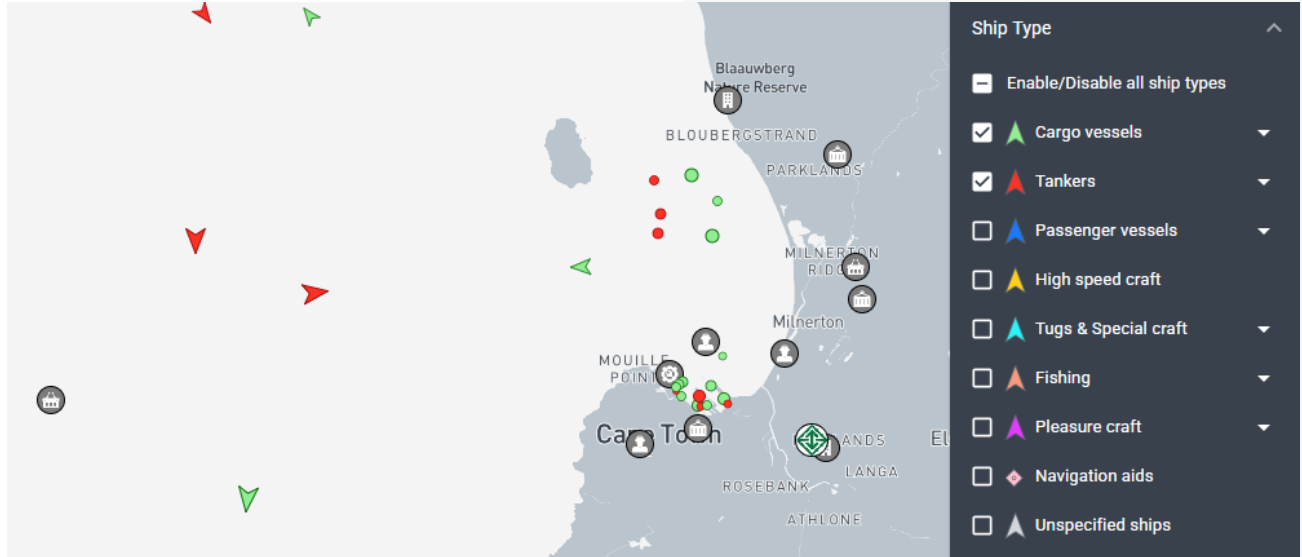
The latest reports from Maersk suggest that the Santa Cruz will do a split call in Cape Town. She is scheduled to berth on 2 May to complete a full discharge, after which she will return for the loading call on 8 May, weather permitting. Stack dates will be communicated accordingly. Please note that stacks will not open on 30 April, contrary to what is stated on the Transnet website. Updated stack dates will be published on the morning of 30 April.

On Wednesday, CTMPT recorded one vessel at berth and none at outer anchorage. In the preceding 24 hours, the terminal managed to handle 59 container moves and 2 636 tons of cement across the quay on the waterside. On the landside, 131 trucks were processed during the same period. Stack occupancy was

recorded at 13% for general cargo, 4% for reefers, and 2% for empties. During the early stages of the week, the terminal was also impacted by dense fog, resulting in some operational delays.

Between 21 and 27 April, the FPT terminal handled five vessels: three multi-cargo, one container, and one bulk vessel. Berth occupancy during this period was recorded at 61%. The terminal planned to handle six more vessels between 28 April and 4 May, with another six vessels scheduled between 5 and 11 May. Dense fog mainly ensured operational constraints during this period.

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



Source: Marine Traffic. Updated 05/05/2025 at 14:00.

iii. Durban

On Friday, Pier 1 recorded one vessel on berth, operated by five gangs, with one vessel at anchor. Stack occupancy was **31%** for **GP containers**. Between Monday and Friday, the terminal executed at least 5 614 gate moves and 87 rail moves on the landside. The **average TTT** for the week was **~80 minutes (↓32%, w/w)** and an average **staging time** of **~54 minutes (↓45%)**. Additionally, the terminal moved over 5 900 TEUs across the quay on the waterside during the same period. The terminal operated with **four STS cranes** and **14 RTGs** towards the end of the week.

Pier 2 had four vessels on berth and zero at anchorage on Friday, as equipment breakdowns and inclement weather prevented optimal operational performance this week. Stack occupancy was recorded at **41%** for **GP containers**. The terminal operated with **11 gangs** and moved over 15 000 containers across the quay between Monday and Friday on the waterside. Approximately 10 915 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~72 minutes (↓12%, w/w)** and a staging time of **~47 minutes (↓35%)**. Approximately 864 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **63** and **67** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **74%** during this period. When reading the turnaround times and equipment availability on the landside in conjunction, it is evident that landside performance continues to improve at both Pier 1 and Pier 2.

Durban's MPT terminal recorded two vessels at berth on Wednesday and none at outer anchorage. Stack occupancy for containers was recorded at 20%, with the breakbulk stack at 5%. In the preceding 24 hours, the terminal handled 390 containers on the waterside. On the landside, 367 container trucks and 17

breakbulk RMTs were serviced. During this period, two cranes, six reach stackers, seven forklifts, and 17 ERFs were in operation. The latest reports suggest that the third crane did not return to operations on Sunday afternoon as anticipated and remains out of commission. The technical team is awaiting a part sourced from Australia, which is expected to arrive before the end of the week.

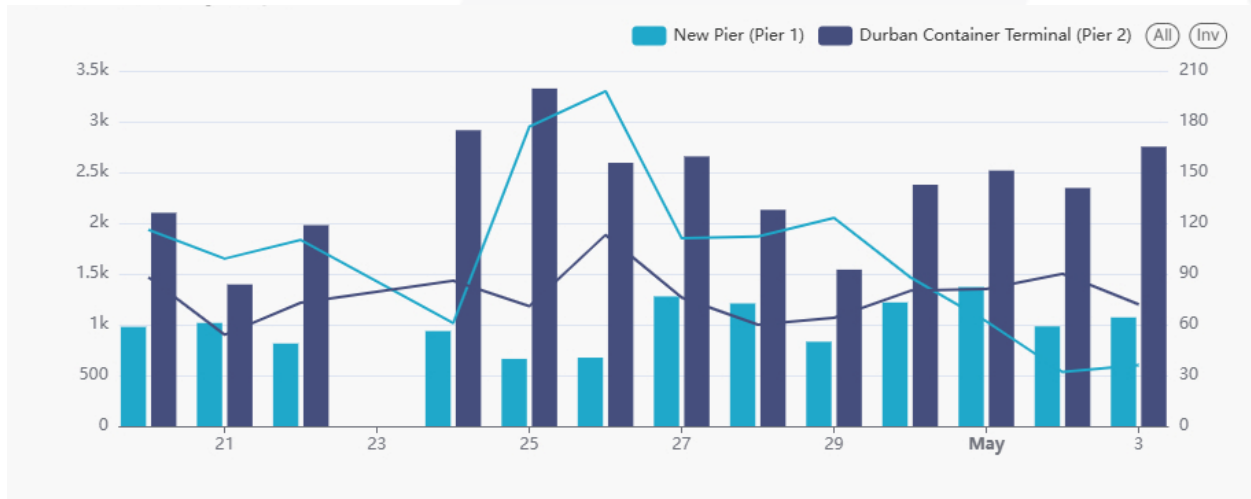
The Maydon Wharf MPT recorded no vessels at berth or anchorage between Tuesday and Wednesday. As a result, no volumes were handled on the waterside; however, 25 trucks were serviced on the landside, containing approximately 1 239 tons. During the same period, the agri-bulk facility recorded one vessel at berth and zero at anchor. On the waterside, approximately 8 488 tons of cargo were handled across the quay. No volumes were handled on the landside.

On Wednesday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with one at anchorage. In the preceding 24 hours, the terminal handled 1 593 road but zero rail units on the landside and 3 530 units on the waterside. Overall stack occupancy was 31%, 95% at Q&R, and 50% at G-berth. During this period, the terminal had 213 high-and-heavy (abnormal loads) on hand and managed to handle 72.

Lastly, A critical road closure is scheduled for the N3 near Pietermaritzburg to facilitate the demolition of the Ashburton (Pope Ellis Drive) bridge. SANRAL has confirmed that the N3 will be fully closed from 20h00 on Friday, 9 May 2025, until 05h00 on Sunday, 11 May 2025. The closure will occur in phases: initial demolition will begin on the evening of 9 May, followed by a full 24-hour closure on 10 May, and final clearance and reopening in the early hours of 11 May. Stakeholders should anticipate significant traffic disruption and plan alternative routes accordingly.

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.

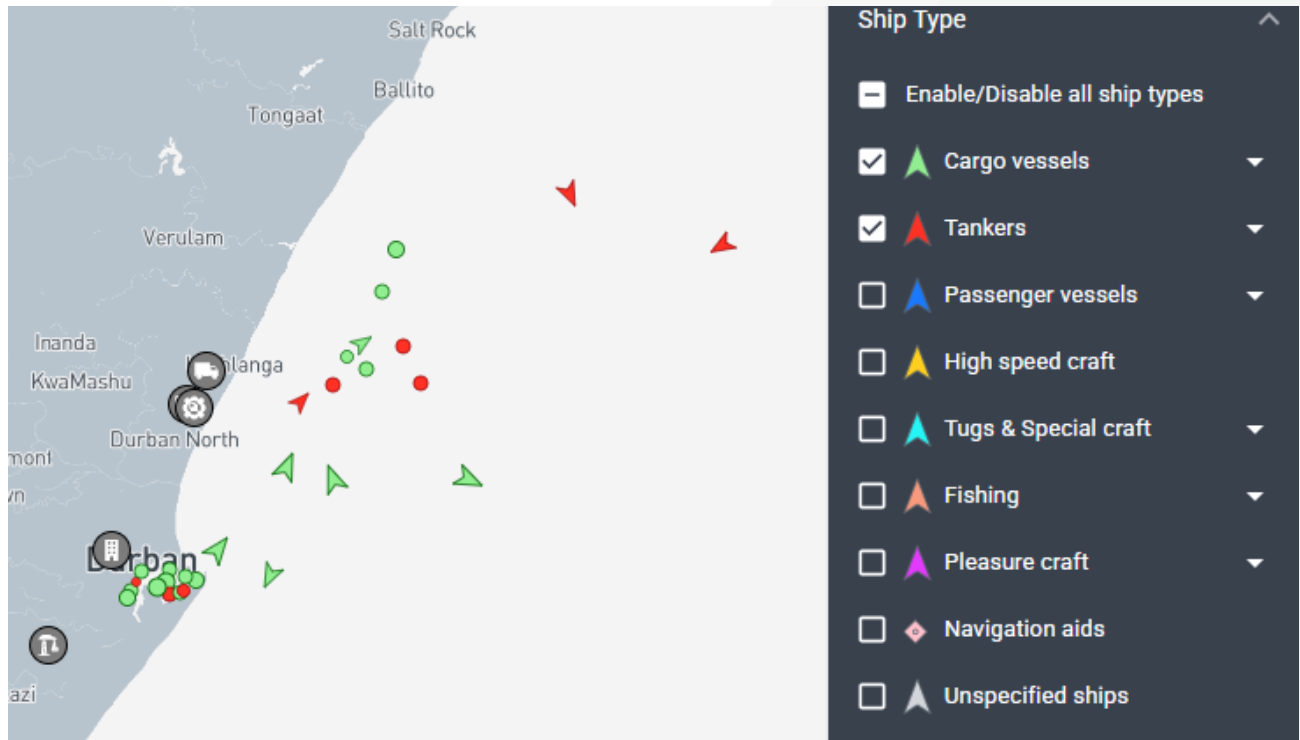
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 04/05/2025.

The queue of container vessels waiting outside Durban has increased slightly from last week. On Monday evening (5 May), **two** container vessels were waiting outside at anchorage for Pier 1, and **two** for Pier 2. The queue of dry (**four**), liquid (**eight**), and breakbulk (**two**) vessels has again increased from last week, and is worth monitoring in the future. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 05/05/2025 at 14:00.

iv. Richards Bay

On Wednesday, Richards Bay had 19 vessels at anchor and 20 on the berth, translating to seven vessels at DBT, five at MPT, six at RBCT, and two at the liquid bulk terminal. Two tugs, one pilot boat, and one helicopter operated for marine resources towards the end of the week. Additionally, adverse weather conditions ensured some operational constraints at the port this week. The daily average for the week was stable (and still high) at around **155 445 tons** (↓2%, w/w). An average of **21 trains** (up by two from last week) were serviced on the landside, slightly below the target of 22.

v. Eastern Cape ports

On Wednesday, NCT recorded two vessels on berth and none 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 29% for reefers, 26% for reefer ground slots, and 18% for the general stack. Despite having vacant berths and a system failure, the terminal handled over 2 203 TEUs and 132 reefers on the waterside. Approximately 632 trucks were processed on the landside at a TTT of ~28 minutes. Towards the end of the week, the terminal had seven STS cranes, 26 RTGs, and 76 hauliers in service.

On Wednesday, GCT had one vessel 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 before. During this period, 207 trucks were processed at a TTT of ~20 minutes on the landside, while 390 TEUs and six reefers were handled across the quay on the waterside. Stack occupancy was recorded at 41% for the general stack, 13% for reefers, and 47% for reefer ground slots.

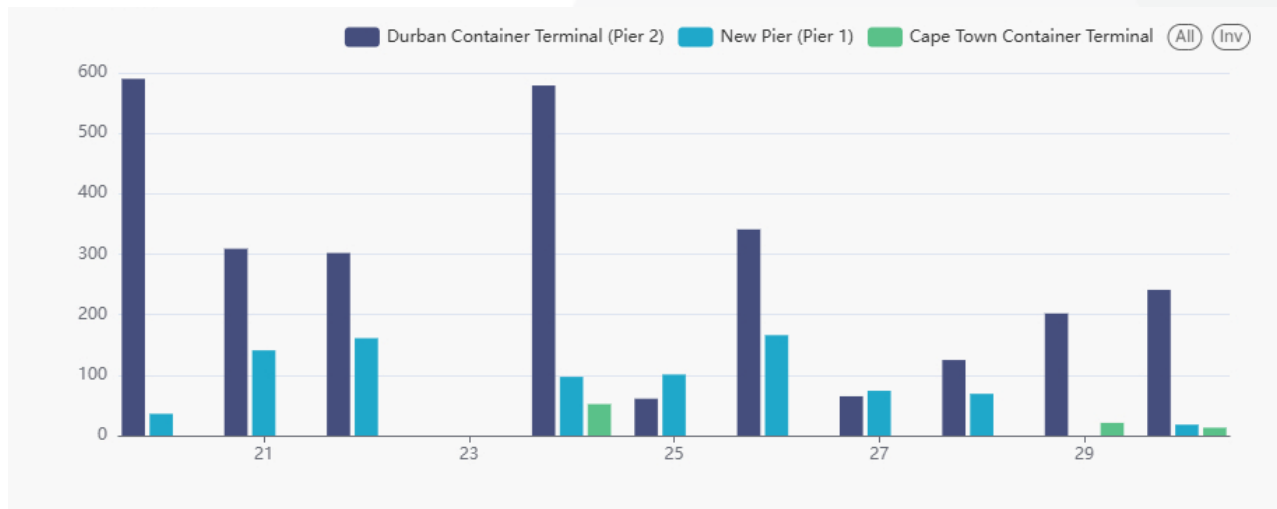
The latest reports from Maersk suggest that the ONE Responsibility/251N will call PECT for full discharge due to expected delays at NCT due to bad weather. She will sail to Durban from PECT as her onward schedule into Durban and Cape Town remains unaffected. The Cape Town Import Cargo coming off the Santa Isabel which was planned to load on the ONE Responsibility will now connect to the Santa Clara/251N.

On Wednesday, the Ro-Ro terminal had zero vessels on berth and none at outer anchorage. In the 24 hours prior, the terminal managed to handle 867 units on the waterside, resulting in a stack occupancy figure of 7%.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest that a container train derailed on the line near Dassenhoek and Cato Ridge on Saturday morning. As a result, rail operations in and out of Durban were affected. The line between Durban and Pietermaritzburg was still closed on Wednesday, with repairs ongoing. Towards the end of the week, DCT Pier 2 had 327 ConCor units on hand with a dwell time of 10 days and 314 over-border units with a dwell time of 60 days.

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



Source: Calculated using data from Transnet, 2024. Updated 04/05/2025.

In the last week (28 April to 4 May), rail cargo on the ConCor line out of Durban was reported at **1 922** containers, down **↓32%** from the previous week's **2 819** containers.

vii. General Update: Equipment and THC for Mozambican ports

During Monday's BUSA/Transnet engagement, encouraging progress was reported, with meaningful advances in equipment refurbishment and replacement across the port system. Nationwide, a total of 45 new RTGs are being rolled out, with Pier 1 having received five to date and another four due to become operational by the end of May. With an operational requirement of 16 RTGs at Pier 1, a further seven units are expected later this year, which will bring the terminal's fleet up to optimal levels with entirely new equipment. Additionally, four new ship-to-shore cranes are set to come online at DCT's South Quay during the course of 2025. Refurbishment efforts are also ongoing at CTCT, NCT, and various bulk terminals, while haulier and forklift deliveries continue apace across the network. Looking ahead, six new STS cranes are on order for Pier 1, earmarked for delivery in 2027/2028. These developments signal a welcome shift in momentum and feed renewed optimism into the logistics system.

This week, Maersk announced the adjusted Terminal Handling Charges (THC) rates per container, to and from Mozambique, taking effect from 1 June 2025. The adjusted THC rates per container can be seen in the table below:

Table 4: Maersk Terminal Handling Charges (Mozambique)

Port	Surcharge Name	Direction	Size/Type	Old Rate	New Rate
Maputo	Terminal Handling Service - Destination	Import	20' Dry	\$165	\$245
Maputo	Terminal Handling Service – Destination	Import	40' Dry	\$255	\$400
Maputo	Terminal Handling Service – Destination	Import	40' Reefer	\$485	\$495
Beira	Terminal Handling Service – Destination	Import	40' Reefer	\$290	\$320
Beira	Terminal Handling Service – Origin	Export	40' Reefer	\$290	\$320

Source: Maersk

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 21 April. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in April 2024 averaged ~812 087 kg daily.

Table 5 – International inbound and outbound cargo from OR Tambo

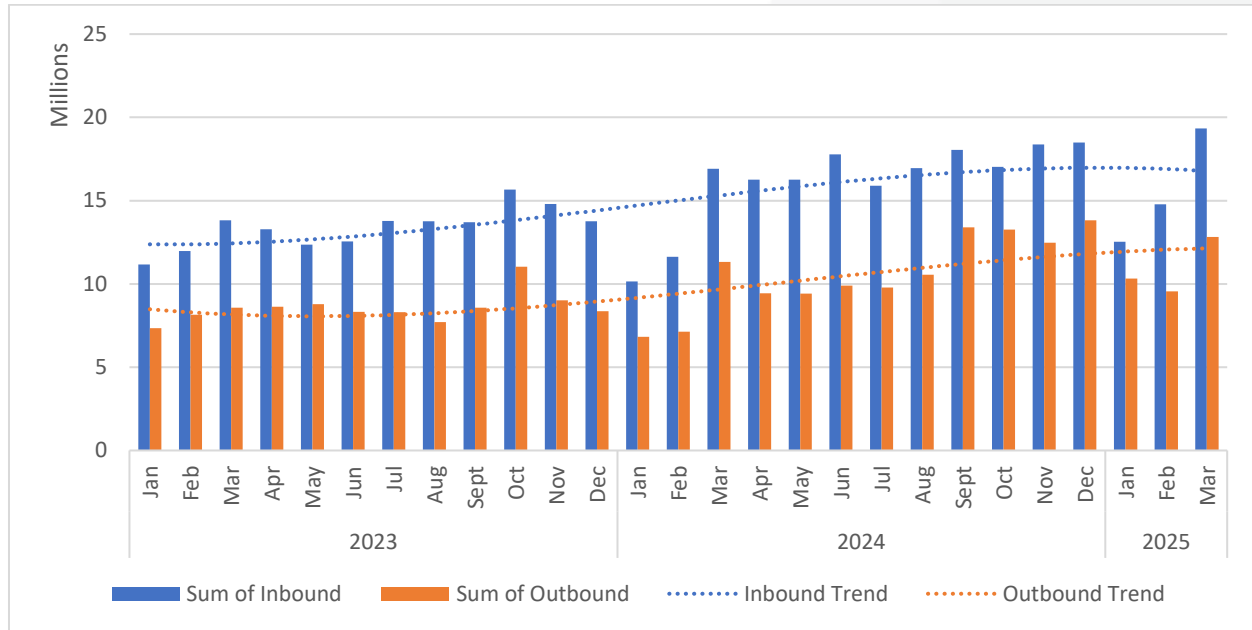
Flows	21-Apr	22-Apr	23-Apr	24-Apr	25-Apr	26-Apr	27-Apr	Week
Volume inbound	317 060	189 006	278 026	279 336	291 745	312 159	1 600 105	3 267 437
Volume outbound	88 175	80 282	117 778	130 611	158 642	155 398	1 350 766	2 081 652
Total	405 235	269 288	395 804	409 947	450 387	467 557	2 950 871	5 349 089

Courtesy of ACOC. Updated: 04/05/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to 466 777 kg inbound (↓12%, w/w) and 297 379 kg outbound (↓5%). The week marked a second consecutive decrease in international volume. Consequently, the current volumes are slightly down on last year's levels (↓6%, y/y) and significantly below the comparative levels of pre-pandemic 2019 (↓22%).

The following figure shows the air cargo flows to and from ORTIA since the start of 2023, with the uptick evident:

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



Calculated from ACOC. Updated: 04/05/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (28 April to 4 May), cargo movements along the N4 corridor remained steady, with only minor disruptions reported. The following notes summarise the recent developments:

- Truck volumes at **1 350 HGVs per day** (↓1%, w/w).
- There was a reduced average of **2,4 hours'** (↓29%) worth of queuing time at the border, as the average processing time also decreased to around **2,2 hours** (↓29%) per crossing.
- When reported, rail to Maputo was stable at an average of **eight trains daily**.
- Sugar trains from Eswatini decreased to around **one train a day** (when reported).

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

Table 6 – 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
28-Apr-25	1 126	1 035	972	116	21	41	40	258	1	*	1	*
29-Apr-25	1 074	1 071	777	207	7	62	18	231	10	8	1	1
30-Apr-25	1 271	1 130	843	222	63	81	26	161	1	*	1	*
01-May-25	1 665	1 346	1 071	213	69	70	28	174	1	*	1	*
02-May-25	1 452	1 254	1 035	171	36	38	101	280	1	*	1	*
03-May-25	1 557	1 413	1 223	238	37	70	5	281	0	*	0	*
04-May-25	1 306	1 308	957	200	38	53	60	228	0	*	*	*

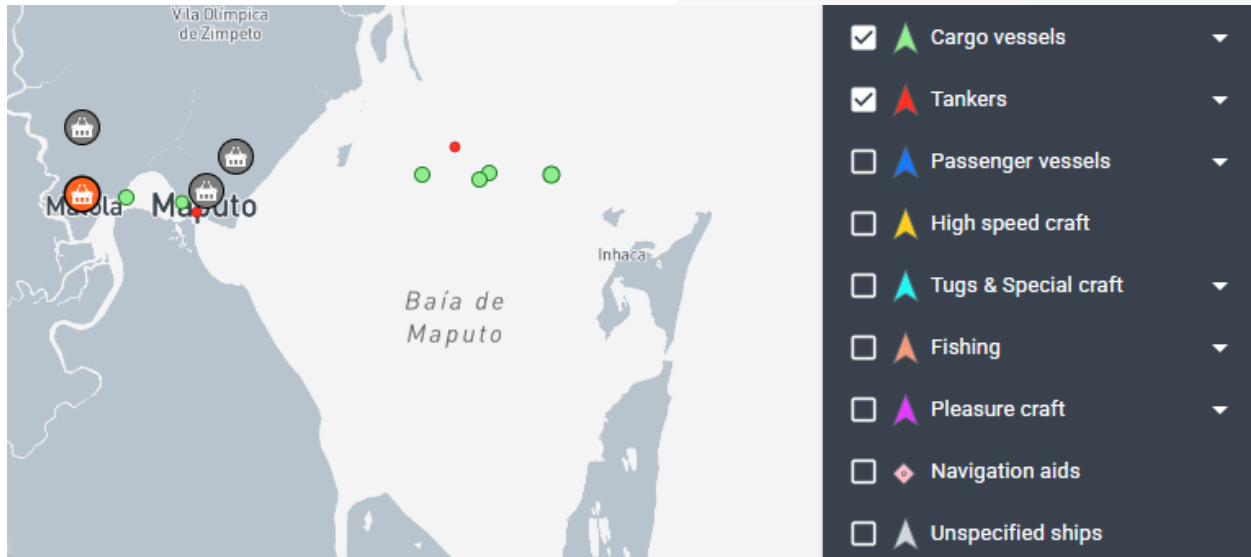
% of design capacity	90%	81%	82%	98%	n/a	119%	79%	12%	10%	80%	14%	25%
% change (d/d)	-16%	-7%	-22%	-16%	3%	-24%	1100%	-19%	n/a	n/a	n/a	n/a

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 04/05/2025.

* = not reported

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

Figure 11 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 05/05/2025 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:

- Crossing times were relatively stable this week for the rest of the SADC borders, with some decreases out of South Africa.
- Overall, the average queue times decreased by around **15 minutes** from last week, as transit times decreased by around the same magnitude.
- The median border crossing times at South African borders decreased by **four hours**, averaging **~8,5 hrs (↓32%)** for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs (no change)**.

1. Kasumbalesa Border (DRC–Zambia) constraints:

- a. Kasumbalesa continues to face congestion and infrastructure issues, prompting SADC member states to coordinate a corridor-wide intervention focusing on customs, infrastructure, and security.

2. Regional rail projects:

- a. **Ponta Railway:** Proposed 1,700 km railway connecting Botswana, Zimbabwe, and Mozambique to enhance trade.
- b. **Tanzania–Burundi SGR:** Construction of a 367 km line underway, with completion expected in six years.

- c. **TAZARA Upgrade:** Tanzania has secured \$1,4 billion from China to modernise the railway for improved efficiency and safety.

3. Zimbabwe Vehicle Inspection Department (VID):

- a. Fees for inspections and rechecks outlined (\$20–25 for initial checks, \$15–20 for rechecks).
- b. Enforcement includes warnings, repair orders, or vehicle prohibition notices (RT16).
- c. A Zimbabwean driver was fined despite holding a valid temporary driving certificate pending the SADC plastic license issuance.

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

Table 7 – Delays⁶ summary – South African borders (both directions)

Border Post	Direction	HGV ⁷ Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	SA-Zimbabwe	386	22,2	6,0	22,1	11 580	2 702
Beitbridge	Zimbabwe-SA	430	11,6	2,1	11,4	12 900	3 010
Groblersbrug	SA-Botswana	224	17,6	1,4	17,4	6 720	1 568
Martins Drift	Botswana-SA	202	4,6	0,5	4,4	6 060	1 414
Kopfontein	SA-Botswana	188	5,7	1,0	5,4	5 640	1 316
Tlokweng	Botswana-SA	15	0,5	0,2	0,3	450	105
Vioolsdrift	SA-Namibia	30	5,2	1,2	5,1	900	210
Noordoewer	Namibia-SA	20	2,1	0,5	2,0	600	140
Nakop	SA-Namibia	30	3,8	1,1	3,5	900	210
Ariamsvlei	Namibia-SA	20	1,2	0,4	1,1	600	140
Skilpadshek	SA-Botswana	232	4,0	1,5	3,6	6 960	1 624
Pioneer Gate	Botswana-SA	44	0,0	0,0	0,0	1 320	308
Lebombo	SA-Mozambique	1 361	2,4	0,4	2,2	40 830	9 527
Ressano Garcia	Mozambique-SA	1 203	1,3	0,2	1,2	36 090	8 421
Sum/Average		4 385	5,9	1,2	5,7	131 550	30 695

Source: TLC, FESARTA, & Crickmay, week ending 27/04/2025.

Table 8 – 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	14,6	2,7	14,3	9 600	2 240
Central Corridor	798	2,1	0,4	2,0	23 940	5 586
Dar Es Salaam Corridor	1 819	12,1	1,0	12,0	54 570	12 733
Maputo Corridor	2 564	1,9	0,3	1,7	76 920	17 948
Nacala Corridor	127	0,0	0,0	0,0	3 810	889

⁶ 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.

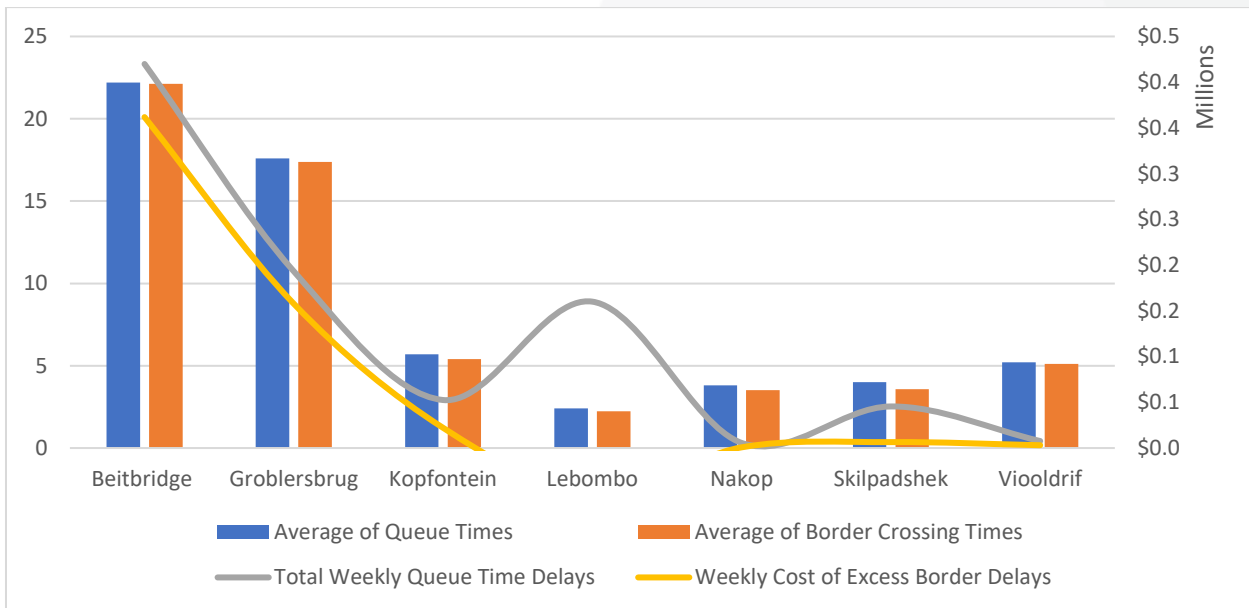
⁷ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly but rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	Est. HGV Tonnage per day	Weekly HGV Arrivals
North/South Corridor	3 517	10,3	1,3	10,2	105 510	24 619
Northern Corridor	2 817	0,7	0,1	0,7	92 520	21 588
Trans Caprivi Corridor	116	12,6	2,7	12,5	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	306	2,0	0,6	1,8	9 180	2 142
Trans Oranje Corridor	100	3,1	0,8	2,9	3 000	700
Sum/Average	12 584	5,4	0,7	5,3	385 530	89 957

Source: TLC, FESARTA, & Crickmay, week ending 27/04/2025.

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

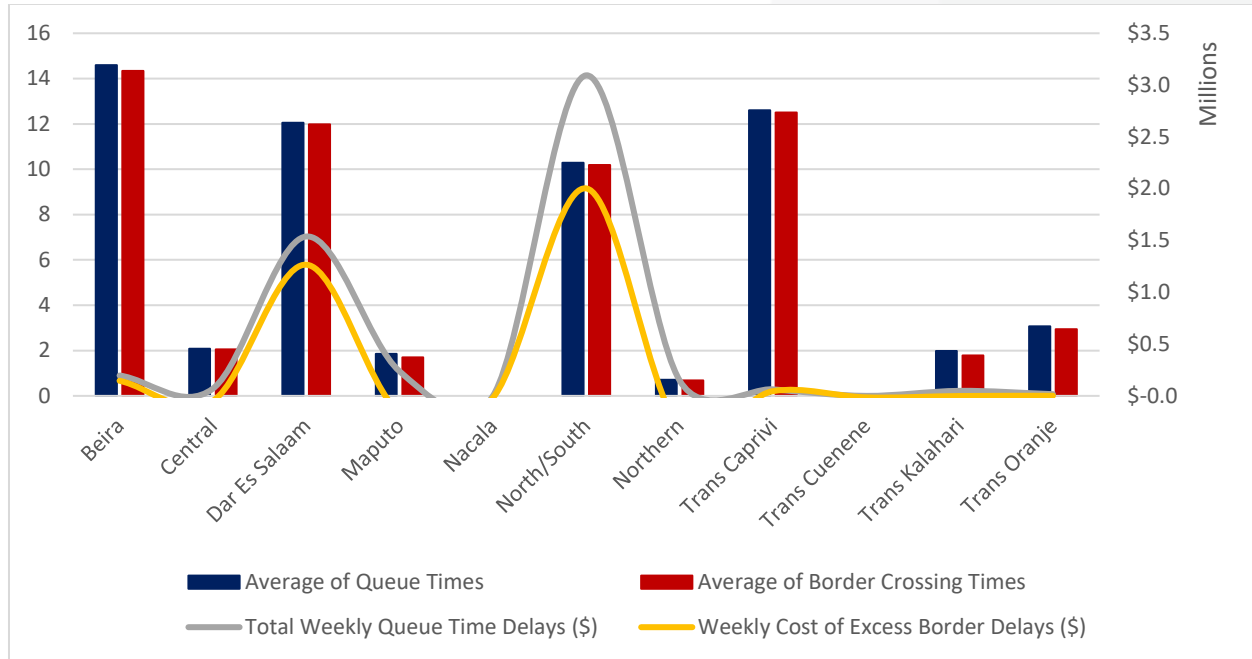
Figure 12 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & \$ millions)



Source: TLC, FESARTA, & Crickmay, week ending 27/04/2025.

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

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



Source: TLC, FESARTA, & Crickmay, week ending 27/04/2025.

In summary, cross-border queue time averaged **~5,4 hours** (down by **~0,2 hours** from the previous week's **~5,6 hours**), indirectly costing the transport industry an estimated **\$5,4 million (R101 million)**. Furthermore, the week's average cross-border transit times hovered around **~5,3 hours** (down by **~0,2 hours** from the **~5,5 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$2,9 million (R56 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$8,3 million (R156 million)**, down by **~R5 million** or **↓3%** from **~R161 million** in the previous report).

4. International Update

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

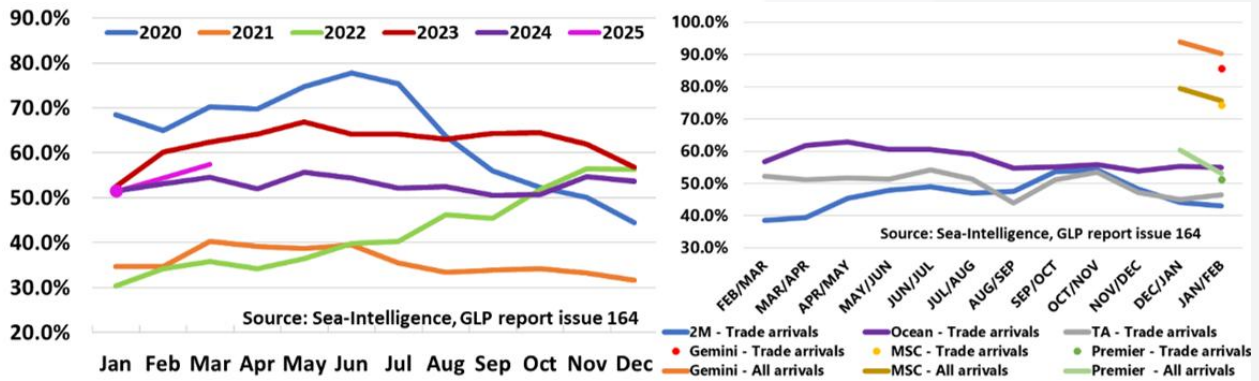
a. Global shipping industry

i. Global schedule reliability

According to *Sea-Intelligence's* Global Liner Performance (GLP) report, global schedule reliability improved for the second consecutive month in March, reaching **57,5%**—a **↑3%** increase from February.⁸ On an annual basis, the March level was also up by **↑3%**, as Maersk was the most reliable top-13 carrier at **66,9%**, followed by Hapag-Lloyd at **64,3%** and MSC at **61,9%**. The new carrier alliances—Gemini Cooperation, MSC (operating independently), and Premier Alliance—achieved notable schedule reliability as their services commenced full trade lane operations. Gemini Cooperation led with **90,3%** reliability across all arrivals and **85,7%** on trade lane arrivals, followed by MSC at **75,8%** and **74,4%**, and Premier Alliance at **53,2%** and **51,2%**, respectively.

⁸ Murphy, A. 01/05/2025. [Global schedule reliability records 2 consecutive M/M increases.](#)

Figure 14 – Global Schedule Reliability (%) and Alliance Schedule Reliability (days)

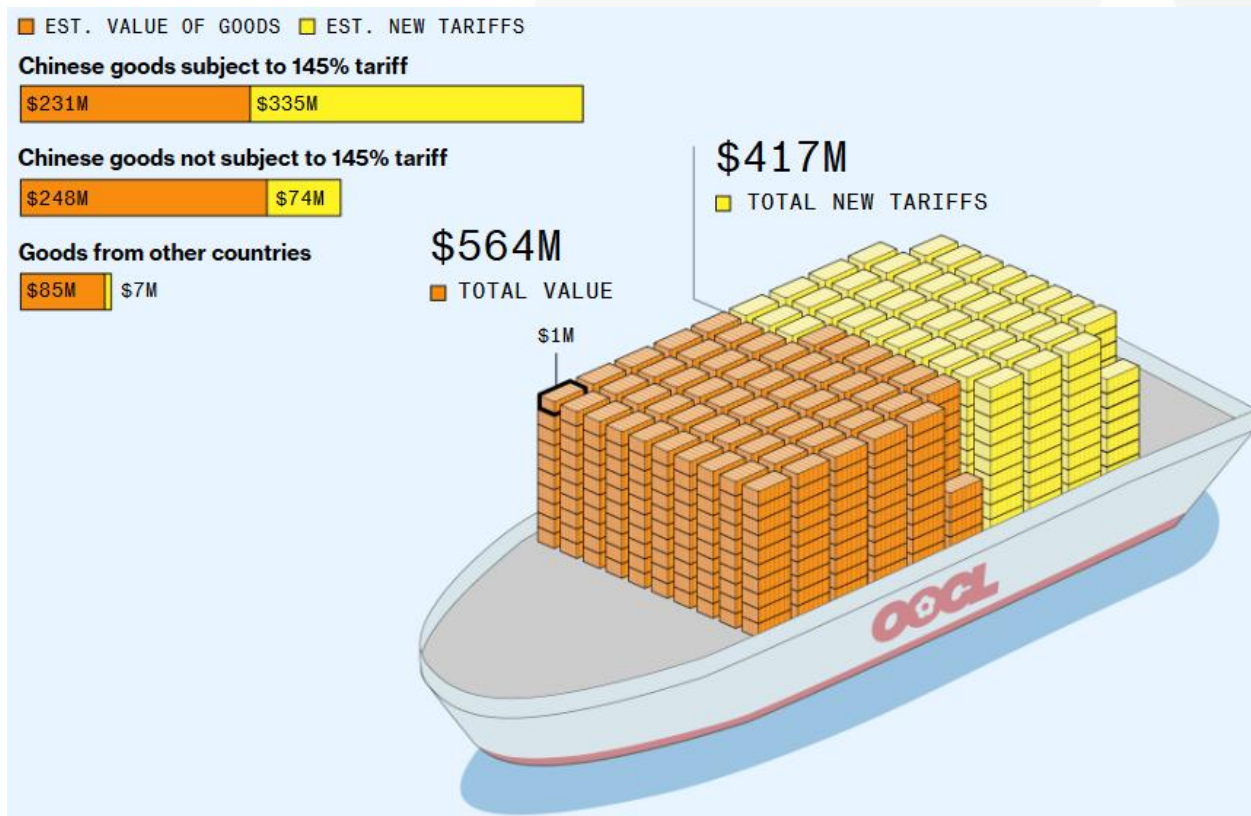


Source: [Sea Intelligence](#)

ii. US tariff costs illustration and capacity shift

The first practical evidence of the impact of US tariffs is evident this week, as the OOCL Violet arrives in Long Beach carrying thousands of Chinese goods, nearly half now subject to a steep **145% tariff**. Importers face over **\$417 million** in new duties, dramatically increasing apparel, footwear, and industrial goods costs.

Figure 15 – Estimated value of goods (left) and estimated value of new tariffs

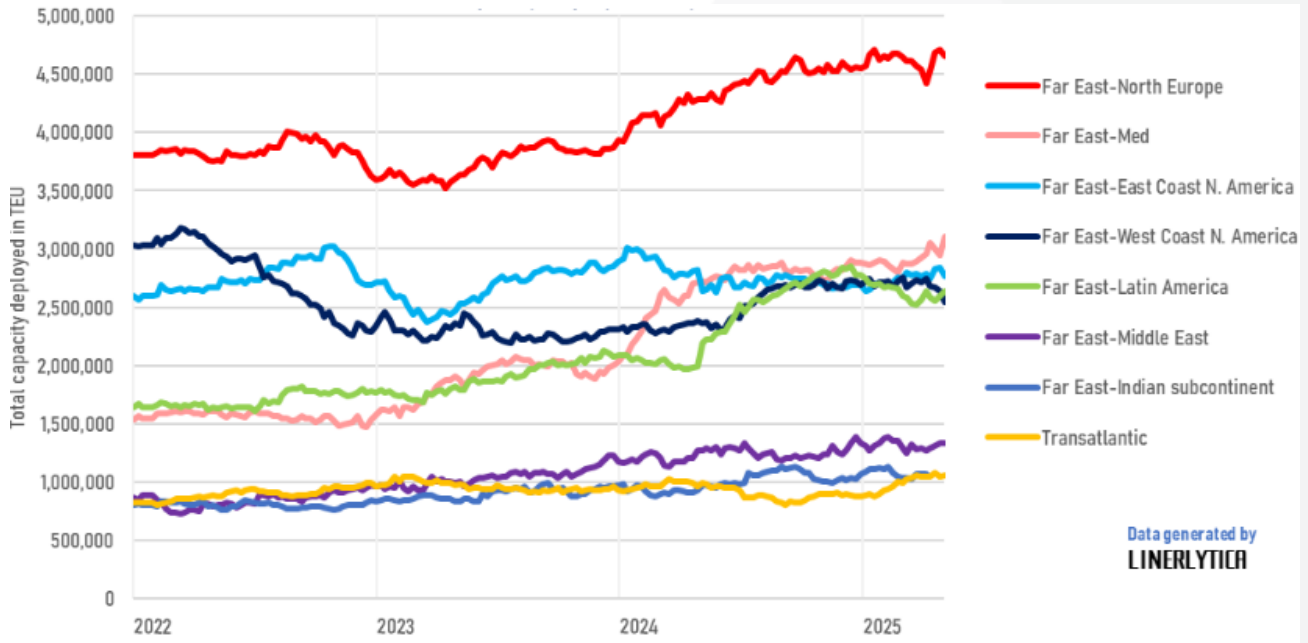


Source: [Bloomberg](#) analysis of bills-of-lading data and estimates from IHS Markit, White House tariff announcements and US Customs and Border Protection guidance

While President Trump hints at imminent trade deals with other nations, resolving the dispute with China remains elusive. Any agreements struck soon will likely serve as starting points for longer negotiations. The cargo aboard the Violet underscores the far-reaching consequences of escalating trade tensions.

Carriers have reacted swiftly to remove capacity deployed on the US trades, with **8,6%** of FE-WCNA capacity removed just 1 month after the US imposed new tariffs on its imports. A total of **27 ships** for **200 000 TEU** have been removed from the West Coast since April, with the bulk of the surplus tonnage redeployed to the Asia-Europe and Med routes:

Figure 16 – Capacity deployment by trade, 2022-2025 (TEUs)



Source: [Linerlytica](https://www.linerlytica.com)

On a carrier level, German container shipping group Hapag-Lloyd has cancelled **30%** of China-to-US-bound shipments, according to a spokesperson. Swiss forwarder Kuehne + Nagel said some trades had stopped completely, while it was expected to drop by **25%** to **30%** in bookings from China to the US. Globally, Drewry's "Cancelled Sailings Tracker" remained high and is trending around a **10% cancellation rate** of Proforma scheduling (5 May to 8 June).⁹

iii. Global freight rates

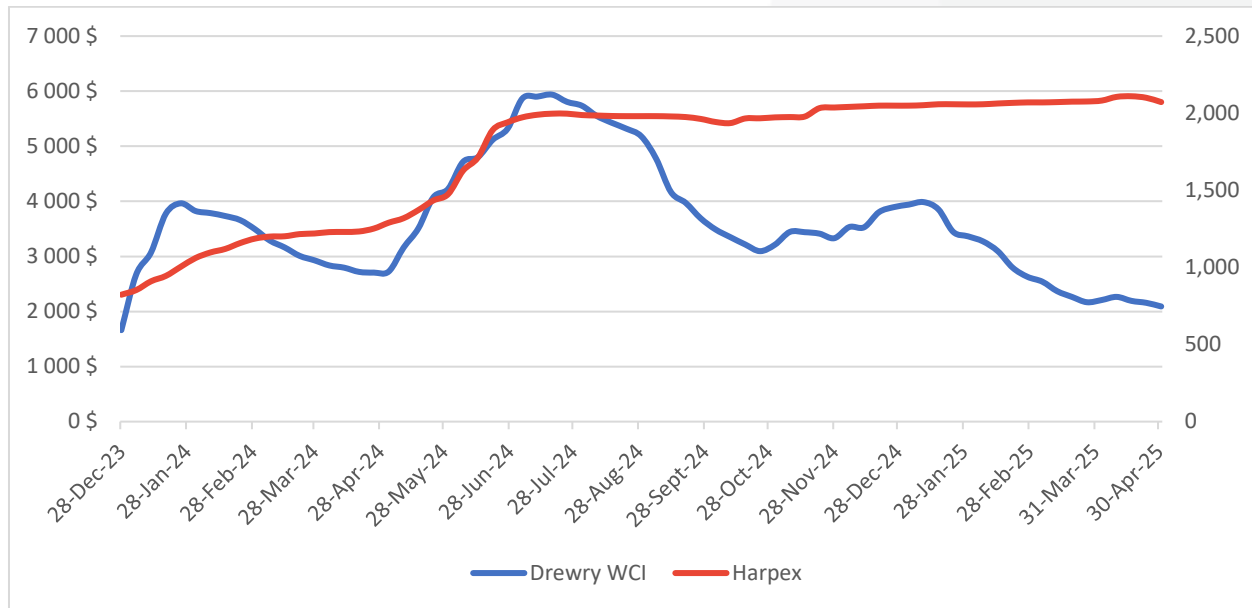
This week, Drewry's "World Container Index" again decreased, as the index dropped by **↓3,1%** (or **\$66**) to **\$2 091 per 40-ft container**¹⁰. Meanwhile, charter rates decreased for the second consecutive week, as the *Harper Petersen Index* (Harpex) traded around **2 072 points** (**↓1,3%**, w/w) on Friday.¹¹ The following figures show the two indices since the end of 2023:

⁹ Drewry. 02/05/2025. [Cancelled Sailings Tracker](https://www.drewry.com/cancelled-sailings-tracker).

¹⁰ Drewry. 01/05/2025. [World Container Index](https://www.drewry.com/world-container-index).

¹¹ Harpex. 02/05/2025. [Harper Petersen & Co Charter Rate Index](https://www.harpex.com/harper-petersen-co-charter-rate-index).

Figure 17 – World Container Index (\$ per 40ft), and Harper-Petersen Index



Source: Calculated from [Drewry](#) and [Harpex](#)

iv. Further developments of note

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

1. DSV completes DB Schenker buy as it notes strong Q1 performance by Air & Sea:

- a. Danish logistics firm DSV has finalised its **€14,3 billion** acquisition of Germany's DB Schenker, positioning itself as the world's largest freight forwarder with approximately **6–7% global market share**.¹²
- b. The completion coincided with DSV reporting a **↑4,8%** (y/y) increase in EBIT for Q1 2025, driven by strong performance in its Air and Sea division.

2. New Houthi warning to shipping as rebel group targets specific companies:

- a. The Houthi militia has escalated threats to maritime shipping by designating vessels transporting goods for specific companies, notably Boeing, as legitimate targets in the Red Sea region.¹³
- b. This move includes secondary sanctions on third-party entities engaging with the listed companies, effectively broadening the scope of potential targets and intensifying risks to global supply chains.

b. Global air cargo industry

According to IATA's latest "Air Cargo Market Analysis", global air cargo demand rebounded in March 2025, with cargo tonne-kilometres (CTKs) rising by **↑4,4%** year-on-year (y/y), recovering from February's brief downturn. Seasonally adjusted, CTKs improved by **↑3,3%** from the previous month, reflecting the usual post-holiday lift and possible frontloading activity ahead of new US tariffs. International CTKs increased by

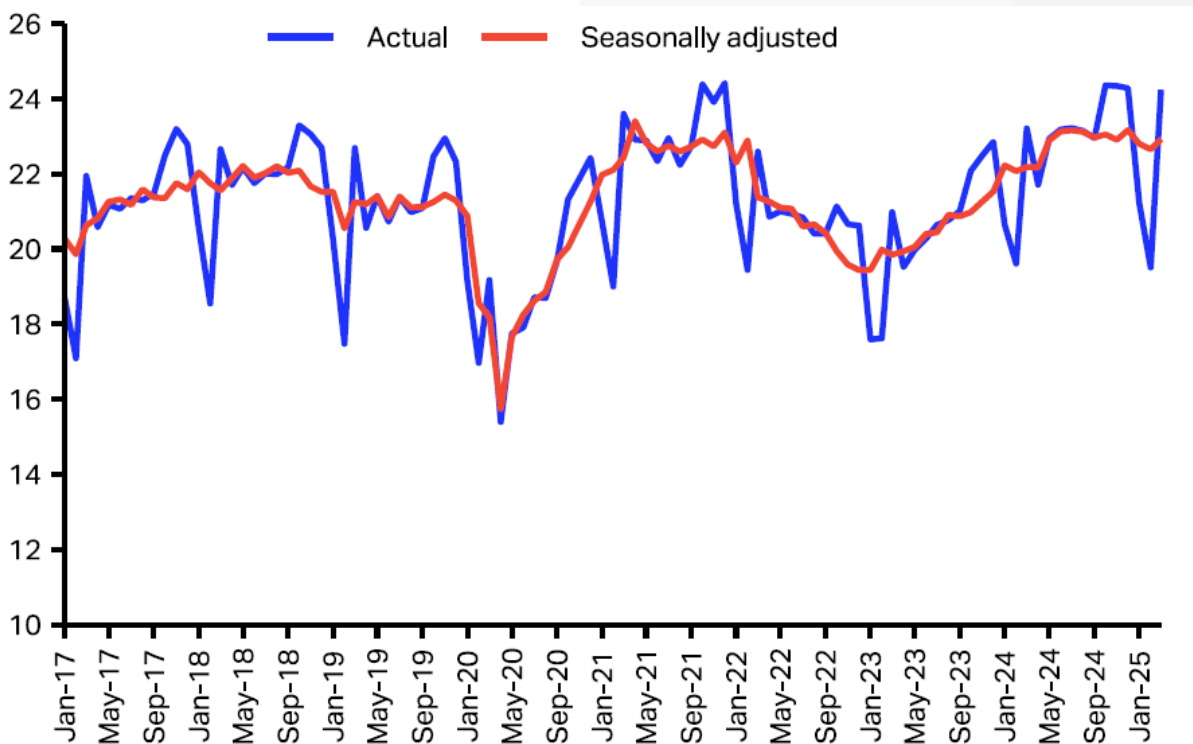
¹² Van Marle, G. 30/05/2025. [DSV completes DB Schenker buy as it notes strong Q1 performance by Air & Sea.](#)

¹³ Whiteman, A. 28/05/2025. [New Houthi warning to shipping as rebel group targets specific companies.](#)

↑5,5% (y/y), with Asia Pacific carriers again leading growth at ↑9,6%, followed by North America (↑9,5%) and Latin America (↑5,8%). Conversely, demand continued to contract for Middle Eastern (↓3,3%) and African (↓13,4%) carriers—the latter experiencing the steepest regional drop, marking the fourth consecutive month of decline. Of particular concern is the Africa-Asia trade lane, which recorded a dramatic ↓40,2% fall (y/y), indicating sustained weakness on one of Africa’s key cargo routes.

On the supply side, global air cargo capacity (Available Cargo Tonne-Kilometres, or ACTK) increased by ↑4,3% (y/y), with the Cargo Load Factor (CLF) remaining virtually unchanged at ~47,5%. However, Africa bucked the global trend, as capacity rose sharply by ↑10,8% (y/y). Regional CLF plummeted by ↓10,4% to just 37,1%—the lowest of all regions, highlighting a severe imbalance between supply and demand.

Figure 18 – Global air cargo industry CTK (billions)

























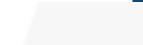
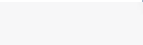
Source: [IATA](http://www.iata.org)

In terms of pricing and costs, jet fuel prices continued declining, falling by ↓17,3% (y/y), supporting a modest ↑3,8% increase in cargo yields over the same period. This marked a reversal from recent downward pressure on revenues, providing a glimmer of relief for airlines.

The continued underperformance of African carriers, especially on major intercontinental routes, underscores the ongoing challenges they face in a post-pandemic market characterised by shifting trade flows and intensified competition. This sustained decline in volumes and efficiency metrics suggests that structural and market access constraints remain unresolved, with further pressure expected should demand-side conditions not improve in the months ahead.

In the high-frequency metrics, World ACD data shows global air cargo tonnages rose ↑6% (y/y) in April, mainly driven by a ↑10% increase from Asia Pacific origins. Africa posted a modest ↑3% (y/y) rise:

Figure 19 – Regional changes in capacity, chargeable weight, and rates (weeks 2 to 5, % change)

Origin Regions last 2 to 5 weeks	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%		+1%	+0%		-2%	+7%
Asia Pacific		-0%	+3%		+1%	+7%		-5%	-0%
C. & S. America		+4%	+3%		+11%	+3%		+6%	-3%
Europe		-2%	+1%		-13%	-10%		-3%	+1%
M. East & S. Asia		-2%	+5%		+6%	+9%		-4%	-16%
North America		-0%	+1%		-11%	-4%		-1%	+0%
Worldwide		-1%	+2%		-3%	+1%		-2%	-0%

Source: [World ACD](#)

Global average rates held steady at **\$2,43/kg**, although African origin rates climbed **↑7%**. Market volatility is expected to rise following US policy changes on de minimis imports from China, impacting demand and capacity dynamics.

In other air cargo news, there were some additional noteworthy developments this week:

1. US Customs disruptions:

- a. Forecasts for air cargo growth have been significantly reduced due to economic uncertainties and the termination of the de minimis exemption, signalling heightened downside risks for the industry.¹⁴

2. E-commerce Air Traffic Impact:

- a. The end of the US *de minimis* exemption for low-value imports from China and Hong Kong is expected to cause a significant decline in e-commerce air traffic to the U.S., as shipments now face substantial tariffs and increased customs scrutiny.¹⁵

ENDS¹⁶

¹⁴ Lennane, A. 28/04/2025. [US Customs chaos means 'more downside risk than upside potential' for air cargo.](#)

¹⁵ Lennane, A. 02/05/2025. [Ecommerce air traffic to US set to grind to a halt as de minimis exemption ends.](#)

¹⁶ACKNOWLEDGEMENT:

*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 Forwarders (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.*