

Weekly Logistics Report 2010 – Week 21

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/awdep.asp?dealer=5438&depnum=30494>

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

1. Packed and Shipped Volume:

- 1.1. The Transnet strike has had a significant impact on the flow of citrus out the ports and this can be seen on the charts where citrus packing is higher than the 2009 volume with far lower shipped volume. Refer charts 1.1 and 1.2
- 1.2. The coefficient chart has been amended to reflect the percentage of Shipped vs. Packed, this gives a better view of the difference between the two volumes. The 2010 coefficient percentage is way lower than 2009 which indicates that fruit is tied up in storage. In 2009 the YTD coefficient was 51.83% of citrus being shipped compared to 32.31% in 2010, the lowest being Oranges (Navels) at 13.39% and Grapefruit at 26.24%. Refer chart 1.3
- 1.3. The port shipped volume indicates that Cape Town, Port Elizabeth and Maputo ports are stable while all commodities out of Durban are substantially lower than 2009 volume. When one considers the strike impact and the current Durban port stock levels, it would appear this is where some attention is required to move stock through the system. Refer chart 1.4

Port Export Volume Comparison 2010 vs. Previous Seasons YTD				
Year	Cape Town	Durban	Maputo	Port Elizabeth
2009	48.96% up	-28.82% down	84.02% up	59.64% up
2008	15.68% up	-17.76% down	11.88% up	-0.89% down

2. Port Stock Dwell Time, Fruit Age and Port Total Stock Volume:

- 2.1. We can see here that stock levels have decreased in Cape Town and Port Elizabeth while stock levels in Durban remain on par with the previous week and are still rather high. The shipping schedule out of Durban indicates that stock levels should decrease by next week and fall in line with 2008 and 2009 levels. Refer charts 2.3 – 2.10.

Note: a world cup road closure trial run was conducted in Durban today, this commenced from midnight last night and was concluded at 21h00 this evening. Well suffice it to say that Durban came to a complete standstill around the stadium precinct and the N2 northbound and southbound was closed due to one accident near King Shaka airport earlier today. The N2 was completely closed off and traffic was diverted to alternate routes while the backlog was being cleared. Let's keep our fingers crossed that during the world cup measures would have been implemented to prevent this.