Ports Sector Review

A five-year review of the South African port system

2025/2026

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Abbreviations

CAPEX	Capital Expenditure
CT	Cape Town
DBN	Durban
DCT	Durban Car Terminal
DWT	Deadweight Tonnage
EL	East London
ERTA	Economic Regulation of Transport Act
GPCS	Global Pricing Comparator Study
GT	Gross Tonnage
GRT	Gross Registered Tonnage
MB	Mossel Bay
MBM	Multi-buoy mooring
MPT	Multi-Purpose-Terminal
NAAMSA	National Association of Automobile Manufacturers of South Africa
NGQ	Ngqura
NPA	National Ports Authority
OECD	Organization for Economic Co-operation and Development
PDFP	Port Development Framework Plan
PE	Port Elizabeth
PPS	Proposed Pricing Strategy
PSR	Ports Sector Review
PRSA	Ports Regulator of South Africa
PTIP	Port Tariff Incentive Programme
RB	Richards Bay
RHS	Right hand side
Ro-Ro	Roll-on, Roll-off
SAMSA	South African Maritime Safety Authority
SLD	Saldanha Bay
STS	Ship-To-Shore
TEU	Twenty-foot Equivalent Unit
TER	Transport Economic Regulator
TOPS	Terminal Operator Performance Standards
TPT	Transnet Port Terminal
UNCTAD	United Nations Conference on Trade and Development
VoRAB	Valuation of Regulatory Asset Base

1 Introduction

This report comprises the third five-year Ports Sector Review ("PSR") conducted by the Ports Regulator ("the Regulator"). The purpose of the PSR is to periodically assess the impact of economic regulation and reflect on developments in the port system, as well as to provide an opportunity for the Regulator to compile and analyse the data which has been collected during the previous five years. In doing so, the PSR examines how the National Ports Authority ("the NPA" or "the Authority") has carried out its mandated duties and strategic objectives in supporting economic growth, promoting exports, and enhancing competitiveness.

The research reviews the seaports' infrastructure, volumes, capacity advantages and constraints, and overall contribution to the overall ports system. The review draws on research published by the Regulator since its inception, to provide a comprehensive overview of the ports system, with particular emphasis on the National Ports Authority. Additional sources include but are not limited to NPA and port users reports, stakeholder engagements, CAPEX plans, and roadshows completed by the Ports Regulator.

Confidential information on the NPA and of third parties sourced was managed in terms of both Chapter 4 of the Regulations to the National Ports Act, 12 of 2005 and Chapter 8 of the Directives to the National Ports Act 12 of 2005. Data limitations experienced are addressed in the text.

2 Ports governance in South Africa

South African ports operate on a landlord model, with the nine largest ports[1] owned by a single landlord, the National Ports Authority, which is in turn owned by Transnet.

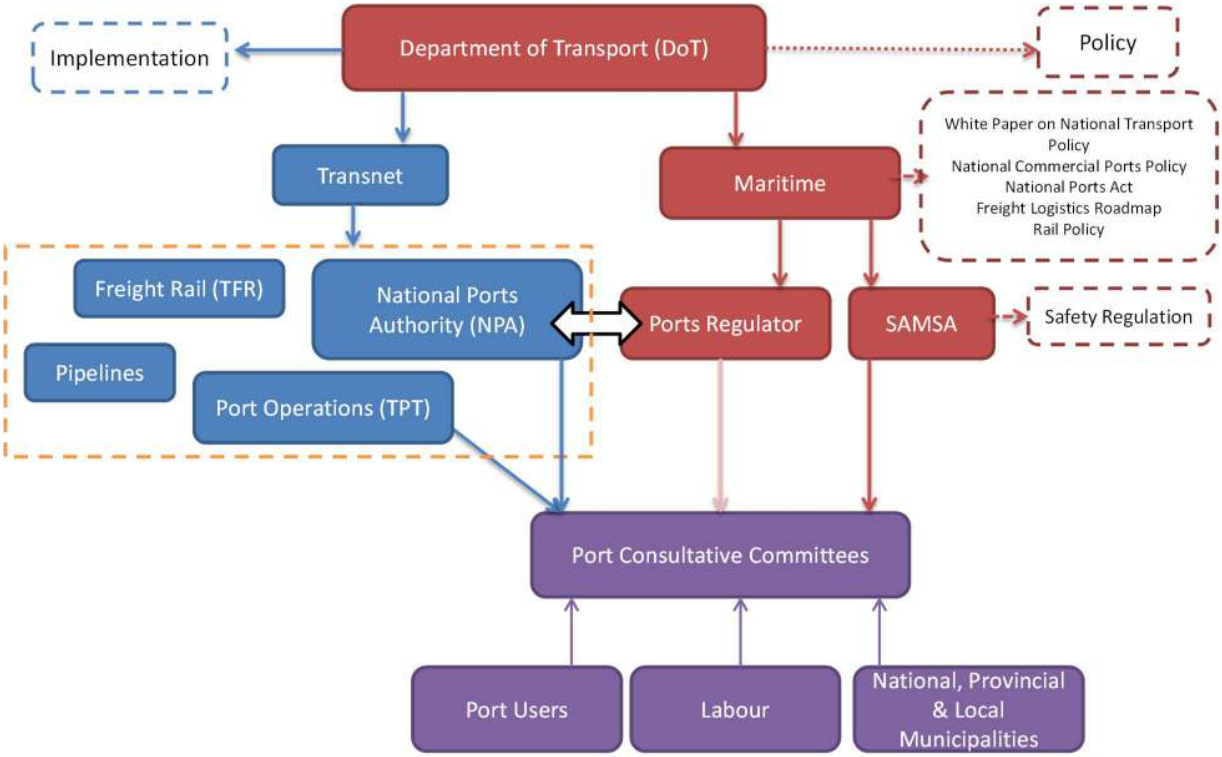
A landlord port is a public port governance model where the port authority owns the basic infrastructure, such as land and access channels, and leases it to private operating companies for long-term concessions. These private operators are responsible for developing, investing in, and maintaining the terminal superstructure, equipment, and cargo-handling operations. This model is intended to balance public oversight with private sector efficiency, by having the public sector focus on infrastructure and regulation while private entities manage daily operations through concession agreements.

Transnet also operates port terminals, owns rail infrastructure and rail operating activities, and runs pipelines. It is wholly owned by the state, with the Department of Transport acting both as custodian of policy and as shareholder and was established by the Legal Succession to the South African Transport Services Amendment Act, No. 9 of 1989. Economic regulation of the NPA is undertaken by the Ports Regulator, and safety regulation of the

[1] Of which eight are operated commercially.

maritime sector as a whole is undertaken by the South African Maritime Safety Authority (SAMSA). Figure 1 below illustrates the structure of the sector.

Figure 1: Entities in the Ports Regulation Space



Source: Own extrapolation

2.1 Legislative and policy framework

The introduction of regulations in South Africa's port system is intended to address persistent bottlenecks and inefficiencies. Regulatory frameworks across various sectors aim to correct market failures by promoting affordable pricing, enhancing operational performance, and ensuring safety.

The overarching framework for governance of economic activity in the ports system in South Africa is the National Ports Act, no. 12 of 2005, which was developed in response to the National Commercial Ports Policy of 2002. The National Ports Act has since been amended by the Economic Regulation of Transport Act, no. 6 of 2024, and the Economic Regulation of Transport Amendment Act, 2025; within a policy framework which has been further

developed by the Freight Logistics Roadmap 2023 and the revised White Paper on National Transport Policy 2021.[2] Further detail is provided below on the following key pieces of legislation and policy:

- The Regulator is subject to the laws of the Republic of South Africa with particular attention drawn to the following:
- The Constitution of South Africa, 1996;
- The Public Finance Management Act;
- The National Ports Act, 12 of 2005, The Economic Regulation of Transport Act, 6 of 2024, which establishes the Transport Economic Regulator;
- The South African Maritime Safety Authority Act, 5 of 1998, which establishes SAMSA; and
- The planned structural reform program, as set out in the Freight Logistics Roadmap 2023

2.1.1 National Ports Act, 12 of 2005 - the National Ports Authority

The NPA is established in terms of Chapter of the National Ports Act, and the Act specifies that all ports fall under the jurisdiction of the Authority. As per Section 11 (1) of the Act, the main function of the Authority is to own, manage, control and administer ports to ensure their efficient and economic functioning, and in doing so the Authority is required to, amongst others:

- Regulate and control seaport access;
- Plan, provide, maintain and improve both port infrastructure and marine services. This includes providing dredging, lighthouses, aids to navigation, ship repair and marine operations such as tug, berthing and pilotage services;
- Prepare and update a port developmental framework plan (PDFP) for each port periodically, to reflect TNPA's policy for port development and land use within such port;
- Promote, develop, and control land use within these ports, as landlord of South Africa's ports; and
- Undertake activities that encourage and facilitate the development of commercial trade, for the economic interest of the national economy.

Section 11(1)(g) further provides the NPA with powers to regulate a number of areas of port activity, as follows:

> *S11(1)… in doing so the Authority must-*
>
> *(g) regulate and control-*
>
> *(i) navigation within port limits and the approaches to ports;*

[2] https://www.gov.za/sites/default/files/gcis_document/202205/46422gen1050.pdf

(ii) the entry of vessels into ports, and their stay, movements or operations in and departures from ports;

(iii) the loading, unloading and storage of cargo and the embarkation and disembarkation of passengers;

(v) off-shore cargo-handling facilities, including navigation in the vicinity of such facilities;

(vi) pollution and the protection of the environment within the port limits;

(vii) the enhancement of safety and security within the port limits;

Section 3 of the Act envisages the incorporation of the NPA as a company. In practice this section of the legislation is yet to be implemented, and thus the NPA still functions as an unincorporated division of the wider Transnet group. Substantial progress has been made towards realization of this goal following the publication of the Freight Logistics Roadmap. This will be discussed in more detail in section 2.1.4.

2.1.2 National Ports Act, 12 of 2005 - the Ports Regulator

The Ports Regulator is established as an independent regulatory body in terms of Chapter 5 of the National Ports Act, and specifically though the promulgation of Section 29 of the Act in 2007. The main functions of the Regulator, as stipulated in Section 30 (1) of the Act are to:

- Exercise economic regulation of the ports system in line with Governments strategic objectives;
- Promote equity of access to ports and to facilities and services provided in ports;
- Monitor the activities of the Authority to ensure that it performs its functions in accordance with the Economic Regulation of Transport Act, 6 of 2024

The promulgation of the Economic Regulation of Transport Act, no. 6 of 2024 ("ERTA"), marks a significant shift in South Africa's transport regulatory landscape. The Act establishes a single Transport Economic Regulator ("TER") to oversee economic regulation across all transportation modes i.e., road, rail, maritime, and aviation. Unlike the National Ports Act, which focused primarily on port infrastructure, the 2024 Act applies broadly to all entities, facilities, and services within the transport sector. TER[3] aims to prevent monopolistic pricing, promote fair competition, and ensure transparent, coordinated regulation.

Schedule 1 of the ERTA provides for the transition of the Regulator into the Transport Economic Regulator (TER) established by the ERTA, repeals sections 29 to 45 of the National Ports Act and amends a number of other sections. Errors in Schedule 1 have delayed it taking effect and have since been addressed by the Economic

[3] https://www.nortonrosefulbright.com/en-za/news/e624c16d/economic-regulation-of-transport-act-6-of-2024-a-new-era-for-south-africas-transport-sector

Regulation of Transport Amendment Act, no. 10 of 2025. While this amendment act has been assented to by the President, it is yet to be promulgated. Promulgation is effectively the final legal step before transition into the TER occurs.

The immediate effect of transition on stakeholders is likely to be relatively minor. Schedule 2 of the ERTA establishes the continuation of tariffs in force at the effective date of transition, and makes provision for the general preservation of regulations, rights, duties, notices and other instruments in terms of any provision of a repealed law. In effect the current regulatory framework, as set out in the National Ports Act Directives, together with the Tariff Methodology and Strategy and associated instruments, will continue in force until replaced.

Over the longer term, it is anticipated that the ERTA will improve regulatory oversight in several ways, including the following:

- The TER will have access to more resources through a more independent funding model
- The ERTA establishes a separate appeals body, the Transport Economic Council ("TEC"), which will improve the independence of this function
- Amendments to section 56 and 57 of the National Ports Act will require the TER's approval of licenses or agreements issued to parties related to the NPA, as well as giving the Regulator more power to determine the conditions for fair, equitable, transparent, competitive and cost-effective operation of the market

It is also likely that the fact that the TER covers multiple modes of transport will improve the ability of the regulator to facilitate intermodal coordination.

The ERTA gives the TER jurisdiction over the NPA. Regulatory oversight of terminals is then somewhat extended by the amendments to the National Ports Act noted above. The ERTA does however include a mechanism which will allow the jurisdiction of the TER to be increased without legislative amendment being required. Section 4 allows jurisdiction to be extended if the Regulator can prove that the preconditions for efficiency and cost-effectiveness do not exist in the market concerned, and thus that economic regulation is required to improve efficiency. However, the legislation sets a substantial burden of evidence on the Regulator to meet this standard, via conducting a rigorous Market Inquiry.

2.1.3 South African Maritime Safety Authority Act, 5 of 1998

The South African Maritime Safety Authority ("SAMSA") is established by the South African Maritime Safety Authority Act, 5 of 1998, with the following objectives:

> *S3(a) to ensure safety of life and property at sea;*
>
> *(b) to prevent and combat pollution of the marine environment by ships; and*
>
> *(c) to promote the Republic's maritime interests*

The SAMSA Act then designates SAMSA as the agency responsible for administering a number of additional pieces of legislation, which substantially extends the mandate of SAMSA in the maritime sector. This includes the following:

- Merchant Shipping Act, 1951
- Marine Traffic Act, 1981
- Marine Pollution (Control and Civil Liability) Act, 1981
- Carriage of Goods by Sea Act, 1986
- Marine Pollution (Prevention of Pollution from Ships) Act, 1986
- Marine Pollution (Intervention) Act, 1987
- Maritime Zones Act, 1994
- Wreck and Salvage Act, 1996
- SAMSA Levies Act, 1998
- Ship Registration Act, 1998

2.1.4 Structural reform – the Freight Logistics Roadmap

In recent years, significant underperformance in the freight logistics system has left South Africa unable to take advantage of recent commodity price booms and has led to significant losses in export revenue, particularly in the iron ore, manganese and coal export trade. It is estimated that, since 2010 South Africa has lost an estimated USD 26.7 billion in iron ore and coal exports.[4] In order to address these major policy issues, the Department of Transport has initiated a program of structural reform in the logistics sector, as set out in the Freight Logistics Roadmap 2023.

[4] Freight Logistics Roadmap 2023

The problem definition set out in the Roadmap identifies three underlying structural problems in the freight logistics system, as follows:

- **Vague and often unfunded mandates**: while the rail network has required subsidization to support its scope, direct subsidization has not been provided, and instead Transnet was permitted to rely on its highly profitable ports activities to make up the shortfall. This has had undesirable consequences for ports prices
- **Regulation of essential facilities** in the ports and the rail systems has been insufficient, and poor outcomes have been exacerbated by the model of vertical integration in rail and ports. As stated in the Roadmap, vertical integration "has to a large extent prevented competitive forces from reaching these markets, preventing efficiency gains and limiting private investment in operations."
- **Governance failures**, particular during the state capture era, have also had a significant impact on sector outcomes

The introduction of the ERTA and the TER are core to the structural reform program set out in the Roadmap, as this will help to directly address the regulatory and governance issues which have contributed to the performance crisis. In the ports sector, the most important component of the structural reform program is however the planned incorporation of the NPA. The Roadmap summarises the problems associated with the current market structure as follows:

> *An underlying cause of weak port performance is the lack of independence between TPT, TFR and TNPA. The result is that the costs of inefficiency can be passed on to customers. TNPA is unlikely to play an effective role as an independent ports authority in terms of penalizing TPT for not meeting service standards, because TNPA and TPT are currently divisions of the same company and report to the same board, and there is no independent body for port users to ensure TPT compliance with standards. Similarly, it is difficult for TNPA to enforce strict rules and guidelines on late export container arrival from TFR, which is also a cause of delay in the loading of ships. There is a need for a National Ports Authority that can credibly commit to introducing competition to TPT, and hold TPT to contracted performance standards to address the underlying cause of inefficiency. This is particularly the case as greater private sector participation is introduced in terminal operations.*

Section 3 of the National Ports Act enables the incorporation of the NPA,[5] but practical complexities as regards the potential impact on the rest of the Transnet group have to date prevented its implementation. The goal of the

[5] https://www.tips.org.za/images/REB_Q2_2021_Briefing_note_Transnet_National_Ports_Authority.pdf

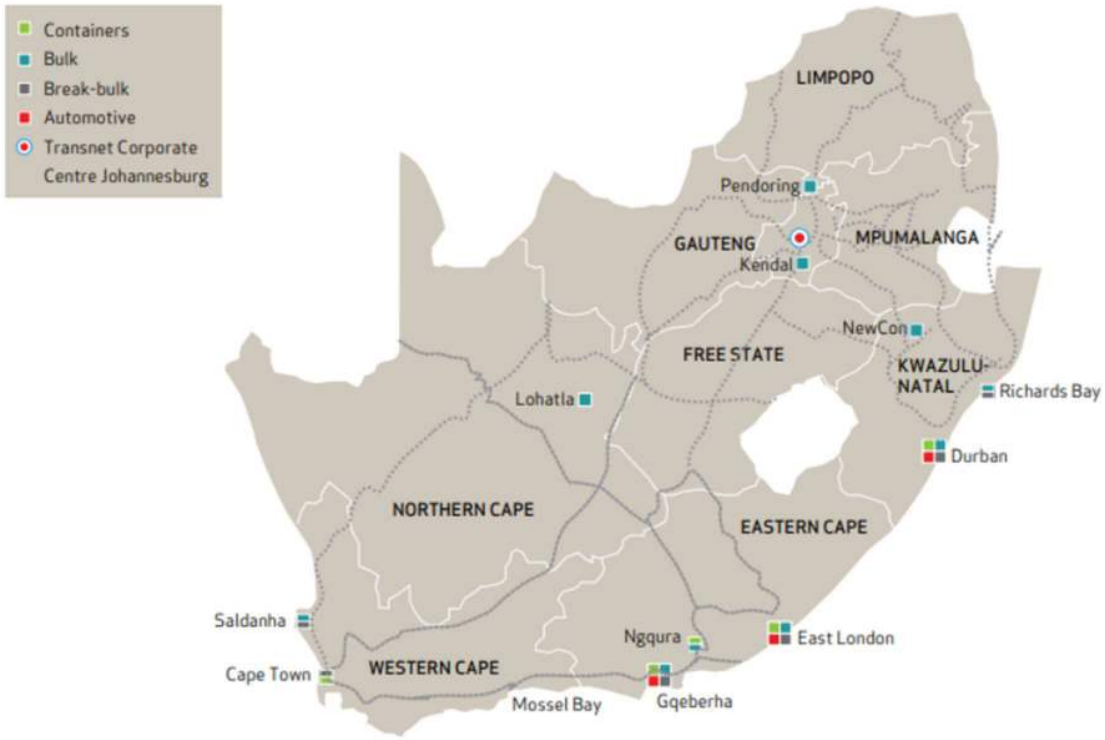
Roadmap is now to proceed with this implementation, and a number of steps have already been made towards this goal. Incorporation will be accomplished in accordance with the following principles:

- The National Ports Authority will be the landlord of the South African ports and will own all the land and the port infrastructures within the port estates
- Greater private sector involvement in operations will be sought through leases and concessions
- The allocation of leases or concessions will be open to competitive bidding; and the bidding process will be transparent and based on a set of clearly stated objectives/targets, criteria and measurable deliverables.

3 National Ports Authority

The National Ports Act defines the nine ports of Richards Bay, Durban, East London, Ngqura, Port Elizabeth, Mossel Bay, Cape Town, Saldanha Bay, and Port Nolloth as falling under the jurisdiction of the NPA. Of these nine ports, eight are operated by the Authority as commercial ports. The ninth is Port Nolloth, which is located in the North-Western region of South Africa, and is operated by De Beers to transfer parts and supplies to vessels carrying out offshore mining. Figure 2 below indicates the location and main freight handled by the commercial ports.

Figure 2: Seaport economic positioning



Source: NPA submissions

The revenue of the NPA is derived from leasing of port infrastructure, provision of marine services (including dredging, aids to navigation, ship repairs, marine operations and pilotage), and cargo dues. To fulfil their strategic role in South Africa's global trade, domestic ports operate on a systemwide basis and are complementary in nature, with port operating cargo based on its geographic location, its logistic network, its infrastructure and operational capacity.

The table overleaf presents a brief overview of the Authority's financial performance for the 2024/25 financial year. As shown, the NPA generated approximately R14.7bn in the last financial year from marine revenue and rental property, with the majority of income being generated from the Authority through cargo dues and lease revenue.

Table 1: NPA financial metrics

R million	2024/25
NBV Assets	R86 235,7
Revenue	R14 727,1
Operating Expenditure	R6 161,1
EBITDA	R8 566,0
EBITDA Margin	58,2%
Total comprehensive income	R5 512,5
Net Profit Margin	37,0%
Interest/finance costs	R374
NPA Allocated Debt	R4 873,8

Source: NPA data, own extrapolation

The figures below present a breakdown of the average revenue and operating expenditure contribution per port for the review period. As can be seen, approximately 78% of NPA revenue and 71% of its operating expenditures derive from the three largest ports, namely Durban, Cape Town and Richards Bay.

Figure 3: 5 year average revenue per port

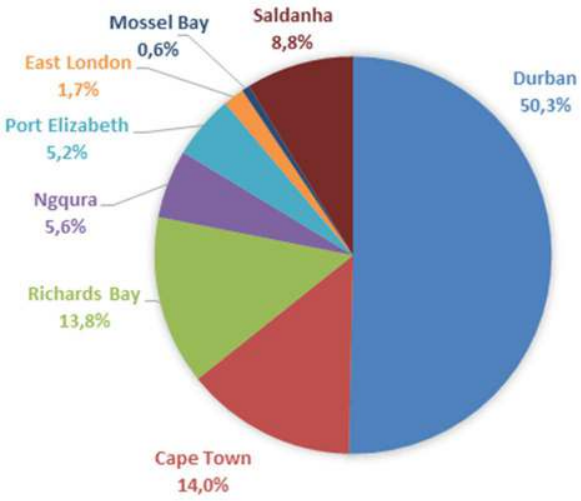
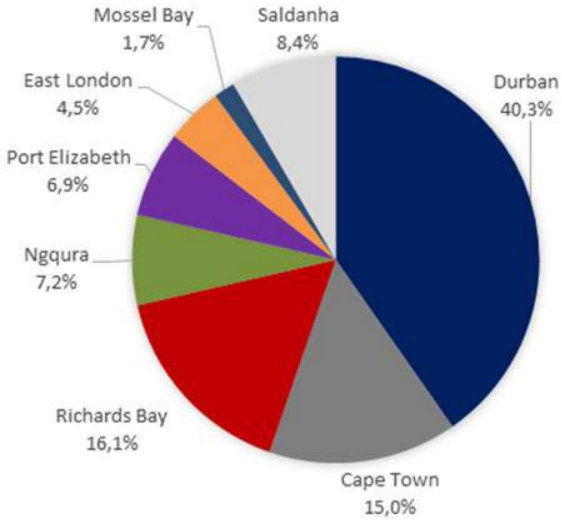


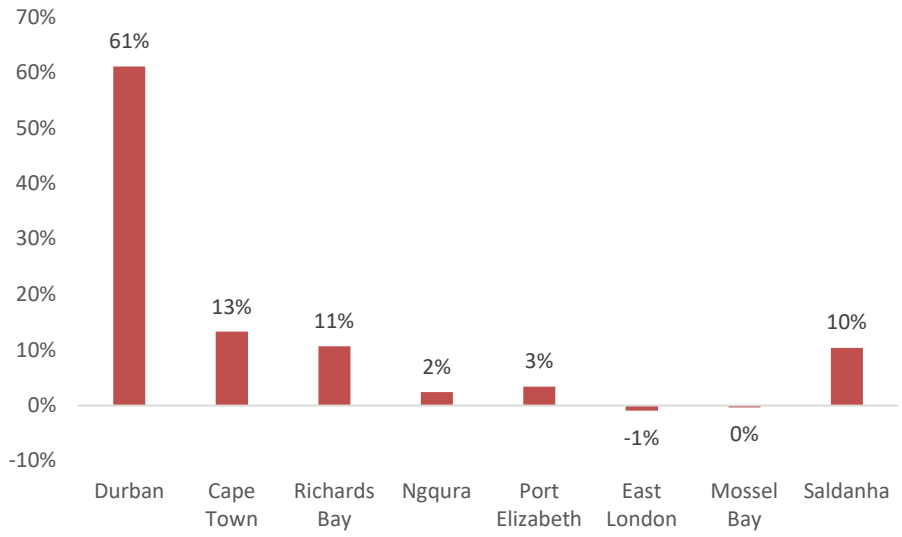
Figure 4: 5 year average operating expenditure per port



Source: NPA data, own extrapolation

With the larger ports generating proportionally less of the operating costs of the NPA, the level of profitability of these larger ports is as a consequence higher. As shown in the figure overleaf, Durban generates well over half of profits in the ports system and has on average comprised 61% of NPA profits over the five-year period. In strong contrast, East London and Mossel Bay have sustained losses annually over the period. These two ports have now experienced ten and eight consecutive years of losses respectively.

Figure 5: Average operating profit contribution per port, 2021-2025



Source: NPA data, own extrapolation

The impact of the COVID-19 pandemic on port profitability was substantial, with operating profits for the NPA as a whole declining approximately 20% from 2020 to 2021. By 2024 profits had recovered to pre-epidemic levels.

In the period under review, the Authority has invested approximately R8.8 billion in port infrastructure over the eight commercial ports. Of the total capital expenditure, 37% was incurred at the Port of Durban, 23% at Ngqura, and approximately 11% each in Cape Town and Richards Bay. Key CAPEX expenditures were associated with the replacement and refurbishment of the Authority's marine fleet; the upgrade of critical infrastructure in dry dock ship repair facilities in Durban and Cape Town; the upgrade of liquid bulk facilities; and the upgrade of road and rail infrastructure at ports.

Table 2: Net book value of Authority's assets by port (R million)

R million	2021	% of total	2025	% of total	5 year actual investment	% of total
Durban	29 826,80	38,5%	33 068,25	38,3%	3 241,44	36,7%
Cape Town	10 976,56	14,2%	11 928,36	13,8%	951,80	10,8%
Richards Bay	13 751,02	17,8%	14 713,05	17,1%	962,02	10,9%
Ngqura	10 082,36	13,0%	12 130,72	14,1%	2 048,36	23,2%
Port Elizabeth	4 586,17	5,9%	4 925,39	5,7%	339,22	3,8%
East London	2 692,38	3,5%	3 069,86	3,6%	377,48	4,3%
Mossel Bay	471,04	0,6%	510,11	0,6%	39,07	0,4%
Saldanha	3 209,91	4,1%	3 322,37	3,9%	112,46	1,3%
TOTAL	**77 391,45**		**86 235,66**		**8 844,21**	

Source: National Ports Authority: 2025

3.1 Port of Richards Bay

Situated on the eastern coast of South Africa, the Port of Richards Bay was developed in 1976 primarily for the export of coal. The port is linked via rail to the Mpumalanga province and the Gauteng province, occupies an area of approximately 3 773ha and is equipped with specialised infrastructure for larger vessels. Separated into three precincts, the Newark Precinct is utilised for waterfront activities, including the small craft harbour and the repair quay; the Bayview Precinct for the handling of dry bulk and breakbulk cargo; and the South Dunes precinct for the handling of liquid bulk, as well as being the location of the RBCT coal terminal.

Figure 6: Port of Richards Bay



Source: National Ports Authority

The port has a total of 22 berths, as shown in the table below. While the bulk of cargo handled is coal, the Port also moves other dry bulk (woodchips / petroleum / coke / alumina / sulphur), containers, break bulk, and liquid bulk in the form of chemicals. The port has been identified as a possible LNG facility for future years and the viability thereof is being explored. Although ship repair is not a primary function of the port, a repair quay able to accommodate vessels up to 50 000 DWT is available, with an average of 33 vessel calls per annum.

Table 3: RCB infrastructure

Terminal	No. of Berths	Berth length	Berth Draft	Vessel Size
Break Bulk	6	820m	15.2 - 19m	65 000 – 150 000DWT
Dry Bulk: Coal	7	1 863.8	19 - 21m	150 000 DWT
Dry Bulk: Other	7	1 840m	14,5m - 19m	65 000 DWT - 150 000 DWT
Liquid Bulk	2	550m	14m	50 000 DWT - 75 000 DWT

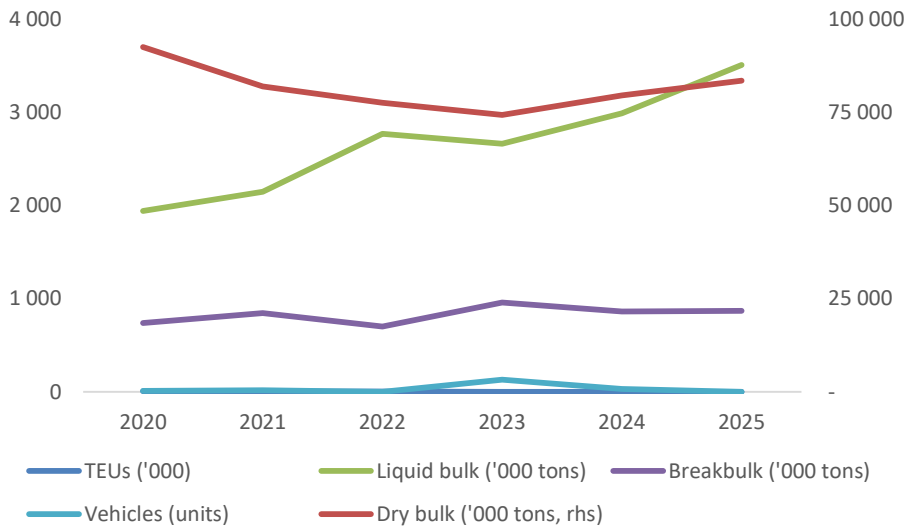
Source: NPA

The installed capacity in the port has not changed over the last five years, with dry bulk capacity at 112 million tons and breakbulk capacity at 8,2 million tons. Of the total dry bulk capacity, coal constitutes 91 000 tons and 'other' constitutes 21 000 000 tons; which is insufficient according to the Authority's volume forecasts. The planned addition of two berths and conversion of one berth will increase this capacity to 40,4 million tons.

Containers are handled at the break bulk terminal (multi-purpose terminal), with an installed capacity of 50 000 TEUs. According to the National Ports Plan of 2019, either 5 or 6 vessels may be accommodated at the break bulk berths due to the growth in vessel sizes.

As shown in the figure overleaf, the majority of volumes handled through the port are dry bulk, with more than half of that dry bulk comprising coal exports. Dry bulk volumes decreased through 2023, associated with a crisis in rail and ports performance, and then began to recover in 2024. Liquid bulk volumes have increased substantially, and there have also been small increases in breakbulk. The port does negligible volumes of vehicles and containers, but a specialised container handling facility operated by terminal operator Grindrod Eyamakhosi is planned by 2027/28.

Figure 7: Richards Bay cargo volumes



Source: NPA, own extrapolation

Depreciation and amortisation comprised 42% of total expenses in the last five year period, followed by personnel costs (29%) and fuel costs at 5%. Maintenance expenditures have increase substantially since 2021, although it should be noted that they fell to close to zero in 2023.

Figure 8: 5 year average of operational expenses

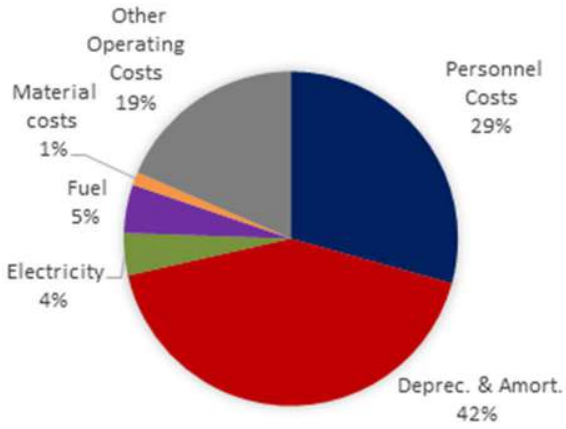
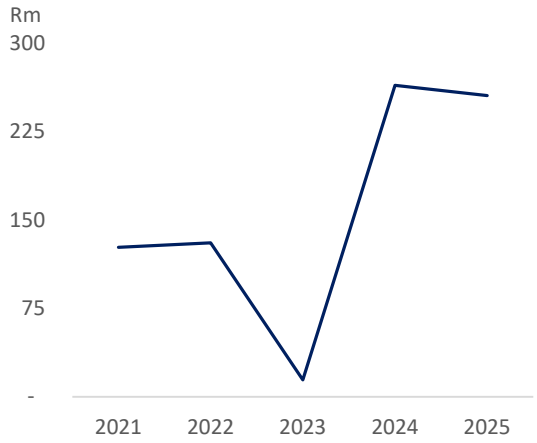


Figure 9: Maintenance expenditures



Source: NPA data, own extrapolation

3.2 Port of Durban

The Port of Durban was developed from a natural bay, protected by a sand dune (bluff). The port spans a length of 21km whilst occupying an area of 1 850ha. Serving the hinterland of Kwa-Zulu Natal, Gauteng, and the general South African economy, the Port of Durban is one of the busiest ports on the African continent, and is the largest and busiest port in South Africa (as well as the sub-Saharan region).

Figure 10: Port of Durban



Source: NPA, own extrapolation

The port is made up of 5 precincts and 58 berths, of which 40 are in operation. These precincts are as follows:

- Maydon Wharf: breakbulk and dry bulk
- Point and Leisure: passengers, breakbulk, car terminal
- Bayhead and Ship-Repair
- Island View: liquid bulk and dry bulk
- Container precinct.

Table 4: Durban infrastructure

Cargo Type	No. of Berths	Total Berth Length	Berth Draft
Containers	7	2 108m	8,2m - 12,3m
Dry Bulk	12	1 610m	8,6m - 10,8m
Break Bulk	11	3 248m	5,1m - 13,7m
Liquid Bulk	7	1 965m	8,7m - 12,5m
Ro-Ro	3	1 381m	10,1m - 10,6m

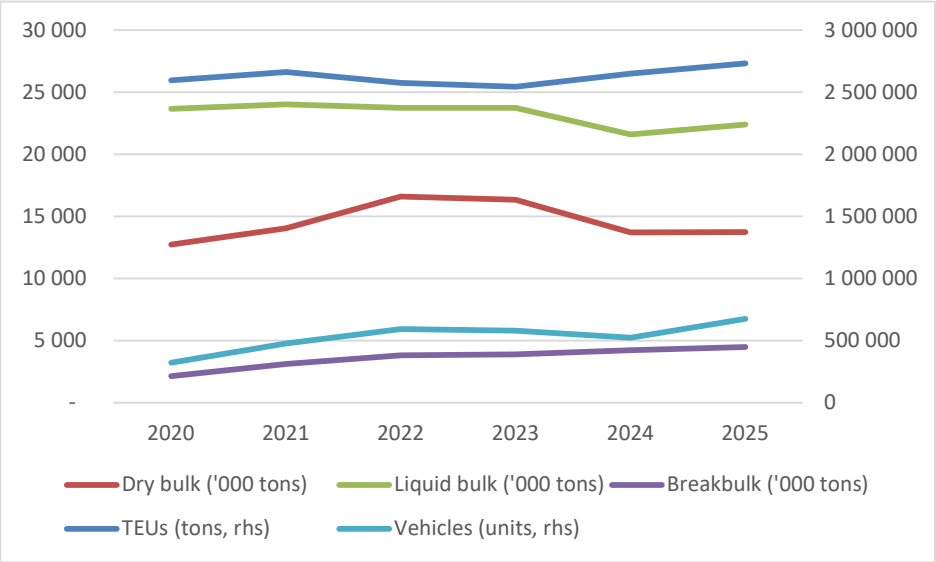
Source: National Ports Authority

Dry bulk cargo is handled at 9 berths situated between the Bluff, Maydon Wharf, and the Island View Precinct. Maydon Wharf accommodates vessels up to 35 000 DWT, and the Bluff and Island View accommodate vessels up to 55 000 DWT

With an installed capacity of 10,7 million TEUs, break bulk at the Port of Durban is handled across 11 berths situated between Maydon Wharf, the Point, T-Jetty, and Island View. The largest vessel that can be accommodated within this infrastructure is 55 000 DWT.

Figure 11 below illustrates trends in cargo volumes at the port of Durban. TEU volumes are slightly up in 2025, while liquid bulk volumes have been somewhat depressed in 2024 and 2025. Dry bulk volumes are also down, while there has been substantial growth in breakbulk, and to a lesser extent in vehicles.

Figure 11: Durban cargo volumes



Source: NPA, own extrapolation

In the five years to 2025, depreciation averaged 32% of port expenses, followed by personnel costs (31%) and electricity (4%). Maintenance expenditures have been increasing substantially over the period.

Figure 12: 5 year average of operational expenses

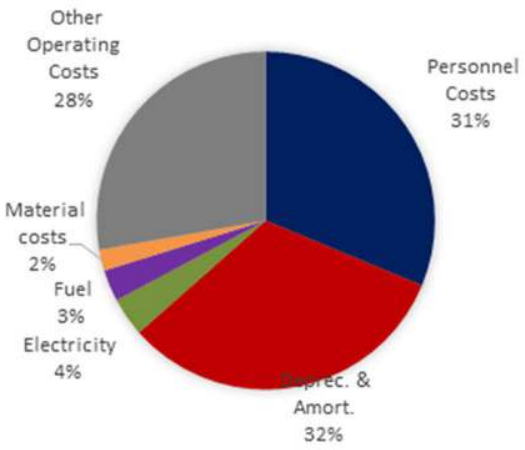
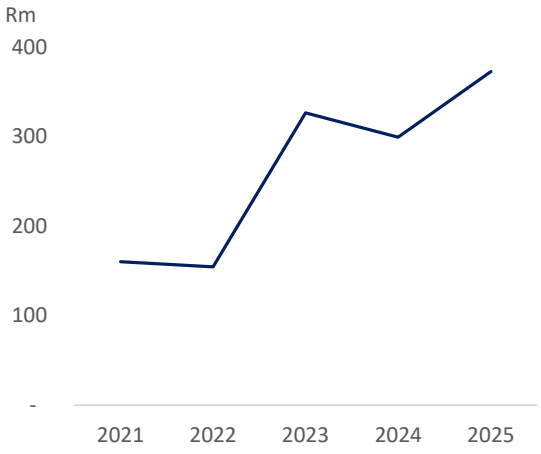


Figure 13: Maintenance expenditures



Source: NPA data, own extrapolation

3.3 Port of East London

The Port of East London is South Africa's only river port, situated at the mouth of the Buffalo River. Its hinterland is the Eastern Cape Region, as well as Southern Free State and Lesotho. Constricted by its surrounding terrain, limited opportunities present themselves for port expansion or expansion of the port's offering.

Figure 14: Port of East London



Source: National Ports Authority

A maximum draft of 10,4m at the entrance channel limits the port's ability to receive larger vessels, with a maximum allowable vessel length of 245m. The port has 11 berths, equipped to handle general cargo, containers, liquid cargo, bulk grain, livestock, and most notably automotive cargo. Located close to the Mercedes Benz factory, the port is focused on the automotive industry in South Africa.

Table 5: East London infrastructure

Cargo Type	Berth	No. of Berths	Berth Draft
Dry Bulk	S,T	2	10,7m
Containers	I, K/L, L/I	2	8,4m - 10,7m
Break Bulk	F, G, K/L, L/I	4	9,1m – 10,4m
Ro-Ro	N/R	2	8,5m – 10,7m
Liquid Bulk	TB	1	10,7m

Source: Transnet Port Terminals

The port is divided into two official precincts, the Eastern Bank precinct and the Western Bank Precinct, which are situated on either side of the Buffalo river. The Gately precinct also serves port operations in the oil and gas industry, however this area lies outside of gazetted port limits. The process to incorporate this precinct into the gazetted port limits is underway.

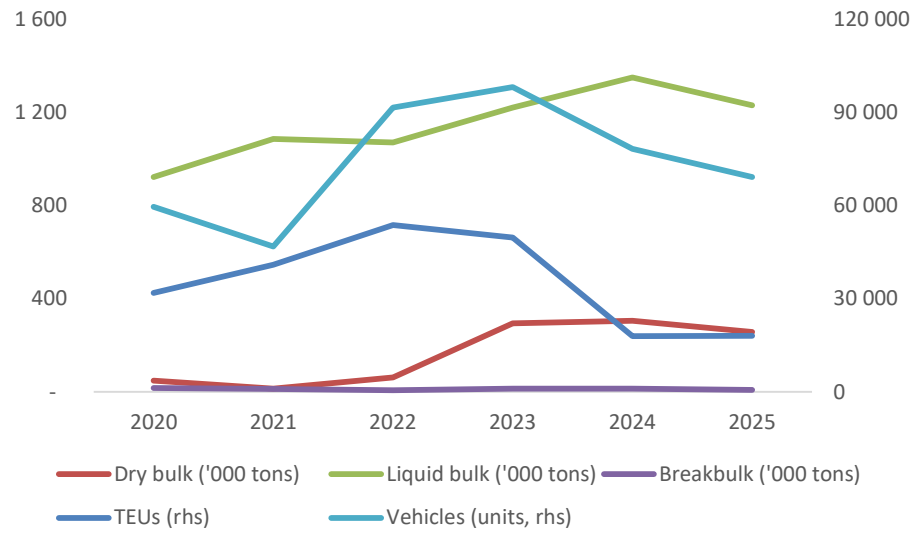
The Multi-Purpose Terminal is located on the East Bank. It is managed by Transnet Port Terminals and cargo handled includes containers as well as coal. The export of livestock is handled as a break bulk operation within the MPT. It is expected that over the short to medium term, there is sufficient capacity to manage forecasted demands and throughput.

On the West Bank of the Buffalo River is the Dry Bulk Terminal and the Automotive Terminal, both managed by Transnet Port Terminals. A grain elevator is located within the dry bulk terminal, which facilitates both the export and import of maize products.

CAPEX plans for the port mainly consist of refurbishment projects as well as renewable energy and projects aimed at improving tourism, i.e. upgrading of waterfront etc.

Figure 15 overleaf illustrates cargo volume trends at the Port of East London. Container volumes are fairly low and have more than halved since 2022. In contrast, there has been sustained growth in dry bulk, and to a lesser extent in liquid bulk. Vehicle volumes peaked in 2023 and have since trended downwards.

Figure 15: East London cargo volumes



Source: NPA, own extrapolation

In the five years ended 2025, depreciation and amortisation comprised 32% of expenses in East London, followed by personnel costs at 44%. There has been somewhat of an increase in maintenance expenditures over time, although it should be noted that maintenance spending fell to negligible levels in 2023.

Figure 16: 5 year average of operational expenses

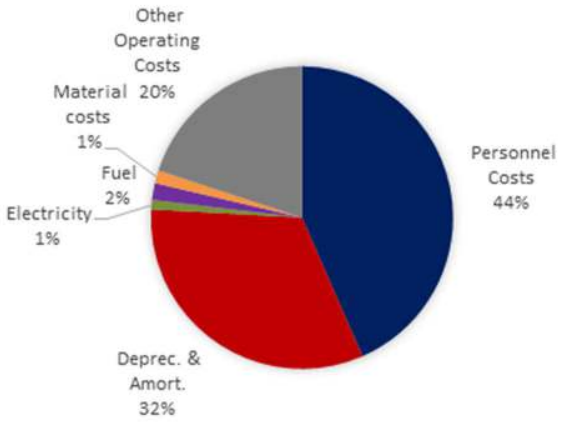
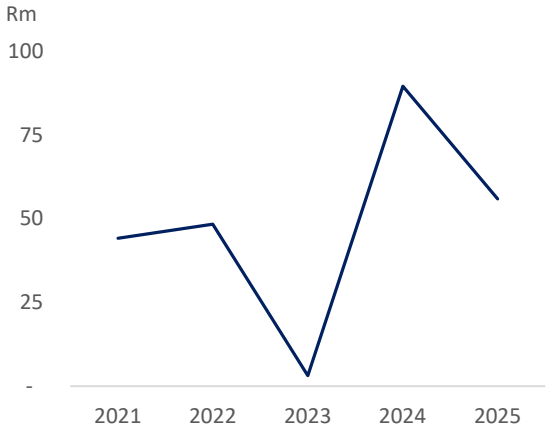


Figure 17: Maintenance expenditures



Source: NPA data, own extrapolation

3.4 Port of Ngqura

The Port of Ngqura is situated in the Eastern Cape, approximately 20km from the Port of Port Elizabeth. Spanning 1 3077 ha, construction of the Port commenced in 2002, and the Port commenced operations in 2009. Established as a deep-water port, the Port of Ngqura serves as a container and transshipment hub and services the Eastern Cape region, South Africa, as well as regional Africa, and was intended to complement the operations of its neighbour, the Port of Port Elizabeth. Challenges to port operations include heavy winds which result in downtime.

Figure 18: Port of Ngqura



Source: National Ports Authority

The Coega Special Economic Zone (SEZ) is located in close proximity to the Port. The SEZ offers opportunities to various sectors for investments and industrialisation including (among others) the metal sector, automotives, chemical manufacturing, and the energy sector.

The port consists of three distinct precincts, as follows:

- The Western precinct (50% of port operations) is dedicated to container handling operations (focussed on transhipment, deep sea trade, and coastwise trade), managed by Transnet Port Terminals.
- The central precinct is a multi-purpose facility which handles abnormal cargo, dry bulk, and liquid bulk cargoes, with landside activities dedicated to the salt industry with the location of salt pans within the port boundaries.
- The Eastern precinct has not been fully developed to date.

Actual CAPEX expenditure for the port in the year to end March 2025 was R68 million, with just over half of that sum going towards investments in tank farm equipment for Berth B100. Future CAPEX plans for the port include the construction of liquid bulk facilities, as well as a manganese terminal, with the intention of moving operations from the Port of Port Elizabeth, where the manganese facility is nearing the end of its lifespan and is due for de-commissioning. News reports suggest that a consortium of manganese producers intend to bid to construct and operate the new terminal.[6]

Featuring two anchorage areas, the Port's entrance channel is 300m wise and 18m deep, with berths ranging from 15,5m to 17,5m deep, thus being able to service very large container vessels.

Table 6: Ngqura infrastructure

Cargo Type	No. of Berths	Berths	Installed Berth Capacity	Theoretical Berth Capacity	Latent Berth Capacity
Containers	4	D100, D101, D102, & D103	1 200 000	2 227 419	748 548
Multi-Purpose	3	B100, C100, C101	6 000 000	7 128 425	1 489 171

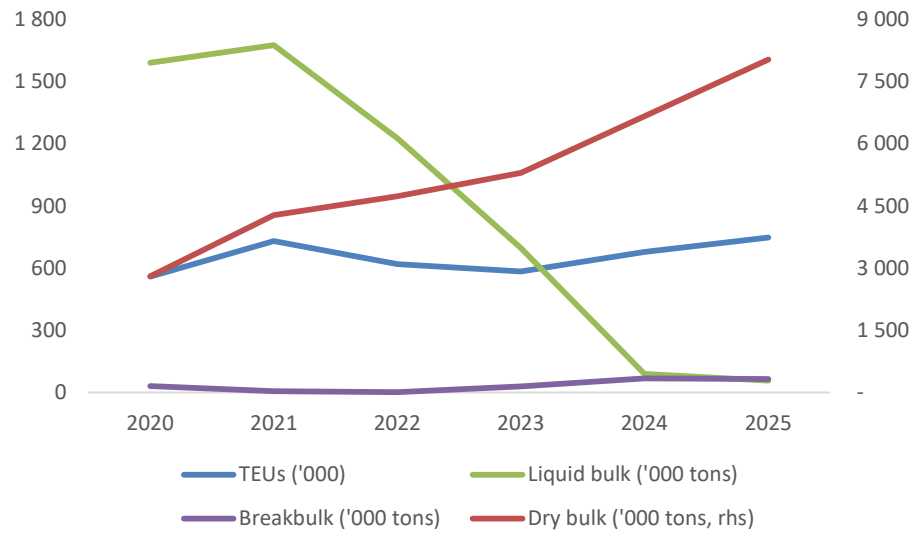
Source: National Ports Authority

The Port of Ngqura is equipped with 4 berths for the handling of containers namely D100, D101, D102, and D103, spanning 1 300m in length and dredged to a depth of 16m. The container terminal is equipped with a total of 8 cranes (Mega-Max Ship to Shore cranes) and occupies 42% (904 734ha) of port land. With a design capacity of 2million TEUs for containers, the current installed capacity is 1,3million TEUs.

As shown in the figure overleaf, liquid bulk volumes shipped at Ngqura have declined very sharply since 2021. Fortunately there have also been substantial increases in dry bulk over the period, and stable container volumes. Breakbulk volumes are minimal.

[6] https://miningfocusafrica.com/2026/03/09/south-african-miners-plan-bid-for-ngqura-manganese-export-terminal/

Figure 19: Ngqura cargo volumes



Source: NPA, own extrapolation

Depreciation comprises 51% of operating costs at Ngqura, followed by personnel costs (30%). Ngqura's infrastructure is of more recent construction than other ports, which should tend to increase the relative size of depreciation and possibly also reduce maintenance expenditures.

Figure 20: 5 year average of operational expenses

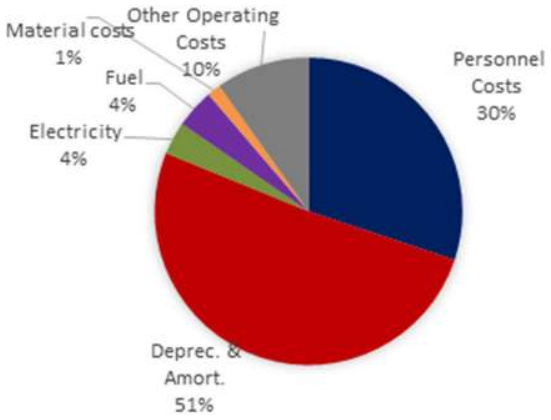
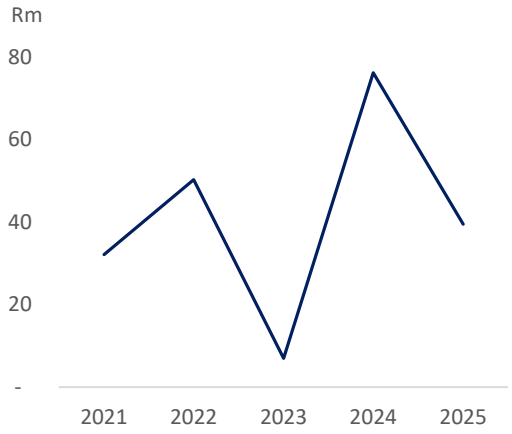


Figure 21: Maintenance expenditures



Source: NPA data, own extrapolation

3.5 Port of Port Elizabeth

The Port of Port Elizabeth commenced operations in 1825 as a multi-purpose port serving the immediate Nelson Mandela Bay Metro, as well as the larger Eastern Cape Region. As a multi-cargo port, the port handles dry bulk (principally manganese from the Northern Cape), liquid bulk, break bulk, Ro-Ro, and containers. Previously positioned as a primary port, it is transitioning in status to complementing the Port of Ngqura whilst maintaining its status as the automotive hub of South Africa.

The port has three main precincts, the Charles Malan Precinct, the Baaken's River Precinct, and the Flemming Street Precinct. The Charles Malan Precinct is home to the Automotive Terminal (Berth 100 and 101) as well as the Container Terminal (Berth 102 & 103), all of which are managed by Transnet Port Terminals. In the long-term the port plans to expand its automotive offering and relocate its container operations to the Port of Ngqura.

The Baaken's River precinct (Southern Precinct) houses the dry bulk and liquid bulk facilities offered by the port, as well as servicing the fishing industry. Dry Bulk is handled at the Bulk Ore Facility, which occupies berths 13 and 14. The NPA plans to decommission this facility and relocate the dry bulk/manganese operations to the Port of Ngqura. In the long term, the plan is to repurpose this land for the servicing of the cruise liner industry. The liquid bulk operations of the port include the handling of petroleum products as well as numerous tank farms. Again, the long term plan is to relocate these operations to the Port of Ngqura. It is envisaged that this berth will be brought closer to land side, in the long term, and the turning basin be expanded.

Berths 8, 9, 10, 11, and 12 are located in the Flemming Street Precinct and are dedicated to multi-purpose operations, including break bulk operations. Break bulk cargo includes steel products, agri-products, the export and import of cement products, as well as fruit handling. The FPT Group terminal is located within this precinct as is the TPT Multi-Purpose Terminal.

Bunker services are provided to the fishing sector at the Port, as well as fish processing plants and aquaculture facilities. The Port also conducts ship repairs, mainly for fishing trawlers.

Recreational facilities within the port include various boat clubs, and yachting facilities, as well as a waterfront. In the long term, the Port will expand its leisure and recreational facilities with the development of cruise liner facilities and expanded fishing facilities.

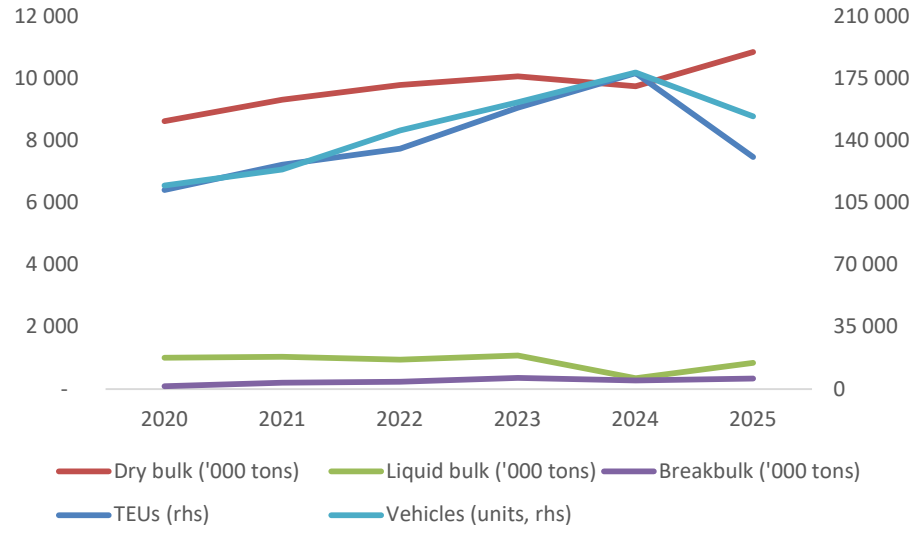
Table 7: Port of Port Elizabeth – infrastructure summary

Cargo Type	No. of Berths	Berth Length	Berth Draft	Installed Berth Capacity	Theoretical Berth Capacity	Latent Berth Capacity
Containers	2	635m	12,2m	200 244	989 440	11 848
Dry Bulk	1	360m	12,2m	6 152 681	9 115 082	595 422
Break Bulk	3	888m	9,6m - 10,8m	9 292 248	10 875 238	5 353 151
Liquid Bulk	1	242m	9,9m	3 000 000	3 000 000	1 973 703
Ro-Ro / Cruise Terminal	1	358m	11m	600 842	600 842	438 788

Source: National Ports Authority

As shown in Figure 22 below, Port Elizabeth has experienced a strong growth in vehicle, dry bulk and container volumes in recent years. However there has been a substantial decrease in container and vehicle number sin the last calendar year, and liquid bulk volumes are down over the period.

Figure 22: Port Elizabeth cargo volumes



Source: NPA, own extrapolation

Personnel costs comprise 42% of expenses at Port Elizabeth, followed by depreciation at 38% of operational expenses in Port Elizabeth. Maintenance expenditures are low, and in 2023 in particular were extremely low.

Figure 23: 5 year average of operational expenses

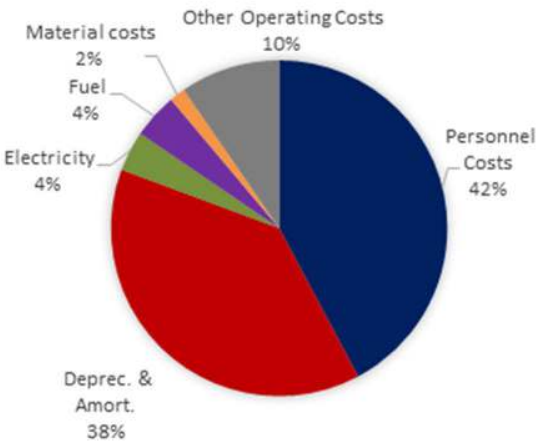
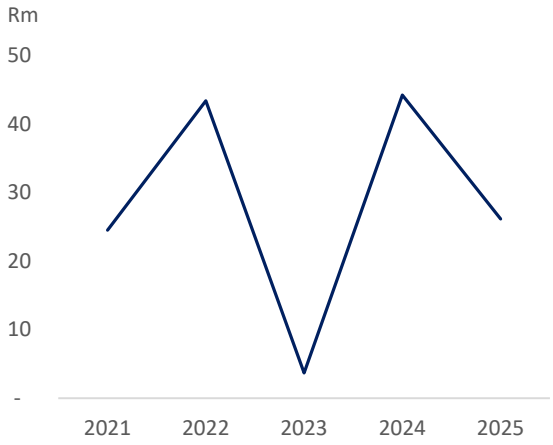


Figure 24: Maintenance expenditures



Source: NPA data, own extrapolation

3.6 Port of Mossel Bay

The Port of Mossel Bay, situated between Cape Town and Port Elizabeth, is the smallest of the commercial ports in South Africa. The port has a total area of 3720 Ha, and is accessible by road and railway networks. While limited in its offerings, the port plays an important role in the petroleum, oil and gas industry, which occupies 45% of the terminal area, and in the fishing industry, which leases 40% of the port land.

Figure 25: Port of Mossel Bay



Source: National Ports Authority

The entrance channel to the port is dredged to a depth of 7m with a breath of 120m. The Port is equipped with five berths in total and two off-shore mooring facilities. With an installed capacity of 8 million TEUs, and only an average of 1.7 million TEUs, the port is not expected to exceed its capacity limitations in the future. The port is mainly used for liquid bulk, with 99% of its operations dedicated to liquid bulk exports.

Divided into three precincts, the port handles break bulk cargo, ship repair facilities, and liquid bulk facilities, linked to its two off-shore mooring facilities. Quay 4 is the multi-purpose precinct which houses various recreational facilities, services the fishing sector, as well as houses liquid bulk storage facilities for the oil and gas sector. Vincent Jetty located in the central region of the Port services the fishing industry, as does the Lower Level Wharf Precinct.

Located within port limits are two mooring facilities, a conventional buoy mooring facility as well as a single point mooring facility. Both facilities connect to the tank farms located landside.

The tourism sector plays a large role in the port and influences its services. In 2022, the Port gained Port of Entry Status, thus increasing vessel calls from the cruise liner industry, contributing to its tourism offerings.

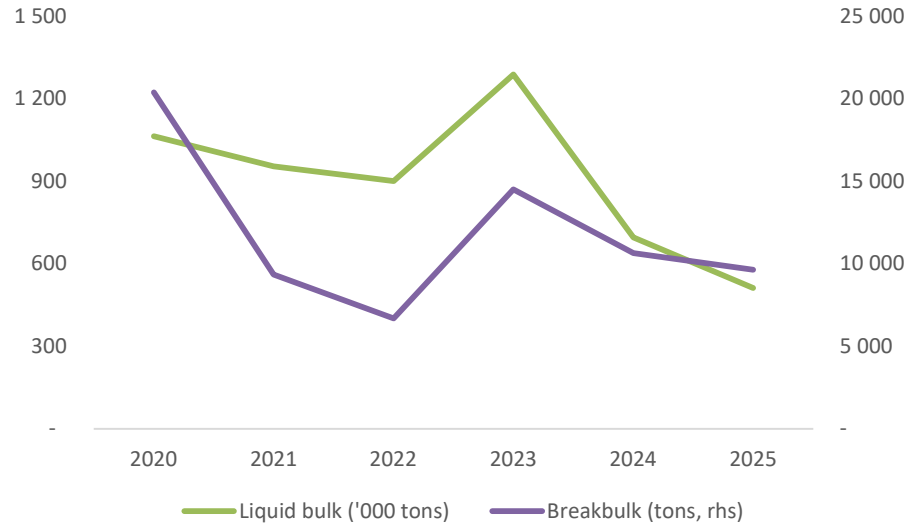
Figure 26: Port of Mossel Bay - infrastructure summary

Precinct	Berth Length (s)	Berth Draft
MPT / Quay 4	265m	6,5m
Vincent Jetty	2 x 143m	3,5m – 5,5
Lower-Level Wharf	483 (total)	1,2m – 5m

Source: National Ports Authority

Mossel Bay transports only liquid bulk and breakbulk cargoes. As shown in Figure 27 below, volumes of both have declined over the period.

Figure 27: Mossel Bay cargo volumes



Source: NPA, own extrapolation

Depreciation comprised 42% of operating costs in the five years to 2025, followed by personnel costs at 38%. Maintenance expenditures are low, and in 2023 and 2024 were extremely low.

Figure 28: 5 year average of operational expenses

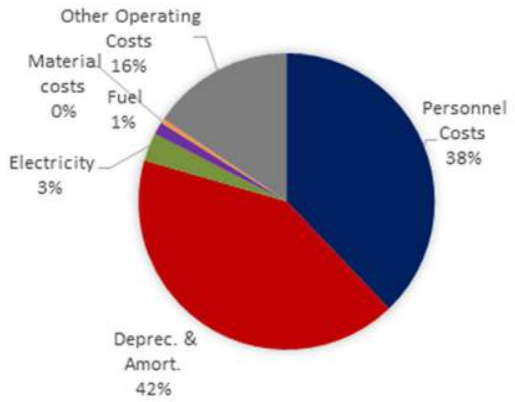
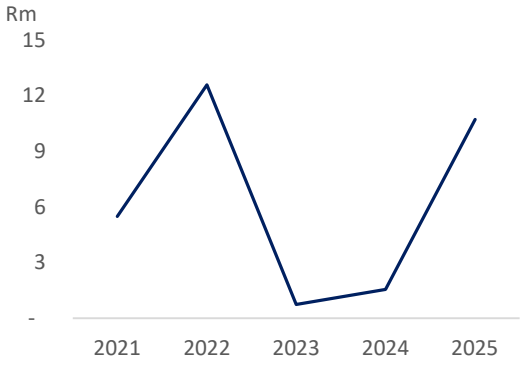


Figure 29: Maintenance expenditures



Source: NPA data, own extrapolation

3.7 Port of Cape Town

Situated in the Western Cape of South Africa, the Port of Cape Town is the third largest in the country, surpassed by the Port of Ngqura and the Port of Durban. Established in 1652, the Port has progressed over time and expanded both its infrastructure and the services offered. Playing an important role in the tourism industry, the Port receives many cruise vessels and the Victoria and Alfred (V&A) basin and waterfront plays a complementary role to this sector and to the Port.

Figure 30: Port of Cape Town



Source: National Ports Authority

The Port of Cape Town serves mainly the Western Cape province hinterland and the general cargo handled includes wheat, maize, fertilizer, fish, fruit, steel, timber, and petroleum and chemicals. The port also provides ship repair services and hosts local and foreign fishing fleets, and other recreational uses. The neighbouring Port of Saldanha Bay handles the dry bulk and liquid bulk cargoes of the region.

Various precincts make up the total port area with the main areas being the Ben Schoeman Dock, the Container Terminal, Duncan Dock, Eastern Mole, South Arm Road, and the Sturrock Dry Dock. The total leased area for the port totals 1,3 million m^2 of which Transnet Port Terminals leases 60% through the Container Terminal and Multi-Purpose Terminal (located in Duncan Dock).

With 18 berths across 5 terminals, the largest vessel which can be accommodated by the Port is 100 000GRT. The depth at the entrance channel is 15,9m when entering the Duncan Dock basin and 14m when entering the Ben Schoeman Dock.

Table 8: Cape Town infrastructure

Cargo Type	No. of Berths	Berth Length	Berth Draft
Containers	4	1 151m	10.7m – 15,5m
Dry Bulk & Break Bulk	5	1 673m	9.0m - 12.2m
Liquid Bulk	4	978m	11,8m – 13,4m
Ship Repair	4	229m	7,9m - 13,7m
Passengers	1	226m	11,2m

Source: National Ports Authority

The Container Terminal, which is operated by TPT, covers an area of 63ha, which is 54% of the port area. It includes four berths, 601 to 604, with a total berth length of 1 151m. The terminal can accommodate vessels up to 100 000GRT.

Duncan Dock houses 5 berths (B/C, D, F, G, H, AND J) and handles both dry bulk and break bulk cargo for the Port., Break bulk is handled at the MPT terminal which is operated by TPT and occupies 22ha of land. This terminal handles a large portion of South Africa's fruit and fish cargo. Dry bulk cargo including wheat, maize, and fertilizer is handled through the same berths, which can accommodate vessels up to 40 000GRT in size.

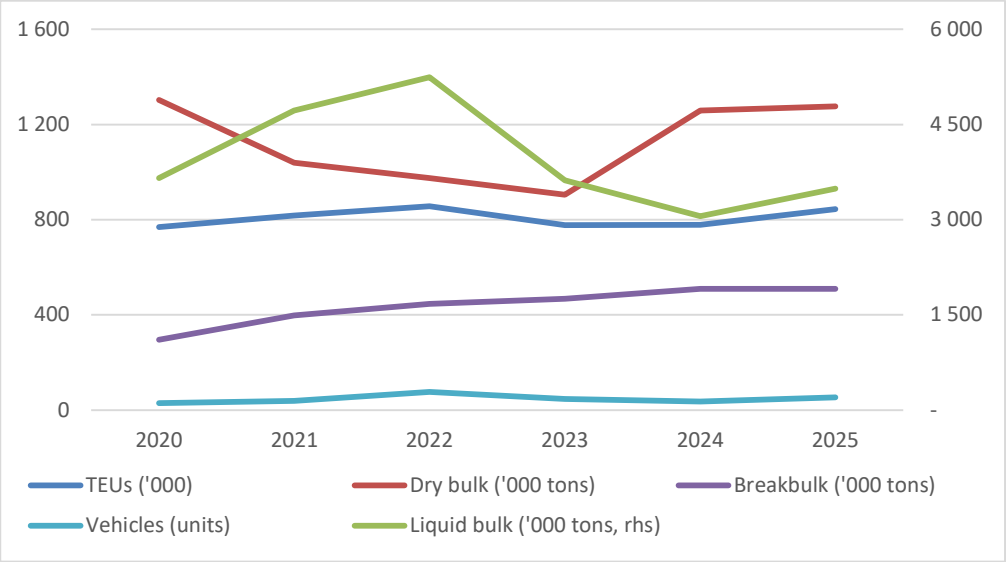
The Eastern Mole 1 & 2 and the Tanker Basin 1 & 2 cover 16ha of land and comprise 4 berths, which makes up the liquid bulk facilities of the port, handling petroleum, chemicals, molasses, and vegetable oil. 40 000GRT is the largest vessel which can be accommodated.

The Port of Cape Town offers both dry ship-repair services and wet ship-repair services. Dry repair services are handled at the Robinson Dry Dock, the Sturrock Dry Dock and a Syncrolift facility, and wet repair services are handled at the Ship Repair Quay which can accommodate vessels up to 49 735GRT.

E-berth located in the V&A Waterfront accommodates cruise vessels. The berth occupies an area of 2,3ha and can accommodate vessels up 48 123GRT.

As shown in the figure overleaf, volumes of vehicles and containers shipped through the port have been fairly steady over the period. Dry bulk volumes dipped into 2023, but have since recovered. Liquid bulk has also declined since a high point in 2022, with limited recovery to date. Breakbulk volumes have increased substantially.

Figure 31: Cape Town cargo volumes



Source: NPA, own extrapolation

Personnel costs comprised 45% of the expenses of the port in the five years to 2025, followed by depreciation (39%). There has been a significant increase in maintenance expenditures over the period.

Figure 32: 5 year average of operational expenses

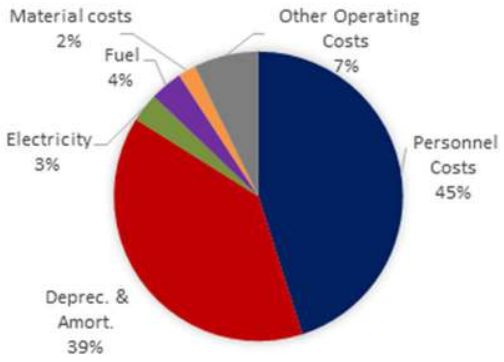
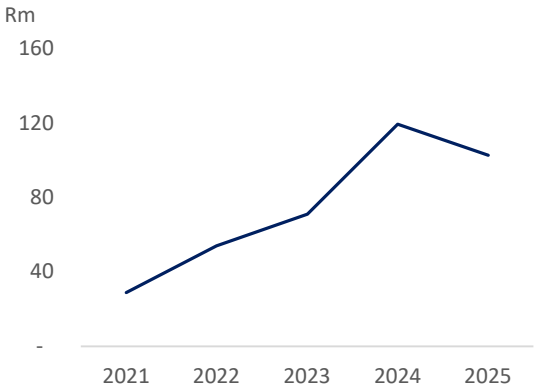


Figure 33: Maintenance expenditures



Source: NPA data, own extrapolation

3.8 Port of Saldanha Bay

Situated on the west coast of South Africa, the Port of Saldanha Bay is a natural deep-water port. The port services the Northern and Western Cape primarily through the export of iron ore and the import of crude oil. The port handles various break bulk cargoes at its multi-purpose terminal, including manganese, steel, granite, minerals, and sands.[7] The port also supports aquaculture farmers.

The Port of Saldanha Bay is made up of 7 berths and one multi-buoy mooring (MBM) facility. The port is split, by a causeway, into two parts; a Big Bay, on the eastern side, housing the iron ore stockyard, and a Small Bay on the western side, where the MBM facility dedicated to the handling of LPG is located. The dry bulk terminals and the liquid bulk terminal are located at the end of this causeway.

Table 9: Saldanha Bay infrastructure

Cargo Type	No. of Berths	Berth Length	Berth Draft
Dry Bulk	2	630m, 630m	21,5m
Break Bulk	4	874m	12,5m -13,5m
Liquid Bulk	1	365m	21,25m
LPG	MBM	N/A	10,4m

Source: National Ports Authority

Two berths are dedicated to the handling of dry bulk (the servicing of iron ore and manganese vessels) occupying an area of 714 734m^2 (69%) with the ability to accommodate vessels up to a length of 350m. These are operated by TPT. The entrance channel of the port is dredged to 23,7m. Both dry bulk terminals have a draft of 21,5m.

With four berths (201, 202, 203, and 204), the break bulk facility of the port, operated by TPT, has both a design and an installed capacity of 8 million tons per annum. Totalling 208 000m^2 of port space (20%), the berths are able to accommodate vessels up to 200m in length and have a draft of 12,5m – 13,5m.

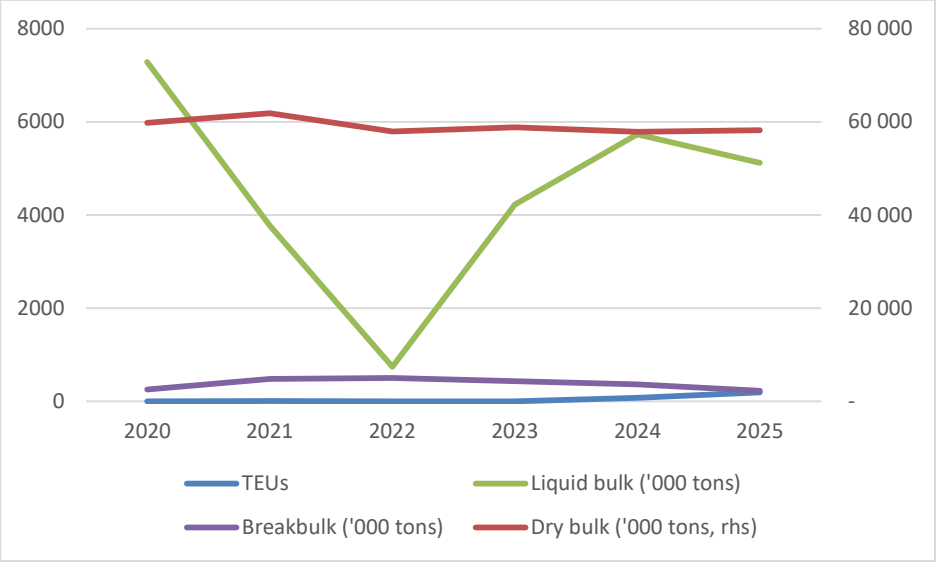
The sole activity of the liquid bulk terminal is the import of crude oil. The 365m long berth has a depth of 21,25m and is able to handle vessels up to 350m. The facility has both a design and an installed capacity of 25 million kl per annum and is approximately 27% of the total installed capacity of the Port.

The MBM facility, dedicated solely to the liquid gas industry, occupies 1% of port space and accommodates vessels up to 180m in length. The facility is connected via both sub-sea and land pipelines to storage facilities which are not located within port limits and are privately operated.

[7] https://www.transnetportterminals.net/Ports/Pages/Saldanha_Multi.aspx

The figure below illustrates cargo volumes at the port over the period. As shown, the port ships minimal quantities of containers, and a fairly small volume of breakbulk. Dry bulk volumes decreased somewhat over the period, and liquid bulk volumes have been quite volatile, possibly associated with disruptions in supplier operations.

Figure 34: Saldanha Bay cargo volumes



Source: NPA, own extrapolation

Personnel costs comprised 39% of operating costs in the five years to 2025, followed by depreciation (36%), and electricity at 10%. Maintenance expenditure has increased substantially in the last two years.

Figure 35: 5 year average of operational expenses

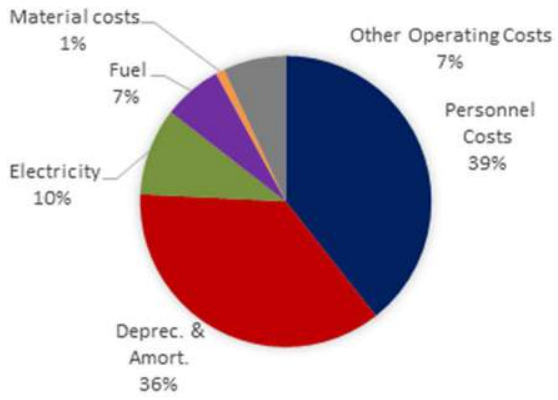
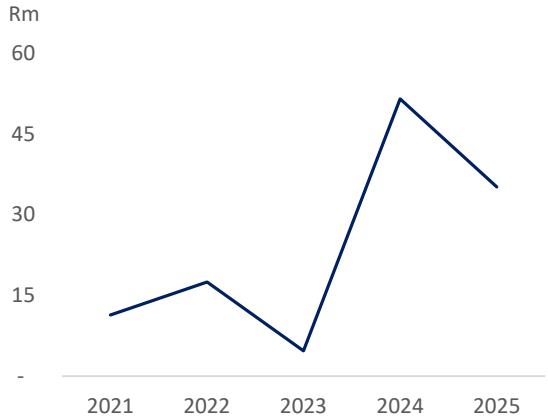


Figure 36: Maintenance expenditures



Source: NPA data, own extrapolation

3.9 Port of Port Nolloth

The Port of Port Nolloth is the smallest of the nine ports under the jurisdiction of the NPA, and is not operated as a commercial port. As a result less data is publicly available on the operations of this port.

Figure 37: Port of Port Nolloth



Source: NPA

The port is located in the North-Western province, less than 100km from the border with Namibia. As shown in the figure above, the infrastructure of the port consists of an L-shaped concrete deck on pile jetty. There is a 67-metre landing quay and a useable area of 1450 m^2.[8]

The port is operated by De Beers Group Services, which has a lease agreement on the port with the NPA. It is principally used as a supply base for De Beers' offshore diamond prospecting activities in Namibia.

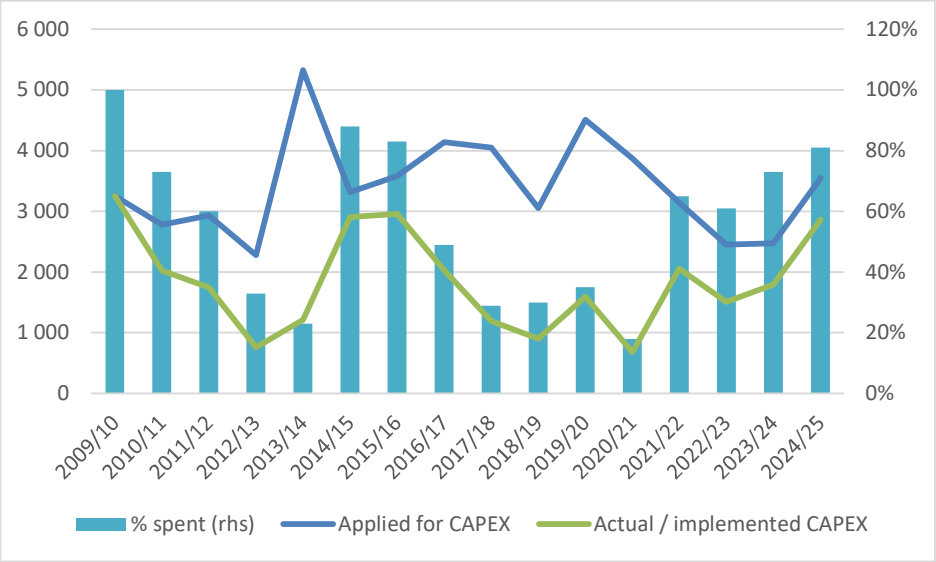
[8] https://africaports.co.za/2019/01/03/transnet-completes-r39-million-refurbishment-project-at-port-nolloth/

4 Port Capacity and Capacity Utilisation

Section 11(1)(b) of the National Ports Act requires the Authority to "prepare and periodically update a port development framework plan for each port, which must reflect the Authority's policy for port development and land use within such port." These port development framework plans ("PDFPs") thus outline how capital has been spent in sustaining and/or increasing capacity in the port system, and how the Authority plans to improve operational efficiencies going forward. Accordingly, the Regulator continuously monitors the Authority's CAPEX programme to ensure that adequate capacity is provided and maintained through appropriate infrastructure investments.

Since the inception of regulation, the Regulator has approved a total of R55 billion in CAPEX, of which only R29.5 billion has been implemented by the Authority. There has been an improvement in implementation of CAPEX in recent years however, with approximately R8,9 billion in capital expenditure incurred over the five years to 2025. Although significant focus has been put on translating CAPEX spent to improved efficiencies and system capacity, operational efficiencies have continued to deteriorate since the last 2020/21 review, and design capacity has remained stagnant. This remains a significant concern for both the Regulator and port users, underscoring the need for reforms and enhanced CAPEX oversight.

Figure 38: NPA CAPEX expenditure, tariff application versus actual (Rm)



Source: NPA

The 2024/25 Capital Works in progress register reflects 439 ongoing projects, the majority of which are being executed at the Port of Durban, followed by the Port of Richards Bay. The numbers indicate that the majority of these projects are aimed at sustaining current port system operations rather than expanding them. The suspension and discontinuation of projects at advanced stages in the project management cycle raises concerns about the

effectiveness of the project management and approval processes and the total deadweight loss to the port system. Ideally projects must derive a benefit to the system through increased capacity, efficiencies, addressing safety and environmental concerns or attract additional vessel traffic. The termination of projects during the construction phase suggests that critical elements may have been overlooked or miscalculated during planning and approval stage or indicate other material circumstances not considered by the port system.

The resilience of the port system is influenced by its inherent capacity and capabilities, which can be categorized into internal and external factors. Internal factors are those within the control of the port system, such as port handling capacity and infrastructure investments. While these factors may challenge the system, the port industry must adapt accordingly.

Port resilience is achieved through effective risk management, focusing on the port's absorptive, restorative, and adaptive capacities:

- Absorptive Capacity: The ability of a port to handle disruptions in cargo volumes without experiencing significant delays or inefficiencies.
- Restorative Capacity: The ability of the port and terminals to return to operational efficiency after disruptions, such as strikes, weather events, or infrastructure failures.
- Adaptive Capacity: The ability of the port to rapidly modify its operations in order to cope with disruptions.[9]

Port capacity is a measure of the maximum traffic a terminal can handle in a given scenario, whereas capacity utilisation is the actual production output as a percentage of the potential production capacity. Berth and terminal area represent, alongside installed cargo handling, operational systems and labour, the static and dynamic capacity in a terminal. While physical berth size is static in the short term, terminal area capacity is dynamic, and is affected by operational and technological changes i.e. terminal operating equipment, technology and systems to allow higher stacking and/or increasing number of containers per unit area of terminal or stockpiling area for dry bulks or storage/parking in the case of RoRos.

It is generally accepted that when berth capacity utilisation exceeds 70% of available capacity congestion effects will arise, making it more costly to conduct and handle additional trade through a port.[10] The World Bank's Container Port Performance Index (CPPI) for 2020 to 2024 highlights the efficiency performance of South African ports. This according to the index indicates underinvestment in infrastructure to improve operational efficiencies

[9] Gu, B., Chen, J., Haralambides, H., & Liu, J. (2025). A novel method of assessing port resilience and its positive ramifications. Maritime Policy and Management, 52(4), 642-665. https://doi.org/10.1080/03088839.2025.2452272

[10] Haralambides, HE, Cariou, P and Benacchio, M. 2002: Costs, benefits and pricing of dedicated container terminals. International Journal of Maritime Economics, 4: 21-34.

and address capacity constraints in the port system. The table below reflects the results of the CPPI in the period under review.

Table 10: South African ports in the World Bank Container Port Performance Index

Port	Position in 2020 CPPI (out of 351 ports)	Position in 2021 CPPI (out of 370 ports)	Position in 2022 CPPI (out of 348 ports)	Position in 2023 CPPI (out of 405 ports)	Position in 2024 CPPI (out of 403 ports)
Cape Town	347	365	344	405	400
Durban	351	364	341	398	403
Ngqura	349	363	338	404	402
Port Elizabeth	348	312	291	391	395

Source: World Bank Container Port Performance Index reports, various

The table overleaf contrasts the installed capacity of the South African port system with 2024/25 actual throughput, to determine what proportion of capacity is currently utilised, per port and cargo type. A number of points can be noted:

- While overall capacity utilisation in containers is below the 70% congestion rule of thumb, capacity utilisation rates in Durban and Port Elizabeth are extremely high, and are consistent with congestion
- In dry bulk, congestion is beginning to manifest in Richards Bay non-coal dry bulk, and seems to clearly be evident in iron ore in Saldanha, and in manganese in Port Elizabeth
- Liquid bulk is approaching congestion in Richards Bay, Durban and East London
- There is no apparent evidence of congestion in automotive or LPG
- Breakbulk is extremely congested in Richards Bay, Saldanha and Ngqura

While it can be difficult to accurately estimate installed capacity, and thus the extent of capacity utilisation, the analysis suggests that in a number of areas in South African ports capacity constraints are likely sufficient to be having an impact on efficiency outcomes. This result supports the urgency of additional investment in ports infrastructure.

Table 11: Capacity utilisation by cargo type and port, 2024/25

		RB	Durban	EL	Ngqura	PE	Cape Town	Saldanha	MB	Total
Containers (TEUs)	Actual volume	78	2 653 757	19 986	672 757	188 396	793 921			**4 328 895**
	Latent capacity	42 748	385 820	140 625	748 548	11 848	721 580			**2 051 169**
	% capacity utilised	*0,2%*	*87,3%*	*12,4%*	*47,3%*	*94,1%*	*52,4%*			***67,9%***
Coal (tons)	Actual volume	48 500 290								**48 500 290**
	Latent capacity	32 482 097								**32 482 097**
	% capacity utilised	*59,9%*								***59,9%***
Dry Bulk (tons)	Actual volume	16 546 852	13 830 135	301 368						**30 678 355**
	Latent capacity	6 041 525	7 437 896	276 657						**13 756 078**
	% capacity utilised	*73,3%*	*65,0%*	*52,1%*						***69,0%***
Break bulk/MPT (tons)	Actual volume	10 475 681	4 673 131	13 875	5 639 254	3 939 097	463 035	8 845 429	10 652	**34 060 154**
	Latent capacity	-570 002	6 077 287	2 775 866	1 489 171	5 353 151	5 330 880	645 173	262 472	**21 363 998**
	% capacity utilised	*105,8%*	*43,5%*	*0,5%*	*79,1%*	*42,4%*	*8,0%*	*93,2%*	*3,9%*	***61,5%***
Liquid bulk (Kilolitres)	Actual volume	2 745 658	22 076 609	1 274 216		1 026 297	3 257 554	5 676 951	677 147	**36 734 432**
	Latent capacity	1 223 361	9 932 633	321 028		1 973 703	5 424 109	13 085 289	1 261 195	**33 221 318**
	% capacity utilised	*69,2%*	*69,0%*	*79,9%*		*34,2%*	*37,5%*	*30,3%*	*34,9%*	***52,5%***
Automotive (units)	Actual volume		550 993	95 679		162 054				**808 726**
	Latent capacity		930 732	506 391		438 788				**1 875 911**
	% capacity utilised		*37,2%*	*15,9%*		*27,0%*				***30,1%***
Iron ore (tons)	Actual volume							50 349 497		**50 349 497**
	Latent capacity							7 870 103		**7 870 103**
	% capacity utilised							*86,5%*		***86,5%***
LPG (tons)	Actual volume							204 723		**204 723**
	Latent capacity							2 517 480		**2 517 480**
	% capacity utilised							*7,5%*		***7,5%***
Manganese (tons)	Actual volume					5 557 260				**5 557 260**
	Latent capacity					595 422				**595 422**
	% capacity utilised					*90,3%*				***90,3%***

Source: NPA, own extrapolation

4.1 Vessel calls

Vessel call volumes are part of the context of port capacity. As shown in the table below, the South African ports system accommodated 8 850 vessels per annum on average over the period 2020/21 to 2024/25, with the majority of ships serviced being cargo moving vessels. While a COVID related decline is evident in 2020/21 and 2021/22, vessel call numbers have otherwise been fairly stable. It is however noticeable that dry bulk vessel calls continued to decrease into 2022/23, reflecting the logistics crisis in dry bulk, which has had a marked impact on export volumes and economic growth.

Table 12: Vessel calls for the period under review

Vessel Type	2020/2021	2021/22	2022/23	2023/24	2024/25
Cargo vessels					
Container Vessels	1 771	1 531	1 506	1 565	1 613
Bunker Vessels	10	12	10	10	13
Liquid Bulk Vessels	1 766	1 692	1 968	1 844	1 679
Break Bulk Vessels	679	619	549	660	792
Dry Bulk Vessels	2 839	2 768	2 599	2 688	2 629
Automotive Vessels	421	519	564	511	544
Total Cargo Vessels	**7 486**	**7 141**	**7 196**	**7 278**	**7 270**
Non-Cargo Vessels	1 086	1 381	1 769	1 706	1 930
Total Vessels	**8 572**	**8 522**	**8 965**	**8 984**	**9 200**

Source: National Ports Authority

The table overleaf splits out ocean-going cargo vessel calls per cargo type and per port, for the calendar year 2025. The ports which receive the largest number of such vessel calls is Durban, followed by Richards Bay and Cape Town. The pattern of calls at each of these ports is quite different however, with Durban's calls split fairly evenly between containers, dry bulk and tankers, Cape Town's largest category being containers by a substantial margin, and Richard's Bay traffic being very largely dry bulk. Mossel Bay received only 45 cargo vessel calls in 2025.

Table 13: Cargo vessel calls and vessel size per port and cargo type, calendar year 2025

	RB	DBN	EL	NGQ	PR	MB	CT	SB	Total
Number of vessels									
General cargo	49	155	2	44	40	-	222	27	539
Dry bulk	1 146	613	18	230	258	-	226	474	2 965
Liquid bulk	43	45	3	5	13	1	20	24	154
Containers	2	786	37	395	155	-	510	1	1 886
Tankers	165	650	93	24	125	16	247	33	1 353
Passenger vessels	21	72	9	-	44	17	78	3	244
Car carriers	-	330	85	1	94	-	1	2	513
Other	1	20	8	5	2	11	14	1	62
Total	**1 427**	**2 671**	**255**	**704**	**731**	**45**	**1 318**	**565**	**7 716**
Average vessel size (GT)									
General cargo	26 200	17 762	14 101	19 503	25 577	-	15 184	31 465	18 862
Dry bulk	46 233	32 203	31 334	34 867	34 284	-	30 881	72 396	44 333
Liquid bulk	37 202	25 446	29 959	31 049	27 222	28 813	33 959	59 301	35 552
Containers	94 008	51 495	11 941	62 025	35 675	-	42 739	74 661	49 314
Tankers	20 443	27 290	26 764	9 874	18 727	33 263	27 686	57 669	26 203
Passenger vessels	40 146	62 957	43 263	-	62 975	42 305	55 836	15 718	55 975
Car carriers	-	58 854	58 183	57 718	58 463	-	47 053	32 789	58 544
Other	32 309	25 029	2 844	30 250	31 387	297	19 062	32 309	17 292
Total	**42 259**	**39 801**	**35 179**	**48 265**	**36 145**	**28 522**	**33 637**	**68 515**	**41 512**

Source: National Ports Authority, own extrapolation

As indicated in the table, average vessel size for the system as a whole is just over 41 000 gross tons. Per cargo type, the largest vessels are car carriers, followed by passenger vessels. The port with the largest average vessel size is Saldanha Bay, which has the largest average dry bulk vessel size and the second largest average container vessel size. Mossel Bay has the smallest average vessel size.

5 Confidentiality

All confidential information of the NPA and of third parties obtained during the course of this project will be sourced and managed in terms of Chapter 4 of the Regulations to the National Ports Act, 12 of 2005. Further, all confidential information of the NPA and of third parties will be managed in terms of Chapter 8 of the Directives to the National Ports Act, 12 of 2005.

Disclaimer:

To the best of our knowledge, the information contained herein is accurate and reliable as of the date of publication. The Regulator welcomes any input to assist in updating or correcting the information contained herein. Any comments and/or suggestions may be forwarded to comments@portsregulator.org