SAVINO DEL BENE®
Global Logistics and Forwarding Company

CARGO MOVEMENT UPDATE

Date: 18 May 2025

Key Notes

- An average of **~12 124 TEUs** was handled per day, with **~12 494 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 884** containers, down by **↓4%** from last week.
- Cross-border queue: **↑1,4 hrs**; transit: **↑1,7 hrs**; SA borders: **9,6 hrs** (**↑22%**); SADC: **4,7 hrs** (**no change**).

i. Port operations - General

- At our container terminals, an average of **12 124 TEUs** was handled daily, significantly increasing from **9 813 TEUs** the previous week.
    - For the coming week, an increased average of **~12 494 TEUs** (**↑3%**) is predicted to be handled.
- Port Operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages.
    - Equipment challenges ensured operational disruptions at the Port of Cape Town, while the main operational constraints in Durban proved to be constant equipment breakdowns, adverse weather, and network challenges.
    - Unfavourable weather, system challenges, and vacant berths mainly impacted operations at our Eastern Cape Ports, while unavailable marine equipment resulted in operational delays at the Port of Richards Bay.
- The latest reports from Maersk stipulate that the Irenes Resolve will omit the Port of Durban due to undisclosed reasons.
- In addition, the latest reports from TFR suggest that intermittent cable theft incidents remain prominent in the Capital Park area, resulting in continuous diesel hauling as a contingency measure to move cargo on the line.
- UNTU has also made its stance clear that it will not negotiate any further and will issue a 48-hour notice of industrial action should a revised wage proposal not be received from Transnet.
- Lastly, prospective improvements to the access road leading to the Durban Container Terminal are set to begin in early June, as TNPA commences a six-month rehabilitation of Bayhead Road.

ii. Port operations – Performance metrics

- CTCT stack occupancy for **GP containers was recorded at 19%**, **reefers at 39%**, and **empties at 30%**.
    - The terminal operated with **eight STS cranes**, **22 RTGs**, and **58 hauliers** towards the end of the week.
- CTCT handled an average of **~2 139 TEUs** (**↓0,5%**, w/w) containers a day, with an average of **~1 755** (**↓18%**) projected this week.
- DCT Pier 1: Stack occupancy was **57%** for **GP containers** and **87%** for **reefers**.
    - The terminal operated with **five STS cranes** and **14 RTGs** towards the end of the week.
- DCT Pier 1 handled **~1 975 TEUs** (**↑12%**, w/w) containers a day, with an average of **~2 016** (**↑2%**) projected this week.
    - The **average TTT** for the week was **~90 minutes** (**↑11%**, w/w) and an average **staging time** of **~69 minutes** (**↑19%**).
- DCT Pier 2: Stack occupancy was at **44%** for **GP containers** and **33%** for **reefers**.
- DCT Pier 1 handled **~4 552 TEUs** (**↓2%**, w/w) containers a day, with an average of **~5 258** (**↑16%**) projected this week.
    - The terminal operated with **nine gangs**.

  - For the last week, there was an **average TTT** of **~77 minutes** (**↑7%**, w/w) and a staging time of **~69 minutes** (**↑47%**).
  - 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.
  - On Monday evening (19 May), **one** container vessel was waiting outside at anchorage for Pier 1, and **one** for Point 2.
    - The queue of dry (**two**), liquid (**nine**), and breakbulk (**one**) vessels has also remained relatively similar from last week.
- 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 an average of **~2 338 TEUs** (**↑269%**, w/w) containers a day, with an average of **~2 059 TEUs** (**↓12%**) projected this week.
  - Port Elizabeth Container Terminal handled an average of **~506 TEUs** (**↑253%**, w/w) containers a day, with an average of **~454 TEUs** (**↓10%**) projected this week.
  - Other terminals handled a combined average of **~614 TEUs** (**↓31%**, w/w), with an average of **~952 TEUs** (**↑184%**) projected this week.
- At RBCT, the daily average for the week remained elevated are around **189 785 tons** (**↑7%**, w/w).
  - An average of **18 trains** (down by one from last week) were serviced on the landside, slightly below the target of 22.
- Transnet has announced preferred bidders for the **R17 billion development** of fuel terminals at Richards Bay, aiming to enhance South Africa's fuel import and export capabilities.
  - This strategic initiative is part of Transnet's broader plan to modernise port infrastructure and improve energy security.
- In the last week (*12 to 18 May*), rail cargo on the ConCor line out of Durban was reported at **2 884** containers, down **↓4%** from the previous week's **3 041** containers.

iii. TNPA: April update

TNPA has released consolidated port statistics for April, with significant drop-offs in monthly performance across the respective sub-sectors:

- Containers decreased monthly by **↓27%** (m/m), but were stable annually by **↑0,1%** (y/y).
- Total bulk cargo decreased monthly by **↓22%** (m/m), but increased annually by **↑3%** (y/y).
- Vehicles decreased monthly by **↓33%** (m/m) and annually by **↓9%** (y/y).
- Transnet Port Terminals handled less than **300 thousand containers** and **17 million metric tonnes** of **bulk** cargo during April, significantly less than the **400 thousand containers** and **21,2 million metric tonnes** of **bulk** last month.
- Containers exported (**↑14%**), dry bulk (**↑6%**), and liquid bulk (**↑4%**) are all up versus last year, as is the total year-to-date bulk cargoes (**↑9%**).
  - In fact, the year-to-date bulk cargoes to April are at the highest level since 2020 and trail 2019 by only **↓6%**, so it is clear that some progress is being made.
- Unfortunately, for containers, the story is not similar, which is illustrated by the following year-to-date for containers to April.
  - Containers are down versus last year (**↓2%**) and **↓4%** below 2019 levels.
  - The current YTD is at least above 2023 and the pandemic-induced year 2020.

iv. Lebombo update

In the last week (*12 to 18 May*), cargo movements (road and rail) along the N4 corridor increased for rail and dropped only slightly for road. The following notes summarise the recent developments:

- Truck volumes at **1 420 HGVs per day** (**↓4%**, w/w).
- There was a slightly increased average of **2,8 hours**' (**↑22%**) worth of queuing time at the border, as the average processing time also increased – to around **2,5 hours** (**↑14%**) per crossing.
- The rail to Maputo increased to an average of **nine trains daily** (up by **two**).
- Sugar trains from Eswatini were stable at around **two trains a day**.
- Several noteworthy developments this week include the following:
  - The South African side of the corridor continues to deteriorate, with potholes pushing heavy vehicles into oncoming lanes, raising safety and congestion concerns.
  - Ongoing vandalism of solar lighting has created hazardous nighttime conditions. Criminals are exploiting the darkness to target stationary truck drivers.
  - Customs authorities at Ressano Garcia are maintaining their policy of escorting fuel tankers in convoys. While aimed at safety, the measure is significantly contributing to border congestion.

v. Local and cross-border road:

- Overall, the average queue times increased by around **an hour and a half** from last week, as transit times increased by around **an hour and three-quarters**.
- The median border crossing times at South African borders increased by **an hour and three-quarters**, averaging **~9,6 hrs** (**↑22%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**).

1. **South Africa (Bushbuckridge/Dwarsloop) on route to Mozambique:**
   a. Criminal activity escalated with roads being blocked using hijacked trucks.
   b. Two additional vehicles were seized near the new garage, worsening disruptions around the traffic light junction.
2. **South Africa (Freight SA Gatehouse):**
   a. Scheduled network cabinet maintenance on Tuesday, 13 May (01h00–04h00) temporarily halted traffic in both directions.
   b. Operations resumed immediately thereafter.
3. **Zambia (near Livingstone):**
   a. An incident involving the confiscation of a Zimbabwean driver's license and keys at a checkpoint was reported.
   b. Following intervention by FESARTA, the items were returned, but the case underscores ongoing governance and procedural challenges.
4. **Zimbabwe:**
   a. A transition from metal discs to plastic driver's licenses is underway.
   b. Mandatory retesting will soon be introduced to verify driver identity and competence, potentially impacting freight operators employing Zimbabwean drivers.

- In summary, cross-border queue time averaged **~5,3 hours** (up by **~1,4 hours** from the previous week's **~3,9 hours**), indirectly costing the transport industry an estimated **$5,3 million** (**R96 million**). Furthermore, the week's average cross-border transit times hovered around **5,5 hours** (up by **~1,7 hours** from the **~3,8 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,1 million** (**R56 million**). As a result, the total indirect cost for the week amounts to an estimated **~$8,4 million** (**R152 million**, up by **~R49 million** or **↑48%** from **~R103 million** in the previous report).

vi. Global shipping industry

- The latest container throughput figures for March from *Container Trade Statistics* (CTS) show that container volume had its typical cyclical rebound after the Chinese New Year, as global throughput to March increased by a substantial **↑22%** (m/m).
- Furthermore (and more indicative of the cyclical flow), throughput is up by **↑6,5%** (y/y) annually.
    - All trade lanes experienced significant increases in February, with Far East exports the most significant at **↑29%** (m/m) and European imports at **↑27%**.
    - Similar to the ongoing observations in the container spot rates, the global price index (dry and reefer combined) decreased in March by **↓4,8%** monthly and **↓5,9%** yearly.
- Container throughput in February reached **16,2 million TEUs** – only **5 000 containers** below the record level of December 2024, indicating the strong containerised demand despite some significant headwinds in the global market.
    - Concerning current demand, the 90-day Sino-US tariff truce has triggered a substantial rebound in transpacific cargo bookings and a sharp rise in freight rates, with further rate increases scheduled from 1 June.
- Sub-Saharan African trade over the same period, with a **↑23%** (m/m) increase in containers imported, and a **↑14%** growth in containers exported.
    - Yearly SSA imports are also up (**↑9,3%**, y/y) – with exports down by **↓1,4%** (y/y). When adding South Africa's share to SSA trade, we see a continuation of the general flow, as Transnet registered good cyclical throughput numbers in March (**399 631 TEUs**):
    - When measuring these, South Africa accounted for approximately **24%** of SSA imports and **61%** of SSA exports in March, according to TNPA figures.
    - These respective shares are significantly less than the highs of **35%** in February 2022 for imports and **82%** in September 2022 for exports.
- After four consecutive weeks of reductions, the Drewry's "*World Container Index*" again increased, as the index jumped by a significant **↓7,6%** (or **$157**) to **$2 233 per 40-ft container**.
- Meanwhile, charter rates were stable, as the *Harper Petersen Index* (Harpex) traded around **2 055 points** (**no change**) on Friday.

vii. South African air industry

- In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **503 638 kg** inbound (**↓3%**, w/w) and **334 001 kg** outbound (**↑17%**).
    - After a couple of weeks of reduced air cargo throughput, the industry saw a good recovery, led by exports.
    - Consequently, the current volumes have caught up to last year's levels (**↑1%**, y/y), but remain slightly below the comparative levels of pre-pandemic 2019 (**↓11%**).

viii. International air industry

- In the high-frequency metrics, World ACD data shows that the global air continues to weaken, with chargeable weight down **↓1%** week-on-week and **↓3%** on a two-week-over-two-week (2w/2w) basis.
    - The drop in demand follows the end of the US *"de minimis"* exemption for Chinese imports under **$800**, effective 2 May.

- Reflecting these trends, the global average airfreight rate fell to **$2,34 per kg**, down **↓2%** (w/w) and 3% (y/y), marking the fourth consecutive weekly decline.
- Looking ahead, the 90-day suspension of elevated US tariffs could prompt renewed demand via air, although increased customs scrutiny for non-postal shipments may limit this.