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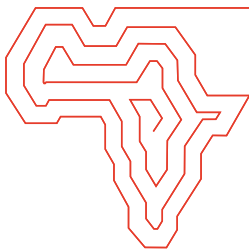
*national ports
authority*

TARIFF APPLICATION

FY 2026/27 to 2028/29

National Ports Authority

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THE AUTHORITY'S STRATEGY

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THE AUTHORITY'S STRATEGY

Core Functions And Strategic Priorities

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Marine Services

Pilotage, towage and berthing

- Marine Craft Refurbishment; and
- Fleet Acquisition.

Authority and Regulatory

Port Authority, licensing, compliance and regulatory

- Capacitation of Terminal Oversight department; and
- Benchmarking

Landlord and Infrastructure

Property portfolio and provision of port infrastructure

- Expenditure on Capex and maintenance; and
- Professional training and development.

THE AUTHORITY'S STRATEGY



Port Performance Crisis

- South African Ports ranked amongst the lowest globally (CPPI report)

Volume Decline

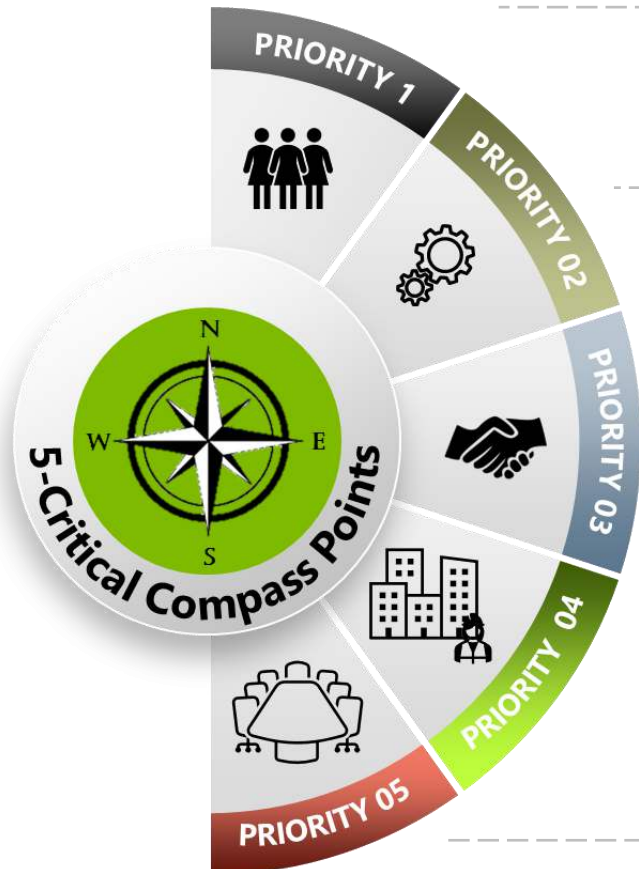
- Port volumes and vessel calls stagnated over the years

Inadequate Infrastructure

- Increase vulnerability of port infrastructure due to climate change
- Aging infrastructure limiting capacity and efficiencies

Regulatory Transformation

- New governance requirements and corporatisation mandate



1

PEOPLE – Our Greatest Treasure

- Human capital development and leadership stability

2

OPERATIONS – The Heartbeat of SA Port System

- Operational excellence and oversight strengthening

3

PSP's – Amplifying Potential Through Partnerships

- Strategic partnerships and private sector collaboration

4

INFRASTRUCTURE – Building Tomorrows Infrastructure Today

- Future-ready port infrastructure and capacity expansion

5

CORPORATISATION – Shaping TNPA's destiny

- Institutional transformation and governance enhancement

THE AUTHORITY'S STRATEGY

How The 5 Compass Points Deliver R4G

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TACTICAL

FIX AND OPTIMISE THE BUSINESS

Strategic enabler of South Africa's logistics competitiveness



PEOPLE:

Employee Well-being, Culture, Safety & fit for purpose workforce



OPERATIONS:

Integrated oversight, volume recovery & efficiency improvement



INFRASTRUCTURE:

Equipment and asset reliability

TRANSFORMATIVE

ALIGNMENT TO POLICY CHANGES

Restore operational excellence and enhance port efficiency rankings [CPPI]



CORPORATISATION:

Organizational restructuring and governance



PEOPLE:

Change management and capability building



OPERATIONS:

Enforcement of integrated port oversight

EXPANSIONARY

SUSTAINABLE FUTURE GROWTH

Position SA ports as leading logistics hubs in the Southern Africa



PSP's:

New business development through S56 & S79



INFRASTRUCTURE:

Innovative Capacity expansion and modernization



OPERATIONS:

Strengthening Oversight framework

**WHEN THE PORTS WORK,
SOUTH AFRICA THRIVES #R4G**

LEGISLATIVE PROVISIONS & OVERVIEW OF TARIFF APPLICATION FY 2026/27

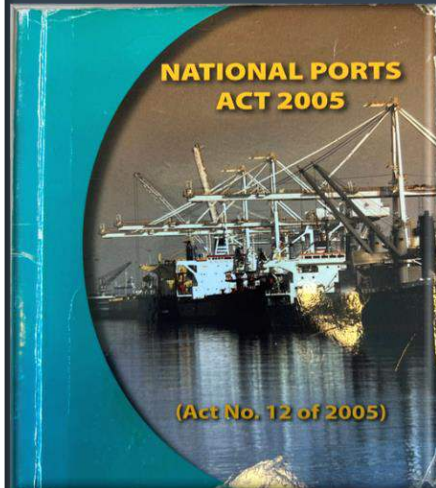
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National Ports Act 2005



❑ Section 72 (1): Tariff Application

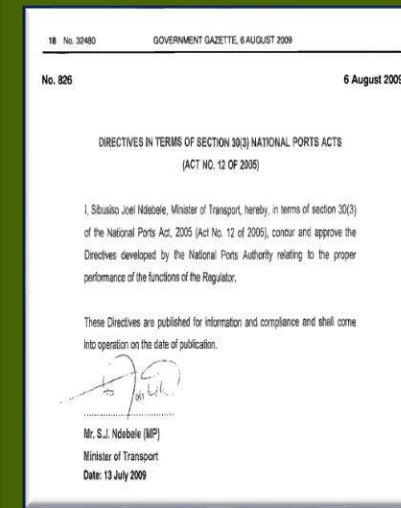
Charges for Services and Facilities Offered using approved tariffs

❑ Section 30 (2) (d): Record of Decision

Regulator to Consider and Approve Tariffs



Port Directives



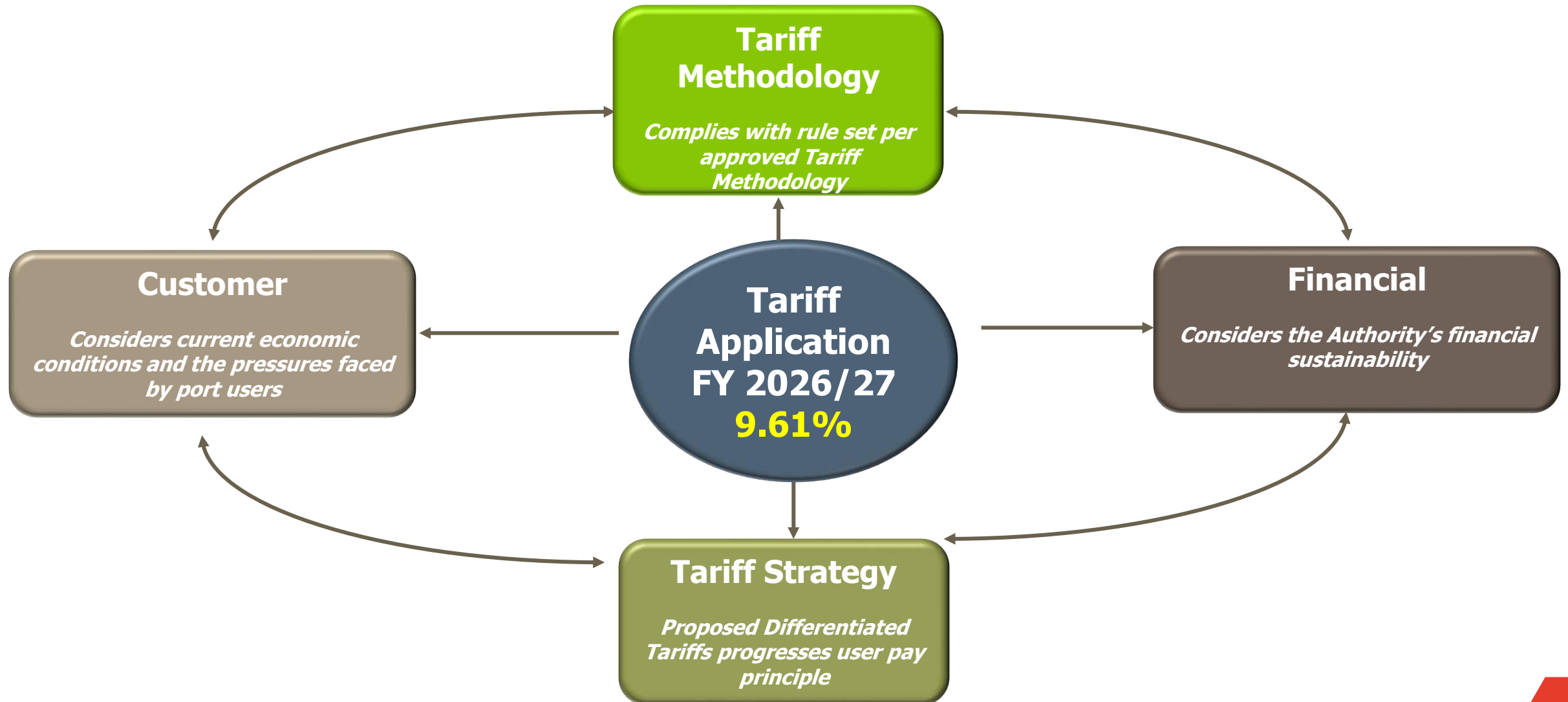
❑ **Directive 22 (1)**
Tariff Application to be submitted by 01 August

❑ **Directive 23 (1)**
Fair, Affordable, Predictable & Stable
Simple & Transparent, avoid cross subsidization, systematic Tariff Methodology

❑ **Directive 23 (2)**
Recover investment, recover costs, make a profit commensurate with the risk



OVERVIEW OF TARIFF APPLICATION FY 2026/27





PORT DEVELOPMENT FRAMEWORK PLANS



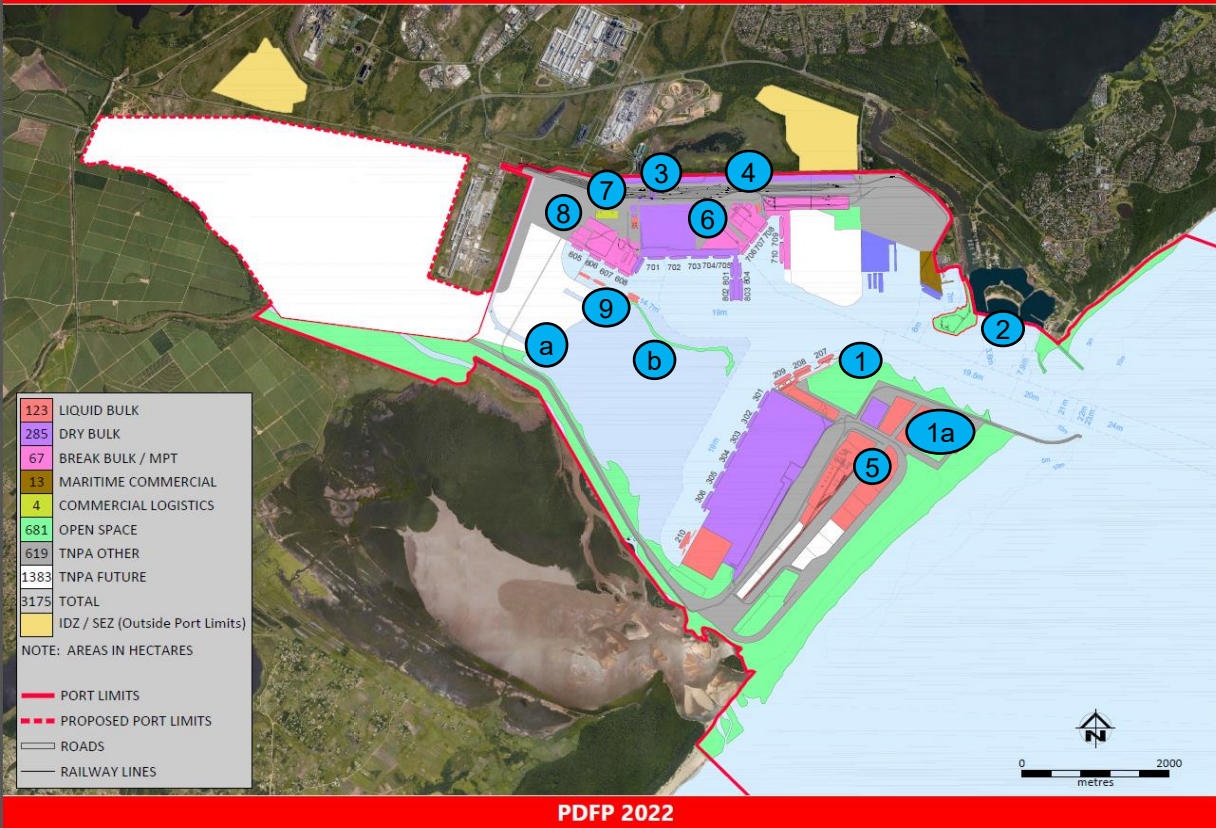
PORT DEVELOPMENT FRAMEWORK PLANS

Port of Richards Bay: Short Term (2022 – 2032)

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PORT OF RICHARDS BAY - SHORT TERM LAYOUT - 2032



Project #	Operational Date	Operational Date	Status
1	A new LNG berth and FSRU (Berth 207) becomes available	2024	!
2	Naval Island & Pelican Island for the Relocation of Navy from Durban Port	2025	!
3	Relocation site for Bulk Commodities,	2023	!
4	Bayvue railyard infrastructure upgrade and railyard expansion for 100 wagon trains.	2025	!
5	South Dunes Liquid Bulk Development, Bulk Service Infrastructure to service the Liquid Bulk Sites.	2024	!
6	Development of Mega Chrome Terminal, Bulk Service Infrastructure.	2026	!
7	Relocation of South 32 Aluminum Storage	2023	—
8	A New Container Handling Facility is Developed	2025	!
9	New LNG Powership becomes available for additional Power Generation.	2024	—



Delivered



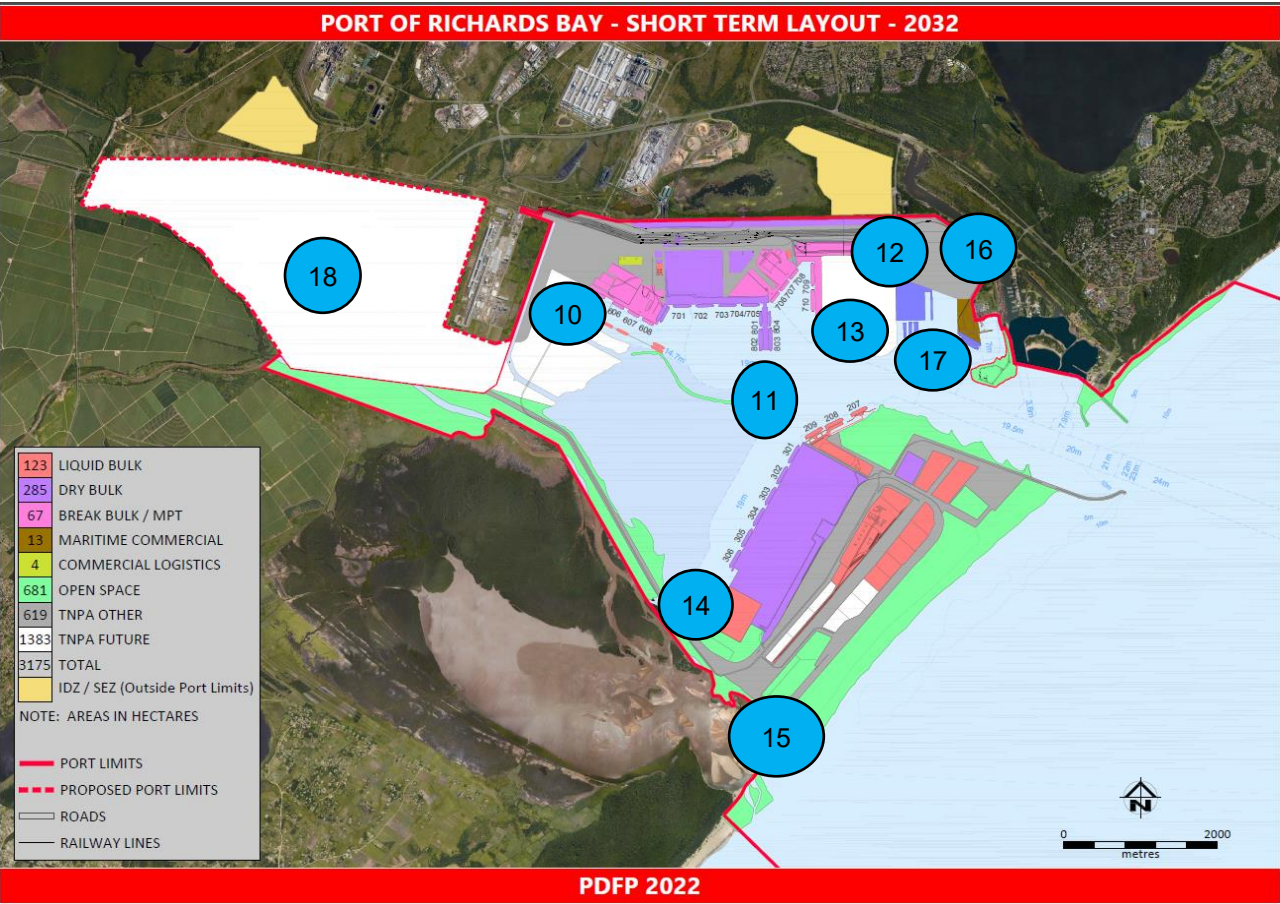
Partially Delivered/ In Progress



Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of Richards Bay: Short Term (2022 – 2032)



Project #	Operational Date	Operational Date	Status
10	A New Berth 605 becomes available for Container Handling	2024	⚠
11	Development of Mega Chrome Berths 802,803	2027	⚠
12	Extension of Ferro Slab for Additional Storage Capacity	2024	⚠
13	Two new Berths 709, 710 for Neo Bulk becomes available	2025	⚠
14	A New Liquid Bulk Berth 210 becomes available	2025	⚠
15	Environmental Offsets Sites	2022	⚠
16	New Dry Bulk Terminal Proposed	2023	⚠
17	Upgrade of Berth for the Passanger Terminal	2025	⚠
18	Acquisition of land for Future Development	2024	⚠



Delivered



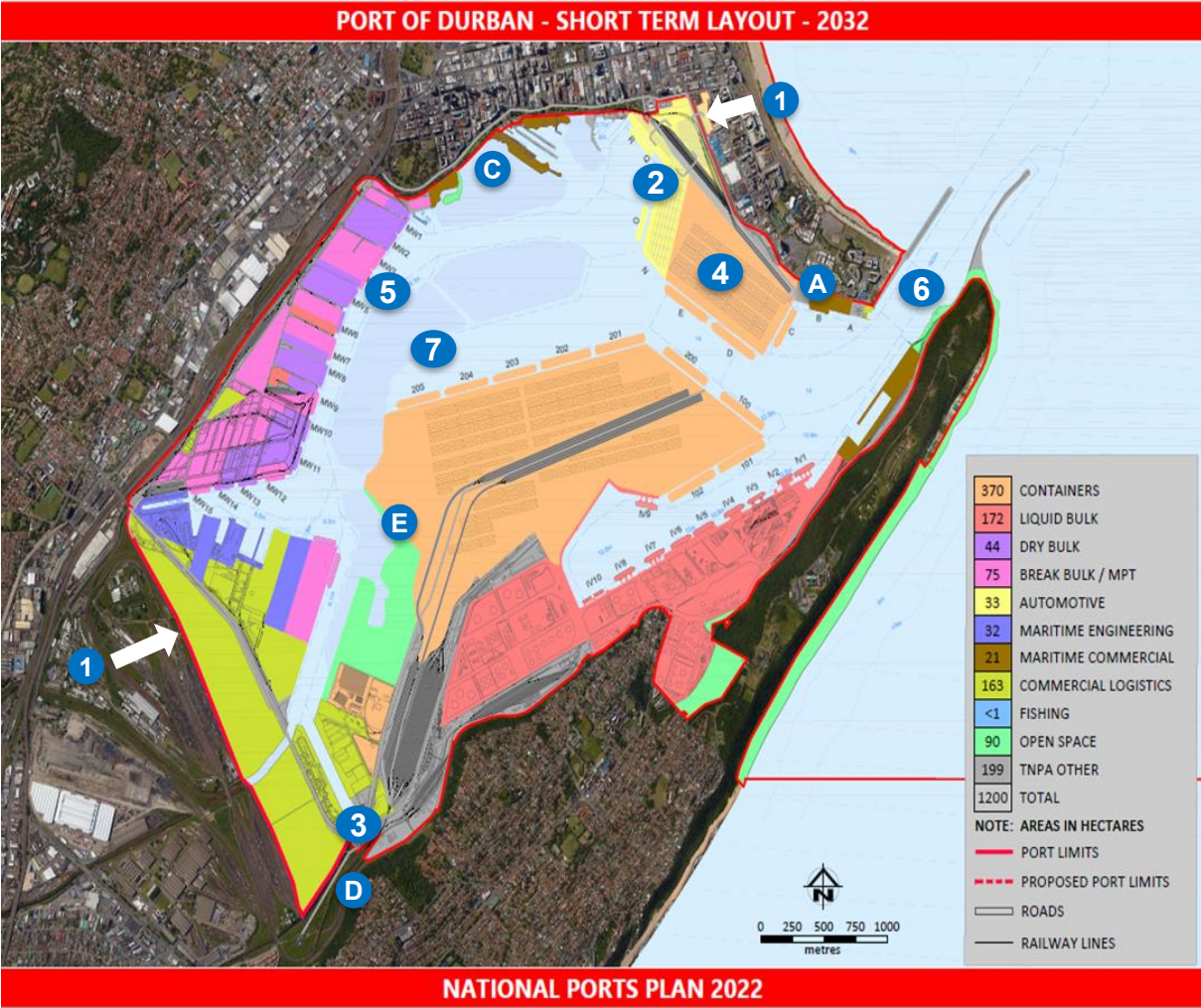
Partially Delivered/ In Progress



Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of Durban: Short Term (2022 – 2032)



Project #	Project Description	Operational Date	Status
A	New Cruise Terminal	2021	Delivered
B	TPT – DCT Pier 2 PSP	2026	Partially Delivered/ In Progress
C	Durban Marina Waterfront Development	2031	Partially Delivered/ In Progress
D	Second Access Road	2029	Partially Delivered/ In Progress
E	Container Storage for Pier 2	2028	Partially Delivered/ In Progress
1	Amendment of Port Limits to include Ex Cars for Africa and Ambrose sites	2023	Partially Delivered/ In Progress
2	Automotive Terminal Expansion	2029	Partially Delivered/ In Progress
3	Bayhead & Langeberg Roads Upgrade	2027	Partially Delivered/ In Progress
4	New Point Container Terminal	2031	Partially Delivered/ In Progress
5	Maydon Wharf Channel Deepening	2027	Partially Delivered/ In Progress
6	Entrance Channel Widening & Deepening	2032	Partially Delivered/ In Progress
7	Pier 2 Berths 203 -205 Deepening	2029	Partially Delivered/ In Progress



Delivered

Partially Delivered/ In Progress

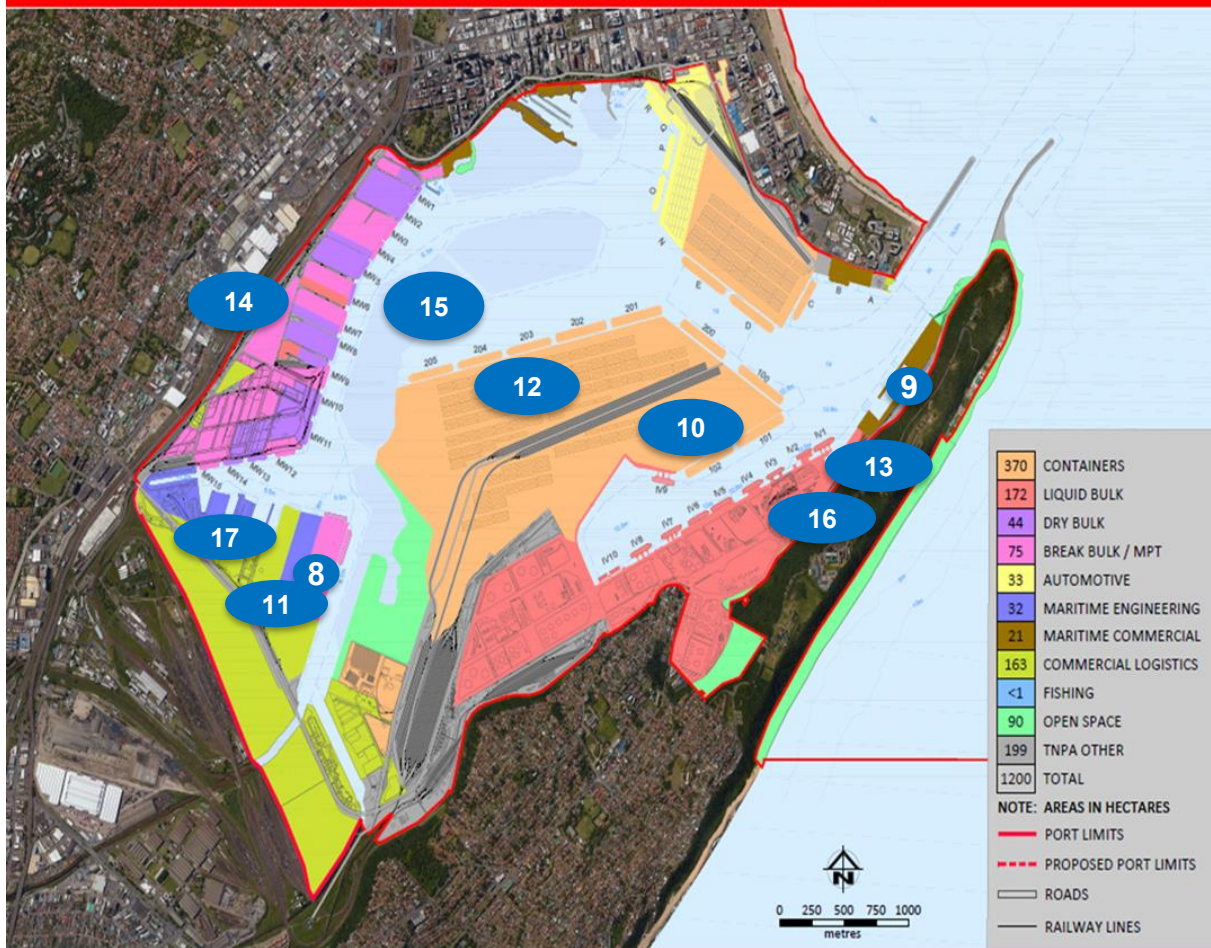
Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of Durban: Short Term (2022 – 2032)

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PORT OF DURBAN - SHORT TERM LAYOUT - 2032



NATIONAL PORTS PLAN 2022

Project #	Project Description	Operational Date	Status
8	New Multi Purpose Terminal	2032	Not Started/Cancelled
9	SA Navy Satellite Station	2028	Partially Delivered/ In Progress
10	Pier 1 Phase 1 Container Terminal and Rail Expansion	2032	Not Started/Cancelled
11	New Dry Dock	2031	Partially Delivered/ In Progress
12	Infill DCT Basin	2052	Not Started/Cancelled
13	Reconstruction of Island View Berth 1	2026	Partially Delivered/ In Progress
14	Reconfiguration of Maydon Wharf Precinct	TBC	Partially Delivered/ In Progress
15	Deepening of Maydon Wharf Berth 5 -11 & 15	2032	Partially Delivered/ In Progress
16	IV Berth 3 converted from Dry bulk to Liquid Bulk	2026	Not Started/Cancelled
17	New Propose Ship Lift	2031	Partially Delivered/ In Progress



Delivered



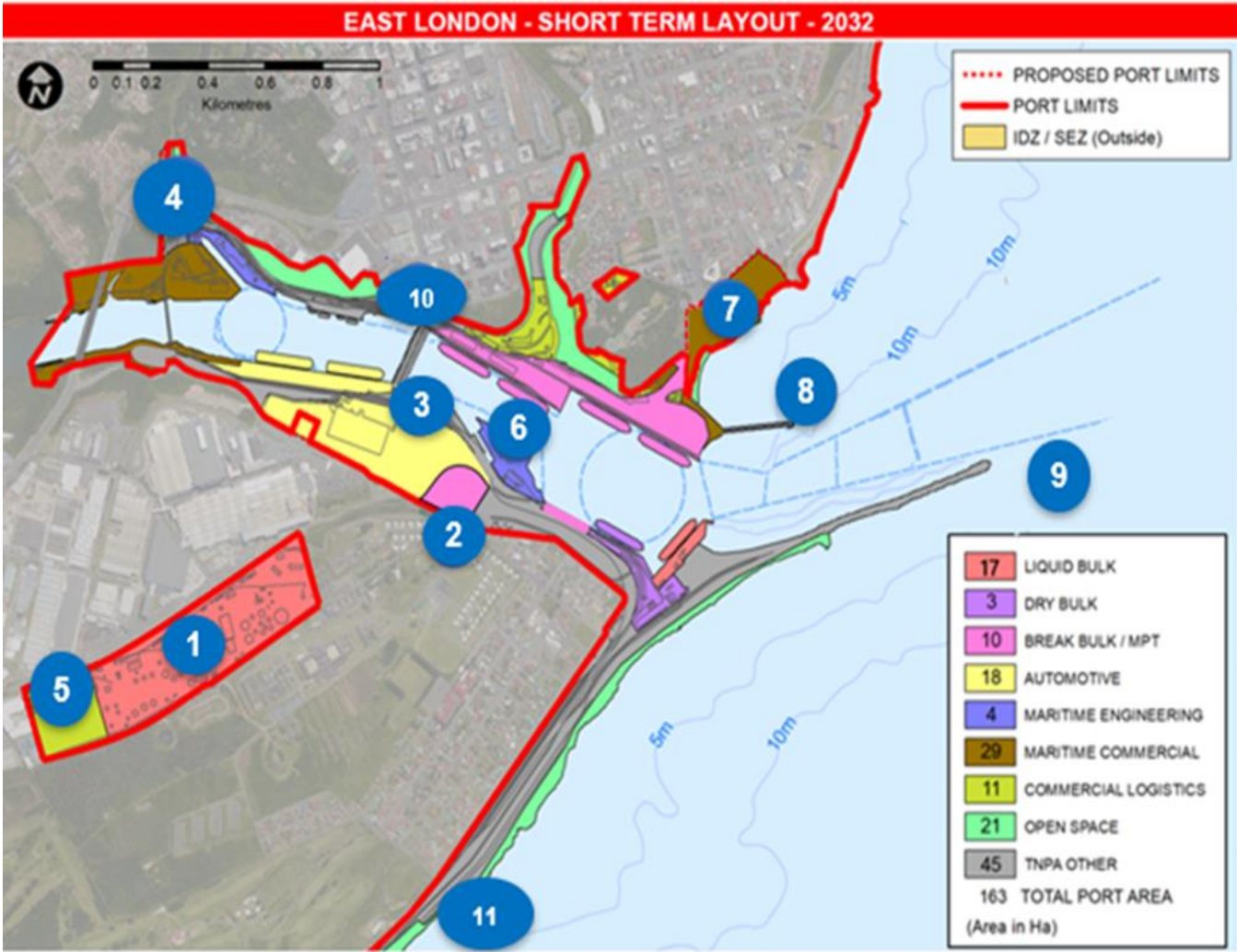
Partially Delivered/ In Progress



Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of East London: Short Term (2022 – 2032)



Project #	Project Description	Operational Date	Status
1	New proposed port limits and land acquisition at the south-western side of the port (Gately)	2023	⚠️
2	Old HFO site converts to MPT.	2024	⚠️
3	Deepening and strengthening of N berth.	2028	✅
4	Latimer's Landing will convert to maritime commercial.	2028	⚠️
5	Commercial logistics increase to double its current available space.	2031	⚠️
6	The Marine and Manufacturing slipway area converts to maritime engineering.	2032	⚠️



Delivered



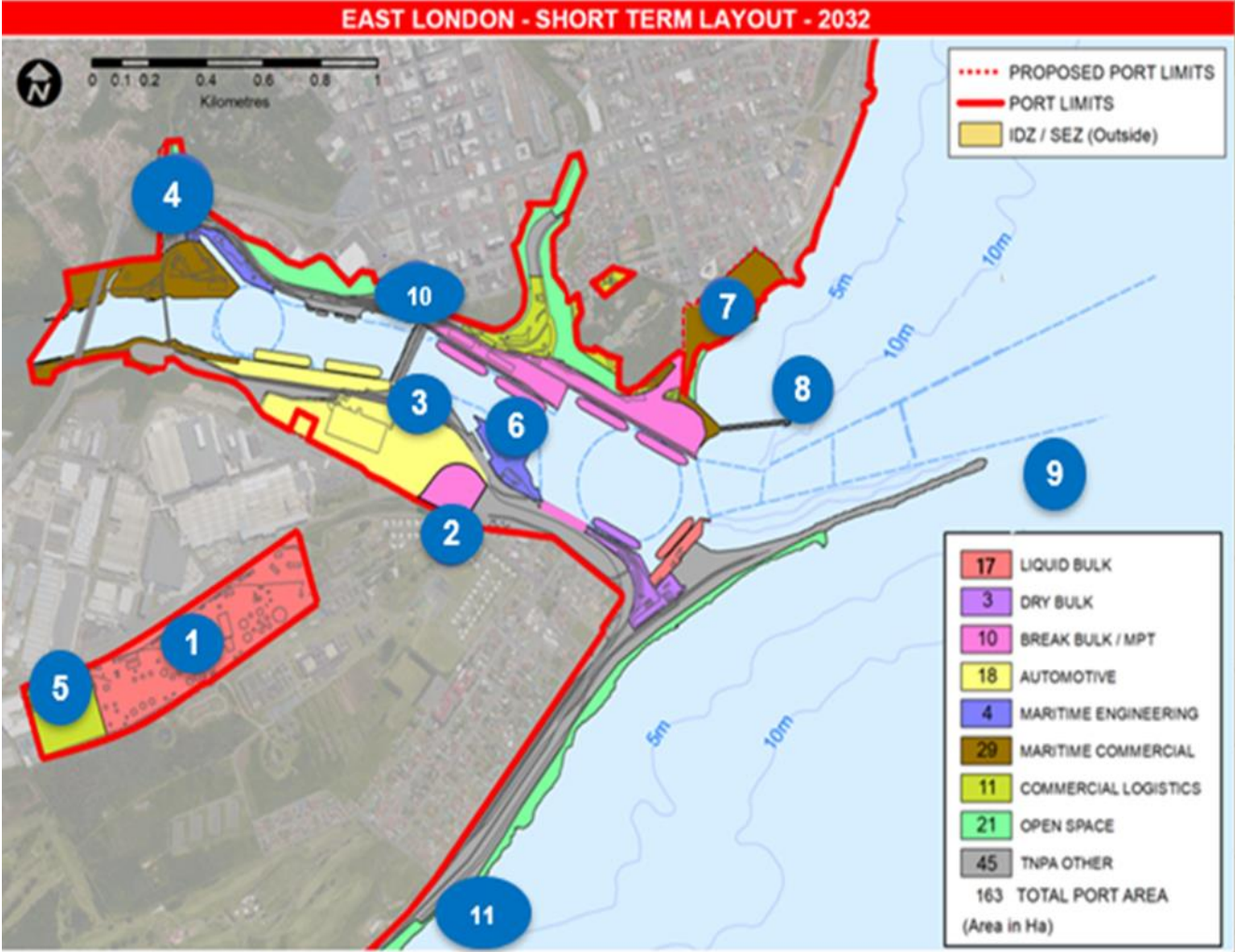
Partially Delivered/ In Progress



Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of East London: Short Term (2022 – 2032)



Project #	Project Description	Operational Date	Status
7	Port limits extend to the north due to land acquisition (Signal Hill).	2032	⚠
8	Realignment of the northern breakwater and deepening of entrance channel and turning basin	2032	⚠
9	Repositioning of sandtrap.	2032	⚠
10	Construction of a bridge that connects the East Bank to the West	2032	⚠
11	Potential locations for construction of Fishing Facilities	2032	⚠



Delivered



Partially Delivered/ In Progress



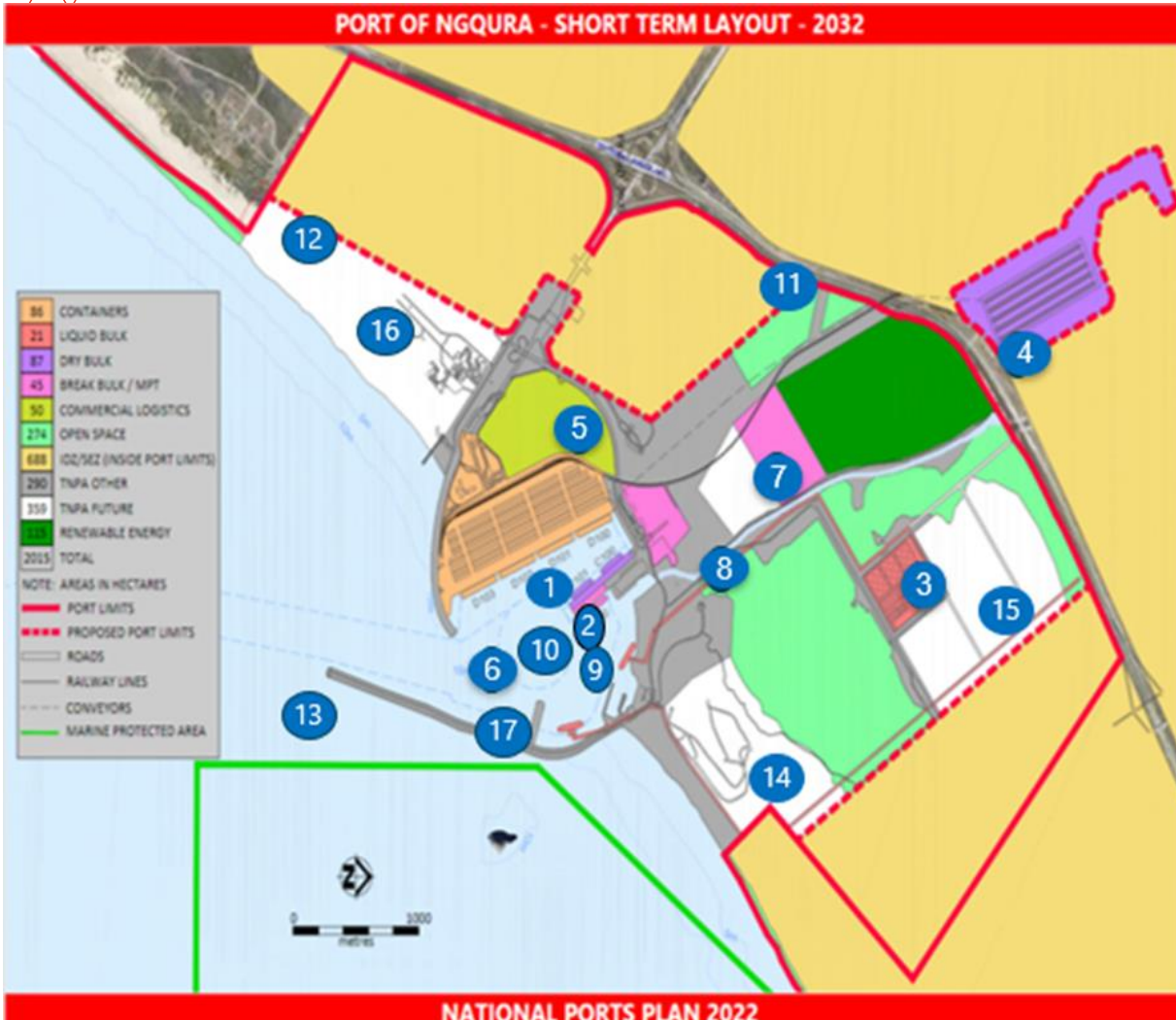
Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of Ngqura: Short Term (2022 – 2032)



PORT OF NGQURA - SHORT TERM LAYOUT - 2032



NATIONAL PORTS PLAN 2022

Project #	Project Description	Operational Date	Status
1	BB berths C100 and C101 convert to DB	2028	Delivered
2	MPT/Break Bulk berth B100 converts to liquid bulk	2024	Delivered
3	21 Ha of land is earmarked for liquid bulk	2027	Partially Delivered/ In Progress
4	Promulgation of the proposed manganese stockyard/NMET Projects	2024	Partially Delivered/ In Progress
5	Development of commercial logistics	2027	Partially Delivered/ In Progress
6	Relocation of the turning circle and channel alignment and dredge	2027	Partially Delivered/ In Progress
7	Repurposing of salt pans to accommodate breakbulk storage and renewable energy.	2026	Partially Delivered/ In Progress
8	The construction of the new canal.	2029	Not Started/Cancelled
9	Construction of Liquid berth A100.	2027	Partially Delivered/ In Progress
10	Liquid bulk berth B100 at MPT terminal changes back to break bulk.	2028	Not Started/Cancelled



Delivered



Partially Delivered/ In Progress



Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of Ngqura: Short Term (2022 – 2032)



PORT OF NGQURA - SHORT TERM LAYOUT - 2032



NATIONAL PORTS PLAN 2022

Project #	Project Description	Operational Date	Status
11	Proposed port limit project to exclude SEZ land.	2026	⚠️
12	Construction of new port entrance on the western side of the port.	2031	⏸️
13	Earmarked for offshore renewable energy solution	2031	⚠️
14	The proposed LNG storage facilities .	2028	⚠️
15	Land earmarked for extension of liquid bulk storage facilities (tank farm)	2027	⏸️
16	The land area earmarked for the extension of container capacity	2030	⏸️
17	Construction of the LNG berth	2028	⚠️



Delivered



Partially Delivered/ In Progress



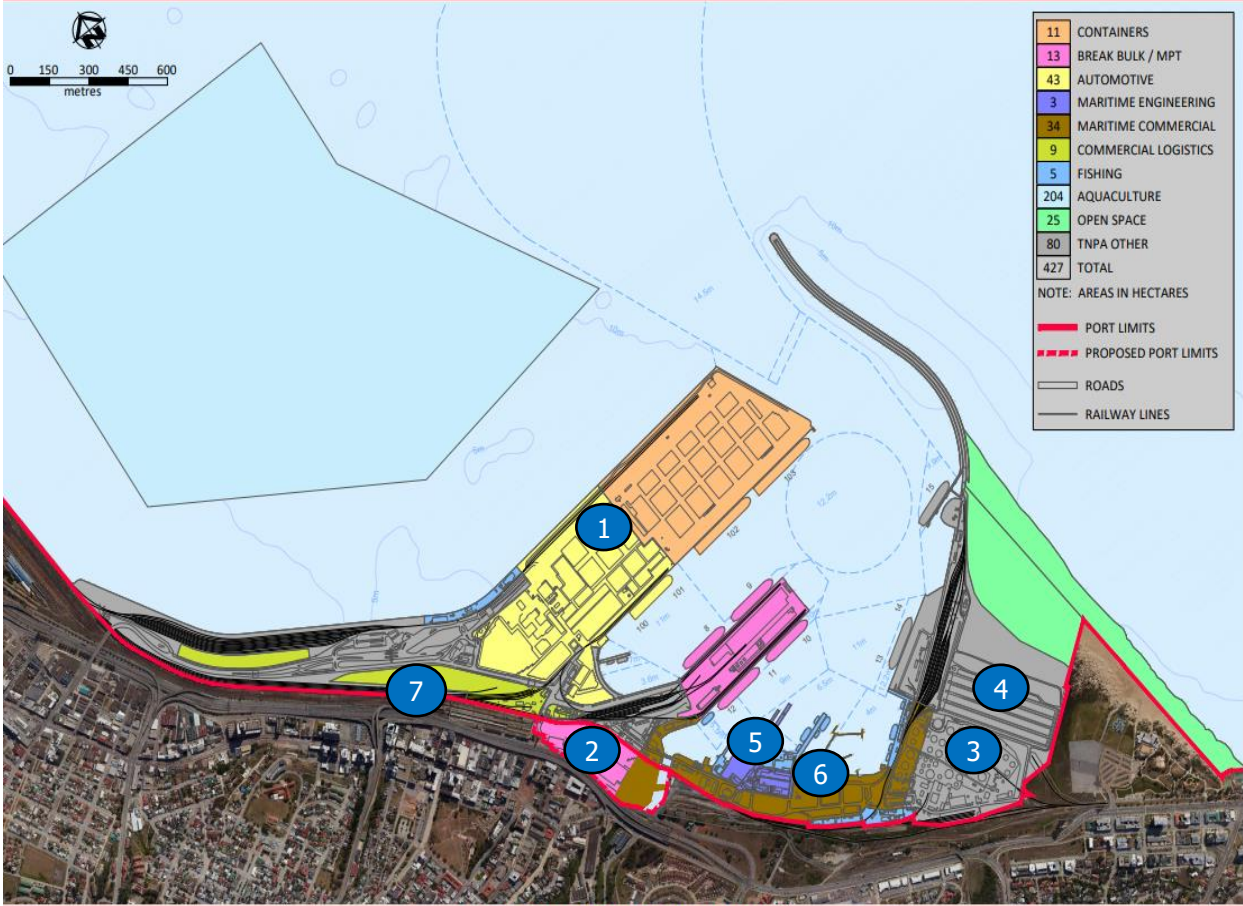
Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of Port Elizabeth: Short Term (2022 – 2032)



PORT OF PORT ELIZABETH - SHORT TERM LAYOUT - 2032



NATIONAL PORTS PLAN 2022

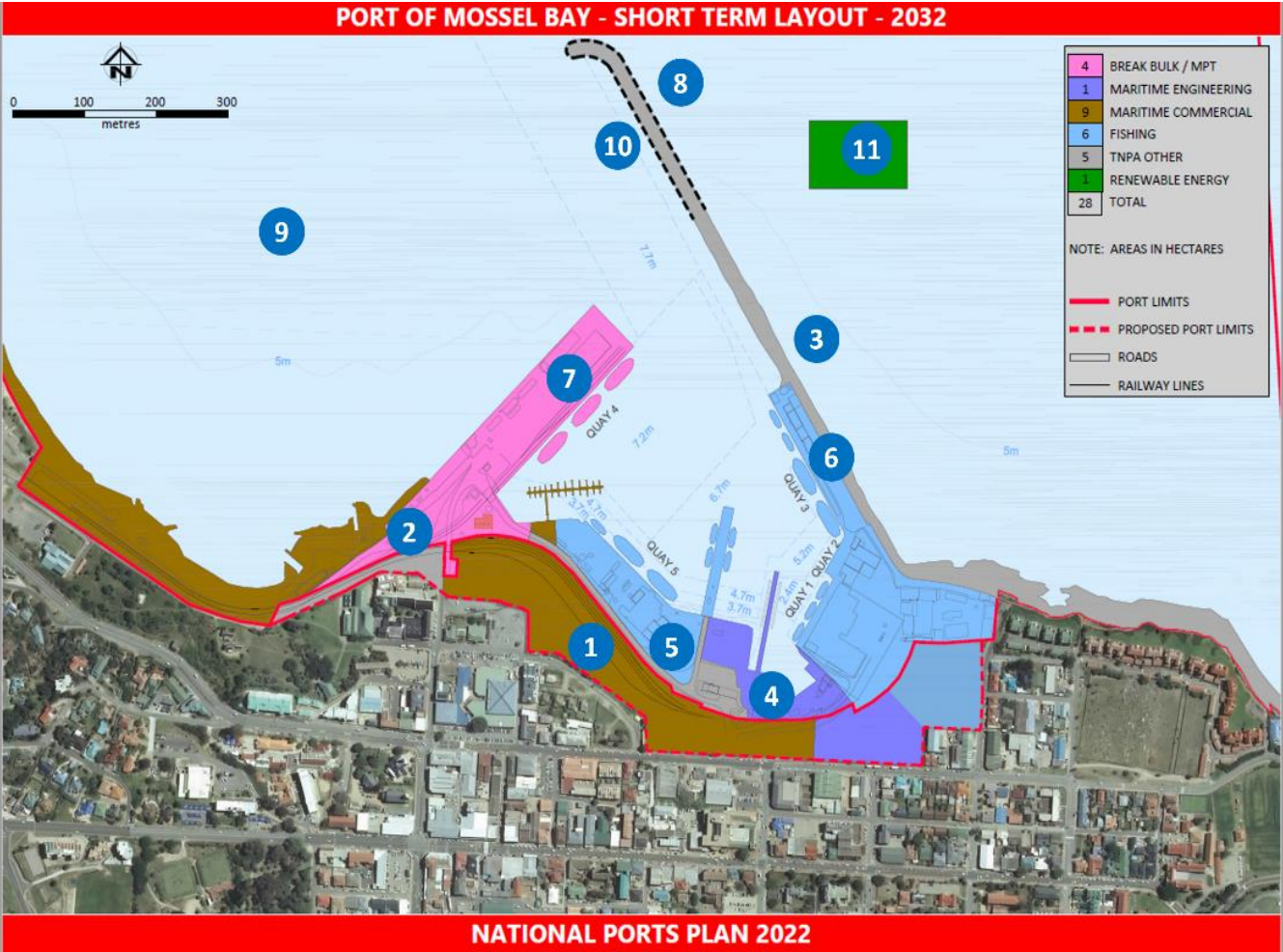
Project #	Project Description	Operational Date	Status
1	Expansion of Automotive Area (Include block 174)	2023	
2	Acquisition of 4ha of land outside the port limit	2025	
3	Decommissioning of the liquid bulk terminal	2030	
4	Decommissioning of the manganese terminal	2030	
5	Maritime engineering extension towards the southern side of the port.	2028	
6	Maritime commercial increases up to Shop 17 boundary.	2027	
7	Commercial Logistic Development	2026	



- Delivered
- Partially Delivered/ In Progress
- Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of Mossel Bay: Short Term (2022 – 2032)



Project #	Project Description	Operational Date	Status
1	Land Transfer from Transnet Properties	2023	⚠️
2	Maritime Recreational Road Upgrade	2022	✅
3	Existing Breakwater refurbishment –Protection	2024	⚠️
4	Upgrade slipway facility for ship repair / Boat building	2024	⚠️
5	Upgrading of service networks (electrical & Water) in Port	2024	⚠️
6	Replacement of sheet piles for Q3	2024	⚠️



Delivered



Partially Delivered/ In Progress



Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of Mossel Bay: Short Term (2022 – 2032)

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PORT OF MOSSEL BAY - SHORT TERM LAYOUT - 2032



Project #	Project Description	Operational Date	Status
7	Study on New MPT Terminal (Deepening of Quay Four North West)	2025	Partially Delivered/ In Progress
8	Breakwater Extension Feasibility and Execution	2025	Partially Delivered/ In Progress
9	Replace CBM with new SPM and associated infrastructure	2027	Partially Delivered/ In Progress
10	Study on Deepening of Entrance Channel including the Dredging of the Channel (Inside Quay 4)	2028	Partially Delivered/ In Progress
11	Renewable Energy Initiatives	2032	Not Started/Cancelled



Delivered



Partially Delivered/ In Progress



Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of Cape Town: Short Term (2022 – 2032)



Project #	Project Description	Operational Date	Status
1	Maritime Commercial- Cruise Terminal	2026	⚠
2	Culemborg Development of Intermodal Logistics Precinct (Phase 1)	2028	⚠
3	CTCT Phase2b Expansion (1M-1.4M) a) Landside Capacity b) PIP Truck Staging c) Rail	2029	⚠
4	Upgrade of EM1 access bridges for cargo operations	2027	⚠



Delivered



Partially Delivered/ In Progress



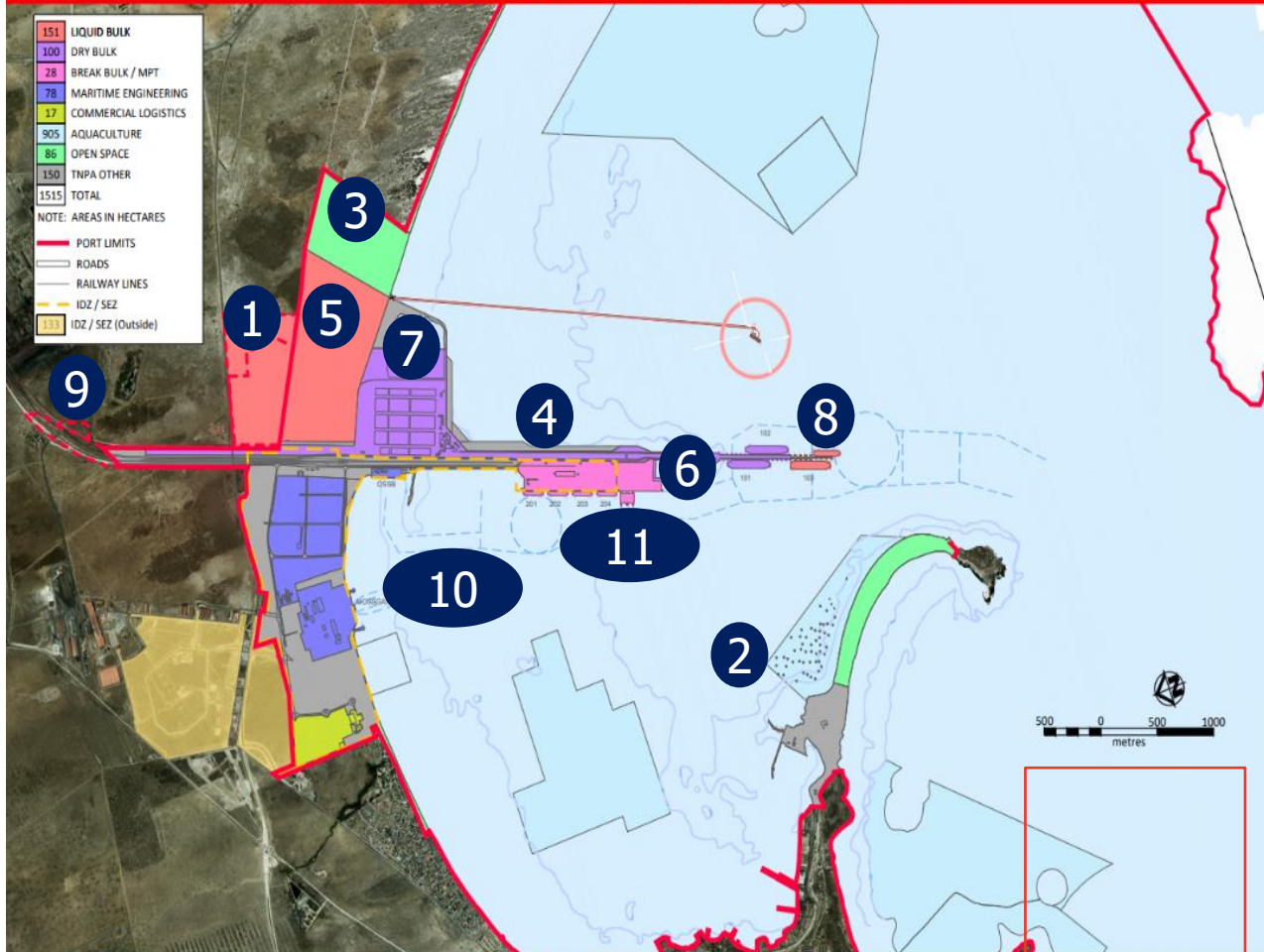
Not Started/Cancelled

PORT DEVELOPMENT FRAMEWORK PLANS

Port of Saldanha: Short Term (2022 – 2032)

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PORT OF SALDANHA BAY - SHORT TERM LAYOUT - 2032



NATIONAL PORTS PLAN 2022

Project #	Project Description	Operational Date	Status
1	Acquisition of land	2022	Delivered
2	Potential land availability for ship repairs at small craft harbour	2023	Not Started/Cancelled
3	Environmental constraints on this land hinders development	2025	Partially Delivered/ In Progress
4	Widening of causeway	2027	Not Started/Cancelled
5	Alternative energy, liquid bulk and gas potential storage	2028	Partially Delivered/ In Progress
6	New Berth 100 to increase handling capacity to 67MTPA	2028	Not Started/Cancelled
7	Increase Dry Bulk Storage (stockpile) land area handling capacity (Iron Ore)	2029	Not Started/Cancelled
8	Reconfiguration of Oil Jetty, Berth 104, handling of white fuels	2029	Partially Delivered/ In Progress
9	Relocation of Port Entrance	2029	Not Started/Cancelled
10	Marine Engineering	2029	Partially Delivered/ In Progress
11	Berth 205, Potential Marine engineering and other Bulk cargo	2030	Partially Delivered/ In Progress



Delivered



Partially Delivered/ In Progress



Not Started/Cancelled



CAPITAL EXPENDITURE



PREVIOUS YEAR'S PERFORMANCE: CAPEX

Operating Model Framework – “Fix The Core” Status

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	<h3>Work Structure</h3>	<ul style="list-style-type: none"> Optimizing resource deployment: In-source core team & balance workload with outsourcing. Capacitate the Ports, Project Management Office [PMO] & Design Office. Currently considering Fix Term Contract employees. Organisational Design on paused, pending PwC proposed operating model. 	
	<h3>Processes</h3>	<ul style="list-style-type: none"> Workflow & Task Automation. Process Model Architect. Process Redesign. 	
	<h3>Capability</h3>	<ul style="list-style-type: none"> Structure, Role & Accountabilities. Training & Development. Coaching & Enablement. 	
	<h3>Technology</h3>	<ul style="list-style-type: none"> Automation Data Management Integration Continuous Improvement 	



Delivered
Not Delivered
Partially Delivered

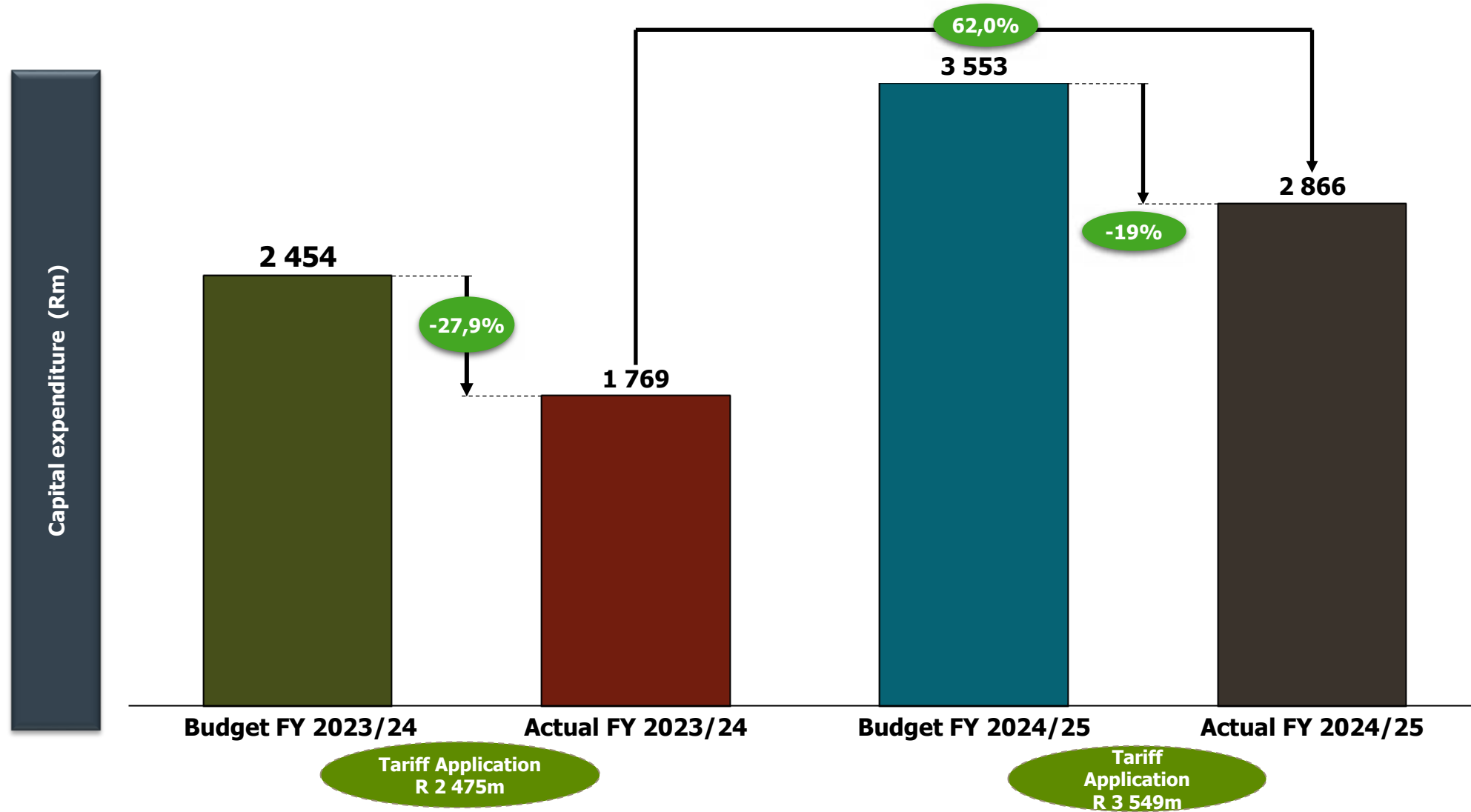
PREVIOUS YEAR'S PERFORMANCE

Capital Investment Performance FY 2024/25

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2024/25 CAPEX performance stands at **81% of the approved budget**, reflecting an improvement from 72% in the 2023/24 financial year.



PREVIOUS YEAR'S PERFORMANCE

Capital Investment Performance FY 2024/25: Port Level Performance

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Programme	Tariff Application (Rm)	Actual (Rm)	Variance (Rm)	Achievement (Rm)
Richards Bay	562	273	(289)	49%
Durban	489	1 307	818	267%
East London	365	449	84	123%
Ngqura	232	68	(164)	29%
Port Elizabeth	81	109	28	134%
Mossel Bay	91	56	(35)	62%
Cape Town	520	269	(251)	52%
Saldanha	311	30	(281)	10%
Dredging Services	316	69	(246)	22%
Head Office	4	1	(3)	29%
Lighthouses	7	3	(4)	44%
Transversal	571	232	(340)	41%
Grand Total	3 549	2 866	(683)	81%

CURRENT YEAR'S INITIATIVES

Capital Investment Programme FY 2025/26

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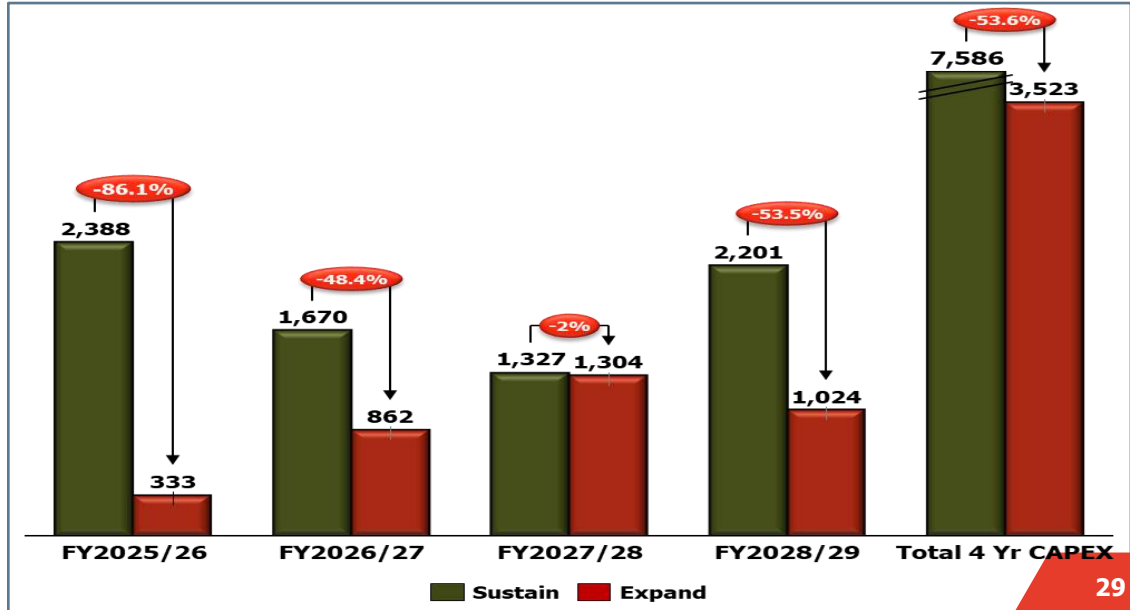
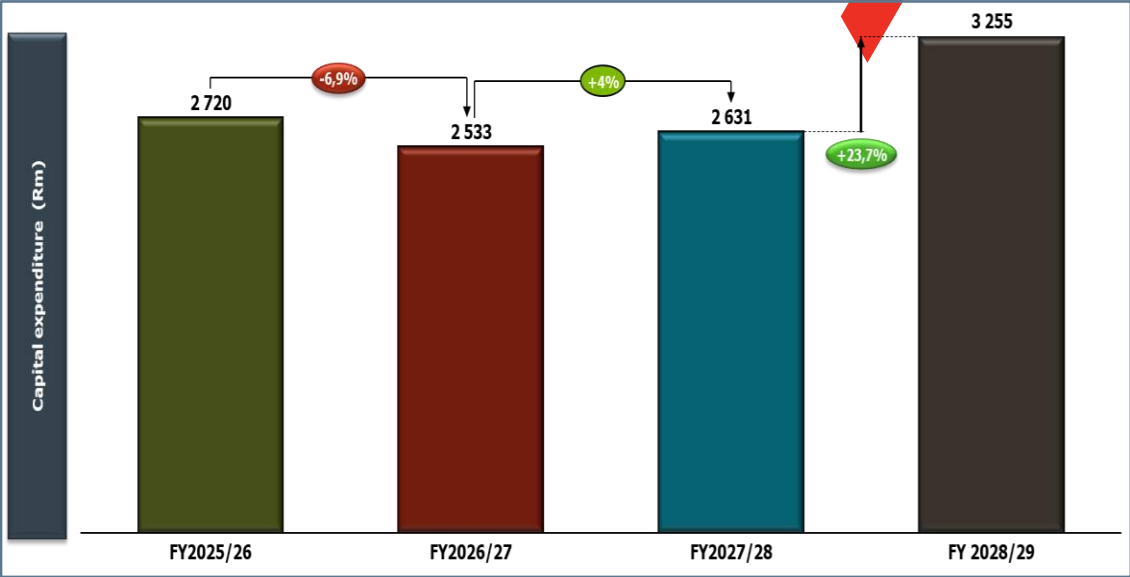


Tactical Measures 5 Pillar Approach	Initiatives	Impact
1. Pre-Qualified Service Providers	On-demand Engineering Services & Project Management Services	<ul style="list-style-type: none">• Pre-qualified providers ready for immediate deployment• Reduced procurement lead times• Streamlined contract execution
2. Advanced Project Planning	Early procurement initiation	<ul style="list-style-type: none">• Minimized project delays• Enhanced timeline predictability• Improved resource allocation
3. Weekly Tracking & Monitoring	Project milestone reviews	<ul style="list-style-type: none">• Proactive challenge identification• Real-time troubleshooting• Regional coordination
4. Monthly EXCO Oversight Re-launched: Jul 2025	Escalation mechanism	<ul style="list-style-type: none">• Executive-level project monitoring• Issue escalation and resolution• Strategic decision-making support
5. Use of Fix-Term Contract Resources	EXCO – Supported recruitment to fill critical project resource vacancies	<ul style="list-style-type: none">• Project - dedicated resources• Addresses capacity constraints• Ensures delivery capability

CAPITAL EXPENDITURE

4-Year Investment Plan Per Port: FY 2025/26 – FY 2028/29

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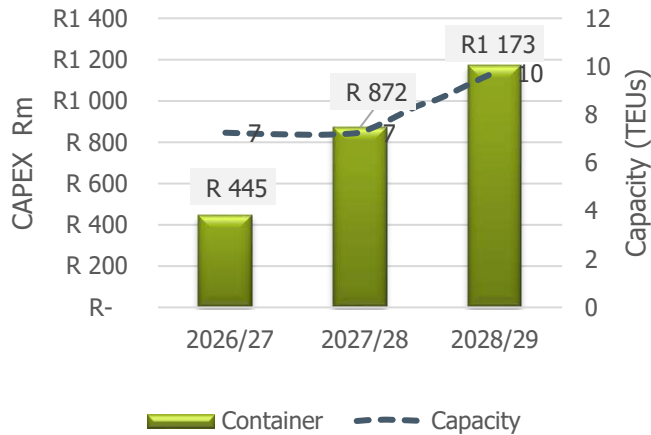
CAPITAL EXPENDITURE

3-Year Investment Plan Per Commodity: FY 2025/26 – FY 2028/29

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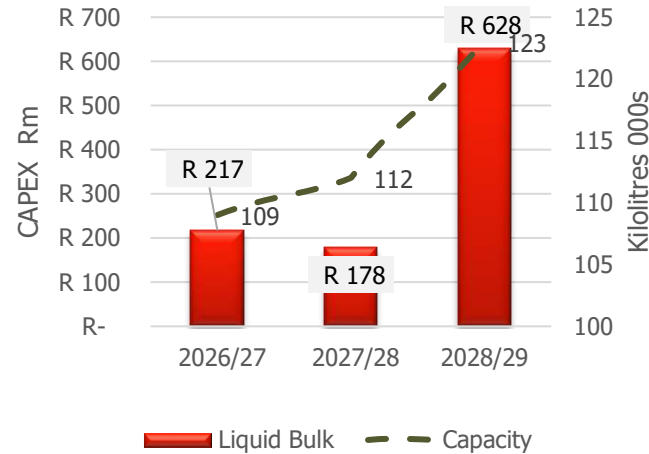
Capital Investment Container Programme



- New Container Berth 605 (RCB)
- DCT 203 – 205 Berth Deepening (DBN)
- Development of DBN Point Container Terminal
- CPT Container Terminal (Phase 2B)
- Acquisition of 66 Hydraulic Tension Units



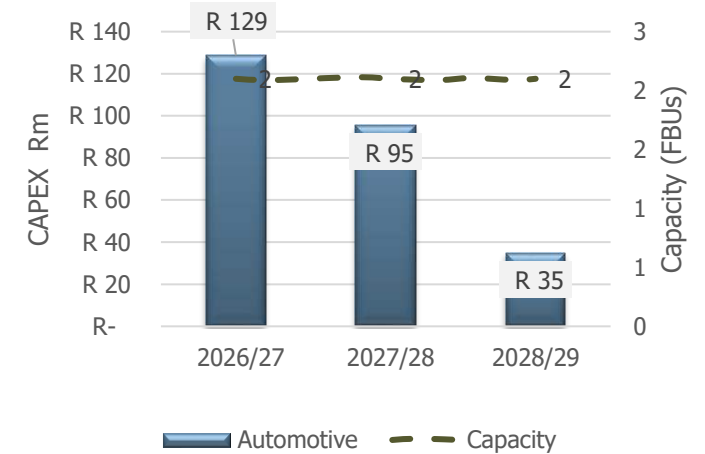
Capital Investment Liquid Bulk Programme



- Execution: IV sea walls
- Upgrade of Fire-Fighting Infrastructure at Island View, Port of Durban (Phase_2)
- Construction of Liquid bulk Berth A100
- Revetment Rehabilitation Tanker Berth & Berth 14
- Feasibility: New SPM and associated infrastructure



Capital Investment for Automotives Programme



- Point Automotive Terminal: Demolitions and Relocations
- Execution: Reconstruction of Quay 3
- Execution - Port Logistics Park



Targeted Initiatives

1. Implement a fleet asset maintenance plan for the marine, aviation and dredging - asset longevity and improved utilization.
2. Expedite infrastructure capital program to achieve the desired volume performance targets

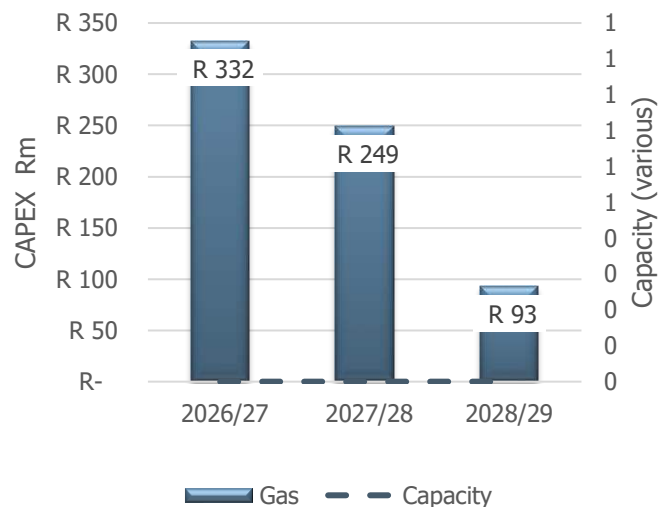
CAPITAL EXPENDITURE

3-Year Investment Plan Per Commodity: FY 2025/26 – FY 2028/29

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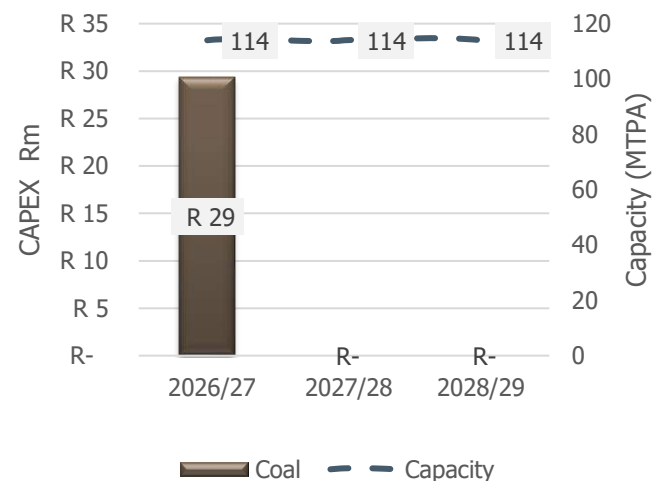
Capital Investment Gas Programme



- Bulk services for Liquefied Natural Gas - LNG
- Liquefied Petroleum Gas (LPG) Terminal In The Eastern Mole Reclaim Area – Port Of Cape Town
- Hydrogen projects: (NGQ, MSB, DBN & SLD)
- LNG terminal & breakwater – port of Ngqura



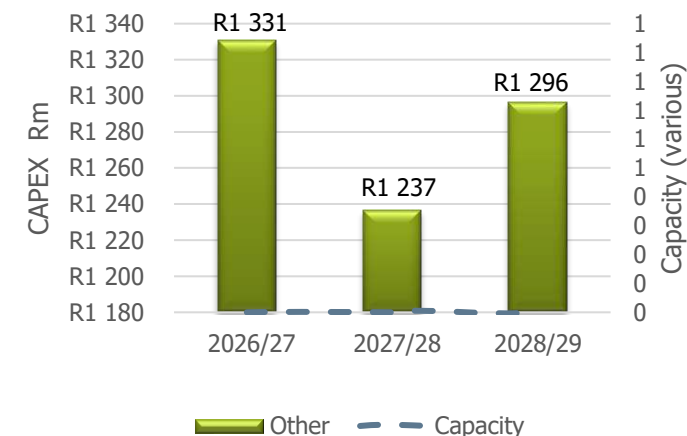
Capital Investment Coal Programme



- Feasibility: New Berths 709 & 710 for Neo Bulk



Capital Investment for "Other"



- Renewable Energy Electricity Generating System
- Helicopter acquisition (CPT, DBN and RCB)
- Cranes Acquisition (DBN and EL and CPT)
- Water supply via desalination various ports
- 2nd Cutter Suction Dredger and Self-propelled Split
- Land Acquisition: Port of Boegoebaai



Targeted Initiatives

1. Implement a fleet asset maintenance plan for the marine, aviation and dredging fleet for asset longevity and improved utilization.
2. Expedite infrastructure capital program to achieve the desired volume performance targets

CAPITAL EXPENDITURE

Operation Phakisa: FY 2025/26 – FY 2028/29

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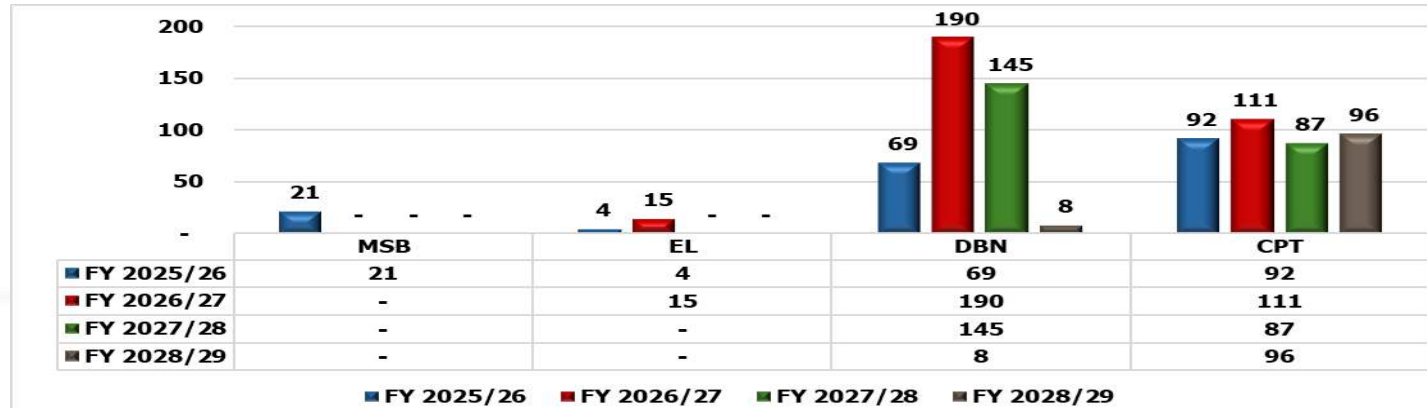


Total:
R21m

Total:
R19m

Total:
R412m

Total:
R386m



East London

- ❑ Replacement of 2 Graving Dock Jib Cranes

Durban

- ❑ Drydock Blocks
- ❑ Dry Dock Jib Cranes

Cape Town

- ❑ **Replacement of:** 10 cranes for Ship repair; Robinson Drydock floating caisson; Sturrock Drydock Inner Caisson
- ❑ Sturrock Dry Dock Electrical Infrastructure Upgrade (FEL 3&4) & Infrastructure Upgrade

Mossel Bay

- ❑ Execution: Slipway Upgrade



COMMERCIAL SERVICES

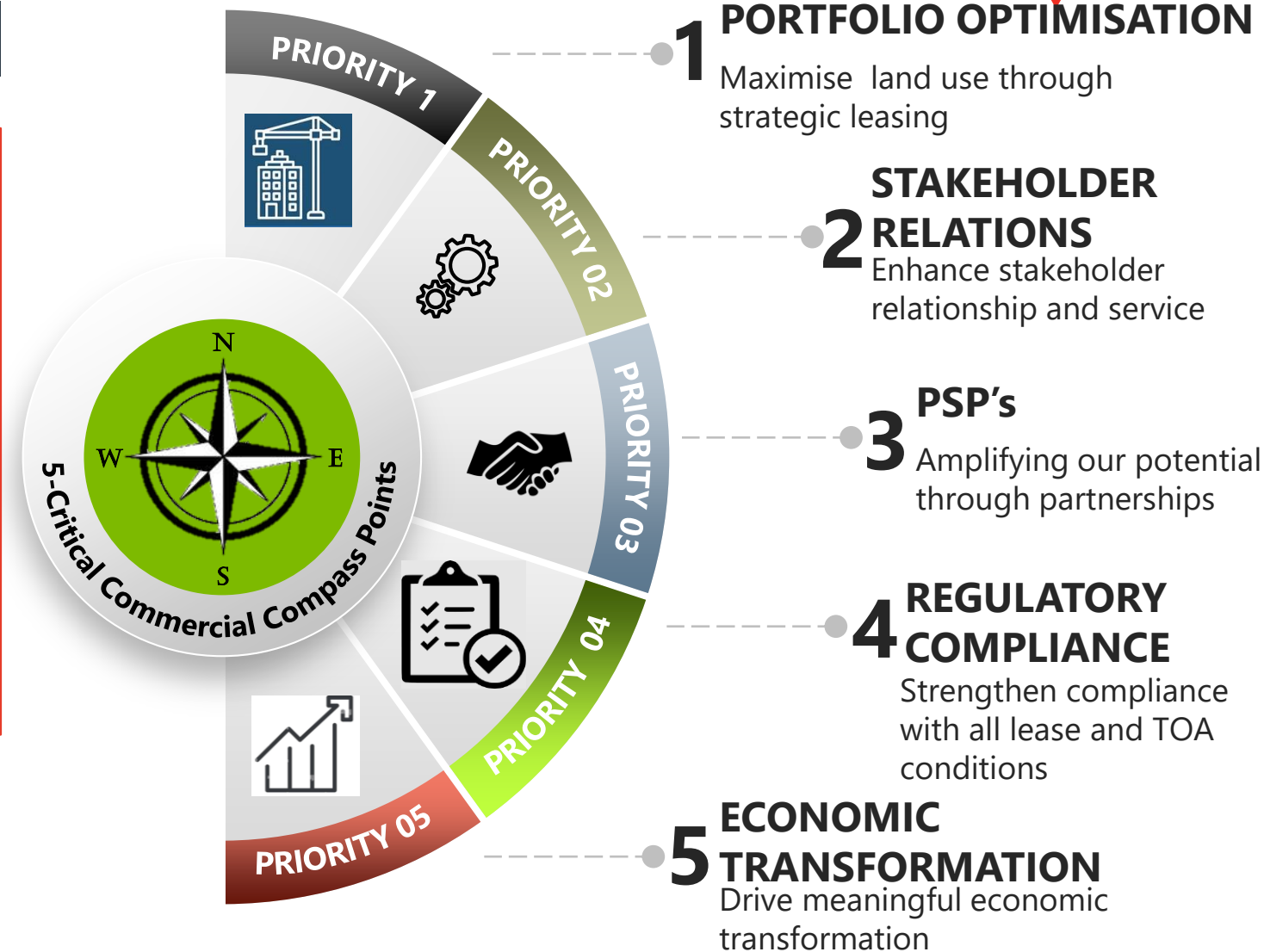


COMMERCIAL SERVICES OVERVIEW



The mandate of TNPA’s Commercial Services is:

The Commercial Department’s function is to maximize business growth through the effective management of business relationships, leasing, concession, and facilitating operational efficiencies.

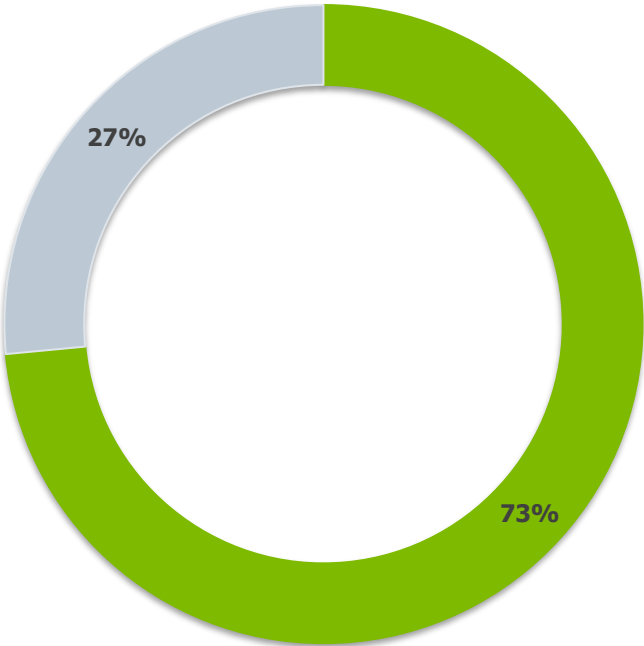


RENTABLE AREA UTILISATION – FY 2025/26



Currently, 73.5% of TNPA’s rentable land is occupied. The 26.5% vacant portion represents a significant opportunity for development, strategic leasing and revenue enhancement.

Rentable Area Utilisation (2025/26)



■ Occupied (73.5%) ■ Vacant (26.5%)

2025/2026 RFP's	
Port	Vacancy
Richards Bay	22
Durban	38
East London	16
Ngqura	0
Port Elizabeth	12
Mossel Bay	2
Cape Town	11
Port Nolloth	0
Saldanha	10
Lighthouses	0
	111

PRIVATE SECTOR PARTICIPATION (PSP)

Section 56 & 79

TRANSNET



Section 56 & 79

Concluded
(Concession period 25 years)

#	Port	Sector	Concessionaire
1	SLD	Liquid Bulk	Sunrise Energy (Pty) Ltd
2	CPT	Liquid Bulk	Burgan Cape Terminal (Pty) Ltd
3	CPT	Passenger	V&A Waterfront Holdings (Pty) Ltd
4	SLD	Liquid Bulk	Saldehco (Pty) Ltd
5	DBN	Passenger	KwaZulu Cruise Terminal (Pty) Ltd
6	PLZ	Multi-Purpose	Bidfreight Port Operations (Pty) Ltd
7	RCB	Liquid Bulk	Vopak SA Developments (Pty) Ltd
8	DBN	Liquid Bulk	Mnambithi Terminals (Pty) Ltd
9	RCB	Liquid Bulk	Zululand Energy Terminal
10	RCB	Liquid Bulk	FFS
11	RCB	Container	Grindrod & Amakhosi JV

CONCLUDED PROJECTS

- **TNPA Costs/ Investment:**
R6.6bn

- **PSP Cost/Investment:**
R11.0bn



Socio-Economic Benefits:

- Job creation and retention
- Contributes to national economy through significant Capex

PRIVATE SECTOR PARTICIPATION (PSP)

Section 56 & 79



IMMINENT TERMINAL OPERATOR AGREEMENTS				
#	Port	Sector	Brownfield	Greenfield
1.	Durban	Liquid Bulk (LPG)		X
2.	Durban	MPT (Fresh Produce)	X	
3.	Durban	Dry Bulk Terminal		X
4.	Cape Town	Liquid Bulk	X	
5.	Richards Bay	Liquid Bulk *5 Terminal Operators		X
6.	Richards Bay	Liquid Bulk		X
7.	Saldanha	Liquid Bulk (LNG)		X
8.	Ngqura	Liquid Bulk (LNG)		X

RFPs IN THE MARKET			
#	Port	Sector	Closing Date
1.	Cape Town	Liquid Bulk	12 August 2025
2.	Durban	MPT (Fresh Produce)	29 August 2025
3.	Durban	MPT (Agricultural Products)	12 September 2025
4.	Ngqura	Liquid Bulk	12 December 2025





OPERATIONS OVERSIGHT



OPERATIONS OVERSIGHT

Evolution Of Port Operations Oversight

Development

- Issuing of Terminal Operator Licences.
- Development of Terminal Operator Performance Standards (TOPS), including
 - ✓ Rail Performance
 - ✓ Haulier Performance
- Development of Marine Operator Performance Standards (MOPS).

Maturity & Review

- Workshops held with separated Stakeholders groups (Automotives, Containers, etc.) including Cargo Owners/Agents, Shipping Lines/Agents, Transporters.
- Voice of the Customer (VOC) determined identifying relevant Key Performance Indicators (KPIs) and processes.
- A need for benchmark study.

Sustain

- Implementation of Benchmark study recommendations in consultation with PCCs.
- Stakeholder consultations on development and implementation of Oversight Framework
- Approval of Oversight Framework by EXCO and implementation.

2012 - 2014

1

2015 - 2017

2

2018 - 2020

3

2021 - 2023

4

2024 - Beyond

5

Review

- TOPS and MOPS refinements.
- Port stakeholders engagement through quarterly Port Consultative Committees (PCCs) on TOPS and MOPS performance.
- Identifying areas of performance and gaps in the implemented TOPS and MOPS.
- Weighted Efficiency Gains from Operations (WEGO) by Ports Regulator of South Africa.

Improve

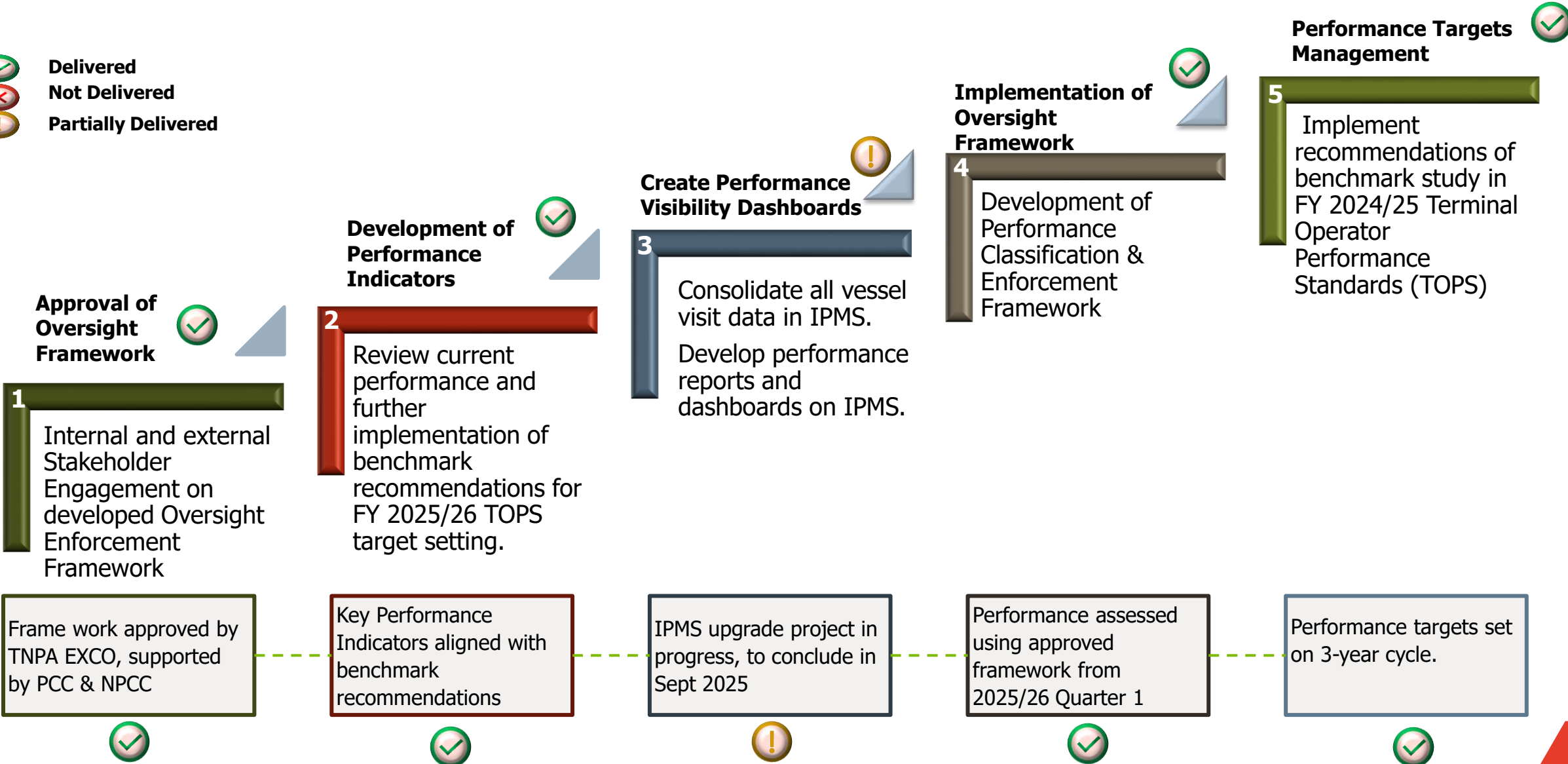
- Benchmarking project awarded to PWC (finalised in July 2023).
- Implementation of processes & KPIs inline with 2019/20 VOC workshop recommendation.
- Workshops held with separate stakeholder groups discussing benchmark results.
- Position Paper - WEGO learnings from VOC and benchmarking report.

PREVIOUS YEAR'S PERFORMANCE

Port Performance Stakeholder Journey FY 2024/25 & FY 2025/26



- Delivered
- Not Delivered
- Partially Delivered



PREVIOUS YEAR'S PERFORMANCE

Operation Oversight: Status Of Interventions Per Region



Function	Tariff Application FY 2024/25	% Completed	Correction Action Plan FY 2025/26
Eastern Region	a) Regular oversight meetings with Terminal Operators (TOs): PIP results- slow improvement of performance	100%	
	b) Daily OPS meeting (industry wide).	100%	
	d) Deployment of 5 Second-hand tugs.	100%	
	c) Bi-Weekly Decongestion meeting with TO and Truckers.	100%	
	e) Contracts with OEM – (Spares and Technical support)	100%	
Central Region	a) Shore Tension Units procured and deployed at Port of Ngqura to counter surge.	70%	Port currently has 10 units and 2 more units to be added from Port of SLD.
	b) Procurement of two (2) second hand tugs for the Port of East London.	100%	
	c) Commissioning of C-series road.	95%	Trial completed with TPT, and to be completed with other terminal operators
	d) Expanding manganese skip operations to include berth B100	100%	Terminal Operators are handling manganese on B100.



Delivered



Not Delivered



Partially Delivered

PREVIOUS YEAR'S PERFORMANCE

Operation Oversight: Status Of Interventions Per Region



Function	Tariff Application FY 2024/25	% Completed	Correction Action Plan FY 2025/26
Western Region	a) Marine Fleet Upgrade (construction of 2 x workboats)	30%	Requires increase in ETC submitted in Aug 2025 – Plan to complete in FY 2027/28
	b) Marine Fleet Upgrade (Construction of two launches for the Port of Cape Town)	100%	
	c) Marine Fleet Upgrade (Replacement of Two tugs)[i.e. 1 x Cape Town	20%	Execution in FY 2026/27
	d) Procurement of additional Shore Tension Units and deployed at CTCT to counter surge, delivery expected in FY 2025/26	60%	<ul style="list-style-type: none"> CT now has 12 units originally planned to have 16 units - increased to 20 units (SLD redeployed to CT). Service provider awaiting payments before further delivery of units – 60% is based on 20 units.
	e) CTCT Phase 2B Extension project (Container stack upgrade, Rail upgrade & Truck Staging and Automation)	20%	<ul style="list-style-type: none"> Conclusion of detailed design (95%). Governance approval & commencement of open tender processes.
	e) MOU concluded with CSIR – predictive wind modelling and potential engineering solutions for port operations	45%	<ul style="list-style-type: none"> Complete predictive wind model validation and operationalise. Complete economic impact assessment of wind delays. Scheduled completion in Dec 2026.
	e) Weekly/Quarterly engagement with stakeholders with daily per shift performance dashboard	100%	



Delivered
Not Delivered
Partially Delivered

OPERATIONS OVERSIGHT

WEGO vs Port Operations KPI



WEGO

- PRSA Oversight on TNPA
- Comparison of current performance with previous best
- Not considering changes in operating philosophy

2024/25 Financial Year - WEGO Performance Report								
WEGO Key Performance Indicators	Port of Richards Bay	Port of Durban	Port East London	Port of Ngqura	Port of Port Elizabeth	Port of Mossel Bay	Port of Cape Town	Port of Saldanha
Vessel Service Delays - TNPA Marine Services	5,1%	-111,1%	-15,8%	-29,3%	1,0%	0,0%	8,4%	-14,8%
Vessel Service Delays - Terminal Operators	-26,6%	0,0%	0,0%	-5,0%	0,0%	-1,7%	0,0%	0,0%
Ship Working Hour	-0,4%	-1,6%	0,1%	-3,1%	-1,4%	0,0%	-2,2%	-0,3%
Berth Productivity	-0,3%	-0,5%	-2,4%	-5,2%	-2,1%	0,0%	-4,2%	-0,4%
Ship Productivity Indicator	-6,0%	-7,5%	8,8%	-5,7%	-1,1%	-27,7%	-9,5%	-5,9%
Ship Turnaround Time	-2,6%	-7,4%	-21,7%	-10,5%	-20,8%	-18,6%	-25,3%	-13,6%
Port Efficiency Gain	-30,8%	-128,2%	-31,0%	-58,7%	-24,4%	-47,9%	-32,7%	-35,0%
Capped at 15%	-15,0%	-15,0%	-15,0%	-15,0%	-15,0%	-15,0%	-15,0%	-15,0%
Revenue Weighting	15,0%	48,2%	1,8%	6,0%	5,2%	0,6%	13,8%	9,5%
Weighted Port Performance	-2,2%	-7,2%	-0,3%	-0,9%	-0,8%	-0,1%	-2,1%	-1,4%
TNPA WEGO	-15,0%	LEGEND:			White	No Change from Previous Best Performance		
					Green	Improvement from Previous Best Performance		
					Red	Decline from Previous Best Performance		

Port Operations KPI

*Extract of TOPS and Operational KPIs

- TNPA Oversight on Terminal Operators
- Comparison of current performance based on set targets

2024/25 Financial Year - Port Operations KPIs Performance Report								
WEGO Key Performance Indicators	Port of Richards Bay	Port of Durban	Port East London	Port of Ngqura	Port of Port Elizabeth	Port of Mossel Bay	Port of Cape Town	Port of Saldanha
Vessel Service Delays - TNPA Marine Services	13,0%	4,9%	5,4%	8,7%	9,9%	10,0%	9,8%	28,3%
Vessel Service Delays - Terminal Operators	27,4%	50,0%	5,5%	3,8%	3,0%	9,3%	1,7%	10,0%
Ship Working Hour	0,9%	-2,0%	1,3%	-2,9%	0,1%	0,0%	3,6%	0,1%
Berth Productivity	0,1%	-0,5%	-1,1%	-3,8%	-1,6%	0,0%	5,5%	-0,4%
Ship Productivity Indicator	2,8%	-1,2%	3,8%	-5,0%	46,6%	-9,0%	11,9%	-1,7%
Ship Turnaround Time	-3,5%	-2,2%	5,0%	-4,9%	-0,1%	5,0%	15,5%	-2,7%
Port Efficiency Gain	40,7%	49,0%	19,9%	-4,1%	57,9%	15,4%	48,0%	33,6%
Capped at 15%	15,0%	15,0%	15,0%	-4,1%	15,0%	15,0%	15,0%	15,0%
Revenue Weighting	15,0%	48,2%	1,8%	6,0%	5,2%	0,6%	13,8%	9,5%
Weighted Port Performance	2,2%	7,2%	0,3%	-0,2%	0,8%	0,1%	2,1%	1,4%
Port Operations KPIs	13,9%	LEGEND:			White	No Change from Previous Best Performance		
					Green	Improvement from Previous Best Performance		
					Red	Decline from Previous Best Performance		



TARIFF APPLICATION



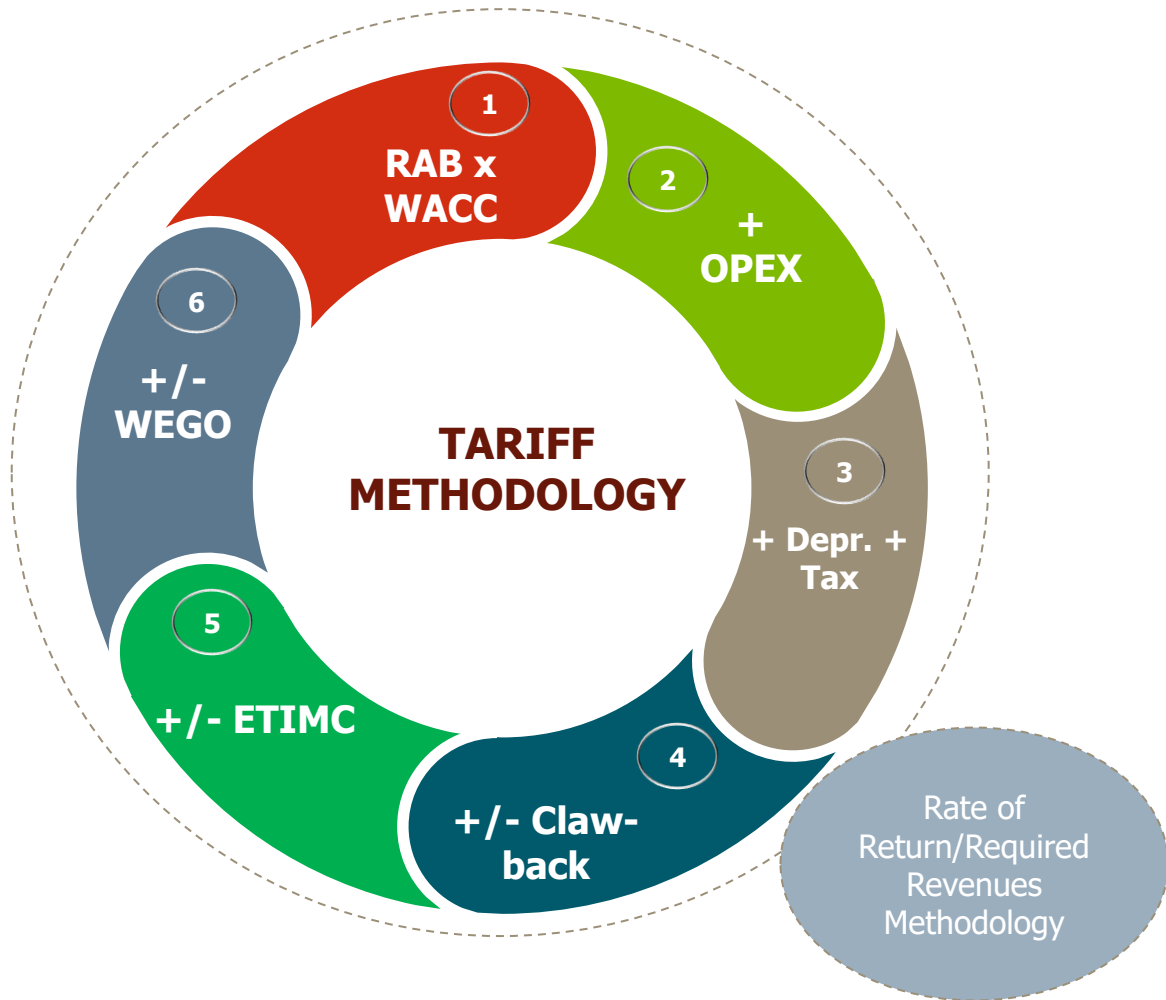
TARIFF APPLICATION

Revenue and Tariff Determination

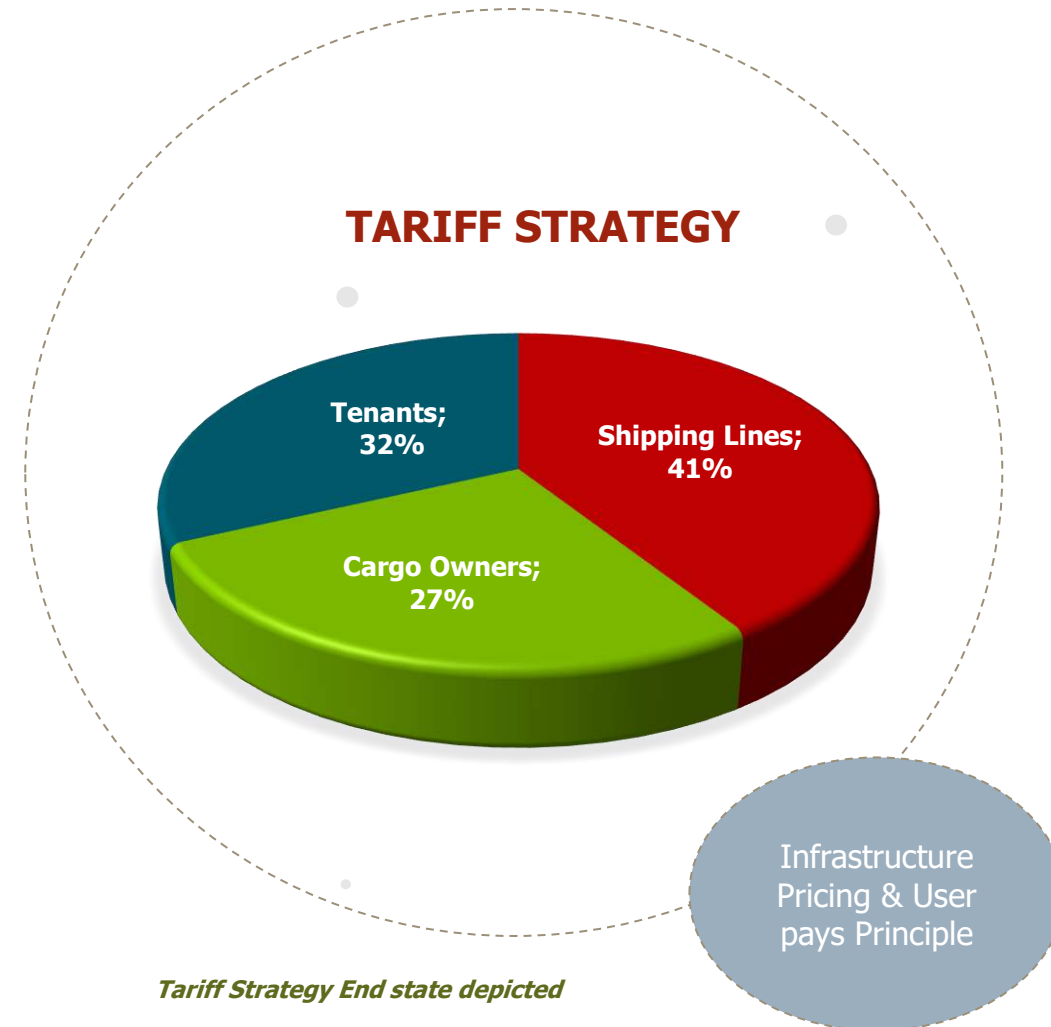
TRANSNET



Size of the Pie



Slicing the Pie



TARIFF APPLICATION

Return on Asset

TRANSNET



Regulatory Asset Base

REGULATORY ASSET BASE	FY 2026/27	FY 2027/28	FY 2028/29
	Fixed Tariff Year	Indicative Tariff Years	
		Rm	
Opening RAB	90,831	94,261	98,076
Inflation Index	3,746	4,016	3,480
Indexed RAB	94,577	98,277	101,555
Add: Capex	2,533	2,631	3,225
Depreciation	-2,848	-2,832	-2,792
Closing RAB	94,261	98,076	101,988
Average RAB	92,546	96,168	100,032
Less: Working Capital	-2,612	-2,754	-2,943
Regulatory Asset Base	89,934	93,415	97,088

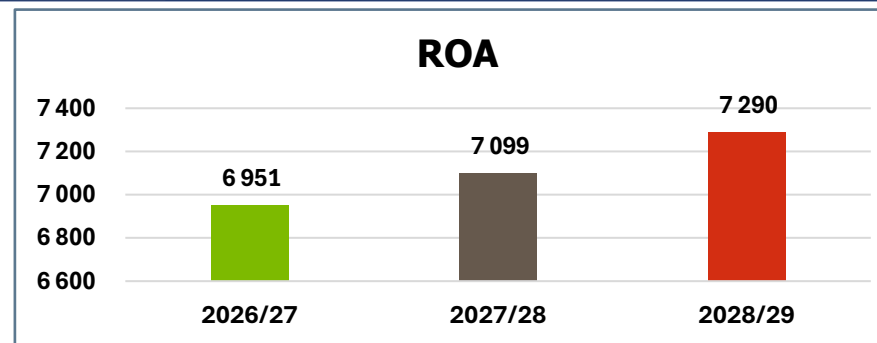
Real Vanilla WACC

Ke = 8.63%

Kd = 6.83%

Real Vanilla WACC		
2026/27	2027/28	2028/29
7.73%	7.60%	7.51%

Return on Asset (Rm)



RAB determined based on TOC and per Tariff Methodology rules

Real Vanilla WACC determined per Tariff Methodology dataset requirements

TARIFF APPLICATION

Operating Expenditure

TRANSNET



KEY COST DRIVERS



Labour Cost

Filling of critical vacancies and salary increases



Maintenance

Backlog of preventative maintenance and rehabilitation in Marine operations and Dredging



Information Systems

Strengthening cyber-security and Smart Port initiatives



Pre-feasibility Studies

Support delivery of long-term Capital Programme

Cost Category	Actual 2024/ 25 Rm	Budget 2025/ 26 Rm	Forecast 2026/ 27 Rm	Deviation Rm 25/ 26 vs 26/ 27	% Deviation 25/ 26 vs 26/ 27	Forecast 2027/ 28 Rm	Forecast 2028/ 29 Rm	CAGR 2026/ 27 - 2028/ 29
Labour Costs	3,193	3,487	3,825	339	9.7%	4,054	4,286	5.8%
Fuel	282	343	360	17	5.0%	378	396	4.9%
Electricity	617	686	728	43	6.2%	774	821	6.2%
Maintenance	655	815	875	59	7.3%	906	942	3.8%
Material	180	207	218	11	5.4%	231	244	5.7%
Informations systems	184	257	277	20	7.7%	302	317	7.0%
Insurance Operations	94	107	113	5	5.1%	118	124	4.8%
Professional services	40	102	105	3	2.7%	65	71	-17.9%
Rental & Leases	50	39	41	2	4.9%	43	45	4.6%
Rates & taxes	647	690	720	30	4.4%	772	766	3.1%
Water	335	268	281	13	4.9%	277	289	1.4%
Pre -Feasibility Studies	86	73	98	25	34.5%	103	138	18.7%
Security costs	196	225	235	10	4.5%	245	256	4.5%
Sundry operating costs	-397	-349	-441	-93	26.6%	-517	-561	12.8%
Total Operating Cost (Excl. Group Costs)	6,161	6,951	7,435	485	7.0%	7,750	8,133	4.6%
Group Costs	447	512	531	19	3.7%	554	577	4.3%
Total operating cost (Incl. Group Costs)	6,608	7,462	7,966	504	6.7%	8,304	8,710	4.6%
Less: Properties Outside Port Limits	-20	-21	-23	-2	9.4%	-25	-	
Total operating cost	6,588	7,441	7,943	502	6.7%	8,278	8,710	

TARIFF APPLICATION

Clawback

TRANSNET



FY 2024/25: ROD VS. ACTUALS

CLAWBACK	FY 2024/25	
	Rm	
	Record of Decision	Actuals
Return on asset	5,880	6,254
Depreciation	2,754	2,819
Opex (Including Group Costs)	6,430	6,588
Less: Fruitless and Wasteful expenditure	-	-30
Tax	1,251	-
WEGO	-226	-226
Clawback	-2,643	-2,643
ETIMC	983	983
Revenue Allowed/Actual Revenue	14,430	13,746
AFS Revenue		14,627
Clawback		-881
Clawback as per above		-881
Contract Revenue		-
Reverse FY 2024/25 Provisional Clawback taken in FY 2025/26		-83
Estimated Clawback for FY 2025/26 (half)		69
Add return on clawback account for FY 2024/25 and FY 2025/26		-110
Net Clawback		-1,005

KEY CONTRIBUTORS FOR CLAWBACK



OPEX

Actual Opex: Increased personnel costs, electricity expenses, electronic data costs, water and municipal rates & taxes, and security costs..



Fruitless & Wasteful Expenditure (F&W)

Actual results adjusted for F&W of R30m



Taxation

FY 2024/25 Corporate Tax allowance of R1 251m – not allowed due to non-corporatization of the Authority.



Higher ROA

Higher WACC due to lower inflation -Vanilla WACC of 6.86% (ROD) vs. actual (7.47%)


TARIFF APPLICATION

Required Revenue

TRANSNET



Revenue Requirement	FY 2026/27	FY 2027/28	FY 2028/29
	Fixed Tariff Year	Indicative Tariff Year	Indicative Tariff Year
	Rm	Rm	Rm
Return on Asset	6,951	7,099	7,290
Depreciation	2,848	2,832	2,792
Operating Costs	7,943	8,278	8,710
Taxation	1,436	1,469	1,510
Plus/Less Clawback	-1,005	69	-
Plus/less ETIMC	-1,196	-1,278	153
Plus/less WEGO	-247	-	-
Required Revenues	16,730	18,470	20,456

 <p>Fixed Tariff Year FY 2026/27</p> <p>Required Revenues : R16 730m</p> <hr/> <p>Real Estate Revenue: R5 481m</p> <hr/> <p>Marine Revenue: R11 249m</p> <hr/>	 <p>Indicative Tariff Year FY 2027/28</p> <p>Required Revenues : R18 470m</p> <hr/> <p>Real Estate Revenue: R5 865m</p> <hr/> <p>Marine Revenue: R12 605m</p> <hr/>	 <p>Indicative Tariff Year FY 2028/29</p> <p>Required Revenues : R20 456m</p> <hr/> <p>Real Estate Revenue: R6 305m</p> <hr/> <p>Marine Revenue: R14 151m</p> <hr/>
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TARIFF APPLICATION

Cargo Volume Projections

TRANSNET



KEY FACTORS:

- Economic factors (local & global)
- Market factors
- Production factors
- Port factors

CUSTOMER ENGAGEMENT

- Liquid bulk: Cargo Owners & Terminal Operators
- Auto: Terminal Operator
- Container: Shipping Lines
- Dry bulk: Customers & Terminal Operators
- Break bulk: Terminal Operators
- Vessel Agents and Associations

INTERNAL ALIGNMENT

- Commercial & Economics functions
- Operations & Oversight functions
- Planning & Marine functions
- Tariff & Finance functions

	Actual 2024/25	1E 2025/26	% change	Forecast 2026/27	% change	Forecast 2027/28	% change	Forecast 2028/29	% change	Forecast 2029/30	% change
Container (TEUs)											
Deepsea Full: Imports	1,549,560	1,492,788	-3.7% ↓	1,545,305	3.5% ↑	1,593,136	3.1% ↑	1,641,358	3.0% ↑	1,717,146	4.6% ↑
Deepsea Full: Exports	1,244,667	1,211,611	-2.7% ↓	1,232,397	1.7% ↑	1,269,479	3.0% ↑	1,307,347	3.0% ↑	1,362,743	4.2% ↑
Transshipments	430,085	506,019	17.7% ↑	539,913	6.7% ↑	563,797	4.4% ↑	588,758	4.4% ↑	617,267	4.8% ↑
Other	1,050,085	1,131,209	7.7% ↑	1,164,690	3.0% ↑	1,202,240	3.2% ↑	1,239,905	3.1% ↑	1,294,149	4.4% ↑
Total	4,274,397	4,341,627	1.6% ↑	4,482,305	3.2% ↑	4,628,652	3.3% ↑	4,777,368	3.2% ↑	4,991,304	4.5% ↑
Vehicles (Units)											
Vehicles: Imports	351,160	349,051	-0.6% ↓	346,695	-0.7% ↓	351,554	1.4% ↑	358,966	2.1% ↑	363,467	1.3% ↑
Vehicles: Exports	410,729	411,647	0.2% ↑	410,465	-0.3% ↓	416,894	1.6% ↑	430,474	3.3% ↑	438,680	1.9% ↑
Other	45,317	46,086	1.7% ↑	55,802	21.1% ↑	55,843	0.1% ↑	55,886	0.1% ↑	55,929	0.1% ↑
Total	807,206	806,783	-0.1% ↓	812,962	0.8% ↑	824,291	1.4% ↑	845,326	2.6% ↑	858,076	1.5% ↑
Break Bulk (Metric Tons)											
Break Bulk: Imports	4,495,945	3,528,587	-21.5% ↓	3,326,594	-5.7% ↓	3,372,094	1.4% ↑	3,418,234	1.4% ↑	3,466,189	1.4% ↑
Break Bulk: Exports	2,117,411	1,769,501	-16.4% ↓	1,676,243	-5.3% ↓	1,701,693	1.5% ↑	1,730,087	1.7% ↑	1,758,681	1.7% ↑
Other	75,125	26,608	-64.6% ↓	25,926	-2.6% ↓	28,359	9.4% ↑	31,141	9.8% ↑	53,544	71.9% ↑
Total	6,688,480	5,324,697	-20.4% ↓	5,028,763	-5.6% ↓	5,102,146	1.5% ↑	5,179,462	1.5% ↑	5,278,414	1.9% ↑
Dry Bulk (Metric Tons)											
Coal Exports	66,957,100	72,349,764	8.1% ↑	73,985,262	2.3% ↑	80,020,308	8.2% ↑	83,120,566	3.9% ↑	85,738,446	3.1% ↑
Iron Ore Exports	51,317,431	53,092,182	3.5% ↑	54,124,137	1.9% ↑	54,125,378	0.002% ↑	54,126,632	0.002% ↑	54,127,898	0.002% ↑
Manganese Ore Exports	23,514,061	20,760,800	-11.7% ↓	20,777,925	0.1% ↑	20,830,477	0.3% ↑	20,843,328	0.1% ↑	20,856,488	0.1% ↑
Other Dry Bulk	31,099,608	33,021,528	6.2% ↑	35,040,822	6.1% ↑	35,856,564	2.3% ↑	36,700,921	2.4% ↑	38,082,310	3.8% ↑
Total	172,888,200	179,224,273	3.7% ↑	183,928,146	2.6% ↑	190,832,726	3.8% ↑	194,791,447	2.1% ↑	198,805,142	2.1% ↑
Liquid Bulk (kd)											
Petroleum	30,165,651	28,415,102	-5.8% ↓	28,259,579	-0.5% ↓	29,523,657	4.5% ↑	30,702,977	4.0% ↑	32,269,386	5.1% ↑
Chemicals	1,315,807	2,675,773	103.4% ↑	2,494,016	-6.8% ↓	2,512,481	0.7% ↑	3,148,573	25.3% ↑	3,167,345	0.6% ↑
Other Liquid bulk	5,374,834	4,714,544	-12.3% ↓	5,291,586	12.2% ↑	4,787,235	-9.5% ↓	5,401,846	12.8% ↑	5,480,547	1.5% ↑
Total	36,856,292	35,805,419	-2.9% ↓	36,045,181	0.7% ↑	36,823,372	2.2% ↑	39,253,396	6.6% ↑	40,917,277	4.2% ↑
Weighted Cargo	292,088,175	297,081,467	1.7% ↑	304,035,626	2.3% ↑	314,235,297	3.4% ↑	323,270,130	2.9% ↑	332,584,385	2.9% ↑

- Political economy to Trade policy shift
- Transnet's R4G Strategy
- Projected economic activity of Trading partners

Translates into
revenue volume
growth of 2.04%
for FY 2026/27

TARIFF APPLICATION

Volume Growth & Tariff Adjustments



The table below provides an analysis of volume growth and revenue thereof, as well as the tariff adjustments:

Details	2026/27	2027/28	2028/29
	Fixed Tariff Year	Indicative Tariff Year	Indicative Tariff Year
	Rm	Rm	Rm
Current year allowable revenue	16,730	18,470	20,456
Real Estate Revenue	(5,481)	(5,865)	(6,305)
Marine revenue	11,249	12,605	14,151

Prior year revenue	10,057	11,249	12,605
Volume Growth	2.04%	2.23%	2.42%
Revenue increase due to volume growth	10,263	11,500	12,910
Revenue Increase: Tariff adjustment + Volume Increase	1,192	1,356	1,546
Revenue as a result of volume increase	206	251	305
Revenue as per tariff calculation	986	1,105	1,241
Tariff Increase%	9.61%	9.61%	9.61%

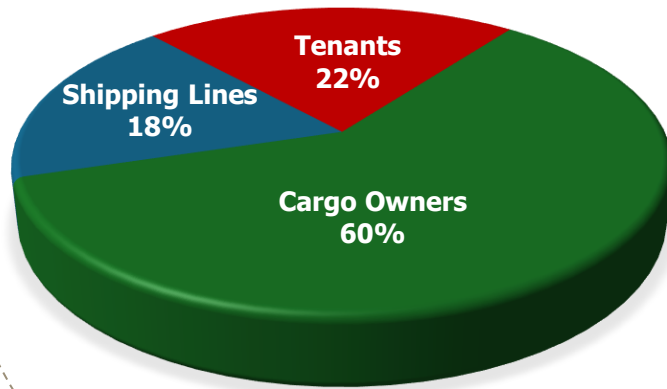
TARIFF APPLICATION

Tariff Strategy

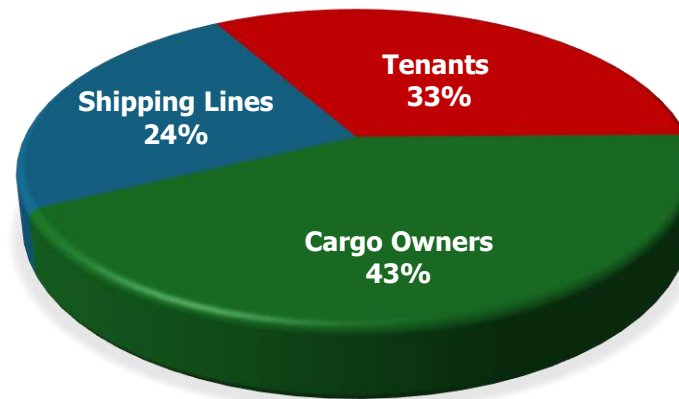
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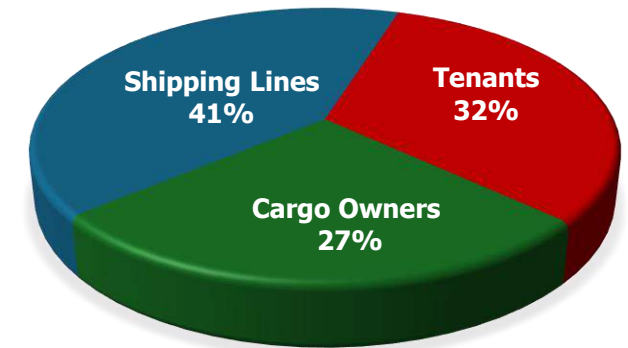
PRE-TARIFF STRATEGY SPLIT



FY 2026/27 TARIFF PROPOSAL



ENVISAGED TARIFF STRATEGY STRUCTURE



□ Tariff Strategy:

- Sets out a strategic direction for the South African port system;
- Premised on the user-pay principle;
- Moving towards infrastructure based charges; and
- Implementation results in differentiated tariff increases for marine services and within the various cargo dues categories.




TARIFF APPLICATION

Tariff Strategy & Differentiated Tariff Adjustments



Inclusive of African Port Comparator

DIFFERENTIATED TARIFFS FY 2026/27

 CARGO TYPE/COMMODITY/SERVICE	 IMPORTS	 EXPORTS
Containers	8.61%	8.61%
Containers (Empties, Transshipment, Coastwise)	9.61%	9.61%
Breakbulk	9.61%	9.61%
Dry Bulk	9.61%	9.61%
Dry Bulk Coal & Magnetite	9.61%	9.84%
Liquid Bulk	8.61%	8.61%
Automotives	8.61%	8.61%
Other cargo transhipped	9.61%	9.61%
Marine		11.24%

Average Tariff Increase = 9.61%



1. Administrative Fees: Section 4.11.3

Current Wording

Voyage Performance Report must be submitted electronically on the Integrated Port Management System (IPMS), within 24 hours after vessel departs.
Penalty for non submission of Voyage Performance Report.....R2 045.47

Proposed Wording

Voyage Performance Report must be submitted electronically on the Integrated Port Management System (IPMS), within **48 hours** after vessel departs.
Penalty for non submission of Voyage Performance Report.....R2 281.52

Rationale:

- To give customers sufficient time to source the required documentation.

2. Late Order Fees: Section 7.8



Current Wording

New addition

Proposed Wording

Cancellation fee is applicable for all cancellations of cargo documentation as follows:

Cargo dues order cancellation fee per order..... R392.38

Rationale:

- Currently whilst amendments attract a fee, cancellations do not - amendment to ensure recovery the administrative cost of processing cancellations

3. Responsible Party: Section 8.2

Current Wording

New addition

Proposed Wording

During collation process, once the Authority bills the Container Operator/Shipping Line/Vessel Agent, the vessel file will be deemed complete and closed. The said Container Operator/Shipping Line/Vessel Agent must settle directly with the Clearing & Forwarding Agent thereafter.

Rationale:

- Removes the administrative burden on the Authority to pass credits.

4. Cancelling Orders: Section 8.5



Current Wording

New addition

Proposed Wording

Cancellation fees will be applicable to all orders being cancelled. The account number appearing on the cargo dues order will be debited accordingly.

Cargo dues order cancellation fee per order..... R392.38

Rationale:




- To ease the administrative burden where cancellations due to duplications are submitted.



REQUIRED REVENUE AND AVERAGE TARIFF ADJUSTMENT



DIFFERENTIATED TARIFFS FY 2026/27

 CARGO TYPE/COMMODITY/SERVICE	 IMPORTS	 EXPORTS
Containers	8.61%	8.61%
Containers (Empties, Transhipment, Coastwise)	9.61%	9.61%
Breakbulk	9.61%	9.61%
Dry Bulk	9.61%	9.61%
Dry Bulk Coal & Magnetite	9.61%	9.84%
Liquid Bulk	8.61%	8.61%
Automotives	8.61%	8.61%
Other cargo transhipped	9.61%	9.61%
Marine		11.24%

The differentiated tariff increases = weighted average tariff adjustment of 9.61% for FY 2026/27.

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*national ports
authority*

THANK YOU

