

BRICS MARITIME TRADE FORUM REPORT

24 March 2013 Hilton Hotel Durban-South Africa



transport

Department:
Transport
REPUBLIC OF SOUTH AFRICA



Organized and Convened by:

STRATEGY, INVESTMENT & CONSULTING IN AFRICA
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PURPOSES AND OBJECTIVES OF THE FORUM

To develop a consensus on South Africa's approach to BRICS maritime trade and investment development opportunities and to engage experts on pertinent issues for exploration with the BRICS partners on developing maritime transportation systems.

SPEAKERS

Introduction and opening: Mr. Riad Khan (CEO: National Ports Regulator)

Keynote introduction: Dr Maria du Toit (Acting Director General: Department of Transport)

Keynote address: Mr. Ben Martins (South African Minister of Transport)

BRICS – A Maritime Trade Development and Investment Partnership for Growth: Commander Tsietsi Mokhele (CEO: SAMSA)

Panel moderator: Mr. Paolo Gomes (Constelor Holdings)



PANEL 1

Leveraging on the BRICS Partnership for developing South Africa's maritime trade and attracting investment into the maritime industry.

Challenges facing the industry especially as it relates to growing, developing and transforming the patterns of current unbeneficial structure and nature of South Africa's maritime trade.

Opportunities for developing and transforming the current maritime trade malaise, and enabling investment in the South Africa's Maritime shipping industry.

Panellists:

Mr. Riad Khan (National Ports Regulator)

Mr. Tsietsi Mokhele (CEO: SAMSA)

Mr. Tau Morwe (CEO: TNPA)

Mr. Napo Ramodibedi (Maritime Lawyer and industry player)

Mr. Thami Gqcaba (MD: Them bani Shipping)

Mr. Lance Manala (Amistad Group of Companies)



PANEL 2

Exploring major opportunities for addressing South Africa and Africa's Maritime Sector capacity constraints and how these could be engaged on with the BRICS partners.

- Major challenges facing the sector and opportunities for addressing these challenges.
- Opportunities for investment in capacity development within the context of BRICS.

Panellists:

Mr. Andrew Millard (CEO of Via Capital)

Dr. Michele Ruiters (Development Bank of Southern Africa)

Prof Patrick Vrancken (NMMU Professor)

Dr. Brian Gowans (Principal Engineer - Marine Technology)

Mr. Prasheen Maharaj (SA Shipyards)

Mr. Ebrima Faal (Senior Economist - African Development Bank)



OBJECTIVES OF SOUTH AFRICA'S MARITIME SECTOR VIS-A-VIS BRICS

South Africa did not join BRICS as a favour, it was because the BRIC nations identified strengths that South Africa would contribute to the BRICS bloc, through the linkages and relationships that it already had with the BRIC members. The BRIC partners recognised that they could not elevate their game to the level that they wished to without South Africa joining.

Our engagement must, therefore, not be an engagement of people seeking acceptance, but rather on the basis that we have things we can offer and things that we can need.

We must use the BRICS summit to chart a way forward that bears this in mind and defines three very important things:

- How South Africa can benefit from our membership of BRICS
- What South Africa can contribute to BRICS
- How to maximise the benefit to the region of South Africa's membership of BRICS.

If there is no advantage to South Africans, or to the region, or to BRICS, the relationship will be weak and the bloc's potential will be limited. We need to put things into place that make sure that we give to BRICS what it needs, that BRICS gives to us what we need, and that we give our partners in Africa what they need. Being part of BRICS brings rewards, but also brings with it the underlying challenges of competition, as each member state wishes to derive maximum benefit for their own countries. It is therefore essential to develop synergies and symbiotic relationships with other African countries in order to derive maximum benefit from relationship with BRICS, and to find areas of mutual benefit with our BRICS counterparts.

We need to develop a clear agenda that provides clarity on the role that the maritime sector will play in making BRICS a success, but also the role that BRICS can play in ensuring that the South African maritime sector is successful. Through targeting our engagement with BRICS, we will be able to take full advantage of the opportunity granted by the Minister of Transport in casting a spotlight on the sector through naming 2013 the Year of Maritime.

THE IMPORTANCE OF SOUTH AFRICA'S MARITIME SECTOR AND OF LEVERAGING THE BRICS OPPORTUNITY

The theme of the BRICS conference is BRICS Africa: Partnership for integration, development and industrialisation. The challenge is to start unpacking what we understand by these terms and to engage the Department of Transport and other sister departments in the economics cluster regarding the implication of this focus, and how best to work to develop the maritime industry for the benefit of the citizens of South Africa but also other African countries.

Besides South Africa's mineral resources, and financial resources, our location and the strength of our maritime industry is one of the key areas of strength in our engagement with BRICS. All BRICS trade is seaborne trade. South Africa has strong maritime infrastructure, and is strong on the

basis of being geo-economically and geo-strategically located on one of the major traffic routes in the world, as the halfway point between East and West in the BRICS bloc. In addition, South Africa has a strong relationship with China, to whom we export. We should be looking at how to take advantage of this and how to leverage this strength in our partnership with BRICS, and realise that our capacity to manage the export of manufactured goods makes us a strong partner in maritime trade.

Of all the BRICS member states, South Africa has the largest level of exports to Africa itself. Our manufactured goods move 27% of total intra-African trade. Africa is an island continent, with 70% of all African countries being coastal, and 90% of all products that Africa trades with others going via the oceans. This requires seaborne platforms, maritime corridors running inland, ports of entry across the continent. South Africa is already a maritime gateway not only around Africa but into Africa, and acts not only as a halfway point around Africa, but as a hub for the maritime trade to, across and around the continent.



From a South African perspective, we need to be clear about our motivation for developing the maritime industry



South Africa is undisputedly a maritime country. Total imports and exports contribute 60% of South Africa's GDP, and 98% of international bound trade is carried by over 12,000 deep sea trading vessels through our waters per annum, around South Africa's coastline which is one of the longest in the world. While previously we only dealt with tanker business, there are now between 13,000 and 15,000 TEO container vessels routing around the Cape per annum.

That said, South Africa has a disproportionately small maritime industry and small influence, and the industry is at a nascent level. In the past, it has been a Cinderella industry: somewhere in the background, not fully utilised to the benefit of role players or South Africa in general. We have conceded much of our maritime space to foreign players, particularly European ship owners. This dynamic is common amongst the BRICS nations, and has been a dominant dynamic since WWII when America conceded ownership to European ship owners, who have developed on a model of relative cheapness, concessions. This is, however, changing. The model of European ownership has been turned on its head in the last 10 years and the industrialising countries of BRICS have started, both independently and as a trading bloc, to increase their participation.

As a part of this wave, there is great potential to develop South Africa's maritime industry, and it is for this reason that 2013 has been declared the Year of Maritime by the South African Department of Transport. The aim of casting this focus on the industry is to seek ways and measures to foreground this industry in the general public mind, but also to work closer with our neighbouring countries and BRICS countries to develop South Africa and Africa's maritime sector.

BRICS volumes of trade have increased, in some instances up to 32% per annum, but this has had a limited impact on our ability to grow economies and create wealth for our people. The maritime industry can drive the must-needed growth in the region. Maritime defines the level to which we can push ourselves in seeking to become developed and become a developed economy; we are not going to become a developed country on the basis of domestic consumption. The only chance of growth is to produce and to sell to others and receive goods that are coming to our country.

The input and involvement of key stakeholder groups will be essential in driving the industrialisation and development of the maritime sector and of clarifying the BRICS maritime agenda and terms of engagement through a clear articulation of the issues and frank, open, constructive and robust engagement around the challenges.

Most importantly, from a South African perspective, we need to be clear about our motivation for developing the maritime industry: whether it is chiefly social or economic, or a combination of the two. Such clarity of purpose and of vision will enable the development of targeted initiatives to develop South Africa's maritime industry for the benefit of her citizens, of her African neighbours, and of her BRICS counterparts.

KEY SOUTH AFRICAN MARITIME DEVELOPMENT PRIORITIES

The maritime priorities on which we must engage with BRICS to put ourselves on a path of maritime development for increased trade and better growth of our economy, both as elaborated by Commander Tsietsi Mokhele and in the moderated panel discussion, are outlined below:

Regional integration:

South Africa is a hub for the continent in moving the BRICS agenda, and central to South Africa's role in BRICS is the facilitation of the integration of African economies (South Africa, SADC, and beyond) with the BRICS economies. Regional integration is essential in order for South Africa to play this role; while this is happening not only on a regulatory and legislative front, but is additionally being driven by commercial regional players, there are still many impediments to regional integration that hamper South Africa's ability to act as a hub for Africa and in particular to drive the continental maritime agenda within BRICS.

You can never talk about integrating Africa while ignoring the fact that stares you in the face – that 70% of African countries have coastlines, are linked by the oceans, and require shipping. We need to embrace maritime integration in acknowledgement that shipping is natural and integral to logistics systems in Africa. Within this context, there are considerable opportunities for maritime integration and development:

- Large land-locked countries like Nigeria need to build corridors
- Small coastal countries lack the capacity to develop their own maritime sectors
- West Africa cluster has 45% of the world's bauxite deposits; Zambia, DRC and Angola have huge copper reserves. The international market will continue to consume these resources, and our own

industries will also need these for their own growth, implying the need for strong pan African shipping capabilities.

There are, however, myriad integration challenges that need to be addressed in order to facilitate BRICS and other countries' players' investment in and trade with Africa: issue of access, alignment and cooperation across the continent act as disincentives for foreign customers or investors, and if we do not improve on these issues – either within the context of BRICS or more generally – we will not be able to achieve the levels of development and growth that we envision.

There are many steps that need to be taken to strengthen regional integration in general, and integration of Africa's maritime resources in particular. Specific steps mentioned included:

Expediting and supporting existing integration initiatives and organisations

Increasing domestic participation: There should be a commitment at the African Union level that mineral, food and other products that are transported between African countries should be done so on African ships, as well as an endeavour to cultivate the African maritime industry to support the economic development.

Policy framework:

While the maritime policy framework needs to be clear in terms of the priorities that are identified and addressed in the area of maritime development, the challenge is not in



the policy itself. The policy is a function of the level of awareness of how this sector links to the goals of the country, region and continent. If you don't have policy awareness you are likely to end with a policy position that undermines your goals. Throughout Africa, maritime is seldom acknowledged as an engine of growth, and is seldom prioritised from a policy perspective. While economic growth will always be based on how we trade with other countries, transport – and maritime in particular - has not always been included in discussions on e.g. mining and agriculture. While 70% of the value in the trade of such commodities often lies in the logistics, this is often overlooked, and the benefit placed in the hands of others.

Currently, the regulatory system is hampering the development of the sector, and targeted amendments need to be taken into consideration in driving change in the sector. At a country level, we must therefore have on the table a strategy that ties into what it is that we wish to achieve in the maritime industry. For example, the Philippines' maritime strategy focuses on providing seafarers and developing employment in the industry. South Africa needs to identify its strategic development imperatives for the maritime sector and to develop policy in accordance with this.

Laws and regulations are not static. Policy makers from the relevant departments need to revisit whether the existing policies are still fit for purpose, to identify and address unintended consequences of prior legislation and policies, and to incorporate the views and opinions of industry practitioners. Particular policy issues that need to be addressed in South Africa and that can be raised in the consultative policy revision process which is underway include:

Free On Board policy: When the commodity is sold, it is sold Free On Board, i.e. the purchaser nominates the shipping vessels. For example, if we are selling iron ore to China, then the Chinese buyer will nominate that a Chinese ship fetches and carries it from Saldanha, leading to lost opportunity for South Africa, as it ceases to be our cargo at the point of loading. This is an area that is currently under discussion with government as there is potential for this to change. The Departments of Transport, Mineral Resources and Energy need to be involved in this discussion.

CIF import policy: We do not want imported goods shipped on an FOB basis, we want things imported on a CIF (Cost, insurance and freight) basis, because this way the importing entity, ourselves, gets to nominate the shipper.

Amendment of the National Commercial Ports policy: Potential amendments would include prescribing that a specific percentage of all goods leaving South Africa need to be carried on South African ships, as well as to include cabotage rules and guidelines. In addition, port pricing needs to be restructured, as port pricing structures are more supportive of the industry as it was during apartheid, not for the current industry.

Alignment of maritime policy with mining policy in particular: Creation of a linkage between the transport of imports and exports and licensing regime of mining houses is one amongst many opportunities for alignment that will allow for the enhancement of South Africa's maritime industry's potential to benefit from the trade in minerals with the other BRICS countries.

Development of bilateral trade agreements with maritime trade partners: We need to talk to trade partners and engage on these aspects. For example, we need to approach the purchasers of South African cargo to say we have our own policy prerogatives in South Africa, and are trying to develop a shipping industry, so we need to negotiate what % FOB and what % CIF we will include in contracts moving forward. The UNCTAD law of 2040 should guide our approach to BRICS to enable our entry into this space, relooking at handling of goods on both ends of the ocean, and addressing the ship ownership, shipping services, and ship operations barriers that prevent our participation.

Vessel ownership and logistics:

The maritime sector in South Africa in particular and Africa in general, is not achieving its potential for returns and profit generation, or employment creation; one of the main reasons for this is the lack of domestic vessel ownership. We need to address the vessels themselves, and the inland logistics. We lose a lot of money to foreign operators through failing to invest in vessel ownership and cheap operations. While all of the other elements are there, the management of seaborne trade itself, and transportation and logistics linked to this are not in place: Brazil has fleet of 172 vehicles, Russia has almost 2,000, India has over 500, China has about 3000, but South Africa has not caught up in terms of participation.

In the past, South Africa's Safmarine was sustainable for 50 years until its sale in 1997; this state-owned company was able to provide jobs offshore, as well as in the support structure and services industries.

A few options exist now for South Africa in terms of vessel ownership:



Develop a South African or pan African private ship owning company: There is potential for such an entity to be competitive, as the historical example of Safmarine has shown. Such private fleet could potentially be developed as a PPP. There are, however, impediments for local operators who invest in feasibility studies and look to invest in this area, and these need to be identified and addressed.

Operating and managing foreign ships: While China has about 3,000 vessels under its control, not all are owned by China. A potential path for South Africa would be to follow this model and to investigate how best to cooperate with our BRICS partners, and have a pooling arrangement, where we operate and manage their vessels while we are building capacity.

Government-owned fleet development: Other BRICS countries' governments own vessels; South Africa's doesn't. While Transnet has not thought of owning vessels, it has visited its Indian counterpart who does. The Ethiopian government similarly has a national fleet. While the government of South Africa could own vessels and start a national shipping line,



Develop a South African or pan African private ship owning company

this decision would need to be made in line with the country's maritime strategy which, in turn, would be made in line with national development objectives.

In general, we need to ensure that we take a greater role in transporting our goods and services to our BRICS counterparts and to other markets, as well as in importing goods into our countries. If we want to swim with the sharks, we need to have our own vessels: we need to identify what we can do quickly, and address these low-hanging fruits in order to develop and grow the maritime sector. We are a major regional player, with major obligations that will become a drain unless we invest and place effort in the correct place. Transnet has invested R300bn in, amongst others, ports, and we need to embrace maritime transformation in terms of vessel ownership to position us to ensure that we maximise the returns on this investment.

Ease of doing business:

We need to change a range of things in order for the industry to develop; nothing is immediate or isolated. The economic opportunity in the maritime industry is difficult because of the particular market structure that exists in the environment, as well as the particular historical structure. While South Africa is highly regarded, we make it hard for potential international partners to enter into this market; partners' goodwill dissipates when they interact with the local labour legislation and other constraints and challenges that they are not used to having

to deal with in their own countries, and do not have to deal with other potential partners.

In addition, there are challenges in doing business with Africa outside of South Africa. In addition to the integration issues mentioned above, there are efficiency issues, as well as safety and security issues that prevent our BRICS counterparts and other investors and trade partners from participating in Africa.

Key steps to address these ease of doing business issues include, amongst others:

- *Ongoing regional integration initiatives.*
- *Revisiting local labour and other legislation:* While South Africa's labour legislation is developed in conjunction with organised labour, the ILO, SADC and other stakeholders, many of our BRICS counterparts and other international players find our labour legislation to be a constraint. Consideration should be given to examining current labour legislation in the light of cooperation with, and competition with, our BRICS counterparts.

Financing:

There is lack of a dedicated funding scheme for maritime initiatives, and a lack of appropriately priced capital available for maritime projects. As an entrepreneur, when you approach institutions for assistance, there is little financial support that can be extended. In addition, there is a lack of alignment between

We must move fast on the financing of projects, to allow us to stay ahead of the curve, so that we can meet with the productive capacity of the country. In order to begin to address the lack of financing for maritime initiatives, the following steps are possible:

- *The development of a dedicated maritime finance scheme: This could potential fall under the auspices of the BRICS development bank, and would provide financing for both maritime infrastructure and other maritime projects. This could extend to offshore investments.*
- *Leverage BRICS counterparts to obtain cheaper financing with better terms*
- *Tie in available financing with continental developmental priorities*
- *Access financing through DBSA in partnership with other BRICS countries' banks.*



stakeholders, and a disconnect between the objectives of public players, and private players in the industry, as well as between personal agendas and the national agenda.

Industrialisation with respect to shipbuilding and ship repair capabilities:

In the 1960's South Africa and South Korea were comparable in terms of economic development; the same cannot be said now. Manufacturing is about good policies and skilled people. A recent audit of fishing boats in South Africa indicated that over 800 of the existing 2,000 need to be immediately recapitalised as they are no longer fit for purpose. At the current rate of building – 20 boats p/a – it would take 40 years to recapitalise this fleet; this is what is required to provide seaborne capacity for exporting manufactured goods, amongst other uses. If we were to double our manufacturing capacity, it would take 20 years; increasing it fivefold would reduce this to 8 years. This gives an indication of the potential impact of industrialisation not only on the maritime industry itself, but on dependent manufacturing and other industries.

The South African marine manufacturing industry includes all business involved in the designing, manufacturing, constructing, repairing and or maintenance of vehicles and or components thereof., as well as the management of shipyards, dry docks, marine repair shops and similar enterprises. The industry is very much a part of South Africa's proud maritime industry. That said, however, the industry is in decline: 50% of our boat builders have closed down between 2009 -2013; there has been little investment in the modernisation of our ship yards since the 1980s; there been a steady decline in ship yards: the dry docks and floating docks are in a state of disrepair, and urgently need maintenance and upgrade; there has been no private sector

investment into floating or dry docks and none are being envisioned or allowed; shipyard rentals are exorbitant compared with international benchmarks; most government programs have been placed with foreign companies in spite of local capacity.

So while we have a long-proven ability to design and maintain quality vehicles, when we invite BRICS to do business with us, there is currently very little incentive for our BRICS partners to use us, as South Africa, as there is no existing industrial base that they can leverage into the rest of Africa. So we must be careful not to embarrass ourselves, but must invite them into a collaborate framework for mutual benefit. We can, and will, compete successfully in the areas that we choose, provided that we:

- *Expedite the implementation of South African projects:* there is about R10-R12bn worth of shipbuilding projects over the next 3 years that we need to take advantage of.
- *Capitalise on existing bilateral commissions and platforms:* South Africa has many bilateral agreements that we can leverage to develop agreements aimed at developing our local capacity.
- *Leverage our niche capabilities in high value added high technology craft:* We are currently successfully building these, and should develop this niche. We need to move into new markets, away from our past niche expertise in e.g. yacht building.
- *Develop local partnership recommendations:* Research approaches to encouraging local participation without affecting the efficiency of operations.

Public Private Partnerships:

Developing the South African maritime industry so that it meets commercial and social needs, ensuring that the necessary policies and platforms are in place to maximise the potential of the industry to act as an agent of transformation, will require dedicated public private partnerships. Specific needs with respect to PPP creation that were identified included:

- *Strengthen the PPP framework:* Develop a common industry vision, and develop strong PPPs to identify and invest in low hanging fruit opportunities.
- *Market South African capabilities globally:* One area in particular in which the South African government can support is in the promotion of South African skills.
- *Port development:* There needs to be Public-Private partnership to allow for the development of ports. There are many opportunities for private companies to collaborate with public players in port development: the North-South corridor includes many port and rail project opportunities, and in South Africa, R300bn has been invested in infrastructure development, much of which is in port development.
- *Planning and policy development:* The Department of Transport's master plan for 2030 must be concluded in order to allow for the packaging of projects that support maritime trade, in turn allowing for increased efficiency and capacitating of our ports and maritime corridors.

Skills development and training:

South Africa's maritime industry alone has the potential to provide 400,000 jobs: 45,000 – 50,000 seafarers alone could be employed. The production capacity and supply-side are currently, however, not sufficient to support this. By way of comparison, India has 78,000 seafarers at sea,

and China has 650,000 participants, compared with South Africa's 2,000.

We are still in the development period of this industry, not in the harvesting period. In order to grow and develop, South Africa's maritime industry needs to make considerable investment in human capacity development, i.e. the cultivation of skills and development of capabilities, including the following possible steps:

Develop a maritime training institute: There is a gap in educating a leader group. Many new entrants into the industry hit a glass ceiling as they lack project management, financial management and other management skills, and training and skills development programs aimed at cultivating these and other necessary leadership skills are required. Some tertiary institutions are in partnership with SAMSA currently in addressing this need.

Provision of targeted technical training: We need to provide the requisite training at different levels of education, to provide necessary facilities, disciplines and degrees. Training and academic institutions need to take this on board, in conjunction with the previously mentioned needs for expanding capacity of the sector.

Leveraging existing funding sources: Funding exists within the Department of Education and Training that needs to be accessed and leveraged.

Integration of training and upskilling across the region: Leveraging our relationships with other African nations will allow us to develop targeted training capabilities across the region, spreading the cost and developing regional centres of excellence.

Expedite transformation in the sector: There is a lack of transformation in the industry that needs to be addressed, for example there is only one female stevedore company in the entire industry. Initiatives to increase female participation need to be identified and undertaken.

Identify opportunities to leverage BRICS: Develop a partnership with BRICS players to address skills development, skills transfer and training needs.

Enhancement of research capabilities: Investment in, and marketing of, specialised research capabilities.

Contract provisions for training and skills development: The drafting of contract inclusions, particularly on infrastructure projects awarded to foreign companies, ensuring skills transfer.





Other issues mentioned included:

Development of South African offshore shipping capacity: There is offshore oil exploration and exploitation both off the East and West coast. In South Africa we have PetroSA engaged in ongoing offshore exploration, but if you were to do an audit you would see that there are many missed opportunities for South African companies to be involved in these activities, which are mainly conducted and managed by foreign companies.

Port development: Africa's ports need to be repositioned to handle transshipment, ocean going and coastal shipping.

Hinterland connectivity: Synchronisation is needed to create inlets linking back into consumption centres around Gauteng.

Maritime safety and security: One of South Africa's main contributions to international trade is the provision of safe sea routes: we intervene in terms of safety, and our marine corps intervenes in security and policing. Nonetheless, our investment is 1% of GDP compared with other countries' at 2%. This must be reconsidered.

Fishing: Our fishing capacity is confined. We are giving away many fishing rights because we do not have the capacity to take advantage of them, particularly in the area deep sea fishing. We should build out capacity for deep sea development.

Shipping: Opportunities exist in South Africa and Africa for bulk shipping, including dry bulk (iron ore, coal) and wet bulk. These need to be structured, and entrepreneurs and private sector players should be supported in taking advantage of these opportunities.

Community involvement and social engagement: The alignment of maritime sector development priorities with social development priorities, and prioritisation of the cultivation and development of maritime and coastal communities is required.

Environmental protection: There is a need for the prevention of negative environmental externalities and development and implementation of appropriate environmental legislation.

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