TABLE OF CONTENTS

Overview of Transnet Port Terminals
Overview of Eastern Cape Terminals
  ✓ Features & Characteristics
  ✓ Volume Throughput
  ✓ Operational Performance
  ✓ Current and Future Projects
Closing
Transnet Port Terminals (Port Terminals) provides cargo handling services to a wide spectrum of customers. Operations are divided into four major market sectors, namely containers, bulk, break bulk and automotive and are organised into the relevant geographic regions.

Port Terminals manages 16 cargo terminal facilities across seven South African Ports with a staff complement of 5,746 as at December 2010.
STRATEGIC OUTLOOK -
There are key areas that in our view define Port Terminals’ future

Transnet’s Key Focus Areas
- Remain focused on its core commodities
- Aggressively drive an uncompromising competitiveness
- Become policy and regulatory wise
- Introduce private sector involvement wisely
- Develop our management and supervisory skills

Shareholder Compact
- Improve service levels and efficiencies
- Drive sustainable capital investment
- Improve productivity and reliability
- Meet policy and regulatory challenges positively and collaboratively
- Facilitate an export led and growing economy
- Find innovative means to introduce private sector involvement

TPT’s Key Focus Areas
- Introduction of competition in the container sector and the need to perform
- Exit from the Agricultural sector
- Driving Ngqura as a regional and south-south transhipment HUB
- The need to move Manganese out of PE

Strategic Customer Relationships are going to be a critical factor of our ability to compete

Key TPT Projects for the Medium Term
- Building Transnet Port Terminals into a world-class container terminal operator
- DCT berth deepening and scour protection
- Rebuilding Richards Bay
- Delivering on the expansion capacity

Port Terminals sees the expansion into other African ports as a Transnet opportunity, as either operating partner and/or as equity partners

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- Introduce private sector involvement wisely
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- Strategic Customer Relationships are going to be a critical factor of our ability to compete
TPT OPERATES 4 x MAIN TERMINALS IN THE EASTERN CAPE PORTS FOCUSSING ON THE MAIN COMMODITIES

<table>
<thead>
<tr>
<th>Commodities</th>
<th>Port Elizabeth</th>
<th>Ngqura</th>
<th>East London</th>
</tr>
</thead>
<tbody>
<tr>
<td>Containers</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Break bulk</td>
<td>✗</td>
<td></td>
<td>✗</td>
</tr>
<tr>
<td>Bulk</td>
<td>✗</td>
<td></td>
<td>✗</td>
</tr>
<tr>
<td>Cars</td>
<td>✗</td>
<td></td>
<td>✗</td>
</tr>
</tbody>
</table>

* footprint, (✗) joint venture
Source: Transnet Port Terminals
TERMINALS: EASTERN CAPE
EAST LONDON TERMINAL

SA ONLY RIVER PORT

KEY TERMINALS

• Car Terminal
• Combi Terminal
• Grain Elevator

SAFETY AND SYSTEMS ACCREDITATION

• ISO 9001
• ISO 14001
• OHSAS 18001
• NOSA
• ISPS
• Food Safety
• Railway Safety

STAFF COMPLIMENT

• 102 Employees
TERMINALS: EASTERN CAPE

EAST LONDON TERMINAL

CAPACITY

• 2,928 covered parking bays
• 1,000 open parking bays
• 1,411 quayside bays
• 135,000 Ro-Ro units per annum

ANNUAL THROUGHPUT

• 75,000 Ro-Ro units per annum

SAFETY AND SYSTEMS

ACCREDITATION

• ISO 9001
• ISO 14001
• OHSAS 18001
• NOSCAR

KEY CLIENTS

• MBSA
• Chrysler
• Porche
East London MPT – Car Terminal Operations

Automotive Norms - 2011/12 YTD

YTD 2011/12: 153
Planned 2011/12: 150
2010/11: 158
2009/10: 153
2008/9: 127
2007/8: 115
TERMINALS: EASTERN CAPE
EAST LONDON TERMINAL

CAPACITY

• 1 339 ground slots
• 93 000 TEU’s per annum

ANNUAL THROUGHPUT

• 60 000 TEU’s per annum

KEY CLIENTS

• MBSA
• Safmarine Maersk
• MOL
East London MPT – Combi Terminal Operations

Container Norms - 2011/12 YTD

- YTD 2011/12
- Planned 2011/12
- 2010/11
- 2009/10
- 2008/9
- 2007/8
CURRENT & FUTURE PROJECTS

Grain Elevator Refurbishment

- R20m Investment in addressing safety critical items and medium term sustainability
- Repairs to electrical, mechanical and dust extraction systems
- Project completion towards the end of 2011

Elitheni Coal Export Project

- Coal mined in the Eastern Cape for export and power generation purposes
- Off take agreements have been signed with international customers
- Initial volumes of 2.5 million tons per annum
- Potential investment in the East London terminal of R250 million

MBSA W205 Project

- New C-Class model to be produced in East London
- Potential increases in automotive export volumes and container volumes through the East London terminal
- Additional volumes could result in additional investment into port infrastructure i.e. additional automotive capacity to be created
TERMINALS: EASTERN CAPE
PORT ELIZABETH TERMINALS

KEY TERMINALS

• Container Terminal
• Car Terminal
• Breakbulk Terminal
• Bulk (Manganese)

SAFETY AND SYSTEMS ACCREDITIATION

• ISO 9001
• ISO 14001
• OHSAS 18001
• NOSA
• ISPS
• Railway Safety

STAFF COMPLIMENT

• 464 Employees
TERMINALS: EASTERN CAPE
PORT ELIZABETH CONTAINER TERMINAL

CAPACITY
400 000 TEU/Annum
3 600 TEU Ground Slots
740 Reefer Points
4 x STS Cranes
21 x Straddle Carriers

ANNUAL THROUGHPUT
317 000 TEU’s

SAFETY & SYSTEMS ACCREDITIATION
NOSA 5 STAR
ISO 9001 & 14001
OHSAS 18001

KEY CLIENTS
Maersk
Safmarine
Hamburg Sud

STAFF COMPLIMENT
299 Employees
Average Call Size: 841 TEU per vessel

Average Stay per Call: 20.9 hours
VOLUME THROUGHPUT PATTERNS FOLLOW THE AUTOMOTIVE AND REEFER MARKET TRENDS

TEUS

VOLUME THROUGHPUT PATTERNS FOLLOW THE AUTOMOTIVE AND REEFER MARKET TRENDS

TRANSHIPMENTS, 41.4%
IMPORTS, 33.2%
EXPORTS, 25.4%
OPERATION PERFORMANCE IS CONSISTENTLY WITHIN THE REQUIRED SERVICE LEVELS

**Ship Working Hour (SWH)**

**Gross Crane Hour (GCH)**

- **SWH**
- **TARGET**

- **GCH**
- **TARGET**
OPERATION PERFORMANCE IS CONSISTENTLY WITHIN THE REQUIRED SERVICE LEVELS
TERMINALS: EASTERN CAPE
PORT ELIZABETH TERMINAL

CAPACITY

5000 parking bays
2 Inspection and transfer areas

ANNUAL THROUGHPUT

150 000 units
70/30 Export/Import Split

SAFETY AND SYSTEMS ACCREDITATION

NOSA NOSCAR
ISO 9001 & 14001
OHSAS 18001

KEY CLIENTS

VWSA
GMSA

STAFF COMPLIMENT

23 Permanent
Outsourced driving services
Car Terminal - Export & Import Units

Units

Apr: 12002
May: 14382
Jun: 13496
Jul: 15000
Aug: 15000
Sep: 10000
Oct: 12500
Nov: 12500
Dec: 10000
Jan: 10000
Feb: 12500
Mar: 12500

10/11
11/12
11/12 Budget
PERFORMANCE EXCEEDS ALL CAR TERMINALS IN S.A

Units per hour

- 10/11 Units p Nett
- 11/12 Units p Nett
- Norm

PERFORMANCE EXCEEDS ALL CAR TERMINALS IN S.A
TERMINALS: EASTERN CAPE
PORT ELIZABETH TERMINAL

CAPACITY
4 X bins with capacity of 100 000t each.
Handling rate of 1200 tph
Optimum capacity of plant is 5.5Mt pa

ANNUAL THROUGHPUT
Current at 4.2M ton.
Rail capacity ramping up in next year to 5.5M ton

SAFETY AND SYSTEMS
ACCREDITATION
NOSA 5 STAR
ISO 3000
ISO 9001 & 14001
OHSAS 18001

KEY CLIENTS
ASSMANG
HMM
UMK
Kalagadi

STAFF COMPLIMENT
100 Permanent
60 Casuals
Bulk - Manganese Ore Exports

Tonnage

Apr 371657 371761
May 324580
Jun 384570
Jul 184570
Aug 384570
Sep 184570
Oct 384570
Nov 384570
Dec 384570
Jan 384570
Feb 384570
Mar 384570

10/11 11/12 11/12 Budget 11/12 Stock balance
Bulk Terminal - Manganese Ore Exports Handling Rate

Tons per Nett Ship hour

- 10/11 TPNHR
- 11/12 TPNHR
- NORM TPNHR
PE MANGANESE BULK PLANT REFURBISHMENT PROJECT – R600m

BEFORE

Reclaimer Slew

Reclaimer MCC

Old Control Room

Rebuilt Reclaimer A

AFTER

New Control Room
Roadways Rehabilitation and Environmental Cleanup

**BEFORE**
- Gravel roads

**AFTER**
- Operator cabin – charger car

PE MANGANESE BULK PLANT REFURBISHMENT PROJECT – R600m
MSC Catania became the first commercial container ship to be handled at Ngqura Container Terminal (NCT)
NCT started operation in October 2009 with state-of-the-art equipment covering all areas of operation.

**WATERSIDE**
- 6 x Mega – Max Ship-to-Shore Cranes
  - Outreach: 61m
  - 22 Containers Across Deck
  - Twin Lift Capability

**LANDSIDE**
- 22 x 41 Ton Rubber Tyre Gantry (RTG) cranes
  - 1 over 5 stacking height
  - 7 Stacking Rows + 1 Truck lane
- 36 Haulers and 36 Trailers
- 4 x Empty Container handlers
- 2 x Reach Stacker

**RAIL**
- 2 X RMG cranes.
- 4 x Rail tracks
- 1 Loco run-around track
STATE-OF-ART INTEGRATED (YEARD, GATE, VESSEL) NAVIS OPERATING SYSTEM

NAVIS – Production View

- Performance monitoring tool with 15 minutes interval updates.
- The tool is designed to give planning and operation visibility of performance per shift.
- Enables quick decisions making to manage deviations.

AUTOGATE

- Gate system is equipped with state of the art camera technology.
- System captures the state and condition of the container as the truck enters or exiting the terminal.

SPARCS

- Outlines containers in the yard by blocks for water side, land side and rail.
- The tool is used to monitor yard activities during operations.
AutoGate with Pre-Booking / Pre-Advice functionality improves truck processing time & reduces risk associated with human error.
State-of-Art Planning Centre provides a 3-D View of the Terminal & Real-Time Performance Monitoring & Security Surveillance
PEOPLE SKILL PROFILE

Operational Phase

- 386 Permanent Jobs Created (99% from the region)
  - Min Matric for ALL employees.
  - Min M+4 for planning staff
  - Additional permanent jobs in line with terminal growth
  - Stringent selection and recruitment criteria for all staff (psychometric testing etc)

- 2 x Maintenance Contractors (OEMs)
  - Toyota/Kalmar - 26 (All from the region)
  - Liebher - 8 (All from the region)

- Skill transfer
  - 22 Artisans currently undergoing training
  - 3 Supervisors
  - 3 Technical Managers
4 x MAIN PILLARS FORMED NGQURA CONTAINER TERMINAL VALUE PROPOSITION UPON WHICH NCT WAS BEING MARKETED

**Performance**
- High berth productivity (2-5 cranes per vessel)
- Efficient operations (28 moves per crane hour)
- RTG operation provides a high density stacking area

**Capacity in advance**
- Modern infrastructure (16.5m berth draft, 18m entrance channel draft, modern facilities)
- Current Container Capacity (provide 800,000 teu by 2009)
- Planned capacity (provide 1.5m teu by 2015, 2m teu end state)

**Berthing slots**
- Scheduled berthing (conformance to slot times)
- Efficient marine operations (2 hours guaranteed berthing time)
- Berth occupancy to be capped at 65%

**Rail connectivity**
- Efficient rail terminal (under 6 hour turnaround)
- Dedicated infrastructure and rolling stock (dedicated facilities)
- Efficient Jhb to Ngqura rail corridor

Ngqura Container Terminal Value Proposition
Average Call Size: 1,200 TEU per vessel

Average Stay per Call: 26 hours
VOLUME PROFILE INDICATE POTENTIAL OF NCT AS TRANSIPMENT HUB

TEUS

<table>
<thead>
<tr>
<th>Month</th>
<th>TEUs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apr</td>
<td>22,156</td>
</tr>
<tr>
<td>May</td>
<td>17,564</td>
</tr>
<tr>
<td>Jun</td>
<td>36,965</td>
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<tr>
<td>Jul</td>
<td>34,073</td>
</tr>
<tr>
<td>Aug</td>
<td>46,836</td>
</tr>
<tr>
<td>Sep</td>
<td>41,138</td>
</tr>
<tr>
<td>Oct</td>
<td>39,645</td>
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<tr>
<td>Nov</td>
<td>35,657</td>
</tr>
<tr>
<td>Dec</td>
<td>32,150</td>
</tr>
<tr>
<td>Jan</td>
<td>30,879</td>
</tr>
<tr>
<td>Feb</td>
<td>40,180</td>
</tr>
<tr>
<td>Mar</td>
<td>31,071</td>
</tr>
<tr>
<td>Apr</td>
<td>49,538</td>
</tr>
<tr>
<td>May</td>
<td>39,677</td>
</tr>
<tr>
<td>Jun</td>
<td>33,053</td>
</tr>
</tbody>
</table>

- **Imports, 17.0%**
- **Exports, 17.3%**
- **Transhipments, 65.7%**

The volume profile indicates the potential of NCT as a transipment hub.
Operational performance meets & exceeded shareholder (GCH) & customer (SWH) KPIs /norms for a start-up terminal. The norms are align with international benchmarks.
LANDSIDE OPERATIONS PERFORMANCE EXCEEDS SERVICE LEVELS

RAIL VOLUMES

Truck Volumes

Rail Turnaround Time

NCT TTAT
CURRENT & FUTURE PROJECTS

PECT

- 2 x 2nd Hand (8 years old) IMPSA STS from DCT due delivered by end 2012
- Replacement program for 16 straddle carriers starting in 2014

PE : MPT

- Recently completed Manganese Refurbishment
- Awaiting a decision re future of the terminal post 2016/17.
- Car Terminal expansion recently completed

NCT

- 100m extension of berth by end July 2011
- Dredging for berths 102 and 103 to be completed 1st quarter 2012
- 14 Haulers – Delivery by 1st quarter 2012
- 14 Trailers - Delivery by end 2011
THANK YOU