



BCMM Investment Conference

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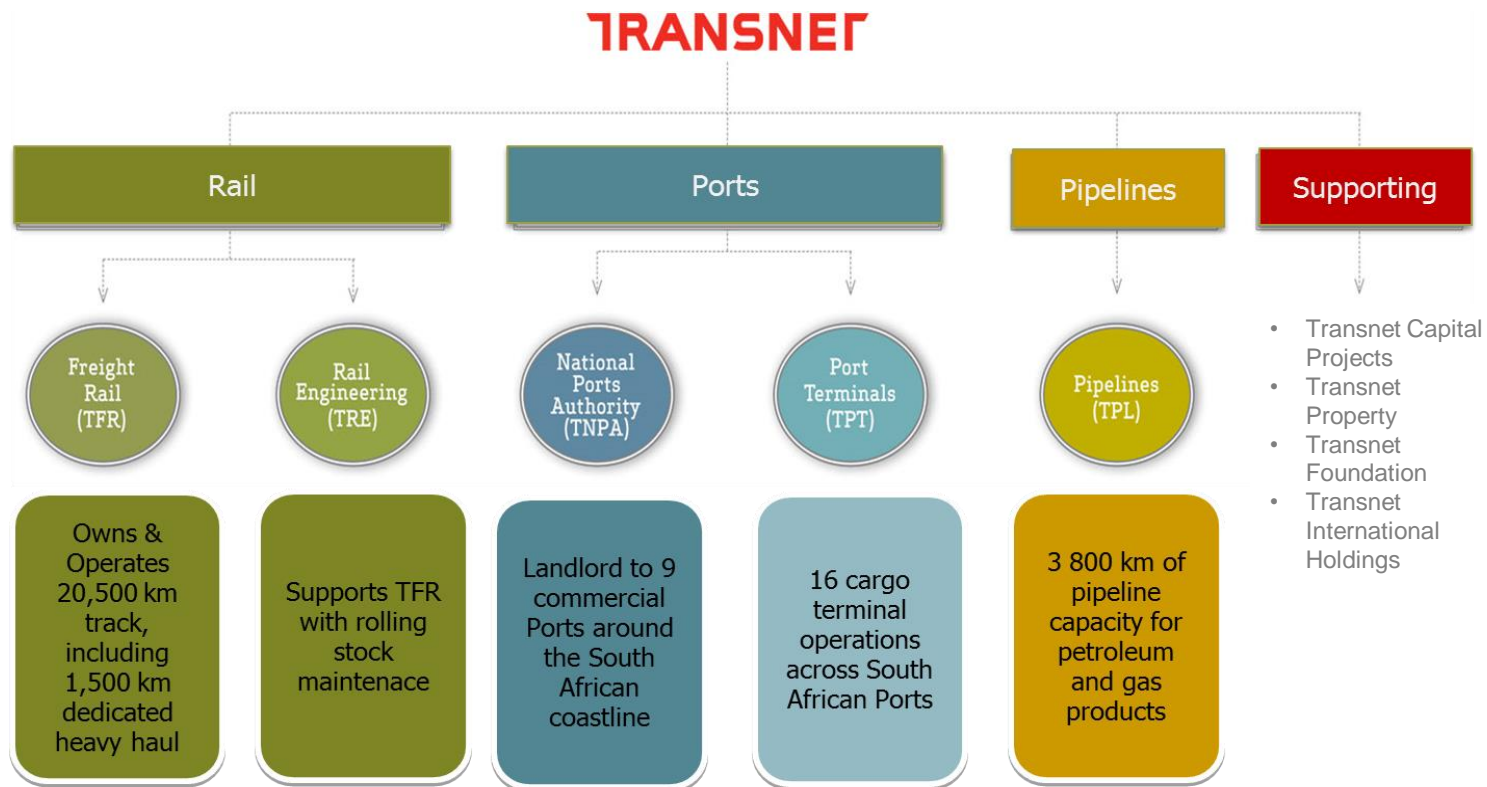
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INTRODUCTION: TRANSNET STRUCTURE





PORT SYSTEM SNAPSHOT



TNPA BUSINESS OVERVIEW SUMMARY

Four Core Business Activities



Infrastructure



Marine Services



Dredging



Lighthouses

The National Ports Authority is a landlord Port Authority that provides port infrastructure and maritime-related services at the South African ports. Key business parameters :

- ✚ 9 operational ports – coastline approx 2 800km
- ✚ 106 berths (20 container, 26 dry bulk, 38 break-bulk, 16 liquid bulk, 6 automotive)
- ✚ 57 maritime craft (30 tugs, 9 pilot boats, 7 workboats, 3 pilot helicopters, 5 dredgers, 4 survey boats)
- ✚ 4 178 permanent employees countrywide

Eight Operational Ports



Core Business & Key Commodities

Core Business:

- Infrastructure – Capacity planning, Development, Maintenance
- Marine Services – Pilotage, Tug and Berthing Services
- Dredging – Maintenance dredging and Hydro graphic surveys
- Lighthouse Services – Provision of Aids to Navigation

Ports – key commodities:

- Durban – Containers, Autos and Liquid bulk
- Richards Bay – Coal
- Saldanha – Iron Ore
- Port Elizabeth – Containers and Autos
- Cape Town – Containers and Fruit
- East London – Autos and Liquid Bulk
- Ngqura – Containers
- Mossel Bay – Liquid bulk



SOUTH AFRICAN COMMERCIAL PORTS

WESTERN PORTS



Saldanha Bay



Cape Town



Mossel Bay

CENTRAL PORTS



Port Elizabeth



Ngqura



East London

EASTERN PORTS



Durban



Richards Bay

CORE FUNCTIONS OF PORTS

(National Ports Act, Act 12 of 2005 - Section 11)

LANDLORD

Promote the **use, improvement and development of ports**, and control land use within the ports, having the power to lease port land under conditions it determines.

MASTER PLANNER

Plan improve, develop and maintain **port infrastructure**.

CONTROLLER OF PORTS
NAVIGATION

Make and apply rules to control navigation within port limits and approaches, ensure **protection of the environment** and ensure **safety and security** within port limits.

CONTROLLER OF PORTS
SERVICES & FACILITIES

Ensure that **port services and facilities are provided**, and may enter into agreements or **licence** other parties to provide these.

MARKETER &
ADMINISTRATOR

Ensure that **adequate, affordable, equitable and efficient** port services and facilities are provided for port users.

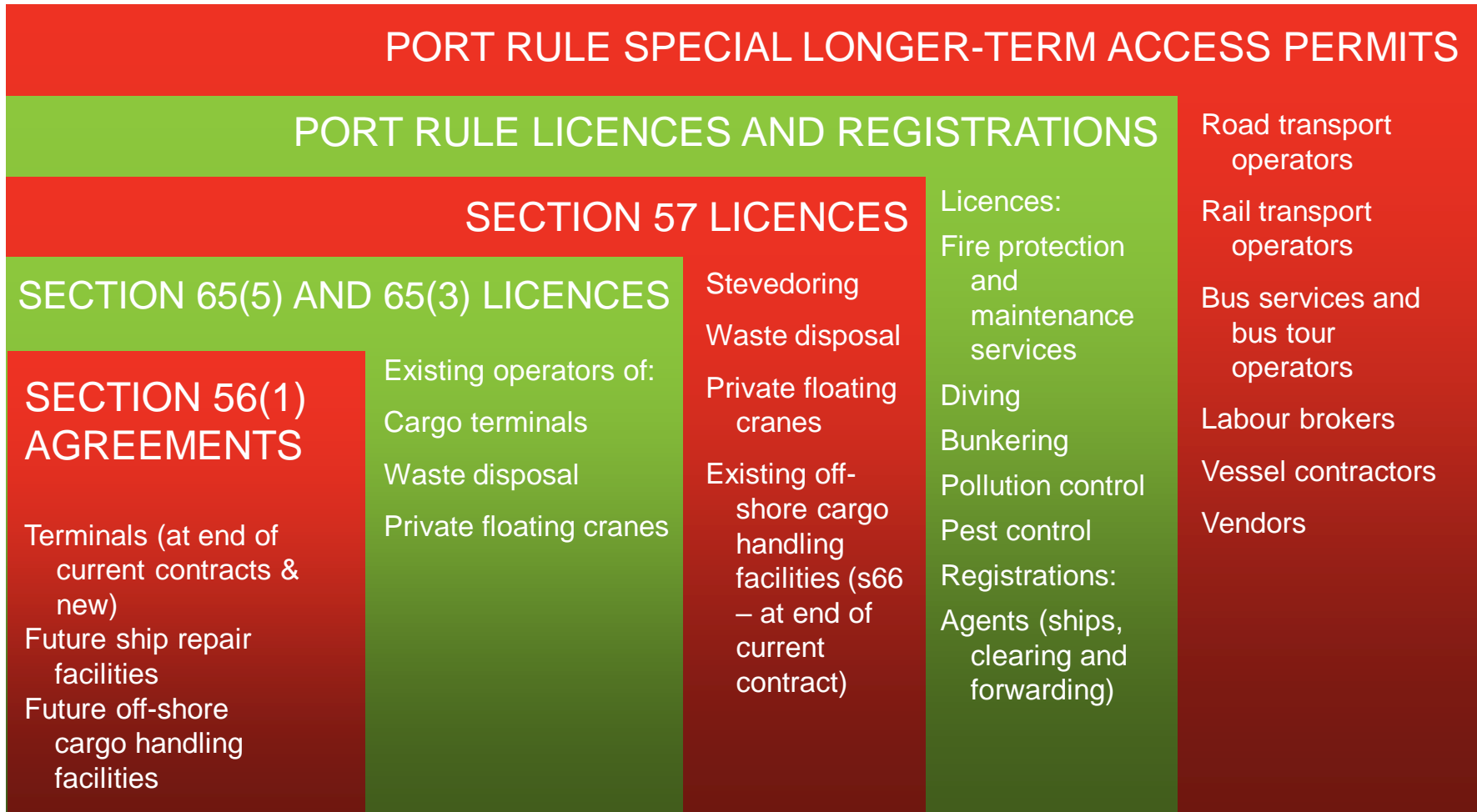
CHANGE AGENT

Ensure **non-discriminatory, fair, transparent access to port services and facilities**; advancement of previously disadvantaged people; promotion of representivity and participation in terminal operations; enhanced transparency in port management.

COORDINATOR WITH OTHER
STATE AGENCIES

Advise on all matters relating to the port sector, and **liaise with all stakeholders**.

AGREEMENTS, LICENCES, REGISTRATIONS AND PERMIT REGIME: Overview



High ← Degree of Regulation → Low



PORT OF EAST LONDON – OVERVIEW

Terminals

7 Licenced Terminal Operators



Multi Purpose
Terminal

Autos

Fuels

Grains

Port and Berth Layout



Key Commodities

The National Ports Authority is a landlord Port Authority that provides port infrastructure and maritime-related services at the Port of East London. Key business parameters :

- ✚ R 3.3Bn Total assets
- ✚ 1.3 million square metres land area
- ✚ 4 Terminal Types – 7 Terminal Operators
- ✚ 11 Commercial berths
- ✚ Ship repair facilities
- ✚ 3 maritime craft (2 tugs, 1 workboat)
- ✚ 159 employees

Key Commodities

Key Port Commodities:

• Inbound

- Automotive Components (Containers)
- Vehicles (Ro-Ro)
- Fuel (Liquid Bulk)
- Grains (Dry Bulk - wheat, maize)

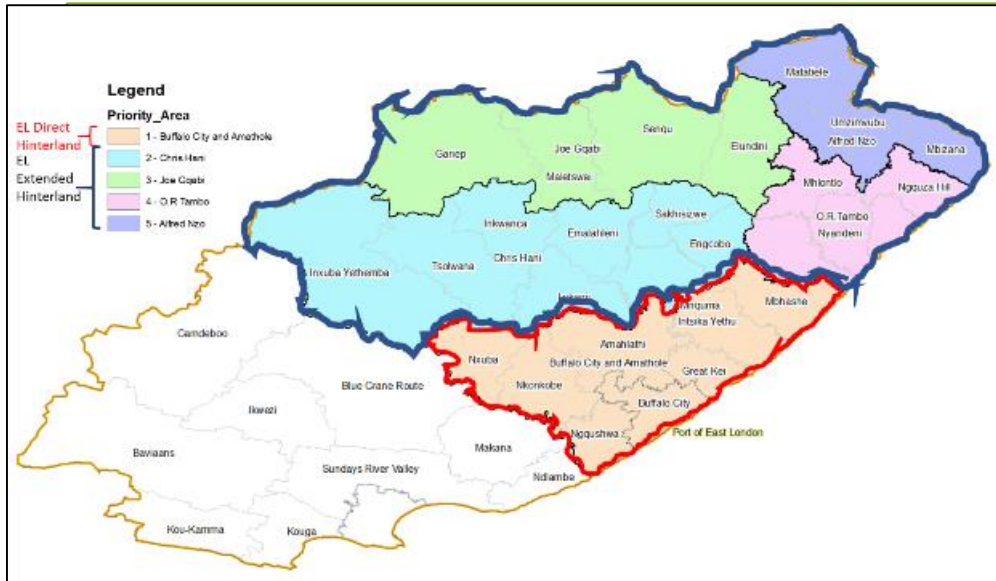
• Outbound

- Vehicles (Ro-Ro)
- Automotive Components (Containers)
- Processed foodstuffs (Containers)
- Livestock (Breakbulk)



CAPITAL INVESTMENT AND GROWTH OPPORTUNITIES

SIR PROGRAM ENABLER FOR REALISING GROWTH IN THE REGION – TRANSNET OPERATING DIVISIONS & MULTIPLE STAKEHOLDERS



The **Strategic Investment Roadmap (SIR)** of the Eastern region of the Eastern Cape Province aims to catalyse and revive economic development and social emancipation of the communities across the Region

Mandate

- Assist in lowering the cost of doing business in South Africa, enabling economic growth and ensuring security of supply through providing appropriate (port, rail and pipeline) infrastructure in a cost-effective and efficient manner
- Strategic objectives are aligned with national plans and the SSI

STRATEGIC INVESTMENT ROADMAP OBJECTIVES

Provide integrated socio-economic & multi-disciplinary solutions

Elevate Provincial Economic Status in par with RSA

Framework for fostering intergovernmental and private sector collaboration

Roadmap for luring Local and Foreign Direct Investment into the Region.

Identify new and anchor industries necessary to strengthen the Regional supply chain

Reduce pervasive levels of poverty and unemployment



Enabling production and trade

Catalyst for economic growth

Driving exports & ensuring rural access to markets

Creation of strategic transport infrastructure

Regional & global connectivity & integration

Job creation and skills development

Development of world class port & rail technologies

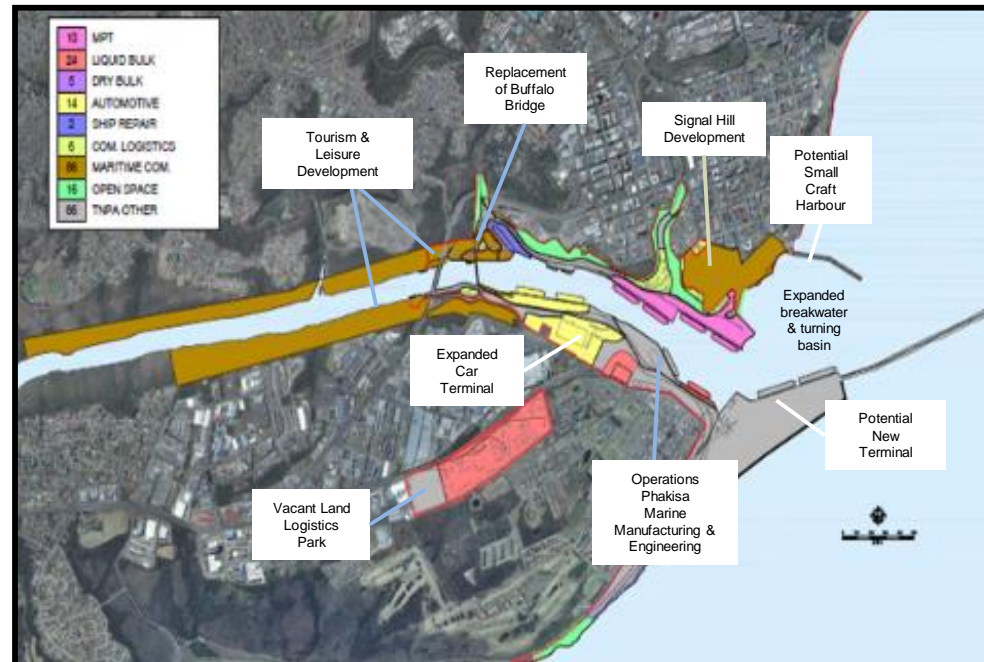


CAPITAL INVESTMENT & OTHER GROWTH OPPORTUNITIES

Existing Layout



Medium to Long Term Layout



Strategic Port Projects

- Port Expansion Project
- Replacement of Buffalo Bridge
- Tourism and Leisure Development - Latimers Landing Jetty Replacement
- Operations Phakisa*
- Reconstruction of Quay 3 (F, G and I berths)

*Current Projects

PORT INFRASTRUCTURE EXPANSION





TOURISM & LEISURE



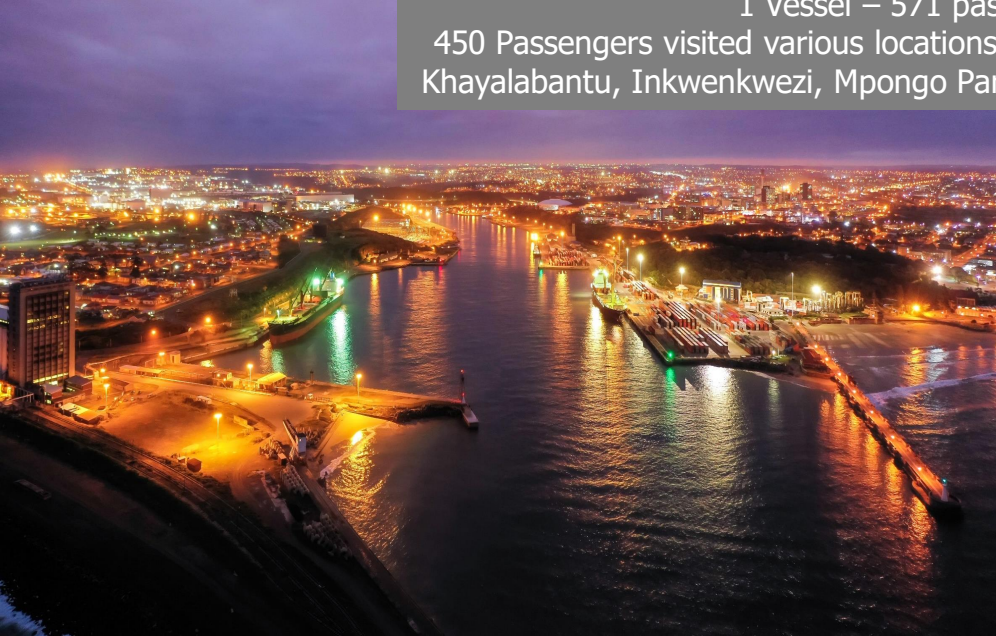
CRUISE TOURISM...WELCOME TO BUFFALO CITY



Example of Cruise Tourism Job Creation

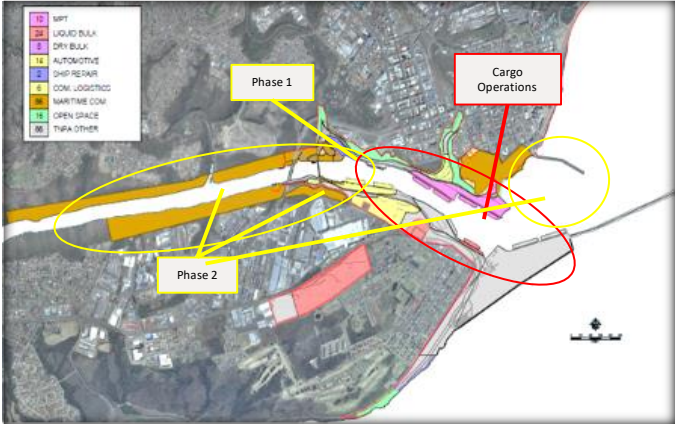
1 Vessel – 571 passengers / 343 crew

450 Passengers visited various locations, eg. 10 x luxury buses with tour guides
Khayalabantu, Inkwenkwezi, Mpongo Park, quayside entertainment, craft markets





TOURISM & LEISURE DEVELOPMENT



Latimers Landing City-Port Collaboration
Improved access of a working port to the community aligning Port-City beachfront development initiative and port tourism development

Phase 1 – Replacement of the Jetty

Phase 2 – Developmental lease for Leisure and Tourism Precinct

Artist impression –
 based on Stakeholder
 Consultations



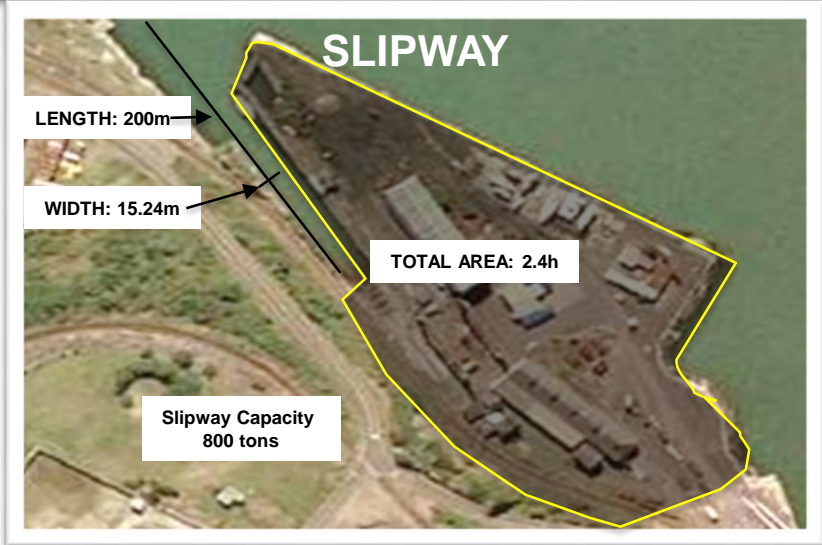
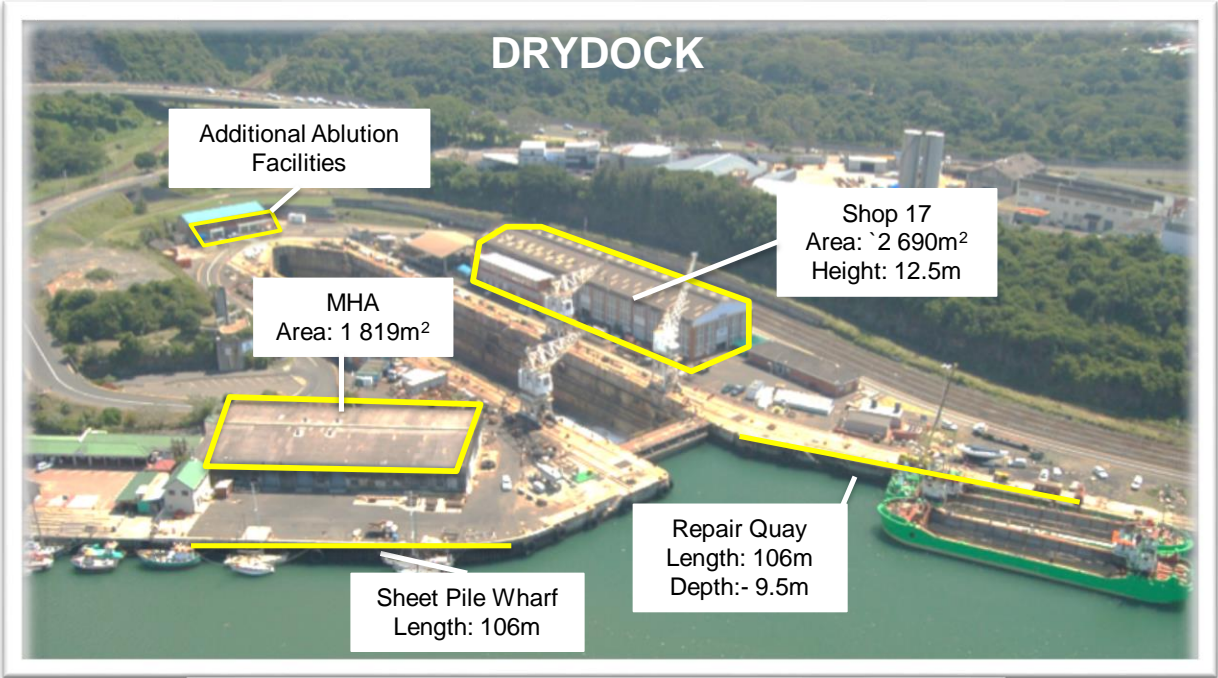


SHIP REPAIR – DRYDOCK & SLIPWAY





SHIP REPAIR – DRYDOCK & SLIPWAY





SHIP REPAIR – ECONOMIC BENEFITS



Example: DRYDOCK CAISSON GATE PROJECT

- Employment Created – 82 direct jobs
- Indirect:- hospitality industry, suppliers, etc.



Example: SA AGULHAS

- Employment Created – over 80 direct jobs
- Indirect:- hospitality industry, suppliers, etc.





Thank you

