

Weekly Logistics Report 2010 – Week 26

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&depnun=30494>

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

1. Packed and Shipped Volume (15kg Eq cartons):

- 1.1. The total volume of citrus Packed is currently 36m in 2010 compared with 34m in 2009 YTD. LE, OR and SC types are reflecting an increase while GF still falls short. The total Shipped volume during 2010 is almost on par with 2009, GF types are still lagging other commodities. Refer charts 1.1 and 1.2
- 1.2. The Commodity Percentage Shipped vs. Packed has fallen slightly short of the 2009 value at 76% compared to 80%. GF and OR varieties seem to be the slower moving varieties. Refer chart 1.3
- 1.3. The port shipped volume is showing a similar result although there has been a considerable surge in citrus exported from the CPT port in the last 3 weeks. The volume of citrus currently exported from the CPT port is higher than the last 3 years; according to the data. Refer chart 1.4

YTD Port Export Volume Comparison 2010 vs. Previous Seasons				
Year	Cape Town	Durban	Maputo	Port Elizabeth
2009	33% up	-13% down	1% up	6% up
2008	14% up	-9% down	43% up	-2% down

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

- 2.1. The packing data has reflected a higher amount of Valencia's have been packed during week 25 than that of the 2009 season. This can be seen in the stock data where all 4 ports are showing an increase in stock holding. The stock position of the Durban port has been consumed within a single week where the stock holding is slightly short of the capacity threshold. Refer charts 2.3 – 2.10.

Notes:

1. The shipping data is showing that there has been a considerable amount of citrus exported in containers through the CPT port over the last 3 weeks, **300 extra containers have been loaded in the last 3 weeks** compared to 2009. The data suggests that the extra 300 containers have been loaded to the Middle East out of CPT. There have also been additional containers loaded to Russia and Mediterranean. Shipping lines should ensure that there are additional placements of empty containers to CPT where indications from shippers suggest so. The WC and EC regions have prioritized the loading of containers over Reefer ships, this is considered risky and ought to be reconsidered.
2. Some shippers have indicated that there is a shortage of empty containers available in RSA due to the limited number of containers placed during and post the strike period. This may be an unfortunate circumstance as the Valencia run begins to peak over the next 14 weeks requiring additional capacity. A suggestion would be for shippers to ascertain the ability of container lines to meet the weekly allocations over the next few weeks. **Where a shortage can be identified perhaps prioritization on available containers should be given to the Middle East route** and consider moving more citrus to Europe and Mediterranean on Reefer ships and increase the terminal to terminal volume.