SAVINO DEL BENE®
Global Logistics and Forwarding Company

CARGO MOVEMENT UPDATE

Date: 4 May 2025

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 air cargo demand rebounded in March, rising by **↑4,4%** (y/y) with most regions recording gains.

i. Port operations - General

- At our container terminals, an average of **11 722 TEUs** was handled per day, representing an increase from **11 783 TEUs** the previous week.
  - For the coming week, an increased average of **~12 494 TEUs** (**↑7%**) is predicted to be handled.
- 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.

ii. Port operations – Performance metrics

- CTCT stack occupancy for **GP containers was recorded at 35%**, **reefers at 12%**, and **empties at 52%**.
  - The terminal operated with **seven STS cranes**, **22 RTGs**, and **58 hauliers** towards the end of the week.
- CTCT handled an average of **~2 102 TEUs** (**↓18%**, w/w) containers a day, with an average of **~1 755** (**↓17%**) projected this week.
- DCT Pier 1: Stack occupancy was **31%** for **GP containers**.
  - The terminal operated with **four STS cranes** and **14 RTGs** towards the end of the week.
- DCT Pier 1 handled **~2 202 TEUs** (**↑20%**, w/w) containers a day, with an average of **~2 016** (**↓8%**) projected this week.

  - The **average TTT** for the week was **~80 minutes** (**↓32%**, w/w) and an average **staging time** of **~54 minutes** (**↓45%**).
- DCT Pier 2: Stack occupancy was at **54%** for **GP containers**.
  - The terminal operated with **11 gangs**.
  - 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. DCT Pier 2 handled an average of **~4 675 TEUs** (**↑13%**, w/w) containers a day, with an average of **~5 258 TEUs** (**↑12%**) projected this week.
  - For the last week, there was an **average TTT** of **~72 minutes** (**↓12%**, w/w) and a staging time of **~47 minutes** (**↓35%**).
    - 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.
  - 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.
- 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 **~1 677 TEUs** (**↓15%**, w/w) containers a day, with an average of **~2 059 TEUs** (**↑23%**) projected this week.
  - Port Elizabeth Container Terminal handled an average of **~379 TEUs** (**↑4%**, w/w) containers a day, with an average of **~454 TEUs** (**↑20%**) projected this week.
  - Other terminals handled a combined average of **~687 TEUs** (**↓26%**, w/w), with an average of **~952 TEUs** (**↑38%**) projected this week.
- At RBCT, 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.
- 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.

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:

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

iii. Lebombo 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).

iv. Local and cross-border road:

- 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.

- 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.

v. Global shipping industry

- 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.
    - 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 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.
- 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:
- 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.
- Drewry's "*Cancelled Sailings Tracker*" remained high and is trending around a **10% cancellation rate** of Pro-forma scheduling (5 May to 8 June).
- 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**. 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.
- Further developments include **(1)** DSV completing its **€14,3 billion DB Schenker acquisition** and **(2)** Houthi rebels targeting vessels linked to specific companies.

vi. South African air industry

- 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%**).

vii. International air 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.
- 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).
- 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.
- 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.