



Date: 25 May 2025

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.
- i. Port operations - General**
- At our container terminals, an average of **10 262 TEUs** was handled daily, decreasing from **12 124 TEUs** the previous week.
 - For the coming week, an increased average of **~12 275 TEUs (↑20%)** is predicted to be handled.
 - 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.
- ii. Port operations – Performance metrics**
- CTCT stack occupancy for **GP containers was recorded at 25%, reefers at 40%, and empties at 38%**.
 - The terminal operated with **nine STS cranes, 22 RTGs, and 57 hauliers** towards the end of the week.
 - CTCT handled an average of **~1 341 TEUs (↓37%, w/w)** containers a day, with an average of **~1 698 (↑27%)** projected this week.
 - DCT Pier 1: Stack occupancy was **32% for GP containers and 40% for reefers**.
 - The terminal operated with **five STS cranes and 18 RTGs** towards the end of the week.
 - DCT Pier 1 handled **~1 229 TEUs (↓38%, w/w)** containers a day, with an average of **~1 996 (↑62%)** projected this week.
 - The **average TTT** for the week was **~67 minutes (↓26%, w/w)** and an average **staging time of ~31 minutes (↓55%)**.
 - DCT Pier 2: Stack occupancy was at **55% for GP containers and 51% 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 **11 gangs**.
 - For the last week, there was an **average TTT of ~77 minutes** (↑4%, w/w) and a staging time of **~78 minutes** (↑13%).
 - 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.
 - 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.
- 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 **~1 535 TEUs** (↓34%, w/w) containers a day, with an average of **~2 064 TEUs** (↑34%) projected this week.
 - Port Elizabeth Container Terminal handled an average of **~469 TEUs** (↓7%, w/w) containers a day, with an average of **~454 TEUs** (↓10%) projected this week.
 - Other terminals handled a combined average of **~679 TEUs** (↓11%, w/w), with an average of **~864 TEUs** (↑27%) projected this week.
- At RBCT, 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.
- 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.
- MSC's decision to continue the AMEX service stabilises South Africa–US ocean trade links, countering a 21,5% drop in liner connectivity, the second worst globally, and supports access to a key high-value trade partner.
 - With US tariffs affecting up to 1,3% of SA's GDP and high-level bilateral talks underway, MSC's move offers crucial trade reassurance, despite ongoing concerns like Cape Town's omission from some rotations.
- 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.

iii. Lebombo 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**.

iv. Local and cross-border road:

- 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.
- 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).



v. Global shipping industry

- 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.
- 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.
 - 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.
- 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.
- The Asia-Europe rate rally is losing momentum, partly due to Maersk's aggressive pricing strategies undercutting competitors.
 - 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**.
- 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.
- 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**.

vi. South African air industry

- 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.

vii. International air 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.
- 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 YoY drop in rates.
 - Overall, demand recovery was broad-based despite regional fluctuations.