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

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 shipping, logistics or port-linked activities in Mossel Bay?** |
| 1 |  |  |  | Choose an item. |
| 2 |  |  |  | Choose an item. |
| 3 |  |  |  | Choose an item. |

# A. Port Usage and Commodities

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| **This section helps us understand your current use of the Port of Mossel Bay, including types of cargo handled, transport modes, and challenges you may experience.** |
|  | **What is your company’s primary business activity?** |
|  | [ ]  Shipping line[ ]  Freight forwarder[ ]  Logistics service provider[ ]  Other (please specify): Click or tap here to enter text. |
| 1.
 | **Do you currently use the Port of Mossel Bay?** |
|  | [ ]  Yes[ ]  No**If yes, what commodities do you transport through the Port of Mossel Bay?** *(tick all that apply)***:**[ ]  Crude oil / refined petroleum[ ]  Breakbulk (e.g., steel, timber)[ ]  Containerised cargo[ ]  Agricultural products[ ]  Fishing industry cargo[ ]  Offshore energy support cargo[ ]  Other (please specify): Click or tap here to enter text. |
| 1.
 | **If you currently use ports other than Mossel Bay, which of the following ports do you use? (Tick all that apply)** |
|  | [ ]  Saldanha Bay[ ]  Port of Cape Town[ ]  Port Elizabeth (Gqeberha)[ ]  Ngqura[ ]  East London[ ]  Durban[ ]  Richards Bay[ ]  Not applicable – we only use Mossel Bay[ ]  Other (please specify): Click or tap here to enter text. |
|  | **What commodities do you transport through these other ports? (Tick all that apply)** |
|  | [ ]  Crude oil / refined petroleum[ ]  Breakbulk (e.g. steel, timber)[ ]  Containerised cargo[ ]  Agricultural products[ ]  Fishing industry cargo[ ]  Offshore energy support cargo[ ]  Other (please specify): Click or tap here to enter text. |
|  | **What are the key reasons for using the selected alternative port/s? (Tick your top 3 reasons)** |
|  | [ ]  Proximity to our production site or markets[ ]  Better port facilities or infrastructure[ ]  Faster turnaround time or vessel berthing[ ]  Lower port charges[ ]  Higher cargo volumes or shipping frequency[ ]  More reliable customs and regulatory processes[ ]  Established logistics chain with warehousing or depots[ ]  Rail connectivity[ ]  Other (please specify): Click or tap here to enter text. |
|  | **What are the typical annual cargo volumes through Mossel Bay?** |
|  | Inbound: Click or tap here to enter text. tonnes/yearOutbound: Click or tap here to enter text.tonnes/year |
|  | **What are the typical annual cargo volumes (tonnes/year) through other ports? Please specify for each port.** |
|  | Inbound: Click or tap here to enter text.Outbound: Click or tap here to enter text. |
|  | **How many full-time equivalent (FTE) jobs are currently supported?** |
|  | [ ]  1 to 10[ ]  11 to 50[ ]  51 to 200[ ]  more than 200[ ]  Prefer not to say |
|  | **How many new FTE jobs would you expect to create if infrastructure and services at the Port of Mossel Bay are improved?** |
|  | [ ]  1 to 10[ ]  11 to 50[ ]  51 to 200[ ]  more than 200[ ]  Too early to estimate |
|  | **How many indirect jobs or business opportunities could your project support through partnerships (e.g. SMMEs, cooperatives, training)?** |
|  | [ ]  0–5[ ]  6–20[ ]  21–50[ ]  More than 50[ ]  Too early to estimate |
|  | **If relevant, what is/are your mode for transport of goods to/from your current ports of choice port?** |
|  | [ ]  Road[ ]  Rail[ ]  Coastal shipping[ ]  Pipeline[ ]  Other (please specify): Click or tap here to enter text. |
|  | **Indicate your product/s location origin/s and the corresponding choice of port/s to export.** |
|  | Click or tap here to enter text. |

# B. Future Demand and Growth Potential

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| **This section explores your expectations and requirements regarding future cargo volumes, infrastructure needs, and growth opportunities.** |
|  | **What are the projected cargo volumes in the next 5 years, in tonnes/year? Please specify for each port.** |
|  | Inbound: Click or tap here to enter text.Outbound: Click or tap here to enter text. |
|  | **Do you expect to increase your use of Mossel Bay port in the next 5–10 years?** |
|  | [ ]  Yes[ ]  No[ ]  Uncertain |
|  | **What types of incentives would most likely encourage you to shift more cargo to Mossel Bay? (Tick up to 3 of the most relevant to your business)** |
|  | [ ]  Market growth[ ]  Local industrial expansion[ ]  Better infrastructure or port facilities[ ]  Cost competitiveness[ ]  Policy/regulatory changes[ ]  Dedicated handling or berthing facilities[ ]  Investment support or co-financing infrastructure (e.g., storage, access roads)[ ]  Improved road or rail connectivity to hinterland[ ]  Access to environmental or green shipping incentives[ ]  Other (please specify): Click or tap here to enter text. |
|  | **What services or facilities would encourage future use of the Port of Mossel Bay?** *(tick all that apply)* |
|  | [ ]  Container terminal[ ]  Cold storage[ ]  Expanded berths[ ]  Faster customs clearance[ ]  Multi-modal linkages[ ]  Lower charges [ ]  Other (please specify): Click or tap here to enter text. |
|  | **If such incentives/services/facilities were introduced, how much of your cargo would you consider shifting to Mossel Bay?** |
|  | [ ]  <10%[ ]  10–25%[ ]  26–50%[ ]  >50%[ ]  Not applicable / Not interested[ ]  Too early to estimate |
|  | **Are there any untapped market opportunities you foresee for Mossel Bay in shipping and/or logistics?**  |
|  | Click or tap here to enter text. |
|  | **How dependent is your growth plan on improved infrastructure or service delivery at the Port of Mossel Bay?** |
|  | [ ]  Very dependent – growth will not occur without it[ ]  Moderately dependent – will affect scope/timing[ ]  Not dependent – plans are independent of the portPlease elaborate: Click or tap here to enter text. |
|  | **Does the effectiveness of the services rely on proximity to the Port of Mossel Bay? Please elaborate.** |
|  | [ ]  Yes[ ]  No[ ]  Maybe Please explain: Click or tap here to enter text. |

# D. Inputs for Demand Modelling

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| **This section collects structured inputs that will support the development of an econometric model for forecasting demand at the port.** |
|  | **Top 3 commodities of interest for Mossel Bay (current or future)?** |
|  | 1. Click or tap here to enter text.2. Click or tap here to enter text.3. Click or tap here to enter text.Expected CAGR (Compound Annual Growth Rate) for each commodity (in %): Commodity 1: Click or tap here to enter text.% Commodity 2: Click or tap here to enter text.% Commodity 3: Click or tap here to enter text.% |
|  | **What are the most important drivers of demand growth for your organisation?** *(please indicate your top 3)* |
|  | [ ]  Regional GDP growth[ ]  Population growth[ ]  Industrial development in hinterland[ ]  Infrastructure investment (e.g. N2/N9 upgrades)[ ]  Oil & gas activity[ ]  Agro-processing sector[ ]  Green energy projects[ ]  Other (please specify): Click or tap here to enter text. |
|  | **Please estimate the current share (%) of your cargo handled through Mossel Bay** |
|  | [ ]  Less than 10%[ ]  10–25%[ ]  26–50%[ ]  51–75%[ ]  More than 75%[ ]  Not applicable |
|  | **Please estimate the share (%) of your cargo that can be handled through Mossel Bay in 5 years?** |
|  | [ ]  Less than 10%[ ]  10–25%[ ]  26–50%[ ]  51–75%[ ]  More than 75%[ ]  Not applicable |
|  | **How sensitive is your company’s routing choice to the following?** *(Rate 1 = Not sensitive, 5 = Very sensitive)* |
|  | Port charges: 1[ ]  2[ ]  3[ ]  4[ ]  5[ ] Transit time: 1[ ]  2[ ]  3[ ]  4[ ]  5[ ] Infrastructure quality: 1[ ]  2[ ]  3[ ]  4[ ]  5[ ] Customs efficiency: 1[ ]  2[ ]  3[ ]  4[ ]  5[ ] Connectivity to hinterland: 1[ ]  2[ ]  3[ ]  4[ ]  5[ ]  |
|  | **Do you anticipate any macroeconomic trends (local/international) affecting your shipping activity over the next 10 years?** |
|  | [ ]  Yes (please describe briefly): Click or tap here to enter text.[ ]  No |
|  | **For the Port of Mossel Bay, are there any limitations in draft, quay length, vessel size, or landside storage that constrain or may constrain your operations?** |
|  | Click or tap here to enter text. |
|  | **How do you assess the port's current pricing structure (tariffs, handling fees, marine charges)?** |
|  | Click or tap here to enter text. |
|  | **Do you have any recommendations for improving the implementation and stakeholder interface processes at PoMSB?** |
|  | Click or tap here to enter text. |
|  | **Do you face any constraints or bottlenecks that limit your current operations?** *(tick all that apply)* |
|  | [ ]  Limited dock space[ ]  Infrastructure condition[ ]  Skilled labour[ ]  Permitting/delays[ ]  Other (please specify): Click or tap here to enter text. |
|  | **How many full-time equivalent (FTE) jobs does your organisation currently support directly through activities in Mossel Bay?** |
|  | [ ]  0 to 5[ ]  6 to 20[ ]  21 to 50[ ]  more than 50[ ]  Prefer not to say |
|  | **How many new jobs would you expect to create in Mossel Bay if infrastructure and services at the port are improved?** |
|  | [ ]  1 to 5[ ]  6 to 20[ ]  21 to 50[ ]  more than 50[ ]  Too early to estimate |

# E. Additional Input

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| **Please provide any further input that may help us with the econometric modelling, identify additional opportunities or contact relevant stakeholders.** |
| 1.
 | **Are there specific months or seasons when you see a peak in your business?** |
|  | [ ]  Jan-Mar[ ]  Apr-Jun[ ]  Jul-Sep[ ]  Oct-Dec[ ]  No seasonal dependence |
|  | **Please comment on incurred costs for the transport and storage of goods?** |
|  | Click or tap here to enter text. |
|  | **How would a 10% increase in dockage or port fees affect your volume of business?** |
|  | [ ]  No change[ ]  Minor impact (<5% drop)[ ]  Moderate impact (5–15% drop)[ ]  Major impact (>15% drop) |
|  | **What proportion of your customers are:** |
|  | Based in Mossel Bay: Click or tap here to enter text.%Please elaborate: Click or tap here to enter text.From other parts of South Africa: Click or tap here to enter text. %Please elaborate: Click or tap here to enter text.From outside South Africa: Click or tap here to enter text. %Please elaborate: Click or tap here to enter text. |
|  | **Would the financial success of your project/s contribute to any of the following? Please explain?** |
|  | [ ]  Profitability of your business[ ]  Local community upliftment[ ]  National/regional economic growth[ ]  Job creation[ ]  Skills development or training[ ]  Other: Click or tap here to enter text. |
|  | **Which sectors or communities beyond your business would benefit from an increase of your shipping/logistic services in Mossel Bay?** |
|  | [ ]  Local SMMEs[ ]  Hospitality (accommodation, restaurants)[ ]  Other: Click or tap here to enter text. |
|  | **Are there international partners, financiers, or offtakers already linked to your project/s?**  |
|  | [ ]  YesIf 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 |
| 1.
 | **Are there institutional investors, DFIs, or OEMs you typically work with to scale your business?**  |
|  | Click or tap here to enter text. |
|  | **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