SAVINO DEL BENE®
Global Logistics and Forwarding Company

CARGO MOVEMENT UPDATE

Date: 13 July 2025

Key Notes

- An average of **~12 933 TEUs** was handled per day, with **~12 609 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 771** containers, up by ↑9% from last week.
- Cross-border queue: **↓0,5 hrs**; transit: **↓0,5 hrs**; SA borders: **10,5 hrs** (**↓6%**); SADC: **4,7 hrs** (**no change**).
- World merchandise trade volume grew strongly in Q1 2025 **~↑4%** (y/y), exceeding WTO forecasts.

i. Port operations - General

- At our container terminals, an average of **12 424 TEUs** was handled daily, down from **13 933 TEUs** the previous week.
    - For the coming week, a slightly decreased average of **~12 609 TEUs** (**↑1%**) is predicted to be handled.
- Port operations were mainly constrained by adverse weather, vacant berths, as well as equipment breakdowns and shortages.
    - Adverse weather and equipment breakdowns led to operational delays at the Port of Cape Town, while the main operational constraints in Durban were continuous equipment breakdowns and adverse weather conditions.
    - Vacant berths and inclement weather mainly impacted operations at our Eastern Cape Ports, while minimal delays were reported at the Port of Richards Bay.
- The latest reports from TFR indicate that intermittent cable theft continued on the Central Corridor this week; however, the situation appears to be improving.
    - Additionally, TFR communicated that the annual shutdown on the line between Pretoria and Durban will commence next week, resulting in no trains moving on the line for two weeks.

ii. Port operations – Performance metrics

- CTCT stack occupancy for **GP containers was recorded at 34%**, **reefers at 10%**, and **empties at 55%**.
    - Additionally, the terminal operated with **six STS cranes**, **20 RTGs**, and **56 hauliers** towards the end of the week.
- CTCT handled an average of **~1 874 TEUs** (**↓3%**, w/w) containers a day, with an average of **~1 755** (**↓6%**) projected this week.
- DCT Pier 1: Stack occupancy was **42%** for **GP containers** and **43%** for **reefers**.
    - The terminal operated with **six STS cranes** and **18 RTGs** towards the end of the week.
- DCT Pier 1 handled **~2 229 TEUs** (**↓11%**, w/w) containers a day, with an average of **~2 073** (**↓7%**) projected this week.
    - The **average TTT** for the week was **~61 minutes** (**↑2%**, w/w) and an average **staging time** of **~34 minutes** (**↑13%**).
- DCT Pier 2: Stack occupancy was at **54%** for **GP containers** and **30%** for **reefers**.
- DCT Pier 2 handled **~5 151 TEUs** (**↓4%**, w/w) containers a day, with an average of **~5 408** (**↑5%**) projected this week.
    - The terminal operated **12 gangs**.
    - Over the last week, the average TTT was **~81 minutes** (**↓7%**, w/w), and the staging time was also **~81 minutes** (**↑29%**).
    - The number of available straddle carriers fluctuated between **71** and **76** out of a fleet complement of **88** this week.

        - Thus, the availability figure sat roughly at **84%** during this period.
        - Towards the end of the week, the most notable crane absentees were Cranes 521, 522, and 531; however, these machines were anticipated to return to operations before the weekend.
    - The queue of container vessels waiting outside Durban has decreased slightly from last week.
        - On Monday evening (13 July), **one** container vessel was waiting outside at anchorage for Pier 1, **none** for Pier 2, and **one** for Point.
        - The queue of dry (**three**), liquid (**two**), and breakbulk (**two**) vessels has also remained stable.
        - However, there are some international reports of increased congestion at African ports and carriers introducing surcharges.
- 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 **~2 077 TEUs** (**↓6%**, w/w) containers a day, with an average of **~2 059 TEUs** (**↓1%**) projected this week.
    - Port Elizabeth Container Terminal handled an average of **~262 TEUs** (**↓59%**, w/w) containers a day, with an average of **~499 TEUs** (**↑90%**) projected this week.
    - Other terminals handled a combined average of **~831 TEUs** (**↓36%**, w/w), with an average of **~815 TEUs** (**↓2%**) projected this week.
- The daily average coal throughput for the week decreased again to around **107 000 tons** (**↓16%**, w/w).
    - Nevertheless, despite the reduction, an increased average of **23 trains** (up by **five** from last week) were serviced on the landside, slightly above the target of 22.
- In the last week (*7 to 13 July*), rail cargo on the ConCor line out of Durban was reported at **3 771** containers, up by **↑9%** from the previous week's **3 448** containers.

iii. TNPA: June update

TNPA has released consolidated port statistics for June, with another month of significant increases in monthly performance across the respective sub-sectors:

- Containers increased monthly by **↑8%** (m/m), but decreased annually by **↓5%** (y/y).
- Total bulk cargo increased monthly by **↑6%** (m/m) and annually by **↑1%** (y/y).
- Vehicles increased monthly by **↑15%** (m/m) and annually by **↑8%** (y/y).
- Transnet Port Terminals handled **373 thousand containers** and **18,6 million metric tonnes** of **bulk** cargo during June, significantly more than the **347 thousand containers** and **17,6 million metric tonnes** of **bulk** cargo handled last month.
    - However, compared to cyclical trends, the number of containers is down by **19 thousand**.
- Only liquid bulk throughput is down annually (**↓14%**, y/y); whereas dry bulk (**↑1%**) and breakbulk (**↑26%**) throughput have increased compared to June 2024.
    - When reading the cyclical figures with the year-to-date figures (note **Error! Reference source not found.**The optimism continues, as South Africa's bulk cargoes are up by **↑6% YTD**.
    - As with last month, containers are down versus last year (**↓4,2%**) and **↓4,7%** below 2019 levels.

iv. Lebombo update

In the last week (*7 to 13 July*), cargo movements along the N4 corridor increased slightly for both road and rail transport (noticeable so for rail, after the recent shutdown). The following notes summarise the recent developments:

- Truck volumes through the border post were **1 622 HGVs per day** (**↑4%**, w/w).
- Queue times increased to an average of **4,9 hours** (**↑11%**) at the border due to some backlogs (*see below*), as the average processing time also increased to around **4,6 hours** (**↑7%**) per crossing.
- The rail to Maputo increased to an average of **eight trains daily**. Sugar trains from Eswatini increased to around **two trains a day**.
- **Some developments in and around the Lebombo border post included the following:**
  - Some queues and backlogs were reported last week. Consequently, a nearby runway has been opened as a staging area in a “Dry Run” (trial operation) without BMA involvement.
  - Ablution facilities and security services have been requisitioned. One contributing factor to congestion is drivers leaving trucks unattended and blocking the exit lane.
- **N4 Construction (near Crocodile):**
  - Periodic Stop/Go controls were implemented during the past week.
  - Planned construction works ended last Thursday.

v. Local and cross-border road:

- Overall, the average queue time decreased by approximately **half an hour** from last week, while transit time also decreased by around **half an hour**.
- The median border crossing times at South African borders decreased by **three-quarters of an hour**, averaging **~10,5 hrs** (**↓6%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**).

1. **Kopfontein Border Post:**
   a. Power outage reported on Friday; Immigration closed the border at 17:00 on Saturday.
   b. Power was restored at 21:19 the same night.
2. **Musina Area Incident:**
   a. A collision involving a bus and a truck occurred just before the weighbridge outside Musina.
   b. The road was fully blocked but cleared to two lanes to restore traffic flow.
3. **Ndola Bypass (Zambia):**
   a. The newly completed Abraham Mokola tollgate is operational.
   b. While it adds costs for transporters, it will reduce delays caused by trucks getting stuck in Ndola town.
4. **Botswana Unified Revenue Service (BURS) Customs System:**
   a. System issues reported since early last week.
   b. Transporters can log in, but tariff codes are not accepted.
   c. Processing remains operational but very slow.

- In summary, cross-border queue time averaged **~5,6 hours** (down by **~0,5 hours** from the previous week's **~6,1 hours**), indirectly costing the transport industry an estimated **$5,9 million** (**R104 million**). Furthermore, the week's average cross-border transit times also hovered around **~5,6 hours** (down by **~0,5 hours** from the **~6,1 hours** recorded in the previous report), at an indirect cost to the transport industry of **$3,5 million** (**R61 million**). As a result, the total indirect cost for the week amounts to an estimated **~$9,4 million** (**R165 million**, down by **~R6 million** or **↓3,2%** from **~R171 million** in the previous report).

vi. World merchandise trade

- World merchandise trade volume grew strongly in Q1 2025, exceeding WTO forecasts as importers front-loaded orders before US tariff hikes.
- North American imports surged **↑13,4%** (q/q) followed by Africa at **↑5,1%**; The Commonwealth of Independent States (CIS) fell **↓0,5%**.
- Export growth was fastest in the Middle East (**↑6,3%**) and Asia (**↑5,6%**).
- In dollar terms, world exports rose **~↑4%** (y/y), led by office equipment and chemicals, while automotive and fuels declined. .
- Despite this rebound, WTO forecasts nearly flat trade growth (**↑0,1%**) for all of 2025 amid persistent geopolitical and economic uncertainties.

vii. Global shipping industry

- Global spot rates continue to decline, as Drewry's "*World Container Index*" is down by **↓5%** (or **$140**) to **$2 672 per 40-ft container** this week.
  - The index is now down by **↓55%** (y/y), as this week marks the fourth consecutive drop in rates after the massive surge during the US tariff confusion and accompanying frontloading around May/early June.
- Meanwhile, the *Harper Petersen Index* (Harpex) traded around **2 164 points** on Friday, as charter rates remained robust.
- Elsewhere, security in the Red Sea has worsened, highlighted by the sinking of two bulk carriers, even as Suez Canal traffic patterns adjust with increased transits by mid-sized (**4 000** to **7 500 TEU**) Container Ships and falling sub-Panamax crossings.
  - Meanwhile, the largest Megamax vessels (**18 000+ TEU**) continue to avoid the region entirely for the fifteenth consecutive month.

viii. South African air industry

- In the air cargo industry, the daily average of air cargo handled at ORTIA in the previous week amounted to **~544 000 kg** inbound (**↑10%**, w/w) and **~312 000 kg** outbound (**↓2%**).
  - The current levels indicate that cargo is trending at approximately the same level as last year (**↓1%**, y/y) and the comparative levels of pre-pandemic 2019 (**↑1%**).

For the full month of June:

- Johannesburg decreased by **↓3%** (m/m) versus May but increased by **↑6%** (y/y) versus 2024.
- Cape Town decreased by **↓15%** (m/m), but increased by **↑1%** (y/y) versus 2024.
- Durban increased by **↑13%** (m/m) and increased by **↑30%** (y/y) compared to 2024.
- Despite the monthly decrease in air cargo, the year-to-date cargo is still up by **↑5%** (y/y) versus 2024.

For the full month of June, domestic volumes handled at our three main terminals dropped drastically:

- Johannesburg decreased by **↓36%** (m/m) versus May and by **↓27%** (y/y) versus 2024.
- Cape Town decreased by **↓80%** (m/m) and by **↓74%** (y/y) versus 2024.
- Durban decreased by **↓8%** (m/m) and by **↓2%** (y/y) versus 2024.
- Operationally, several domestic aviation developments are worth noting this week, including **(1)** ACSA's suspension of its security executive pending an investigation and appointment of an acting

replacement, **(2)** the imposition of an estimated R1,5 million SACAA fine for security protocol breaches, and **(3)** clarification that Temu has not established local warehousing, maintaining reliance on overseas dispatch for South African air cargo.

ix. International air industry

- Internationally, in the first week of July, global air cargo volumes declined by **↓3%** (w/w), mainly due to reduced activity from North America over the US Independence Day, while average rates rose **↑2%**.
- Capacity remained broadly stable, with Africa showing the strongest growth in both tonnage and rates, and global trends reflecting ongoing modal shifts and regional rebalancing.
- Despite this, global average rates increased by **↑2%** (w/w) to **$2,48/kg**, driven by robust spot market conditions.