By: ML Brooke

3rd September 2010

Logistics Report 2010 – Week 35

The charts associated with this report can be found on the following link otherwise on the CGA Logistics Website: http://www.cga.co.za/pages/30494

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

1. Packed and Shipped Volume (Pallets):
   - YTD packed: 13% up from 2009. LE, OR and SC types are up on 2009, GF is 10% down. Refer chart 1.1
   - YTD shipped: 9% up from 2009, again LE (11%), OR (16%) and SC (14%) types. Refer chart 1.2
   - YTD Shipped vs. Packed %: at this point in time 3.4% down from 2009 – no major issues present. Refer chart 1.3
   - YTD commodity shipped by port: CPT port has shown consistent growth this year which is up on 2008 and 2009 seasons – seen on OR and SC types. There is a possibility that fruit was diverted from the north through the CPT port to avoid stock issues. All the main ports have shown growth this season with the Durban port only showing a marginal increase – down on GF types with a higher volume of Vals seen. Refer chart 1.4

Port Export Volume Comparison 2010 vs Previous two Seasons				
Year	**Cape Town**	**Durban**	**Maputo**	**Port Elizabeth**
2009	26.01% up	4.03% up	8.78% up	9.62% up
2008	-6.11% down	-1.19% down	18.10% down	8.70% up

2. Port Stock Dwell Time, Fruit Age & Port Stock Volume:
   - Stock in CPT / PE and DBN is stable while MPT shows stock levels have been high over the past 3 weeks. Stock levels in the PE port has been high over the last 3 weeks but has stabilized this week. Refer charts 2.1 – 2.7
3. Export Market Volume:
   - Volume of citrus exports to most markets are on par with previous years although growth can be seen to Russia. The European markets have regained slightly from the 2009 seasons reduction. Refer charts 3.1 and 3.2.
4. Port Shipping Mode Gearing:
   - The ratio of export volume through the ports has adjusted this year CPT = 19% / PE = 21% / DBN = 55% / MPT = 5%. Higher volume of container loading evident through the DBN and PE ports.. Refer chart 4.1.
   - YTD containerized export percentage CPT = 73% / DBN = 64% and PE = 87%. The ratio of total Container vs. Conventional loading has increased to 70/30 YTD. Refer chart 4.3.
5. Shipping Mode Volume Trends:
   - A peak in container loading can be seen from week 27 – 31 with the highest volume of citrus containers shipped from RSA during week 31 this year. Refer chart 5.1.
   - The 2010 accumulative container volume has continued to exceed the 2008 and 2009 volume YTD. Refer chart 5.2
   - Growth in containerization evident to Europe, Middle East and MED markets, the latter showing significant shift to containers. Refer charts 5.5 and 5.6
6. Regional Shipping Mode Volume:
   - The peak in container loading very evident through the Durban and Port Elizabeth ports. Both ports have shown strong growth to containerization with volume of container loading well above previous years . The Durban port has shipped 12,000 containers in the last few weeks, this is about 2,000 more containers than in 2008 and 2009 during the same period. Refer chart 6.1 – 6.12.
7. Inland Container Loading Volume Trend:
   - Consistent volume of inland container loading can be seen from WC and EC regions, seen to Middle East, Europe and MED markets. Refer chart 7.1 - 7.3.
8. Citrus Rail Volume Statistics:
   - Rail operations have been problematic this year, both on the Reefer and Break-bulk operations. It is estimated that the same volume of citrus will be transported as the 2009 year – somewhere around 40,000 pallets. Estimated at 3% of the total citrus crop. Refer chart 8.1
9. RSA Port Total Container Volume Statistics:
   - Volume of containers through the Durban port has grown consistently this year, there are frequent reports that delays at DCT are common these days as well as a shortage of Reefer plug-in points. Refer chart 9

Notes:

1. Operations at the MPT terminal in Maputo have returned to normal as the riots have subsided. Deliveries of citrus to Maputo should be able to continue this week but should be confirmed with Exporters and Agents.