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Weekly Logistics Report 2010 – Week 20

The charts associated with this report can be found on the following link otherwise on the CGA Logistics Website: http://www.cga.co.za/site/files/5438/CGA%20Weekly%20Logistics%20Report%202010%20-%20WEEK%2020.pdf

Statistics are based on data reflected at the end of the previous week

1. Packed and Shipped Volume (Cartons)
   - YTD packed: 24% up from 2009; all commodities are up on 2009 apart from GF which is down by 15%. Refer chart 1.1
   - YTD shipped: 18% down from 2009; all commodities are down on 2009 apart from SC which is up by 16%. Refer chart 1.2
   - YTD commodity co-efficient[1]: down by 18.6% from 2009, all commodities are down from 2009. Particular attention should be made on GF and OR where stock age may be high. Refer chart 1.3
   - YTD commodity shipped by port: all commodities out of CPT (SC up 41%) and PE are up from 2009 and all commodities out of DBN (GF down 47%) and MPT are down from 2009. Refer chart 1.4

Port Export Volume Comparison 2010				
Year	**Cape Town**	**Durban**	**Maputo**	**Port Elizabeth**
2009	61.99% up	-38.64% down	-5.29% down	70.13% up
2008	30.51% up	-34.14% down	-18.50% down	-6.87% down

2. Port Stock Dwell Time, Fruit Age & Port Stock Volume
   - Stock at all 4 export ports is currently higher than past 2 seasons, this obviously related to the Transnet strike and the impact on shipping. Durban port stock particularly high this week compared to both 2008 and 2009 seasons. Vessels have been scheduled to Japan, Russia, Europe and Middle East at DBN / PE and CPT to relieve stock pressure over the next few days. Refer chart 2.5
3. Export Market Volume
   - Higher volume can be seen to Russia. Middle East and Canada on all commodities and in particular SC. Europe market substantially lower than previous seasons mainly on GF. Refer charts 3.1 and 3.2.
4. Port Shipping Mode Gearing
   - Higher amount of container loading evident from CPT and PE ports, both indicating higher amount of containers are loading at inland loading points such as on farm or at inland cold stores. Substantially lower volume out of Durban can be seen on this chart. Refer chart 4.1.
   - YTD containerized export percentage CPT = 78% / DBN = 72% and PE = 84%. Refer chart 4.3.
5. Shipping Mode Volume Trends
   - YTD containerized exports are lower than 2008 and 2009 season, result of Transnet strike. Refer chart 5.4 and 5.5.
6. Regional Shipping Mode Volume:
   - Earlier season volume can be seen from CPT, PE and DBN ports leading to week 18 where volume reduced substantially – more substantially from the Durban port. Refer chart 6.5.
7. Inland Container Loading Volume Trend:
   - Higher volume of inland container loading can be seen from WC and EC regions, seen to Europe and Middle East. Refer chart 7.1 and 7.2
8. Citrus Rail Volume Statistics:
   - Rail volume from Letsitele and Hoedspruit was due to commence last week but due to the strike rail loading has seized until Transnet services have stabilized post the strike.
9. RSA Port Total Container Volume Statistics:
   - Durban port container volumes have increased to normal levels compared to the 2009 recession period. Will this mean the Durban Container Terminal will congest once again as seen during the 2007 and 2008 seasons? Refer chart 9.1
10. Resource Trends:
    - RTM – SIN Bunker price average is double that of 2009 season – not a good indication on BAF levels.
    - Basic Diesel price has increased by 22% from March 2009 – May 2010.

Notes: The 2010 FIFA World Cup™ - Impact on Citrus Exports document is now available at the following link or on the CGA Logistics website: http://www.cga.co.za/site/files/5438/FIFA%20World%20Cup%20-%20Citrus%20Logistics%20Impact.pdf

[1] Commodity Co-efficient is the difference between Packed and Shipped volume, this percentage indicates the efficiency of stock movement out the country and will also relate to stock age and storage costs.