











# 1. Overview

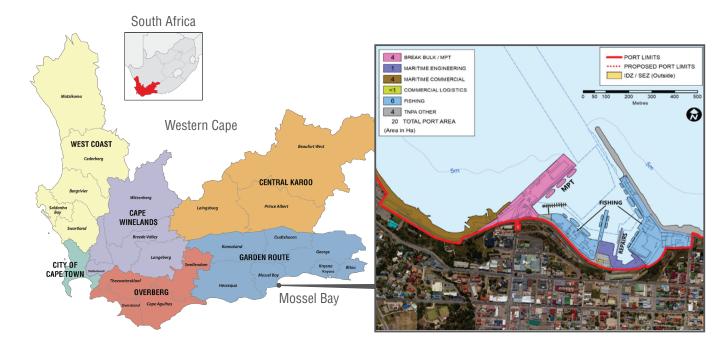
## 1.1 About the Port of Mossel Bay

The Port of Mossel Bay is one of eight commercial ports in South Africa, and one of four based in the Transnet Western Region. With a total asset base of approximately R1 billion and covering a land area of 25 hectares, it is the only South African port which operates two offshore mooring points within port limits. Currently, the port primarily handles limited cargo volumes with a focus on liquid bulk through the two offshore marine loading facilities. In addition, limited break-bulk cargo, mainly from fishing and offshore supply activities, is managed at Quay 4 which is one of the five quays. Key commodities handled through the port are petroleum products that are imported through the offshore moorings. It also serves as an offshore supply vessel base for one of its key clients, PetroSA.

The port is situated halfway between Cape Town and Gqeberha (approximately 400km east of Cape Town) and is accessible by road and railway networks. George Airport is located about 50km away. The port links the Garden Route, Central Karoo and parts of the Overberg to national and global markets. In turn, it serves as a connection point between consumer markets and the industrial zones of the Western Cape hinterlands. The port also plays a key role in supporting the local fishing sector by serving resident trawlers and housing fish processing plants.

Though relatively small, the port boasts a rich maritime history dating back to 1488. Today, there are four heritage sites within the port limits. These include Quay 1 and Quay 2, and sections of the breakwater wall and the old sea wall. With the port having been granted Port of Entry Status in November 2022, an increasing number of cruise ships have been calling on the port. This demonstrates its increasingly important role in growing the local tourism industry.

The town forms an integral part of the Garden Route, which is a major tourist attraction, and serves as one of the stops along the way to George and Knysna. Local and international tourists enjoy a vast array of activities both in and around the port as well as in the town of Mossel Bay. These range from water sports to museum visits and eating at a wide selection of restaurants. The port itself has a recreational area that offers amenities for restaurants, recreational fishing, and other boating activities.



Transnet National Ports Authority RFI, November 2024. TNPA/2024/05/0011/64658/RFI . Available here.

# 1.2 Port Capacity

Covering a land area of about 25 hectares, the port has eight berths and is the only South African port operating two offshore mooring points within the port limits. The port has three precincts which primarily focus on cargo handling, ship repairs as well as fishing and other recreational activities.<sup>2</sup> It mainly handles limited volumes of cargo with a particular focus on liquid bulk, usually taking the form of petroleum products. This is handled through the two offshore marine loading facilities: the Single Point Mooring ("SPM") and Conventional Buoy Mooring ("CBM"). The mooring buoys service the petroleum industry via subsea pipelines connected to tank farms situated about 13 km away on the mainland.

In addition, limited break-bulk and general cargo,<sup>3</sup> largely from fishing and offshore supply activities, are handled through Quay 4 which serves a multipurpose function. With a maximum draught of 6,5m, and the ability to accommodate vessels up to a maximum of 130m in length, it has a storage area of approximately 2040m<sup>2</sup> and can handle 86 000 tons annually. There are four other quays and a jetty which facilitate fishing activity. Maritime engineering activities and ship repairs centre on the Vincent Jetty Precinct,<sup>4</sup> where the port houses a slipway repair facility with a maximum capacity of 200 tonnes. Marine engineering firms that are available for all classes and types of on-board repairs are located here. These details are contained in Table 1.

Table 1.

Terminals	Quay 4 Multi-Purpose Terminal	Single Point Mooring (SPM)	Conventional Buoy Mooring (CBM)
Cargo Type	Multi-Purpose cargo	Import and export of petroleum	Petroleum export (not active)
Vessel Length	Max. 130m	200 m	200 m
Max. Draught	6.5 m	13 m	12 m
Vessel Reception capacity	5,000 Deadweight Tonnes (DWT)	50 000 Deadweight Tonnes (DWT)	42 000 Deadweight Tonnes (DWT)
Installed capacity	274 671 tons per annum	2 466 904 Kilolitres per annum	Currently inactive
Equipment	Mobile / Ship Gears	Cargo is loaded or discharged via sub-sea pipelines.	Cargo is loaded or discharged via sub-sea pipelines.
Storage area	Approx. 2040 m <sup>2</sup>	None available in the Port	None available in the Port

Area	Key Function		Draft (m)
Quay 1 Quay 2	<ul> <li>Mainly utilized for commercial fishing operations making this industry the largest port user by area.</li> <li>The quays are also used for ship handling and stevedoring.</li> </ul>	42 57	1.2 2.2
Quay 3 Quay 5		213 170	5 3.5
Vincent Jetty	- Serves as a berthing station for TNPA: Port of Mossel Bay Craft and accommodates fishing operations	2 × 143	3.5 - 5.5
Quay 4	<ul> <li>Multipurpose terminal.</li> <li>It has 4 hectares of storage area with a storage capacity of 2.9 tons per square metres.</li> <li>Accommodates a small craft mooring facility.</li> </ul>	265	6.5
Slipway facility	<ul> <li>The port also provides the only repair facility in the region with a holding capacity of up to 200 tones.</li> <li>The facilities are used to service fishing vessels, yachts and the port's fleet.</li> </ul>		N/A
Single Point Mooring (SPM)	- Services the petroleum industry via subsea pipelines connected to tank farms 13 km away on the mainland.		13
Conventional Buoy Mooring (CBM)			12

Transnet National Ports Authority RFI, November 2024. TNPA/2024/05/0011/64658/RFI. Available here.

Transnet National Ports Authority RFI, November 2024. TNPA/2024/05/0011/64658/RFI. Available here.

Transnet National Ports Authority RFI, November 2024. TNPA/2024/05/0011/64658/RFI. Available here.

## 2. Economic Contribution & Goods Traded

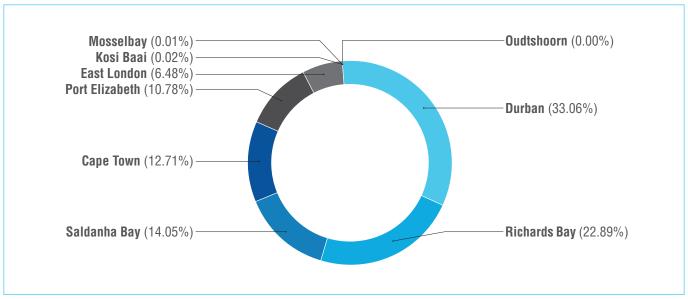
### 2.1 General

Mossel Bay is the second largest town in the Garden Route district in terms of economic contribution. The town accounted for about 17.5% of the district's gross value added (GVA) <sup>5</sup> in 2023. Mossel Bay's real GVA was R7.88 billion in that year, up by 0.82% compared to the previous year. The town's main economic sectors are finance, insurance, real estate and business services; trade, catering and accommodation; and manufacturing. These sectors accounted for 64.16% of GVA in 2023.

### 2.2 Economic Contribution

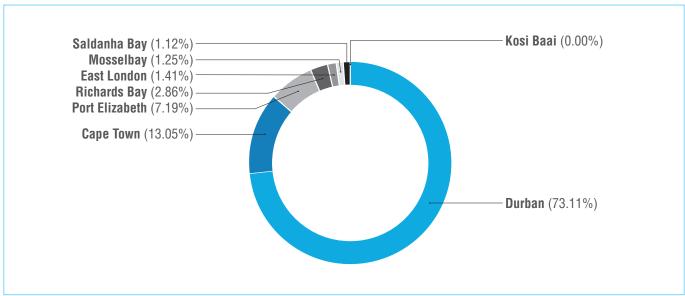
Ports play a significant role in South Africa's trade with the rest of the world. In 2023, seaborne freight accounted for approximately 56.54% of the value of the country's trade. Figures 1 and 2 show the percentage contribution of the various ports to South Africa's seaborne exports and imports in 2023. The Port of Mossel Bay accounted for 0.01% of total seaborne exports and 1.25% of total seaborne imports.

Figure 1: Share of South Africa's seaborne exports by port, 2023



Source: Quantec (2025)

Figure 2: Share of South Africa's seaborne imports by port, 2023



Source: Quantec (2025)

At constant 2015 prices

As shown in Figure 3, ports contribute towards a significant share of Mossel Bay's international trade. On average, approximately 75.43% of the town's trade with the rest of the world from 2014 to 2023 was seaborne. Specifically, maritime transport accounted for an average share of 61.54% of total exports and 81.49% of total imports during this period.

■ Airports ■ Land border ports Inland ports Sea ports 100% 90% 80% 70% 60% 50% 40% 30% 20% 10% 0% 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023

Figure 3: Share of Mossel Bay's trade by port, 2014-2023

Source: Quantec (2025)

# 2.3 Goods traded through the Port of Mossel Bay

The value of imports that pass through the Port of Mossel Bay far exceed the value of exports, as shown in Figure 4. In 2023, about R16.35 billion worth of goods were imported through the Port of Mossel Bay, representing an increase of 61.84% compared the previous year's value. Exports, on the other hand, were significantly lower at R131.79 million in 2023. On average, exports through the Port of Mossel Bay increased by 71.77% per annum between 2014 and 2023, while the average annual growth rate of imports was 15.46% over the same period.

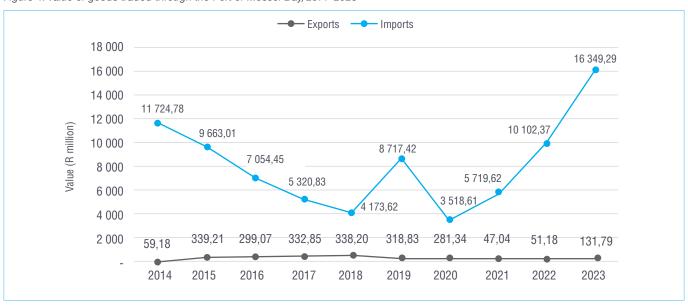


Figure 4: Value of goods traded through the Port of Mossel Bay, 2014–2023

Source: Quantec (2025)

Note: This is not just Mossel Bay's exports and imports but includes trade by other parts of the country

The top three exported products via the Port of Mossel Bay in 2023 were seeds, fruit and spores, of a kind used for sowing (with a share of 41.42%); tubes, pipes and hollow profiles, seamless, of iron or steel (33.21%); and other live plants, cuttings and slips (12.58%). This can be seen in Table 2. These three products accounted for more than four-fifths of total exports through this port. Only the product of petroleum oils obtained from bituminous minerals, other than crude, was imported via the Port of Mossel Bay in 2023. This is shown in Table 2.

Table 2: Top products traded through the Port of Mossel Bay, 2023

Exports	Imports				
Product	Value (Rm)	Share	Product	Value (Rm)	Share
Seeds, fruit and spores, of a kind used for sowing	54.58	41.42%	Petroleum oils and oils obtained from bituminous minerals, other than crude	16 349.29	100%
Tubes, pipes and hollow profiles, seamless, of iron or steel	43.76	33.21%			
Other live plants, cuttings and slips; mushroom spawn	16.58	12.58%			
Dried vegetables, whole, cut, sliced, broken or in powder	6.26	4.75%			
Vegetable saps and extracts; pectic substances, pectinates and pectates	6.06	4.60%			
Other tubes, pipes and hollow profiles, of iron or steel	2.40	1.82%			
Harvesting or threshing machinery; grass or hay mowers;	0.47	0.35%			
Direction finding compasses; other navigational instruments and appliances	0.17	0.13%			
Other live animals	0.17	0.13%			
Petroleum oils and oils obtained from bituminous minerals, other than crude	0.17	0.13%			

Source: Quantec (2025)

Note: This is not just Mossel Bay's exports and imports but include trade by other parts of the country

# 3. Port of Mossel Bay's planned future developments

The Port of Mossel Bay is expanding and developing its facilities by investing in a number of projects. This would increase port capacity while diversifying its value proposition to better serve existing clients as well as attract new business. By enhancing and expanding its business offerings, allowing it to become the premier port of the region, the port is positioning itself to serve as a hub and gateway to the Garden Route.

These investments would complement other efforts beyond the immediate vicinity of the port, thereby strengthening the link between the port, the town and the broader region.



Potential long-term view of the Port



Source: TNPA IDP REP Forum Garden Route District Municipality TNPA: Port of Mossel BAY Project Feedback

## 3.1 Performance enhancement & infrastructure investment

Transnet National Ports Authority (TNPA) is undertaking a number of strategic initiatives in pursuit of broader growth plans at the Port of Mossel Bay. Some of these efforts include the following:

- The rehabilitation of Quay 3 which entails undertaking sheet piling for safety due to ageing infrastructure.
- **Deepening and expanding Quay 4** to accommodate larger cruise and other break-bulk vessels. Part of this effort also entails developing the multipurpose terminal housed at the quay, while creating a new berth behind the quay with an extension of the breakwater. Plans are under way to develop a multi-purpose facility where multiple cargoes and related activities can be accommodated including storage. TNPA is also in the process of trying to acquire additional land in close proximity to the site, which would be used for back-of-port support for terminal operations. <sup>6</sup> This would require consultation with Transnet Freight Rail to allow for the provision of rail services.
- **Upgrading of water and electrical network** to support current and future operations.
- Installation of a deeper-water single point mooring to attract larger liquid bulk vessels.
- **Cruise reception facility** which entails developing a port of entry for passenger clearance.
- Slipway upgrade to enhance the facility and allow it to simultaneously accommodate a number of larger vessels while introducing a boat hoist for the local yacht and water-sports industry. A dedicated boat-building facility, to accommodate marine engineering activities, is also being considered. It is hoped that this would encourage growth in the maritime engineering sector, particularly through boat building and other forms of marine manufacturing. Currently, the slipway and associated infrastructure provide the only TNPA repair facilities in the region. It serves fishing vessels and yachts operating from the port, as well as TNPA vessels. The facility is an end-haul type where vessels are pulled out of the water on a cradle, bow first. The envisioned upgrades are now at execution stage, and would see an increase in capacity to 500 tonnes through the construction of two side-slips that would improve safety and efficiency by being able to accommodate up to four vessels simultaneously. With the business case having been approved, the port is currently in the procurement phase.
- **Provision of new single point mooring system** in deeper waters to accommodate larger vessels whilst increasing the liquid bulk volumes of the port.
- Commercial and other recreational developments are being considered to grow and diversify the investment portfolio of
  the port. Many of these would still focus on promoting maritime commercial activities with new lease rentals and facilities
  to accommodate recreational maritime and other related activities.

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## 3.2 Sustainability Efforts

The vision of the port is to become a multi-dynamic economic enabler for sustainable energy and maritime commercial logistics for the Southern Cape.<sup>7</sup>

In 2022, TNPA conducted an energy audit which indicated a need to stabilise energy costs and availability in the future, while reducing greenhouse gas and other emissions related to electricity generation.<sup>8</sup> TNPA is also constantly seeking to limit its contribution toward global warming as part of its corporate environmental responsibility. This requires a shift from coal-based energy production along with enhanced industry participation in local renewable energy as part of its industrial development objectives, especially as renewable energy costs continue to decline.

In response to the findings of the energy audit, TNPA intended to launch a Renewable Energy Power Purchase Programme that would procure generation capacity from renewable energy power generation facilities with short lead times across the ports system.<sup>9</sup> The integration of renewable energy into the port system would allow TNPA the opportunity to respond positively to change whilst supporting the establishment and strengthening of local renewable energy industries as part of TNPA's industrial development objectives. The Port of Mossel Bay is one of eight commercial ports that are included in this project.<sup>10</sup>

# 3.3 Digital Focus

The Port of Mossel Bay is set to undergo a comprehensive upgrade of its water and electrical reticulation network, which includes the installation of smart metering systems throughout the facility and the replacement of outdated mini substations. This initiative is part of the port's efforts to enhance efficiency, reduce costs, and modernise its electrical and water infrastructure with smart technology. The goal is to improve operational performance, minimise human error, and achieve greater cost savings. Completion date for the entire upgrade is estimated to be November 2027.

## 4. Cruise Terminal

An increasing number of cruise ships have been calling on the port of Mossel Bay. In 2022, the port welcomed 15 vessels and the number increased to 20 during the 2023 season. During the latest cruise season, this jumped to 22 with over 16 000 passengers disembarking and visiting Mossel Bay. However given the size of cruise ships in relation to the port facilities, the cruise vessels usually anchor in the bay while passengers are ferried to shore.

In November 2022, after the port was granted Port of Entry Status in terms of immigration legislation, there has been a marked increase in the number of cruise ships calling on the port. This demonstrates the increasingly important role it can play in growing the local tourism industry. To cater for this increase in demand, a new dedicated cruise reception facility is being developed that would serve as an entry point for the clearance of passengers by all the necessary stakeholders. It is due for completion during the first quarter of 2025 and would allow the port to accommodate larger volumes of cruise passengers.





Source: TNPA IDP REP Forum Garden Route District Municipality TNPA: Port of Mossel Bay Project Feedback

Transnet National Ports Authority, November 2023. IDP REP Forum Garden Route District Municipality TNPA: Port of Mossel Bay Project Feedback.

Available here.

<sup>8</sup> Transnet National Ports Authority RFI, July 2022. TNPA/2022/07/0731/8105/RFI. Available here.

<sup>9</sup> Transnet National Ports Authority RFI, July 2022. TNPA/2022/07/0731/8105/RFI. Available here.

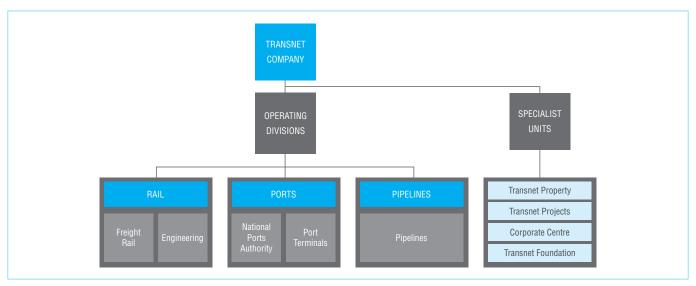
<sup>10</sup> Maritime Gateway, 2022. Privat participation invited in South African Ports for green energy projects. Available here.

# 5. Port Authority and the Regulation of Ports

# 5.1 Transnet National Port Authority

As illustrated in Figure 5, Transnet SOC Ltd (Transnet Group) is the backbone of South Africa's freight logistics chain, serving as the operator, owner and custodian of much of South Africa's railway, pipelines and ports infrastructure.<sup>11</sup> TNPA and Transnet Port Terminals (TPT) are two of five operating divisions of Transnet Group. They serve as the two primary entities in respect of the ports and operate within a legislative and regulatory environment created by the National Port Act, No 12 of 2005 which is discussed later. These two entities were established in 2000 when Portnet, then Transnet's single port division, was divided into operations and landlord businesses.<sup>12</sup> These were SAPO (now TPT) and TNPA respectively.

Figure 5.



Source: Transnet National Ports Authority: Port of Cape Town - Africa's Premium Fresh Produce Port

Whereas TPT serves as a terminal operator for almost all the container terminals in the country, TNPA owns, operates and controls the South African commercial port system which consists of the country's eight commercial ports. They also cover a ninth port, at Port Nolloth in the Northern Cape, which does not handle any commercial cargo. TNPA serves as the custodian of these ports on behalf of the state. As the port landlord, its role includes the management of the port system as well as the provision of port infrastructure, land use control and various marine services. Beyond this, they are responsible for the safe, effective and efficient economic functionality of the national port system. Overall, this entails the role of being the master planner for the development of the port and its infrastructure.

## 5.2 National Ports Act of 2005

The 1996 White Paper on the National Transport Policy looked to overhaul the approach to transport regulation, and outlined a vision and policy framework for the maritime transport sector. <sup>16</sup> This was further developed through the 2002 National Commercial Ports Policy <sup>17</sup> that outlined a vision for a globally competitive, secure, and safe commercial ports system operating at internationally accepted levels of efficiency to support South Africa's economic growth aspirations. <sup>18</sup> By outlining the role of ports in the country's economy, it reflected government's policy stance on commercial ports. This policy thinking has been given effect through the National Ports Act of 2005 (Ports Act) which serves as the primary piece of legislation regulating the country's commercial port sector in terms of development and operations. <sup>19</sup>

<sup>11</sup> Transnet National Ports Authority. Investor Relations Information Statement Execution. <u>Available here.</u>

<sup>12</sup> Transnet Port Terminals. Our History. <u>Available here</u>.

<sup>13</sup> Transnet National Ports Authority. Divisions Pages. Available here.

<sup>14</sup> Transnet National Ports Authority. Port of Cape Town" Africa's Premium Fresh Produce Port. Available here.

<sup>15</sup> Transnet, 2017. Investor Relations Integrated Report. <u>Available here.</u>

Trade and Industrial Policy Strategies, 2014. Review of regulation in the Ports Sector. University of Johannesburg: Centre for Competition, Regulation, and Economic Development. Available here.

<sup>17</sup> Bowmans, 2018. Ports & Terminals. Available here.

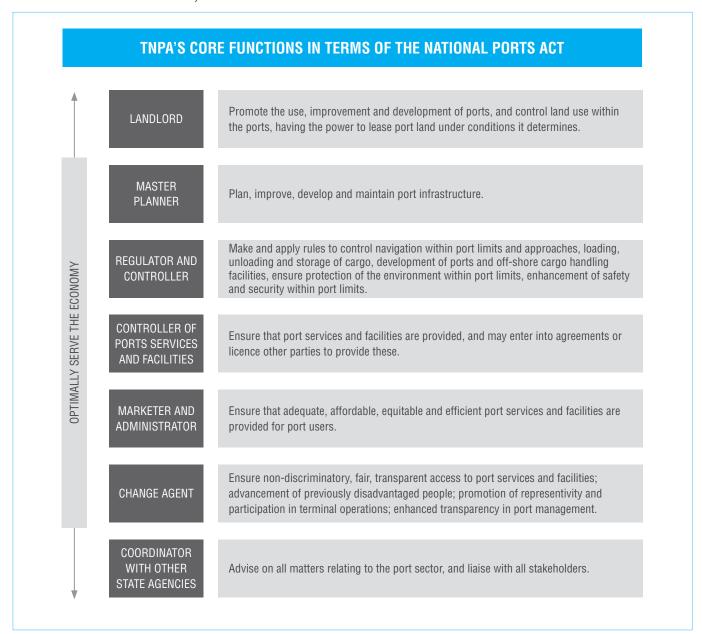
Draft 7: Roadmap for the Freight Logistics System in South Africa. Available here.

<sup>19</sup> Transnet National Ports Authority. Port Legal Framework. Available here.

With a focus on modernisation and ensuring efficient operations of South Africa's commercial ports, the adoption of the Ports Act marked the first step at creating a comprehensive institutional, operational and regulatory framework for ports. It creates the legislative and regulatory environment governing ports and related entities. As a landlord port authority, TNPA is entrusted with ensuring the efficient and effective economic functioning of the national ports system which it manages and controls on behalf of the State.<sup>20</sup> The core functions of TNPA (seen in Table 4) are outlined in Section 11 of the Ports Act. It also makes provision for the development of Port Regulations and Port Rules through Section 80(1) and Section 80(2) which deal with the control and management of the ports respectively.21

While entrenching TNPA as the landlord port authority, the Ports Act also facilitates private sector participation by allowing TNPA to enter into agreements regarding the financing, construction or operation of port terminals and facilities.<sup>22</sup> The regulatory environment of TNPA and ports in South Africa remains complex with various pieces of legislation evolving over time.<sup>23</sup> In response to this, TNPA has developed mechanisms such as the introduction of a regulatory universe as well as compliance monitoring plans to ensure that compliance risks are effectively managed and that all regulatory requirements are met.<sup>24</sup>

Table 4: Functions of the Ports Authority



Source: Transnet National Ports Authority: Port of Mossel Bay - Serving the Tourism, Oil and Fishing Industries<sup>25</sup>

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<sup>20</sup> Juta, 2006. South African Ports Law Handbook. Available here. 21

Transnet National Ports Authority. Port Legal Framework. Available here.

<sup>22</sup> Juta, 2006. South African Ports Law Handbook. Available here.

Transnet National Ports Authority. Investor Relations Report. Available here.

Transnet National Ports Authority, 2024. Report. Available here. 24

Transnet National Ports Authority, 2024. Brochure. Available here.

## 5.3 Ports Regulator of South Africa

With the implementation of the Ports Act, came the creation of the Ports Regulator of South Africa (the Ports Regulator). Constituted in 2006, it was introduced as an independent regulator of the ports; specifically TNPA.<sup>26</sup> In terms of the Ports Act, the Ports Regulator is responsible for:

- monitoring the activities of TNPA
- economic regulation of the ports, including approving TNPA's tariffs annually
- determining complaints against TNPA by port users and hearing appeals by port users against decisions of TNPA
- fostering competition within the ports

TNPA submits tariff proposals to the Ports Regulator annually. The Ports Regulator, in turn, takes the proposed tariffs through a public consultation process where it explains the methodology used in determining the tariffs. The tariffs are collected through the agents of ships, acting on behalf of shipping lines and cargo interests at the ports, who pay for marine services and cargo dues. Tariffs which are due by the leaseholders at the port are collected in the form of rentals. In addition, the Ports Regulator has a number of ancillary functions pertaining to regulating competition within the ports as well as providing affordable, adequate and efficient services and facilities. Most of these activities are carried out through its regulation of TNPA. The Ports Regulator has no jurisdiction over TPT, which controls many key container and automotive terminals across TNPA ports.

# 5.4 Economic Regulator of Transport Act

Price regulation in South Africa's transport sector has been fragmented historically with separate regulations for ports, rail, airports, and roads.<sup>27</sup> However, in June 2024 the Economic Regulation of Transport Act (the Act) was promulgated into law with the objective of establishing a single Transport Economic Regulator (TER).<sup>28</sup> It is envisioned that the TER would subsume the PRSA along with others.<sup>29</sup> The main aim behind the Act in consolidating multiple frameworks under the TER, making it the sole price-regulating authority across the transport sector, is to combat inefficiencies and prevent monopolistic pricing through regulated transport entities. This centralisation is aimed at tackling limited competition and protecting consumers from potential exploitation through unfair pricing practices. The TER would have the authority to set price controls, monitor tariffs, and ensure transparency and justification of pricing.<sup>30</sup>

Beyond price regulation, the Act provides for a number of consumer protection mechanisms including ensuring fair and non-discriminatory access to transport facilities or services. It is envisioned that it would operate similarly to the National Energy Regulator of South Africa, and would approve the price tariffs of regulated entities like Transnet.<sup>31</sup> The TER also accounts for the resolution of complaints that are levied against regulated entities in respect of unreasonable refusal of operating licenses, not meeting certain service standards linked to a price control, as well as other forms of anticompetitive conduct.<sup>32</sup> The TER is mandated to consult with industry players as well as the public, before the approval of price tariffs.<sup>33</sup> Existing sector price regulations, as well as any new regulations, would remain in force until the TER publishes a new price control. Any decisions made by the TER could be appealed to, or reviewed by, a newly established Transport Economic Council. As at February 2025, both of these institutions still need to be set up.

Bowmans, 2018. Ports & Terminals. Available here.

Norton Rose Fulbright, 2024. Economic Regulation of Transport Act 6 of 2024: A new era for South Africa's transport sector. Available here.

<sup>28</sup> Bowmans, 2024. South Africa: Single Transport Economic Regulator. Available here.

Bowmans, 2019. Guide SA Ports Review. Available here.

Norton Rose Fulbright, 2024. Economic Regulation of Transport Act 6 of 2024: A new era for South Africa's transport sector. Available here.

<sup>31</sup> Cliffe Dekker Hoffmeyr, 2024. The Promulgation of the Economic Regulation of Transport Act is a marked step towards rail reform and privatisation.

Available here.

Norton Rose Fulbright, 2024. Economic Regulation of Transport Act 6 of 2024: A new era for South Africa's transport sector. Available here.

Cliffe Dekker Hoffmeyr, 2024. The Promulgation of the Economic Regulation of Transport Act is a marked step towards rail reform and privatisation.

Available here.

# 6. About Wesgro

Wesgro is the official Tourism, Trade and Investment Promotion Agency for Cape Town and Western Cape. Actively positioning the province as a region of unlimited opportunity, the agency is the first point of contact for foreign buyers, local exporters, investors and those in the leisure and business tourism industry wishing to take advantage of the unlimited business potential in the region.

We attract and facilitate both national and international investment, and work to grow the export of products and services from the region. The agency markets the Western Cape as a competitive film, business and travel destination. Wesgro strives to provide clients with the information needed about the region to make informed business decisions.

# 7. Contact Details

If you are interested in finding out about exporting from the Western Cape, please feel free to reach out to us through the <u>Cape Trade</u> <u>Portal</u>. If you have questions about the logistics or the ports in the Western Cape, please contact:

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