

CUF & Disruptive Events Mitigation

A collaborative framework for resilient container logistics

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CUF Value Proposition

Industry-led transformation through unified stakeholder action

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Wind Disruption & Challenges

Operational impacts and systemic vulnerabilities

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Collaboration Case Studies

Proven results from 2024/25 and 2025/26 fruit seasons

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Proposed Mitigation Initiatives

Strategic solutions for sustainable export operations

The Container User Forum: A New Paradigm

The Container User Forum (CUF) represents a groundbreaking industry-led initiative designed to **transform container logistics through collaborative action**. Unlike traditional sectoral bodies that advocate for individual interests, the **CUF operates as a unifying platform** where shipping lines, terminal operators, cargo owners, technology providers, and regulatory authorities work together to solve systemic challenges.

The CUF unites the full spectrum of stakeholders under one unified platform; a neutral space for any participant in the container sector to engage on issues that transcend individual commercial interests. By pooling resources, sharing data to global standards, and aligning on measurable KPIs, the CUF enables cross-chain solutions that no single entity could achieve alone.

This collaborative model breaks down silos, accelerates innovation, and ensures that South Africa's container logistics infrastructure remains competitive, resilient, and responsive to global trade demands.



Where CUF Connects the Dots Across the Chain



**ORIGIN:
FARM / FACTORY**

Stuffing, weighing,
quality checks



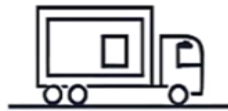
**LOCAL DEPOT /
PACKHOUSE**

Consolidation,
container stuffing,
VGM, documentation



**INLAND
TERMINAL/ICD**

Stack, customs,
staging for corridor



**CORRIDOR
ROAD / RAIL**

Long-haul to port-A
Eastern./ Central/
Western Corridors



**TERMINAL
YARD**

Stacking, shuffiing,
reefer plugs; staging
to quay



**QUAY &
VESSEL**

Berth planning,
crane productivity
window adherence

Import & Export

- Inland collaboration and operational efficiencies
- Landside flow optimisation for truck and rail productivity
- Landside-waterside interface improvements

End-to-End Visibility

Real-time insights across the entire supply chain

Co-ordinated Solutions

Aligned actions from all stakeholders for systemic improvements

Independent Advocacy

Data-driven engagement with government and regulators



LEADING DIALOGUE
ENABLING SOLUTIONS

CUF Complements Existing Bodies

Existing associations serve as sectional voices for forwarders, shipping agents, truckers, and inland ports, providing essential representation, member services, and domain-specific standards. These remain vital to the industry, and the CUF reinforces rather than replaces them.

The CUF operates as the **cross-industry execution engine** that convenes all interests for system-wide solutions.

What Existing Platforms Do Well

- Represent sectional interests to government and regulators
- Provide member services: guidance, training, information updates
- Advance standards within their specific domains

CUF's Unique Opportunity

- Cross-industry initiatives with owners, budgets, and KPIs
- Ring-fenced common fund for execution
- "One-truth" data aligned to global standards
- Neutral convening power for trade-off decisions
- Competition-law guardrails with formal protocols

Associations must continue to advocate. CUF will complement with implementation, ensuring that collaborative projects deliver tangible, measurable outcomes across the entire logistics ecosystem.

CUF Collaborative Projects

The CUF intends to combine resources from members and stakeholders to fund container sector priority projects and mega-projects that address both immediate operational needs and long-term strategic imperatives.

Priority & Sustainability Projects

Corridor Strategy for Deciduous Fruit Season
Advanced planning and risk mitigation

Security on Container Rail Corridors
Enhanced protection of high-value cargo

Strengthening Back-of-Port Connectivity
Improved landside infrastructure and flow

Global Standards Skilling & Upskilling
Workforce development for modern logistics

Mega Projects

Regional Hub & Integration
Positioning South Africa as the African logistics gateway

Research Unit & Policy Reform
Data-driven advocacy for regulatory improvements

Transshipment Hub & Spoke with Benchmarked Rail Pricing
Competitive, transparent pricing models

Capacity Creation: Digitalisation & Innovation
Technology-led productivity gains

Industry Workshops: A platform to engage on enhancing the Container Logistics Supply Chain through structured dialogue and shared learning.

Fruit Seasons Review: Collaboration Delivers Results

The 2024/25 and 2025/26 fruit seasons were successful, with excellent planning and capacity coordination yielding strong results. **Close collaboration between cargo owners, shipping lines, transport providers, and Transnet Port Terminals (TPT) ensured that peak volumes were managed efficiently across multiple terminals.**

Statistics show that deciduous fruit exports were distributed strategically: a significant portion was handled at Cape Town terminals, with additional volumes processed through Durban and Port Elizabeth terminals to balance capacity and reduce congestion risks.

4526

Containers Diverted

To Port Elizabeth terminals, up from 665 the previous season

1089

Peak Week Volume

Table grapes in week 3

Deciduous Planned vs. Executed Export Numbers

A total of 4,526 containers were diverted to Port Elizabeth terminals; a substantial increase from just 665 containers in the previous season (2024/25). This diversion strategy proved critical during peak periods, with table grapes alone moving 1,089 containers in a single week (week 3).

The proactive corridor approach minimised delays, maintained cold-chain integrity, and preserved product quality, demonstrating the tangible benefits of industry-wide coordination and advanced scenario planning.

Citrus Season Review: Growth Through Synergy



Season Growth Achievement

The citrus season saw a 19% year-on-year volume growth, driven by successful operational execution and collaborative efforts across the supply chain. This growth was achieved despite challenging weather conditions and global shipping disruptions, demonstrating the resilience of coordinated logistics planning.



Collaborative Efforts

Success was driven by synergy between operational teams, growers, and logistics partners who worked together to overcome challenges. Regular stakeholder meetings, shared data visibility, and proactive contingency planning ensured that issues were identified and resolved before they could impact export schedules.



Adaptive Logistics

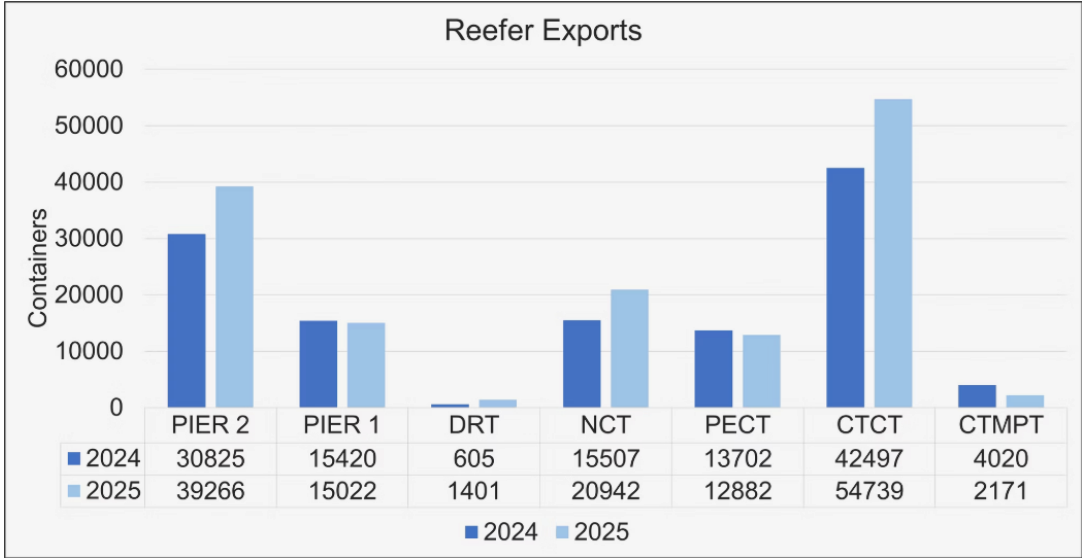
Implementing adaptive logistics ensured efficiency and reliability throughout the citrus season. Dynamic route planning, flexible vessel scheduling, and real-time capacity adjustments allowed the industry to respond quickly to changing conditions, maintaining service levels and protecting product quality from farm to destination market.



Reefer Exports 2025: Terminal Volumes Year-on-Year Comparison

The 2025 reefer export season delivered strong performance across all terminal facilities, with substantial year-on-year growth reflecting improved operational capacity, enhanced collaboration, and strategic corridor planning.

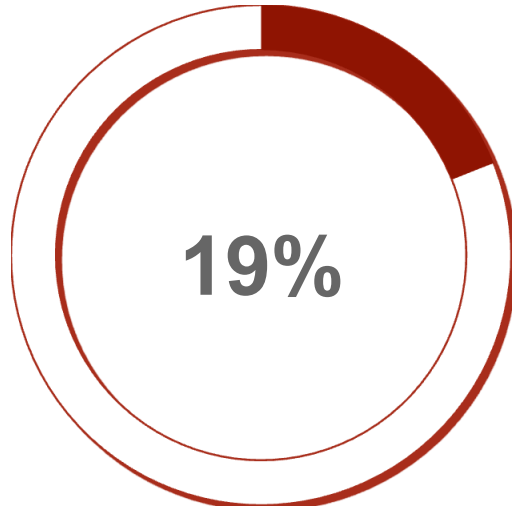
The data demonstrates the effectiveness of planning, coordinating resources and optimising throughput during critical export periods.



Terminal Performance Highlights

Cape Town, Durban, and Port Elizabeth terminals collectively processed record volumes of refrigerated containers, with Cape Town maintaining its position as the primary export gateway for perishable products.

Port infrastructure investments, improved crane availability, and enhanced reefer plug capacity all contributed to the sector's ability to handle increased volumes without compromising cold-chain integrity or vessel turnaround times.



Volume Growth

Year-on-year increase in reefer exports



Impact of Inclement Weather on Port Operations



Meteorological Impact on Port Operations

Strong south-easterly winds cause unsafe crane operations, leading to berth shutdowns and operational delays. When wind speeds exceed safe operating thresholds, terminal operators must suspend container handling to protect equipment and personnel, resulting in vessel waiting times and schedule disruptions that cascade throughout the supply chain.



Disruption Effects on Supply Chain

Operational disruptions cause congestion, reduced vessel productivity, and reefer plug shortages, impacting cold-chain integrity and fruit quality. Delayed vessels compete for limited berthing windows, creating backlogs that affect subsequent sailings. Reefer containers require continuous power, and plug shortages during congestion periods can compromise perishable cargo worth millions of pounds.



Systemic Risk and Export Vulnerability

Over-reliance on a single export corridor creates systemic risk, threatening loss of market access and export competitiveness. When weather events disrupt the primary terminal, the entire export programme faces potential collapse without viable alternative routes. This concentration risk undermines South Africa's reputation as a reliable supplier and jeopardises long-term trade relationships with key markets.

Statistics of Wind Impact on Terminal Operations

Wind Impact: Capacity Lost to Externalities

Installed capacity was significantly reduced by externalities such as inclement weather. The 2025/26 season experienced over 40 days lost to wind disruptions; a substantial increase compared to the 2024/25 season. This represents a meaningful erosion of theoretical terminal capacity and directly impacts export volumes, vessel scheduling, and supply chain reliability.

The cumulative effect of these lost operating days translates to thousands of containers that could not be processed during optimal export windows, forcing growers and exporters to either delay shipments (risking product quality) or divert volumes to alternative terminals at higher logistical cost.

40+

Days Lost to Wind

In the 2025/26 season

25%

Increase vs. Prior Year

Compared to 2024/25

Volume Impact and Diversion Requirements

Planned volumes exceeded processed volumes due to wind-related disruptions, requiring significant container diversions to TPT terminals in Durban and Port Elizabeth. The shortfall between planned and executed volumes highlights the urgent need for corridor strategies and alternative export routes.

Installed Capacity: Rail, Landside, and Port Capability

While theoretical installed capacity exists across rail networks, landside infrastructure, and port facilities, effective capacity is constrained by weather vulnerabilities and infrastructure bottlenecks. Addressing these constraints requires both short-term operational adaptations and long-term capital investment in resilient infrastructure.

Proposed Solutions for Sustainable Fruit Export Seasons

Short to Medium Term Initiatives



Corridor / Diversion Strategy

Port operations across multiple terminals



Private Sector Partnering

Collaborative capacity development

Long Term Initiatives



Wind Barrier Technology

Engineering solutions for weather resilience



Terminal Relocation

Strategic repositioning for operational continuity

The corridor strategy involves advanced planning and coordination to distribute export volumes across Cape Town, Durban, and Port Elizabeth terminals based on real-time weather forecasts, vessel schedules, and available capacity.

Private sector partnerships will unlock additional resources for infrastructure improvements and operational innovation.

Port Tampa in 2023 unveiled a 3,700-square-metre building designed to withstand high-level storms, including wind loads up to 305 kilometres per hour, to secure essential assets and equipment against inclement weather.

Similar engineering solutions could be adapted for South African conditions to protect critical infrastructure and maintain operational continuity during severe weather events.

Advantages of the Corridor Diversion Strategy



Risk Mitigation Through Advanced Planning

The corridor strategy requires advanced planning by all parties, leading to reduced supply chain risks.

By identifying alternative routing options before disruptions occur, exporters can respond quickly to changing conditions without compromising delivery commitments or product quality.

Cost to Serve Advantages

Operational costs and commercial costs vary between Cape Town and other terminals. A comprehensive corridor strategy evaluates the total cost of delays, cold-chain risks, and alternative routing to identify the most economical approach for different cargo types and market destinations, ensuring that exporters make informed decisions based on total landed cost rather than port tariffs alone.



Modal Shift and Cost Efficiency

The strategy supports modal shift to rail where appropriate, drives cost efficiency through competitive routing options, and addresses price inefficiencies by creating transparent benchmarks across terminals and transport modes.



System Redundancy and Port Coopetition

Enhances the complementary port system, improves system redundancies, and encourages healthy port cooperation.

When terminals collaborate rather than compete in isolation, the entire logistics ecosystem becomes more resilient and responsive to market demands.

Maintaining the Momentum: A Critical Window to Pivot

The CUF Vision: Regional Hub

The container logistics industry stands at a critical inflection point.

Recent global disruptions and wind challenges exposed system weaknesses, yet the 2024/25 collaboration and the Table Grape diversion case study demonstrated what's possible through structured collaboration and chasing common goals.

"Without institutionalising this model, today's gains may prove short-lived. The CUF provides the structure to capture momentum and prevent reversion to fragmented approaches."

Unified Voice

Coordinate and align stakeholders for collective advocacy, ensuring the industry speaks with one powerful voice to government, regulators, and international partners.

Operational Excellence

Adopt and implement people, process, and technology solutions that drive measurable improvements across the container networks.

Policy Influence

Inform reforms for transport and logistics, shaping regulatory frameworks that support efficient operations in the container networks.

Regional Integration

Position South Africa as the definitive regional logistics hub, attracting investment and trade flows throughout the African continent.

Collaboration Achievements

In 2025 Transnet Port Terminals reported vastly improved results, consistently averaging over 90,000 TEUs per week, compared with 65,000 a year earlier; a remarkable 7.2% year-on-year increase. In September 2025, terminals handled over 103,000 TEUs in a single week, approaching historic highs.

❏ "According to TPT's Chief Executive, this milestone is a direct result of unprecedented collaboration between TPT, labour partners, shipping lines, cargo owners, and logistics stakeholders." — Statement issued by the National Department of Transport, 7 September 2025



Thank You for Your Attention

The Container User Forum represents **a transformative opportunity to institutionalise the collaborative successes of recent seasons and build a resilient, competitive container logistics ecosystem for South Africa.** By combining resources, sharing data, and aligning on common goals, we can overcome systemic challenges and position our nation as the **premier regional hub for African trade.**

Your participation, insights, and commitment are essential to realising this vision. Together, we can turn today's momentum into sustained operational excellence and long-term strategic advantage.

Questions & Answers

We welcome your questions, feedback, and ideas for strengthening our collaborative approach to container logistics challenges.

