Development Perspective on Port of Cape Town Container Logistics Chain

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SAPICS 2023 on Western Cape Development and Trade Growth

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Content of Presentation

• Economy – Trade - Logistics
• Logistics Chain
• Economic Impact
• Logistics Dashboard
• Proposed Way Forward
1. Review of Maritime Transport – Navigating Stormy Waters

1. Economy, Maritime Trade and Containers

2. Maritime trade recovery in 2021, but unprecedented logjam in logistics – supply side constraints – average container schedule delays doubled

3. Improved resilience needed, including information management with appropriate indicators
2. Macro Logistics Chain for Port of Cape Town Containers

- National Government
- Exporters
- Packhouses Cold Stores DC's
- Container Depots
- Transnet OD's
- Shipping Lines
- Importers
- Transporters

Provincial Government

Metro, District & Local Government

Industry Associations
3.2.2. Contribution of CT Container Terminals to Western Cape Economy

It is estimated that container terminals contributed towards R72.5 bn of the GVA in Western Cape in 2021 (8.6%) and to the creation/sustaining of 225,000 jobs. Taxes paid from these activities was almost R20 billion.

Difference between high and low growth scenarios for 2026 (at current prices) is as follows:

<table>
<thead>
<tr>
<th>Indicator</th>
<th>High Growth</th>
<th>Low Growth</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>GVA R’bn</td>
<td>74.7</td>
<td>69.1</td>
<td>5.6</td>
</tr>
<tr>
<td>Jobs</td>
<td>240,000</td>
<td>220,500</td>
<td>19,500</td>
</tr>
<tr>
<td>Remuneration R’bn</td>
<td>32</td>
<td>29.9</td>
<td>2.1</td>
</tr>
<tr>
<td>Taxes Paid R’bn</td>
<td>21.8</td>
<td>20.2</td>
<td>1.6</td>
</tr>
</tbody>
</table>

DEDAT interventions are aimed at facilitating the high-growth outcome in collaboration with all agencies in the port logistics chain.
4.1 Cape Town Container Logistics Dashboard Overview
4.2 Cape Town Container Logistics Dashboard Stack Analysis
4.3 Cape Town Container Logistics Dashboard Container Moves

- **Moves across the Quay and General stack % by Month**
  - Shows the trend of moves across the quay and general stack percentage over months.

- **Moves across the Quay and Avg Days at Berth by Month**
  - Includes a line graph showing moves across the quay and average days at berth by month.

- **TEU moves, Trucks, Rail and General stack by Week**
  - Graph showing TEU moves, trucks, rail, and general stack by week.

- **Truck Moves, Duncan Road Median Minutes and Container Terminal Median Minutes**
  - Graph comparing truck moves, Duncan road median minutes, and container terminal median minutes.

- **Date**
6. Proposed Way Forward

1. Consolidate the cluster. Intensify collaboration with TRANSNET/other stakeholders to synchronize and extend the logistics chain as a platform for further development.

2. Improve planning coordination between cold stores, container terminals, shipping lines and transporters - Dashboard.

3. Agree upon and jointly pursue appropriate performance targets, including operational availability of HLE, with the required resources.

4. Investigate suitable opportunities for private sector participation in the port logistics chain.

5. Collaboratively make the best-case scenario happen, with 26% export and cargo growth by 2026; and 20,000 new jobs.

6. Replicate the Cluster.
Thank you!