

Cargo movement update¹

Date: 22 September 2023

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 (containers)	33 927	26 359	60 286	22 476	21 633	44 109	↑37%
Air Cargo (tons)	3 332	2 173	5 504	3 287	1 909	5 195	↑6%

Monthly Snapshot

Figure 1 – Monthly⁴ cargo volume levels, year on year (100% = baseline; >100% = growth)

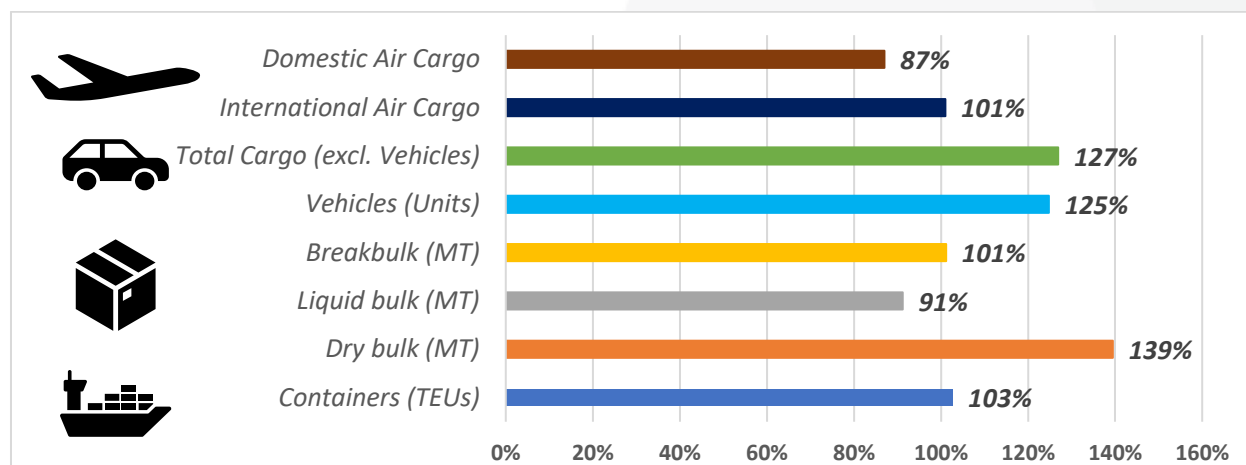
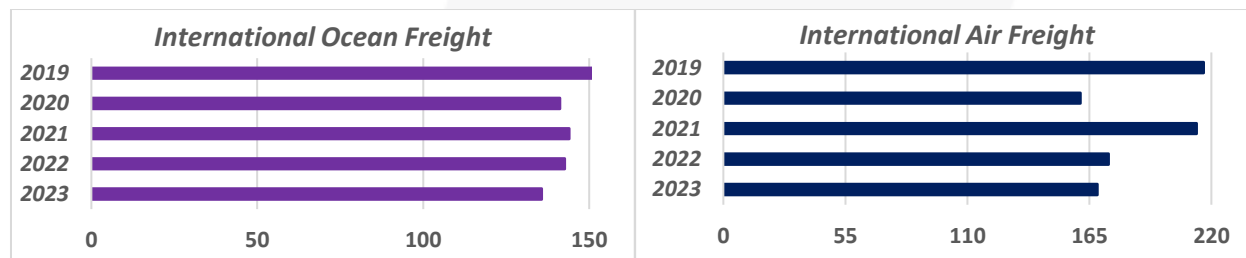


Figure 2 – Global year-to-date flows 2019-2023⁵: ocean, y/y (metric tonnes) & air freight, y/y (kg millions)



Key Notes

- An average of **~8 612 containers** was handled per day, with **~8 491 containers** projected for next week.
- TNPA stats for August: containers are up by **↑10%** (m/m) and **↑3%** (y/y) but down YTD by **↓2,8%** (y/y). Total bulk cargoes are down versus July (**↓1%**) but up by **↑27%** (y/y). Vehicles are up by **↑55%** (m/m).
- Rail cargo handled out of Durban amounted to **2 505 containers** per day, **↑9%** compared to last week.
- Cross-border queue times were **↓0,8 hours** (w/w), with transit times **↑0,3 hours** (w/w); SA borders decreased by **~36 minutes**, averaging **~10,8 hours** (**↓5%**); Other SADC borders averaged **~9,9 hours** (**↑5%**).
- Global freight rates decreased by another **↓5,2%** (or **\$829**) to **\$1 479** per 40-ft container this week.
- Global air cargo saw a **↑4%** (w/w) increase in tonnages, with a **↑1%** rise in air cargo prices to **\$2,31/kg**.

¹ This update contains a combined overview of air, sea, and road freight to and from South Africa in the last week. This report is the 155th update.

² 'Current' means the last 7 days' (a week's) worth of available data.

³ 'Previous' means the preceding 8-14 days' (a week's) worth of available data.

⁴ 'Monthly' means the last months' worth of available data compared to the same month in the previous year; Ocean: Aug vs Aug. Air: Aug vs Aug.

⁵ For ocean, total Jan-Jul cargo in metric tonnes, as reported by [Transnet](http://www.transnet.co.za) is used, while for air, Jan-Aug cargo to and from ORTIA is used.

Executive Summary

This update – *the 155th of its kind* – contains a consolidated overview of the South African supply chain and the current state of international trade. Commercial ports handled an average of **8 612 containers** per day – significantly up versus the lowly total of **6 301** last week. Nevertheless, port operations were characterised by inclement weather conditions, frequent equipment breakdowns and shortages, severe vessel ranging, and load-shedding. CTCT was affected by severe vessel ranging throughout the week, as one vessel lost approximately 64 operational hours. Adverse weather and high swells delayed at least 12 vessels in Durban, while operations at our Eastern Cape ports were extensively challenged by inclement weather and vessel ranging. TNPA has creditably completed the revetment project at Port of Port Elizabeth's Tanker Berth and Berth 14, three months ahead of schedule, which is widely welcomed by the owners/operators of bulk oil carriers and liquid nitrogen gas vessels. Additionally, intermittent cable theft occurred again on our rail network during the earlier stages of the week, which delayed operations for a few hours.

Sentiment in the container market trended negatively, facing challenges with throughput, capacity, and declining freight rates. Despite carriers' attempts to control capacity with blanked sailings, October hasn't yet shown any of the anticipated rate upswing. Planned capacity cuts during Golden Week – although significant in the current landscape – are smaller than those during the Lunar New Year and are, therefore, insufficient to halt the rate decline. Some carriers have already lowered rates to counter declining vessel utilisation, notably on the Asia-North Europe and US East Coast routes where load factors are at risk. Other developments include **(1)** carriers hit by rising fuel costs as OPEC cuts supply, and **(2)** Maersk insists the CMA CGM deal will not influence their green strategy.

On the air freight front, international air cargo to and from South Africa increased in the last week (**↑6%**) – led by outbound cargo (**↑12%**). Monthly figures for Cape Town show that international cargo increased by **↑4%** (m/m) and **↑37%** (y/y), while cargo at Durban cargo decreased by **↓5%** (m/m) but increased by **↑34%** (y/y). Internationally, the latest figures point to a **↑4%** increase in tonnages compared to the previous week, with a slight increase in capacity (**↑1%**) and a corresponding rise in average worldwide air cargo prices.

In regional cross-border road freight trade, average queue times decreased by **45 minutes**, while transit times were nearly **20 minutes** more compared to last week. The median border crossing times at South African borders decreased by **36 minutes**, averaging **~10,8 hours** (**↓5%**, w/w) for the week. In contrast, the greater SADC region (excluding South African controlled) increased by approximately **half an hour** and averaged **~9,9 hours** (**↑5%**, w/w). On average, two SADC border posts took more than a day to cross, notably Beitbridge and Kasumbalesa (the worst affected from the Zambian side at nearly two-and-a-half days). These two borders continue to be the slowest to cross throughout the SADC region. Further notable developments included **(1)** installing of "Gamma-Ray" scanners at several commercial borders continues to be discussed, and **(2)** the Kasumbalesa Southbound queue stretched a massive 50km long on 10 September.

In summary, South Africa's logistics network's struggles continue to be widely debated, especially in the public eye. Two notable developments received significant airtime this week, with Minister Gordhan's proposed restructuring of the governance of SOCs⁶ and Transnet's ownership of Durban's old airport⁷. Despite significant engagement between key stakeholders in the network – among them the NLCC

⁶ Paton, C. 18/09/2023. [Gordhan proposes biggest shake-up of state-owned companies since the 1990s.](#)

⁷ Cronje, J. 20/09/2023. [Fraud and 'illegal' tenants: Transnet's fraught ownership of Durban's old airport.](#)

partnership between the South African Government and business – many loose ends remain, which continue to inhibit even average operational performance from any network segments. Some positive developments – such as the increased container throughput reported by TNPA this week and improved equipment availability in Cape Town – provide some cause for optimism. Nevertheless, as we have often mentioned, logistics take place on a shared infrastructure with shared responsibility from all stakeholders. Therefore, we need improved performance and efficiency from all parties and segments in the network; otherwise, we will continue to lose as much as **R1 billion daily**⁸.

⁸ Excellent research by the Gain Group puts the current network inefficiency's cost at R1 billion loss to GDP per day, with rail the most significant contributor to the current transport and logistics malaise.

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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 and projections for the next seven days.

Table 2 – Container Ports – Weekly flow reported for 16 to 22 September⁹

7-day flow forecast (16/09/2023 – 22/09/2023)		
TERMINAL	NO. OF CONTAINERS ¹⁰ TO DISCHARGE (IMPORT)	NO. OF CONTAINERS TO LOAD (EXPORT)
DURBAN CONTAINER TERMINAL PIER 1:	4 295	5 078
DURBAN CONTAINER TERMINAL PIER 2:	19 281	11 715
CAPE TOWN CONTAINER TERMINAL:	4 757	4 887
NGQURA CONTAINER TERMINAL:	4 490	4 469
GQEBERHA CONTAINER TERMINAL:	1 104	210
TOTAL:	33 927	26 359

Source: Transnet, 2023. Updated 22/09/2023.

Table 3 – Container Ports – Weekly flow predicted for 23 to 29 September

7-day flow forecast (23/09/2023 – 29/09/2023)		
TERMINAL	NO. OF CONTAINERS TO DISCHARGE (IMPORT)	NO. OF CONTAINERS TO LOAD (EXPORT)
DURBAN CONTAINER TERMINAL PIER 1:	5 510	6 032
DURBAN CONTAINER TERMINAL PIER 2:	10 202	11 997
CAPE TOWN CONTAINER TERMINAL:	5 205	5 694
NGQURA CONTAINER TERMINAL:	5 903	5 192
GQEBERHA CONTAINER TERMINAL:	1 562	2 138
TOTAL:	28 382	31 053

Source: Transnet, 2023. Updated 22/09/2023.

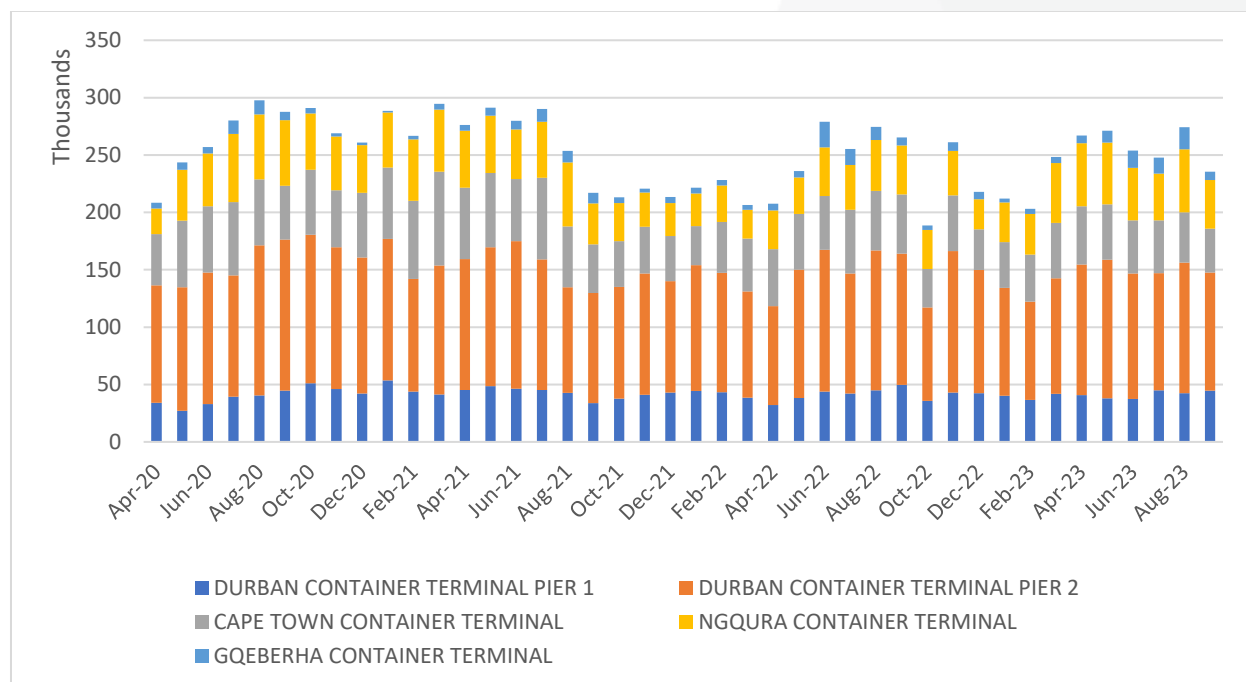
An average of **~8 612 containers** (↑37%) was handled per day for the last week (16 to 22 September, Table 2), compared to the projected average of **~8 129 containers** (↑6% actual versus projected – a first positive return since 20 January) noted in last week's report. For this week, a decreased average of **~8 491 containers** (↓1%) is predicted to be handled (23 to 29 September, Table 3). Port operations were characterised by poor weather conditions, frequent equipment breakdowns and shortages, severe vessel ranging, and load-shedding.

The following figure illustrates the rolling *monthly* average flow of aggregate containerised cargo passing through our commercial ports since our records began during the nationwide lockdown.

⁹ It remains important to note that a large percentage (approximately 37% according to the latest year-to-date TNPA figures) of containers is neither imported nor exported, but rather consists of empties and transshipments.

¹⁰ As mentioned before, in previous versions of the report, the measurement was incorrectly indicated as “TEUs”, when it should have been noted as containers (20’ and 40’). Incidentally, Transnet works on a ratio of approximately 1,4 TEUs per container and this figure will probably increase as the shift towards more 40’ containers continues. Incidentally, the US uses 1,5 to 1,8, depending on the port.

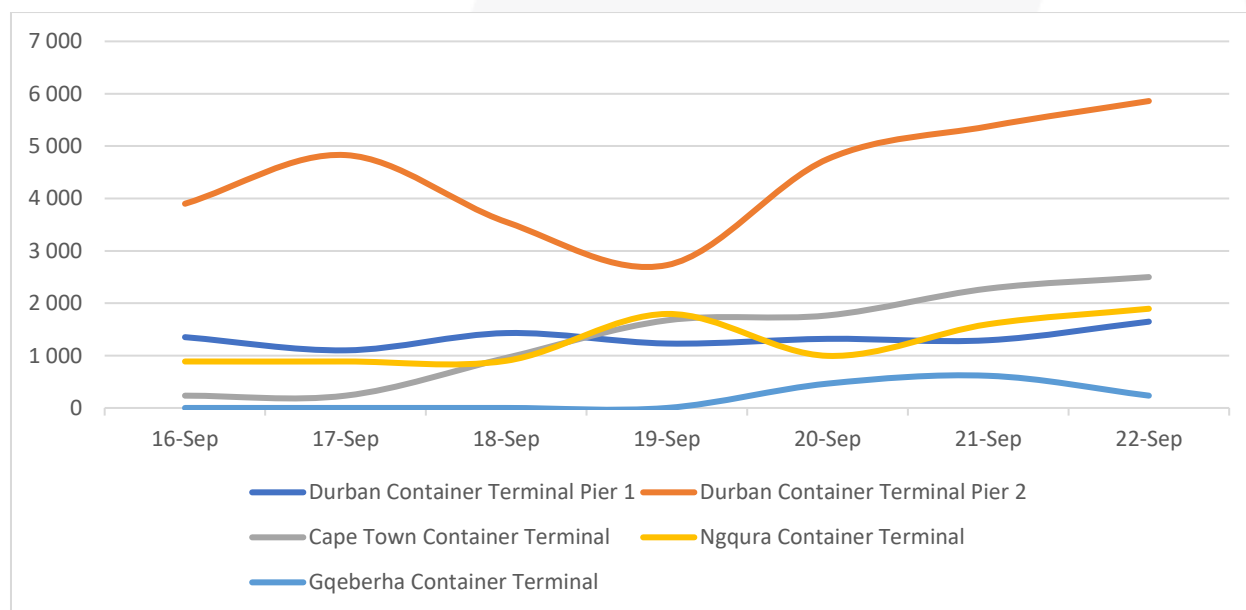
Figure 3 – Monthly flow reported for total cargo movement (containers April 2020 to present, m/m)



Source: Calculated using data from Transnet, 2023. Updated 22/09/2023.

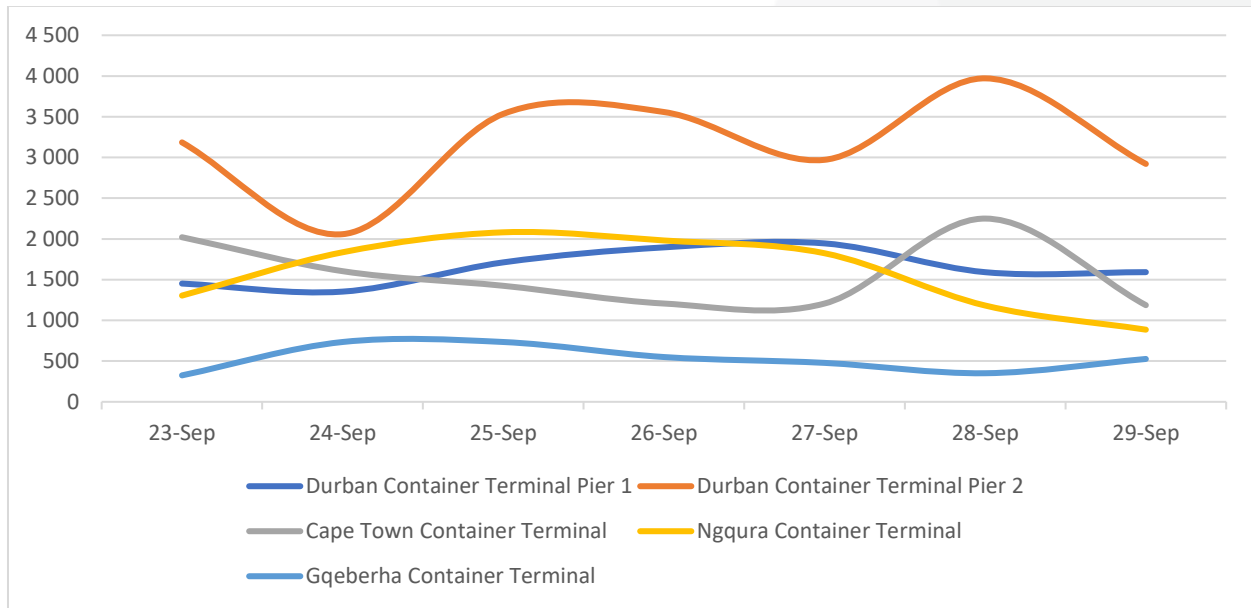
The following figures show the weekly container flows for the last seven days, followed by the projections for the seven days after that.

Figure 4 – 7-day flow reported for total container movements (16 to 22 September; per port; day on day)



Source: Calculated using data from Transnet, 2023. Updated 22/09/2023.

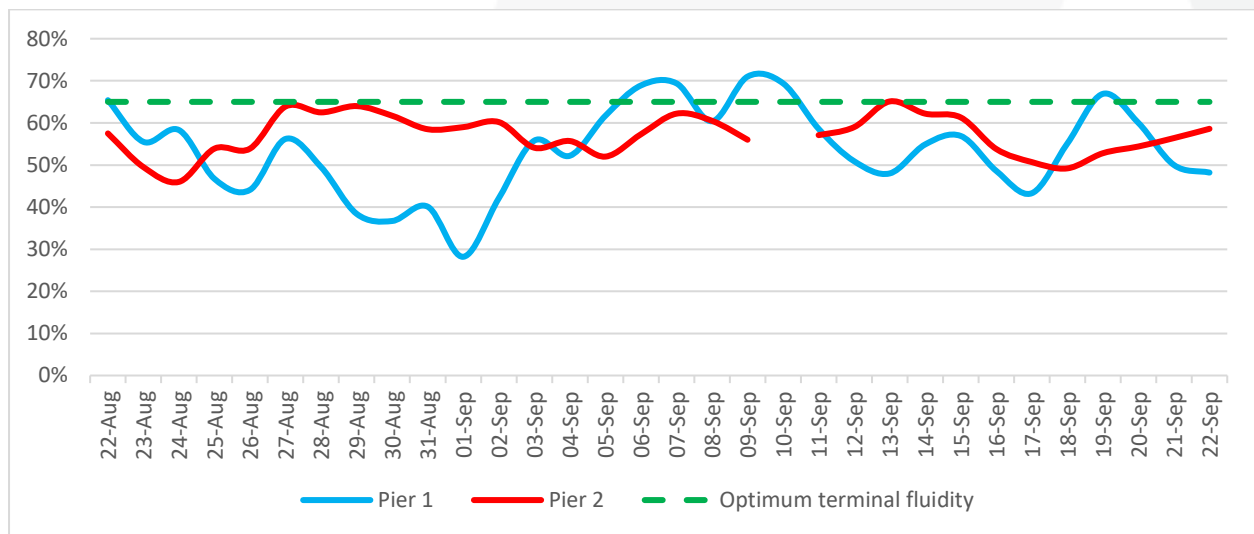
Figure 5 – 7-day forecast reported for total container movements (23 to 29 September; per port; day on day)



Source: Calculated using data from Transnet, 2023. Updated 22/09/2023.

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

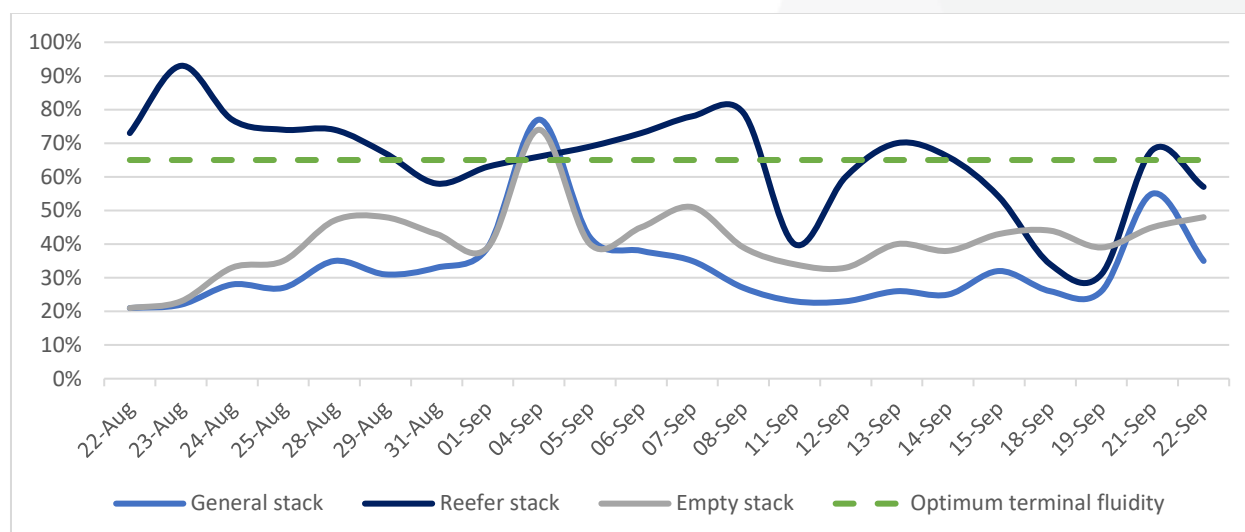
Figure 6 – Stack occupancy in DCT, general-purpose containers (22 August to present; day on day)



Source: Calculated using data from Transnet, 2023. Updated 22/09/2023.

The following figure shows daily stack occupancy in Cape Town over a similar period.

Figure 7 – Stack occupancy in CTCT, GP, reefer, and empty stack (22 August to present, day on day)



Source: Calculated using data from Transnet, 2023. Updated 22/09/2023.

b. TNPA: August update

Transnet National Ports Authority (TNPA) has released its consolidated monthly port statistics for August¹¹, with some segments showing improved results while others remained relatively subdued, notably in the bulk sectors. The headline figures show that container throughput increased by **↑10%** (m/m) – led by increases in imports (**↑15%**), while exports were slightly up versus last month (**↑5%**). Containers handled per terminal show some monthly increases at Durban (**↑14%**), Cape Town (**↑6%**), East London (**↑145%**), and Port Elizabeth (**↑14%**), whereas Ngqura (**↓9%**) handled a slight reduction in volumes for the second month in a row. In the bulk segments, total bulk cargo movements are slightly down by **↓1%** (m/m), with the most significant drop occurring with liquid cargoes (**↓30%**), whilst dry bulk (**↑8%**) and breakbulk volumes (**↑14%**) both saw positive returns from July:

Table 4 – TNPA – Volume and Growth: August 2023

	Jul	Aug	Movement	Monthly growth
Containers (TEUs)	374 956	411 327	36 371	10%
Landed	175 860	201 783	25 923	15%
Shipped	199 096	209 544	10 448	5%
Dry bulk (MT)	13 706 126	14 867 949	1 161 823	8%
Liquid bulk (MT)	4 378 574	3 049 996	-1 328 578	-30%
Breakbulk (MT)	496 126	566 605	70 479	14%
Vehicles (Units)	56 984	88 147	31 163	55%
Total cargo (excl. Vehicles)	18 580 826	18 484 550	-96 276	-1%

Source: [TNPA](https://www.tnpa.co.za), updated 22/09/2023.

In summary, Transnet Port Terminal handled **18,5 million metric tonnes** during August, roughly similar to July. However, year-to-date averages (**17 million**) remain significantly down on the 10-year monthly average

¹¹ Transnet. 2023. Port statistics. [TNPA](https://www.tnpa.co.za)

of **18,3 million**. With containers, the cyclically average for August is around **406 000 TEUs** in the seven years, including this. Consequently, August 2023 is around **~101%** of the long-term average. The following table shows the comparative overview for August since the pandemic, with 2023 compared to the same month in 2022, 2021 and 2020:

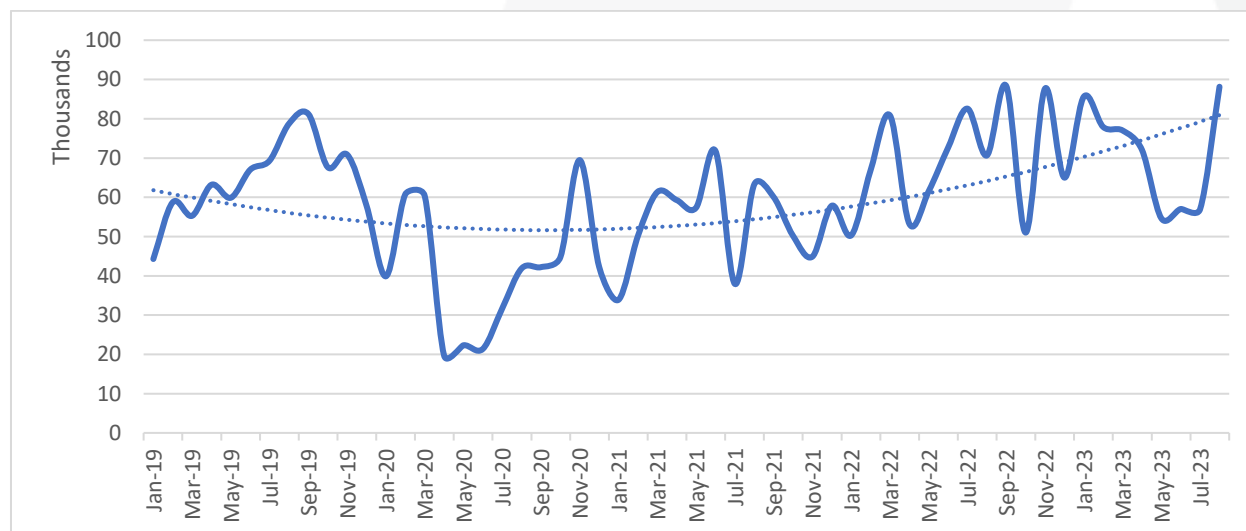
Table 5 – TNPA – Volume and Growth: August 2020-2023

	2020	2021	2022	2023	Growth: '22-'23	Growth: '21-'23	Growth: '20-'23
Containers (TEUs)	354 015	330 109	400 847	411 327	3%	25%	16%
Landed	178 047	182 432	190 807	201 783	6%	11%	13%
Shipped	175 968	147 677	210 040	209 544	0%	42%	19%
Dry bulk (MT)	14 565 868	15 407 400	10 660 495	14 867 949	39%	-4%	2%
Liquid bulk (MT)	3 343 442	4 160 245	3 344 557	3 049 996	-9%	-27%	-9%
Breakbulk (MT)	365 520	341 554	560 015	566 605	1%	66%	55%
Vehicles (Units)	41 890	63 277	70 648	88 147	25%	39%	110%
Total cargo (excl. Vehicles)	18 274 830	19 909 199	14 565 067	18 484 550	27%	-7%	1%

Source: TNPA, updated 22/09/2023.

Yearly figures for the primary industries indicate the following: containers (**↑3%**, y/y), total cargo handled (**↑27%**), dry bulk (a healthy **↑39%**), liquid bulk (**↓9%**), breakbulk (**↑1%**), and vehicles (**↑27%**). Indeed, the longer-term trends for vehicle trade remain healthy and are trending upwards:

Figure 8 – Total vehicles handled at SA Ro-Ro terminals (units, 2019 to present)



Source: TNPA, updated 22/09/2023.

All-in-all, August shows that Transnet experienced an improved month in terms of throughput performance. However, because of the widespread equipment shortages and poor weather, as subsequently reported in September, we expect the returns to be somewhat subdued next month. Nevertheless, despite the decent month for most segments – including containers – the year-to-date figures show that the current narrative remains concentrated on "average" and "similar", showing that there has been no tangible and sustainable growth in especially containers. This lack of real growth is particularly evident in container trade when looking at the year-to-date views – starting with the pre-pandemic levels of 2019:

Table 6 – TNPA – Volume: YTD January-August 2019-2023: Containerised cargo

	2019	2020	2021	2022	2023
	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL
LANDED:					
DEEPSEA	1 234 074	1 059 530	1 192 465	1 214 086	1 185 319
COASTWISE	31 872	29 275	26 753	37 098	30 836
TRANSHIPPED ¹²	293 798	235 158	276 072	240 039	181 458
TOTAL LANDED	1 559 744	1 323 963	1 495 290	1 491 223	1 397 613
SHIPPED:					
DEEPSEA	1 156 413	1 064 523	1 163 156	1 186 401	1 203 812
COASTWISE	21 196	26 757	26 653	26 657	44 174
TRANSHIPPED	298 114	232 244	265 241	207 189	183 482
TOTAL SHIPPED	1 475 723	1 323 524	1 455 050	1 420 247	1 431 468
GRAND TOTAL	3 035 467	2 647 487	2 950 340	2 911 470	2 829 081

Source: [TNPA](#), updated 22/09/2023.

Compared to last year, total containers shipped are up by **↑0,8%** (y/y) – but led by an increase in empties (**↑2,9%**), with total containers landed down by a considerable **↓6,3%** (y/y), with total container trade down by **↓2,8%** (y/y). Versus the pre-pandemic year of 2019, the picture becomes bleaker, as total containers shipped are down by **↓3,0%** (y/y), with total containers landed down by **↓10,4%** (y/y), with total container trade down by **↓6,8%** (y/y). The South African container trade industry urgently needs efficiency and improved productivity to revitalise its foreign trade, especially as global markets rebound strongly post-pandemic. Despite a global recovery, South Africa's trade prospects are at risk due to low volumes and underperforming ports.

c. Summary of port operations

The following sections provide a more detailed picture of the operational performance of our commercial ports over the last seven days.

i. Weather and other delays

- Strong winds and rain produced several problems:
 - Severe vessel ranging cost operational performance dearly in Cape Town this week.
 - Adverse weather and high swells delayed at least 12 vessels in Durban.
 - Operations at our Eastern Cape ports were extensively challenged by poor weather.
 - Minimal delays were reported at the Port of Richards Bay.

ii. Cape Town

On Thursday, CTCT recorded three vessels at berth and two at anchor, with three vessels outside seeking refuge at more sheltered locations, such as St Helena Bay. Earlier this week, the Maersk Sofia decided to "cut and run" from Cape Town to maintain the rest of her schedule. In contrast, the Maersk Sheerness decided to omit the port entirely after being delayed for around 17 days. Stack occupancy for GP containers was recorded at 35%, reefers at 68%, and empties at 55%. In the latest 24-hour period to Thursday, the

¹² 'Transhipped' means an act of off-loading cargo from one ship (generally at a hub port) and loading it onto another ship to be further carried to the final port of discharge. In the process, the cargo is often held at the transshipment port for a period.

terminal handled 1 279 TEUs across the quay as operational performance remains below par. 599 trucks were serviced on the landside, while 151 rail import containers were on hand, with only one destined for export markets. Furthermore, the terminal was affected by extended vessel ranging throughout the week, as one vessel lost approximately 64 operational hours.

Crane LC4 at CTCT is still out of commission and undergoing chain repairs. The technical team were busy testing the crane earlier this week when they found an additional problem on the machine. No estimated time of return is available just yet, but at this point, it hardly matters since the lack of serviceable shore-side equipment would not allow the full complement of cranes to be utilised in any case. Additionally, of the 13 replacement RTG engines discharged in Cape Town a few weeks ago, two have been installed thus far, with the two additional RTGs being tested before their return to service. TNPA further stated that the new engines for the remaining 5 RTGs will be delivered by the end of September, and the installation will be concluded by mid-October 2023. The refurbishment of five additional RTGs through the OEM has been awarded, with a lead time of eight months for commissioning.

The multi-purpose terminal, on Thursday, recorded zero vessels at anchor and one at berth. In the prior 24 hours, the terminal managed to service 119 external trucks at an undisclosed truck turnaround time on the landside. During the same period, 188 moves were executed across the quay on the waterside. Stack occupancy was recorded at 36% for GP containers, 43% for reefers, and 26% for empties during the same period.

The FPT private terminal reported zero vessels at anchorage while servicing four vessels at berth on Wednesday. During the 24 hours leading to Thursday, the terminal handled 68 TEUs and 1 392 pallets of fruit on the waterside while servicing 201 trucks on the landside. At the same time, reefer stack occupancy was recorded at 36%.

iii. Durban

Pier 1 on Wednesday recorded two vessels at berth, operated by five gangs, and two vessels at anchor. Stack occupancy was 50% for GP containers and remained undisclosed for reefers. During the same period, 951 imports were on hand, with 28 units having road stops and 48 unassigned. Despite losing a few hours to strong winds, the terminal recorded 1 086 landside gate moves, with an undisclosed number of cancelled and wasted slots. The truck turnaround time was recorded at ~90 minutes, with an average staging time of ~98 minutes.

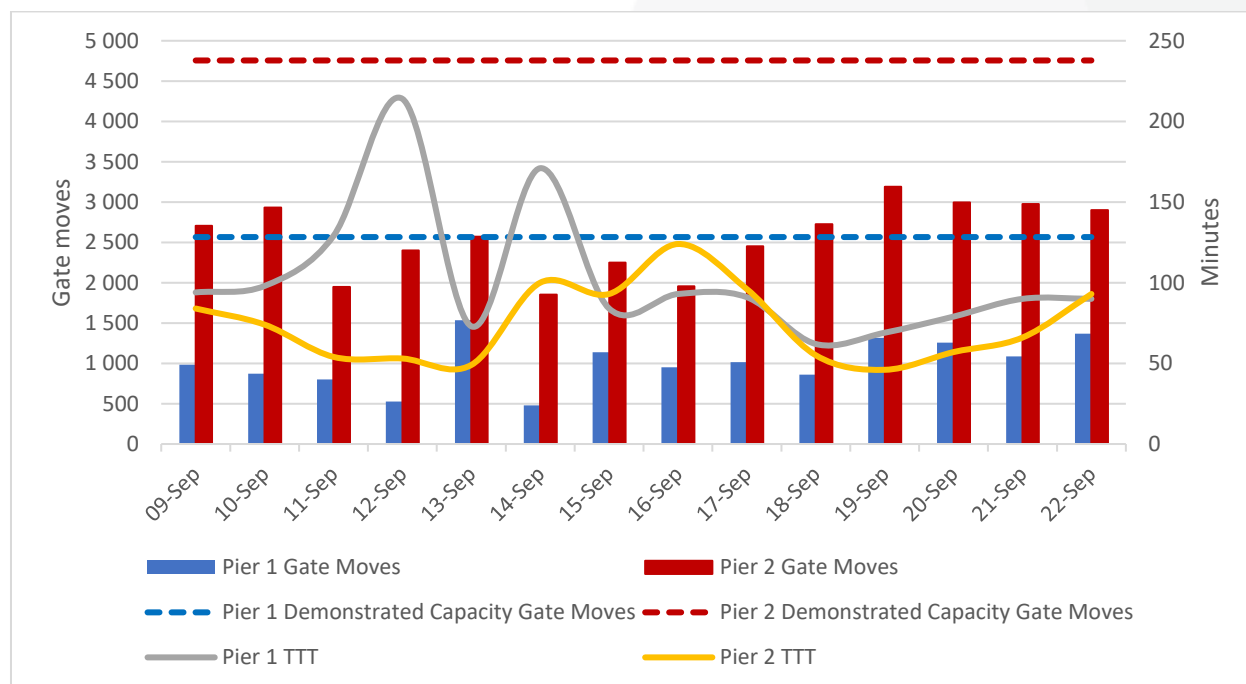
Pier 2 had four vessels at berth and four at anchorage on Thursday. In the prior 24 hours, stack occupancy was 56% for GP containers and 33% for reefers, with 34% of reefer ground slots utilised. The terminal operated with 11 gangs while moving 3 025 TEUs across the quay despite also losing a few hours to adverse weather. During the same period, there were 2 977 gate moves on the landside with a truck turnaround time of ~66 minutes and a staging time of ~62 minutes. Of the landside gate moves, 1 615 (54%) were for imports and 1 362 (48%) for exports. Additionally, 798 rail import containers were on hand, with 291 moved by rail. On Thursday, the terminal had 14 out-of-gauge import containers on hand, with four rail units having a high dwell time of 14 days.

Durban's MPT terminal recorded three vessels at berth on Thursday and one at outer anchorage while handling 748 TEUs and 3 293 breakbulk tons on the waterside. Stack occupancy for breakbulk was recorded at 50% during that time and at 71% for containers, with 11 reefer plug points available. The terminal handled 603 container road slots and 53 breakbulk RMTs containing 1 520 tons on the landside. During the same period, two cranes, six reach stackers, eight forklifts and 16 ERFs were in operation.

On Wednesday, the Ro-Ro terminal in Durban recorded one vessel on the berth, with four at outer anchorage. Adverse weather and high swells prevented vessels from berthing towards the latter end of the week. Over the prior 24 hours, the terminal managed to handle 964 units. During the same period, general stack occupancy was recorded at 95%, comprising 19% imports, 75% exports, and 6% transshipments. The terminal had 11 363 import units on hand, 8 486 units were destined for export markets, and 679 were subject to transshipments. Stack occupancy at G-berth was also very high at 90%, and Q/R at 80%.

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. The increased throughput at both piers is noticeable, but this comes off an abysmally low base. As shown below, the volume handled still fell significantly short of the respective demonstrated capacity:

Figure 9 – Gate moves (left axis) and time spent in the terminal (in minutes, right axis)



Source: Calculated using data from Transnet, 2022. Updated 22/09/2023.

iv. Richards Bay

On Thursday, Richards Bay recorded 15 vessels at anchor: six destined for DBT, four for MPT, four for RBCT, and one for liquid. The port also recorded 12 vessels on berth, translating to four at DBT, five at MPT, two at RBCT, and one at the liquid bulk terminal. Two tugs and one helicopter were in operation for marine resources in the 24 hours leading to Friday. The pilot boat remains in Durban. However, this week, TNPA mentioned that a pilot boat will be sourced from Cape Town to aid waterside operations between Durban and Richards Bay.

v. Eastern Cape ports

NCT on Tuesday recorded three vessels on the berth and no vessels at the outer anchorage. Marine resources of one tug, a pilot boat, two pilots, and one berthing gang were in operation in the 24 hours leading up to Wednesday. In the same period, stack occupancy was 26% for GP containers, 46% for reefers, and 35% for reefer ground slots. In that period, despite the adverse weather experienced, 1 615 TEUs were processed at a poor GCH of ~13 and SWH of ~27. Additionally, 629 reefers were handled, while 360 trucks were serviced

on the landside at a truck turnaround time of ~25 minutes. The tug made its welcome return to service by the end of the week.

GCT on Thursday recorded zero vessels at outer anchorage and one at berth. Available waterside resources were two tugs, a pilot boat, two pilots, and one berthing gang in the 24 hours to Friday. In the same period, stack occupancy was recorded at 45% for GP containers, 32% for reefers, and 66% for reefer ground slots. On the waterside, 533 TEUs were handled across the quay at a GCH of ~13 and SWH of ~20. Additionally, 160 trucks were serviced on the landside at a truck turnaround time of ~21 minutes.

TNPA has completed the revetment project at Port of Port Elizabeth's Tanker Berth and Berth 14 three months ahead of schedule, which is widely welcomed by the Bulk Oil Carriers and Liquid Nitrogen Gas vessels. A revetment is a barricade provided with rock armour to scatter incoming wave energy and prevent erosion of an embankment.

On Monday, the Port of East London had three vessels on berth and none at anchor. In the 24 hours to Tuesday, on the waterside, 648 containers were moved across the quay at a GCH of ~18, while 37 external trucks were serviced on the landside at a truck turnaround time of ~14 minutes. Stack occupancy on the container side was recorded at 53%. During the same period, at the Ro-Ro terminal, 209 units were received, leading to a stack occupancy figure of 105%. 179 bulk tons were handled on the waterside at a TPH of ~187, while no RMTs were serviced on the landside.

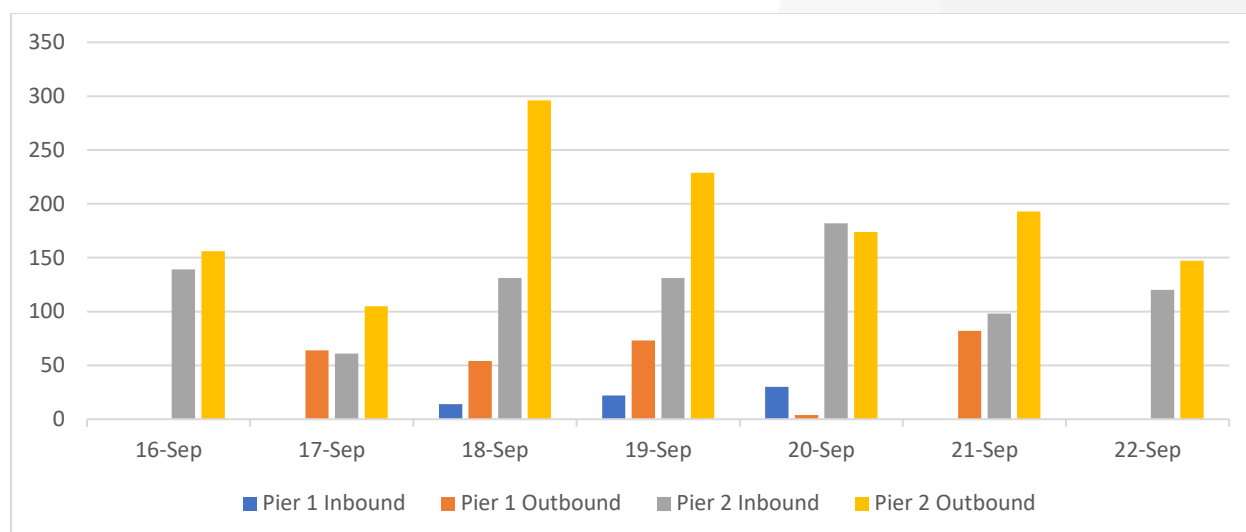
vi. Saldanha Bay

On Friday, the iron ore terminal had three vessels at anchorage and two vessels on the berth, while the multi-purpose terminal had three on the berth and four waiting at anchor. The vessels at anchor have been waiting outside for approximately 4-8 days, while those in the port have been on berth for between 4 and 6 days.

vii. Transnet Freight Rail (TFR)

Intermittent cable theft occurred again on our rail network during the earlier stages of the week, which delayed operations for a few hours. However, TFR is currently working on mitigating the situation and ensuring it does not reach the severe levels seen earlier this year. Additionally, this week, TFR indicated that the line, affected by the Port of Port Elizabeth Railway Line Washaway Incident, is back in service. The latest reports indicate that DCT Pier 2 had 535 ConCor units on hand with a dwell time of 96 hours (4 days) and 250 over-border units with a dwell time of 52 days by the end of the week. Lastly, TFR announced several incidents of reduced operating hours over the long weekend, notably at Pretcon, Bayhead, and Belcon. Durban Point will continue working throughout the long weekend, as will City Deep/Kascon.

Figure 10 – TFR: Rail handled (Pier 1 and Pier 2)



Source: Calculated using data from Transnet, 2022. Updated 22/09/2023.

In the last week (16 to 22 September), rail cargo handled out of Durban was reported at **2 505** containers, down **↑9%** from the previous week's **2 378** containers.

2. Air Update

a. International air cargo

The following table shows the in- and outbound air cargo flows to and from ORTIA for the week beginning 11 September. For comparative purposes, the average air freight cargo (inbound and outbound) handled at ORTIA in September 2022 averaged **~764 378 kg** per day.

Table 7 – International inbound and outbound cargo from OR Tambo¹³

Flows	11-Sep	12-Sep	13-Sep	14-Sep	15-Sep	16-Sep	17-Sep	Week
Volume inbound	497 791	415 500	297 153	319 607	430 185	267 331	1 104 022	3 331 589
Volume outbound	210 084	416 371	218 943	221 733	271 088	195 618	638 781	2 172 618
Total	707 875	831 871	516 096	541 340	701 273	462 949	1 742 803	5 504 207

Courtesy of ACOC. Updated: 19/09/2023.

The daily average volume of air cargo handled at ORTIA the previous week amounted to **475 941 kg** inbound (**↑1%**, w/w) and **310 374 kg** outbound (**↑14%**), resulting in an average of **786 315 kg per day** or around **~103%** compared with in September 2022. However, the level is currently at only **~84%** compared with the same period pre-pandemic in 2019 but continues to trend upwards slowly.

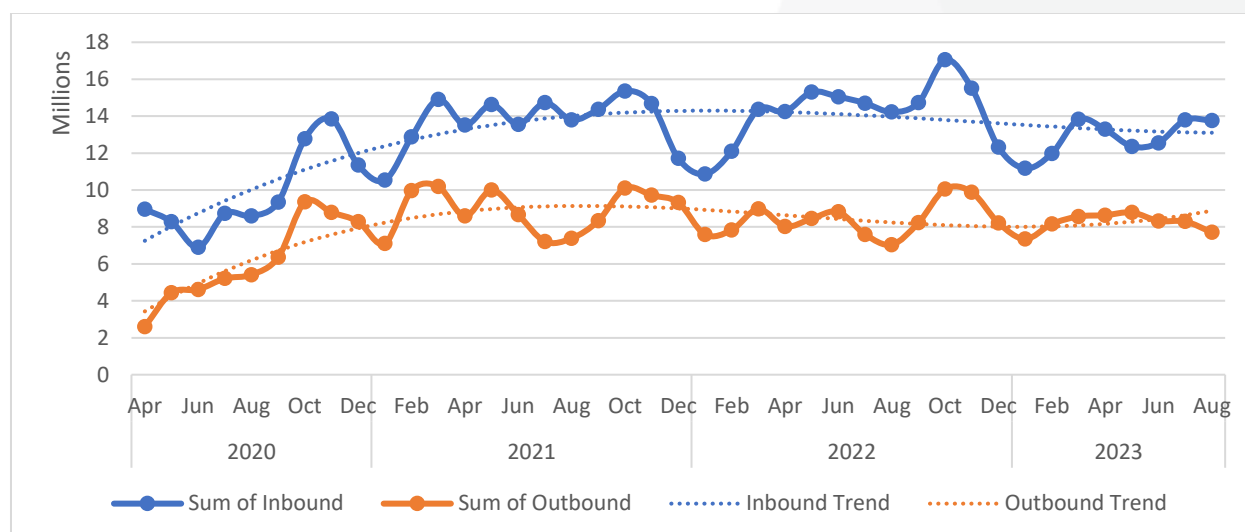
For the other two international airports, cargo handled in August shows the following:

- Cape Town cargo increased by **↑4%** (m/m) and **↑37%** (y/y).
- Durban cargo decreased by **↓5%** (m/m) but increased by **↑34%** (y/y).

The following graphs show the movement since the pandemic's onset for ORTIA:

¹³ Only ORTIA's international volumes are shown. ORTIA handles ~87% of international cargo to and from South Africa.

Figure 11 – International cargo from OR Tambo – volumes per month (kg millions)



Courtesy of ACOC. Updated: 19/09/2023.

b. Domestic air cargo

The following table shows the domestic inbound and outbound air cargo flows as reported by the industry. By way of comparison, the average domestic air freight cargo (inbound and outbound) handled in *September 2022* was **~66 903 kg** per day.

Table 8 – Total domestic inbound and outbound cargo (average daily)

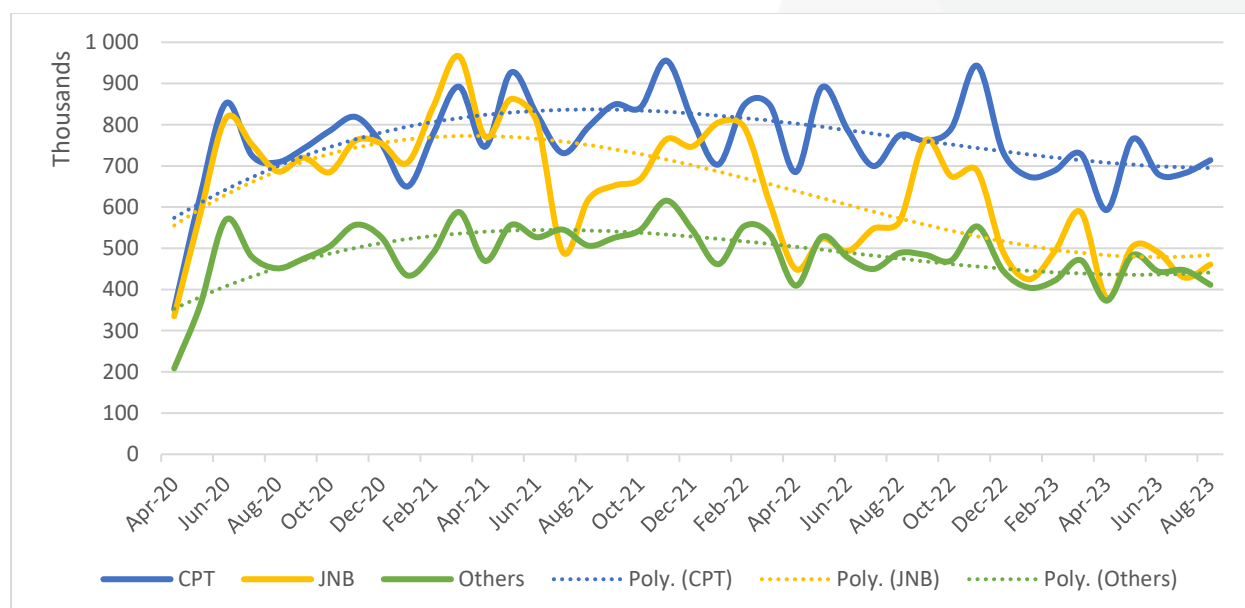
DATE / AIRPORT	CPT	DUR	ELS	JNB	PLZ	OTHERS	TOTAL
Apr-Dec '20 Ave.	22 928	2 514	3 441	21 890	5 818	3 141	59 733
2021 Average	26 852	3 776	3 474	24 379	6 828	3 309	68 619
2022 Average	25 922	3 263	3 232	20 278	6 633	2 909	62 237
Jan-Jun '23 Ave.	22 690	2 770	2 632	15 821	6 177	2 691	52 781
July Ave.	22 006	2 645	2 737	13 836	6 513	2 517	50 255
Aug Ave.	23 029	2 477	2 505	14 863	5 709	2 573	51 157
Sep Ave.	22 860	3 029	2 705	15 845	6 657	2 975	54 071
Total for 2023:	5 708 496	687 211	663 205	3 895 767	1 556 434	671 336	13 182 449

Courtesy of ACOC. Updated: 19/09/2023.

The average domestic air cargo moved so far in September is **~54 071 kg** per day, up by **↑6%** compared to August but and remains slightly down compared to last year's level (**~81%**)¹⁴. However, the level is currently at **~61%** compared with the same period pre-pandemic in 2019.

¹⁴ A weekly update will once again be provided next week.

Figure 12 – Domestic inbound and outbound cargo (thousands)



Courtesy of ACOC. Updated: 19/09/2023.

3. Road and Regional Update

a. Cross-border and road freight delays

FESARTA has shared the consolidated cross-border road freight statistics for our major borders for August:

- Beitbridge volume decreased slightly (**↓1%**) compared to July (**↓3%** northbound and **↑1%** southbound), with around **26 025** heavy goods vehicles (HGVs) flowing through the gates. Overall, crossing times (queue and border) increased from last month and averaged around **22,2 hours** during the month (which remains way too slow).
- Lebombo traffic remains elevated but has not been shared this month, as management said they would no longer release the daily numbers. It is difficult to understand why since these numbers can usually be accessed through other sources. The indications are that around **42 000** HGVs moved between Mozambique and South Africa in August.
- Groblersbrug traffic increased by **↑2%** to **12 614 HGVs** in August, with average crossing times into Namibia improving slightly and currently averaging **14,3 hours**, down by nearly 6 hours from July, which is a positive sign.

This week, the following points should be noted in terms of challenges and delays on roads in South Africa and the surroundings in the SADC region.

- The median border crossing times at South African borders decreased by **36 minutes**, averaging **~10,8 hours (↓5%, w/w)** for the week. In contrast, the greater SADC region (excluding South African controlled) increased by approximately **half an hour** and averaged **~9,9 hours (↑5%, w/w)**.
- Last week, the government appealed to the private sector to install "Gamma-Ray" scanners at several commercial borders (Beitbridge, Lebombo, Maseru Bridge, Ficksburg, Kopfontein, and Oshoek).
 - An American company did submit a proposal for these scanners, but they have limited throughput, handling no more than 40 vehicles per hour, primarily used at ports for containers.

- Zim borders recently acquired Nuctech MT1213DE drive-thru scanners for both directions, capable of handling 200 trucks a day, more than triple the capacity of the American proposal.
- Regionally, the Kasumbalesa Southbound queue stretched 50km long on 10 September. Although the Mutaka scanner was shut down, the DRC side of the border did not operate 24/7.
 - Through agreements with the government, efforts are underway to address the situation and improve Kasumbalesa.
- As always, transporters, traders, and cargo owners are encouraged to use the non-tariff barrier (NTBs) [online tool](#) developed by UNCTAD and the AfCFTA Secretariat. However, given the questionable effectiveness of this platform, transporters are encouraged to contact FESARTA and join their [TRANSIST Bureau](#)¹⁵, which arguably provides better and more reliable information.

The following table shows the changes in bidirectional flows through South African borders – now with Ramatlabama also included:

Table 9 – Delays¹⁶ summary – South African borders (both directions)

Border Post	Direction	HGV ¹⁷ Arrivals per day	Queue Time (hours)	Border Time – Best 5% (hours)	Border Time – Median (hours)	HGV Tonnage per day	Weekly HGV Arrivals
Beitbridge	Zimbabwe-SA	387	0,5	2,1	17,0	11 610	81 270
Beitbridge	SA-Zimbabwe	413	6,2	8,3	24,0	12 390	86 730
Groblersbrug	SA-Botswana	235	1,1	13,0	20,3	7 050	49 350
Groblersbrug	Botswana -SA	148	0,5	0,4	2,2	4 440	31 080
Ramatlabama	SA-Botswana	45	0,6	0,0	0,0	1 350	9 450
Ramatlabama	Botswana -SA	45	0,1	0,0	0,0	1 350	9 450
Noordoewer	Namibia-SA	20	0,4	0,4	1,3	600	4 200
Vioolsdrift	SA-Namibia	30	1,4	1,2	3,4	900	6 300
Ariamsvlei	Namibia-SA	20	0,2	0,4	1,2	600	4 200
Nakop	SA-Namibia	30	0,3	1,3	7,4	900	6 300
Skilpadshek	Botswana -SA	200	1,6	1,1	2,2	4 800	33 600
Pioneer Gate	SA-Botswana	100	0,6	2,2	10,0	2 400	16 800
Lebombo	SA-Mozambique	1 610	4,4	0,4	5,1	48 300	338 100
Ressano Garcia	Mozambique-SA	89	4,4	2,2	10,3	2 670	18 690
Weighted Average/Sum		3 372	1,6	2,4	7,5	99 360	695 520

Source: TLC, FESARTA, & Crickmay, week ending 17/09/2023.

Table 10 – Delays summary – Corridor perspective

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	HGV Tonnage per day	Weekly HGV Arrivals
Beira Corridor	320	3,2	3,4	20,3	9 600	2 240
Dar Es Salaam Corridor	1 819	44,9	3,3	23,3	54 570	12 733
Maputo Corridor	1 699	4,4	1,3	7,7	50 970	11 893

¹⁵ FESARTA TRANSIST Bureau.

¹⁶ It should be noted that the root cause of the reported delays is uncertain at this point. Moreover, the delays may be multiple and widely distributed. Therefore, they cannot be exclusively attributed to a specific common cross-border problem since we do not have a transparent view of the entire border process in granular detail. The causes of these bottlenecks typically include poor infrastructure, road congestion, and a lack of coordination between neighbouring countries and Customs (or OGA) stops, among other trade obstacles. Data provided by the LMS (Logistics Monitoring System), which is produced by Crickmay in collaboration with SAAFF.

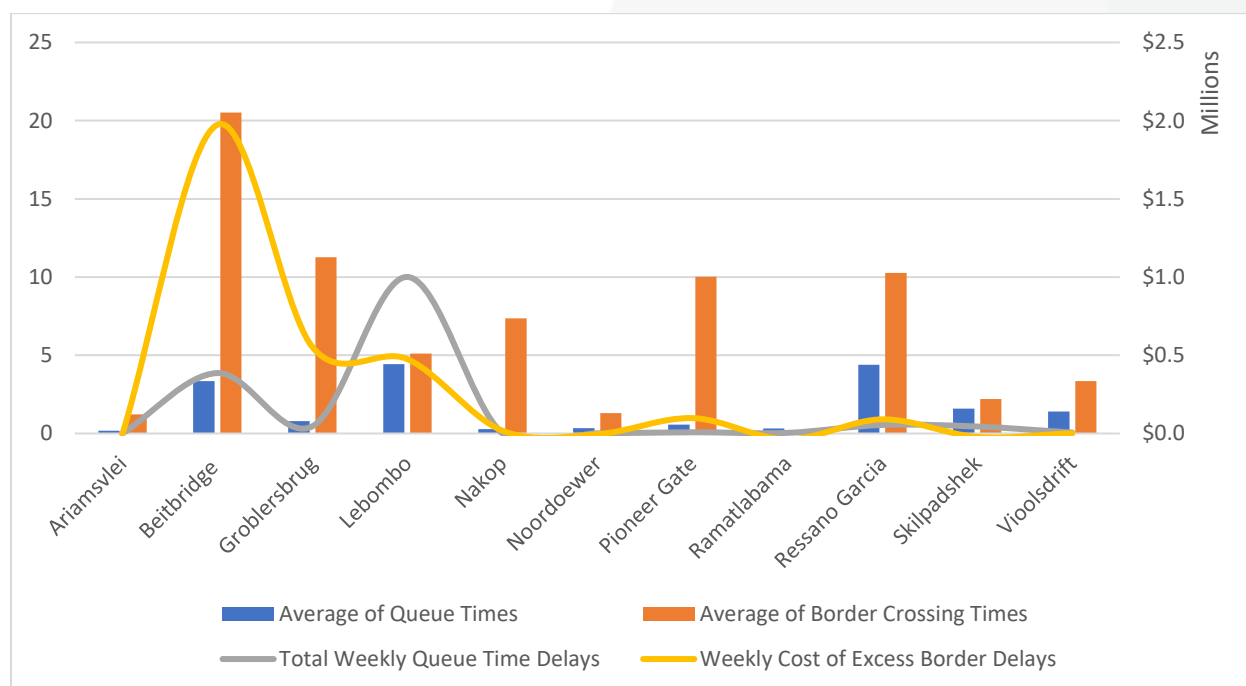
¹⁷ Heavy Goods Vehicles. Note: These statistics are rolling averages; therefore, they would not typically change weekly, rather monthly.

Corridor	HGV Arrivals per day	Queue Time	Border Time – Best 5%	Border Time – Median	HGV Tonnage per day	Weekly HGV Arrivals
Nacala Corridor	127	0,0	0,0	0,0	3 810	889
North/South	3 345	15,4	2,3	11,9	76 860	23 415
Trans Caprivi Corridor	116	0,0	0,0	0,0	3 480	812
Trans Cunene Corridor	100	0,0	0,0	0,0	3 000	700
Trans Kalahari Corridor	330	1,4	1,2	4,5	7 920	2 310
Trans Oranje Corridor	100	0,6	0,8	3,3	3 000	700
Weighted Average/Sum	7 956	12,9	1,8	10,0	213 210	55 692

Source: TLC, FESARTA, & Crickmay, week ending 17/09/2023.

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

Figure 13 – Weekly cross-border delays & est. cost from a SA border perspective (hours & \$ millions¹⁸)

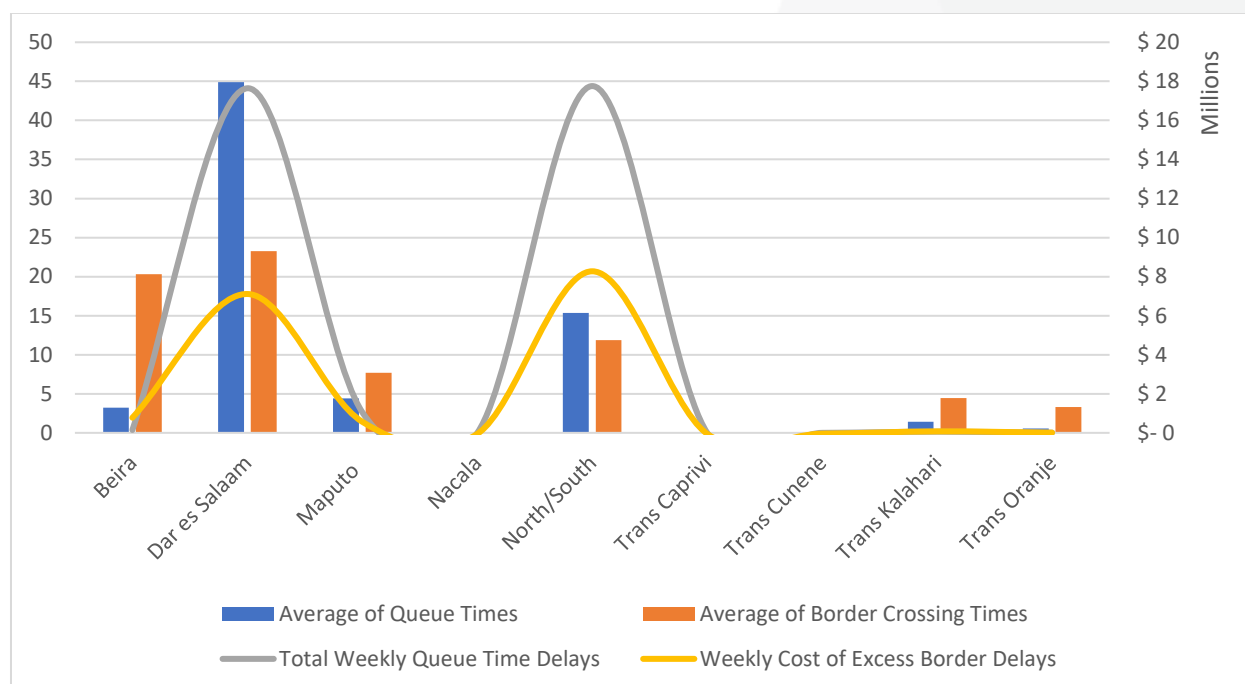


TLC, FESARTA, & Crickmay, week ending 17/09/2023.

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

¹⁸ Currency adjusted weekly. The prevailing ZAR/US\$ exchange rate at noon every Friday is used.

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



Source: TLC, FESARTA, & Crickmay, week ending 17/09/2023.

In summary, cross-border queue time averaged **~12,9 hours** (down by **~0,8 hours**, unchanged from the previous week's **~13,7 hours**), indirectly costing the transport industry an estimated **\$36,7 million (R687 million)**. Furthermore, the week's average cross-border transit times hovered around **~10,0 hours** (up by **~0,3 hours** from the **~9,7 hours** recorded in the previous report), at an indirect cost to the transport industry of **\$16,7 million (R313 million)**. As a result, the total indirect cost for the week amounts to an estimated **~\$52,5 million (~R1 billion, up by ~R60 thousand or ↑0,1% from ~R1 billion in the previous report)**.

4. International Update

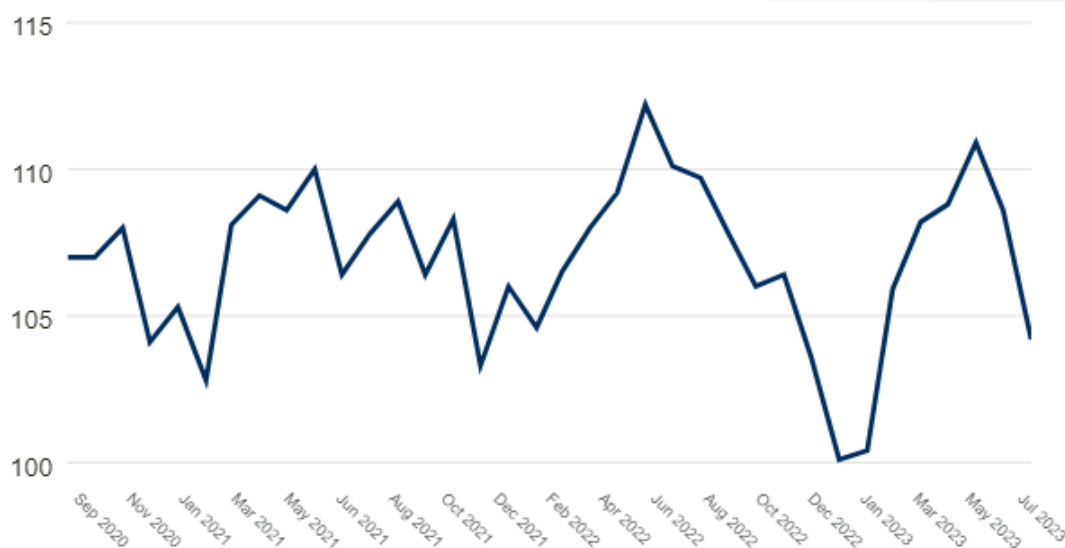
The following section provides some context around the global economy and its impact on trade, including an update on **(a)** the global shipping industry and **(b)** the global aviation industry.

a. Global shipping industry

i. Global container throughput

The global "Container Port Throughput Index" fell **↓2,1% (m/m)** in July 2023, with the small rises recorded in Africa and Oceania having been insufficient to counterbalance the monthly decline in throughput registered in Greater China, Asia (excluding China), North America and Europe. Drewry's *Nowcasting Model* indicated that the index will have fallen further in August, dropping **↓4,1% (m/m)** in August 2023. The rolling 12-month average growth rate fell to **↓1,2%** in July 2023, and the Nowcast Model indicates that the downward trajectory will be maintained into August.

Figure 15 – Drewry Global Container Port Throughput Index - 22 September 23



Source: [Drewry](https://www.drewry.com/)

In July 2023, the Greater China index decreased by **↓3,3%** (m/m) but increased by **↑1,0%** year-on-year, following a **↑5,2%** monthly increase in June. Meanwhile, the Greater China Container Port Performance Index fell **↓1,3%** (m/m) in August, primarily due to a **↓3,5%** (m/m) reduction in pre-berth waiting time, which should bode well for the index in the coming months.

The North American index dropped **↓3,1%** (m/m) and a massive **↓15,0%** (y/y) in July. West Coast ports – including Los Angeles, Long Beach, and Vancouver – reported significant volume losses attributed to industrial action, with Vancouver's throughput plunging by **↓35,4%**.

The European Container Port Throughput Index also declined, falling **↓2,3%** (m/m) in July, reaching **99,5** points, and standing **↓3,1%** below the previous year's figure. Weak demand affected European ports, with notable declines in Barcelona, Valencia, and Antwerp-Bruges in July 2023, as mentioned last week with the top 30 port terminal comparison provided by Alphaliner¹⁹.

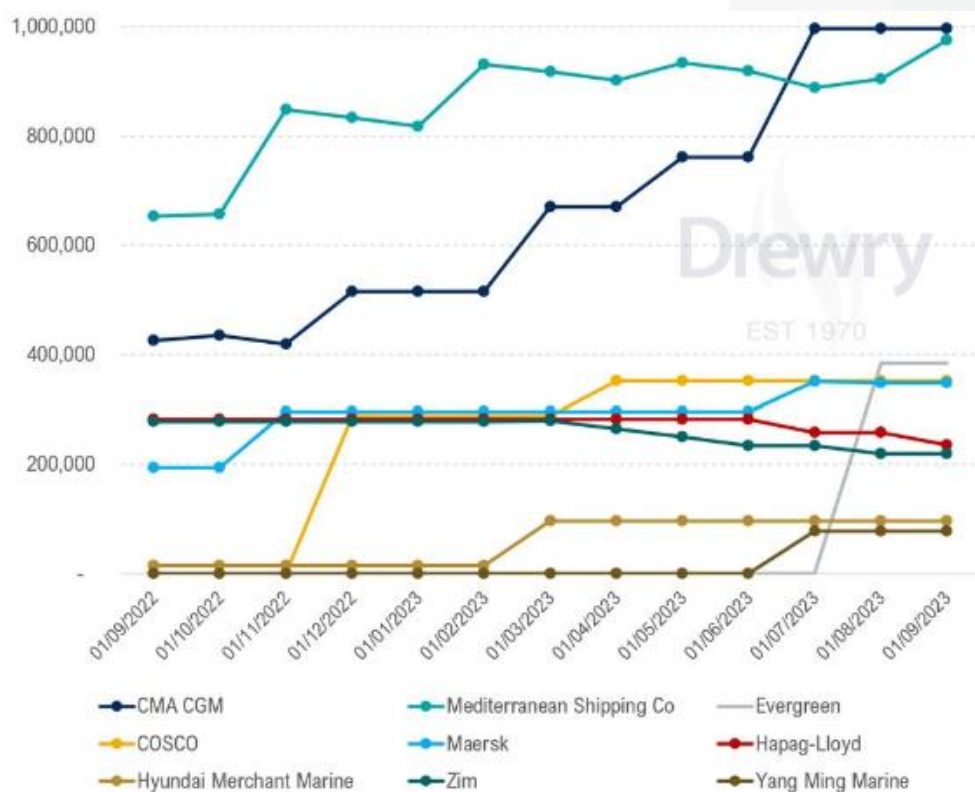
ii. Global container capacity, the increase of "green ships", and ongoing blankings

Vessels calling at European Union ports will soon start paying for carbon emissions, as the maritime industry will join the bloc's Emissions Trading System (ETS) in January, meaning large cargo vessels will start paying for carbon emissions²⁰. Some major lines could see costs run into hundreds of millions of dollars, as the incoming system is the world's first large-scale carbon charge for international shipping. Yet while the additional costs will be significant, the ETS alone isn't likely to force an immediate shift to cleaner marine fuels, which – given the financial war chests of many of the top carriers – has occurred in the last 12 months, as shown by this illustration:

¹⁹ Alphaliner. 15/09/2023. [Top 30 Ports in H1 2023](https://www.alphaliner.com/top-30-ports-in-h1-2023/).

²⁰ Wittels, J. 18/09/2023. [Big Emissions Bills Are Coming for Ships Sailing in Europe](https://www.burda.com/en/big-emissions-bills-are-coming-for-ships-sailing-in-europe).

Figure 16 – Capacity of green containerships on order (TEU)

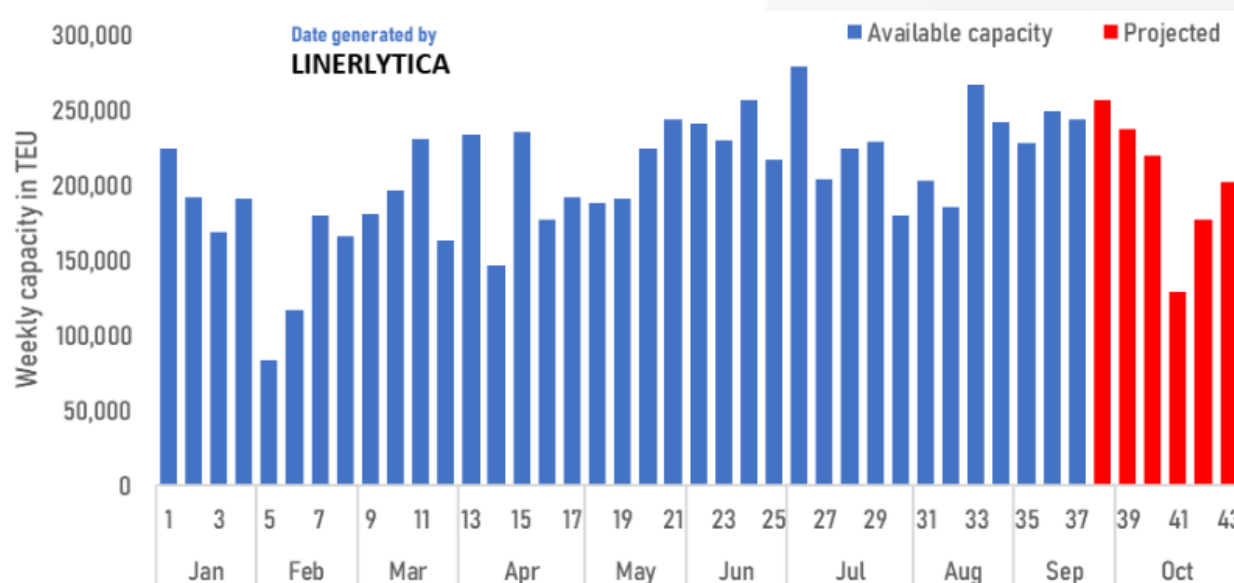


Source: [Drewry & Clarkson Research](#)

At a carbon price of about **€90** a ton, for instance, it would still be cheaper to use polluting oil-based propellants — and pay for emissions — rather than marine biofuels. While commentators expect the EU's new system to increase shipping rates, supply and demand in the vessel market will likely significantly impact these costs. For a single ship carrying **5 000** standard-sized containers between the EU and Asia over a year, the emissions cost could total about **€810 000** in 2024 (assuming a carbon price of €90 a ton). A greater share of emissions will have to be covered in subsequent years, meaning costs for the same ship would rise to **€1,4 million** in 2025 and **€2 million** in 2026, assuming the carbon price went unchanged. The EU also has a separate environmental regulation for shipping lines coming into force in 2025 called *FuelEU Maritime*.

Returning to the short-term capacity questions, the Panama Canal transit restrictions have not stopped carriers from adding **20%** of incremental capacity on the FE-USEC route since the end of August, with the average capacity deployed over the last five weeks reaching **246 000 TEU**, compared to **204 000 TEU** in the preceding five weeks.

Figure 17 – Far East-US East Coast capacity by week 2023



Source: [Linerlytica](https://www.linerlytica.com)

Capacity utilisation has slipped to **85%** in the meantime; however, insufficient capacity remains idled while scrapping of older ships continues at a snail's pace (despite some positive developments from Evergreen this week with two ship sales²¹) at less than **10 000 TEU a month** even as new ship deliveries exceed **200 000 TEU**. Indeed, the number of newbuild ultra-large container vessels (ULCVs) temporarily idled off the Chinese coast is growing. Asia-Europe carriers are forced to halt plans to cascade incumbent ships to other trades²². Fortunately, the changes are boosting the demand for smaller ships in the charter market. All-in-all, the weak demand is seeing freight rates tumble, with recent changes ranging from over **\$3 100 per 40ft** to **\$2 550**, with rates as low as **\$2 100** currently on offer in the Asia-Europe market (see the complete).

Although carriers on the FE-USEC lane have cancelled a reported **40%** of the sailings in week 41 to coincide with vessel departures after the Golden Week holidays, the supply overhang remains a challenge, with carriers unwilling to forego market share. Elsewhere on other trades, *Sea Intelligence* reported that 29 additional blank sailings had been scheduled for the last week on the Transpacific²³ and 18 more on Asia-Europe²⁴. Scheduled capacity reductions on Asia-North America West Coast went from **3,7%** to **14,1%**, from **2,2%** to **16,1%** on Asia-North America East Coast, from **6,8%** to **19,9%** on Asia-North Europe, and from **7,7%** to **21,0%** on Asia-Mediterranean. This reality means carriers are now on track to blank capacity in line with 2019 and the 2017-2019 average. Drewry's "Cancelled Sailings Tracker" remains high and is now trending at a **15% cancellation rate**²⁵ this week. Several carriers nevertheless continue to add capacity despite the prevailing weak market conditions, notably MSC, who again this week added nearly **10 000 TEU second-hand** capacity to their fleet with the purchase of the *Joseph Schulte*, previously stuck in Ukraine since Russia's invasion²⁶.

²¹ Li, M. 18/09/2023. [Evergreen steps up scrapping with two-ship sale as Indian steel prices firm](https://www.evergreen.com/news/evergreen-steps-up-scrapping-with-two-ship-sale-as-indian-steel-prices-firm).

²² Wackett, M. 19/09/2023. [Demand for smaller ships boosts charter market while ULCVs sit at anchor](https://www.seaintelligence.com/news/demand-for-smaller-ships-boosts-charter-market-while-ulcvs-sit-at-anchor).

²³ Wackett, M. 20/09/2023. [THE Alliance suspends transpacific service, but more capacity cuts needed](https://www.seaintelligence.com/news/the-alliance-suspends-transpacific-service-but-more-capacity-cuts-needed).

²⁴ Murphy, A. 13/09/2023. [Sharp Golden Week Capacity Reductions](https://www.seaintelligence.com/news/sharp-golden-week-capacity-reductions).

²⁵ Drewry. 22/09/2023. [Cancelled Sailings Tracker - 22 September](https://www.drewry.com/news/cancelled-sailings-tracker-22-september).

²⁶ Wackett, M. 21/09/2023. [MSC's second-hand ship shopping spree continues despite declining vessel values](https://www.seaintelligence.com/news/msc-s-second-hand-ship-shopping-sprees-continue-despite-declining-vessel-values).

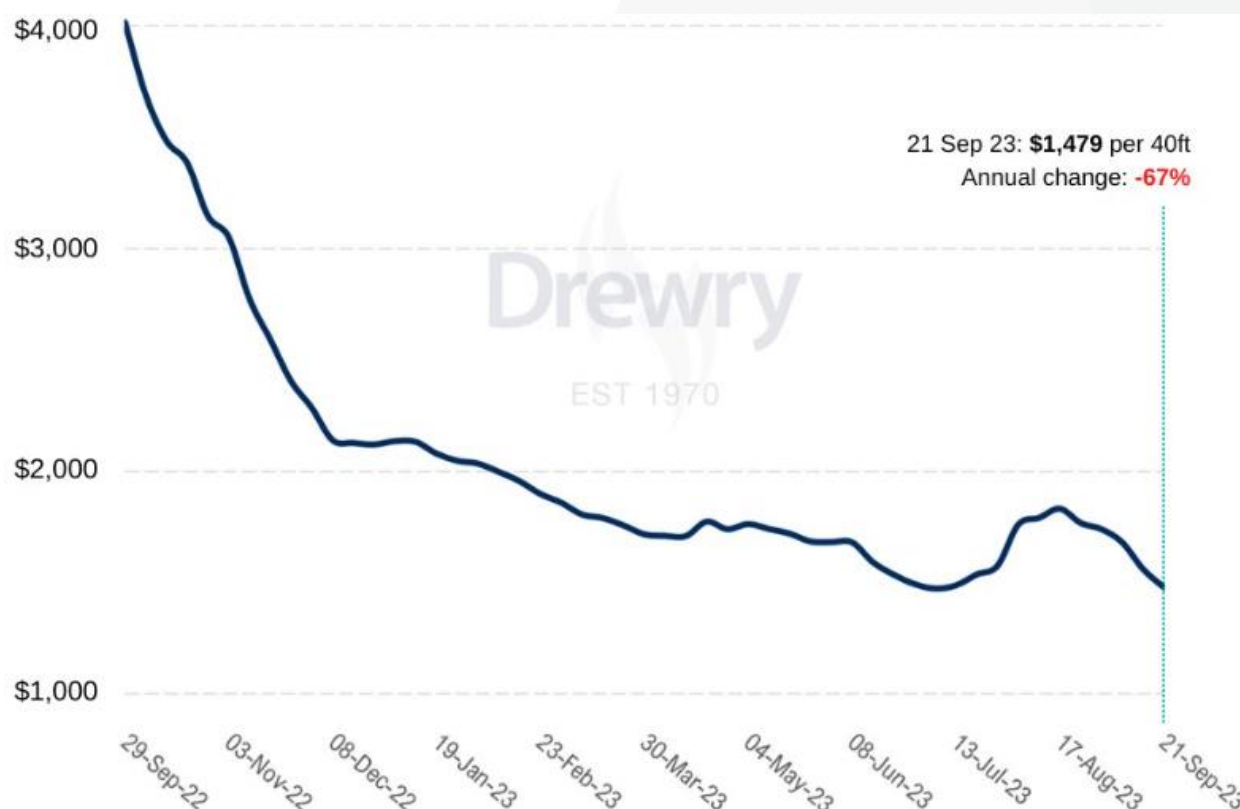
iii. Global container industry summary

Concerning port congestion, the current weak demand and overall reduced supply chain activity continues only to affect **1,59 million TEU** and has now dipped below **5%** since the end of last week²⁷. Indeed, port congestion is expected to continue to fall over the next eight weeks, with container vessel traffic in China slowing down for the Chinese Golden Week holidays starting on 1 October 2023. The fall in congestion in China in October would carry over to the US and Europe, with vessel arrivals to be reduced over the coming two months.

iv. Global container freight rates

The "World Container Index" decreased by **↓5,2%** (or **\$82**) to **\$1 479** per 40-ft container this week²⁸, as freight rates are seemingly in free fall:

Figure 18 – World Container Index assessed by Drewry (last 12 months, \$ per 40 ft. container)



Source: [Compiled from Drewry Ports and Terminal Insights](#)

The composite index is now **↓66,9%** lower than the same week last year and a mere seventh (or **↓85%**) compared to the peak in September 2021 but still slightly (**↑4%**) higher than pre-pandemic average rates in 2019. The year-to-date average is forever getting lower – now at **\$1 756**, significantly lower than the 10-year average of **\$2 687** given the exorbitant rates during the second half of 2021 to the first half of 2022. Regionally, all rates decreased except for New York – Rotterdam. All expectations point to further

²⁷ Linerlytica. 19/09/2023. [Vessels Waiting to Berth Dip Below 5% of Total Fleet.](#)

²⁸ Drewry. 14/09/2023. [World Container Index – 14 September 2023.](#)

moderation in the coming weeks, as carriers are undoubtedly constrained to accept lower and lower rates or simply go with blankings.

v. Further developments of note

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

1. Carriers hit by rising fuel costs as OPEC cuts supply:

- a. Falling global freight rates are causing significant challenges for container shipping lines as they face a substantial increase in fuel costs²⁹. Rotterdam-sourced low-sulphur fuel (VLSFO) prices rose by **\$8 per ton**, marking a **↑22%** increase since the end of June. While carriers theoretically have mechanisms to adjust bunker surcharge amounts payable by shippers, some have not increased charges despite rising fuel costs.
- b. The surge in oil prices, driven by OPEC supply cuts, is expected to continue, resulting in higher bunker prices. This situation poses a challenge for carriers trying to control costs amid falling revenues. Additionally, the shrinking price gap between heavy fuel oil (HFO) and VLSFO reduces the incentive to use scrubbers for emissions control.
- c. Carriers are also preparing to comply with the EU's Emissions Trading System (ETS) regulations, which will require them to monitor and report emissions and pay a contribution for CO2 emissions from their vessels within the European Economic Area (EEA) starting in January 2024. Compliance costs are expected to be significant and will increase over time.

2. Maersk insists CMA CGM deal will not influence their green strategy:

- a. Maersk, despite its previous anti-LNG stance, is entering a cooperation with CMA CGM to establish a framework for mass production of green methane and green methanol, focusing on green fuels as part of the decarbonisation effort³⁰.
- b. Maersk clarified that this partnership doesn't indicate a change in its strategy regarding LNG. The company maintains that LNG is not a fuel of the future for its fleet and will continue to invest in technologies and innovations for green alternatives to fossil fuels.
- c. CMA CGM's CEO, Rodolphe Saadé, views this partnership as a significant step toward decarbonising the shipping industry and anticipates the involvement of other companies to accelerate the development of sustainable solutions.

b. Global air cargo industry




















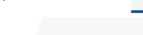
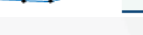
In the weekly data from World ACD, global air cargo tonnages showed a positive development in the second full week of September, after stabilising at the beginning of the month, with average rates also on an upward trend, breaking out of the bandwidth since mid-July – between **\$2,26** and **\$2,29 per kg**, now reaching **\$2,31**.

²⁹ Wackett, M. 18/09/2023. [Box lines hit by rising fuel costs as OPEC cuts supply](#).

³⁰ Bartlett, C. 19/09/2023. [Maersk insists CMA CGM deal is not a change in green strategy](#).

Figure 19 – Global capacity, weight, and yield over the last five weeks (% , weekly)

Origin Regions
last 2 to 5 weeks

	Capacity ¹			Chargeable weight ¹			Yield/rate ¹		
	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY	Last 5 wks	2Wo2W	YoY
Africa		-0%	+5%		+3%	-1%		+0%	-10%
Asia Pacific		+4%	+30%		+7%	+10%		+3%	-40%
C. & S. America		-2%	-3%		-1%	+2%		+1%	-15%
Europe		-0%	+16%		+4%	-12%		+0%	-33%
M. East & S. Asia		-0%	+11%		-5%	-4%		+1%	-37%
North America		+0%	+9%		-3%	-13%		-0%	-28%
Worldwide		+1%	+13%		+3%	-2%		+2%	-33%

Source: [World ACD](#)

Week 37 (11 to 17 September) saw a **↑4%** increase in tonnages compared to the previous week, with a **↑1%** rise in average worldwide air cargo prices. When comparing weeks 36 and 37 with the preceding two weeks (2w/2w), global tonnages increased by **↑3%** compared to the combined total in weeks 34 and 35. Worldwide rates increased by **↑2%**, with capacity slightly higher by **↑1%**.

Regionally, notable tonnage increases (2w/2w) were observed in intra-Asia Pacific (**↑11%**) and from Asia Pacific to North America (**↑6%**) and Europe (**↑6%**). Price-wise, average global rates increased by **↑2%** on a 2w/2w basis, with significant rises observed from Asia Pacific to Europe (**↑6%**) and North America (**↑4%**).

Comparing the current global market to the same period last year, chargeable weight in weeks 36 and 37 was down **↓2%**, with a notable **↑10%** increase from Asia Pacific. However, tonnages decreased by **↓13%** in North America and **↓12%** in Europe. Overall capacity increased by **↑13%** compared to last year, with Asia Pacific showing a remarkable **↑30%** rise in capacity. Other regions with significant annual capacity increases included Europe (**↑16%**), the Middle East and South Asia (**↑11%**), North America (**↑9%**), and Africa (**↑5%**).

ENDS³¹

³¹ACKNOWLEDGEMENT:

*This initiative – **The Cargo Movement Update** – was developed collectively by Business at large to provide visibility of the movement of goods during the COVID-19 pandemic. The report is authored by the South 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. This edition is proudly sponsored by [AIMS Global Logistics \(AGL\)](#).*