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NATIONAL PORT PLANS 2015

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PORT OF RICHARDS BAY – ROLE OF THE PORT

Port of Richards Bay is South Africa's premier bulk port, with its main hinterlands comprising northern KwaZulu-Natal, Gauteng and Mpumalanga. The port is the largest in South Africa by tonnage, handling about 89 million tonnes of cargo per year (by means of over 1800 commercial vessel calls), equating to about 40% of South Africa's total port demand. The 30 year forecast predicts over 170 million tonnes of cargo per year. Major growth areas for the port are seen to be dry bulk, liquid bulk and break bulk cargo handling.

Bulk operations in the port currently focus on four major activities: export coal, dry bulk, break bulk and liquid bulk. Other services include bunkering and minor ship repairs and facilities for service and recreational craft. In addition to providing bulk facilities for the hinterland, the port plays an important role in the local economy of the City of uMhlatuze, with its growing industrial base.

The primary challenge for the port is to accommodate growing demand for handling bulk cargoes. This is to be achieved by means of the Port Capacity Expansion Project in the Bayvue precinct. A potential future development will be a dedicated ship repair facility, and a gas (LNG) import facility to supply gas for the conversion to power. Allowance will also be needed for additional liquid bulk freight.

The complementary regional grouping of the Ports of Durban, the new Dig-out Port and Richards Bay allows the rational and complementary allocation of cargo between the three ports. In Richards Bay the focus will be on coal export and other dry bulk handling, while in Durban the focus will be on container, automotive and liquid bulk handling. This division of cargo is likely to apply in the medium term. However, it is possible that some bulk products may run out (e.g. coal reserves in South Africa appear to be limited) and diversification may be required in the long term.





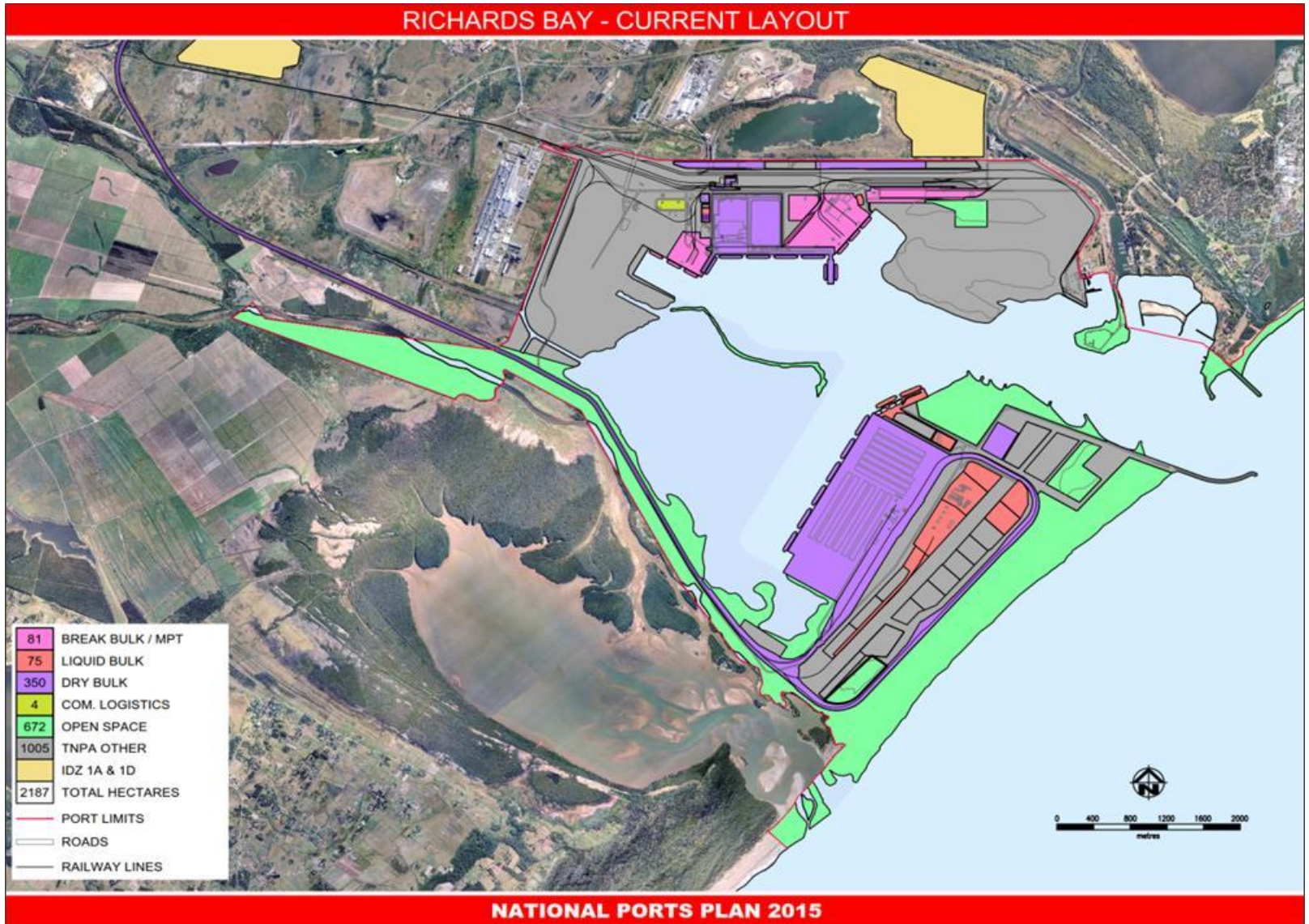
PORT OF RICHARDS BAY – AERIAL VIEW





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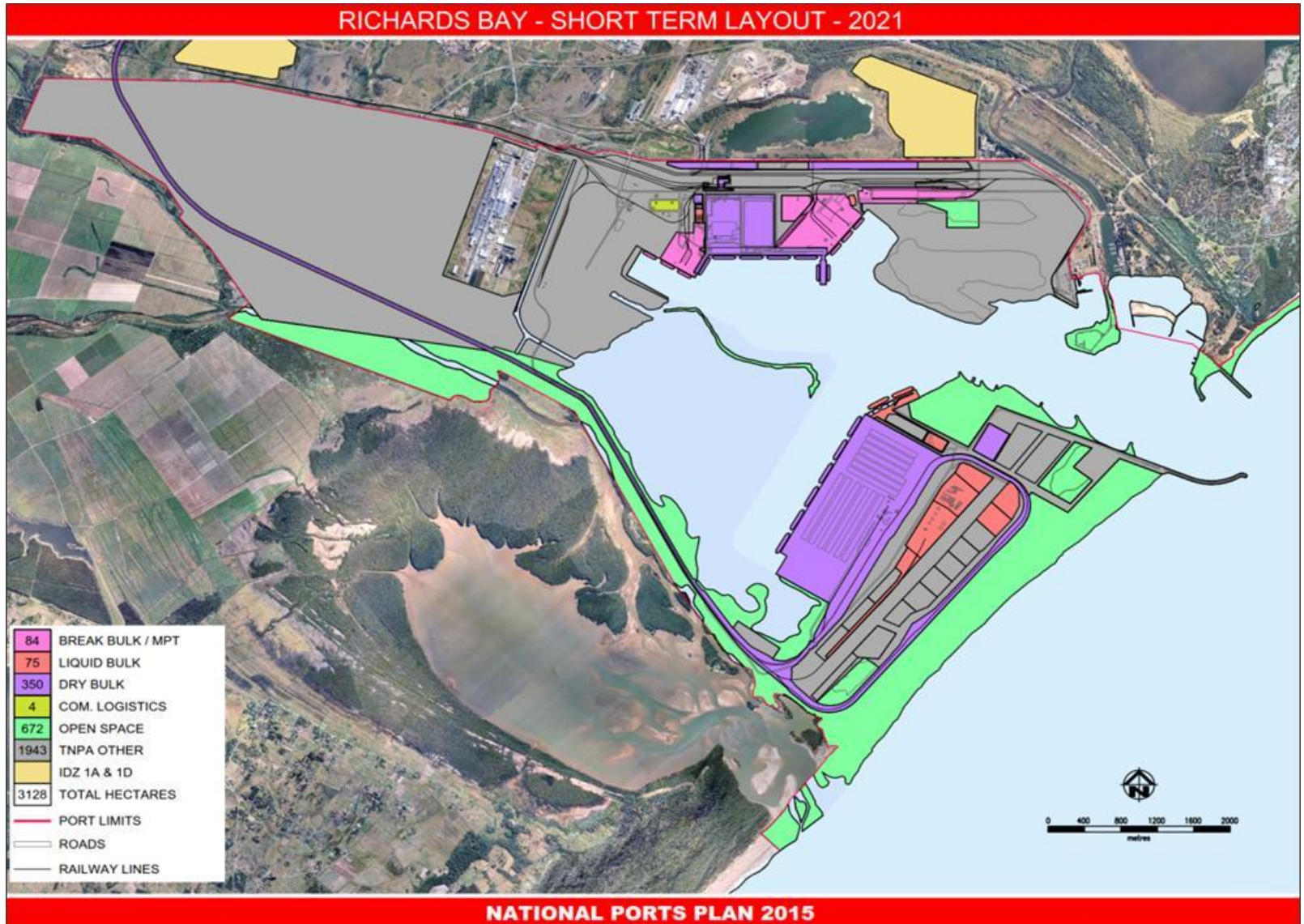
PORT OF RICHARDS BAY – CURRENT LAYOUT





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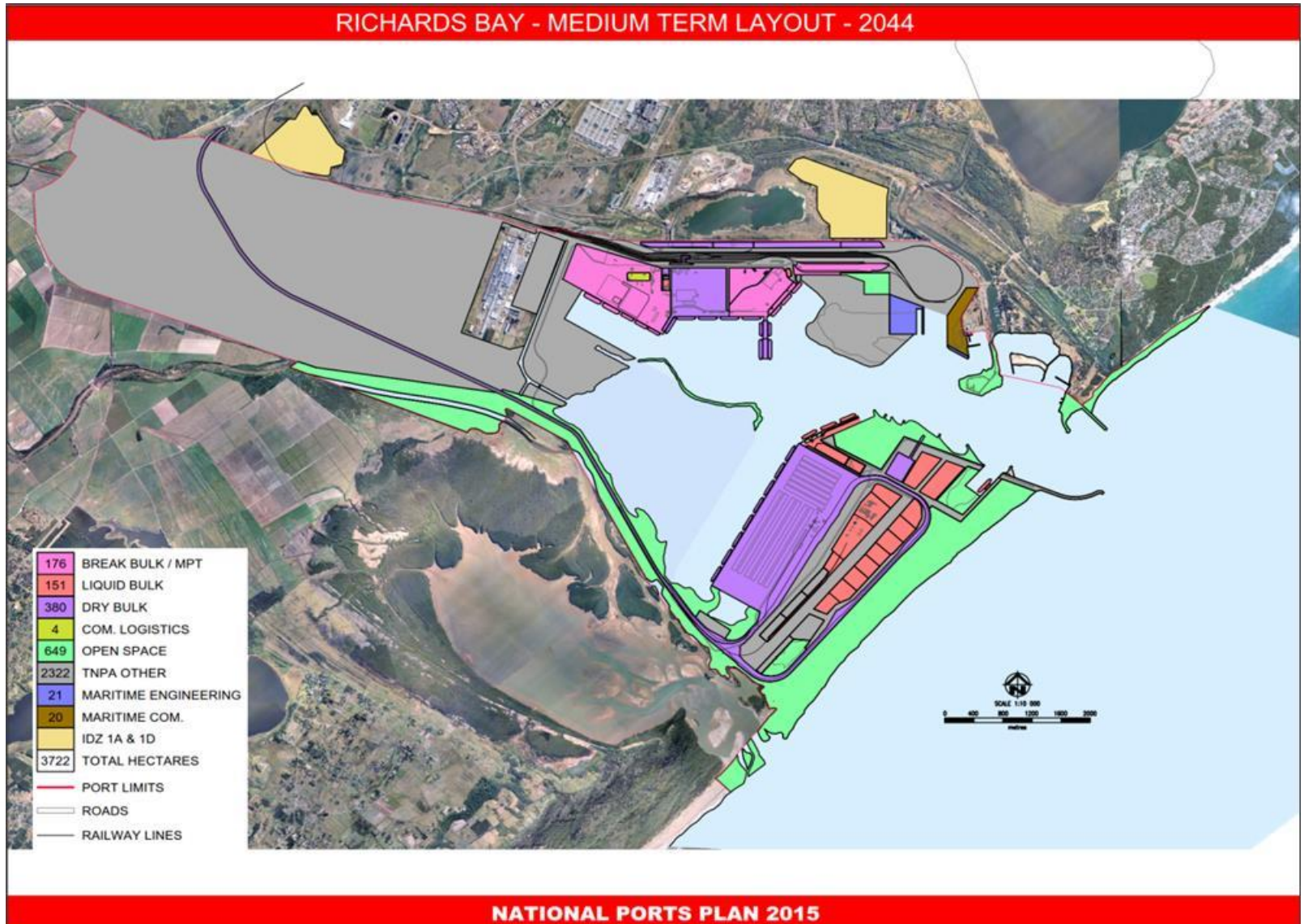
PORT OF RICHARDS BAY – SHORT TERM LAYOUT



PORT OF RICHARDS BAY – MEDIUM TERM LAYOUT



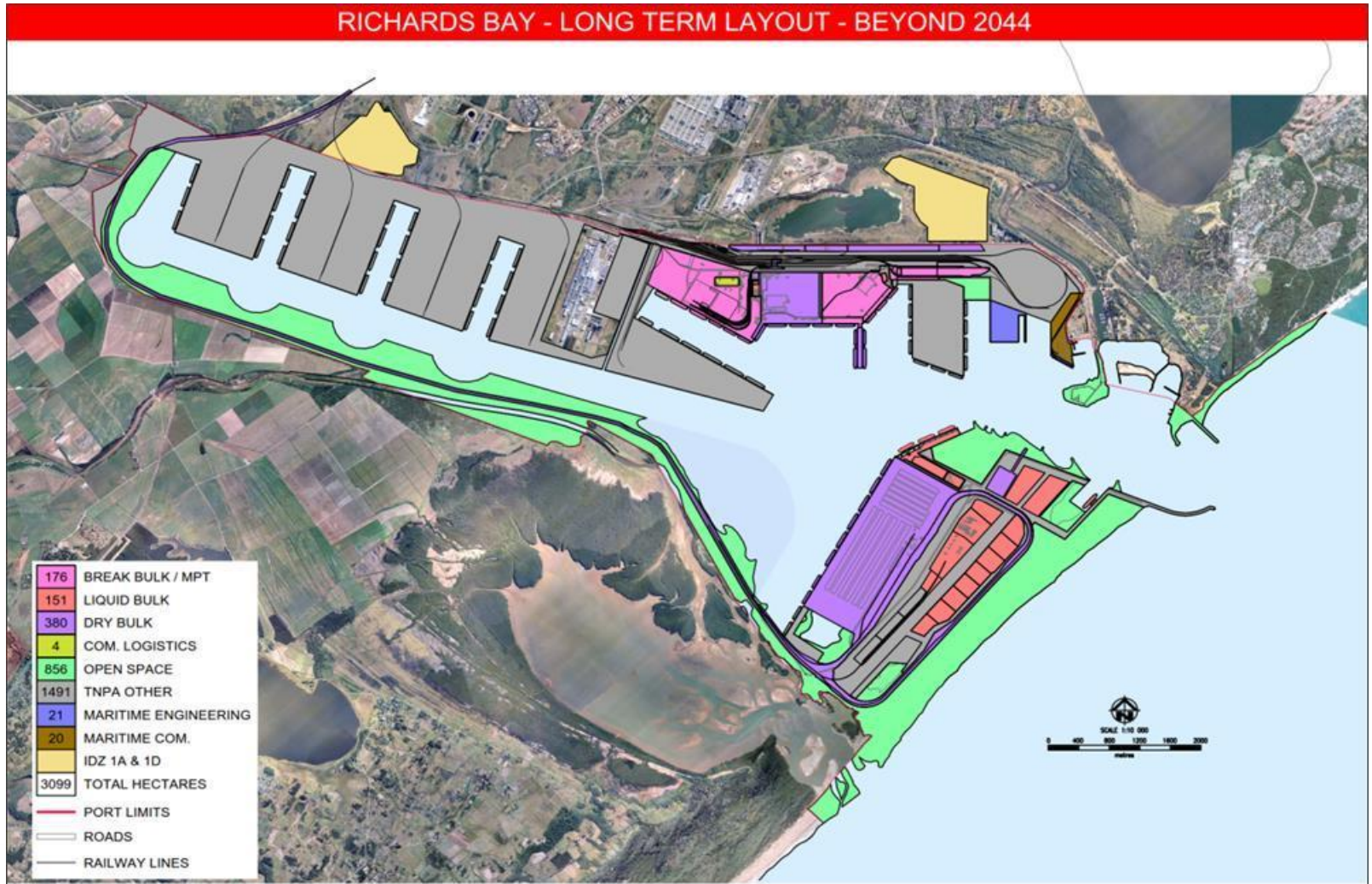
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PORT OF RICHARDS BAY – LONG TERM LAYOUT

RICHARDS BAY - LONG TERM LAYOUT - BEYOND 2044





PORT OF DURAN – ROLE OF THE PORT

Port of Durban is South Africa's premier container port (59% of South Africa's container traffic) and the principle port serving the KwaZulu-Natal province and the Gauteng region as well as the Southern African hinterland. The port handles approximately 3900 commercial vessels annually, the highest number in South Africa, equating to over 87 million tonnes of cargo per year. The 30 year forecast predicts around 175 million tonnes of cargo per year. Major growth areas for the port are seen to be in containers and bulk liquid handling, with moderate growth in automotive cargo.

Although the Port of Durban is a mature port with increasingly congested operations, there is potential to improve throughput capacity by reconfiguring and rationalising the existing precincts of DCT, Point, Maydon Wharf and Island View. The development of the dig-out port at the old airport site is key to the provision of medium and long term capacity.

Major expansion projects in the short term include deepening and lengthening of the North Quay and infill at Pier 1 of DCT, berth reconstruction and deepening at Island View and Maydon Wharf, and development of a new dedicated passenger terminal.

The complementary regional grouping of Durban (with the current port complemented by the proposed Dig-out port) and Richards Bay allows the rational and complementary allocation of cargo between the three ports. Port of Richards Bay can focus on coal export and other dry bulk handling, while the two ports in Durban can focus on container, automotive and liquid bulk handling.

Port of Durban will continue to provide a wide range of port infrastructure and operational services. With its well established logistics infrastructure and supporting local industrial base, it will continue to be the port of choice for high-value Gauteng and other inland cargoes.





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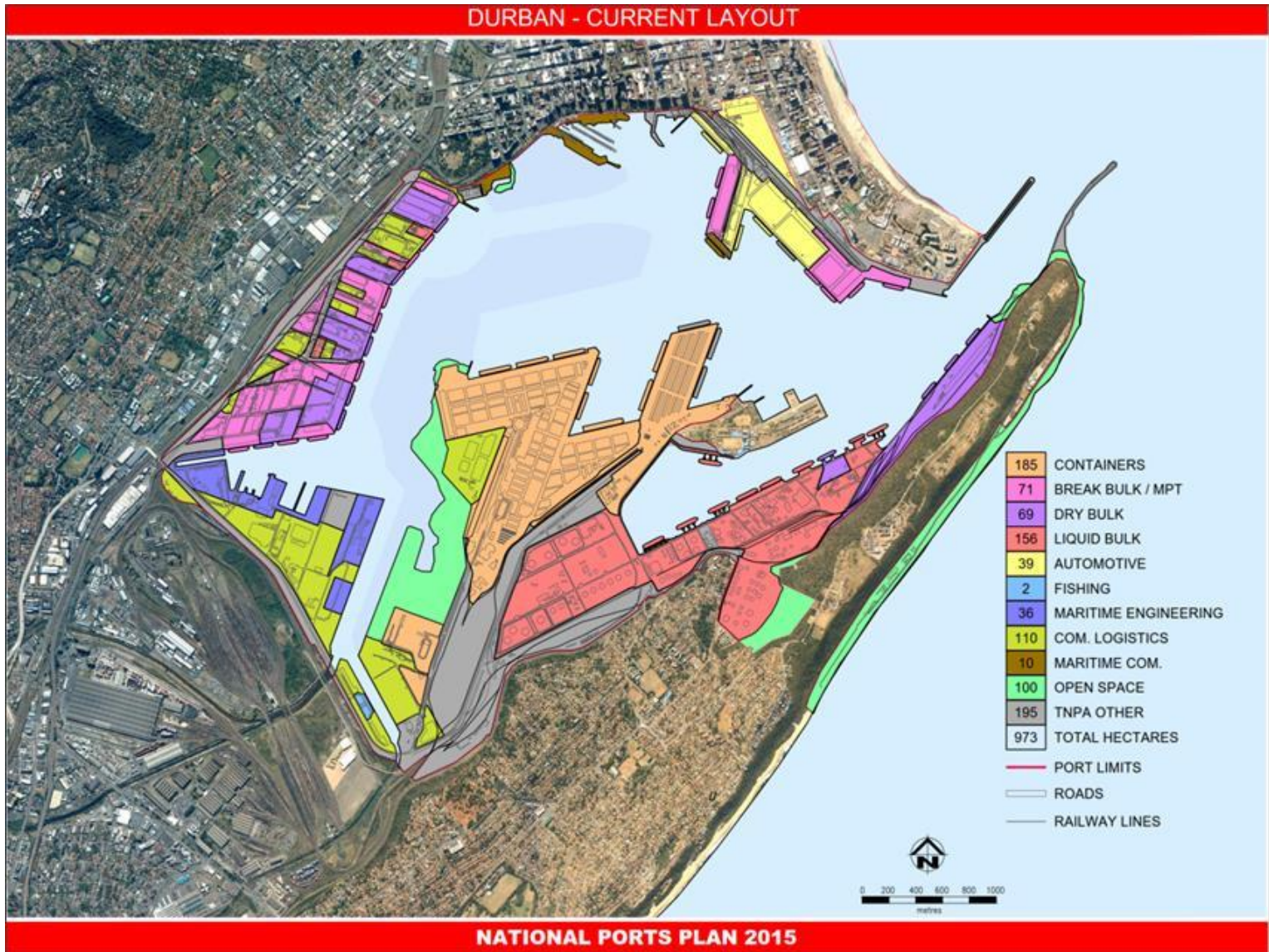
PORT OF DURAN – AERIAL VIEW





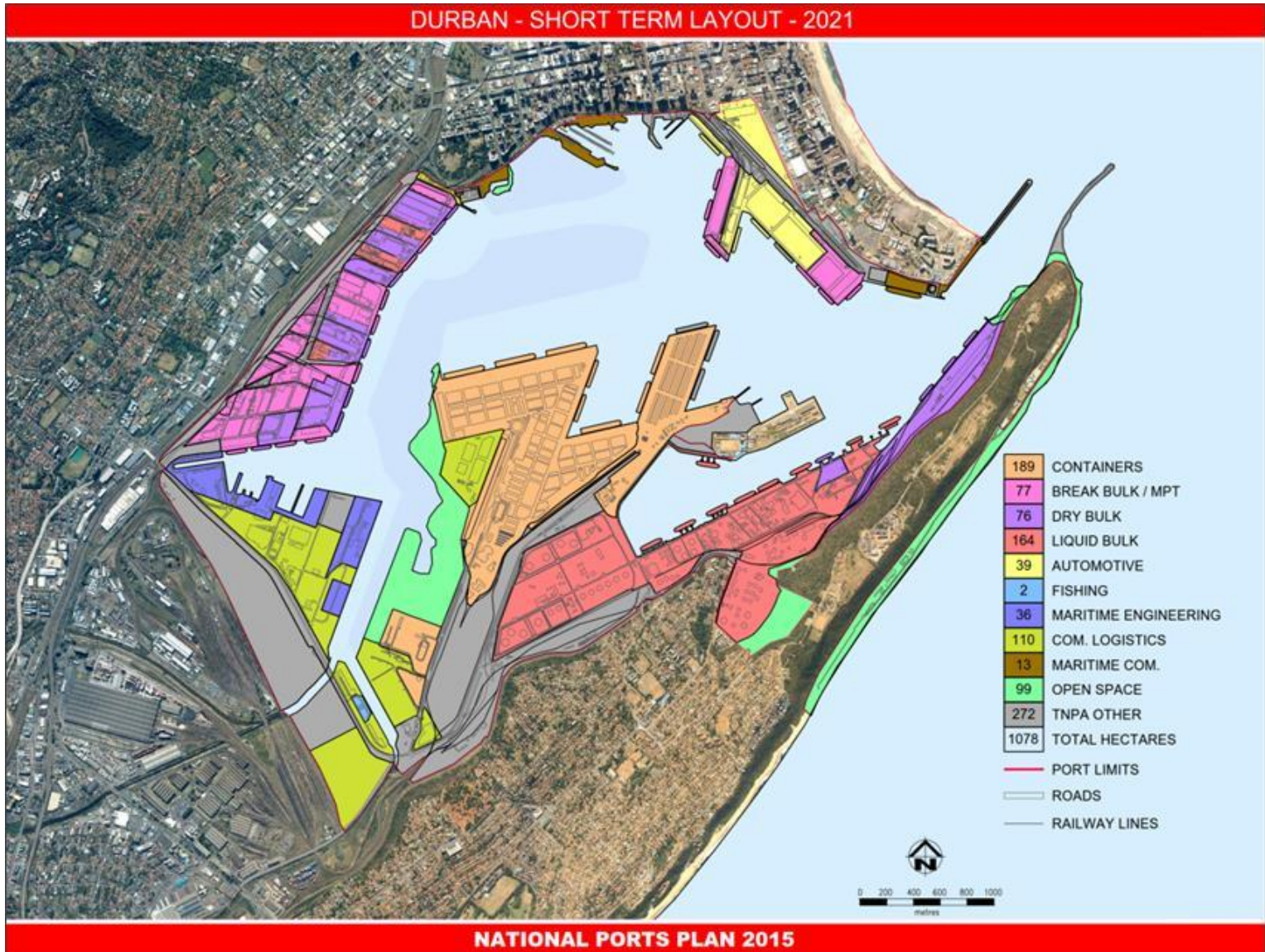
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PORT OF DURBAN – CURRENT LAYOUT





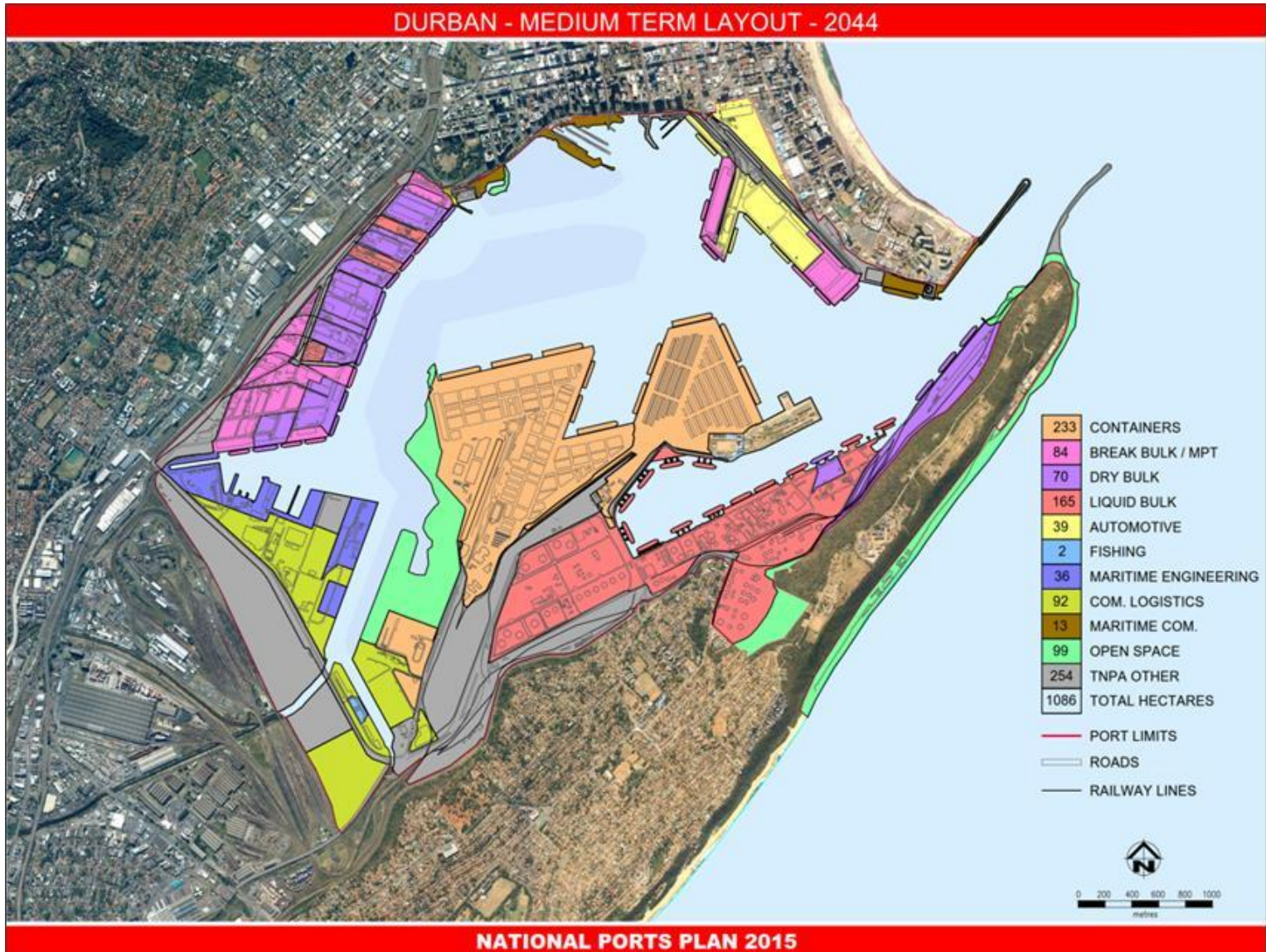
PORT OF DURBAN – SHORT TERM LAYOUT





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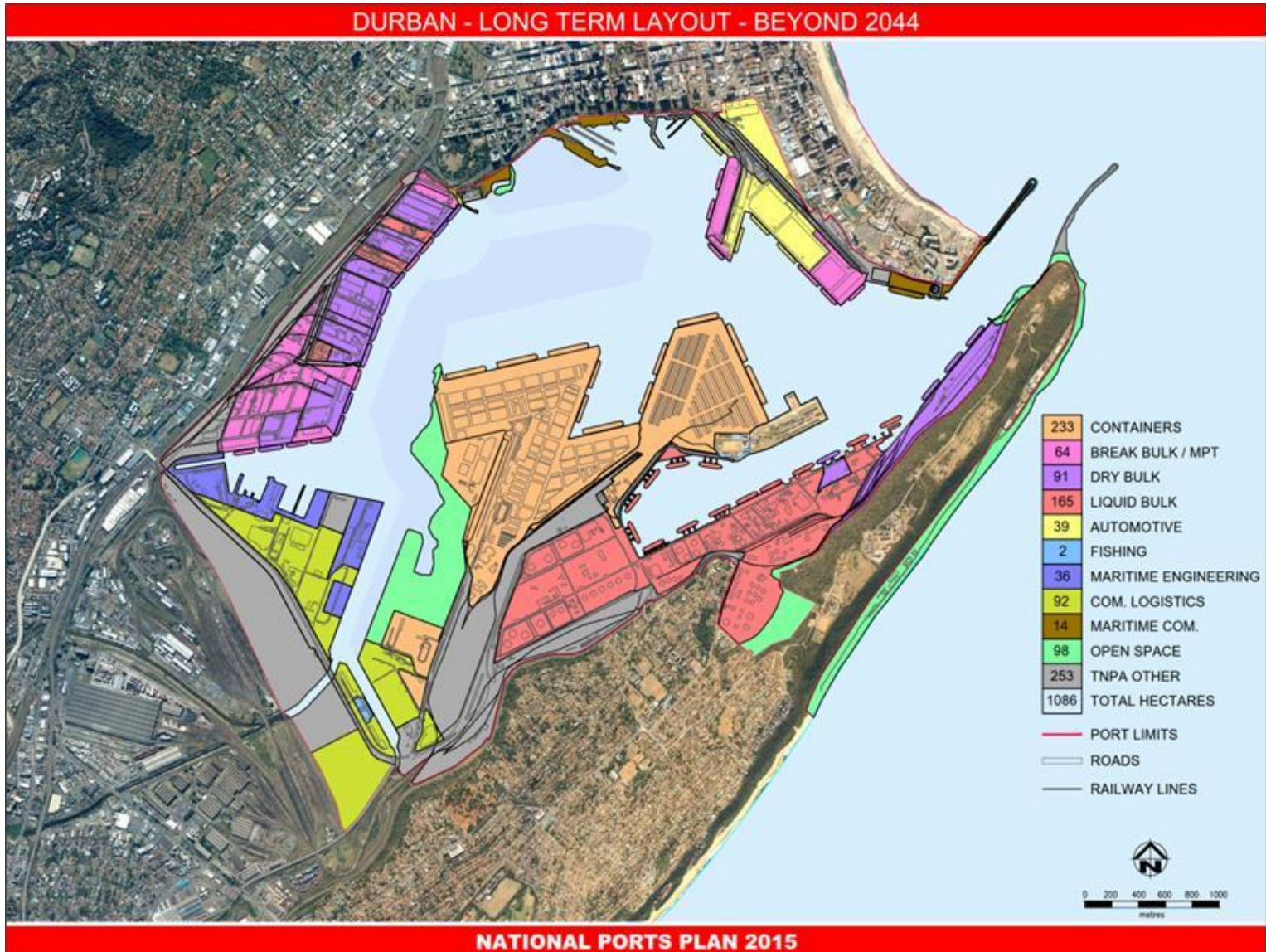
PORT OF DURBAN – MEDIUM TERM LAYOUT





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PORT OF DURBAN – LONG TERM LAYOUT





PORT OF EAST LONDON – ROLE OF THE PORT

Port of East London is an established port serving the Eastern Cape hinterland, handling primarily industrial and agricultural cargoes, with a particular focus on servicing the local automotive industry. The port annually handles over 50 000 TEUs, together with some 75 000 vehicles and about 1.5 million tons of other cargo (total about 2.2 million tons of cargo). The 30-year forecast predicts around 5 million tonnes of cargo per year.

The port is sited at the mouth of the Buffalo River which has steep rocky riverbanks and as a consequence is restricted in both width and depth. There are therefore beyond seaward (outward) expansion, limited other opportunities for future cargo handling port expansion.

Containers and break bulk cargoes are handled on the east bank, with dry bulk, liquid bulk and vehicles being handled on the west bank of the river. Expansion plans include the potential development of a coal handling terminal on the west bank.

The Port of East London owns and operates the Princess Elizabeth Dry Dock which is core to the ship repair industry in the Eastern Cape. The dry dock facility has a length of 200m and a beam of 24.8m supported by 4 cranes.

While East London will continue to provide general cargo handling services to its hinterland, the constraints to expansion, the limited hinterland and the development of the new Port at Ngqura, suggest that the Port of East London will see limited growth in the 30 year planning horizon.





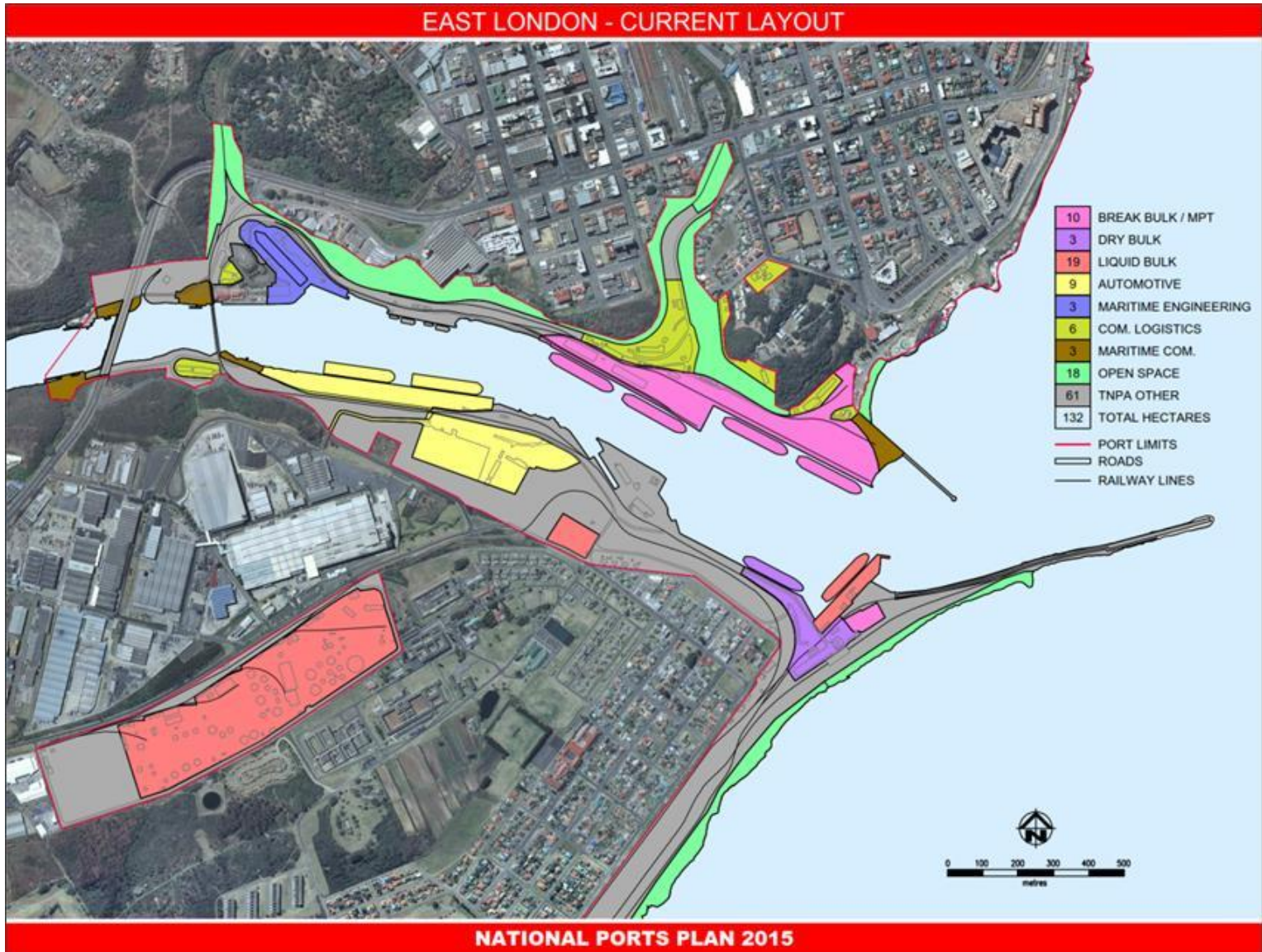
PORT OF EAST LONDON – AERIAL VIEW





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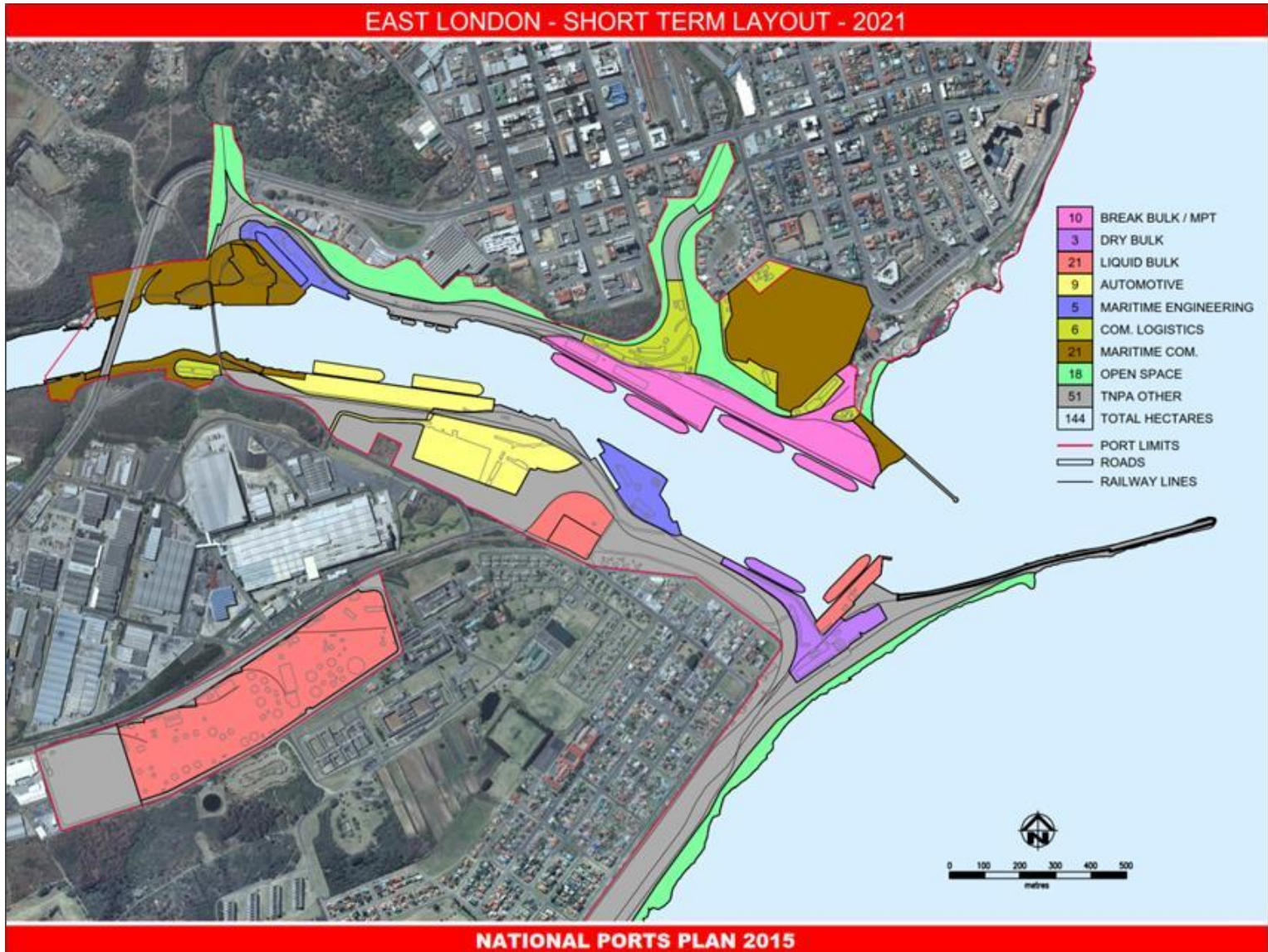
PORT OF EAST LONDON – CURRENT LAYOUT





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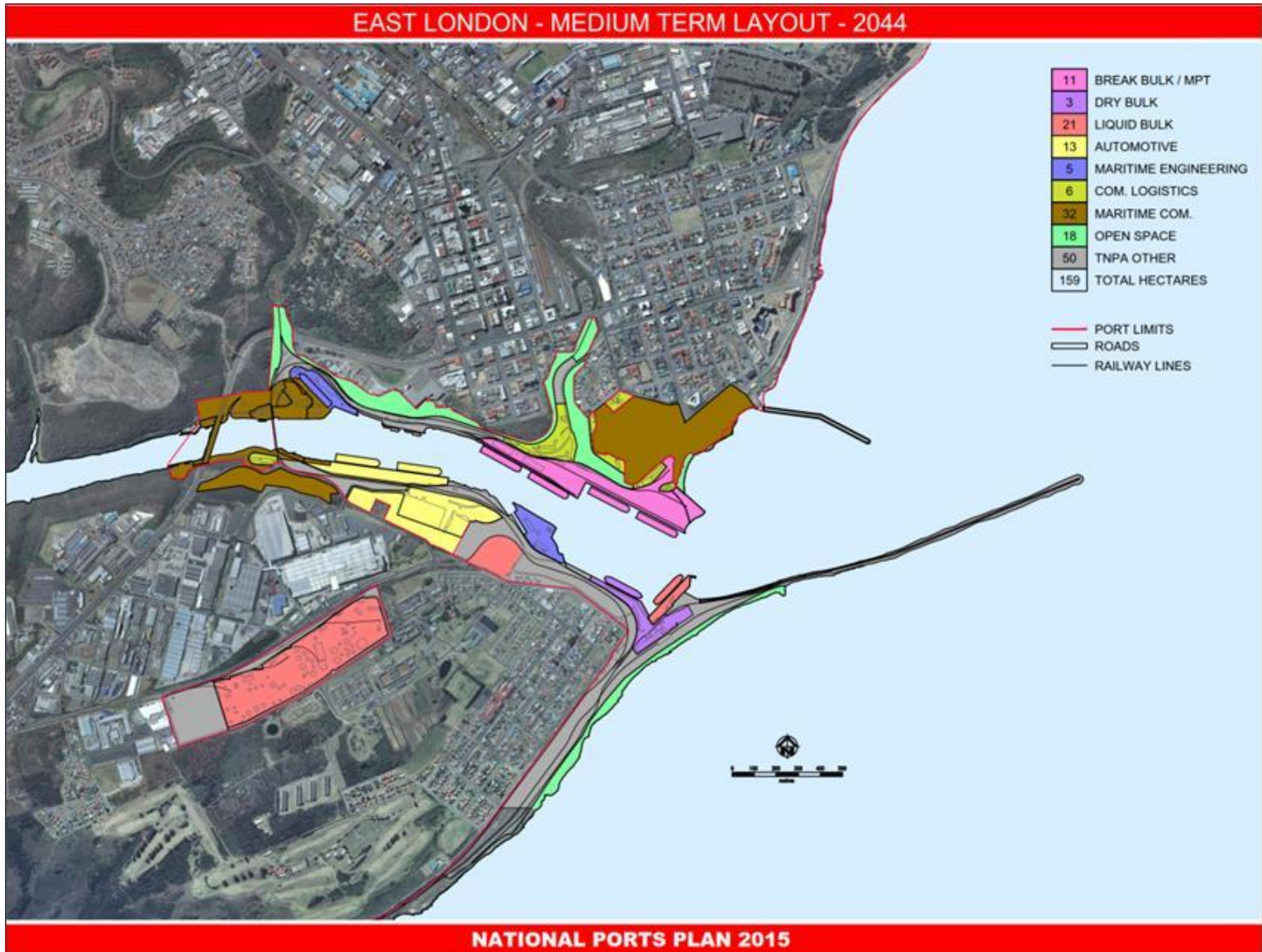
PORT OF EAST LONDON – SHORT TERM LAYOUT





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PORT OF EAST LONDON – MEDIUM TERM LAYOUT





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PORT OF EAST LONDON – LONG TERM LAYOUT

EAST LONDON - LONG TERM LAYOUT - BEYOND 2044





PORT OF NGQURA – ROLE OF THE PORT

Port of Ngqura is situated in Algoa Bay, some twenty kilometres north-east of the Port of Port Elizabeth, and is the newest port in the South African port system. The port became operational in 2009 and is intended to provide complementary services to the central ports of Port Elizabeth and East London. The port handles just over 6 million tonnes of cargo per year (over 400 vessel calls), with the 30 year forecast predicting up to 110 million tonnes of cargo per year.

The role of the Port of Ngqura has undergone numerous re-evaluations since its inception. However, the port has maintained its relationship to the Coega IDZ as a deep water port supporting the IDZ tenants. It has similarly maintained its role of providing cargo handling capacities that are beyond the limitations of the existing ports of Port Elizabeth and East London.

Originally planned as a bulk port, the port has been adapted for container handling. Port of Ngqura's current primary role is to target transshipment cargoes, both for East and West African ports, as well as for inter-continental transshipments. In addition, Port of Ngqura will continue to handle container cargoes for the local hinterland, and will be positioned to handle overflow Gauteng cargoes should capacity in Durban be exceeded.

In addition to containers, there are two other categories of potential cargo handling operations that will add to the role of the Port of Ngqura. The first is manganese ore export, which will catalyse Port of Ngqura's role as a bulk port. The second is the crude oil import and refined fuel export facilities.

The IDZ generated projects (current and future potential), collectively indicate a significant role for Port of Ngqura as a port servicing the CDC's tenants. Most relevant is the potential development of the Mthombo Refinery.

The internal road network is in a very good condition and no congestion problems are experienced. The port has good connectivity to the N2 national highway which has adequate capacity for future traffic growth. The container terminal is rail-served and well positioned to handle the future shift from road to rail.



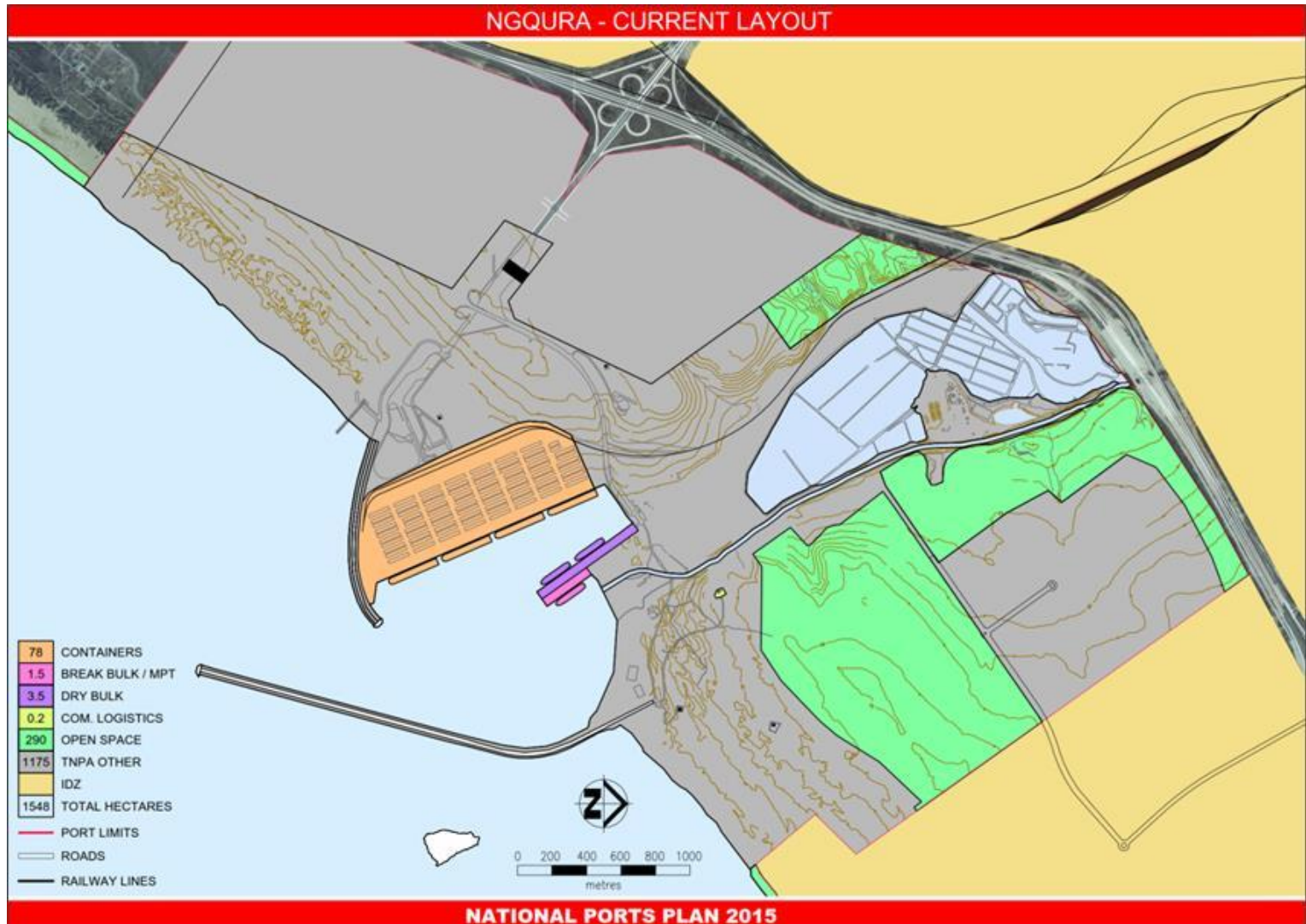


PORT OF NGQURA – AERIAL VIEW



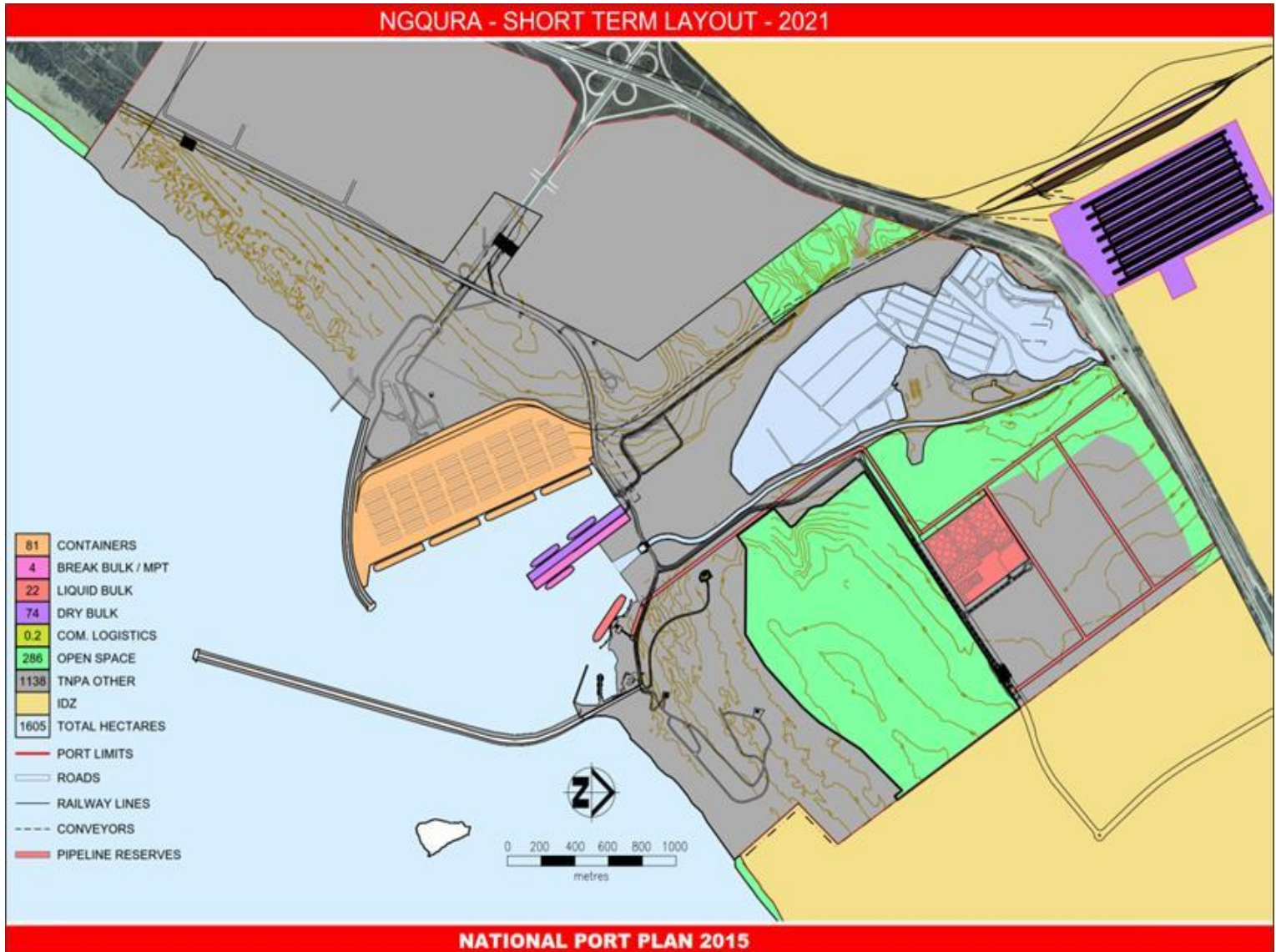


PORT OF NGQURA – CURRENT LAYOUT



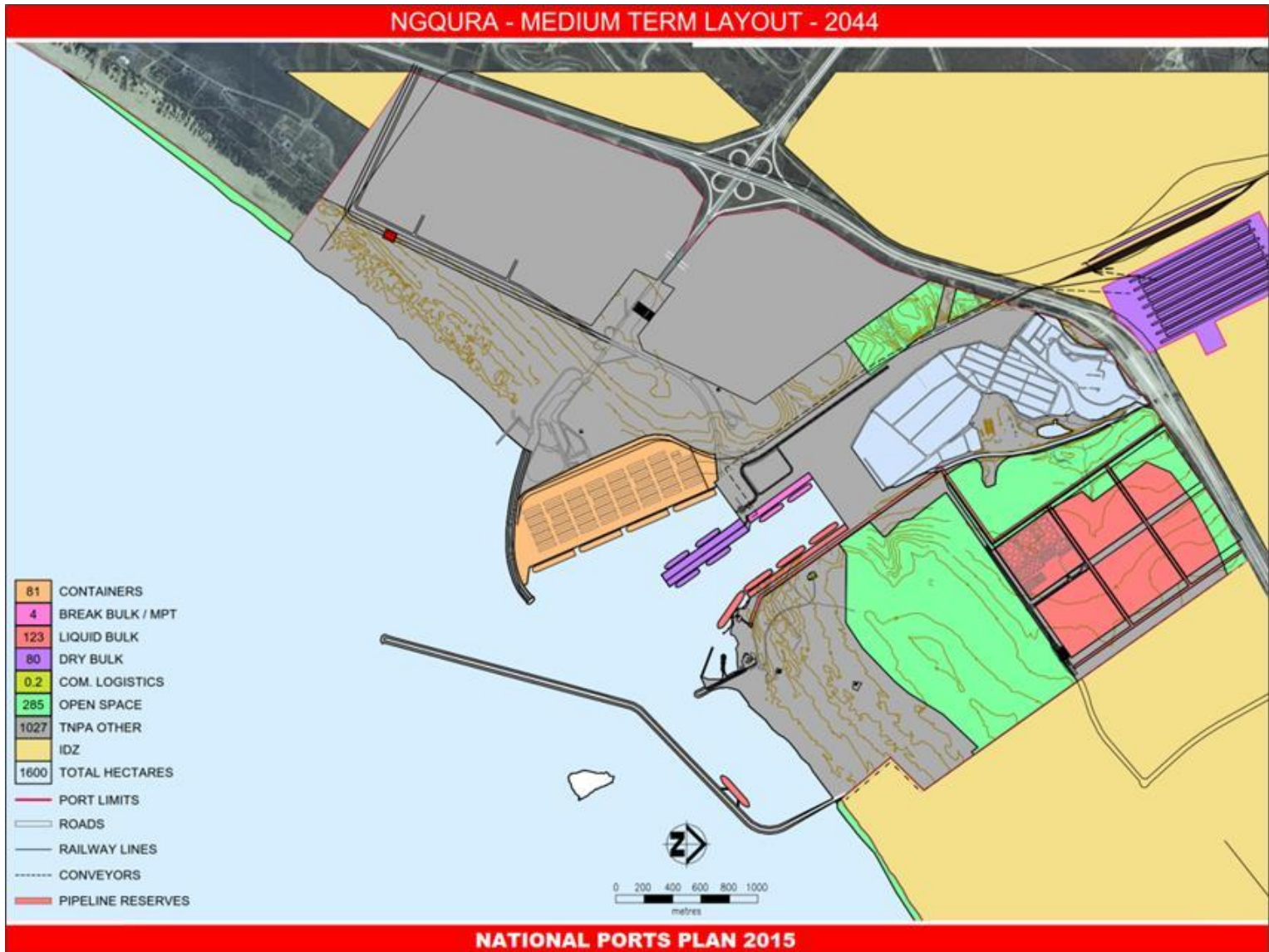


PORT OF NGQURA – SHORT TERM LAYOUT





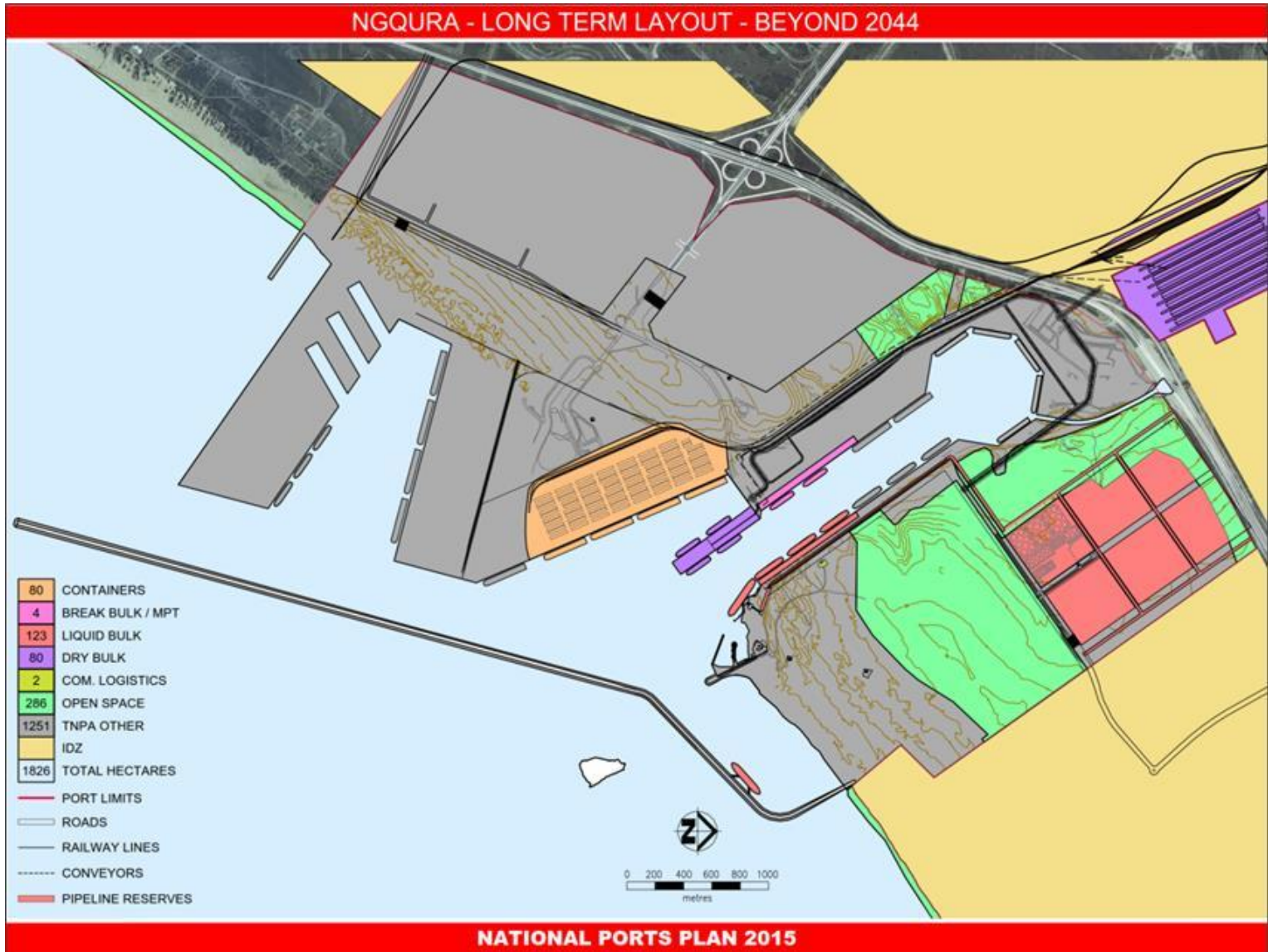
PORT OF NGQURA – MEDIUM TERM LAYOUT





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PORT OF NGQURA – LONG TERM LAYOUT





PORT OF PORT ELIZABETH – ROLE OF THE PORT

Port of Port Elizabeth is an established port in the central region, presently handling containers, manganese ore, liquid bulk, vehicles and general cargo. Demand for cargo handling is for automotive and agricultural products in the Nelson Mandela Bay Metro and the Eastern Cape interior, manganese exports from the Northern Cape and refined petroleum products for regional consumption.

With the operationalisation of the new Port of Ngqura, the role of Port of Port Elizabeth is changing from being the primary central port, to one providing niche services complementary to the Port of Ngqura. In the short term, rationalisation of activities will see manganese exports and liquid bulk imports moved to the Port of Ngqura.

The port handles over 11 million tonnes of cargo per year (approximately 950 commercial cargo vessel calls), with the 30 year forecast predicting volumes to increase to over 18 million tonnes per year.

The port's future plans include the container terminal's expansion, berth deepening and stack reconfiguring. Once the manganese and liquid bulk terminals are decommissioned, the vehicle terminal will be relocated to that region. There are also plans for development of land for recreational use.

There are facilities for local fishing and maritime engineering (including boat and ship repair and building and yacht building). The port has plans to extend these facilities and marina development by commercially developing vacant Transnet land adjacent to the port and CBD. An area within the port is allocated for aquaculture farming.



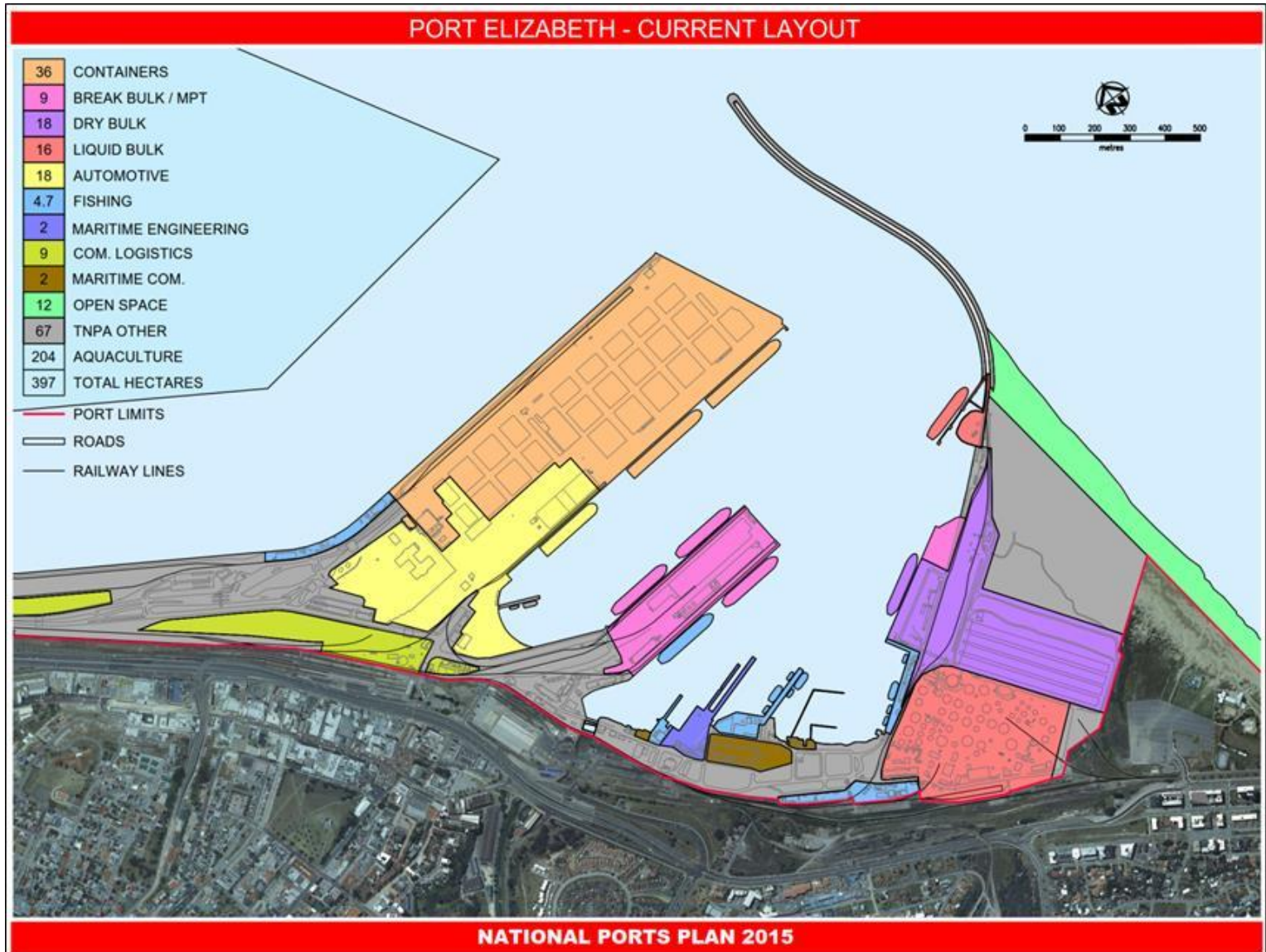
PORT OF PORT ELIZABETH – AERIAL VIEW





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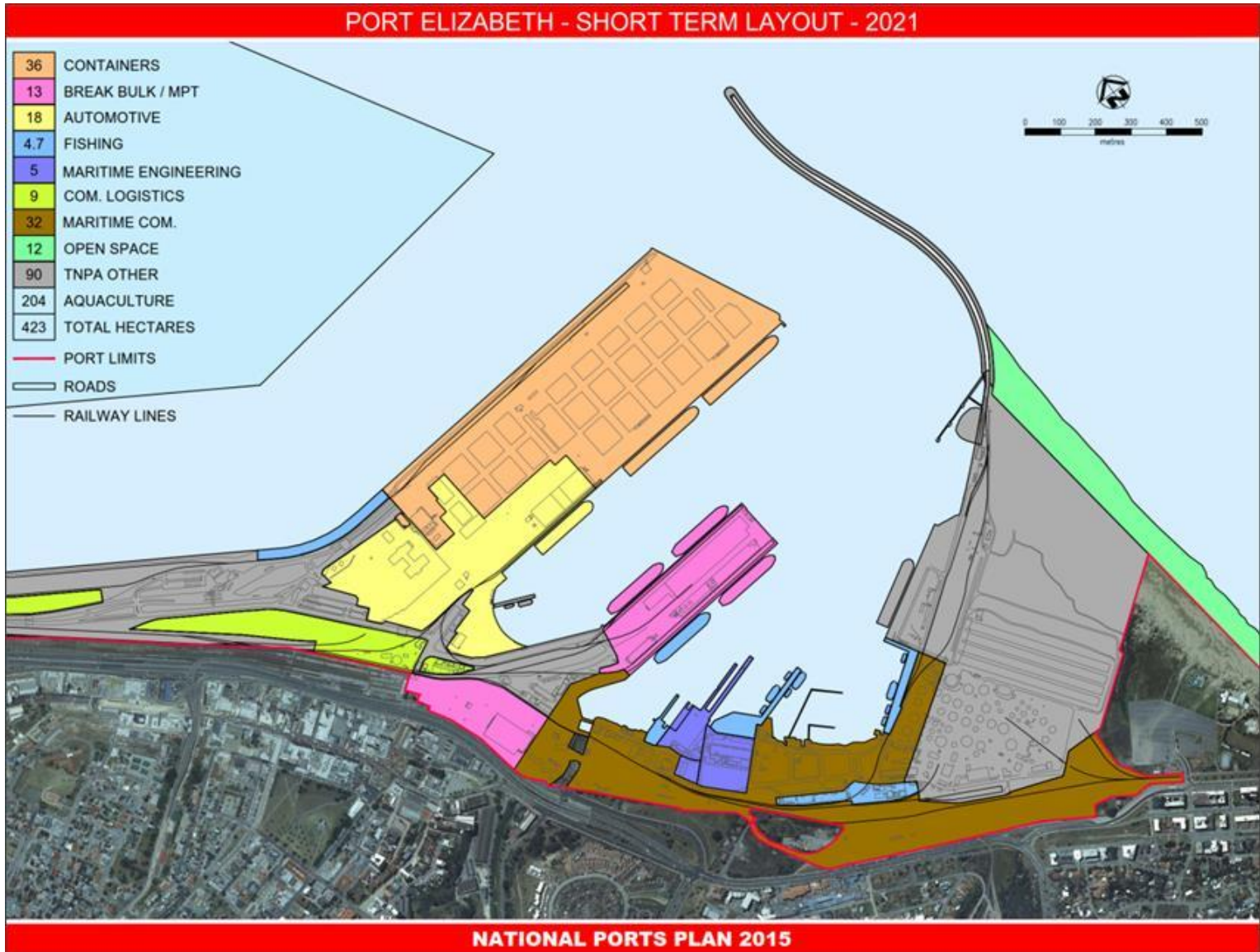
PORT OF PORT ELIZABETH – CURRENT LAYOUT





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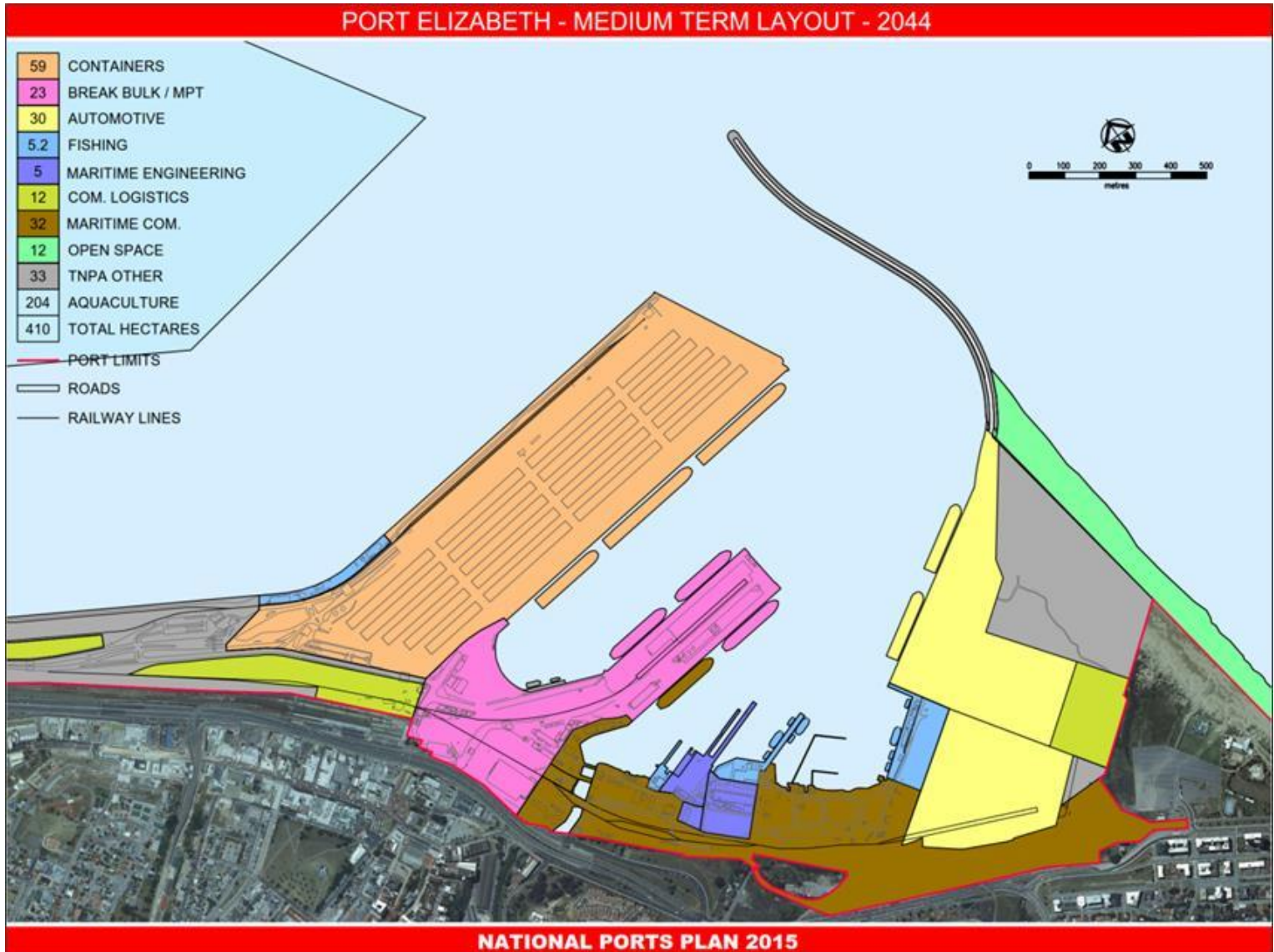
PORT OF PORT ELIZABETH – SHORT TERM LAYOUT





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PORT OF PORT ELIZABETH – MEDIUM TERM LAYOUT

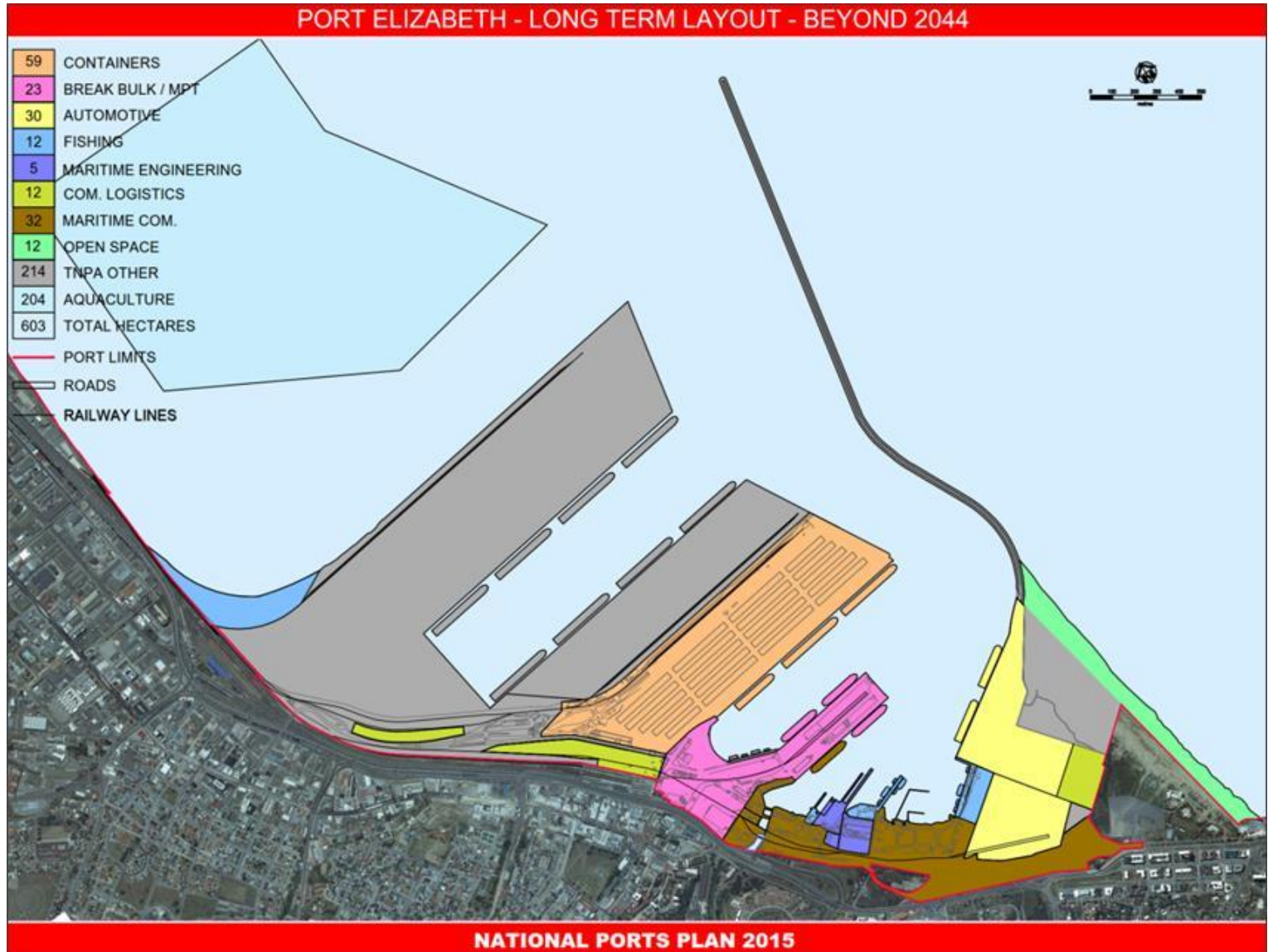


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PORT OF PORT ELIZABETH – LONG TERM LAYOUT





PORT OF MOSSEL BAY – ROLE OF THE PORT

Port of Mossel Bay is home to a local fishing fleet and also serves recreational boaters. There is very limited freight handling in the port (30 000 tonnes per year), though almost 1.9 million tonnes per year is handled through the CBM and SPM. The port handles around 690 vessel calls a year. The majority of which are small supply tugs to support breakbulk to the offshore rigs which uses around 60m in mooring length at Quay 4. 156 liquid bulk vessels use the offshore moorings to transfer their cargo from the SPM and CBM per year.

The current infrastructure capacity is sufficient to meet demand forecasts over the next 30 years. There is a small waterfront and the port plans to commercially develop vacant Transnet land adjacent to the port and CBD.





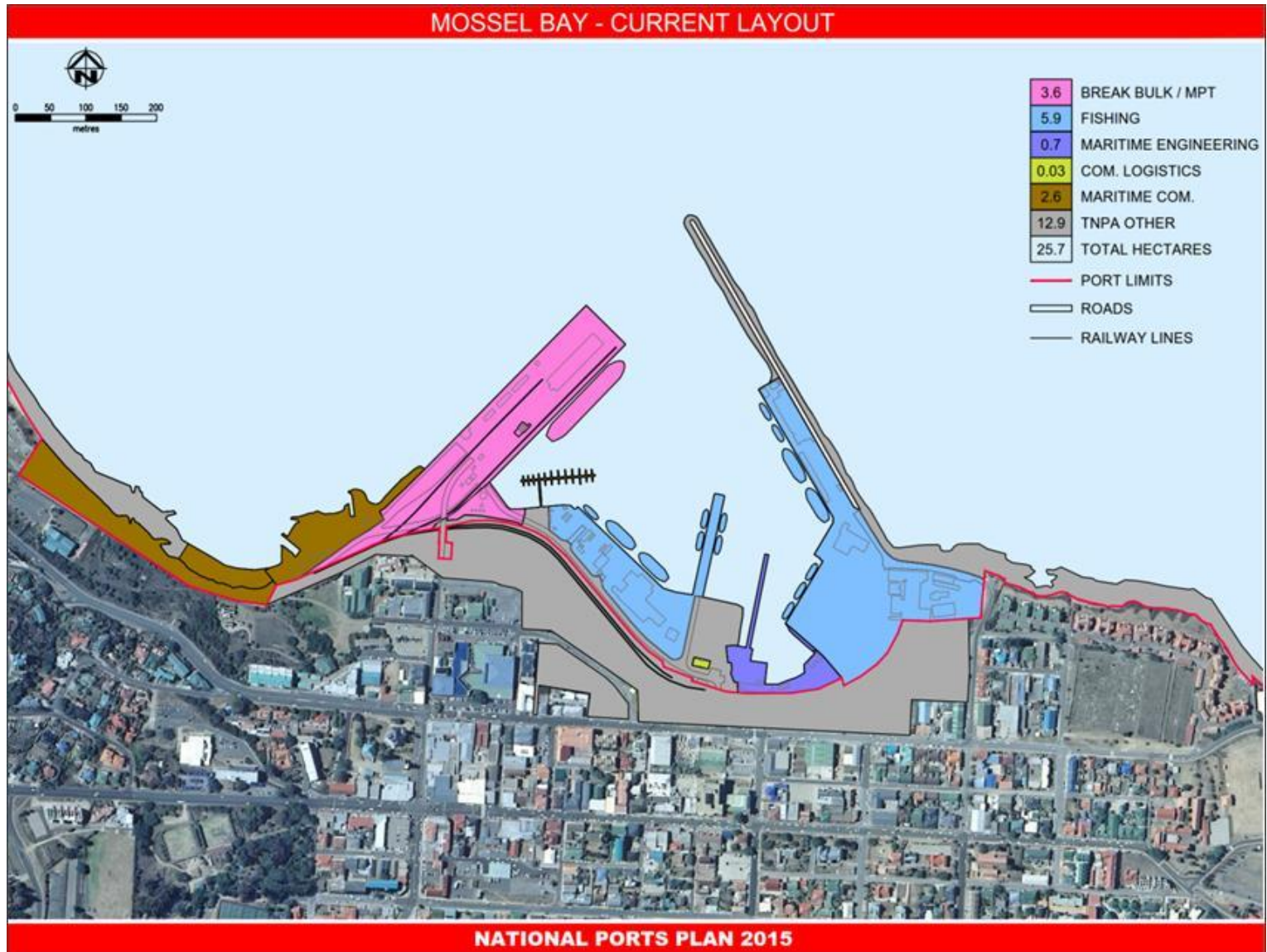
PORT OF MOSSEL BAY – AERIAL VIEW





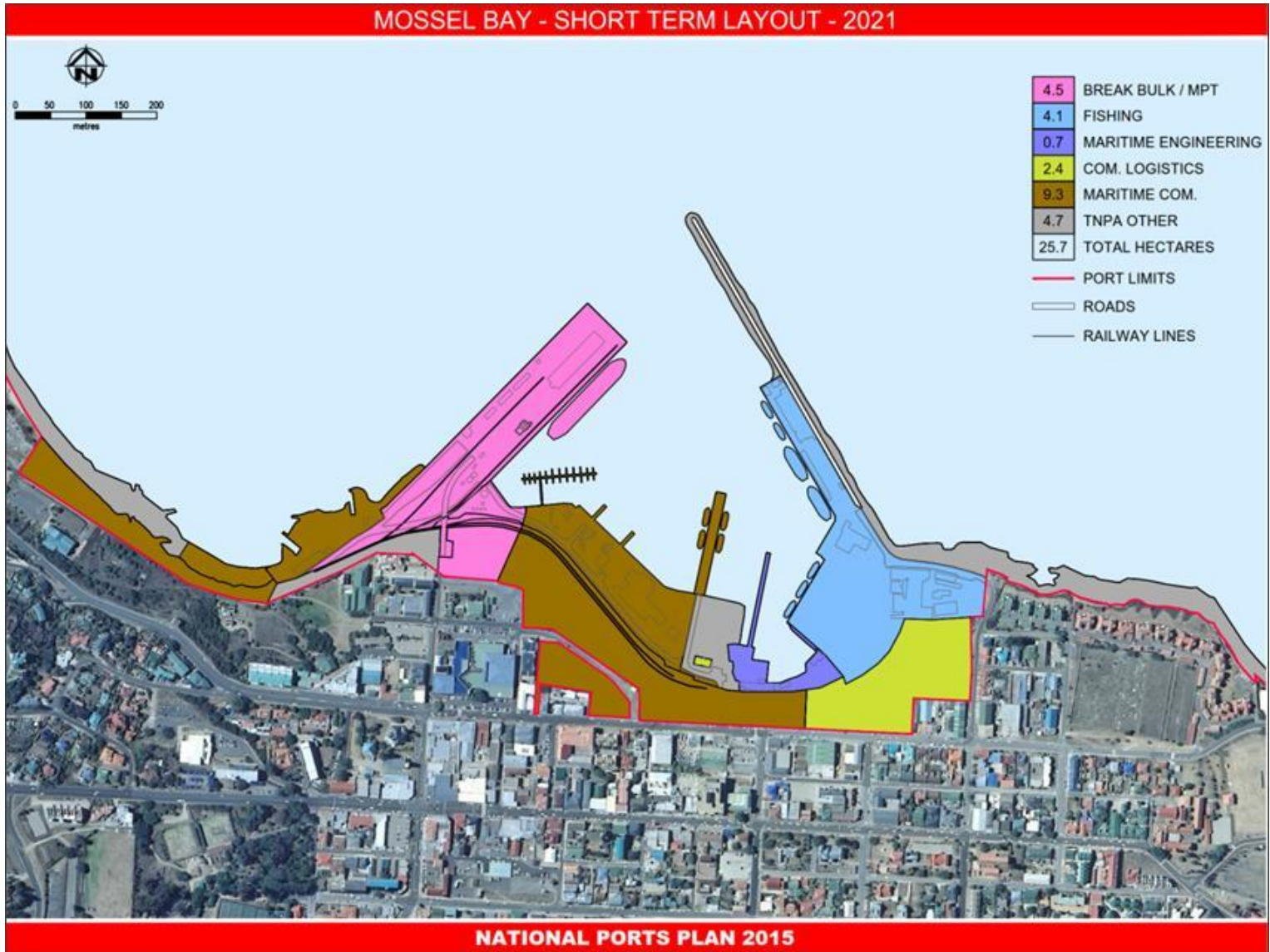
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PORT OF MOSSEL BAY – CURRENT LAYOUT





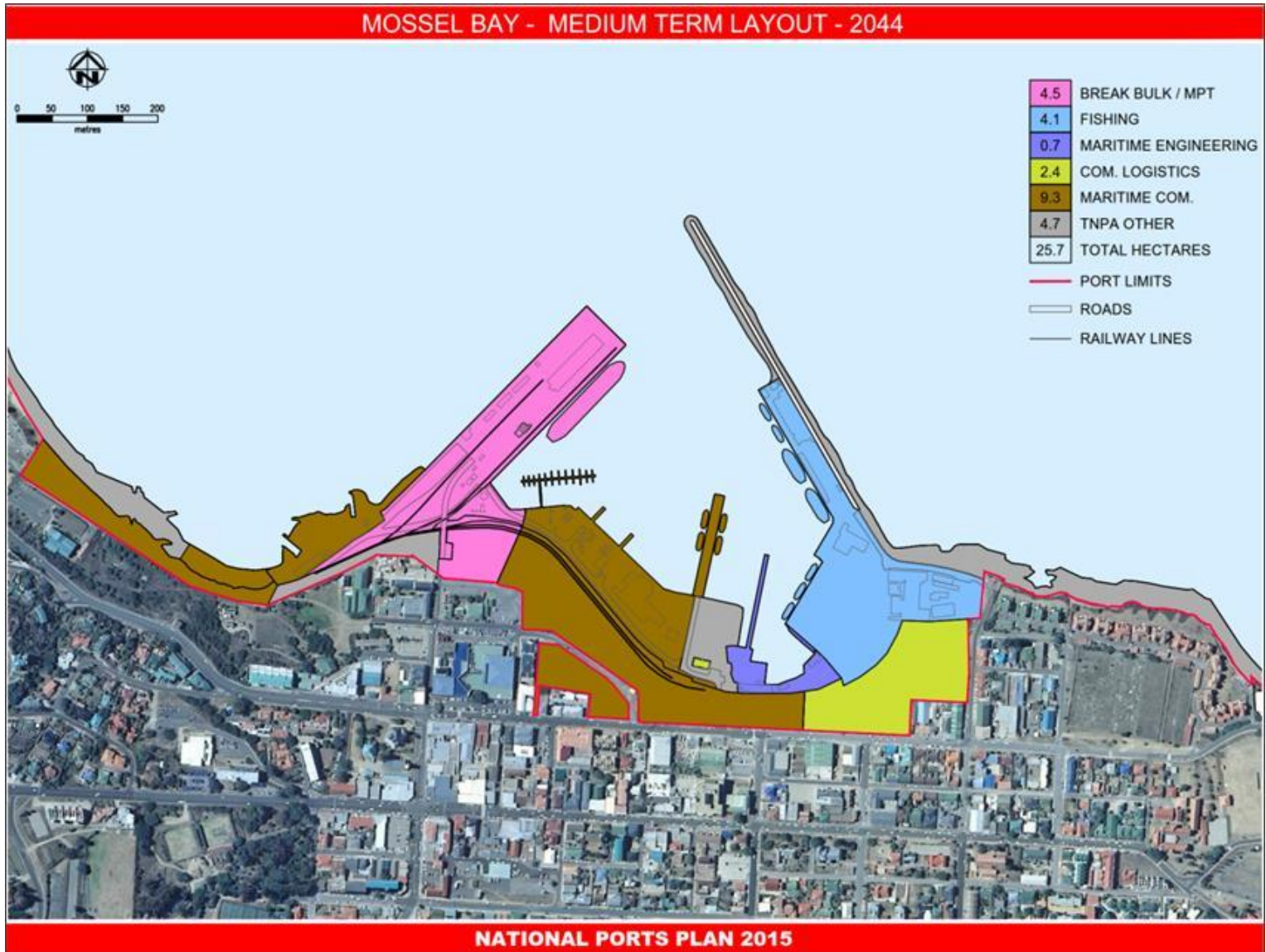
PORT OF MOSSEL BAY – SHORT TERM LAYOUT





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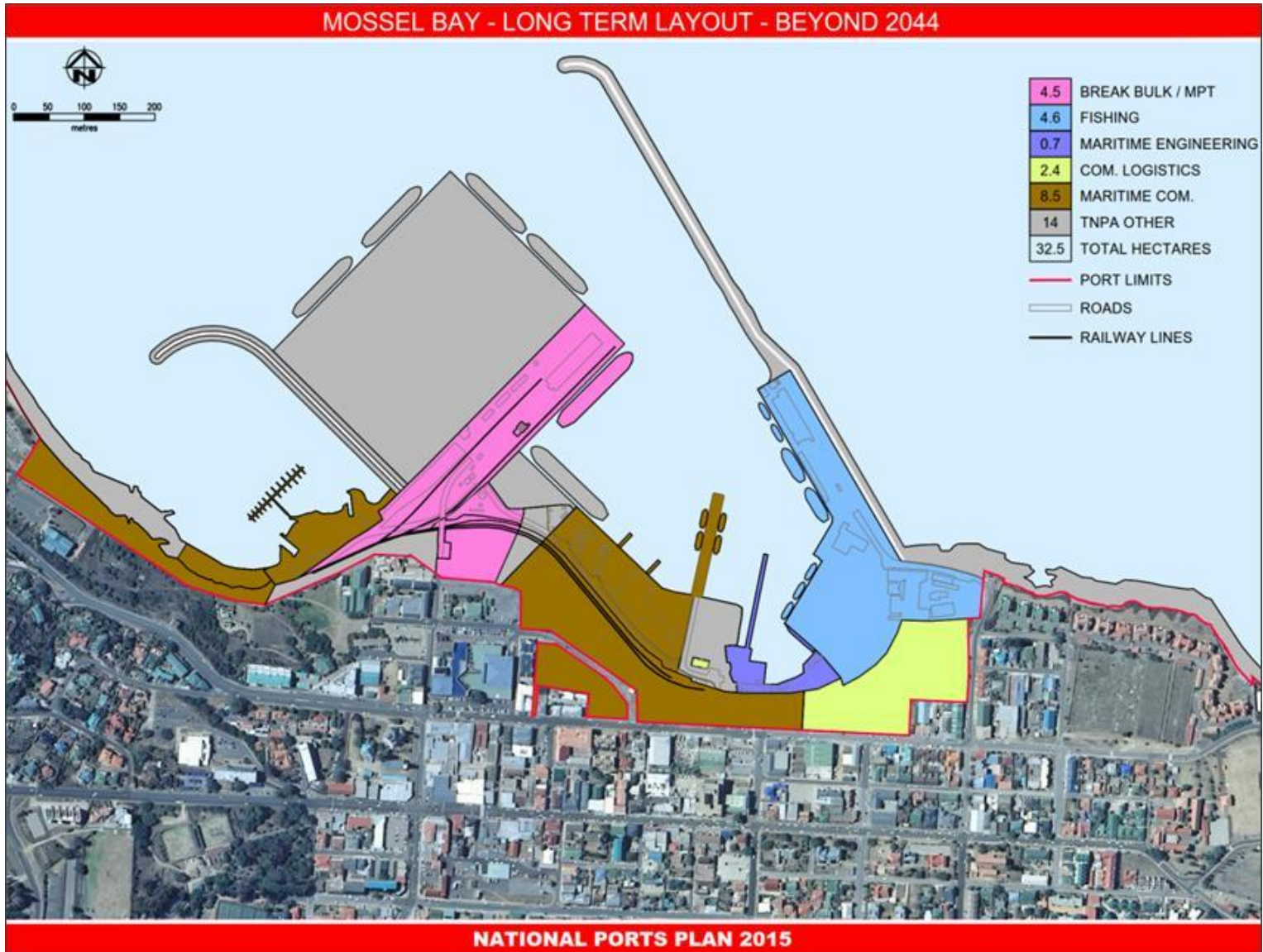
PORT OF MOSSEL BAY – MEDIUM TERM LAYOUT





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PORT OF MOSSEL BAY – LONG TERM LAYOUT





PORT OF CAPE TOWN – ROLE OF THE PORT

Port of Cape Town is an established port in the western region, providing container, bulk and general cargo handling services to the Western Cape and its largely agricultural hinterland. The port handles around 13 million tonnes of cargo per year (about 3000 vessel calls), with the 30 year forecast predicting around 25 million tonnes of cargo per year.

The port provides much-needed ship repair services in the Western Cape region, and hosts local and foreign fishing fleets, cruise liners and recreational users.

The older basins of the port were developed into the Victoria and Alfred Waterfront and now fall outside of port limits, complementing the commercial port by providing berthing for smaller recreation and fishing vessels.

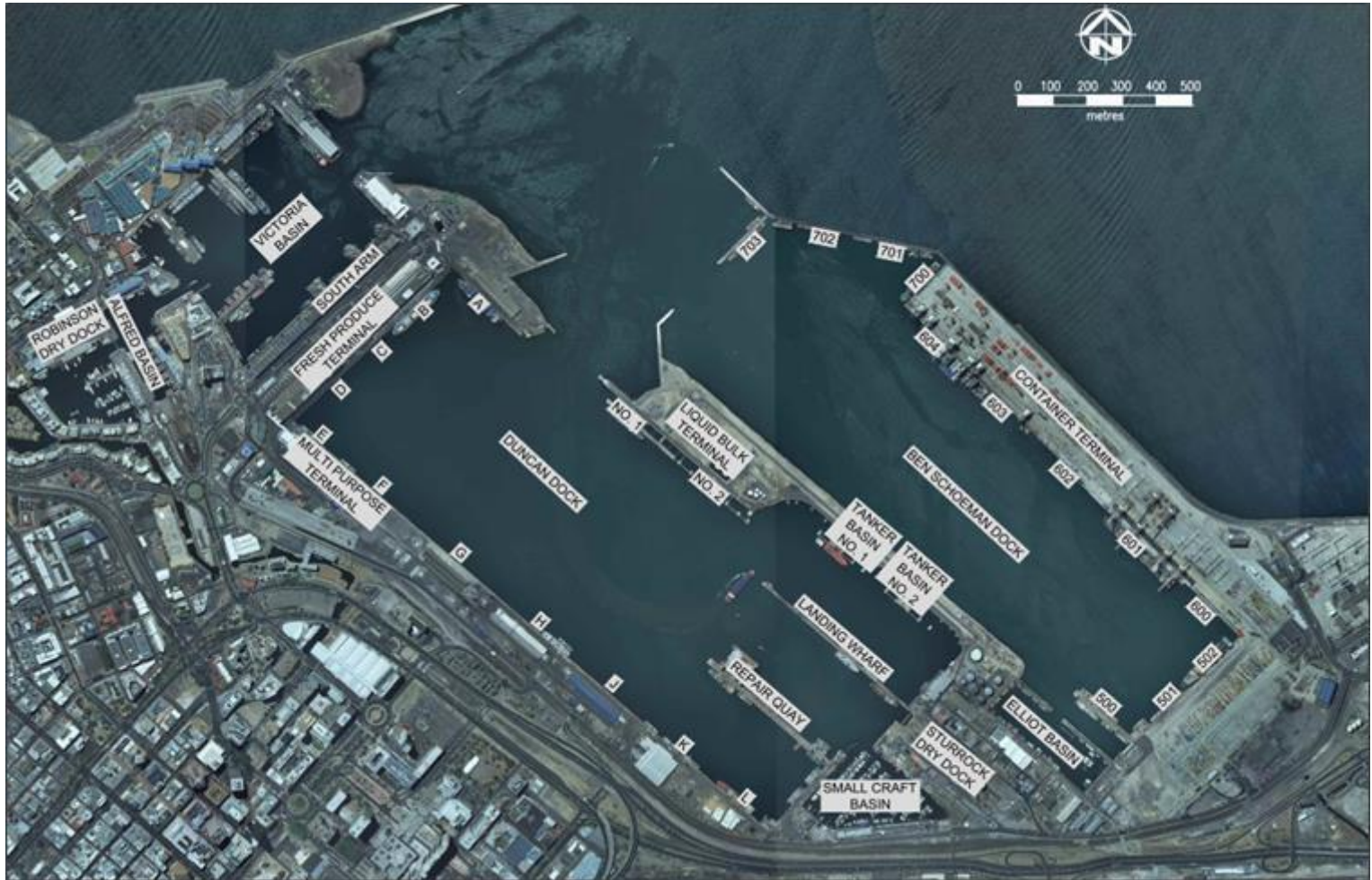
A new development in the Port will be the major upgrade of a state of the art dedicated cruise terminal, a first of its kind in Africa which will further boost cruise tourism in the region. Short term plans include the expansion of the container terminal to increase capacity, the expansion of the landside area for ship repair and the development of 160ha of the Culemborg site for back-of-port commercial logistics. Medium term plans include expanding the container stacking seaward with additional berths in the Schoeman Basin and in the long term building an outer basin.

It is anticipated that the Port of Cape Town will continue in its existing role as primary container and general cargo port for the Western Cape region, with the Port of Saldanha Bay playing a complementary role as the region's primary dry and liquid bulk port.





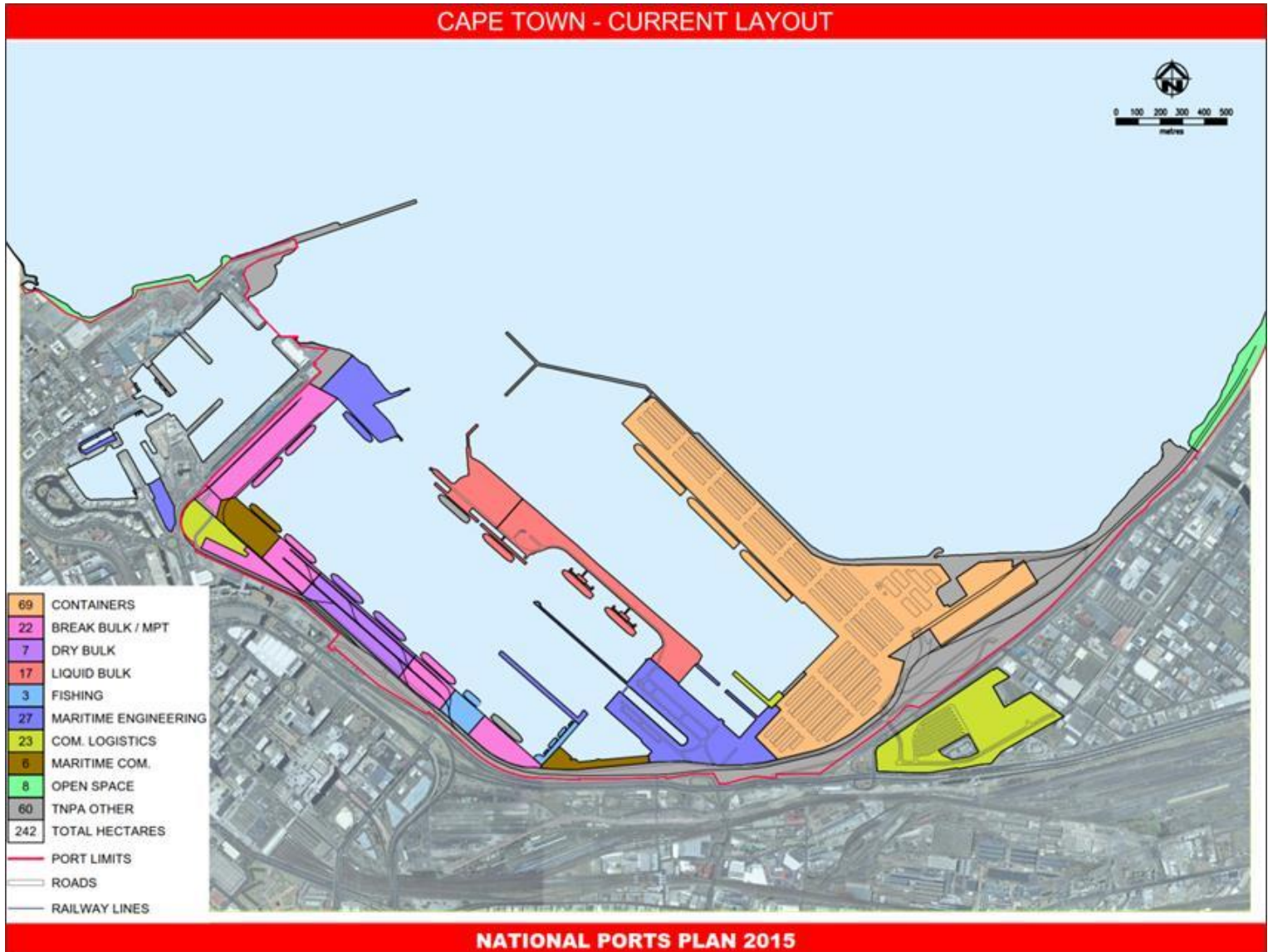
PORT OF CAPE TOWN – AERIAL VIEW





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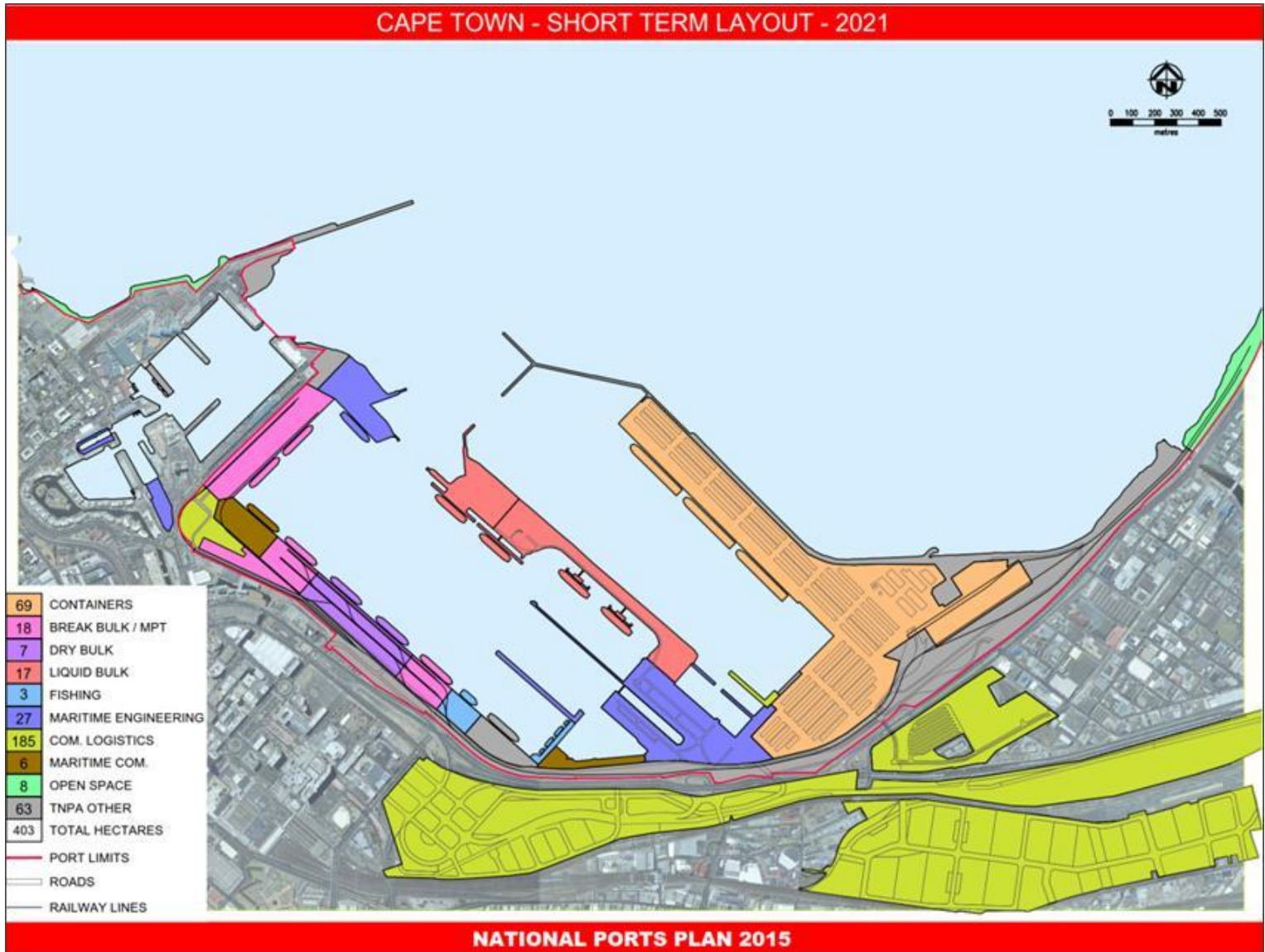
PORT OF CAPE TOWN – CURRENT LAYOUT





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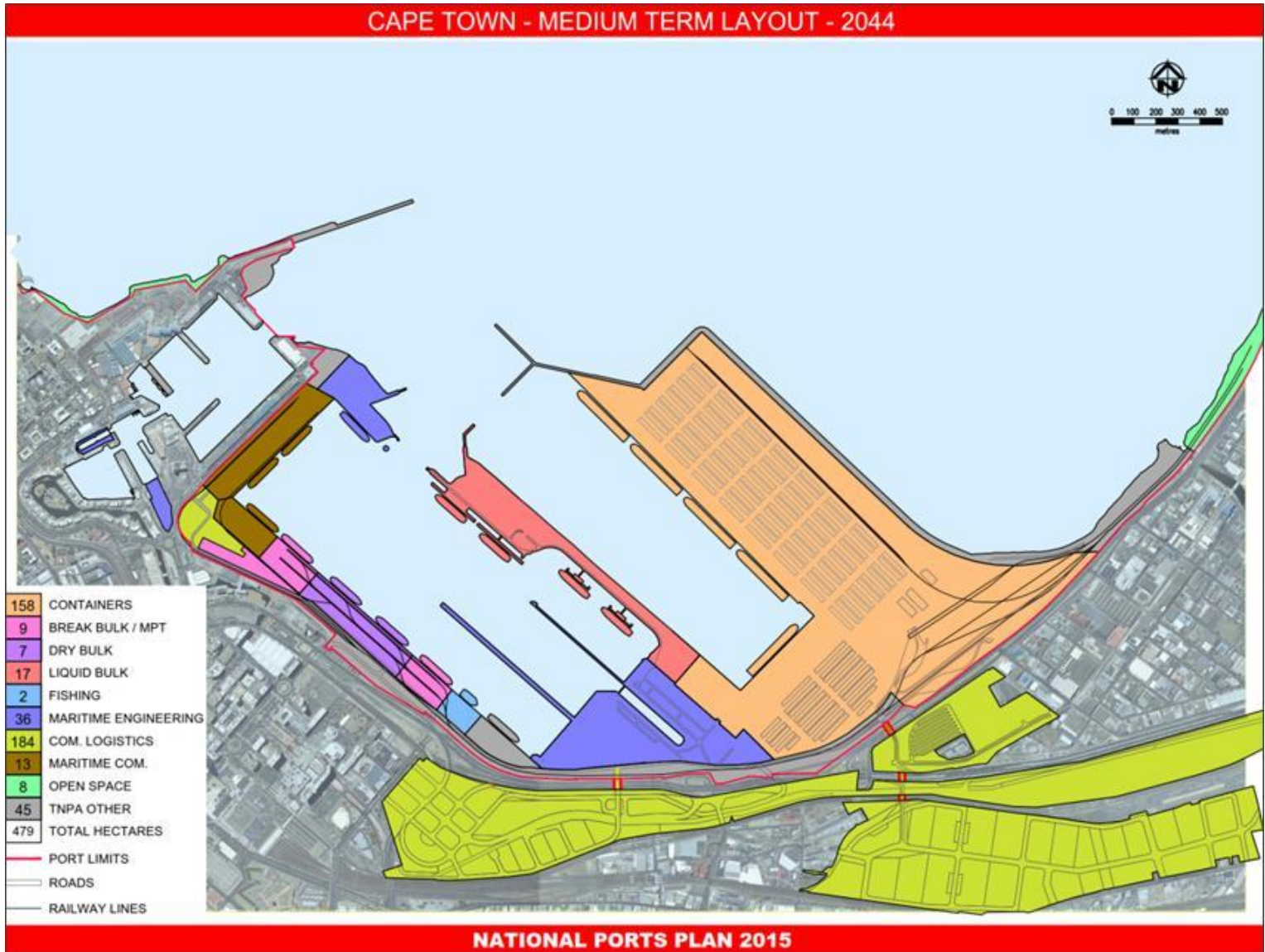
PORT OF CAPE TOWN – SHORT TERM LAYOUT





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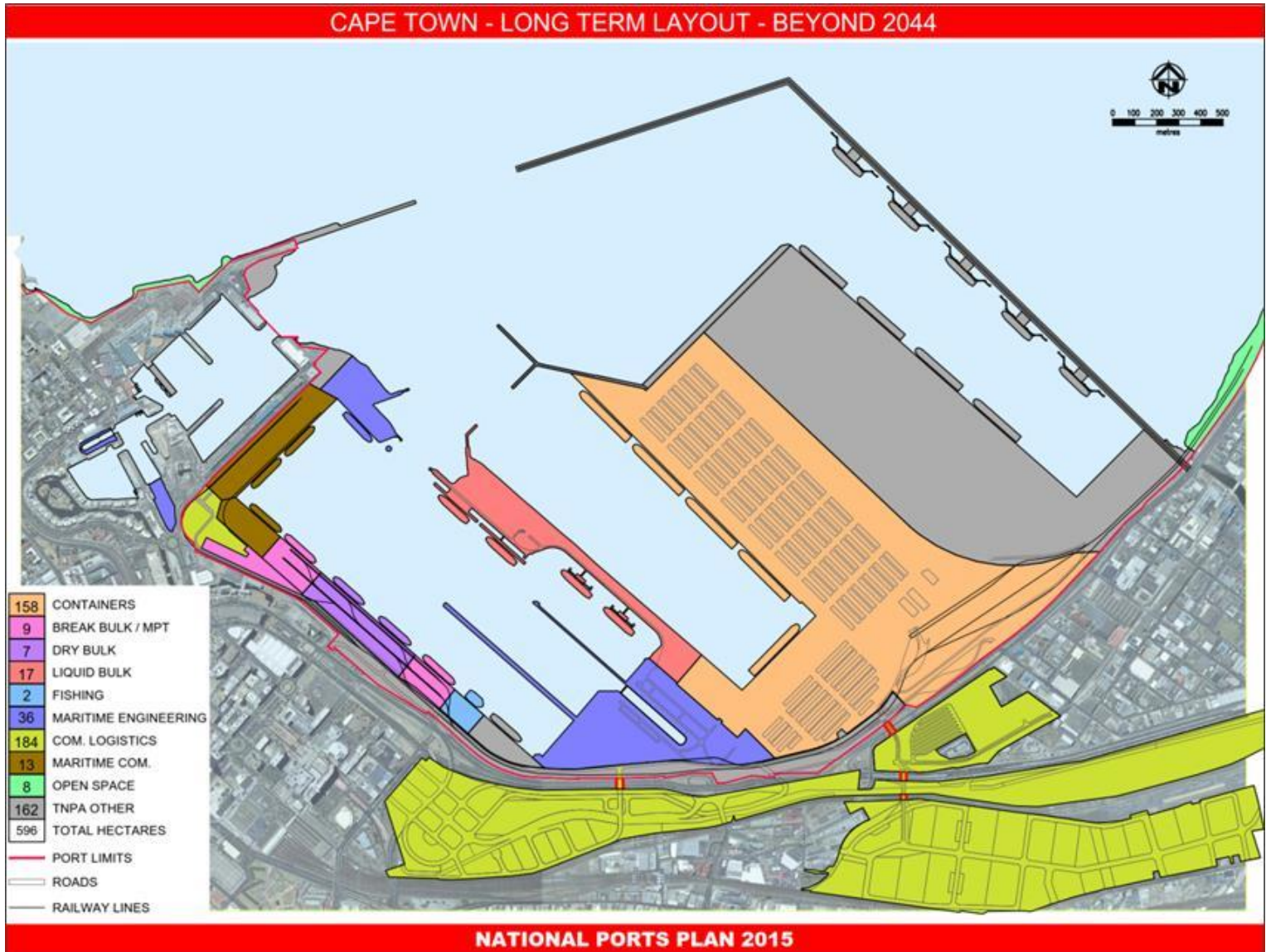
PORT OF CAPE TOWN – MEDIUM TERM LAYOUT





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PORT OF CAPE TOWN – LONG TERM LAYOUT





PORT OF SALDANHA BAY – ROLE OF THE PORT

The Port of Saldanha Bay is South Africa's deepest draft port and handles around 67 million tonnes of cargo per year (about 500 vessel calls), with the 30 year forecast predicting around 160 million tonnes of cargo per year. The iron ore export jetty provides berthing for two Very Large Bulk Carriers (VLCCs), while a liquid bulk berth provides for Very Large Crude Carriers importing crude oil. The port has iron ore stockpiles on reclaimed land, a multi-purpose terminal with four berths, and an oil terminal with a design capacity of 25 million tonnes per annum.

The port was initially conceived as an iron ore export facility in order to exploit the discovery of high-grade ore at Sishen in the Northern Cape, 860km to the north east of Saldanha Bay. The first shipment was loaded in 1976 and current levels of export are in the region of 57 million tonnes per year to North and South America, Europe, Asia and the Middle East. The port also imports around 7 million tonnes of crude a year.

The port has the potential to expand waterside and landside infrastructure to support the proposed industrial development zone. The proposed first phase of the IDZ includes facilities for the oil and gas industry, in the form of cargo handling and repair facilities. The port is also cooperating with the Department of Energy for the development of an LNG terminal.

The Port of Saldanha Bay occupies an area of considerable ecological biodiversity and is surrounded by a complex socio-economic environment, which requires careful management of activities and planning future development of infrastructure.





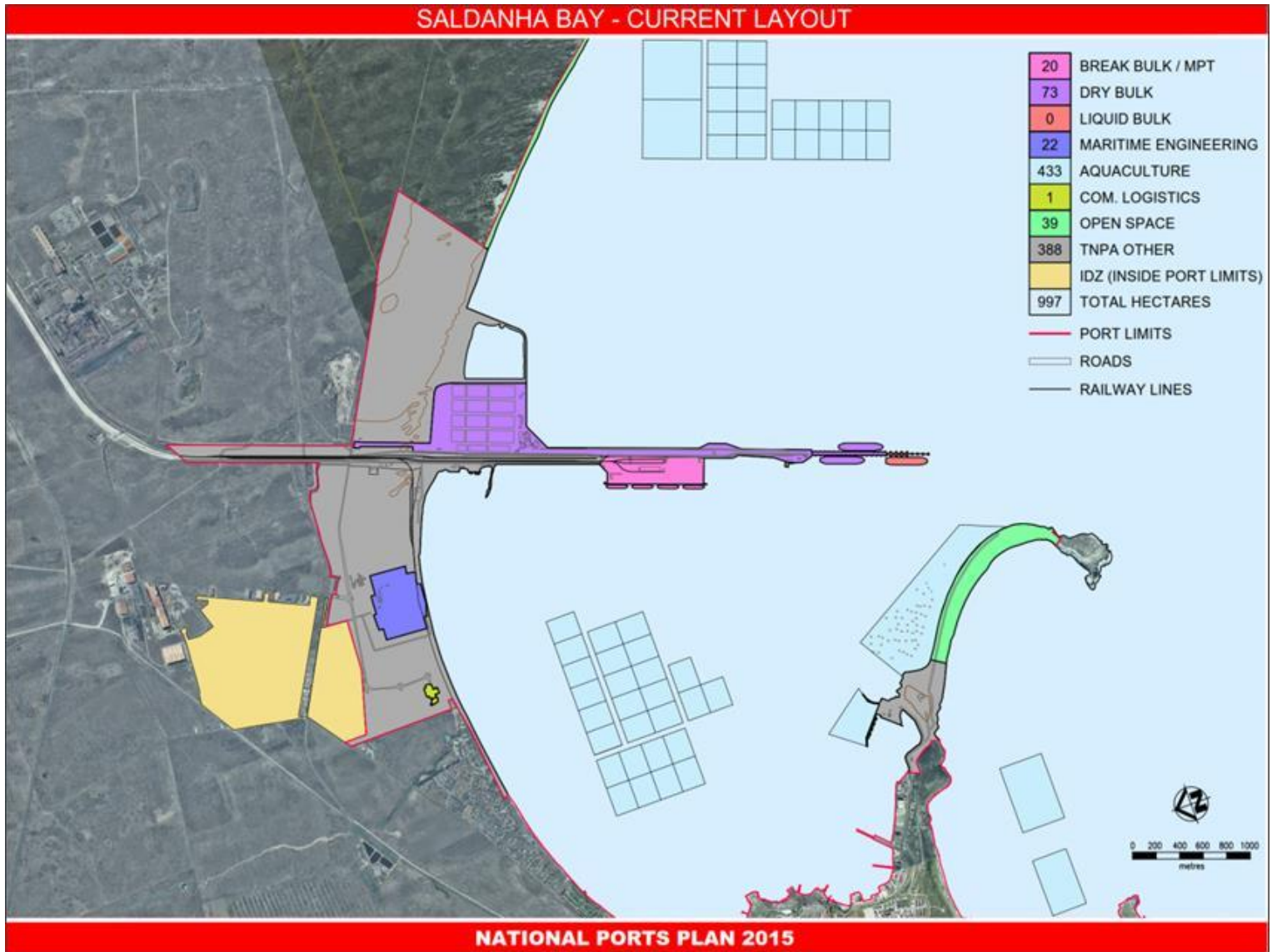
PORT OF SALDANHA BAY – AERIAL VIEW





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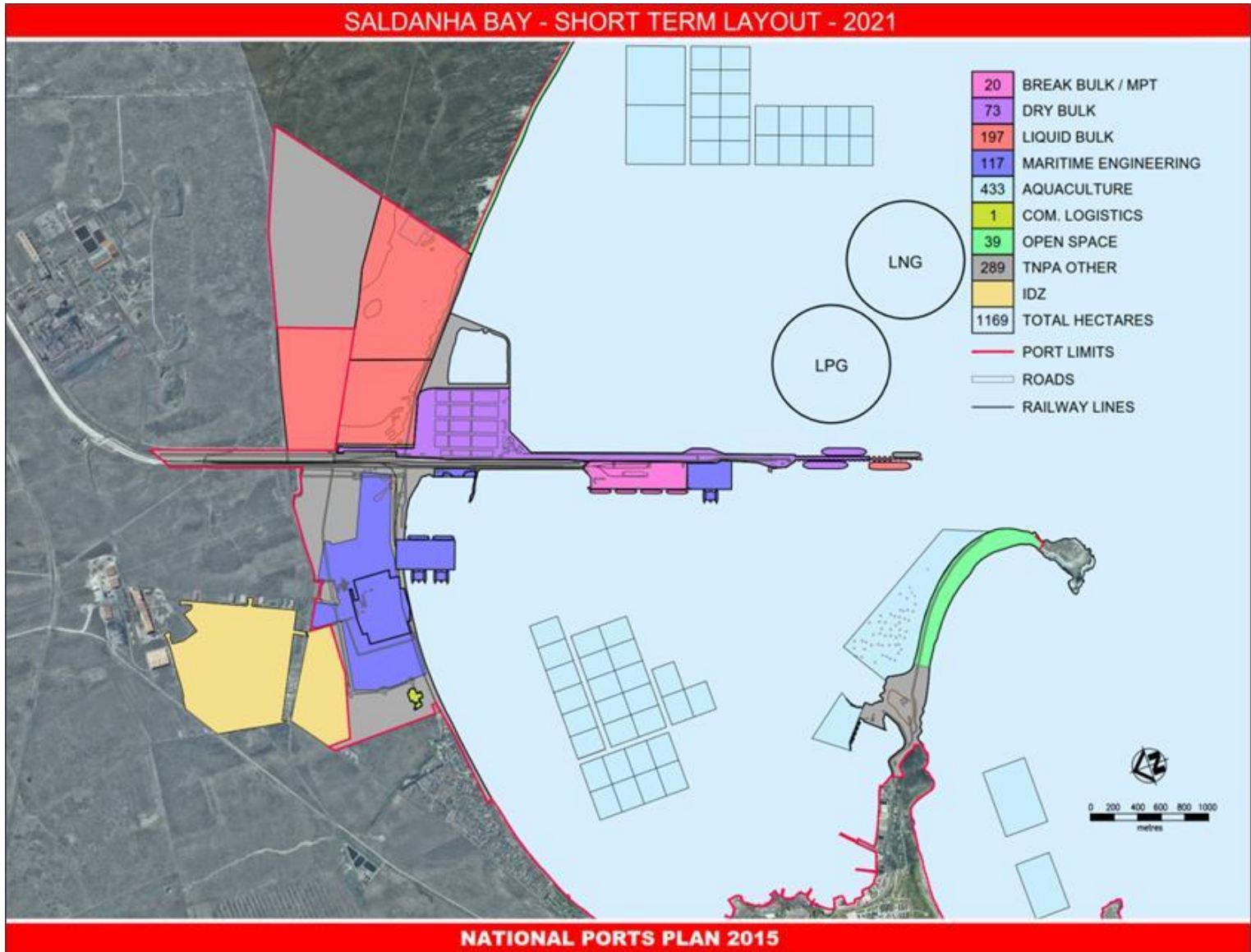
PORT OF SALDANHA BAY – CURRENT LAYOUT





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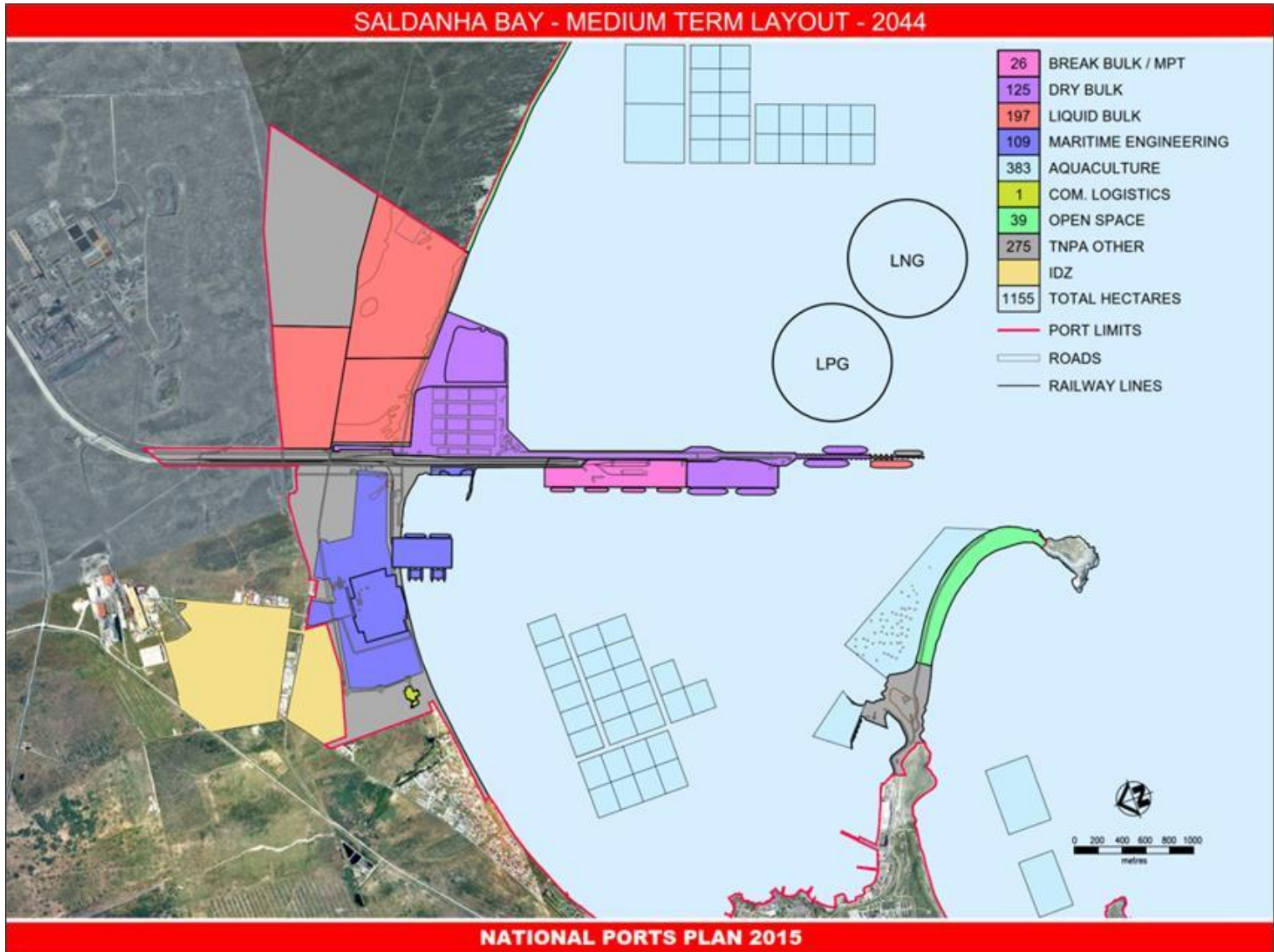
PORT OF SALDANHA BAY – SHORT TERM LAYOUT





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PORT OF SALDANHA BAY – MEDIUM TERM LAYOUT

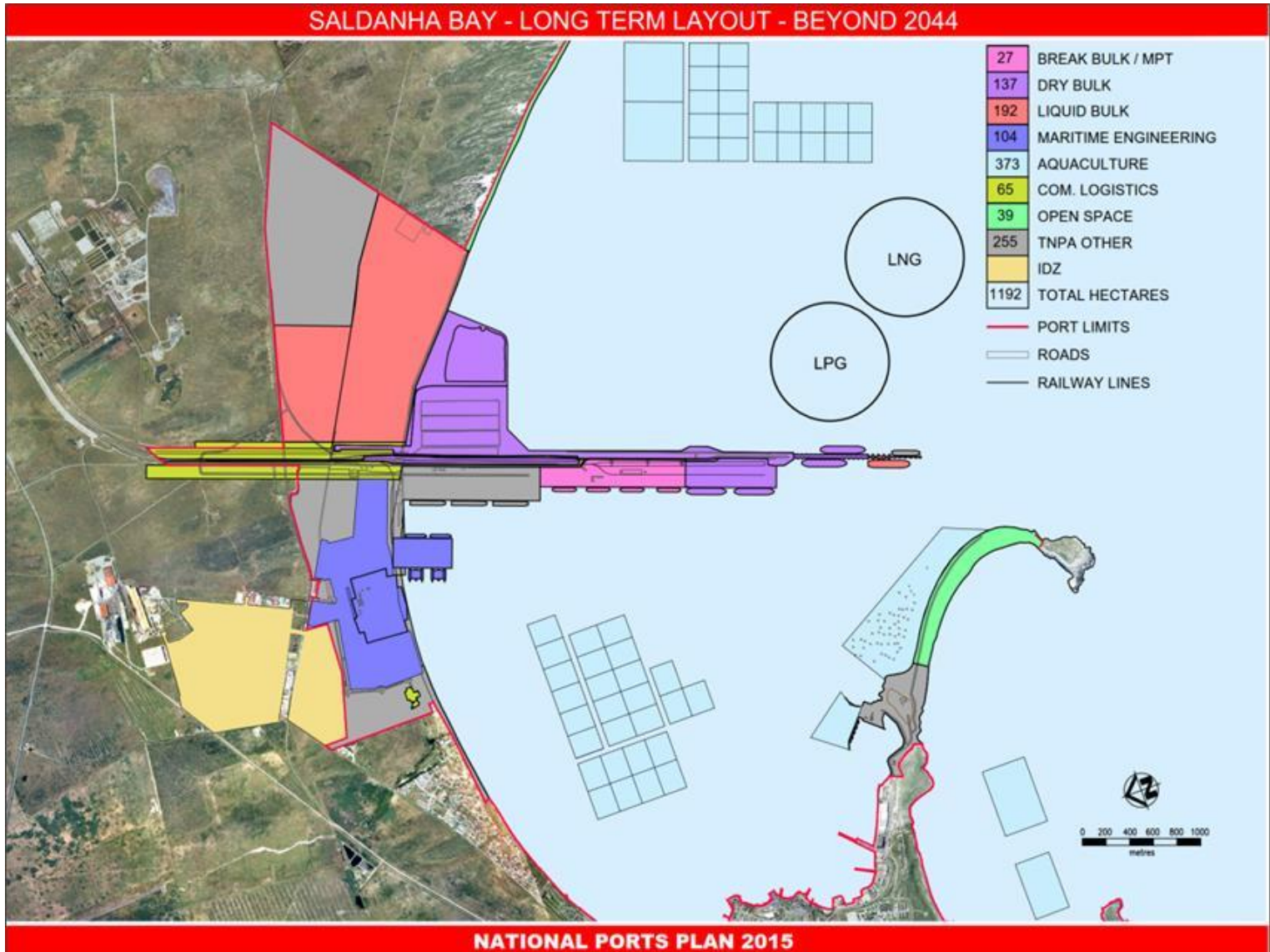


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PORT OF SALDANHA – LONG TERM LAYOUT





PORT OF PORT NOLLOTH – ROLE OF THE PORT

Port of Port Nolloth is the only natural harbour (for small craft) in the Northern Cape and comprises infrastructure that dates back to early mining activities. The infrastructure has now become more appropriate for support services to offshore mining operations, due to many limitations of the waterside infrastructure.

The port is currently leased to De Beers Group Services (Pty) Ltd for a period of ten years which began on 1 August 2006. De Beers uses the port as an offshore supply base for conducting diamond prospecting activity in Namibia. Smit Amandla supply vessels are stationed in the Port of Port Nolloth and are used for transferring frozen and dry foods, medicine, clothing, oil and lubricants, fuel, steel, gas and fresh water to De Beers' offshore prospecting vessels. No general cargo or fish is landed at the port.



PORT OF PORT NOLLOTH – AERIAL VIEW





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PORT OF PORT NOLLOTH – CURRENT LAYOUT



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