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Cargo Movement Update #235[1]

Date: 25 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)	33 578	38 255	**71 833**	39 671	45 196	**84 867**	↓15%
Air Cargo (tons)	4 021	2 704	**6 726**	3 525	2 338	**5 863**	↑15%

Monthly Snapshot

Figure 1 – Cyclical[4] monthly cargo volume, year on year (most metrics: Apr '24 vs Apr '25, % growth)

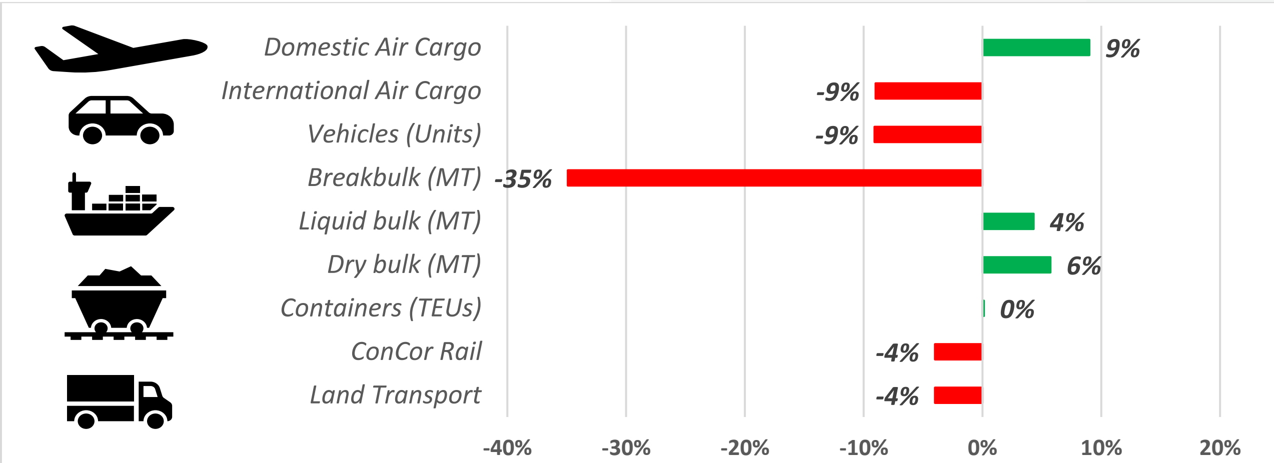
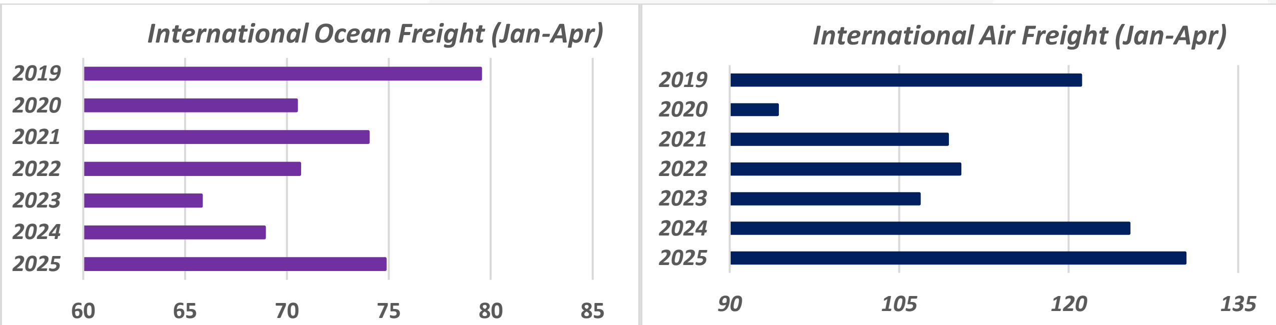


Figure 2 – Year-to-date flows 2019-2025[5]: ocean, y/y (million metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~10 262 TEUs** was handled per day, with **~12 275 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **2 415** containers, down by **↓24%** from last week.
- Cross-border queue: **↓0,3 hrs**; transit: **↓0,6 hrs**; SA borders: **9,9 hrs** (**↑3%**); SADC: **4,7 hrs** (**no change**).
- MSC announced the continuation of its AMEX service connecting South Africa and the United States.
- Global spot rates increased by **↑1,9%** (or **$43**) to **$2 276 per /40'**; charter rates jumped by **↑2,3%**.
- Global air cargo tonnages rose sharply by **↑6%** (w/w), as spot rates increased to **$2,50/kg** (**↑2%**).

[1] This weekly report contains an overview of air, sea, and road freight to and from South Africa. It is the *235th* 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: Apr vs Apr.
[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 **10 262 TEUs** was handled daily, decreasing from **12 124 TEUs** the previous week. Port Operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages. Adverse weather conditions ensured operational disruptions at the Port of Cape Town, while the main operational constraints in Durban proved to be continuous equipment breakdowns, adverse weather, and network challenges. Unfavourable weather and vacant berths mainly impacted operations at our Eastern Cape Ports, while inclement weather also resulted in operational delays at the Port of Richards Bay. The latest reports from Maersk suggest that the Mehuin and Santa Teresa are running late into South Africa due to Congestion in Europe and bad weather en route. The latest reports from TFR indicate that a power station issue near Ladysmith ensured delays of up to 18 hours on the ConCor line between Tuesday and Wednesday. Furthermore, the latest reports from TNPA suggest that the CCMA Commissioner issued a detailed report on Tuesday evening (20 May), regarding the wage dispute between UNTU and Transnet, for all stakeholders to analyse and digest.

Lastly, in some very encouraging news this week, MSC announced the continuation of its AMEX service connecting South Africa and the United States, providing a critical anchor for direct maritime trade amid declining liner connectivity and rising global uncertainty. This development brings much-needed clarity for local shippers and cargo owners and signals renewed confidence in South Africa's strategic relevance as a trading partner.

Globally, the transpacific container shipping market is experiencing a significant capacity rebound, with weekly Asia–US departures set to exceed **560 000 TEU**, up sharply from **377 000 TEU**. This recovery is driven by carriers reinstating suspended sailings, deploying extra loaders, and new entrants like China United Lines. Maersk and Hapag-Lloyd's new Gemini Cooperation service offers faster transit times and signals confidence in sustained demand. Charter rates have risen sharply as carriers scramble for vessels, while global port congestion is affecting **6,8% of fleet capacity**. European ports face **5–6 days' delays** amid **labour shortages** and **low water levels**. Freight rates are rising, especially on transpacific lanes, though a return to pandemic-era highs is unlikely. Freight rates and charter rates shot up this week. Further developments include **(1)** WiseTech's **$2,1bn acquisition** of **E2open** signals global supply chain ambitions, and **(2)** crew saved as MSC box ship sinks off Indian coast.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **574 466 kg** inbound (**↑14%**, w/w) and **386 001 kg** outbound (**↑16%**). The healthy increase means the current volumes are significantly up on last year's levels (**↑15%**, y/y), and above the comparative levels of pre-pandemic 2019 (**↑2%**). This week, the freight industry, led by SAAFF and ACOC, strongly opposed the abrupt e-hailing ban at ORTIA's Cargo Terminal, urging its reversal and calling for a consultative, evidence-based review process that balances fair access with targeted security. Internationally, global air cargo tonnages rose **↑6%** in week 20 and spot rates increased **↑2%**, driven by a strong post-holiday rebound from Asia Pacific and the partial easing of US-China trade restrictions.

Cargo movements along the N4 corridor increased slightly for road and were stable for rail, with truck volumes at **1 430 HGVs per day** (**↑1%**, w/w). There was a slightly increased average of **3,1 hours**' (**↑11%**) worth of queuing time at the border, as the average processing time also increased – to around the same time of **3,1 hours** (**↑24%**) per crossing. The rail to Maputo decreased to an average of **seven trains daily** (down by **two**). Sugar trains from Eswatini were stable at around **two trains a day**.

Crossing times decreased slightly at several borders this week but remained relatively stable throughout the SADC region. Overall, the average queue time decreased by around **20 minutes** from last week, while transit time decreased by around **half an hour**. The median border crossing times at South African borders increased by **20 minutes**, averaging **~9,9 hrs** (**↑3%**) 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 around a day to cross last week, namely Groblersbrug, Kasumbalesa (the worst affected, with an average of nearly **two days** from **both the Zambian and DRC sides**), and Katima Mulilo. Other developments include **(1)** Groblersbrug delays, **(2)** an accident at Chinhoyi slowing traffic flows, **(3)** toll fee expansions between Zambia and the DRC, **(4)** CBRTA system issues, and **(5)** Namibia bans chicken imports from Brazil.

In summarising this week's edition, our attention is drawn to Finance Minister Godongwana's budget, with significant attention given to freight and logistics. Over **R400 billion** has been allocated to the transport and logistics sector, with specific provisions for road maintenance, rail infrastructure renewal, and public-private partnerships. This includes **R93 billion** for SANRAL, **R53 billion** for provincial roads, and **R66 billion** for PRASA – an investment to restore affordable commuter services. The Minister also confirmed consideration for government guarantee support to Transnet, which has since materialised through Minister Creecy’s **R51 billion guarantee facility** to stabilise Transnet’s capital programme and enable reform implementation. These developments intend to address structural inefficiencies and restore critical freight corridors. While implementation challenges persist, this renewed fiscal commitment and expanded private sector participation are pivotal in revitalising South Africa’s trade-enabling infrastructure and improving logistics performance over the medium term.

Contents

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 19 to 25 May (measured in TEUs)

7-day flow reported (19/05/2025 – 25/05/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 009	35 061	↑10%
New Pier (Pier 1)	1 229	8 604	↓38%
Cape Town Container Terminal	1 341	9 384	↓37%
Ngqura Container Terminal	1 535	10 748	↓34%
Port Elizabeth Container Terminal	469	3 280	↓7%
Other	679	4 756	↑11%
Total	**10 262**	**71 833**	↓15%

Source: Calculated from TPT, 2025. Updated 25/05/2025.

A decreased average of **~10 262 TEUs** (↓15%) was handled per day for the last week (*19 to 25 May, Table 2*), significantly below the projected average of **~12 494 TEUs** (↓18% actual versus projected).

For the coming week, an increased average of **~12 275 TEUs** (↑20%) is predicted to be handled (*26 May to 1 June, Table 3*). This week, Port Operations were characterised by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages.

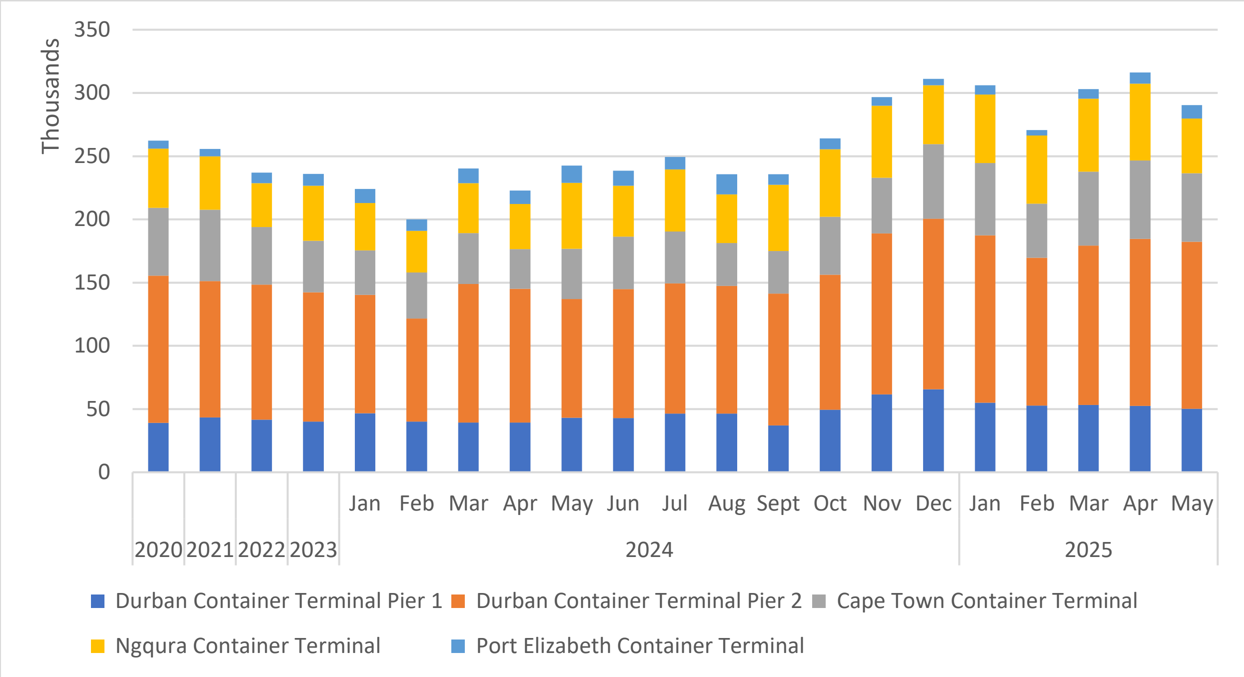
Table 3 – Container Ports – Weekly flow projected for 26 May to 1 June (measured in TEUs)

7-day flow projected (26/05/2025 – 01/06/2025)			
Terminal	**Daily average**	**Weekly total**	**% (w/w)**
Durban Container Terminal (Pier 2)	5 208	36 459	↑4%
New Pier (Pier 1)	1 996	13 975	↑62%
Cape Town Container Terminal	1 698	11 887	↑27%
Ngqura Container Terminal	2 064	14 447	↑34%
Port Elizabeth Container Terminal	444	3 110	↓5%
Other	864	6 047	↑27%
Total	**12 275**	**85 925**	↑20%

Source: Calculated from TPT, 2025. Updated 25/05/2025.

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.

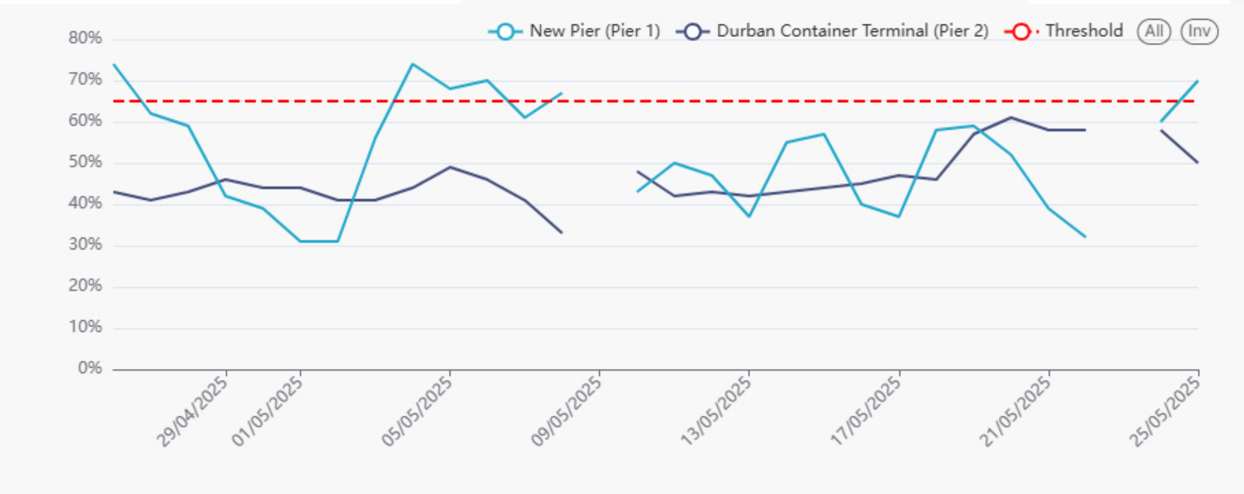
Figure 3 – Monthly flow reported for total container movement (thousands 2020 to present, m/m)



Source: Calculated from TPT, 2025, and updated 25/05/2025.

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

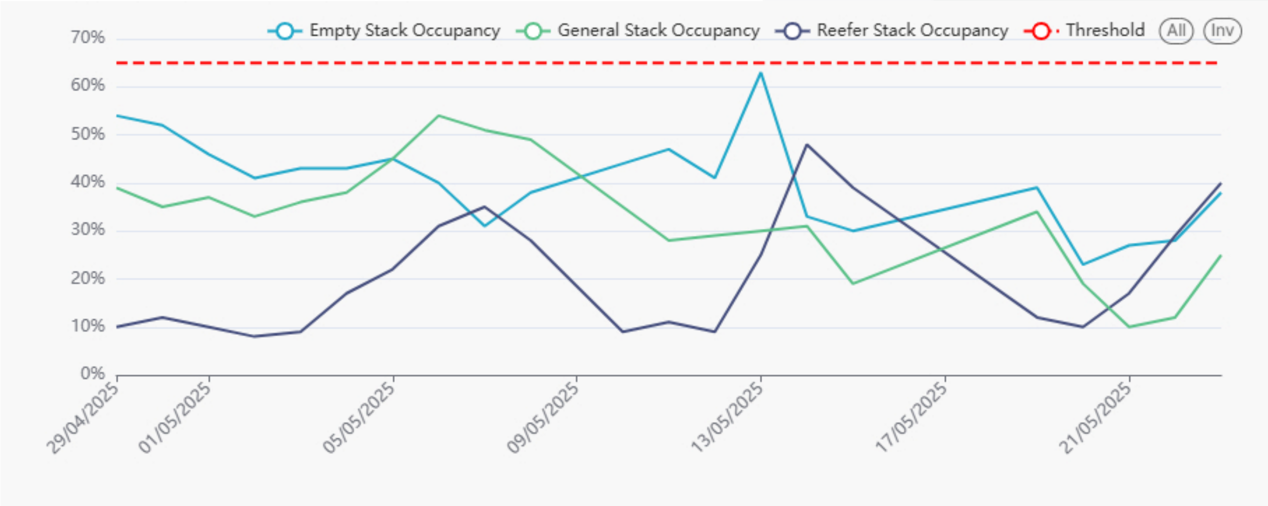
Figure 4 – Stack occupancy in DCT, general-purpose containers (29 April to present; day on the day)



Source: Calculated using data from Transnet, 2025, and updated 25/05/2025.

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 (29 April to present, day on day)



Source: Calculated using data from Transnet, 2025, and updated 25/05/2025.

b. Summary of port operations

i. Weather and other delays

- Adverse weather conditions ensured operational disruptions at the Port of Cape Town.
- The main operational constraints in Durban proved to be continuous equipment breakdowns, adverse weather, and network challenges.
- Adverse weather and vacant berths mainly impacted our Eastern Cape Ports operations.
- Inclement weather resulted in operational delays at the Port of Richards Bay.

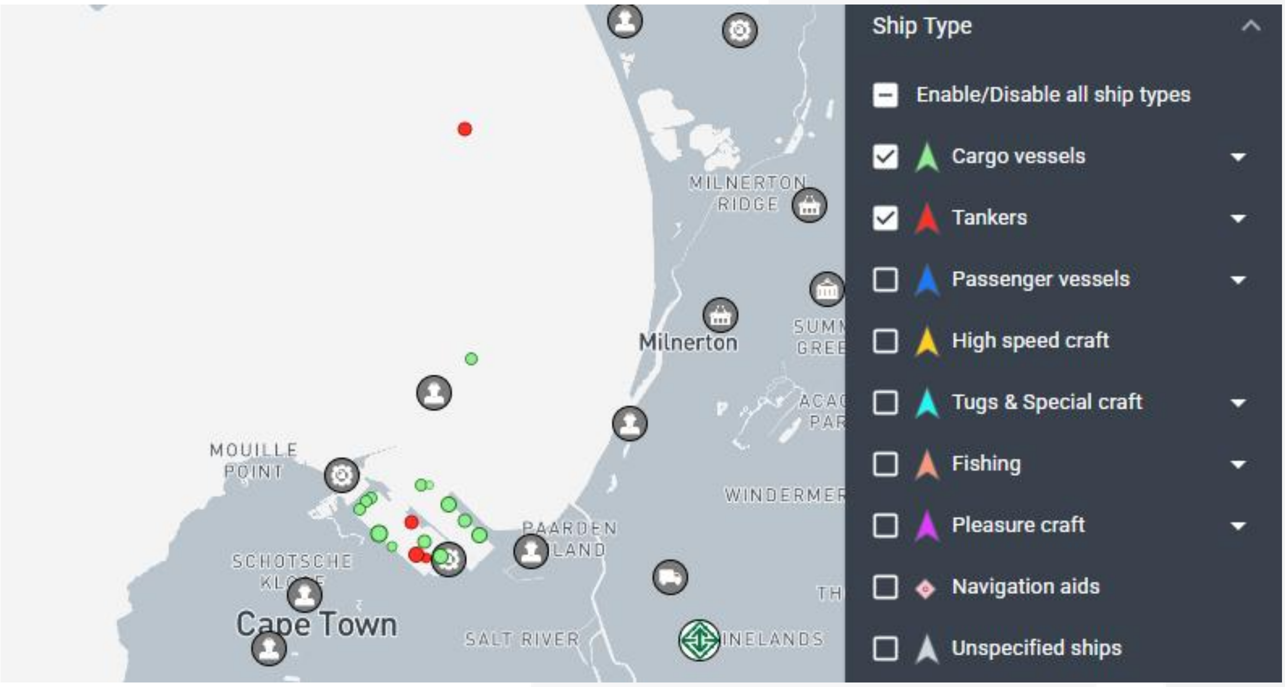
ii. Cape Town

On Friday, CTCT recorded one vessel at berth and zero at anchor, as adverse weather proved to be the primary operational constraint. On the landside, between Monday and Thursday, the terminal managed to service at least 3 780 trucks while handling approximately 121 rail units. On the waterside, the terminal executed approximately 3 231 container moves across the quay during the same period. Stack occupancy for **GP containers was recorded at 25%**, **reefers at 40%**, and **empties at 38%**. Additionally, the terminal operated with **nine STS cranes**, **22 RTGs**, and **57 hauliers** towards the end of the week. For the first time in a while, the terminal consistently had all nine STS cranes available.

On Friday, CTMPT recorded zero vessels at berth and none at outer anchorage. In the preceding 24 hours, the terminal did not handle any waterside volumes because no vessels were on berth. On the landside, 187 trucks were processed during the same period. Stack occupancy was recorded at 22% for general cargo, 23% for reefers, and 1% for empties. Towards the end of the week, the terminal operated with three cranes and four straddle carriers.

Between 12 and 18 May, the FPT terminal handled ten vessels: five multi-cargo, three dry bulk vessels, one breakbulk, and one cement vessel. Berth occupancy during this period was recorded at 82%. The terminal planned to handle nine more vessels between 19 and 25 May, with another four vessels scheduled between 26 May and 1 June. The late arrival of cargo and transporters accounted for the most significant operational constraints during this period.

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



Source: Marine Traffic. Updated 26/05/2025 at 14:00.

iii. Durban

On Friday, Pier 1 recorded zero vessels on berth, with zero vessels at anchor. Stack occupancy was **32%** for **GP containers** and **40%** for **reefers**. Between Monday and Thursday, the terminal executed at least 3 914 gate moves and 167 rail moves on the landside. The **average TTT** for the week was **~67 minutes** (**↓26%**, w/w) and an average **staging time** of **~31 minutes** (**↓55%**). Additionally, the terminal moved over 2 500 TEUs across the quay on the waterside during the same period. The terminal had **five STS cranes** and **18 RTGs** available towards the end of the week.

Pier 2 had four vessels on berth and one at anchorage on Friday, as adverse weather and equipment breakdowns prevented optimal operational performance this week. Stack occupancy was recorded at **55%** for **GP containers** and **51%** for **reefers**. The terminal operated with **11 gangs** and moved over 15 700 containers across the quay between Monday and Friday on the waterside. Approximately 13 786 gate moves were executed on the landside during the same period. For the last week, there was an **average TTT** of **~77 minutes** (**↑4%**, w/w) and a staging time of **~78 minutes** (**↑13%**). Approximately 1 461 units were moved by rail during the same period. The number of available straddle carriers fluctuated between **58** and **68** out of a fleet complement of **88** this week. Thus, the availability figure sat roughly at **72%** during this period.

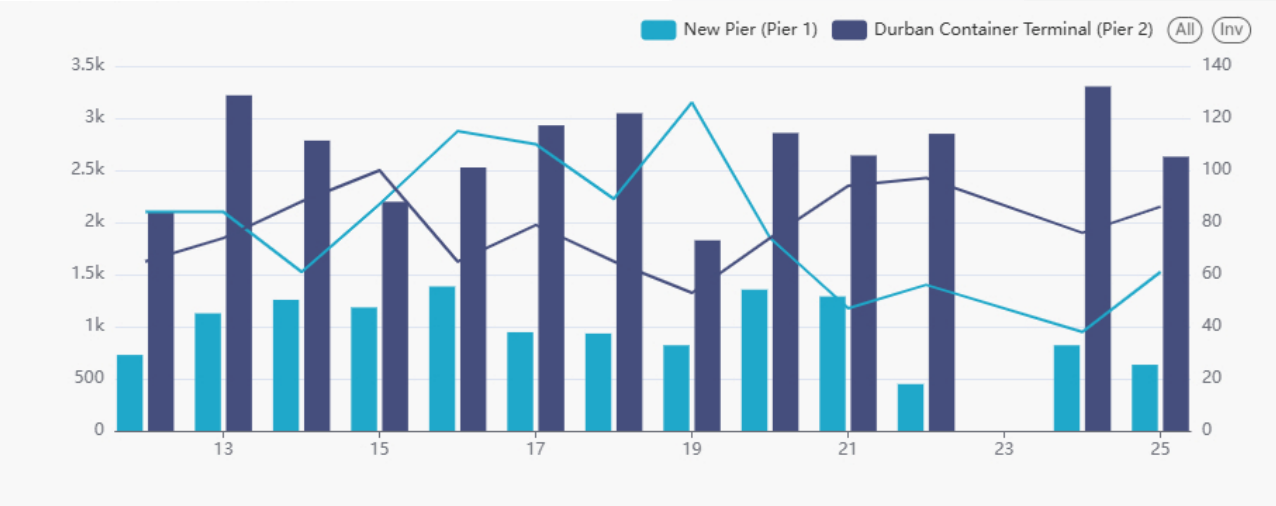
Durban's MPT terminal recorded zero vessels at berth on Friday and none at outer anchorage. Stack occupancy for containers was recorded at 12%, the reefer stack at 52%, and the breakbulk stack at 2%. In the preceding 24 hours, no volumes were handled on the waterside. On the landside, 21 container trucks and zero breakbulk RMTs were serviced. During this period, three cranes, seven reach stackers, seven forklifts, and 22 ERFs were in operation.

The Maydon Wharf MPT recorded zero vessels at berth or anchorage between Thursday and Friday. On the waterside, no volumes were handled, while 82 trucks, containing approximately 2 943 tons, were serviced on the landside. The agri-bulk facility recorded zero vessels at berth or anchor during the same period. The next vessel destined for the terminal is expected to arrive on 07 June.

On Friday, the Ro-Ro terminal in Durban recorded two vessels on the berth, with none at anchorage. In the preceding 24 hours, the terminal handled 2 314 road- and 150 rail units on the landside and 3 403 units on the waterside. Overall stack occupancy was 67%, 60% at Q&R, and 30% at G-berth. During this period, the terminal had 123 high-and-heavy (abnormal loads) on hand and managed to handle 11.

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.

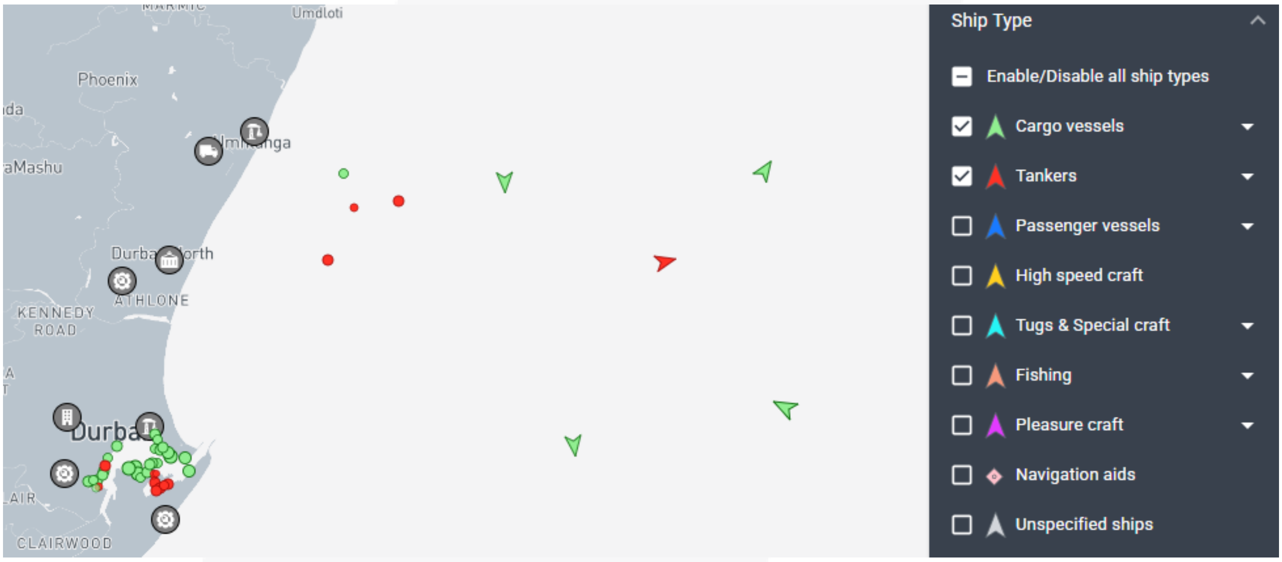
Figure 7 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2024, and updated 25/05/2025.

The queue of container vessels waiting outside Durban has stayed steady from last week. On Monday evening (26 May), **one** container vessel was waiting outside at anchorage for Pier 1, **one** for Pier 2, and **one** for Point 2. The queue of dry (**zero**), liquid (**three**), and breakbulk (**one**) vessels has decreased slightly from last week. The following snapshot shows the current status quo:

Figure 8 – Durban vessel view (per vessel group)



Source: Marine Traffic. Updated 26/05/2025 at 14:00.

iv. Richards Bay

On Monday (26 May), the Port of Richards Bay had 11 vessels at anchor and 15 on the berth, translating to five vessels at DBT, three at MPT, five at RBCT, and another two at the liquid bulk terminal. At the start of the week, two tugs, one pilot boat, and one helicopter operated for marine resources. Additionally, adverse weather conditions delayed several vessel movements last week. The daily average for the week remained elevated at around **175 338 tons** (**↓8%**, w/w). An average of **16 trains** (down by two from last week) were serviced on the landside, slightly below the target of 22.

v. Eastern Cape ports

On Friday, NCT recorded two vessels on berth and none at anchor, with zero vessels 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 27% for reefers, 26% for reefer ground slots, and 29% for the general stack. Despite having vacant berths for around seven to ten hours, the terminal handled approximately 2 634 TEUs and 128 reefers on the waterside. Approximately 658 trucks were processed on the landside at a TTT of ~31 minutes, while also handling two trains at an RTT of 1,2 hours. Towards the end of the week, the terminal had seven STS cranes, 25 RTGs, and 76 hauliers in service.

On Wednesday, GCT had zero vessels 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, 237 trucks were processed at a TTT of ~35 minutes on the landside, while 940 TEUs were handled across the quay on the waterside, despite being windbound for around three hours. Stack occupancy was recorded at 68% for the general stack, 98% for reefers, and 75% for reefer ground slots.

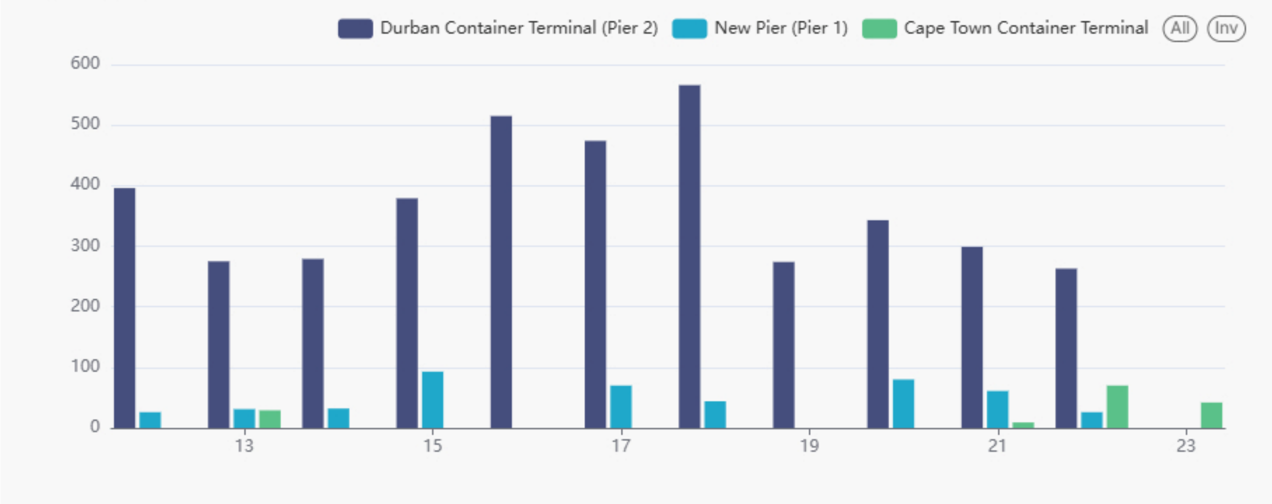
On Thursday, the Ro-Ro terminal had zero vessels on berth and none at outer anchorage. The terminal did not handle volumes during this period because no vessels were on berth. Stack occupancy was recorded at 13%, with the next vessel scheduled to arrive over the weekend.

The latest reports from Maersk suggest that the Mehuin and Santa Teresa are running late into South Africa for multiple reasons, including but not limited to congestion in Europe and bad weather en route. The Mehuin is anticipated to arrive at the Port of Elizabeth around 2 June, while the Santa Teresa is expected to arrive around 7 June.

vi. Transnet Freight Rail (TFR)

The latest reports from TFR suggest 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. Additionally, a power station issue near Ladysmith ensured delays of up to 18 hours on the ConCor line between Tuesday and Wednesday. Further, towards the end of the week, DCT Pier 2 had 398 ConCor units on hand with a dwell time of 48 hours and 349 over-border units with a dwell time of 96 days.

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



Source: Calculated using data from Transnet, 2024. Updated 25/05/2025.

In the last week (*19 to 25 May*), rail cargo on the ConCor line out of Durban was reported at **2 415** containers, down ↓**25%** from the previous week's **3 041** containers.

vii. MSC renews AMEX service

After months of uncertainty, confirmation from MSC headquarters in Geneva that the AMEX service will continue represents a vital and timely boost for South Africa's ocean freight connectivity.[6] With liner connectivity declining by **↓21,5%** in 2023/24 (according to UNCTAD's Liner Shipping Connectivity Index) – the second steepest drop globally after Russia – this renewed commitment helps to anchor direct maritime trade with the United States, one of South Africa's leading export destinations and a key source of high-value imports.

Amid rising trade complexity and escalating tariff pressures – especially under recent US policy shifts targeting SA exports (notably steel, aluminium, and automotive) – this development provides much-needed policy certainty in an otherwise volatile landscape. The impact of these tariffs is estimated at **1,3% of South Africa's GDP**. Amid this complex environment, recent high-level engagements between South African and US delegations – including last week's Oval Office consultations – underscore the imperative of safeguarding and enhancing trade channels with one of the world's largest economies.

The USA remains a critical trading partner, absorbing 8% of South Africa's exports and supplying 9% of its imports in 2024, with the trade balance strongly in South Africa's favour, according to a recent presentation by XA Global Trade Advisors.

While the recent omission of the Port of Cape Town from certain AMEX rotations remains a significant concern, particularly for Western Cape agri-exporters, MSC's renewed commitment is a clear signal of confidence. It underscores the importance of continued engagement between industry, government, and global carriers in maintaining South Africa's strategic position in global trade flows.

[6] Goddard, E. 27/05/2025. MSC confirms weekly continuation of SA-US direct sailings.

viii. Transnet-UNTU Wage Negotiations

The latest reports from TNPA suggest that the CCMA Commissioner issued a detailed report on Tuesday evening (20 May) for all stakeholders to analyse and digest. All stakeholders have until 10 June to accept or reject the submitted proposal. SATAWU has already accepted the previous salary offer from Transnet, which subsequently took effect from 1 April. However, UNTU are demanding a higher salary proposal and should the latest proposal not satisfy their demands, they will most likely proceed with industrial action.

2. Air Cargo Update

a. International air cargo

The following table shows the inbound and outbound air cargo flows to and from ORTIA for the week beginning 12 May. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in *May 2024* averaged **~838 541 kg** daily.

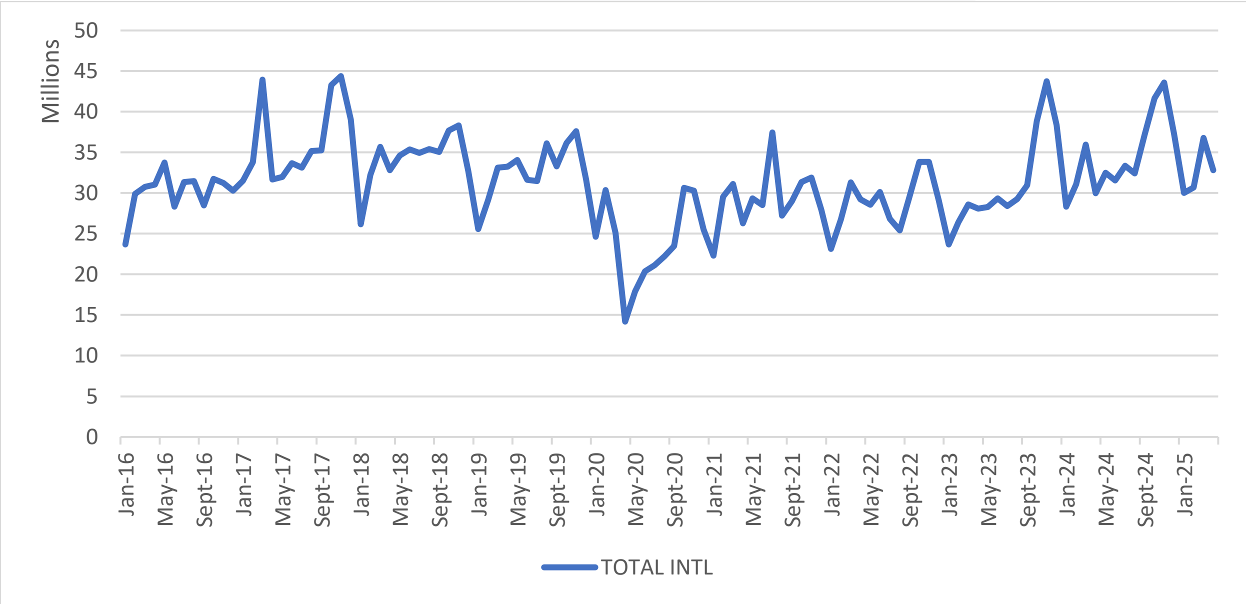
Table 4 – International inbound and outbound cargo from OR Tambo

Flows	12-May	13-May	14-May	15-May	16-May	17-May	18-May	Week
Volume inbound	474 205	218 096	336 742	367 362	318 227	305 209	2 001 421	**4 021 262**
Volume outbound	102 201	174 020	213 714	212 127	265 948	199 518	1 536 724	**2 704 252**
Total	**576 406**	**392 116**	**550 456**	**579 489**	**584 175**	**504 727**	**3 538 145**	**6 725 514**

Courtesy of ACOC. Updated: 25/05/2025.

In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **574 466 kg** inbound (**↑14%**, w/w) and **386 001 kg** outbound (**↑16%**). The healthy increase means the current volumes are significantly up on last year's levels (**↑15%**, y/y), and above the comparative levels of pre-pandemic 2019 (**↑2%**). The following figure shows the international air cargo flows to and from South Africa (all airports) since the start of 2016:

Figure 10 – International cargo for all airports – volumes per month (kg millions)



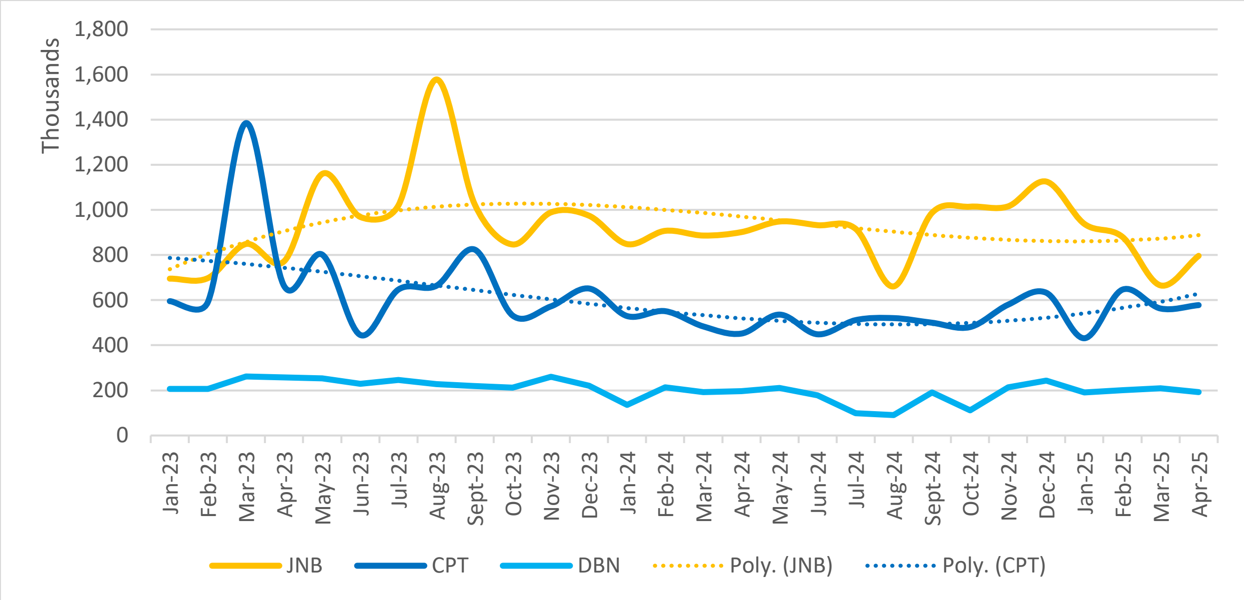
Calculated from ACOC. Updated: 25/05/2025.

Operationally, the industry has this week raised urgent concern over the sudden ban on e-hailing vehicles at ORTIA's Cargo Terminal, citing the lack of consultation and absence of current threat intelligence as deeply problematic. SAAFF and ACOC argue that the decision is disproportionate, undermines trade facilitation, and negatively impacts small businesses and direct B2C logistics. The industry bodies fervently call for the immediate reversal of the ban and propose a collaborative, evidence-based risk review process that preserves fair access while strengthening targeted security measures.

b. Domestic air cargo

The following figure shows the movement since the start of last year:

Figure 11 - Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 25/05/2025.

3. Road and Regional Update

a. Lebombo border post update

In the last week (*19 to 25 May*), cargo movements along the N4 corridor increased slightly for road and were stable for rail. The following notes summarise the recent developments:

- Truck volumes at **1 430 HGVs per day** (**↑1%**, w/w).
- There was a slightly increased average of **3,1 hours**' (**↑11%**) worth of queuing time at the border, as the average processing time also increased – to around the same time of **3,1 hours** (**↑24%**) per crossing.
- The rail to Maputo decreased to an average of **seven trains daily** (down by **two**).
- Sugar trains from Eswatini were stable at around **two trains a day**.

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

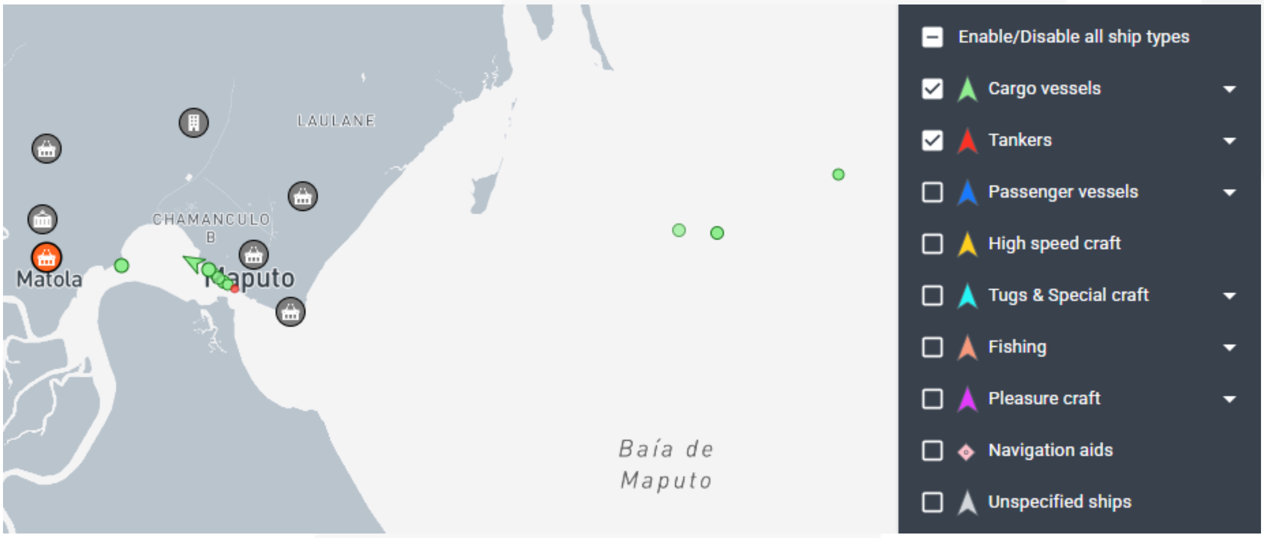
Table 5 – Lebombo border post update

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**
19-May-25	1 276	1 205	1 012	112	12	65	4	302	**10**	7	*	3
20-May-25	1 368	1 234	940	214	38	57	11	308	**10**	7	1	2
21-May-25	1 583	1 565	1 138	276	46	68	42	364	**8**	7	*	1
22-May-25	1 427	1 345	880	275	57	80	53	296	**9**	7	*	2
23-May-25	1 498	1 376	963	235	48	100	30	342	n/a	*	*	*
24-May-25	1 351	1 199	727	304	62	57	49	278	n/a	*	*	*
25-May-25	1 504	1 486	989	295	64	83	55	258	n/a	*	*	*
% of design capacity	**95%**	**90%**	**79%**	**122%**	**n/a**	**146%**	**70%**	**15%**	**26%**	**70%**	**17%**	**50%**
% change (d/d)	11%	24%	36%	-3%	3%	46%	12%	-7%	**n/a**	**n/a**	**n/a**	**n/a**

Source: BUSA Bulletin - Mozambique Critical Supply Chain, week ending 25/05/2025.
** = not reported*

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

Figure 12 – Maputo vessel view (per vessel group)



Source: Marine Traffic. Updated 26/05/2025 at 14:00.

b. SADC cross-border and road freight delays

The following challenges and delays are affecting roads in South Africa and the broader SADC region:

- Overall, the average queue times decreased by around **20 minutes** from last week, as transit times decreased by around **half an hour**.
- The median border crossing times at South African borders increased by **20 minutes**, averaging **~9,9 hrs** (**↑3%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**).

1. **Groblersbrug delays**:
   a. Severe delays reported, with tankers queuing for up to **2 days**. The root cause was reported to be at the **DG Truckstop**, though SARS/AEO officials are processing efficiently once inside the control zone.
   b. **Dangerous goods fast-tracking** is in place but inconsistently applied. **Congestion is primarily on the Botswana side**, though transporters appreciate officials' efforts to manage flow.
2. **Chinhoyi accident**:
   a. A **2-truck accident on the bridge** into Chinhoyi occurred on **22 May**, causing prolonged disruption as recovery vehicles were slow to arrive. Caution advised.
3. **Bromley obstruction**:
   a. A **broken-down fuel tanker** blocked the **left-hand lane into Harare** on **21 May**, contributing to congestion.
4. **Toll Fee expansion**:
   a. **Mokambo and Sakania** border posts now charge **$50 each way** for tolls.
   b. At **Kasumbalesa**, a **single round-trip payment system** has been introduced to reduce congestion.
5. **CBRTA system issues**:
   a. Users face technical problems with the **Cross Easy Permit System**, particularly with the **vehicle dropdown menu**, disrupting application processes.
   b. Transporters have requested **workshops** to assist in navigating the system.
6. **Regional trade update**:
   a. **Namibia has banned chicken imports from Brazil** due to food safety concerns.
   b. A **SACU-wide ban** is under consideration, with other member states monitoring the situation closely.

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

Table 6 – Delays[7] summary – South African borders (both directions)

Border Post	Direction	HGV[8] 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	489	22,2	6,1	22,1	14 670	3 423
Beitbridge	Zimbabwe-SA	445	11,2	1,5	11,2	13 350	3 115
Groblersbrug	SA-Botswana	245	23,4	1,2	23,2	7 350	1 715
Martin's Drift	Botswana-SA	237	2,2	0,3	2,1	7 110	1 659
Kopfontein	SA-Botswana	234	9,7	1,1	9,4	7 020	1 638
Tlokweng	Botswana-SA	23	0,6	0,2	0,4	690	161
Vioolsdrift	SA-Namibia	30	3,8	1,5	3,5	900	210
Noordoewer	Namibia-SA	20	1,9	0,4	1,6	600	140

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

Border Post	Direction	HGV[8] Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	Est. HGV Tonnage per day	Weekly HGV Arrivals
Nakop	SA-Namibia	30	4,1	1,1	4,1	900	210
Ariamsvlei	Namibia-SA	20	1,0	0,3	0,6	600	140
Skilpadshek	SA-Botswana	259	4,3	1,5	4,2	7 770	1 813
Pioneer Gate	Botswana-SA	66	0,0	0,0	0,0	1 980	462
Lebombo	SA-Mozambique	1 420	3,1	0,5	3,1	42 600	9 940
Ressano Garcia	Mozambique-SA	1 322	1,4	0,2	1,2	39 660	9 254
Sum/Average		**4 840**	**6,4**	**1,1**	**6,2**	**145 200**	**33 880**

Source: TLC, FESARTA, & Crickmay, week ending 18/05/2025.

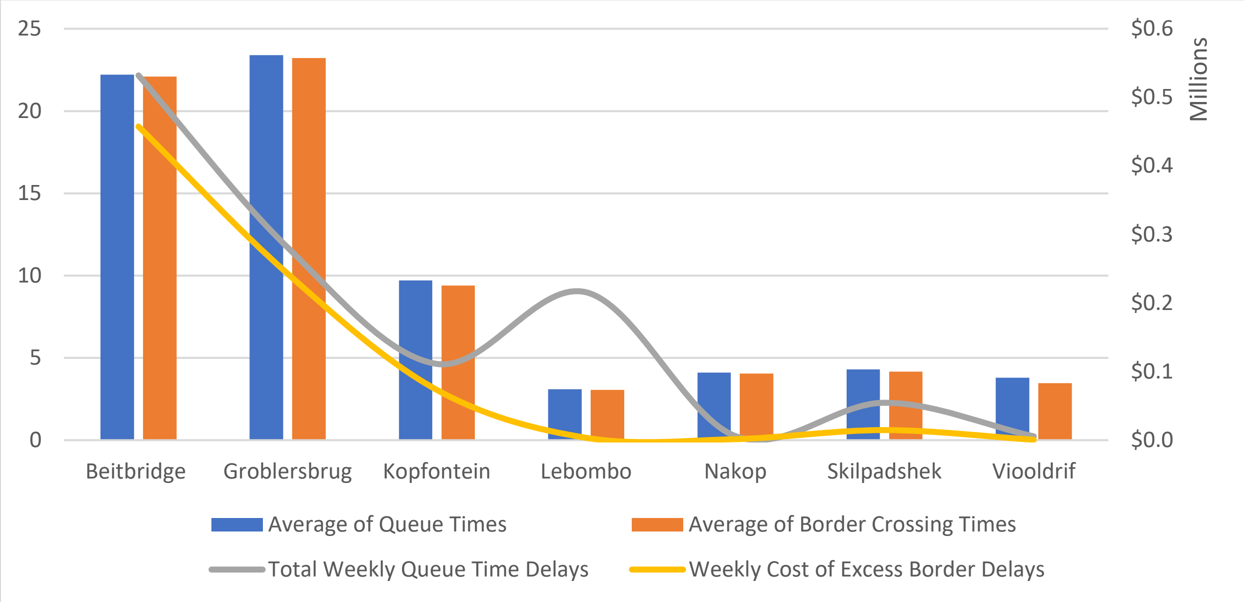
Table 7 – Delays summary – Corridor perspective

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	14,2	4,7	14,1	9 600	2 240
Central Corridor	798	2,2	0,1	2,1	23 940	5 586
Dar Es Salaam Corridor	1819	9,3	0,7	9,4	54 570	12 733
Maputo Corridor	2742	2,3	0,4	2,1	82 260	19 194
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South Corridor	3745	8,5	1,1	8,4	112 350	26 215
Northern Corridor	2817	1,3	0,3	1,3	92 520	21 588
Trans Caprivi Corridor	355	2,2	0,6	2,1	10 650	2 485
Trans Cunene Corridor	100	2,7	0,8	2,4	3 000	700
Trans Kalahari Corridor	116	17,2	7,3	17,2	3 480	812
Trans Oranje Corridor	100	0,0	0,0	0,0	3 000	700
Sum/Average	**13039**	**4,9**	**0,9**	**4,9**	**399 180**	**93 142**

Source: TLC, FESARTA, & Crickmay, week ending 18/05/2025.

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

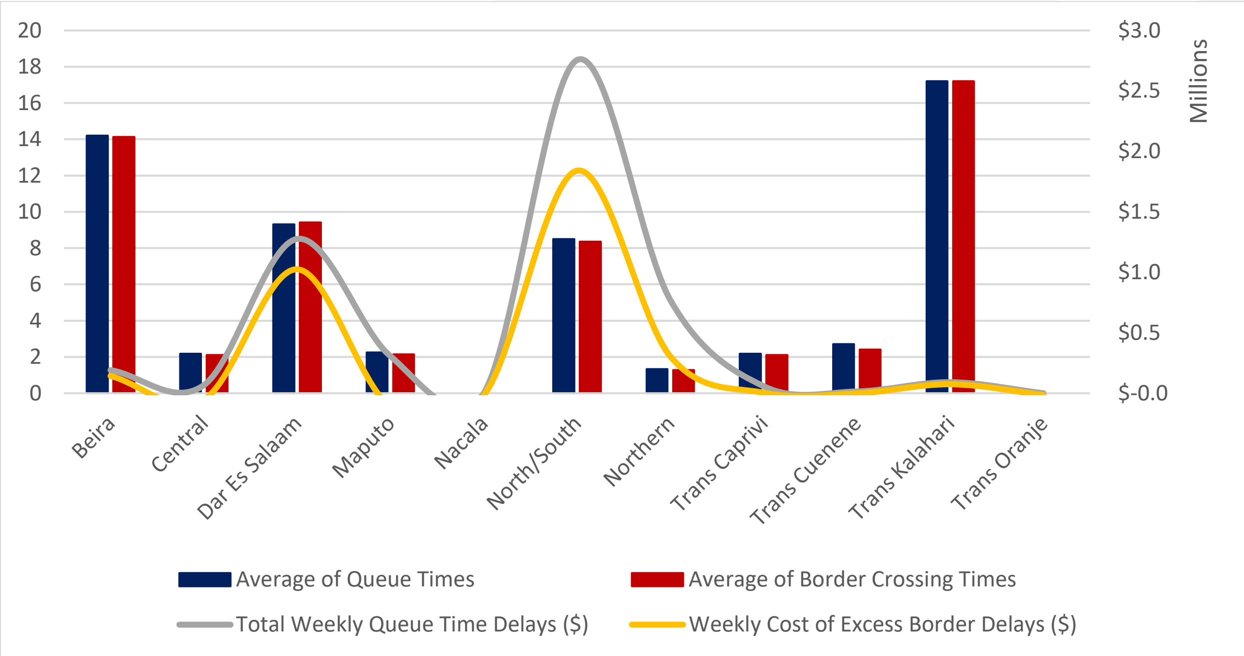
Figure 13 – Weekly cross-border delays & est. Cost from an SA border perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 18/05/2025.

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

Figure 14 – Weekly cross-border delays & est. Cost from a corridor perspective (hours & $ millions)



Source: TLC, FESARTA, & Crickmay, week ending 18/05/2025.

In summary, cross-border queue time averaged **~4,9 hours** (down by **~0,3 hours** from the previous week's **~5,3 hours**), indirectly costing the transport industry an estimated **$5,5 million** (**R100 million**). Furthermore, the week's average cross-border transit times also hovered around **4,9 hours** (down by **~0,6 hours** from the **~5,7 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,2 million** (**R57 million**). As a result, the total indirect cost for the week amounts to an estimated **~$8,7 million** (**R157 million**, up by **~R5 million** or **↑3,4%** from **~R152 million** in the previous report).

4. International Update

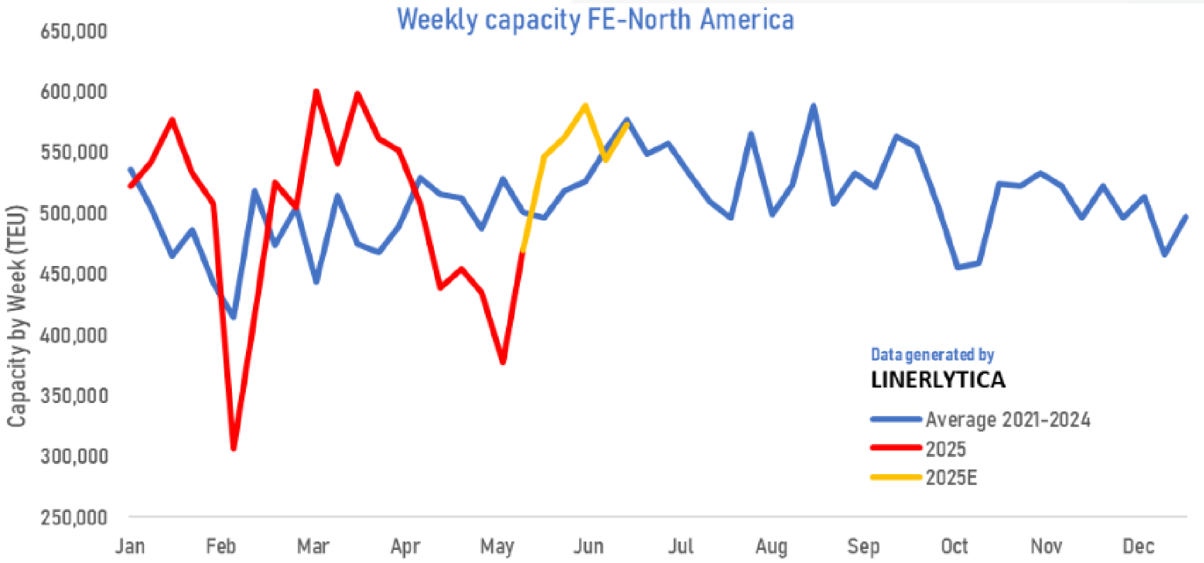
The following section provides some context around the global economy and its impact on trade, mainly an update on **(a)** the global shipping industry and **(b)** the global aviation industry.

a. Global shipping industry

i. Global container summary

The transpacific container shipping market is experiencing a significant capacity rebound. Weekly departures from Asia to the US are projected to average over **560 000 TEU** in the next four weeks, up from **377 000 TEU** in Week 19. This surge is driven by carriers reinstating suspended services, deploying additional loaders, and new entrants like China United Lines launching standalone services. Consequently, charter rates have escalated as carriers seek immediate vessel availability to meet the heightened demand (see below). Despite the US delaying proposed **50%** tariffs on EU imports, providing a temporary boost to Atlantic trade, the focus remains on Asian export routes.

Figure 15 – Weekly capacity: Far East to North America (TEUs)



Source: Linerlytica

Maersk and Hapag-Lloyd, operating under the new Gemini Cooperation, have launched a TP9/WC6 Transpacific service connecting East China and Northeast Asia to Long Beach, offering faster transit times of 14 to 18 days.[9] This move, alongside the reinstatement of previously blanked sailings, reflects strong carrier confidence in sustained demand growth and aims to boost capacity on key Asia–US trade lanes. Drewry's "*Cancelled Sailings Tracker*" have subsequently subsided at around a **6% cancellation rate** for pro-forma scheduling from 26 May to 29 June.[10] Lastly, port congestion is impacting about **2,5 million TEU** (**6,8% of the global fleet**), with a slight bottleneck around the Eastern Cape. Moreover, European ports are experiencing escalating congestion, with average delays now extending to five to six days due to labour shortages and low Rhine River levels, leaving stakeholders with limited options to mitigate the worsening situation.[11]

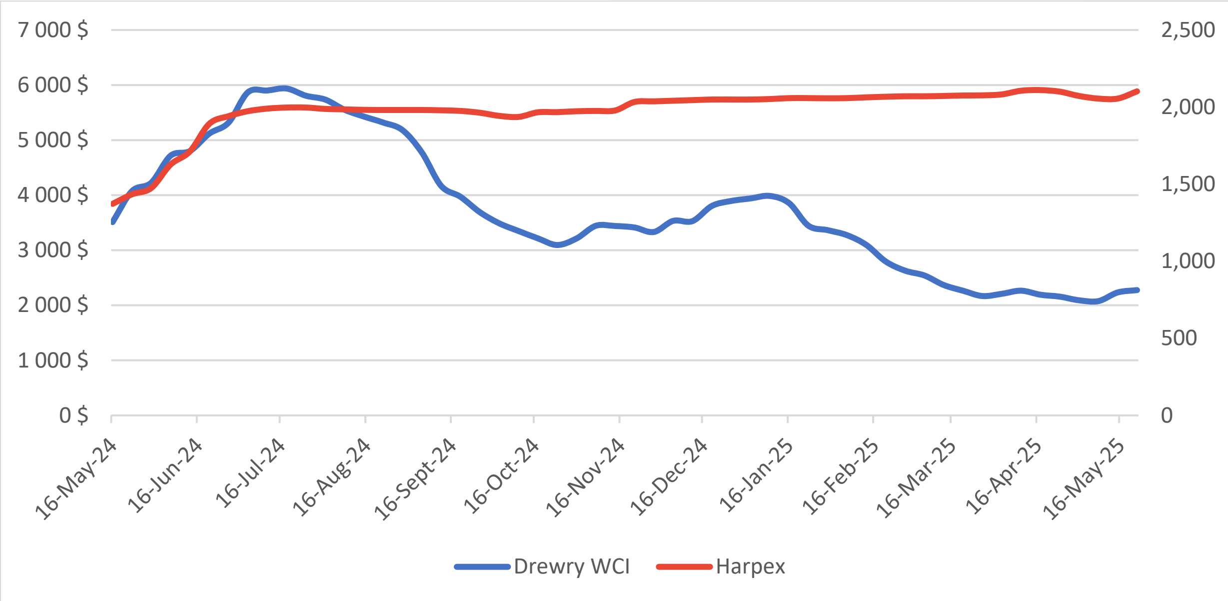
[9] Koo, A. & Goldstone, C. 27/05/2025 New services and reinstated blanked sailings boost transpacific capacity.
[10] Drewry. 23/05/2025. Cancelled Sailings Tracker.
[11] Goldstone, A. 21/05/2025. European port congestion now at five-to-six days, and getting worse.

ii. Global freight rates and carrier profits

The Asia-Europe rate rally is losing momentum, partly due to Maersk's aggressive pricing strategies undercutting competitors.[12] Transpacific freight rates are anticipated to rise to **$6 000/FEU** for the US West Coast and **$7 000/FEU** for the East Coast by 1 June. However, with container equipment availability and port congestion under control, the market is unlikely to replicate the pandemic-era rate peaks exceeding **$10,000/FEU**.

Globally, Drewry's "*World Container Index*" continued the recent uptick trends, as the index increased by **↑1,9%** (or **$43**) to **$2 276 per 40-ft container**[13]. Meanwhile, as mentioned above, charter rates jumped as the transpacific demand spiked, as the *Harper Petersen Index* (Harpex) traded around **2 102 points** (**↑2,3%**) on Friday.[14]

Figure 16 – World Container Index ($ per 40ft), and Harper-Petersen Index



Source: Calculated from Drewry and Harpex

iii. Further developments of note

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

1. **WiseTech's $2,1bn acquisition of E2open signals global supply chain ambitions:**
    a. WiseTech expands its global footprint by integrating E2open's vast enterprise network into CargoWise, boosting WiseTech's reach and service offering in global logistics.[15]
    b. The move sets to combine logistics software and supply chain management to enhance automation, efficiency, and innovation.
2. **Crew saved as MSC box ship sinks off Indian coast:**
    a. The Liberia-flagged MSC Elsa 3 sank approximately 38 nautical miles southwest of Kochi on 25 May 2025 after developing a severe list during monsoon conditions. All 24 crew members were safely rescued by the Indian Coast Guard and Navy.[16]

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[12] Linerlytica. 26/05/2025. Market Pulse – Week 21.
[13] Drewry. 22/05/2025. World Container Index.
[14] Harpex. 23/05/2025. Harper Petersen & Co Charter Rate Index.
[15] Van Marle, G. 27/05/2025. $2.1bn E2open purchase will 'catapult WiseTech into a different dimension'.
[16] Mathias, A. 27/05/2025. Crew saved as MSC box ship, hit by 'monsoon' off Indian coast, sinks.

b. The vessel carried 640 containers, including 13 with hazardous materials and 12 containing calcium carbide, along with significant quantities of diesel and furnace oil. Authorities have initiated pollution response measures as containers washed ashore, raising environmental and public safety concerns.

b. Global air cargo industry

In the high-frequency metrics, World ACD data shows that global air cargo tonnages rose sharply by **↑6%** (w/w), driven by a strong **↑11%** rebound from Asia Pacific, particularly from China, Hong Kong (**↑8%**), Japan (**↑60%**), and South Korea (**↑21%**), after holidays and eased US-China tariff tensions. US-bound volumes from China and Hong Kong surged **↑19%**, while flows to Europe also strengthened. Middle East and South Asia (**↑11%**) and Europe (**↑6%**) also posted notable gains, though Central and South America (**↓4%**) declined post-Mother's Day.

Figure 17 – Regional changes in capacity, chargeable weight, and rates (weeks 2 to 5, % change)

Origin Regions last 2 to 5 weeks (WORLD ACD)	Capacity[1]			Chargeable weight[1]			Rate[1]		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-2%	+0%		+5%	+3%		-2%	+5%
Asia Pacific		+0%	+3%		+3%	+5%		-5%	-5%
C. & S. America		-11%	-7%		-23%	+3%		-5%	-5%
Europe		+2%	+4%		+14%	+6%		-3%	-1%
M. East & S. Asia		-1%	+3%		+1%	-2%		-3%	-15%
North America		-3%	-2%		+4%	-0%		-1%	-1%
Worldwide		-1%	+1%		+3%	+4%		-3%	-4%

Source: World ACD

Global spot rates edged up to **$2,50/kg** (**↑2%**, w/w), but remain **↓3%** (y/y). Asia Pacific pricing rose, while MESA saw the sharpest year-on-year drop in rates. Overall, demand recovery was broad-based despite regional fluctuations.

ENDS[17]

[17]**ACKNOWLEDGEMENT:**

*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.*