

Table of Contents

TABLE OF CONTENTS	5
EXECUTIVE SUMMARY	9
RECOMMENDATIONS	11
CHAPTER 1. PORT PERFORMANCE	13
The South African Port Context	13
Maritime connectivity	19
Durban in the national port system	28
Port efficiency	37
Hinterland connectivity	51
CHAPTER 2. PORT IMPACTS	57
Port-related employment	57
Port-related value added	58
Environmental and social impacts	68
CHAPTER 3. POLICIES AND GOVERNANCE	73
Governance of the port-city interface	73
Broader port sector regulatory framework	83
Corridor development	87
Port digout project	91
ANNEX 1: TIME EFFICIENCY OF PORTS	103
ANNEX 2: EFFICIENCY OF OIL PORTS	104
ANNEX 3: MULTISITE PORT EVOLUTION IN LARGE PORT CITIES	107
BIBLIOGRAPHY	113

Figures

1.1 Hinterland access issues for Sub-Saharan African Ports	15
1.2 The African container ports system (without Med-ports)	16
1.3 Cost to import a 20 foot container, 2012	18
1.4 Liner shipping connectivity index of African countries (2012)	20
1.5 Main routes servicing South African transhipment hubs	22