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| Port Market Study: Port of Mossel Bay (PoMSB)  **Semi-structured interview guide:**  **Agriculture Logistics  Key Stakeholders** | July 2025  Version 2.0 |

# 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 Plan**, 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](mailto:mbc.mlysko@gmail.com?subject=PoMSB%20Survey%20Response%20for%20Offshore)

Do you agree to participate in this study?

Yes  No

Do you agree to this interview being recorded?

Yes  No

## 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. |

# A. Strategic Interest and Growth Opportunity

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| **Current and potential involvement in agriculture, agro-processing, and agri-logistics, and how the Port of Mossel Bay could play a role in enabling market access and value chain expansion** | |
|  | **What is your organisation’s current involvement in agriculture or agri-logistics? (Tick all that apply)?** |
|  | Agricultural production  Agro-processing  Agri-logistics  Cold chain distribution  Export (direct)  Export (via 3rd party)  Other (please specify): Click or tap here to enter text. |
|  | **What is your current (or planned) production capacity in tons/year?**  *(Indicate estimated commissioning date if not operational)* |
|  |  |
|  | **Where are your current or planned production sites located?**  *(Please provide site names and provinces)* |
|  |  |
|  | **Have you previously considered using Mossel Bay or a nearby port for agri-export or coastal logistics?** |
|  | Yes – actively evaluated  Yes – briefly considered  No – never considered  Not applicable |
|  | **What are the primary target markets for your production?** |
|  | Domestic consumption  Export via port (specify): Click or tap here to enter text.  Other (please specify): Click or tap here to enter text. |
|  | **Which demand nucleus determines the financial success or failure of the submitted/intended project?** |
|  | International  Domestic  Regional (e.g. SADC)  Local  Other (please elaborate): Click or tap here to enter text. |
|  | **Do you expect your cargo volumes to grow in the next 5 to 10 years?** |
|  | Yes  If yes, please quantify/provide a projection/elaborate  Click 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. |
|  | **Which of your agri-products or value chains are best suited for Mossel Bay? (Tick all that apply)** |
|  | Fruit  Grains/cereals  Livestock/meat  Dairy  Wine/beverages  Frozen/perishable goods  Flowers/horticulture  Other (please specify): Click or tap here to enter text.  Please elaborate: Click or tap here to enter text. |
|  | **What operational risks or constraints do you foresee at the port (e.g. space limitations, safety compliance, grid constraints, water)?** |
|  |  |
|  | **From your perspective, what makes PoMSB an attractive/less attractive location for agri-logistics?** |
|  |  |
|  | **Mode for transport of goods to/from port?** |
|  | Road  Rail  Coastal shipping  Other (please specify): Click or tap here to enter text. |

# B. Infrastructure Suitability and Technical Requirements

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| **Current and anticipated infrastructure needs and technical/environmental considerations for effective port-linked operations.** | |
|  | **What infrastructure would be most valuable for your operations at or near the port? (Tick all that apply)** |
|  | Cold storage  Reefer container handling  Agri-bulk handling  Containerised cargo  PPECB or veterinary inspection zones  Rail-road consolidation depot  Dedicated agri-logistics zone  Other (please specify): |
|  | **Would your operations require new infrastructure, or could you use existing facilities?** |
|  | Existing facilities could be adapted  New custom-built facilities are needed  Not sure  Other (please specify): |
|  | **What technical/environmental requirements must be addressed? (Tick all that apply)** |
|  | Phytosanitary inspections  Cold chain integrity  Fumigation zones  Animal health inspection  Wastewater/runoff controls  HACCP/hygiene certification  Other (please specify): |
|  | **Have you faced any challenges with the process or turnaround time relating to port access?** |
|  |  |
|  | **What are the barriers to gaining approval or access (technical, regulatory, procedural)?** |
|  |  |
|  | **Would you be willing to co-invest in infrastructure, or are you seeking landlord or state-provided capital?** |
|  | Willing to co-invest in infrastructure Please indicate amount: Click or tap here to enter text.  Seeking landlord provided capital  Seeking alternate funding for capital Please indicate amount: Click or tap here to enter text.  Other (please specify): |
|  | **Are there any limitations in draft, quay length, vessel size, or landside storage that constrain or may constrain your operations?** |
|  |  |
|  | **What hinterland infrastructure (rail, road, pipeline) is/would be critical for your logistics chain?** |
|  |  |
|  | **Does the effectiveness of the project rely on the nearness to the Port of Mossel Bay?** |
|  | Yes  No  Maybe  Please explain: Click or tap here to enter text. |
|  | **How do you assess the port's current pricing structure (tariffs, handling fees, marine charges)?** |
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|  | **What would influence you to switch cargo or vessel calls to Mossel Bay from another port?** |
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|  | **Do you have any recommendations for improving the implementation and stakeholder interface processes at PoMSB?** |
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# C. Investment Appetite and Participation Model

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| **Organisation readiness to expand and appetite to engage in port-based investment models, co-development of infrastructure, or value chain clustering at or near the port.** | |
|  | **Are you planning to expand production, processing, or exports in the next 3–5 years?** |
|  | Yes – secured and planned  Likely – evaluating feasibility  No immediate plans  Not applicable |
|  | **Would you be interested in participating in port-anchored investment models? (Tick all that apply)** |
|  | Cold chain infrastructure partnership  Co-investment in logistics platforms  Lease of agro-processing space  Export corridor cluster  Not interested currently  Other (please elaborate): Click or tap here to enter text. |
|  | **Preferred form of partnership:** |
|  | Public-private lease  Anchor operator  Co-operative export model  No preference  Other (please specify): Click or tap here to enter text. |
|  | **Are there international partners, financiers, or offtakers already linked to your project?** |
|  | Yes  If yes, please briefly describe the nature of the relationship (e.g. offtake agreement, equity investment, joint venture, technical advisory)  Click or tap here to enter text.  No |
|  | **Are there institutional investors, DFIs, or OEMs you typically work with to scale agricultural infrastructure?** |
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|  | **How is your organisation currently navigating regulatory or safety uncertainty (e.g. internal guidelines, external consultants, international benchmarks)?** |
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# D. Risk Management and Sector Constraints

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| **Focus on logistical, operational, and certification-related risks that affect the agri-export activities. What support mechanisms or partnerships could help mitigate these risks at Mossel Bay.** | |
|  | **How does your organisation currently manage the following risks? (Tick relevant and briefly explain)** |
|  | Infrastructure gaps (e.g. reefer shortage): Click or tap here to enter text.  Logistics delays (e.g. road congestion): Click or tap here to enter text.  Seasonal volatility or cold chain loss: Click or tap here to enter text.  Certification & documentation complexity: Click or tap here to enter text.  Labour, load-shedding, or biosecurity disruptions: Click or tap here to enter text.  Other (please specify): Click or tap here to enter text. |
|  | **What support or partnerships at PoMSB would help mitigate these risks? (Tick all that apply)** |
|  | Better inspection and certification services  Reliable cold chain handling  Improved road/rail integration  Shared logistics hubs  Coordinated customs clearance  Other (please specify): Click or tap here to enter text. |

# E. Institutional Engagement and Policy Alignment

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| **Experience working with regulatory or support institutions and views on the policy changes needed to unlock growth in agri-logistics through Mossel Bay** | |
|  | **Have you engaged with the following institutions? (Tick all that apply)** |
|  | DALRRD  PPECB  TNPA  Agricultural Export Council  Local Municipality  Western Cape Government  Other (please specify): Click or tap here to enter text. |
|  | **What policy improvements could unlock agri-growth via Mossel Bay? (Tick all that apply)** |
|  | Inspection efficiency (PPECB/vet)  Access to infrastructure grants  Port-user zoning for agri-exports  Reduced turnaround times  Skills development incentives  Other (please specify): Click or tap here to enter text. |
|  | **Are you familiar with current agri-logistics or port investment plans for Mossel Bay?** |
|  | Yes – well informed  please elaborate: Click or tap here to enter text.  Yes – vaguely aware  please elaborate: Click or tap here to enter text.  No – unaware  Not applicable |

# F. Community Impact and Skills Development

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| **Potential for job creation, smallholder inclusion, and skills development in the region.** | |
|  | **Would your operations create new jobs in the following areas? (Tick all that apply)** |
|  | Packing/grading  Cold chain logistics  Export documentation  Equipment handling  Other (please specify): Click or tap here to enter text. |
|  | **Are you currently working with any of the following?** |
|  | Local agri-SMMEs  Emerging farmers  Cooperatives  Not yet, but open to partnerships |
|  | **Would you support skills development or training?** |
|  | Yes – in-house  Yes – with academia  Possibly  No – not a current priority |

# G. Market Demand and Export Readiness

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| **Current market reach, export scheduling, organisation readiness to use Mossel Bay as a logistics or export node if appropriate facilities were made available.** | |
|  | **What export markets are you serving or targeting? (Tick all that apply)** |
|  | SADC  Africa  Middle East  Europe  Asia  North America  South America |
|  | **Do you have confirmed buyers or partners that could use Mossel Bay as a logistics node?** |
|  | Yes – immediate potential  Possibly – with shorter lead times  No – existing routes preferred  Not applicable |
|  | What is your typical shipping or seasonal cycle? |
|  | Monthly  Quarterly  Seasonal peaks  Irregular  Other (please specify): Click or tap here to enter text. |
|  | **If port upgrades were approved, how long would you need to shift operations to Mossel Bay?** |
|  | less than 6 months  6 to 12 months  12 to 24 months  more than 2 years  Not feasible |

# H. Economic Contribution and Growth Forecasts

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| **Quantify the current and potential economic impact of your agri-logistics operations, including revenue, job creation, cargo volumes, and downstream value chain effects.** | |
|  | **What is your organisation’s approximate annual revenue from agriculture or agri-logistics activities?** |
|  | < R10 million  between R10 million and R50 million  between R51 million and R200 million  > R200 million  Prefer not to say |
|  | **What is your estimated annual revenue in the next 5–10 years if Mossel Bay becomes a viable logistics or export hub for your operations?** |
|  | < R20 million  between R20 million and R100 million  between R101 million and R300 million  > R300 million  Too early to estimate |
|  | **How much volume could your organisation route through Mossel Bay under optimal infrastructure conditions?** |
|  | < 5,000 tons/year  5,000–20,000 tons/year  20,000–50,000 tons/year  > 50,000 tons/year  Not applicable / unknown |
|  | **Please provide details on the indicative optimum throughput of your intended project, based on its specific KPIs.** |
|  | Volume (e.g. tonnes/year, TEUs, energy units):  Click or tap here to enter text.  Number of port calls/year (if applicable): Click or tap here to enter text. |
|  |  |
|  | **How many full-time equivalent (FTE) jobs are currently supported by your organisation in relation to agriculture or agri-logistics?** |
|  | 1 to 10  11 to 50  51 to 200  more than 200  Prefer not to say |
|  | **Which other actors in your value chain would benefit from improved port logistics at Mossel Bay?** |
|  | Local SMMEs (e.g., transporters, packhouses)  Agro-processors  Exporters / traders  Cold chain or storage providers  Farmers or outgrowers  Other (please specify): Click or tap here to enter text. |
|  | **Would the financial success of your project contribute to any of the following? Please explain?** |
|  | Profitability of your business  Local community upliftment  National/regional economic growth  Job creation  Local education or schools  Skills development or training  Other: Click or tap here to enter text.  Please explain: Click or tap here to enter text. |
|  | **If port infrastructure or logistics improvements reduce time-to-market or spoilage, what impact would this have on your operating margins or profitability?** |
|  | Significant improvement (>10%)  Moderate (5–10%)  Minor (<5%)  No measurable impact  Not sure |
|  | **How does your business contribute towards green energy and decarbonisation?** |
|  | Click or tap here to enter text. |
|  | **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. |

Please submit your completed form to [mbc.mlysko@gmail.com](mailto:mbc.mlysko@gmail.com?subject=PoMSB%20Survey%20Response%20for%20Offshore)