

# Planning fruit exports in a challenging logistics environment

31 May 2024



## Exporters

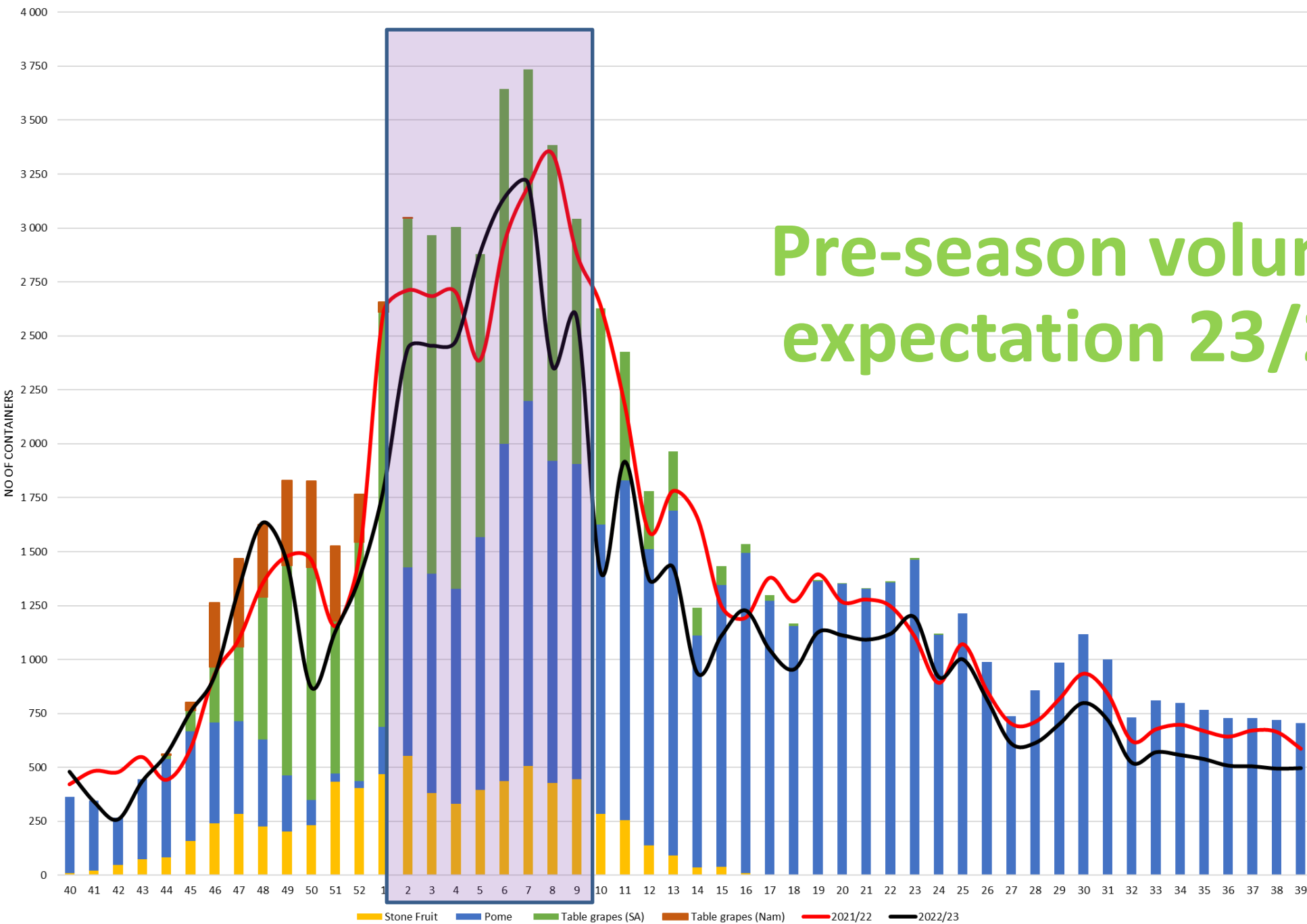
- All fruit types
- Vegetables
- Full year

## Producer organizations

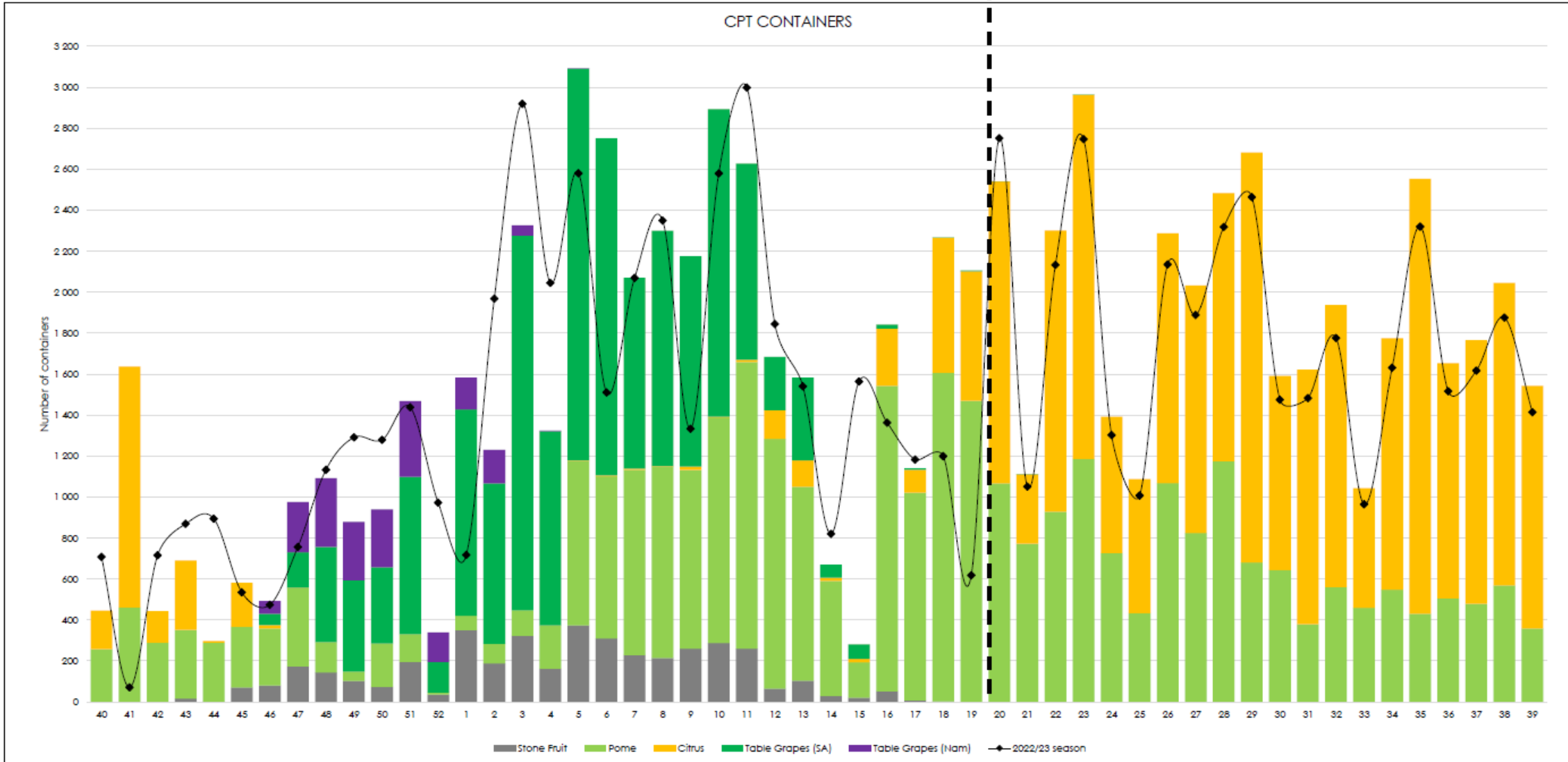


## Deciduous grouping

# Pre-season volume expectation 23/24



# Cape Town export volume 23/24



# Impact: 2023/2024 Deciduous Season

Port	22/23 (FFE)	23/24 (FFE)
CPT	40 288	38 410
CPT bulk	1 500	4 000
DUR	5 707	6 814
PE	2 538	4 703
Walvis Bay		628
Total	50 033	54 555



Terminal	22/23	23/24
CTCT	36 764	32 737
CTMPT	3 524	5 673



Short planning horizon



1/3 of total table grape production volumes exported via alternative ports.



Pressure on truck, empty equipment and genset capacity. Delays occurring at all nodes in the supply chain



Unpredictability and delays adds additional cost within an extremely competitive supply chain



Daily, challenging short-term decision making

# Planning vs Actual

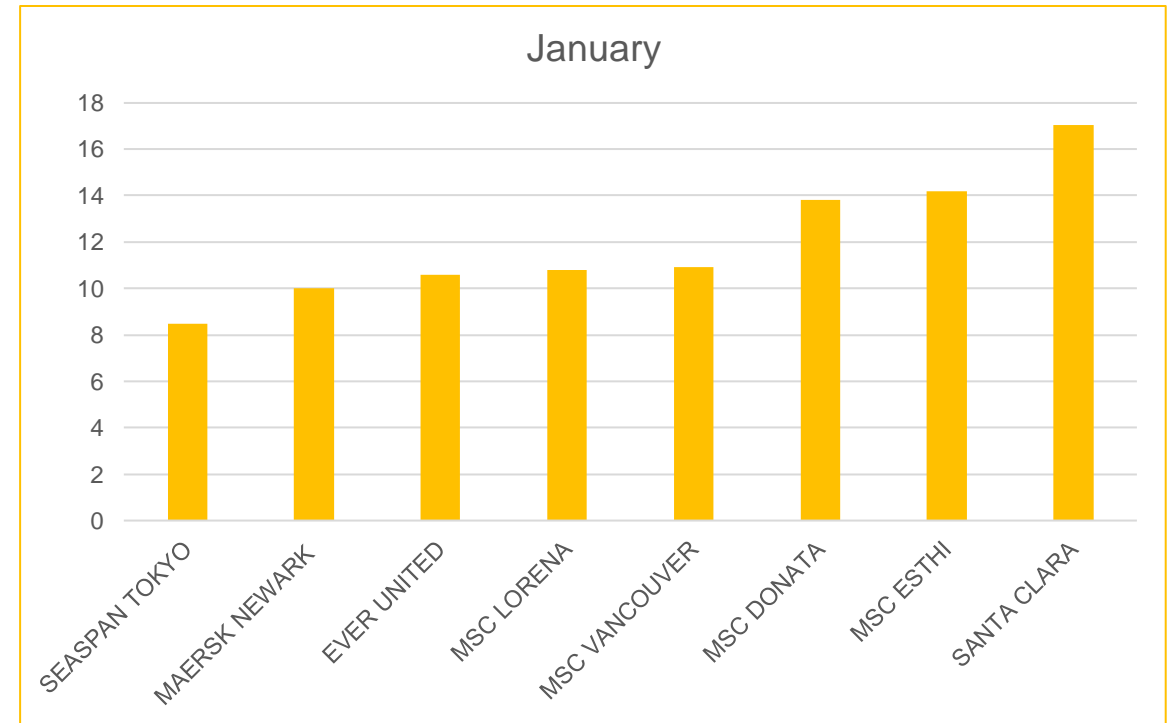
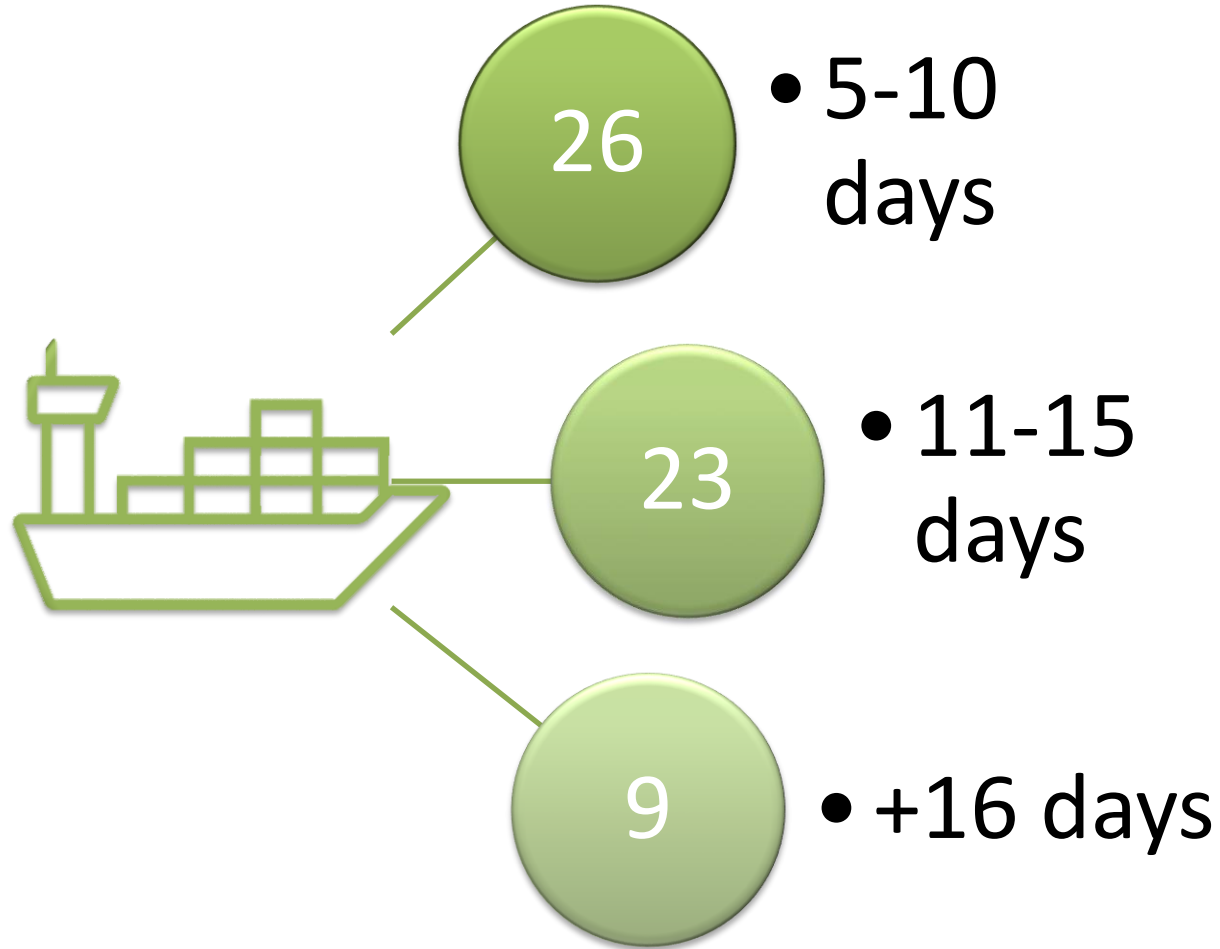
Pre-Season	Post Season
Bulk vessels every 2 weeks (targeting 5 vessels)	Weekly or twice a week (13 loaded)
Feeders via MPT	MPT crane breakdowns / FPT reaching capacity
MPT plug expansion plans	Plugs will arrive after the deciduous season
PE callers – not committed	Diversions in the new year – exceeded expectation
Walvis caller omit CPT	Walvis vessels called cape town as well.
7 RTG's deployed before Christmas	7 RTG's deployed in February
Windy FEB in 2023	Windy Dec and Jan but less wind in Feb



VS



# CTCT fruit days in the port



# Key take aways and lessons learnt

- Wind and volume patterns will determine PE calls
- Pressure on trucking capacity when servicing 2 ports
- Empty reefer availability in Port Elizabeth – tautliners and cold trucks supplementing reefer fleet
- Empty reefer availability in Cape town – impacted local loading and PE inducements
- Durban delays impacted Cape Town – different deployment patterns / adjusted coverage
- Bulk vessel availability
- Walvis Bay calls will continue next season

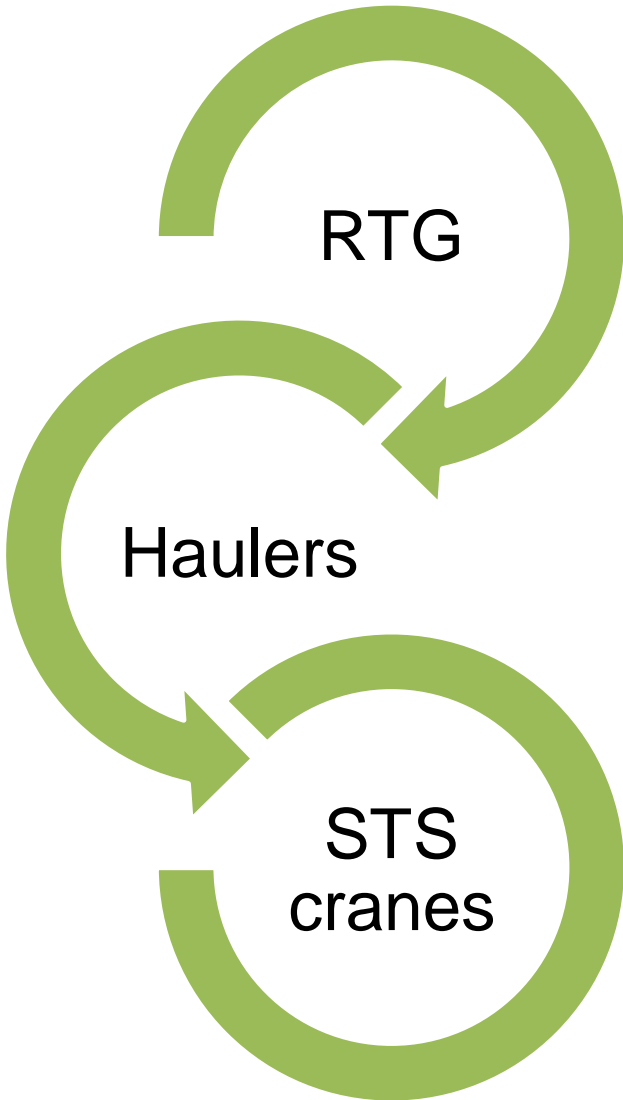
## Goal

- Get the fruit out of the country
- Spend as little time as possible on the quay
- Regular arrivals at destination
- Manage cost through visibility





# Cape Town equipment update



Increased from 15 to 28 available Rubber Tyre Gantries.



New haulers will be delivered June 24

Mid-life refurbishment should have started in 2022 but postponed. Liebherr technicians (2) on site, cranes have been assessed and parts have been ordered



# What has changed?

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## Positive developments

- Acting Transnet leadership – Adv Michelle Phillips appointed
- New terminal management /regional management
- Deployment of the 4<sup>th</sup> shift (125 new staff members)
- Navis trainers 8 weeks onsite
- Order placed for New RTG's (6 Dec 2023)
  - Higher wind speeds
  - 5 high in line with terminal capacity increase
- New hauler combos arriving July 2024
- Permanent truck staging area in design phase
- Progress on recommendations made by the World Bank consultants

We do not yet see significant increase in performance .....yet

# War room

- Decision makers around the table
- Daily in challenging time now once a week till May
- Shipping lines, Industry players, Exporters
- Quick decision making, practical ideas
- Look across services and terminals
- Next step Value stream mapping



# Value chain mapping



- Understand the end-to-end value stream
- Establish a windbound recovery process that covers internal and external needs
- Improve communication through understanding

# What can we expect next season?

- Equipment will be a year older
- Likely Eastern Cape Ports will be used again
- Walvis Bay volumes will grow
- 4<sup>th</sup> shift (2x12 hour shifts) gaining experience
- Rail will not be ready for the next season
- Two seasons before new equipment arrives

## Longer term plans

- Moving minerals to Saldanha
- Increase CTCT and CTMPT plug capacity
- Elections – 29 May
  - Impact on SOE with multi-party governments
  - New Minister of Transport (replacing SOE)
- Effectiveness of the new transport regulator
- Liner competition and service coverage
- Red sea impact on empty Reefer supply

NO	RTG's Category
7	Los Angeles
15	Original
7	Engine refurbish



# Public Sector Participation (PSP)



## Port of Cape Town Stakeholder Dialogue

- February 2024 both Adv Michelle Phillips and Chair of the Transnet board Andile Sangqu stated that Transnet is open to PSP
- Why is Cape Town terminals not on the PSP list?
- Durban Pier 2 is a trail run, learning from the experience



## Department of Transport

- PSP project team housed under the Department of Transport
- The project team called for proposals that was submitted through AGBIZ



transport

Department:  
Transport  
REPUBLIC OF SOUTH AFRICA

# PSP examples

- Cape Town Liquid bulk tender to market
- Durban Liquid bulk terminal tender awarded
- Culemborg RFI evaluation
- A-berth container berth
  - Short tender period not conducive to investment
- Collaborations with Shipping lines and industry
  - RTG's from Los Angeles
  - Experienced terminal planning assistance



# Cape Town Strategic projects



①

**Expansion of Cape Town Container Terminal - Phase 2b**

②

**Truck Staging Project**

③

**Back of Port Logistics Park-Culemborg**



# Cape Winelands Airport

## Traffic Forecast

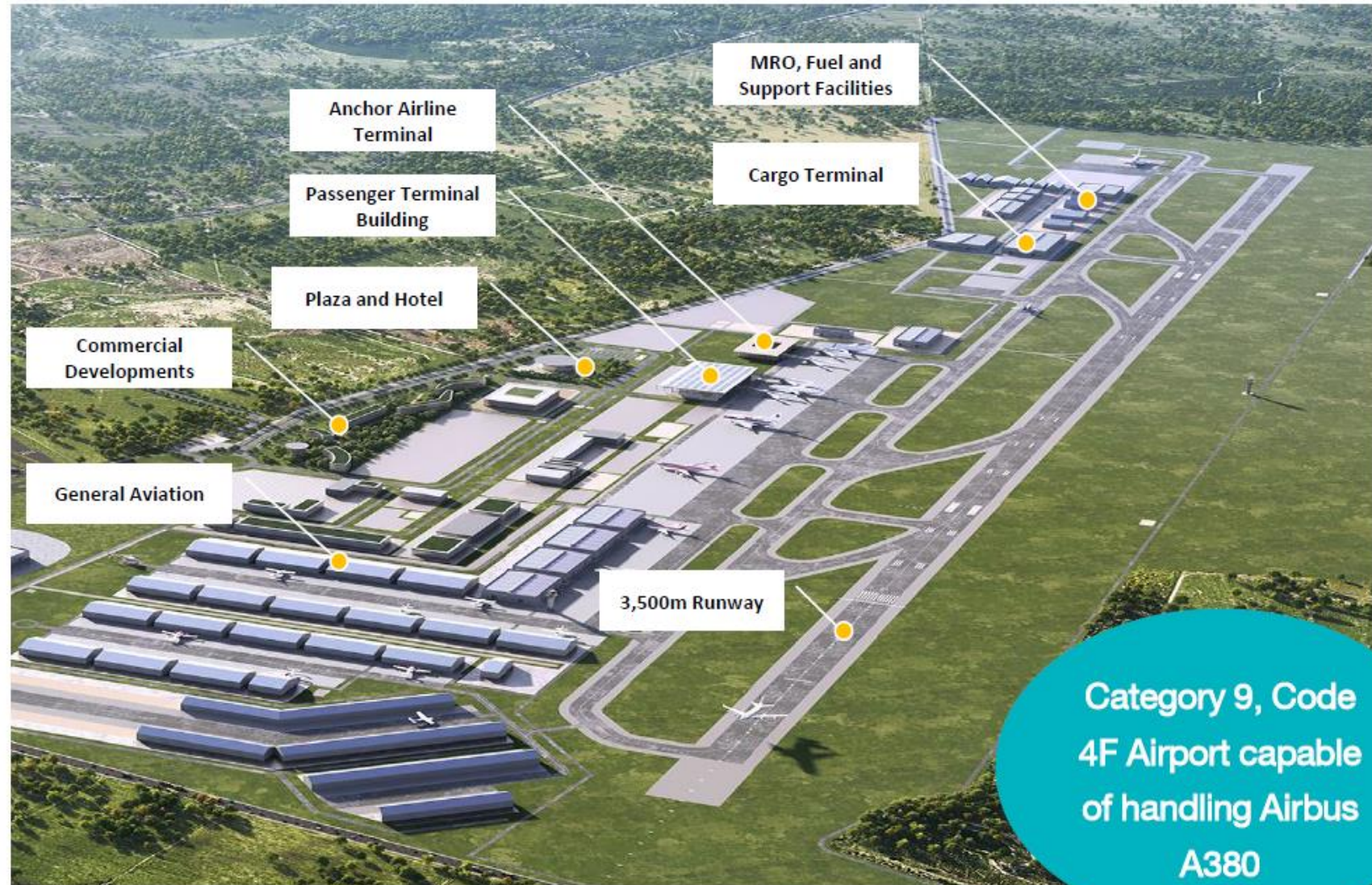
- 2,0 MPPA by 2030
- 3,8 MPPA by 2040
- 5,2 MPPA by 2050

## Air Services

- General Aviation
- Scheduled Commercial Services
  - Domestic
  - International
- Diversion Services

## Support Services

- Digital Air Traffic Control
- Cat 9 ARFF
- Ground Handling
- Fuel Facilities



Category 9, Code  
4F Airport capable  
of handling Airbus  
A380

# Cape Winelands Airport

- Improved access to market
- Investment into facilities & infrastructure
- Dedicated cargo terminal
- Facilities across the value chain, incl cold storage & warehousing
- Private Sector opportunity to discuss business models for joint value creation
- Intermodal connectivity
- Long term: rail potential

**PLANNED OPENING  
MID 2027**



# Thank you

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Presentation by Antoinette van Heerden on behalf of  
the  
Fresh Produce Exporters' Forum

+27 83 790 6603

[Antoinette@fpéf.co.za](mailto:Antoinette@fpéf.co.za)

[www.fpéf.co.za](http://www.fpéf.co.za)