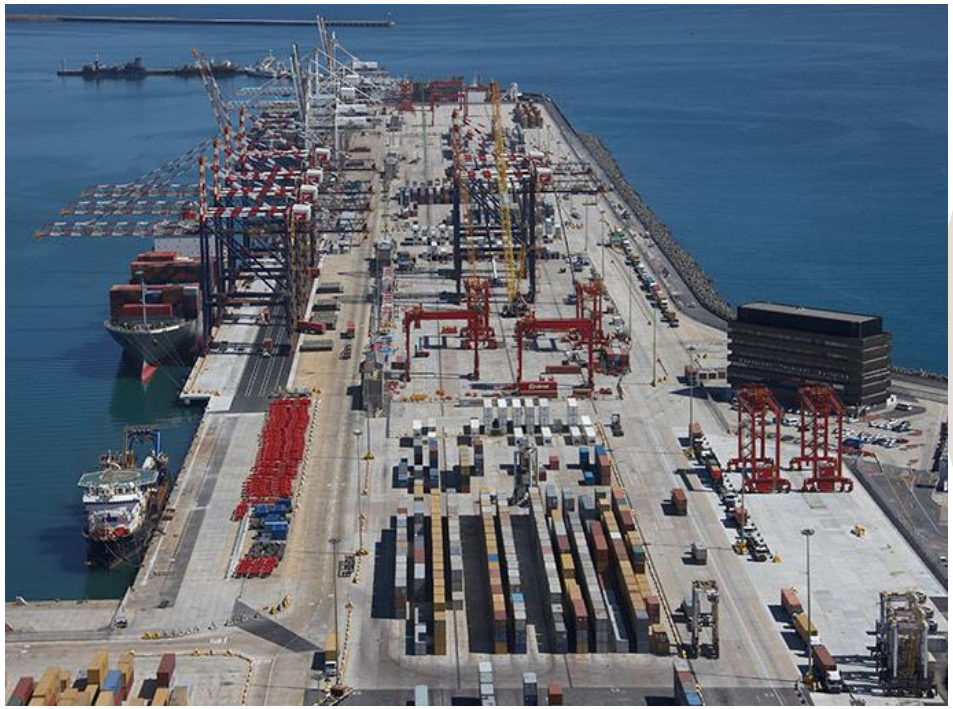
TRANSNET PRESENTATION

PORT OF CAPE TOWN & TRIM UPDATE

Port of Cape Town Stakeholder Dialogue

12 FEBRUARY 2026

AGENDA

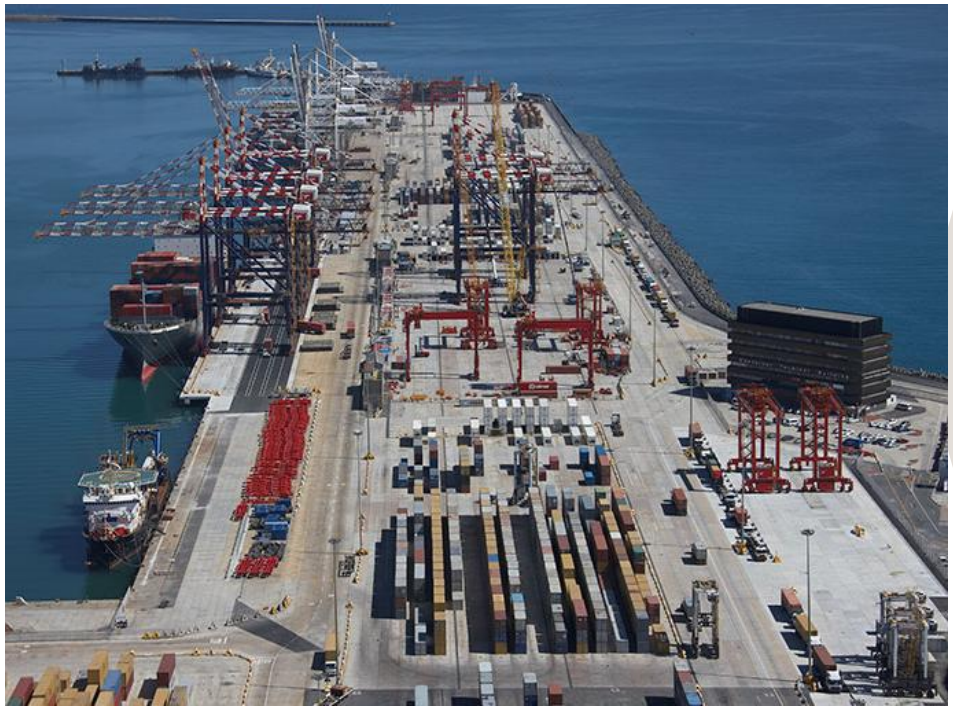


01 TNPA Performance Review and Updates

02 TPT Performance Review and Updates

03 TRIM Update

AGENDA ITEM



01 TNPA Performance Review and Updates

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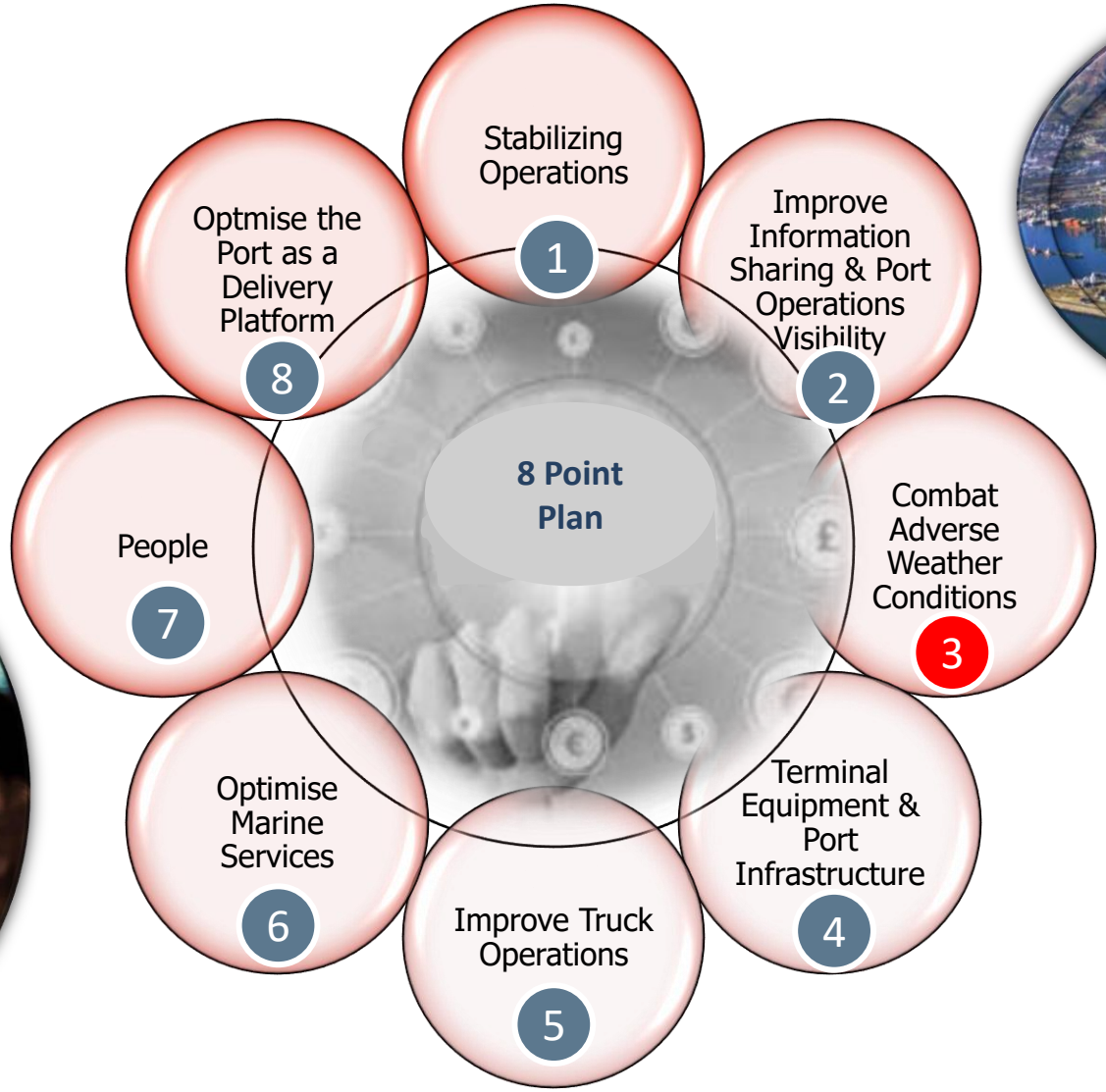
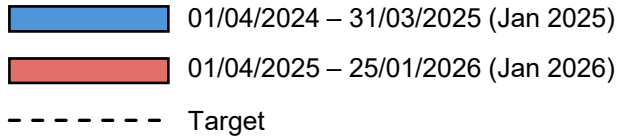
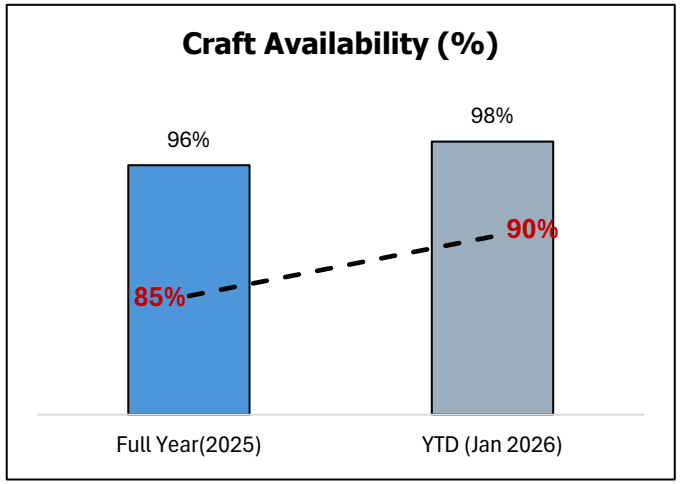
8-POINT PLAN

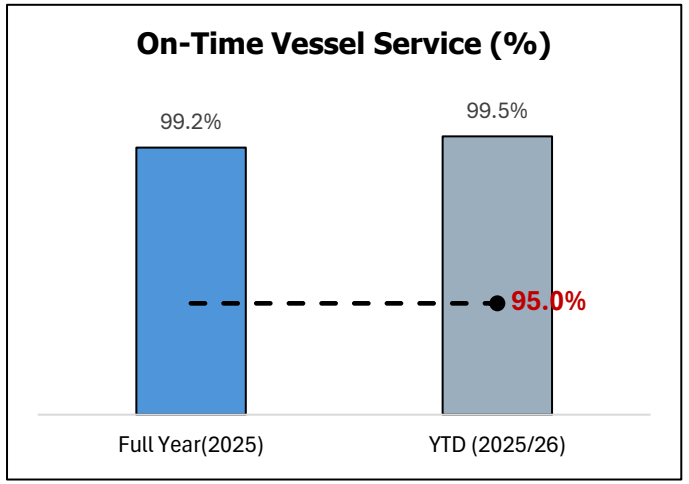
PORT EFFICIENCY IMPROVEMENT PLAN

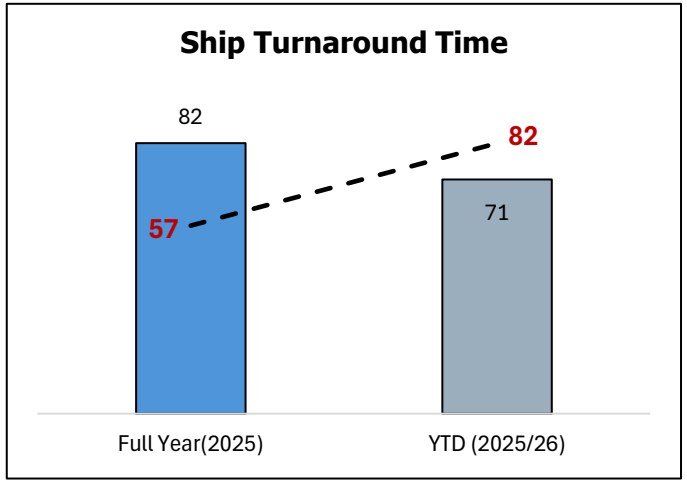


KEY PERFORMANCE INDICATORS (YTD)









COMBATING ADVERSE WEATHER CONDITION

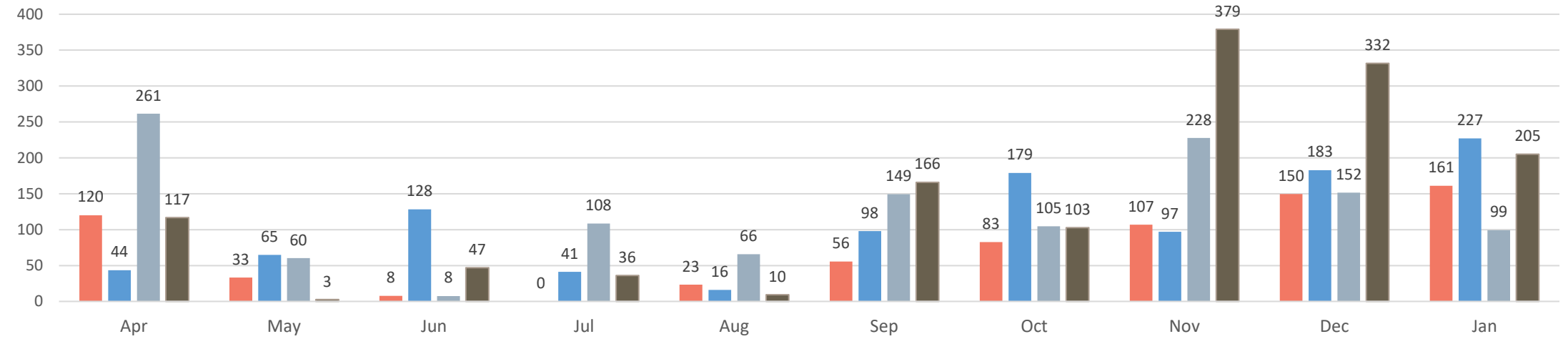
Weather Condition	Initiatives / Strategic Projects	Status
Long Wave	1. Long Wave – Shore Tension (18 x set active at CTCT). Secured 2 additional units for the port. 2. Implementing new Operational Model	Complete In-progress
High Swell	1. Helicopter Services for Pilot Deployment. Shipping lines have bene granted allowance to contract with a private helicopter operator that is approved by TNPA. 2. TNPA is considering a concession for helicopter services	Complete In-progress
Wind	1. CSIR Wind Study to investigate predictive model, potential infrastructure engineering solution/s, equipment which are more resilient to wind, and optimal recovery plan. 2. Unlock areas (terminal) less prone to wind: CT MPT and FPT	Well advanced Complete
Fog	1. Fog – Investigate impact on Marine & Cargo Operations and explore possible mitigation.	In-progress
General	1. Maximise operational uptime: truck "night" and "weekend" runs 2. Improve Information Sharing, Planning & Port Operations Visibility 3. Optimize Marine Fleet (acquire additional tug and MPV and replace workboats and launches)	Well advanced Well advanced Well advanced

ADVERSE WEATHER DELAYS ANALYSIS | WIND

Period: (01 April – 25 Jan) 2022/23 – (01 April – 25 Jan) 2025/26

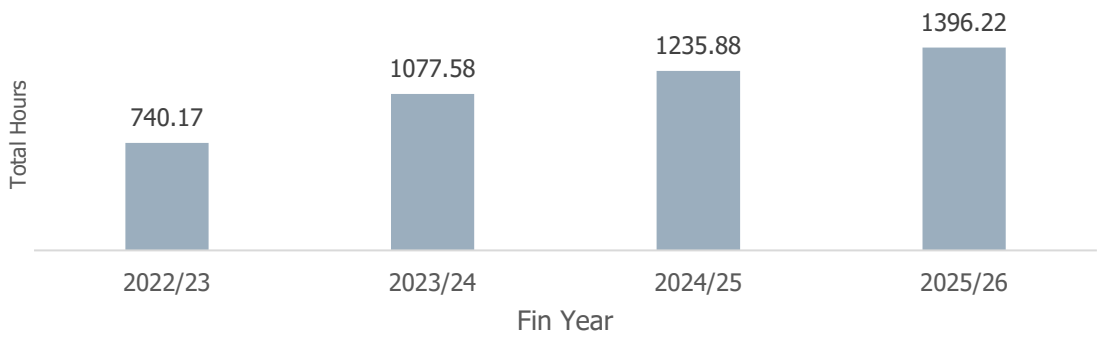
WEATHER DELAYS TREND ANALYSIS | WIND

Period: 2022/23 - 2025/26



YEAR-ON-YEAR WEATHER ANALYSIS | WIND

Period: 2022/23 - 2025/26



When analyzing the wind chart, we observed that wind speeds are generally lower during the winter

This pattern has been consistent over the years, with the 2022-2023 season showing a trend similar to the current year, 2025-2026. A noticeable change occurs in August, which reflects trends from previous years.

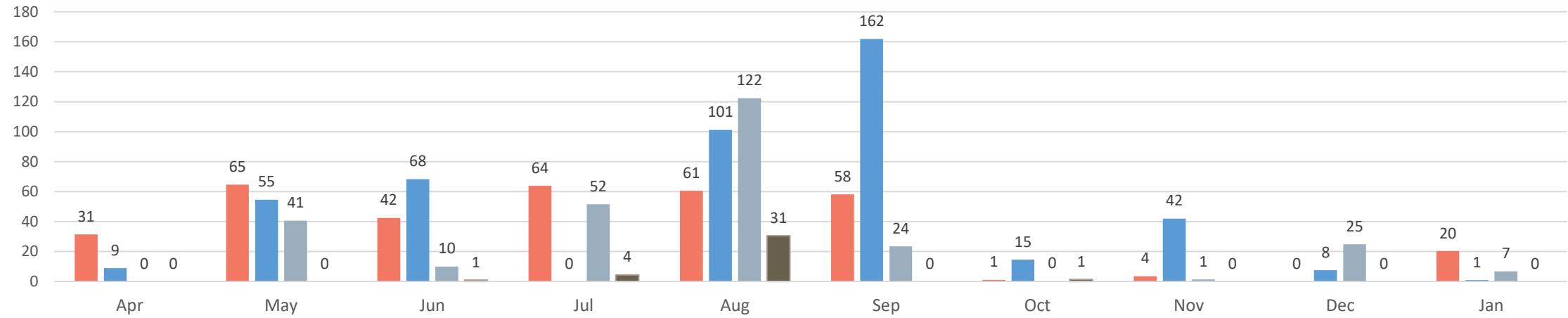
However, a significant shift in weather patterns was recorded in November 2025, indicating delays totalling 379 hours, followed by December 2025, which experienced a total of 332 hours.

ADVERSE WEATHER DELAYS ANALYSIS |LONG WAVE (RANGING)

Period: (01 April – 25 Jan) 2022/23 – (01 April – 25 Jan) 2025/26

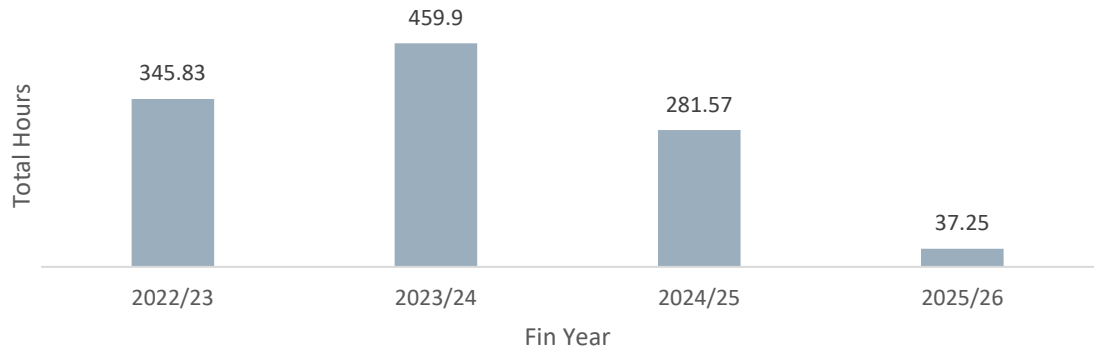
WEATHER DELAYS TREND ANALYSIS | RANGING

Period: 2022/23 - 2025/26



YEAR-ON-YEAR WEATHER ANALYSIS | RANGING

Period: 2022/23 - 2025/26

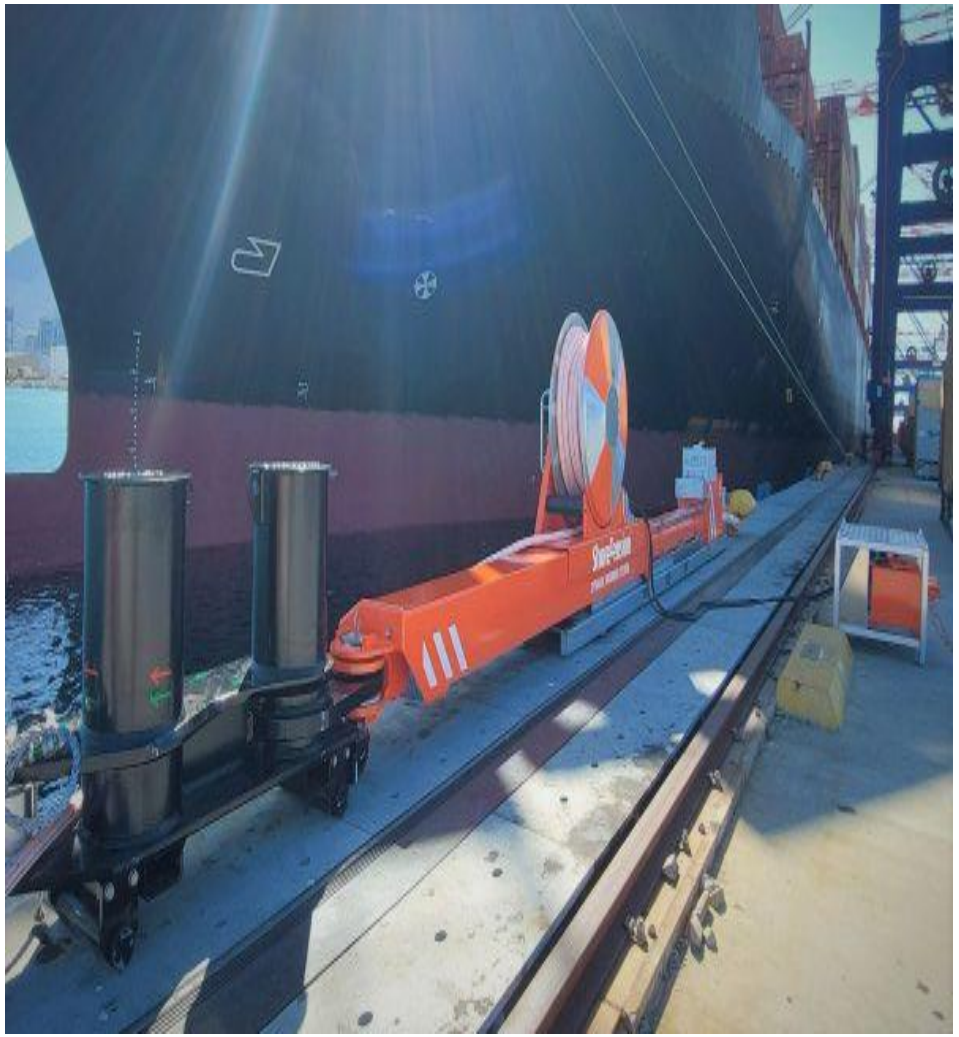


Ranging has significantly decreased over the years, as indicated in the trend analysis above. The delays were recorded at 460 hours for the 2022/23 period and 37 hours for the 2025/26 period, a significant **92% improvement over the two periods.**

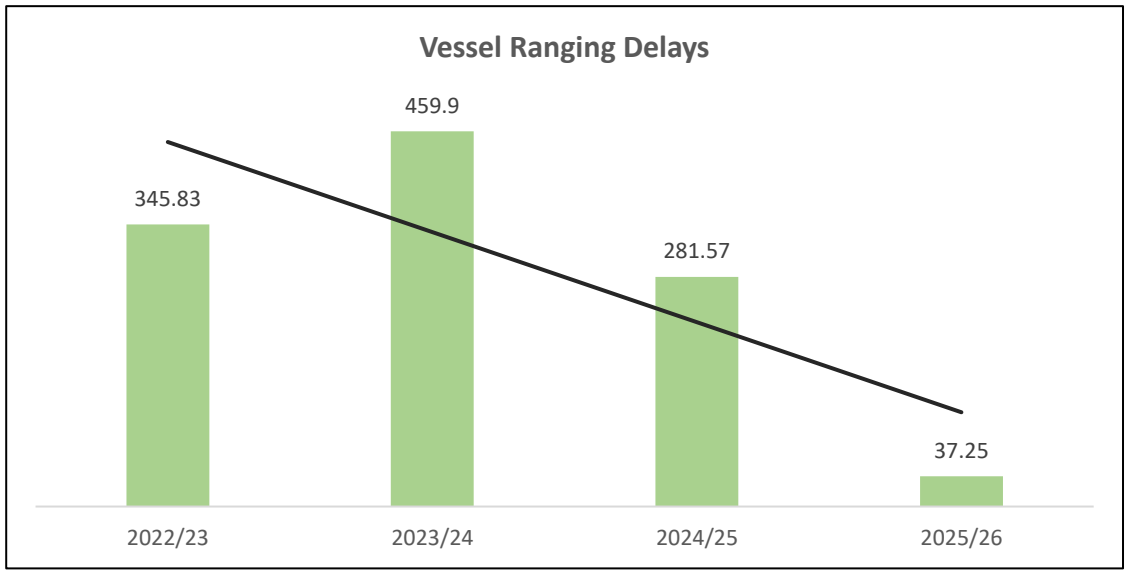
The decline began in 2022, the year the four Shore Tension units were commissioned. In 2024/25, a further decline was noted due to the acquisition of two additional units.

This led to a significant drop in ranging delays from 460 hours in 2023/24 to 37 hours in 2025/26.

LONG WAVE PHENOMENAL – SHORE TENSION (UPDATE)



- ✓ TNPA has invested in Shore Tension units since 2022 to combat the impact of the Long Wave Phenomenal on Port Operations
- ✓ To date TNPA has procured **18 Shore Tension Units** for the Port of Cape Town.
- ✓ All the CTCT berths are now **fitted with Shore tension Units**
- ✓ Delays as a result of vessels ranging has been reduced by **98%** from 23/24 FY to 25/26 FY

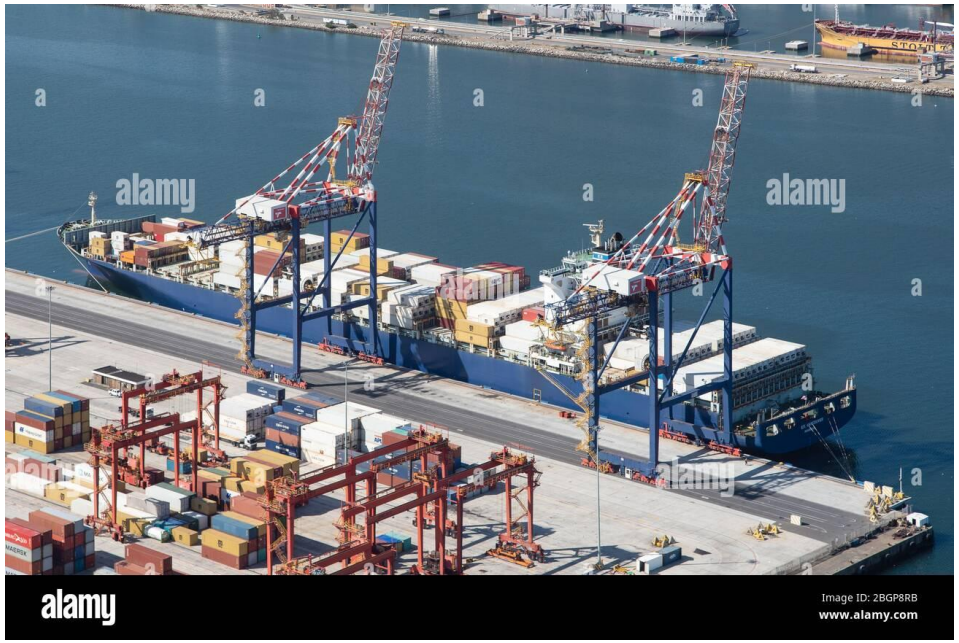


WIND STUDY (UPDATE)

Study Objectives:

- ✓ Understand the effects of wind on the container sector focusing on operational efficiency and the **economic impact** on the region
- ✓ Apply climate change scientific principles to appreciate and quantify **wind trends / short term wind forecasting model**
- ✓ Develop innovative **technical solutions** to overcome the negative effects anticipated

The economic study defines the economic impact of wind disruptions on the WC economy. This study is well advanced and will be completed by end **March 2026,** whereafter which stakeholder engagements will take.

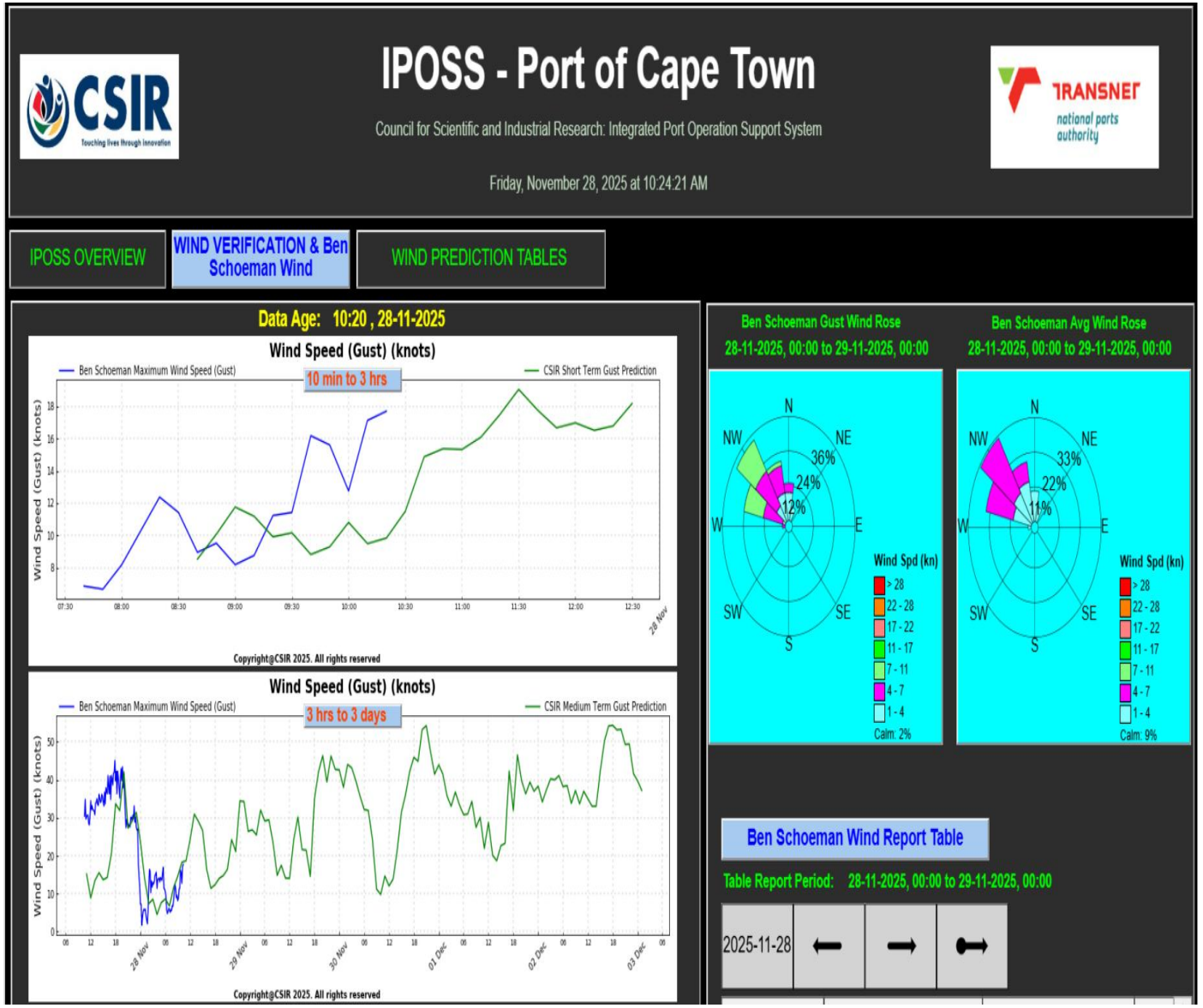


WIND STUDY – SHORT TERM WIND FORECASTING AND MEDIUM TERM MITIGATION STRATEGIES (UPDATE)

The **short-term wind forecasting model** has **been successfully tested** and integrated into the Integrated Port Operations Support System (IPOSS) within TNPA Port Control. IPOSS now provides:

- ✓ **Localized Forecasting**: Predictions based on real-time port-specific conditions and measurements.
- ✓ **Operational Accuracy:** Improved short-term wind forecasts that enable more informed decision-making for shipping movements and port operations.

The **medium-term work stream**, which focuses on wind pattern analysis, trend evaluation, and **mitigation strategies** — including equipment resilience specifications and future port layout considerations — **remains ongoing**.

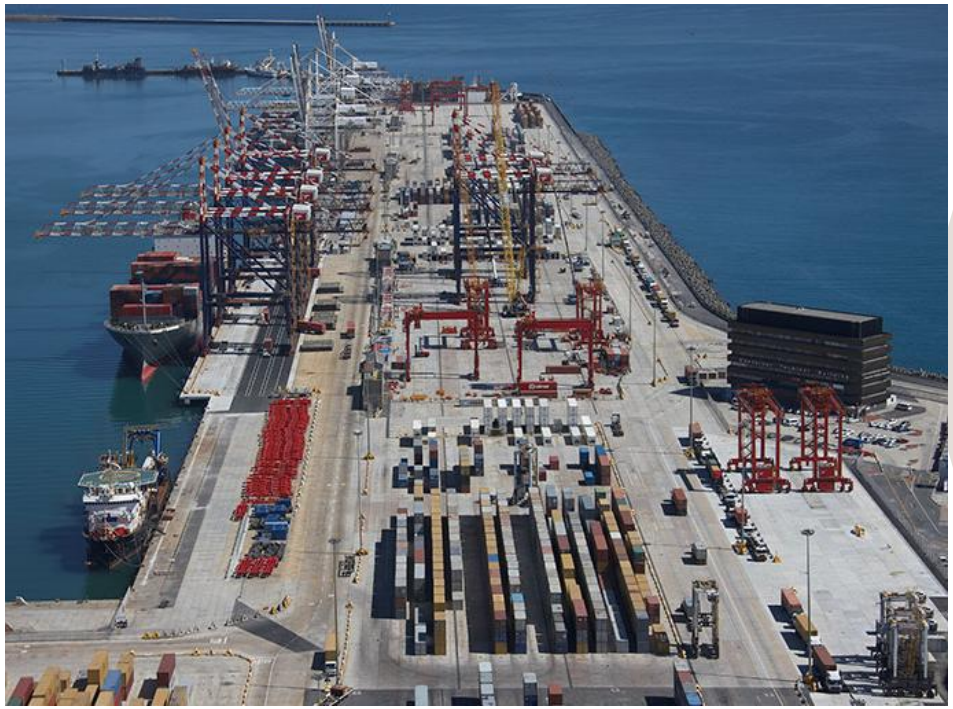


WIND MITIGATION – CREATING ADDITIONAL CAPACITY (UPDATE)

UNLOCKING A BERTH FOR CARGO OPERATION

- ✓ A Berth is a facility within the Port of Cape Town that was previously utilised for special projects such as Rig repairs and off shore related activities
- ✓ In terms of location, A Berth is slightly **sheltered from the wind** as opposed to the Container Terminal
- ✓ In 2024 A Berth was **unlocked for Cargo Operations** and extended as a berth for Multi-Purpose Activities
- ✓ International Terminal, AGL Terminals, the back of quay tenant along with Licenced Terminal Operator FPT are currently operating on A Berth handling predominantly container vessels
- ✓ A Berth Terminal Operator and Tenant are at the initial stages of **procuring Mobile Harbour Cranes** for A berth which will result in improved productivity

AGENDA ITEM



01 TNPA Performance Review and Updates

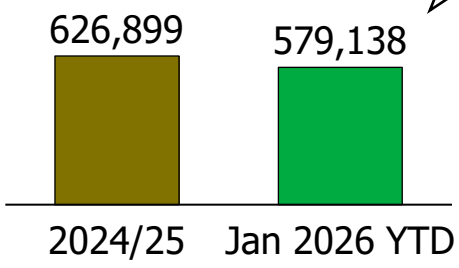
02 **TPT Performance Review and Updates**

03 TRIM Update

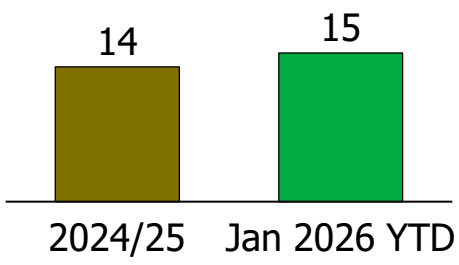
CTCT Performance

Volumes (TEUs)

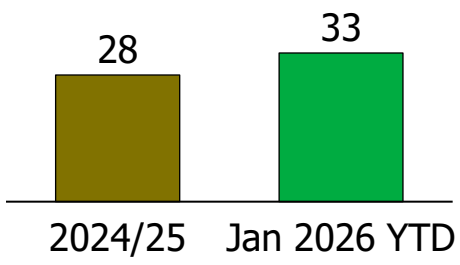
LE Volumes 688,158



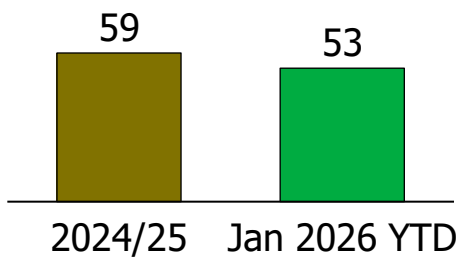
Moves per Gross Crane Hour (GCH)



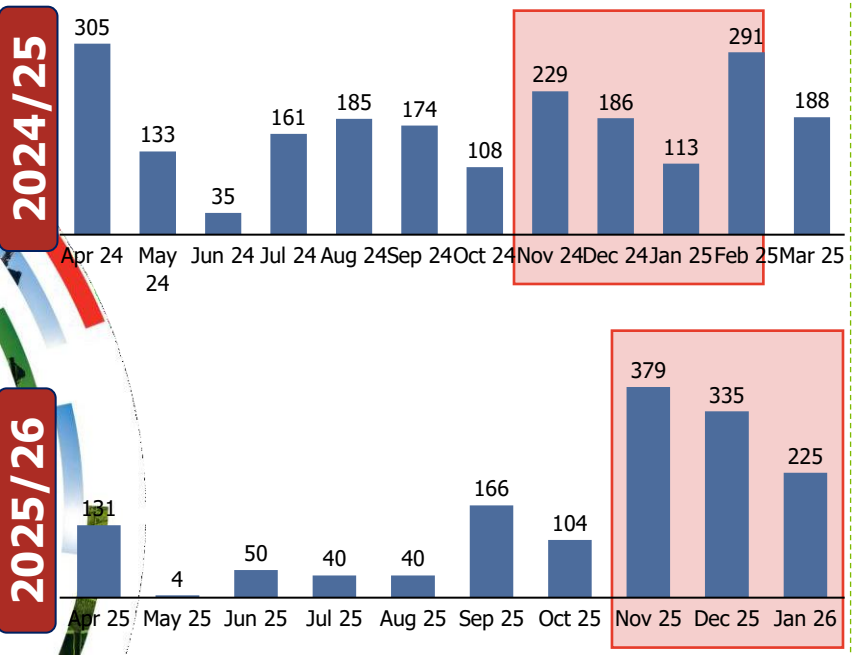
Moves per Ship Working Hour (SWH)



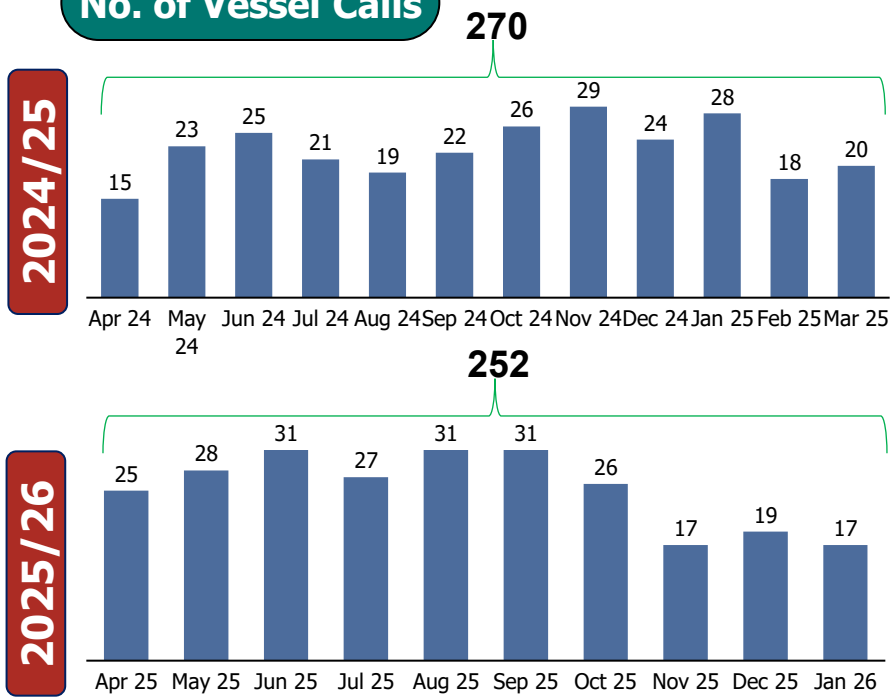
Truck Turnaround Time



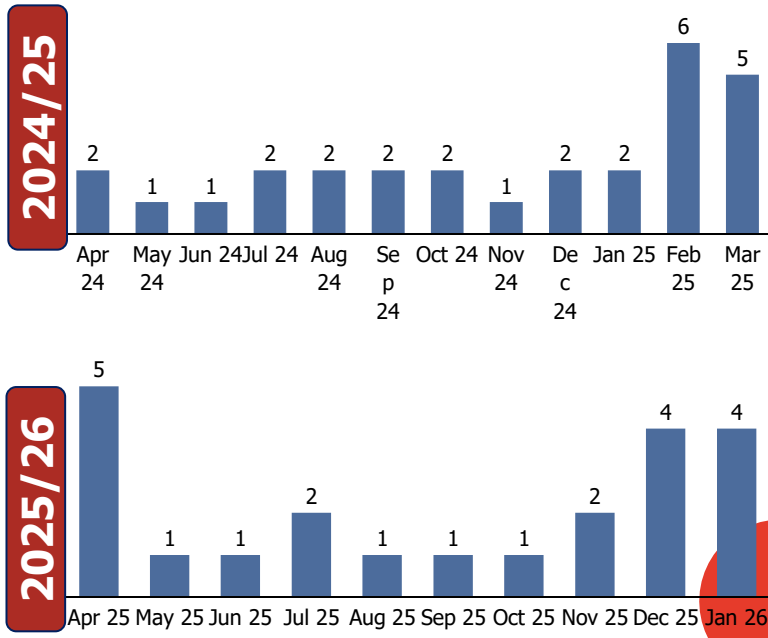
Weather Delays



No. of Vessel Calls



Vessels @Anchorage



Summary Action Item Updates

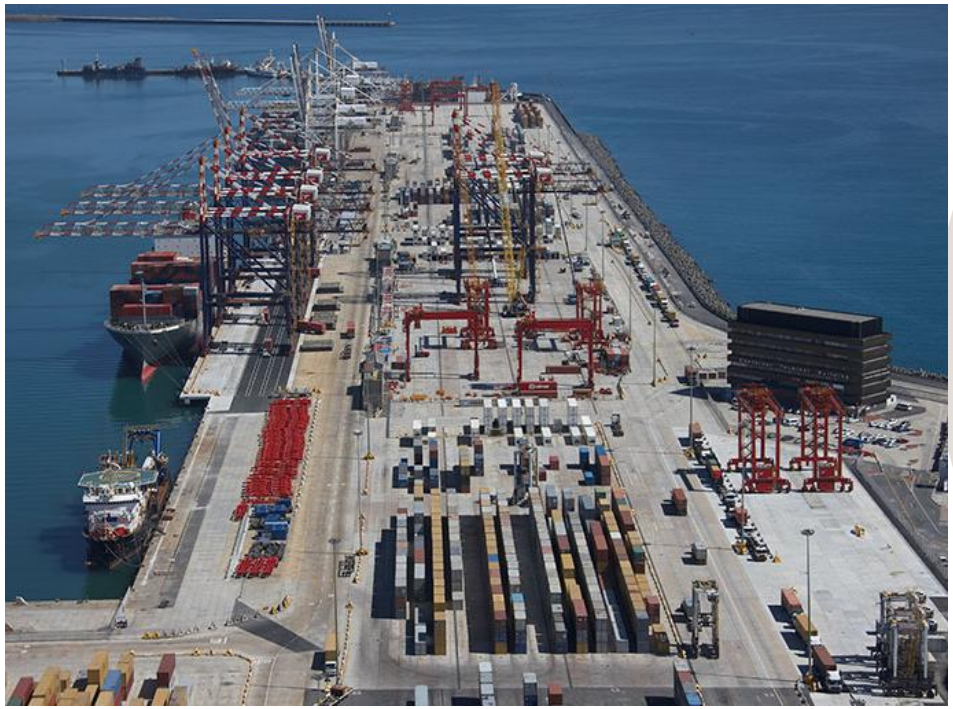
Red-Behind; **Yellow – In progress**; **Green - Complete**

Issue Raised	Action Taken	Status
Planning	- Provide planning support from other regions	
Operations	- Provide additional OLE resources from other regions	
Technical	- Provide technical support from HQ and other regions - Provide in stock spares from other regions - Provide additional OEM support on critical breakdowns	
Productivity (low)	-Re-align all support services and energy to increase productivity	

Key Priorities and Focus Areas

Weather	○ Managed wind recovery process within the 2 hrs protocol -Regular communication to all stakeholders ○ Adopted CSIR wind monitoring system. ○ - Landside - Operators continued working during windbound – Individual and Clusters ○ - Mobile wind meter being explored for West Coast reefers.
Planning	○ Revised planning of stacks and vessel load plans aligned to shipping line ETC's ○ Implemented back loading to optimise yard fluidity. ○ Deployed resources from EC and Durban to support ○ Yard Management – Deployed resources from EC to support ○ Created inclusive rail block and dumping stack during windbound.
Operations	○ Breakthrough initiatives to improve GCH /SWH : ○ Reduction of shifters - implemented housekeeping team to enhance fluidity ○ Hauler Optimisation deployment and monitoring ○ Refurbishment of STS crane lifts to mitigate start up times – End Feb 2026.
People	○ Reinstated transport for night shift by Friday 16 Jan ○ 7th gang mitigation plan - Recruitment - 32 port worker: 26 commenced working: 6 outstanding (MIE verification)
Customers	○ Intensified communication to All Customers and Stakeholders on terminal position • Regional Fruit Forum engagements on Mondays, and Thursdays. • National Fruit Forum engagements on Mondays and Thursdays. • Shipping line engagements held with MSC, Maersk and ONE Mondays and Thursdays. • Enhanced shipping line engagements to pre-plan to plan reefer forecasted moves inclusive of berthing prospects, Volume forecast, Stack dates ,LAR's, Load plan approvals and second plan strategy • Real time stakeholder updates via WhatsApp platforms.
Equipment	○ Managed urgency on repairs and maintenance to maximise equipment availability ○ Availability of spares to refurbish the STS spreaders – SOW currently in progress ○ Reliability improvement on STS cranes to continue from April 2026 to July 2026
Leadership Team	○ Continued Focussed leadership engagements

AGENDA ITEM



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03 **TRIM Update**

Transnet Rail Infrastructure Manager

Rail Reform – Changes in Transnet's Rail Business

PRE-RAIL REFORM

TRANSNET FREIGHT RAIL

- **Rail Operator**
  - Managing Rolling Stock and Rail Movement of Freight
- **Rail Infrastructure**
  - Investing and maintaining rail network

RAIL REFORM POLICY & LEGISLATION

- **White Paper on the National Rail Policy** – Mar 2022
- **Roadmap for the Freight Logistics System in South Africa** – Dec 2023
- **Draft Rail Private Sector Participation Framework** – Dec 2023
- **Economic Regulation of Transport Act 6 of 2024** – June 2024
- **Draft National Rail Bill**

POST-RAIL REFORM

TRANSNET FREIGHT RAIL (TFR)

- **Train Operating Company**
  - Managing Rolling Stock and Rail Movement of Freight

TRANSNET RAIL INFRASTRUCTURE MANAGER (TRIM)

- **Rail Infrastructure Manager**
  - Network Capital Investment, Maintenance & Security
  - Network Safety
  - TOC Open Access
  - Increase Rail Market Share

Overview Transnet Rail Infrastructure Manager
Core Foundations

PURPOSE

- ✓ To **provide efficient**, **reliable,** and **cost-effective rail infrastructure** to drive South Africa's **economic growth** by facilitating the migration of freight from road to rail.

MANDATE

- ✓ **Manage and maintain core rail infrastructure** (tracks, signals, bridges, tunnels, and stations).
- ✓ **Implement open-access** frameworks to encourage private-sector participation.
- ✓ **Promote integration** of rail with regional and national logistics supply chains.

STRATEGIC ROLE

- ✓ Enabler of Transformation: Transition freight logistics to rail-dominated systems.
- ✓ Infrastructure Modernisation: Invest in cutting-edge rail systems and technology.
- ✓ Economic Catalyst: Support industry competitiveness by reducing logistics costs.

STRATEGIC OBJECTIVES

- ✓ Optimise Rail Network Use, Efficiency and Density
- ✓ Rationalise underutilised lines.
- ✓ Facilitate Road-to-Rail Migration
- ✓ Ensure Financial Sustainability Through Access Fees, Concessions and Investment Models
- ✓ Enable Open Access and Foster Rail Efficiency and Competition

OPERATIONAL OBJECTIVES

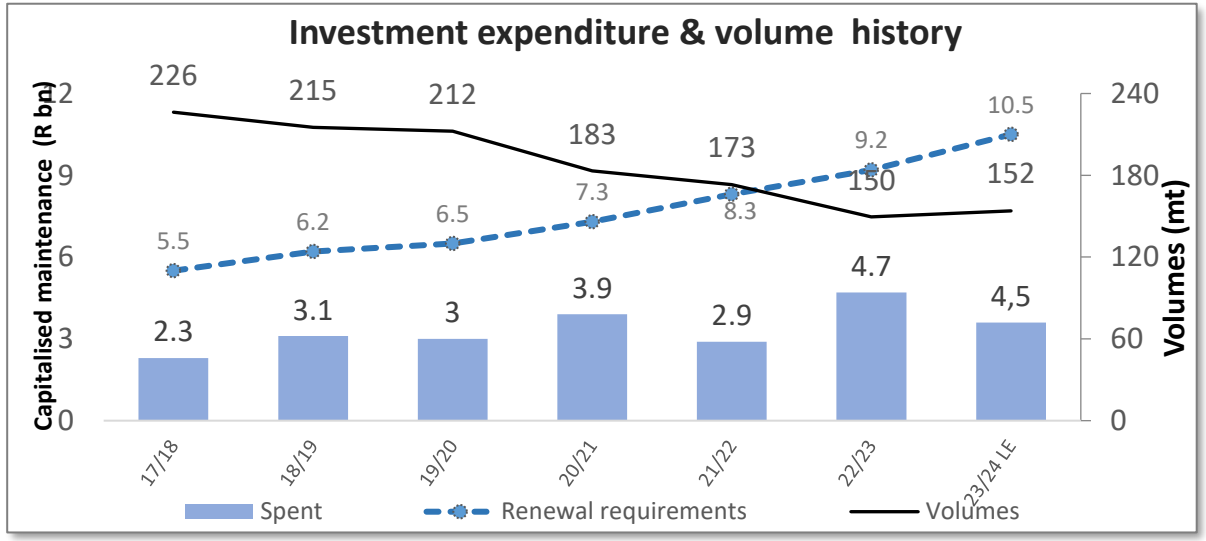
- ✓ Improve Network Service Reliability and Operational Effectiveness
- ✓ Prioritise Safety and Regulatory Compliance
- ✓ Rehabilitate, Expand and Modernise Rail Infrastructure
- ✓ Support and Align With Environmental Sustainability
- ✓ Integrate with Multimodal Logistics (Rail, Ports and Roads)

MANAGEMENT AND GOVERNANCE OBJECTIVES

- ✓ Optimise and Strengthen Asset and Risk Management
- ✓ Establish Transparent Governance
- ✓ Develop Workforce Capacity Through Training and Development
- ✓ Foster Government, Private Sector and Community Partnerships and Investment
- ✓ Lower Logistics Costs To Enhance Competitiveness

Case for change : State of the Network

The impact of inadequate network maintenance funding on rail volumes



Corridor view: Status per Engineering Discipline — Acceptable condition | Condition impaired | Degraded state

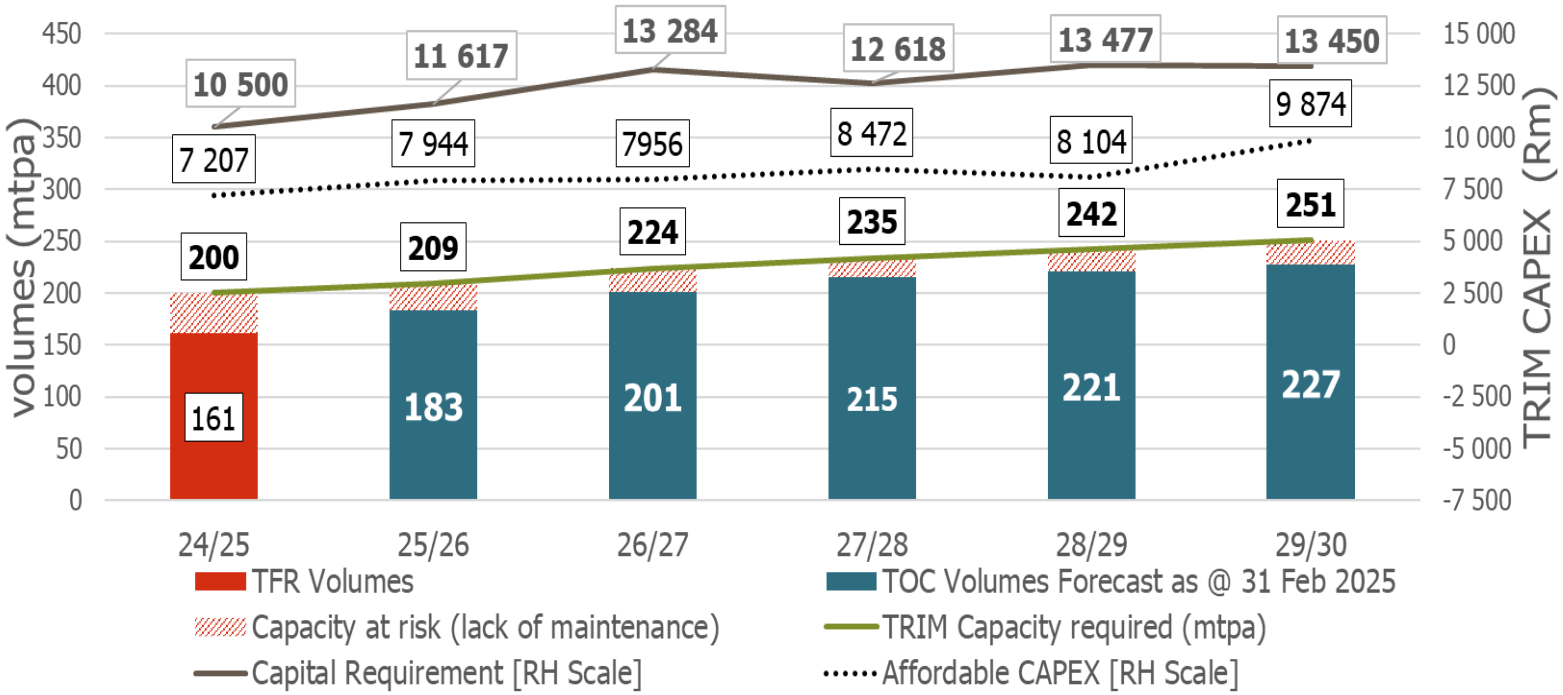
CORRIDOR	ORE CORRIDOR	NORTH CORRIDOR		CONTAINER CORRIDOR	CAPE CORRIDOR		CENTRAL	NORTH-EAST CORRIDOR		
Category		Coal Line	Lephalale – Ogies		Hotazel - PE	De Aar – CPT		Pyramid - Beitbridge	PHALA to RCB	Greenview - Kaapmuiden
Perway										
Structures (Bridges)										
Electrical								De-Electrified (Theft)	De-Electrified	
Train Authorisation										
Condition Assessment & Protection Systems										
Radio networks										
Transmission networks										
Offtrack (Service roads, etc.)										

NOTE: *Condition categorisation based on the latest Rail Network Condition Reports*

- Deteriorating levels of asset reliability & availability result **in safety risks**, **train delays, cancelled train slots, volume loss and eventual permanent capacity loss**;
- Derailments result in **loss of assets and redirection of maintenance budgets** which in this case may be newly acquired locomotives, wagons and customer product;
- Failure rates of the asset base is increasing. Failure rates increase exponentially at the **end of life of the asset**, or poorly maintained asset' causing a greater safety risk
- Majority of **Train Authorisation Systems are obsolete** (some are >60 years old). Train authorisation systems are central to the Train Control interface between the Infrastructure Manager (IM) and Train Operating Companies (TOCs)

Source: Transnet Rail Infrastructure Manager, 2025

TRIM 5 Year Maintenance Investment Plan Required to reach 250MT



***Assumptions**: The required funding will be sourced and be availed at least 12 months before the maintenance works must be executed to ensure that capacity is created in the year that the volume must be transported.*

TRIM will explore a multiple funding mechanisms including additional debt funding, access fees in some parts of the network, PSPs and short-term Private Sector Collaborative initiatives, Budget Facility for infrastructure (BFI) funding.

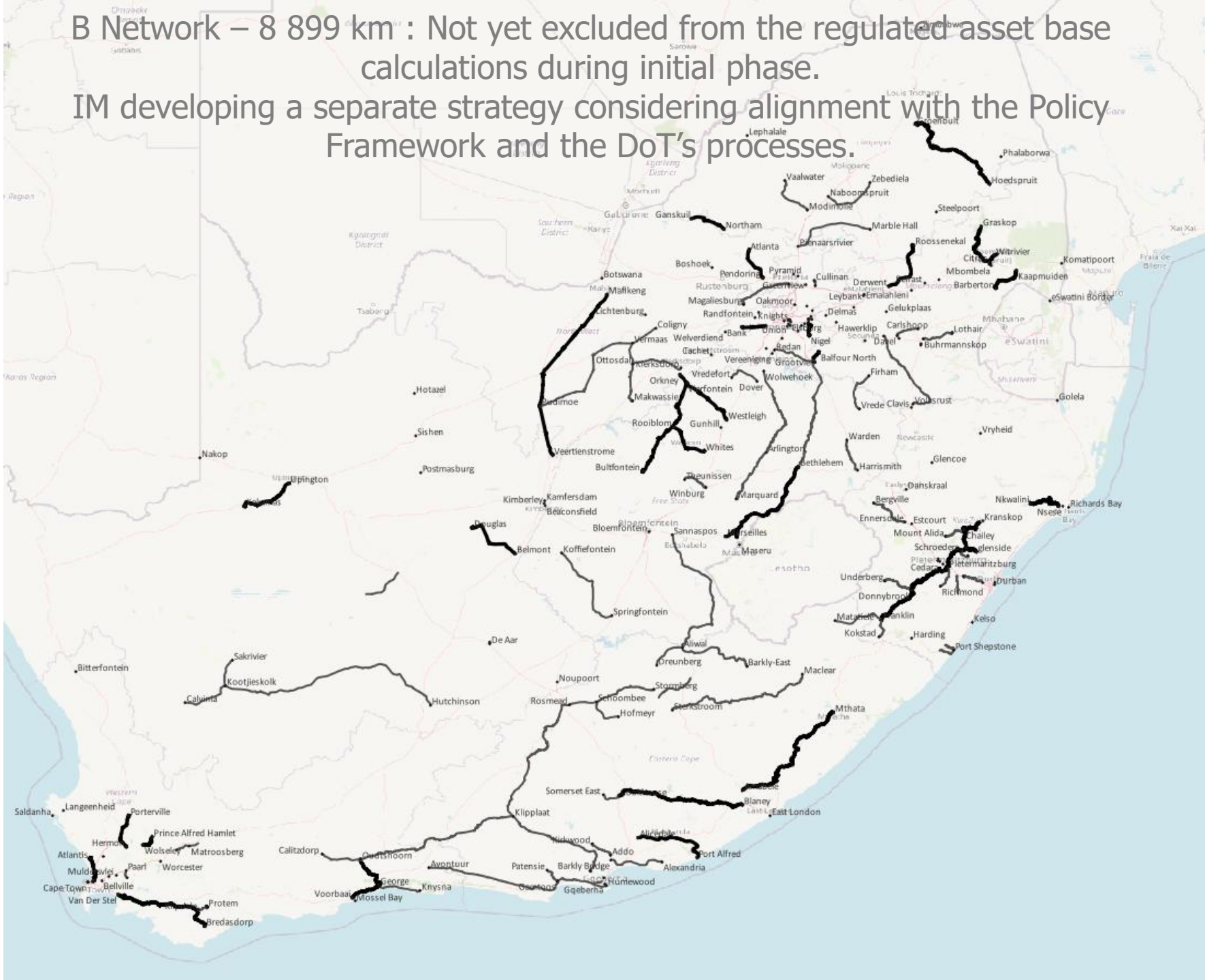
- To enable TRIM to achieve its target of creating capacity for 250MT, **Maintenance works must be carried out ahead of actual demand** to move traffic.
- Contracts and material orders must be placed at least **6 months before they will be required** across the country to allow for logistics and delivery thereof. If required funding is only received in the year the volume must be delivered, then the actual maintenance work will be delayed and if carried out will be for the following period's benefit. Timing of funding interventions therefore a key driver.
- Additional Investments in planning & monitoring tools, Condition monitoring tools, on track tacking and data collection equipment will be critical to. **improve condition monitoring, maintenance planning, traffic planning & control, forecasting, maintenance execution, data collection for improved planning**
- The required investment will change periodically due to changes in costs of materials, market prices and condition of the network.

Rationalised B Network

LOW DENSITY 8 899	**Low / No Freight Potential**	5 466
	Some Freight Potential	3 433

- ✓ Lines mostly closed or uplifted but some have limited freight potential
- ✓ Some opportunities for supporting agricultural clusters, tourism and people mobility exist, but density potential is low and will require significant subsidization.
- ✓ The National Rail Policy states that the State will collaborate with the IM to develop a PSP management framework
- ✓ The Transnet IM will continue custodianship in the interim, however funding, cost and income mechanisms will still need to be agreed upon.

B Network – 8 899 km : Not yet excluded from the regulated asset base calculations during initial phase.
IM developing a separate strategy considering alignment with the Policy Framework and the DoT's processes.



B Network Clusters

94 Lines

9 109 km

18 “Clusters” or Groups

Aliwal Group (AG)
Caledon Group (CG)
Calvinia (CA)
Eastern Cape (EC)
Ermelo North (EN)
Free State East (FE)
George Group (GG)
Grain Cluster (GC)
Klipplaat (KG)
KZN Central (KC)
KZN Central North (KN)
KZN Central South (KS)
Limpopo (LP)
Mbombela (MB)
Narrow Gauge Avontuur (NG)
PRASA Interest (PS)
Stormberg (SG)
Western Cape (WC)

Regulatory Guidelines

Section 6.14 of the National Rail Policy & Pg. 59-60 of Freight Logistics Roadmap

Policy Statement:

- The **central Planning Component** shall **Include** branchlines in the **National Rail Masterplan**.
- **Branchlines** will be **categorised** as **Strategic** and, by default, **Non Strategic.** The **criteria** that qualify a branchline as Strategic will be **determined** by the **DoT's central Planning Component** inline with the **DoT's Rail Branch Line Strategy**.
- **Private Sector investment** in **branchlines** will be included in the **Private Sector Participation Programme policy statement** contained in this document. Specifically, where **branchlines are strategic** and Government **cannot afford** to **investment**, they must be **put out for concessioning**.
- **Branchline operators** shall have **access** to the **core network**, **non-core network**, as well as **other branchlines** according the **Third Party Access policy** statement contained in this document.
- Any **Government** entity, or other **stakeholder** that wishes to **introduce a freight** and or **passenger** service on a state-owned **Strategic branchline**, **shall fund** the actual **costs** of **carrying** and **maintaining** the **branchline** by the **Infrastructure Manager**, as well as the actual **costs** of **operating trains**.
- Where a **branchline** is **inactive**, and requires **rehabilitation** to restore it to minimum **safe standards**, the **Government** entity or **stakeholder** shall also **fund** that **investment.**
- All such **rehabilitation** and **operation** shall be subject to the **oversight** of the **Railway Safety Regulator** (RSR), and ruling **access arrangements**, which access arrangements would eventually be **superseded** by the **TER**.
- The **Government** entity or **stakeholder** shall also **procure** at **train operator** under the **ruling access arrangements**, which **access arrangements** would eventually be **superseded** by the **Transport Economic Regulator** (TER)'s dispensation.
- **Municipalities** or any **Government entity** is **responsible** to **maintain and upgrade** municipal **sidings** and **associated** rail **infrastructure** under their control.

Approach for the Development of the B Network Strategy and Prospectus in line with the NRP & Freight Logistics Roadmap

- The National Rail Policy defines a separate process for the management of short-lines and Branchlines (B-Network)
- The Freight Logistics Roadmap requires for the IM to publish a Prospectus - interpreted as a "Network Statement" for the Branchlines.
- The IM is in the process of implementing the above policy imperatives
- IM implementing open access on A Network
- DOT released RFI, will evaluate and package appropriate procurement events
- Prospectus will be issued for B Network on RFI and then RFPs will be packaged.

THANK YOU