SAVINO DEL BENE®
Global Logistics and Forwarding Company

CARGO MOVEMENT UPDATE

Date: 29 June 2025

Key Notes

- An average of **~12 531 TEUs** was handled per day, with **~12 609 TEUs** projected for next week.
- Rail cargo handled out of Durban was reported at **3 422** containers, up by ↑**4%** from last week.
- Cross-border queue: ↑**0,1**; transit: ↑**0,8 hrs**; SA borders: **9,6 hrs** (↓**11%**); SADC: **4,7 hrs** (**no change**).
- Drewry's "*Global Container Port Throughput Index*" increased ↑**0,5%** (m/m) and ↑**5,6%** (y/y) in April.

i. Port operations - General

- At our container terminals, another high average of **12 531 TEUs** was handled daily, decreasing slightly from the record **13 893 TEUs** the previous week.
  - For the coming week, a slightly increased average of **~12 609 TEUs** (↑**1%**) is predicted to be handled.
- Despite another high volume week, port operations were still interrupted by adverse weather, vacant berths, as well as continuous equipment breakdowns and shortages.
  - The Port of Cape Town experienced more than 30 operational hours of downtime due to adverse weather this week, while the main operational constraints in Durban were equipment challenges and adverse weather.
  - Rehabilitation continues on Bayhead Road.
  - Empty berths, equipment challenges, and a power failure prevented optimal performance 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 is ongoing on the central corridor; however, trains continue to operate despite the incidents that have occurred.
  - Additionally, delays of up to 12 hours were experienced over the weekend (21 & 22 June) on the line between Johannesburg and Mafikeng due to "diesel breakdowns."

ii. Port operations – Performance metrics

- CTCT stack occupancy for **GP containers was recorded at 17%, reefers at 31%, and empties at 38%**.
  - Additionally, the terminal operated with **eight STS cranes**, **22 RTGs**, and **55 hauliers** towards the end of the week.
  - Crane LC3 was out of commission during this time for planned maintenance operations.
- CTCT handled an average of **~1 681 TEUs** (↓**21%**, w/w) containers a day, with an average of **~1 755** (↑**4%**) projected this week.
- DCT Pier 1: Stack occupancy was **57%** for **GP containers** and **22%** for **reefers**.
  - The terminal operated with **four STS cranes** and **16 RTGs** towards the end of the week.
- DCT Pier 1 handled **~2 331 TEUs** (↑**26%**, w/w) containers a day, with an average of **~2 073** (↓**11%**) projected this week.
  - The **average TTT** for the week was **~50 minutes** (↓**29%**, w/w) and a low average **staging time** of **~22 minutes** (↓**42%**).
- DCT Pier 2: Stack occupancy was at **61%** for **GP containers** and **66%** for **reefers**.
- DCT Pier 2 handled **~4 990 TEUs** (↓**18%**, w/w) containers a day, with an average of **~5 408** (↑**8%**) projected this week.
  - The terminal operated **11 gangs**.
  - The **average TTT** for the week was **~78 minutes** (↓**18%**, w/w) and an average **staging time** of **~100 minutes** (↑**45%**).

- The number of available straddle carriers fluctuated between **70** and **75** out of a fleet complement of **88** this week.
  - Thus, the availability figure sat roughly at **83%** during this period.
  - Towards the end of the week, the most notable crane absentees were Cranes 520, 522, 525 and 526.
- The queue of container vessels waiting outside Durban has decreased slightly from last week.
  - On Monday evening (30 June), **no** container vessels were waiting outside at anchorage for Pier 1, **one** for Pier 2, and **one** for Point.
  - The queue of dry (**seven**), liquid (**four**), and breakbulk (**two**) vessels has remained steady 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 **~2 080 TEUs** (**↓10%**, w/w) containers a day, with an average of **~2 059 TEUs** (**↓1%**) projected this week.
  - Port Elizabeth Container Terminal handled an average of **~540 TEUs** (**↓6%**, w/w) containers a day, with an average of **~499 TEUs** (**↓8%**) projected this week.
  - Other terminals handled a combined average of **~910 TEUs** (**↓6%**, w/w), with an average of **~815 TEUs** (**↓10%**) projected this week.
- The daily average coal throughput for the week at RBCT decreased again to around **119 000 tons** (**↓31%**, w/w), as some high days were offset with some low days.
  - A low average of **13 trains** (down by **eight** from last week) were serviced on the landside, significantly below the target of 22.
- In the last week (*23 to 29 June*), rail cargo on the ConCor line out of Durban was reported at **3 422** containers, up by ↑4% from the previous week's **3 294** containers.
- Lastly, TNPA has issued a request for proposals (RFP) for the appointment of a terminal operator to fund, design, develop, construct, operate, maintain and transfer a liquid bulk terminal at the Port of Ngqura, for a concession period of 25 years.

iii. SARS merchandise trade statistics: May

- SARS released its latest "*Merchandise Trade Statistics*" for May, revealing a preliminary monthly trade surplus of **R21,7 billion**.
  - Monthly trade data indicates that exports increased by **↑6,3%** from April (m/m) to **R175,7 billion**, while imports increased by **↑1,2%** (m/m) to **R154,1 billion**.
  - The year-to-date trade surplus of **R60,3 billion** is slightly lower than the **R63,9 billion** surplus in May 2024.

iv. Lebombo update

In the last week (*23 to 29 June*), cargo movements along the N4 corridor increased slightly for road transport, as the rail shutdown has led to a modal shift onto road. The following notes summarise the recent developments:

- Truck volumes through the border post at **1 653 HGVs per day** (**↑2%**, w/w).
- Queue times increased to an average of **4,0 hours** (**↑48%**) at the border, as the average processing time also increased to around **3,6 hours** (**↑50%**) per crossing.
- Rail cargo is set to pick up again, as operations were reintroduced by the end of the week.

v. Local and cross-border road:

- Overall, the average queue time increased by **10 minutes** from last week, while transit time decreased by around **three-quarters of an hour**.
- The median border crossing times at South African borders decreased by **an hour and a quarter**, averaging **~9,6 hrs** (**↓11%**) for the week.
- In contrast, the greater SADC region (excluding South African-controlled) was stable, averaging **~4,7 hrs** (**no change**).

1. **Border operations – Zimbabwe Revenue Authority (ZIMRA)**
    a. Anti-smuggling initiative involving **100% cargo scanning** at key borders (Beitbridge and Chirundu) has resulted in long queues and substantial increases in crossing times.
    b. The cost of crossing at Beitbridge reportedly is **more than double** that of Kazungula.
2. **Zimbabwe – Road Incidents**
    a. **Harare area (Northwest):**
        i. Truck accident ~20 km northwest of Harare at 10:39 AM.
        ii. Both lanes initially blocked; a single lane was later opened for both directions.
        iii. Authorities advised extreme caution in the area.
    b. **Between Chegutu and Kadoma (west of Harare):**
        i. Truck overturned, blocking both lanes.
        ii. Traffic diverted via Vergas.
        iii. Delays expected; caution urged.
3. **Cobalt export ban – Zimbabwe**
    a. The temporary suspension on all cobalt derived from mining (effective from 22 February 2025) has been extended by three months due to the rationale of excess market stock.
    b. Authorities will review the policy before the extension period ends.

- In summary, cross-border queue time averaged **~4,8 hours** (up by **~0,1 hours** from the previous week's **~4,7 hours**), indirectly costing the transport industry an estimated **$5,3 million** (**R97 million**). Furthermore, the week's average cross-border transit times also hovered around **4,8 hours** (down by **~0,8 hours** from the **~5,6 hours** recorded in the previous report), at an indirect cost to the transport industry of **$2,9 million** (**R53 million**). As a result, the total indirect cost for the week amounts to an estimated **~$8,3 million** (**R150 million**, down by **~R2 million** or **↓1,7%** from **~R152 million** in the previous report).

vi. Global shipping industry

- Global carriers continue to deploy larger ships on traditionally smaller trades, with average vessel sizes on the Far East–West Africa route jumping **↑28%** year-on-year as MSC shifts **24 000 TEU vessels** from the Far East–North Europe corridor.
    - This strategic redeployment is mirrored on the Europe–Middle East–Indian Subcontinent trade, where over **12 500 TEU units** in service have doubled in a year.
    - Reflecting these changing scheduling dynamics, Ngqura will this week host its first ultra-large container vessel (ULCV), the *MSC Nicola Mastro*.
- Given the current geopolitical landscape, it is worth noting that CMA CGM has resumed and expanded its Suez/Red Sea transit, leading the month of June with 12 container-ship passages and capitalising on a temporary 15% Suez toll discount, while most other top carriers remain cautious amid regional tensions.
- Drewry's "*Global Container Port Throughput Index*" increased **↑0,5%** (m/m) and **↑5,6%** (y/y) in April.

  - Meanwhile, the rolling 12-month growth rate for global port handling remained steady at **↑6,5%**.
  - On a YTD (Jan-Apr) basis, port volumes have risen most strongly in North America (**↑9,7%**) and the Middle East and South Asia (**↑9,6%**), with Greater China (**↑7,5%**) not too far behind.
  - Throughput handled in Africa is down by a significant **↓12,1%** (m/m), but up by **↑4,1%** year-on-year.
- Drewry's "*World Container Index*" declined by **↓9%** (or **$296**) to **$2 983 per 40-ft container**, marking the second consecutive weekly drop following five weeks of gains.
  - While the Transpacific route saw the sharpest decline with a **↓16%** fall, Asia–Europe rates edged up slightly (**↑1%**), and Transatlantic rates remained relatively flat.
- Meanwhile, the *Harper Petersen Index* (Harpex) traded around **2 161 points** on Friday.
- Other developments include **(1)** the transpacific market faces signs of an early peak season slowdown as US inventories soften, **(2)** European port congestion remains a challenge, and **(3)** the *Morning Midas* car carrier sank 21 days after fire damage.

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 **~540 000 kg** inbound (**↓10%**, w/w) and **~300 000 kg** outbound (**↓7%**).
- Despite another weekly reduction, cargo is trending at the same level as last year (**↓0,3%**, y/y), but below the comparative levels of pre-pandemic 2019 (**↓7%**).

viii. International air industry

- In May 2025, global air cargo demand (CTK) increased by **↑2,2%** year-on-year; however, seasonally adjusted CTKs contracted by **↓1%** (m/m).
  - International CTK rose by **↑3%** (y/y), with most regions and routes posting single-digit gains, but Africa was down by **↓2,2%** (y/y).
  - Available cargo capacity (ACTK) expanded by **↑2%** (y/y), resulting in a steady cargo load factor of **44,5%** (**↑0,1%**).
  - Jet fuel prices remained **↓18,8%** lower (y/y), while average cargo rates fell **↓3,7%** (m/m) in May and **↓2,9%** (m/m), reflecting seasonal demand and tight capacity on key lanes.
- In the high-frequency metrics from World ACD, global air cargo tonnages rose **↑2%** week-on-week and **↑5%** year-on-year. Middle East and South Asia (MESA) volumes partially rebounded (**↑10%**, w/w) after sharp declines related to the Eid holiday and conflict earlier in June.
- Average global rates edged up **↑1%** (w/w) to **$2,43/kg** (but remained down by **↓1%** year-on-year).
- Flight operations in the Gulf are resuming gradually after the **Israel–Iran ceasefire**, though normal schedules may take weeks to restore.