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| Port Market Study: Port of Mossel Bay (PoMSB) **Semi-structured interview guide:****Routing Survey**  **Garden Route District (GRD)****Current State vs Upgraded PoMSB Scenario** |  August 2025Version 1.0 |

# Introduction

As part of the Port of Mossel Bay Market Study commissioned by Transnet National Ports Authority (TNPA), Move Beyond Consulting (MBC), in collaboration with Rebel Ports & Logistics, has been appointed to undertake a comprehensive assessment of the port's market dynamics, future demand potential, and strategic growth pathways.

A key component of this study is the **Stakeholder Engagement**, which aims to foster inclusive participation, enhance collaboration, and gather critical insights from a wide range of stakeholders. These include existing and potential port users, government and regulatory bodies, industry representatives, civil society organisations, and other relevant actors in the port and logistics ecosystem.

Through structured interviews and surveys, the project team seeks to collect qualitative and quantitative data relating to:

* Port usage experiences,
* Operational and regulatory dynamics,
* Investment considerations and barriers,
* Sustainability and green transition priorities,
* Opportunities for innovation, industrial support, and market expansion.

Please see the attached Project Letter from TNPA for service context.

We are committed to ensuring that the stakeholder engagement process adheres to ethical standards. In line with this, we request your **informed consent** based on the following principles:

* **Voluntary Participation**: Your involvement in this engagement is entirely voluntary. You may withdraw your participation at any time without consequence.
* **Confidentiality and Anonymity**: All responses will be treated with strict confidentiality. Anonymity. Identifiable information will not be shared outside of the research team (MBC and Rebel), and findings will be anonymised or aggregated in all reporting.
* **Queries and Further Information**: If you have any questions or would like to follow up, please do not hesitate to contact your interviewer directly or Dr. Meena Lysko, the research team lead, at mbc.mlysko@gmail.com.

Please submit your completed form to mbc.mlysko@gmail.com

Do you agree to participate in this study?

[ ]  Yes [ ]  No

Do you agree to this interview being recorded?

[ ]  Yes [ ]  No

## For Internal Use: Background information of the interviewer/s

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| **Please complete the table below before the interview** |
| **Question** | **Answer** |
| Date  | Click or tap to enter a date. |
| Time  |  |
| Venue/ Format of interview |  |
| Name of interviewer/s from the project team | [ ] Dr Meena Lysko [ ] Ms Mpho M Monyane[ ] Mr Rhulani Madale | [ ]  Dr Henriette van Niekerk[ ]  Angelique du Toit[ ]  Johan-Paul Verschuure |

## Respondent Profile

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| **To understand the background and relevance of your organisation to this study, please provide the following general information** |
| **No.** | **Name** | **Company** | **Position/ designation** | **Involved in agriculture or logistics in Mossel Bay?** |
| 1 |  |  |  | Choose an item. |
| 2 |  |  |  | Choose an item. |
| 3 |  |  |  | Choose an item. |
| **Contact** | Name, email, tel. |

# This survey has THREE parts:

# A. The short PRELIM section captures commodity & absolute volumes

# B. Current state of your flows today

# C. Scenario of an Upgraded Port of Mossel Bay (PoMSB)

# A. PRELIM – Commodity & Absolute Volume

|  |  |
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|  | **Primary commodity category for this response** (if you would like to indicate more than one commodity please complete a new form) |
|  | Choose an item.If not on the drop-down list ☐Other (specify): Click or tap here to enter text. |
|  | **Flow of commodity** (choose one) |
|  | [ ]  Export of listed primary commodity[ ]  Import of listed primary commodity |
|  | **Primary Garden Route District (GRD) origin/destination sub-area** (choose one) |
|  | [ ]  George[ ]  Mossel Bay[ ]  Knysna[ ]  Bitou / Plettenberg Bay[ ]  Oudtshoorn[ ]  Hessequa / Riversdale[ ]  Kannaland / Ladismith[ ]  Multiple |
|  | **Have you previously considered using Mossel Bay or a nearby port for your logistics?** |
|  | [ ]  Yes – actively evaluated[ ]  Yes – briefly considered[ ]  No – never considered[ ]  Not applicable |
|  | **Do you expect your cargo volumes to grow in the next 5 to 10 years?** |
|  | [ ]  YesIf yes, please quantify/provide a projection/elaborateClick or tap here to enter text.[ ]  No |
|  | **What role could Mossel Bay play in expanding your access to markets? (Tick all that apply)** |
|  | [ ]  Improve access to SADC[ ]  Shorten time to Middle East[ ]  Serve niche or seasonal exports[ ]  Decongest other ports[ ]  Domestic coastal logistics[ ]  Other (please specify): Click or tap here to enter text. |
|  | **Mode for transport of goods to/from port?** |
|  | [ ]  Road[ ]  Rail[ ]  Coastal shipping[ ]  Other (please specify): Click or tap here to enter text. |
|  | **Absolute volume for this flow (over last 12 months as indicative) – choose unit and provide numbers** |
|  | **Choose unit:** Choose an item.**Annual volume:** Click or tap here to enter text.**Average monthly volume:** Click or tap here to enter text.**Peak month & volume:** **Month:** Choose an item.**Volume in peak month:** Click or tap here to enter text. |

# B. Current State (today’s flows)

|  |  |
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|  | **Which port do you primarily use today for this flow?** |
|  | [ ]  Port of Cape Town - PoCT[ ]  Port of Gqeberha - PE[ ]  Port of Ngqura (Coega) - Ngqura[ ]  Port of Mossel Bay - PoMSB[ ]  Port of Durban - DBN[ ]  Other South African seaport (please specify): Click or tap here to enter text.[ ]  Split across multiple seaports |
|  | **If split, indicate the current share by port (choose closest band per port)** |
|  | PoCT: [ ]  ≥70% [ ]  50–69% [ ]  30–49% [ ]  10–29% [ ]  <10% [ ]  0%PE: [ ]  ≥70% [ ]  50–69% [ ]  30–49% [ ]  10–29% [ ]  <10% [ ]  0%Ngqura: [ ]  ≥70% [ ]  50–69% [ ]  30–49% [ ]  10–29% [ ]  <10% [ ]  0%PoMB: [ ]  ≥70% [ ]  50–69% [ ]  30–49% [ ]  10–29% [ ]  <10% [ ]  0%DBN: [ ]  ≥70% [ ]  50–69% [ ]  30–49% [ ]  10–29% [ ]  <10% [ ]  0%Other: [ ]  ≥70% [ ]  50–69% [ ]  30–49% [ ]  10–29% [ ]  <10% [ ]  0% |
|  | **Weekly departures (current primary port)** |
|  | Choose an item. |
|  | **On-time performance (last 90 days, current primary port)** |
|  | Choose an item. |
|  | **Reefer & cold-chain (if applicable)** |
|  | Choose an item. |
|  | **Dangerous Goods (DG) handling (if applicable)** |
|  | Choose an item. |
|  | **Shipment type mix for this flow (share bands)** |
|  | FCL (Full Container Load): [ ]  ≥70% [ ]  50–69% [ ]  30–49% [ ]  10–29% [ ]  <10% [ ]  0%LCL (Less‑than‑Container Load): [ ]  ≥70% [ ]  50–69% [ ]  30–49% [ ]  10–29% [ ]  <10% [ ]  0%Breakbulk / Out‑of‑Gauge: [ ]  ≥70% [ ]  50–69% [ ]  30–49% [ ]  10–29% [ ]  <10% [ ]  0% |
|  | **Less-than-Container Load (LCL) & degroup (if applicable)**“degroup time” is the hours from vessel discharge (or container arrival at the depot) until your LCL freight is ready to collect. |
|  | Choose an item. |
|  | **For FCL shipments (if applicable) – container and VGM details** |
|  | Typical container types: [ ]  20' [ ]  40' [ ]  40'HC [ ]  40'RH [ ]  Other: \_\_\_\_\_\_Typical payload weight band: [ ]  <15t [ ]  15–22t [ ]  22–26t [ ]  26–28t [ ]  >28tVGM method: [ ]  Weighbridge ticket [ ]  Verified method 2 (calculation) [ ]  Other: \_\_\_\_\_\_Usual VGM/cargo/docs cut‑off compliance: [ ]  Always on time [ ]  Occasionally tight [ ]  Frequently tight |
|  | **FCL free time at current port (demurrage & detention combined)** |
|  | Choose an item. |
|  | **Stack‑window reliability for your FCL exports (current)** |
|  | Choose an item. |
| 1.
 | **Export cut-off buffer you realistically achieve (current)** |
|  | Choose an item. |

# C. If PoMSB were upgraded for service

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| **Assume: container/MPT berth, on-dock reefer park, basic DG storage (5.1 & 8), bonded depot, 24/7 gate, Customs & Port Health on-site, near-dock cold store, and at least weekly feeder.** |
|  | **Overall appetite to shift (context)** |
|  | Choose an item. |
|  | **Steady-state share (%) via PoMSB (post-ramp) (context)** |
|  | Choose an item. |
|  | **Inland time saving vs best alternative (GRD→PoMSB vs CPT/PE)** |
|  | Choose an item. |
|  | **Inland cost saving vs best alternative (per FTL/TEU)** |
|  | Choose an item. |
|  | **Minimum sailing frequency required at PoMSB?** |
|  | Choose an item. |
|  | **On-time performance threshold (90-day)** |
|  | Choose an item. |
|  | **Cut-off buffer needed at PoMSB** |
|  | Choose an item. |
|  | **Inspection lead time (PPECB/Port Health) – acceptable** |
|  | Choose an item. |
|  | **Reefer headroom & cold-store slot (combined)** |
|  | Choose an item. |
|  | **DG handling capability at PoMSB – minimum acceptable** |
|  | Choose an item. |
|  | **Heavy-lift / yachts – requirement** |
|  | Choose an item. |
|  | **LCL & degroup – minimum acceptable** |
|  | Choose an item. |
|  | **Independent alternatives at PoMSB (lines + depots)** |
|  | Choose an item. |
|  | **Cost break-even (per TEU/ton) – context** |
|  | Choose an item. |
|  | **Time break-even if PoMSB is faster – hours & premium – context** |
|  | Choose an item. |
|  | **Preconditions for shifting volume (tick top 3)** |
|  | [ ]  Weekly feeder fixed window[ ]  Reefer plug park & near-dock cold store[ ]  DG 5.1 & 8 with SOPs[ ]  24/7 gate & staging[ ]  Customs + Port Health on-site[ ]  Bonded depot / LCL on-site[ ]  Heavy-lift/yacht agents[ ]  Alternative depots/lines |

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|  | **Would you be willing to participate in a follow-up interview or stakeholder roundtable?** |
|  | [ ]  Yes[ ]  No[ ]  Will delegate to someone else If delegating, please provide contact information Name: Click or tap here to enter text.Contact email: Click or tap here to enter text.Contact number: Click or tap here to enter text. |

Thank you.

Please submit your completed form to mbc.mlysko@gmail.com