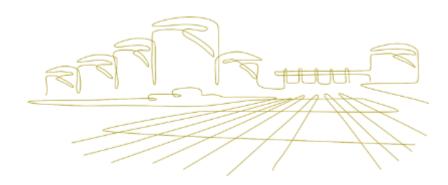




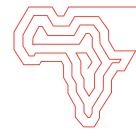
Transnet National Ports Authority

Adv Phyllis Difeto

Managing Executive, TNPA



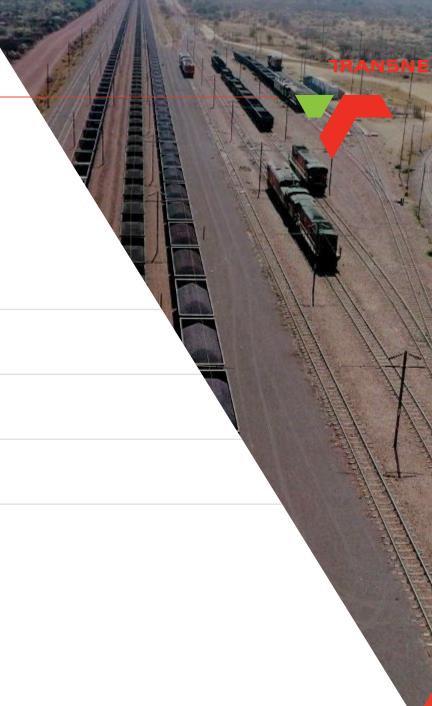
Contents



TNPA Port of Cape Town: WC Logistics Cluster 2023

01 Port Overview02 Port Layout & Terminal Capacity03 Port of Cape Town 8-Point Plan

04 Conclusion



1. PORT OVERVIEW



CAPE TOWN—BUSINESS PARAMETERS

R15.8 bn Total assets Total Port Area 9350ha Land Area 620ha **Sustainable World Class** Water Area 8730ha **Smart People's Port of** choice Distance around the port is 20km 42 Berths 3 Ship Repair Facilities Marine fleet (4 tugs, 2 pilot boats, 2 launches & 2 work boats) **A Premium Fruit 11 Licensed Terminal Operators Export and Agriculture** (1 Container, 2 MPT, 6 Liquid Hub bulk, 1 Cruise & 1 Breakbulk) Port Users (20 Bunkering, 13

Stevedoring, 12 Waste disposal, 7 diving Licences & 55 Vessel Agents

registration, 2 Hull cleaning permits)

CAPE TOWN- PORT ACTIVITIES

Freight Traffic

Containers

Deepsea import, export and transhipment and coastwise containers

Liquid Bulk

Import and export of petroleum products
Other liquid bulk commodities including edible oils

Dry Bulk

Import of agricultural products, grain, fertilizer

Break Bulk

Imports of cement and steel Export fruit, steel and fish transshipments

Other Services

Licenced Operators

Offering stevedoring, bunkering, waste disposal, diving and hull cleaning services

Fishing

Resident trawlers & fish processing plants

Maritime Engineering

2 Dry dock facilities

1 Syncrolift – elevated platform facility with 5 lanes, maximum lifting capacity of 1750 tons, caters primarily for repairs of fishing trawlers up to 64 m length

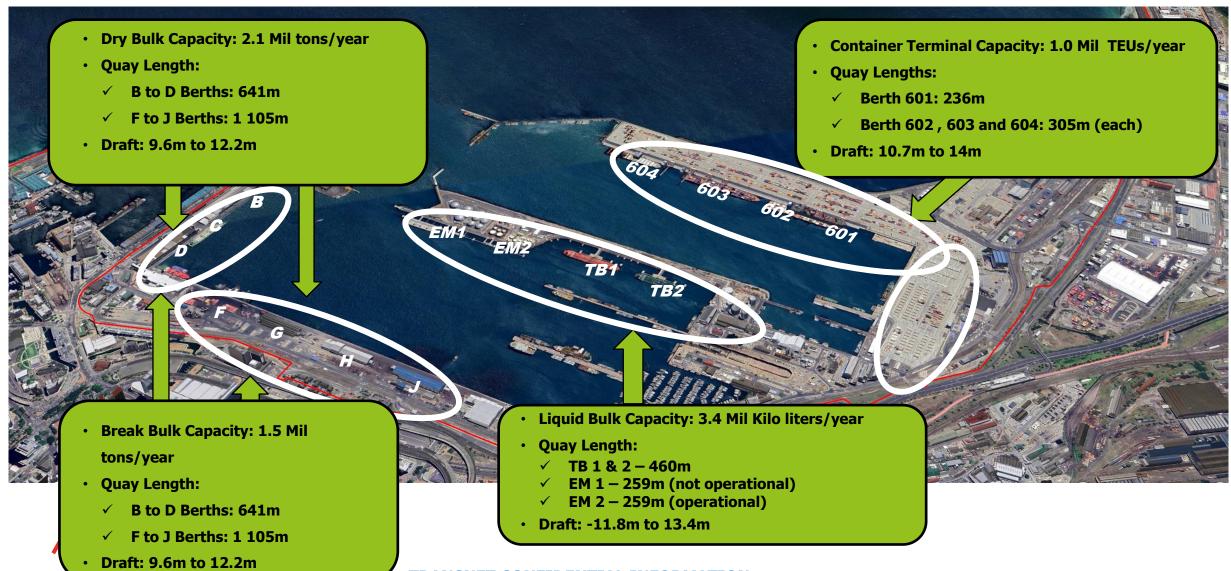
Tourism and Recreational

Dedicated cruise terminal
Yacht Club for recreational boating
activities

Close proximity to V&A Waterfront

2. PORT OF CAPE TOWN LAYOUT & TERMINAL CAPACITY





TNPA, 09/10/23

TRANSNET CONFIDENTIAL INFORMATION





Focus Areas	Initiatives / Strategic Projects	Status
	1. Continued use of A Berth for Cargo Operations.	In-Progress
Optimize the Port as a Delivery Platform	2. Development of Back of Port facilities (PIP Site & Culemborg) to address port congestion.	In-progress
	1. Long Wave — Shore Tension (1 x set active). Secured 16 additional units for the port.	Complete/Ongoing
2	2. High Swell – Helicopter for Pilot Deployment in 2023/24.	In-progress
Combat Adverse Weather Conditions	3. Wind – MOU Concluded with CSIR to investigate predictive model, potential infrastructure engineering solution/s, equipment which are more resilient to wind, and optimal recovery plan.	In-progress
	4. Fog — Investigate impact on Marine & Cargo Operations and explore possible mitigation.	In-progress



Focus Areas	Initiatives / Strategic Projects	Status
	1. Interim Truck Staging Facility operational from June 2022. Maintenance Contract concluded to maintain the facility.	Ongoing/Completed
3	2. Reduce truck terminal inflow during peaks ahead of stack closure, through introduction of additional Interim Truck Staging Areas.	In-progress
Improve Truck Operations	3. Increase Port utilisation on 24/7 basis ("night runs").	Ongoing/Completed
	4. Support the enhancement of the Truck Booking System (TPT - NAVIS) and integration thereof with TNPA perimeter access control.	Ongoing/Completed
	5. Implement Resolution from Truck industry workshop held in August 2023	In-Progress
	6. Smart Traffic Management through enhanced Infrastructure, Systems and Operations.	Ongoing/Completed
4	1. Implement a 3x Tugs and 3x Berthing Gang operation.	Ongoing/Completed
Optimise Marine Services	2. Monitor Marine Operations Performance Standards (MOPS) to minimise vessel service delays.	Ongoing/Completed
	3. Marine Fleet Upgrade (2 x Workboats by 2025 & 2 x Launches by 2024).	In-progress





Focus Areas	Initiatives / Strategic Projects	Status
5	1. Weekly Stakeholder Engagement Meeting.	Ongoing
	2. Quarterly Stakeholder Workshop.	Ongoing
Improve Information Sharing & Port Operations Visibility	3. SMS / Email Notifications regarding weather, berth planning & shipping.	Ongoing
	4. TNPA Dashboard Reports per shift.	Ongoing
	5. Host Daily Berth Planning Meetings	Ongoing
	6. National "Daily OPS Meeting" with customers.	Ongoing
6	1. Create additional container capacity (CTCT Phase 2b – increase capacity from 1m to 1.4m TEUs):	
Terminal Equipment & Port Infrastructure	 a) Increase Container Stack Capacity (TPT). b) Increase capacity of rail marshalling yard (from 40 to 50 wagon trains). c) Create a permanent Truck Staging Facility. 	In-progress





Focus Areas	Initiatives / Strategic Projects	Status
6 Terminal Equipment & Port	2. Monitor the implementation of the Terminal Operators capital investment, maintenance, and refurbishment plans (Transnet Port Terminals (TPT) and Fruit Produce Terminal (FPT), and other terminals).	Ongoing
Infrastructure	3. F-Berth Refurbishment.	Completed
	4. J-berth Refurbishment	In-Progress
7	1. Develop a pipeline line for critical skills (Marine & Engineering services).	Ongoing
People	2. Fill critical vacancies in port operations.	Ongoing
	3. Implement TNPA Incentive Scheme.	Completed
	4. Drive a culture of service excellence & customer centricity.	Ongoing





Focus Areas	Initiatives / Strategic Projects	Status
	1. Integrated Port Management System (IPMS) for Port control - to plan, book and monitor vessel movements, for usage by vessel agents and shipping lines.	Completed
8	2. Detailed monitoring of vessels at anchorage.	Ongoing
Immediate Crisis Management	3. Detailed investigation into container vessels bypassing the port.	Ongoing
	4. Host TNPA Integrated Operations Alignment Meeting ahead of each shift.	Ongoing
	5. Monitor TPT Performance Improvement Plan (CTCT).	Ongoing

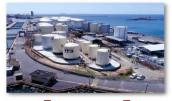
4. CONCLUSION



Port strategy enablement of growth in key commodities will position the PoCT as:



a Global Premium Fruit and Agriculture Export Hub.



a diversified Energy hub for the Western Cape complementing the Port of Saldanha.



a Container Terminal for the Western Cape. a multi commodity mix (MPT) port specializing in handling of dry bulk and break bulk.



a leading boat building and Ship Repair hub for Sub Saharan Africa.



a "SMART People's Port" focusing on cruise, real estate development, recreational and tourism

TNPA, 09/10/23



Transnet Port Terminals

Mr Jabu Mdaki

Chief Executive, TPT

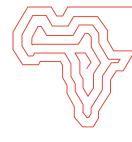
&

Ms Andiswa Dlanga

Managing Executive - Western Cape Terminals, TPT



Contents



Information relating to Cape Town Container Terminal

01 Waiting for Berth and Berth Occupancy

02 Average Volumes per month

03 Truck Turnaround Time

04 Average Vessel Turnaround Time (TPT)

05 Average Anchorage Time

06 Container Dwell Times

07 Project Timelines





OVERVIEW OF RESPONSES



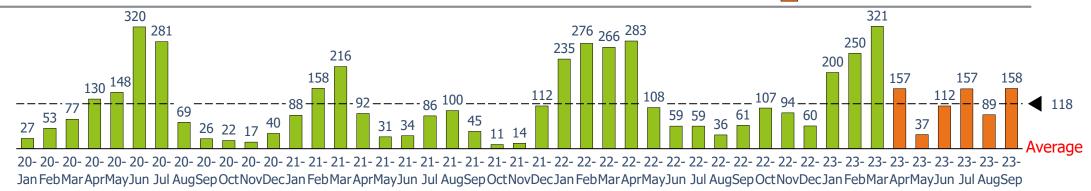
NO.	QUESTION POSED	HOW THE QUESTION WAS ADDRESSED
1.	What was the average waiting time for berth utilisation and occupancy for container ships for that month and what was the target for that month	Slide included reflecting:Average waiting time for berth andBerth Occupancy
2.	What was the average number of Twenty-foot Equivalent Unit (TEU) containers (a) loaded and (b) unloaded for that month and what was the target for that month	 Slide included reflecting: Average Volumes per month split between imports, exports and transhipments, including monthly target
3.	What was the average waiting time for trucks being (a) loaded and (b) unloaded at the Port for that month and what was the target for that month	Slide included reflecting:Average Truck Turnaround Time, including target
4.	What was the average ship turnaround time for that month and what was the target for that month	 Slide included reflecting: Average Vessel Turnaround Time (TPT), including target
5.	What was the average anchorage waiting time for the month and what was the target for that month	Slide included reflecting: • Average Anchorage Time
6.	What was the average container dwell time for that month and what was the target for that month?	 Slide included reflecting: Container Dwell Times split between imports, exports and transhipments, including target

1. WAITING FOR BERTH AND BERTH OCCUPANCY

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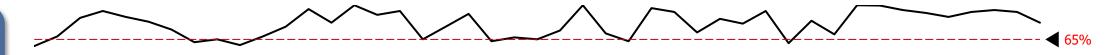
Unaudited Numbers

Average
Waiting Time
for Berth
(Hrs.)



Average waiting time for a Berth is impacted by the demand for container service versus the capacity of the terminal. This is also impacted by the productivity of the terminal operator (vessel turnaround time), the Marine Service levels by the National Ports Authority (time waiting for tugs and pilot boat to usher vessel to and from the berth) and the inclement weather. The waiting time reflects a downward (positive) trend for the last 6 months when compared to the last quarter of the 2022/23 financial year (i.e. April – Mar 2023). However, it reflects an increase compared to the same period in the prior year. This is as a result of Equipment breakdowns, which has impacted on equipment reliability / availability. TPT will be taking delivery of 7 x 2nd hand RTGs in December. CTCT are also in the process of rebuilding 5 RTGs, which are expected to be introduced by December 2023 to supplement the equipment availability.

Berth Occupancy (%)



Target

Berth Occupancy refers to the % of time that a vessel is alongside a berth. The target of 65% is an optimum number that balances adequate utilisation of the berth but avoids congestion due to high berth occupancy. This instance, Berth occupancy is higher than optimum, which is indicative of congestion, which will adversely impact the waiting time by vessels.

*All information for period the April 2023 to September 2023 is unaudited as this stage and is highlighted in **Orange** in the presentation. We have included this information to indicate the latest performance measures of TPT in order to avoid presenting outdated data. Despite being unaudited, the highlighted information still offers an insight into the present performance of TPT.

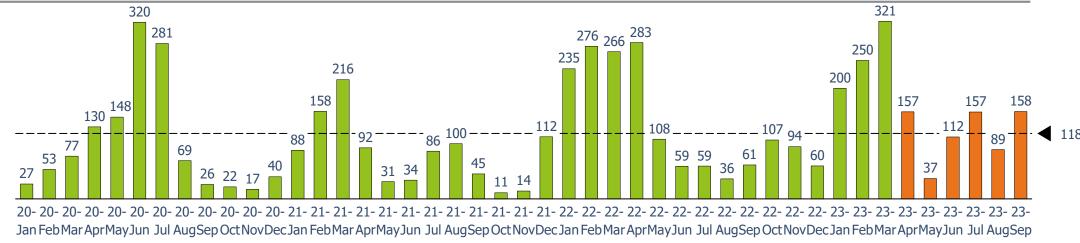
1. WAITING FOR BERTH EXCLUDING WEATHER

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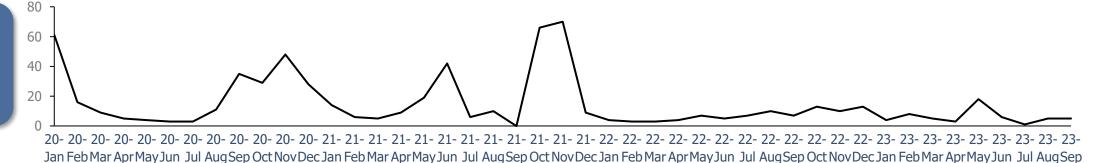


Unaudited Numbers

Average
Waiting Time
for Berth
(Hrs.)



Weather % contribution



Weather delays impact the berthing of vessels. For January 2020 weather contributed 61% to the average waiting time for berthing. Weather delays peaked in October 2021 and November 2021 at 66% and 70% respectively.

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2. AVERAGE VOLUMES PER MONTH TRANSNER Import, Export and Transshipments **Unaudited Numbers** Actual 29 24 24 24 27 26 27 **Import** '000 TEUs **Export** '000 TEUs

Transshipment '000 TEUs



Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Au

Import and Export volumes serviced on monthly basis have remained fairly stable for the past few years. Transshipment volumes have declined due to volumes lost to competition (E.g. Walvis Bay)

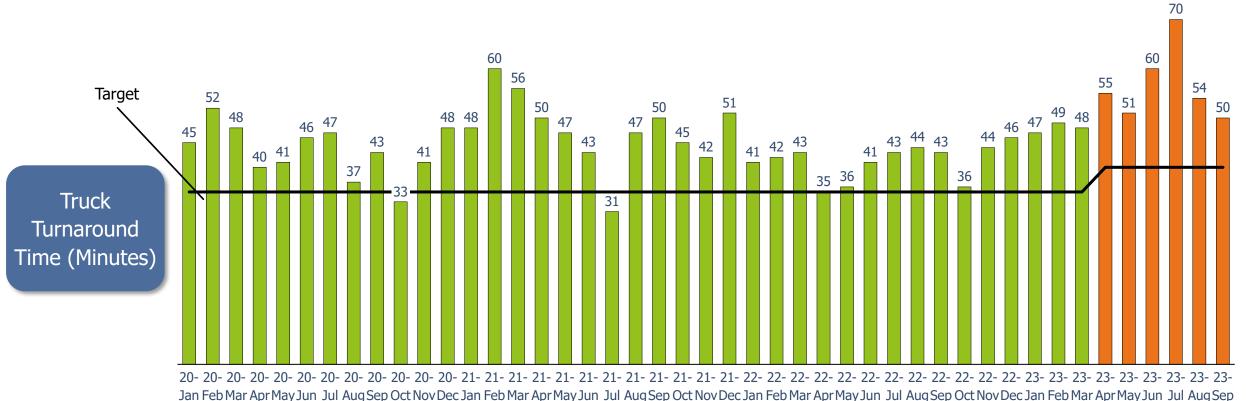
17

^{*}All information for period the April 2023 to September 2023 is unaudited as this stage and is highlighted in **Orange** in the presentation. We have included this information to indicate the latest performance measures of TPT in order to avoid presenting outdated data. Despite being unaudited, the highlighted information still offers an insight into the present performance of TPT.

3. TRUCK TURNAROUND TIME



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Truck Turnaround time is higher than target, which is indicative of roadside congestion. Impacted by equipment availability and reliability on the landside. The terminal has been challenged with equipment breakdowns, specifically Rubber Tyre Gantry (RTG) Cranes. RTG availability has averaged 15 in the last 3 months, compared to the prior year average of 19. TPT will be taking delivery of 7 x 2nd hand RTGs in December. CTCT are also in the process of rebuilding 5 RTGs, which are expected to be introduced by December 2023 to supplement the equipment availability.

The majority of trucks (approximately 60%) are serviced between 06:00 and 14:00. Approximately 35% are serviced between 14:00 and 22:00. The remaining 5% is serviced between 22:00 and 06:00.

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4. AVERAGE VESSEL TURNAROUND TIME (TPT)

2017/18



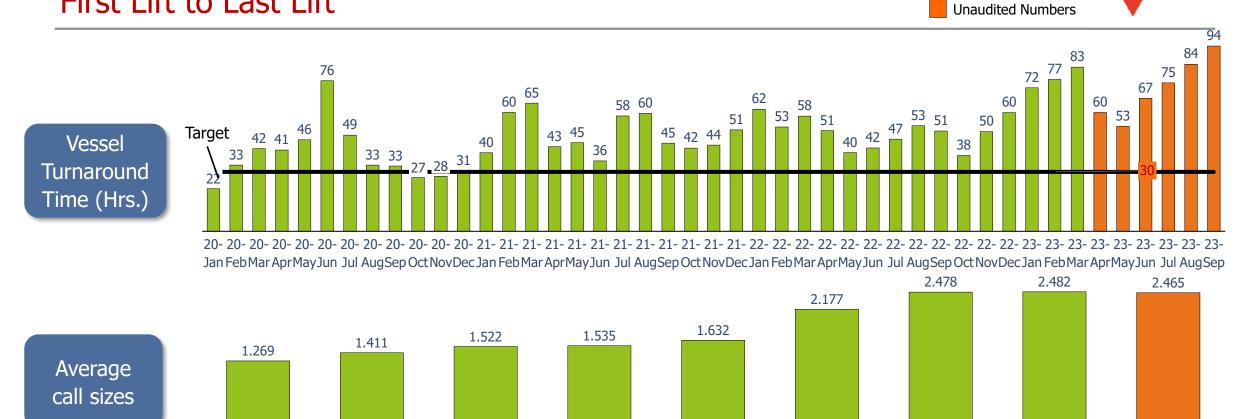
TRANSNEF

Sep YTD

First Lift to Last Lift

2015/16

2016/17



Vessel Turnaround Time is higher than target, which is indicative of waterside congestion. Impacted by equipment availability and reliability on the quayside. This is indicative of challenges experienced with equipment breakdowns, specifically Rubber Tyre Gantry (RTG) Cranes. RTG availability has averaged 15 in the last 3 months, compared to the prior year average of 19. TPT will be taking delivery of 7 x 2nd hand RTGs in December. CTCT are also in the process of rebuilding 5 RTGs, which are expected to be introduced by December 2023 to supplement the equipment availability.

*It is important to note that, while volumes have reduced by approximately 50% in the last 5 years, the number of yessel calls have reduced by approximately 50% in the same period. Therefore, the average

2019/20

2020/21

2021/22

2018/19

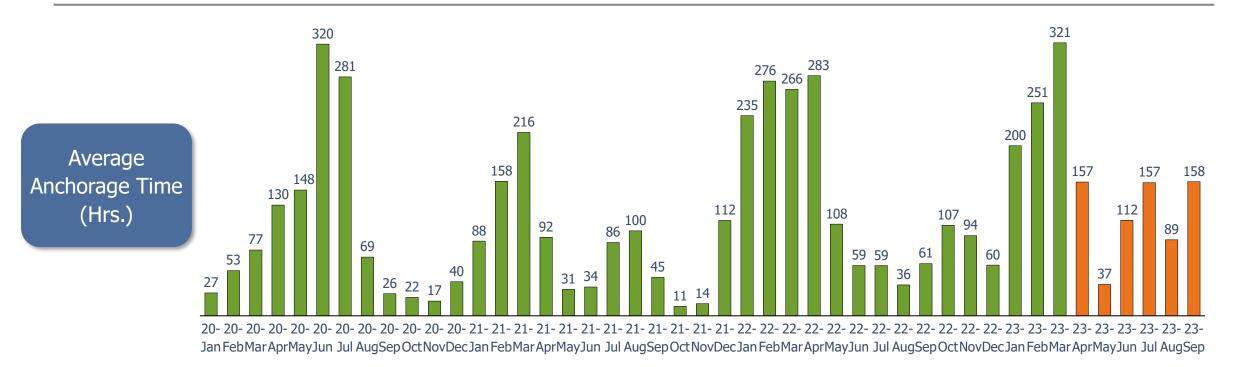
*It is important to note that, while volumes have reduced by approximately 20% in the last 5 years, the number of vessel calls have reduced by approximately 50% in the same period. Therefore, the average call size has increased significantly (by approximately 60%). Therefore, the target of 30 hours needs to be reviewed.

*All information for period the April 2023 to September 2023 is unaudited as this stage and is highlighted in **Orange** in the presentation. We have included this information to indicate the latest performance measures of TPT in order to avoid presenting outdated data. Despite being unaudited, the highlighted information still offers an insight into the present performance of TPT.

2022/23

5. AVERAGE ANCHORAGE TIME





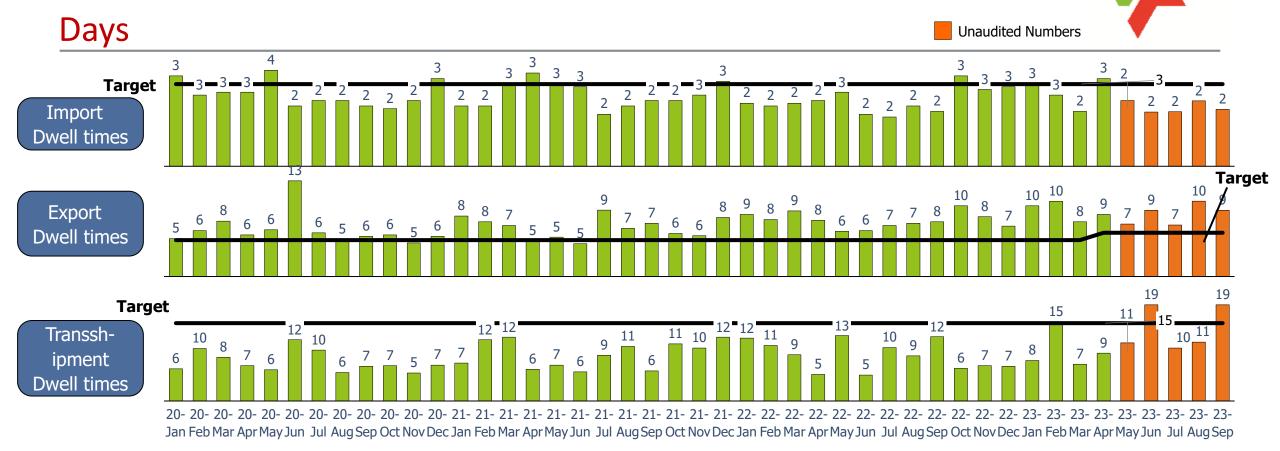
Anchorage time reflects the average time a vessel is waiting at outer anchorage. Similar to Berth waiting time, this measure is impacted the productivity of the terminal operator (vessel turnaround time) and the Marine Service levels by the National Ports Authority (time waiting for tugs and pilot boat to usher vessel to and from the berth).

The waiting time reflects a downward (positive) trend for the last 6 months when compared to the last quarter of the 2022/23 financial year (i.e. April – Mar 2023). However, it reflects an increase compare to the same period in he prior year. This is as a result of Equipment breakdowns, which has impacted on equipment reliability / availability. TPT will be taking delivery of 7 x 2nd hand RTGs in December. CTCT are also in the process of rebuilding 5 RTGs, which are expected to be introduced by December 2023 to supplement the equipment availability.

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6. CONTAINER DWELL TIMES



Dwell time reflects the average days a container is within a terminal from "time In" to Time Out". Export dwell time is typically longer than import dwell time as containers have to be on site 72 hours prior to the arrival of the vessel to facilitate planning for vessel activity.

Transshipment containers are not destined for Cape Town. Transshipment dwell time is usually longer the container will remain in the terminal from the time that it is offloaded from a "mother vessel" until such time that the "feeder vessel" arrives for loading. Furthermore, dwell time it is often used as an incentive to attract transhipments and many different terminal operators compete for the same transhipment cargo.

*All information for period the April 2023 to September 2023 is unaudited as this stage and is highlighted in **Orange** in the presentation. We have included this information to indicate the latest performance measures of TPT in order to avoid presenting outdated data. Despite being unaudited, the highlighted information still offers an insight into the present performance of TPT.

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7. PROJECT TIMELINES



Key Initiatives

PROJECT	TIMELINE
1. 9th Crane -was repositioned from Durban, to assist in redundancy during maintenance & refurbishment of cranes, starting this year	Completed
2. RTGs -Increased availability from 15 to 22 machines	22 RTG availability was achieved however due to their unreliability we are currently at 15 RTG
3. Haulers -Obtained 5 x units from Ngqura Container Terminal, still 2 short of 40 required	5 NCT Trucks and trailers were delivered however current availability is 37 Haulers
4. Mobile Crane -Transferred 1 x crane from Eastern Cape Terminal, increasing the fleet to 3.	Completed
5. Spare Parts Contracts -in place: RTGs, Haulers & Reach Stackers	Completed
 6. OEM Partnership: Contracts in place for technical support of STS cranes and the OEM of mobile crane at CT MPT is on site on a permanent basis Long terms contracts: RFP issued, expects implementation in Sep 2023 	 STS OEM Partnership contract was for months (01 Nov 2022 – 28 Feb 2023) and Mobile cranes maintenance contract in place. Done Long Term contracts awarded 01 Feb 2023
7. Shore Tensioners	On track - Done
 Two x sets were installed to mitigate excessive vessel movements 1 additional set requested from TNPA in Feb 2023 	Second set of shore Tensioners arrived - Done

Fleet Plan - 2023/24

KEY PROJECT	COMMENTARY
(1) 8 STS Refurbishment of 8 Ship to Shore Cranes	Funding approval in progress. Expected to go to market in Jan 2024
(2) Replacement of 27 Rubber Tyre Gantry (RTG) Cranes	Funding approval expected in Nov 2023. Go to market – Jan 2024



Transnet Freight Rail

Siyanda Mba

Acting Managing Executive, Cape Corridor, TFR

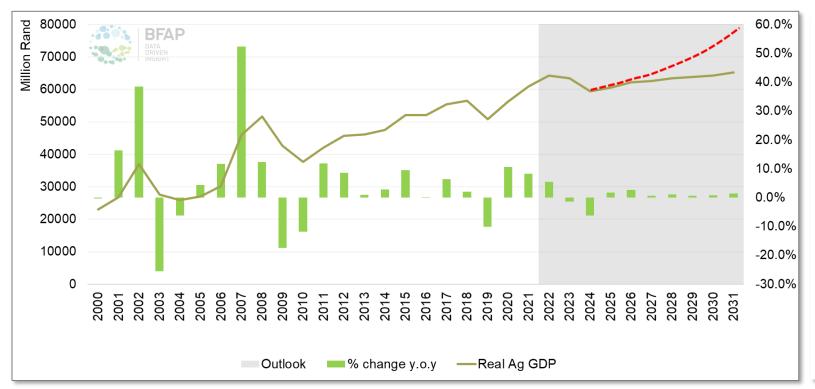


TFR VALUE PROPOSITION FOR THE AGRICULTURE INDUSTRY

A Cost Effective and Efficient Rail Service



AGRICULTURE GROWTH POTENTIAL



OBJECTIVES

- Shift volumes from road to rail
- Increase density of under-utilised lines
- Harness market opportunities
- Optimise less than train load traffic
- Improve asset utilisation and efficiency
- Risk distribution / sharing PSPs
- Contribute to growth of key agricultural sectors

Source: AGBIZ, Sept 2022



TFR VALUE PROPOSITION FOR THE WC AGRICULTURE INDUSTRY

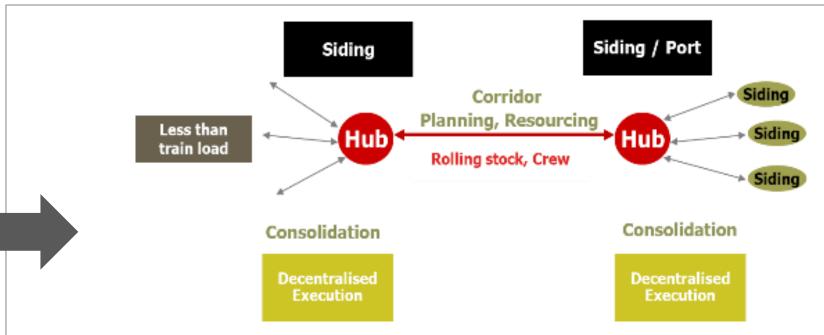
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A Cost Effective and Efficient Rail Service

CHALLENGES

- Low rail market share
- Need for containerised/ palletised & intermodal solutions to ship timesensitive produce to target markets
- Seasonality of agricultural commodities
- Low train Utilisation
- High operational costs
- Low operations efficiencies
- Limited infrastructure investment
- Profitability of short distance traffic

OPPORTUNITIES TO GROW RAIL



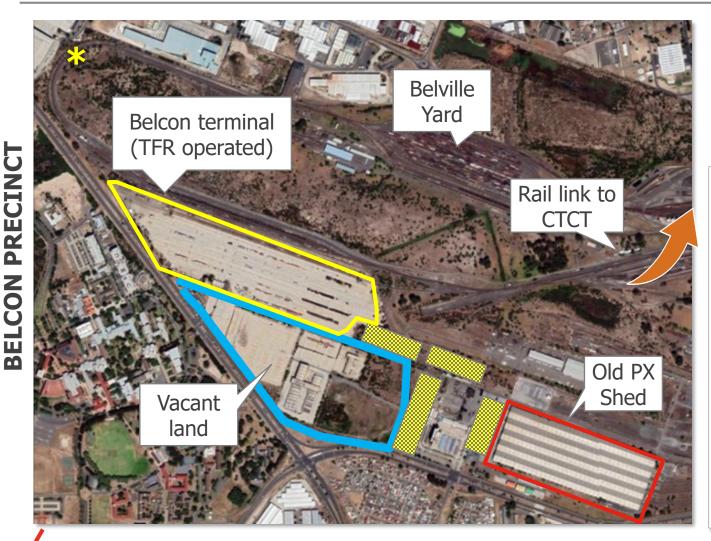
- Infrastructure access to branch lines/ consolidation hubs
- Significant improvement in operational performance
- New operation models :
 - Longer trains; Value chain integration
 - Maximum wagon payload
 - Increase train lengths

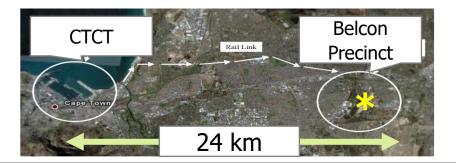
- Branchline & Siding concessions
- Locos: traction deployed, Conversion, maintenance
- Crewing methodologies between main points to improve utilisation of crew and rolling stock
- Integrated security solutions

ENTRENCHING RAIL IN THE VALUE CHAIN

TRANSNER

Belcon Precinct Value Proposition





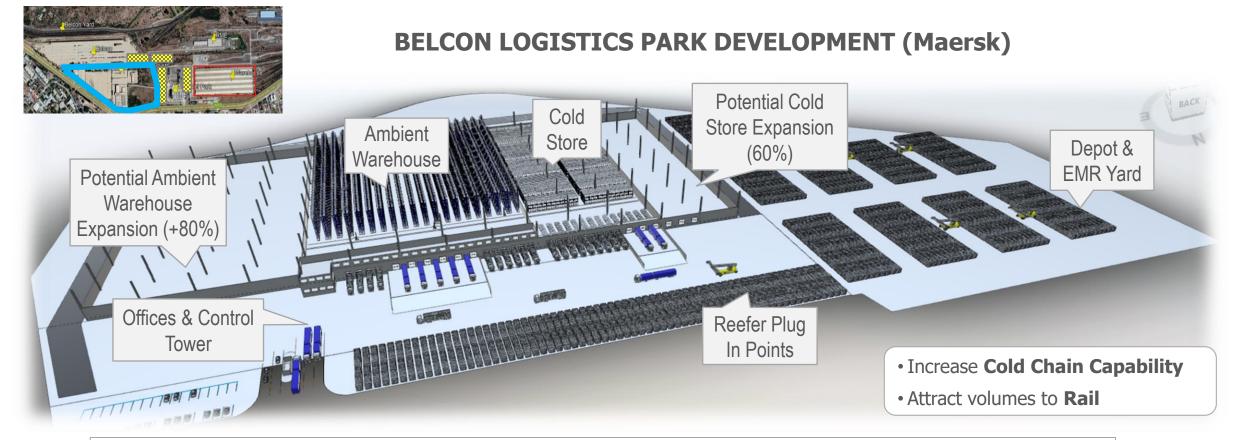
Develop vacant land at Transnet Park to enhance rail volumes on shuttle service between Belcon & the Port of Cape Town

- 160K m2 vacant land awarded to MAERSK to offer Warehousing;
 Cold storage; Reefer capacity (plug points) and Container depots.
 Phase 1 which includes the construction of wash bay and reefer towers to be completed and operational by end October 2023.
 Volume commitment of 140K TEUs pa. as from 2025/26 financial year.
- 90K m2 warehouse awarded to TITAN cargo which is in construction phase and earmarked to be operational by end 2023.
 Volume commitment of 36K TEUs pa. as from 2024/25 financial year

ENTRENCHING RAIL IN THE VALUE CHAIN







CREATING VALUE AND REDUCING COSTS THROUGH SUPPLY CHAIN INTEGRATION



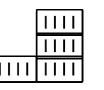
12,000 m2

Cold Store



20,000 m2

Complex fulfilment Warehouse



50,000 m²

Container depot & PTI facility

ENTRENCHING RAIL IN THE VALUE CHAIN

Belcon 'Reefer Stack' and Shuttle Overview



EXTENDING THE CTCT STACK



TERMINAL CAPACITY: 24X7 WORKING

Element	Current	24x7
# of wagons	50 wagons	
Stacking height	2X(F); 4X(E)	4X(F); 6X(E)
Ground slots	800 full; 400 empty	
Stacking (TEU)	1 600 Full	3 200 Full
Shuttle (TEU p/a)	96 000	201 600
Operations	O6:00 - 22:30 X 5 days p/w	24X7

RAIL INITIATIVES

Extend CTCT reefer stack to Belcon and increase port shuttle capacity

- Capacity for 3 reefer shuttles per day
- Plug point capacity increased from 96 to 144 to date

POTENTIAL NEW CUSTOMERS FOR REEFER TRAINS

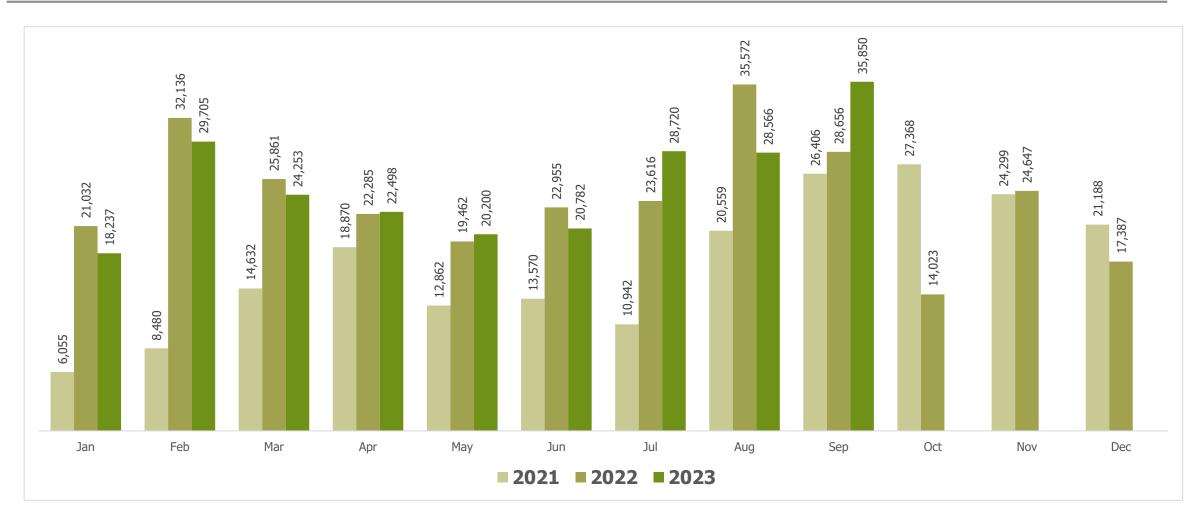
- Core Fruit
- Go Reefers
- Link Cargo
- MAERSK

28

BELCON TERMINAL

Y-o-Y Volume Performance Comparison







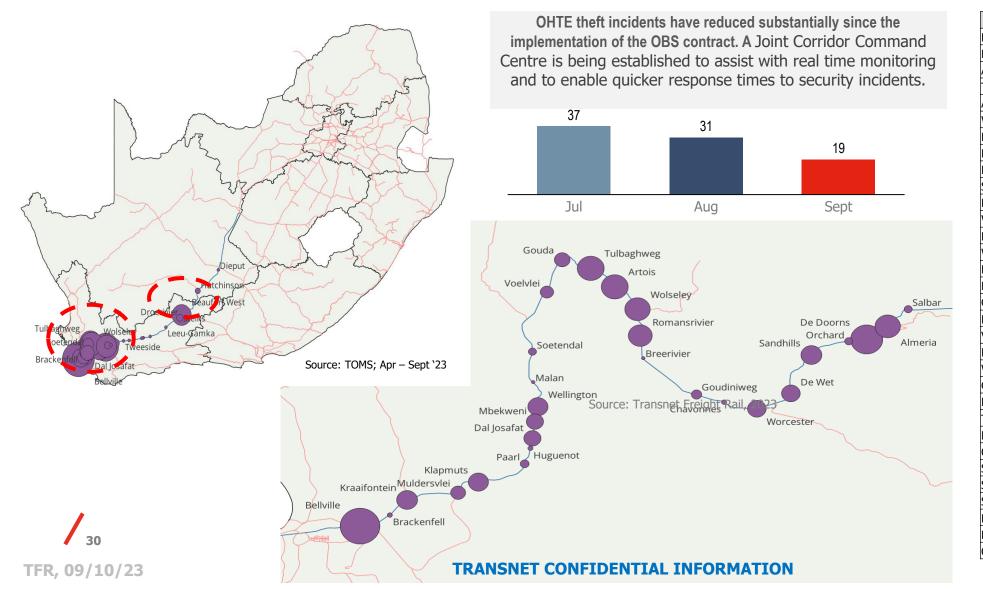
Growth represents volumes attracted from road to rail

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Challenges

Security Incidents: Cable theft; Sabotage & Vandalism, General theft





Top 95% of Incidents

10p 95% of Incidents		
New Location Description	Count	
BELLVILLE	28	
DE DOORNS	22	
ARTOIS	18	
TULBAGHWEG	18	
ALMERIA	17	
WOLSELEY	17	
BEAUFORT WEST	16	
ROMANSRIVIER	16	
KRAAIFONTEIN	14	
SANDHILLS	14	
KLAPMUTS	13	
WELLINGTON	13	
DE WET	12	
WORCESTER	12	
DAL JOSAFAT	11	
MBEKWENI	11	
GOUDA	10	
MULDERSVLEI	9	
VOELVLEI	8	
MONTE VISTA	7	
WINDERMERE	7	
GOUDINIWEG	6	
HERMON	6	
TOUWSRIVIER	6	
PAARL	5	
ORCHARD	4	
SALBAR	4	
SOETENDAL	4	
STEINS	4	
HUTCHINSON	3	
BRACKENFELL	2	
CHAVONNES	2	
	9 November 2023	

9 November 2023

Source: Transnet Freight Rail, 2023

