

Acknowledgements

This report was prepared by a team led by Martin Humphreys

ESA

Contents

6. The Prospects for the ESA Ports

Figure 33: Far East – Europe Capacity Share by Alliance.....50

Within the maritime industry, a key example
of halof irin

responsible for 15 percent of total monetary

function and compete successfully. The

1.1

2.

2013),⁵

Seaports along the ESA coast have evolved

3. 3. The Port Sector in East and Southern Africa

This Chapter provides an overview of the 15 ports in the study, their operational status, current capacity, and ongoing or planned expansion projects for each. It also provides an overview of the recent growth in volume handled by the ports, some comment on general trends in volumes, and aggregate predictions of future growth.⁷

3.1 A regional perspective

The 15 ESA ports in the study vary markedly in the core characteristics of total capacity, port area, available equipment, and connectivity. For example, the 0 05lene generth.

port of Mombasa via rail to Nairobi, with plans to extend to Kisumu and Malaba, and eventually to Kampala.

Table 3: Traffic Composition and Volume,

of the Indian Ocean, and is the most important

Mahajanga, Madagascar. The port of Mahajanga is a small regional port located on the west side of the island of Madagascar with

Port Louis, Mauritius. The port of Port Louis

a dedicated container berth, installa

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General Cargo
(tons)

571

terminal in Damerjog, including a liquefaction plant and a pipeline, which will enable the export of 3 million cubic meters of gas from Ethiopia in Phase I, 10 million m³ in Phase II. Ground breaking was expected in 2018 (Reuters, 2017).

The port of Lamu is part of the larger Lamu Port and South Sudan Ethiopia Transport

social-environmental studies are currently ongoing (Mauritius Ports Authority, 2018). Finally, the MPA is proceeding with the construction of a new cruise-terminal building, comprising a passenger terminal, commercial areas, and office space. The preliminary design has been completed, and the project is expected to start in June 2018, and be completed before the end of 2019 (Mauritius Ports Authority, 2018).

Mozambique. Each of the main ports of

average truck turnaround times. Again, the 'best' performing global container ports will

Figure 23

Figure 24:

Cape Town and Port Elizabeth, while Port
Louis and Maputo—

Figure 27: Average Waiting Time by Ports in 2015 (hours)

Figure 28

worst performers were

spatial and operational efficiency, while the ports of Maputo and Djibouti appear more efficient when evaluated on

time

total amount of conventional Ro-

47,500 tons to 52,700 tons. This is explained

(Figure 39). The average DWT decrease was approximately twice as large as

are also active in other ports on the continent.

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Currently all cargo to and from Toamasina is

The analysis also revealed mean processing times of 39 hours at Chirundu, 48 hours at Beitbridge, and 49 hours at Kasumbalesa,

maintenance, the condition of the road infrastructure is poor.

Mauritius

Infrastructure in Mauritius is well-developed, with the average quality of the roads high and almost 98 percent of them paved (OECD, 2014). The National Development Plan states the requirement for developing port access

section provides an overview of the
weaknesses identified in the 2016 (ES) 5 (GTC) - 5 (UG5 (i) al) 11 (e) 10 () JTJETQq0.00000912 0 612 792 re

Mozambique

- Some key po

Djibouti, Kenya and Zanzibar have a sub-

The Port Reform Toolkit (The World Bank
2007) notes that globally, vari1Bs ari1i.e/F1 12 T264()m(aarl)11e/F1 k

d ford he ri1i.anagbfpPort139(s)-4.()-89(T)-4(he)9(s)-4e/F1 k

1(aare k)12bv/F1 (s)-4ed(1(aon(16(a k)12dri132(v15(ri1B)si)6ri1B)7n(16(bv)4etween)-4(1(apubli)8(c)6

in the region. However, these main themes are considered essential to maximize the efficiency of any port in a given context.

Table 17 presents the key functions and responsibilities for the maritime sec

companies working as operators (Mauritius, South Africa). While neither is ideal, the latter, at least, offer the advantage of transparency with respect to the profits and costs of port operations, and avoid any implicit cross-subsidization.

Third, the national policy making and planning function, which would normally lie with the line m

Table 18: Preferred Port Tariff Structures

Tariff Item	Preferred Structure
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Port dues

5.5 Insufficient use of modern IT systems

Ports and shipping today cannot operate effectively without comprehensive

The implementation of PCSs, either in individual ports or as national systems, is

million tons above current capacity. In the

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combined with relatively high prices. With the new Kipevu Container Terminal now

Moroni handles no transship

The GDP multiplier (applied in step 5 above) is a factor representing the difference between the cargo growth and GDP growth in a country or region. Taking the example of containers, a GDP multiplier of 1.5 implies that for every one-percent

Forecasting transshipment is complex and

feeder ports along the eastern African coastline. Situated relatively close to each other, the port of Lamu is preferred over the

Table 19: Transshipment Assessment

Criteria	Unit
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to 6 million tons by 2050. General cargo capacity is also expected to be insufficient in

on this dataset, is the most technically efficient port, and ranks as the 43rd most efficient container port in the global sample. Dar es Salaam and Durban follow at the 64th and 70th positions respectively for container operations.

different service providers in Djibouti and asset-based Ethiopian trucking companies to provide their services to Ethiopian importers and exporters.

There is limited vertical integration in the port of Dar es Salaam, excepting the ICDs and container freight stations (CFSs) that are available

gate management systems. In other ports,

Second, despite the

improvement in port infrastructure and equipment needs to begin now.

Medium-

forcing operators to move a certain

considered to limit the port's impact on the local community:

- Install facilities to cater for the cold ironing of vessels calling the port of Nacala.

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Medium-term actions

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References

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017_compressed.pdf/747c203d-1cf9-4476-

Transnet (2016).

Annex A: The Review of the Institutional Framework

Table A1:

Contains corporate
governance and

Table A2: Overview of institutional roles and responsibilities in the ports sector

develop policies and
plans for the sector

Ministry
of
Transport

Ministry
of Finance

Communications

Terminal
development
function: develop
and maintain
superstructure

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