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# South Africa Ocean Opportunities Report

For the Southern African – German Chamber of Commerce and Industry


AHK Deutsche Industrie- und Handelskammer für das südliche Afrika
Southern African-German Chamber of Commerce and Industry

supported by:

Partners in Transformation
Agentur für Wirtschaft und Entwicklung

german cooperation
DEUTSCHE ZUSAMMENARBEIT

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# Transportation
## in South Africa

## Introduction

South Africa's shipping sector is critical to the country's economic position. The country is ranked 1st in Africa and 39th in the world in terms of export flows. South Africa has 8 main ports, the port of Durban is the most active and is located in the province of KwaZulu-Natal (Indian Ocean). The country is located on a major shipping route and 58% of South Africa's gross domestic product is based on trade with 98% of South Africa's trade volume transported by ship. The shipping sector has a large number of shipbuilding companies that play a major role in helping to expand the country's fleet. The funds received through Operation Phakisa have enabled Transnet (national port operator) to create projects to renovate and upgrade existing ship repair facilities, including dry docks, slipways, repair docks, and ship lifting facilities - The key shift since 2021/22 is the move from "capacity planning" to performance recovery and structural reform, with explicit openings for private sector participation and technology-enabled modernisation. These ship repair facilities include a number of dry docks located in Durban, East London and Cape Town.

## Facts and Figures

All **eight** of South Africa's major ports are planned and operated by Transnet - moving **over 300 million** of tons of seaborne cargo annually

60%

Durban's annual throughput of containers makes up **more than 60%** of the country's total.

Durban Port is the **busiest** in Africa and the **largest** container facility in Southern Africa.

**The Port of Ngqura** is the deepest container terminal in Africa.

**Saldanha Bay** is one of the largest exporting ports of ore in the whole of Africa.

**The Port of Cape Town** is the biggest refrigerated container facility in Africa.

**58 Main Companies** within the maritime transport sector, including shipbuilders.

**15** South Africa is among the **Top 15 countries that trade by sea.**

With approximately **90%** of trade moved by sea constituting **50%** of the GDP, South Africa is known to have an '**island economy**'.

## Watchpoints

Congestion and reliability remain material until reforms and Private Sector Participation (PSP) transactions translate into sustained performance improvements in ports of South Africa - with Cape Town and Durban ranking low in CPPI indicating need for urgent reform and solution demand.

## Selling Opportunities

- **Port equipment + automation** (cranes, sensors, yard/stacking systems, spares & maintenance)
- **Digital solutions** (TOS, tracking/visibility, cybersecurity, digital twins, analytics)
- **Engineering services** (berth upgrades, dredging support, intermodal infrastructure)
- **Skills & operational excellence programmes** (lean ops, safety, maintenance training)

## Buying Opportunities

**1**

**Advanced logistics & freight management solutions**
South African-built logistics software and services that improve cargo visibility and delivery performance, including freight forwarding support, customs/document workflows, track-and-trace, route optimisation, and control-tower operations. Many providers can bundle tech with operations, giving overseas buyers a single accountable partner for Southern Africa lanes.

**2**

**Marine vessel maintenance & repair services**
South African shipyards and marine engineering firms for inspections, dry-docking, planned maintenance, repairs, and retrofits (hull, propulsion, electrical, coatings). SA providers can deliver class-aligned work packages, rapid turnaround support, and specialist fabrication, making this attractive for vessels routing via Durban, Richards Bay, Cape Town or Gqeberha.

**3**

**Sustainable transport infrastructure components**
Locally manufactured or assembled components and services for port/harbour and coastal transport infrastructure e.g. marine fabrication, modular pontoons, fendering/mooring elements, corrosion protection, and maintenance spares. SA suppliers often combine fabrication with installation and after-sales support, reducing procurement fragmentation for overseas project owners.

## Main Players

- Robertson & Caine
- MSC Shipping
- Vuka Marine
- BP Shipping
- Elgin Brown and Hamer

## Policies

- Comprehensive Maritime Transport Policy (CMTP) for South Africa

## Contacts

- Ports Regulator of South Africa.
- South African Maritime Safety Authority (SAMSA).
- Transnet Port Terminals (TPT).
- Transnet National Ports Authority (TNPA).
- Trade Commissioner Service in South Africa

# Fisheries and Aquaculture in South Africa

## Introduction

In South Africa (SA), the unprocessed fish sector can be divided between large-scale commercial fishing and all other forms of fishing (from subsistence and small-scale enterprises to recreational fishing and aquaculture). South Africa is ranked 5th in Africa for total fish production and 36th in the world -the country has a mature wild-capture fisheries industry hiring over 18,000 people nationwide. Aquaculture remains smaller with less than 0.05% of GDP but is increasingly policy-enabled and investment-relevant (biosecurity, authorisations, traceability, cold chain). The marine fisheries sector is one of the most important income sectors in South Africa and plays a key role in the food security, a national priority. The government has put in place initiatives and policies to ensure that ocean space is used for the benefit of all citizens. Indeed, operation Phakisa is a major South African initiative, aimed in part at developing the aquaculture and fair trade fisheries sector -with a specific allocation for aquaculture of approximately $3.1 billion.

## Facts and Figures

**R20bn**

Stats SA estimates the ocean fisheries & related services industry generated **~R19.9bn income (2023).** Stats SA's industry scope explicitly excludes fish farms/hatcheries.

**179.12% increase**

of the gross value of aquaculture production from **2000 - 2018** in South Africa - slightly stagnating since then.

**18%**
**Growth per Annum**

for the **total sales and transfers-out** of own-caught fish and other fish products in South Africa.

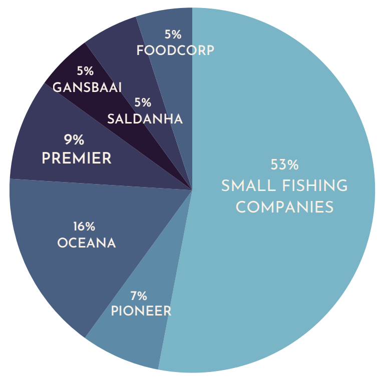
**90%**

The Western Cape accounts for **90%** of the catch value of the fisheries sector.

Marine and freshwater aquaculture is currently conducted in ca. **210** farms in South Africa. Species **most commonly farmed** include: abalone, catfish, finfish, trout, mussels, oysters and tilapia.

Fish-related products generating the most sales are; **Hake (31%)**, **Squid (22.9%)**, **Anchovy (9.3%)**, **Lobster West coast rock (5.3%)**, **Lobster South Coast rock (4.5%)**, **Pilchards & Sardines (4.5%)**, **Other (22.6%)**.

**Shares in Aquaculture Processing Sector in South Africa**




## Watchpoints

- Fragmented authorisations and compliance burden until the Bill is finalised/implemented;
- Skills gaps in farm operations & quality systems slowing industry growth.

## Buying Opportunities

**1**

**Sustainable aquaculture feed & nutrition products**
Procure South African feed formulations, additives, and nutrition advisory services tailored to local species and conditions, including performance-focused diets for finfish, abalone, and emerging mariculture. Buyers can contract suppliers that provide both product and technical support (feeding protocols, FCR improvement), supporting reliable production and quality consistency.

**2**

**Cold-chain & post-harvest handling solutions**
Buy from SA cold-chain operators and integrators that can supply packaging, temperature-controlled storage, handling SOPs, and end-to-end logistics for seafood exports. Many providers offer turnkey services (pre-cool, freeze, store, consolidate, ship) and can align handling to buyer specifications, improving shelf-life, yield, and compliance.

**3**

**Certification & traceability services for fisheries**
Engage South African traceability providers, auditors, and sustainability services to strengthen chain-of-custody, catch documentation, and reporting. This can include digital traceability tools, compliance advisory, and third-party verification support—useful for overseas buyers needing robust ESG assurance and market access requirements for seafood imports.

**4**

**Value-added seafood processing capability & equipment**
Source processing services and, where relevant, locally manufactured/assembled equipment from South African processors and engineering firms—filleting, portioning, freezing, smoking, packaging, and QA systems. Overseas buyers can secure contract processing capacity or co-develop private-label products, leveraging SA know-how and export-oriented production standards.

## Selling Opportunities

- Cold-chain & processing upgrades (refrigeration, QA/QC labs, packaging, certification support)
- Traceability & compliance systems (catch documentation, chain-of-custody tooling, audit services)
- Aquaculture inputs (RAS components, monitoring sensors, feed innovation, veterinary/biosecurity services)

## Main Players

- Oceana
- Premier
- Pioneer
- Sea Harvest
- Irvin & Johnson Holding Company
- Abagold

## Policies

- Marine Living Resources Act [No. 18 of 1998]
- Policy for the Small Scale Fisheries Sector in South Africa
- Aquaculture Development Bill
- National Aquaculture Policy Framework for South Africa

## Contacts

- Department of Forestry and Fisheries and the Environment (DFFE)
- South African Fisheries Development Fund
- CSIR
- Trade Commissioner Service in South Africa
- Aquaculture Association of Southern Africa
- WWF South Africa
- Invest SA

# Marine Energy
## *in South Africa*

## Introduction

Southern Africa is surrounded by energetic seas with high potential for offshore wind and wave power, and possibly even ocean current power, however despite its potential, the Ocean Renewable Energy space in SA has not been fully explored. South Africa is ranked 1st in Africa when it comes to the total capacity to produce electricity from all renewable resources (ca. 18 gigawatts in 2025). With the recent shortages in power supply and resulting loadshedding, SA needs to look towards alternative forms of energy. Researchers have explored the option of using marine renewable energy, however, there is often insufficient investments for these studies to create viability for each testing project they have. South Africa has managed to test Ocean Current Energy, Wave Energy, Ocean Thermal Energy Conversion (OTEC) and have had positive results but insufficient funding to continue. The market has consolidated around grid-connected renewables plus export-oriented green hydrogen derivatives, with marine/port interfaces becoming increasingly important (desalination, port retrofits, storage/handling, maritime safety).

## Facts and Figures

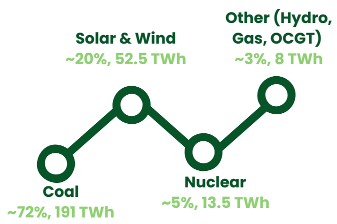
South Africa is classified as having **'high-energy coastlines'** due to long period swell and storm conditions. Floating solar has not been tested in SA.

19%

Renewables accounted for over **19%** of South Africa's power mix in 2025, and growing fast.

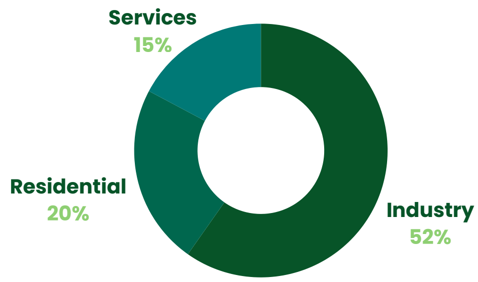
South Africa targets a **29% reduction** of energy consumption and a **26%** share of **wind and solar** in the power capacity in **2030** -with private solar being a large contributor.

**South Africa's main sources of energy 2026 (estimates)**




Offshore **wind power** has a high potential to work in South Africa with tests showing floating turbines producing up to **589GW**.

**Main Electricity Consumer in SA**




## Selling Opportunities

- Engineering, procurement and construction (EPC) for renewables-to-hydrogen systems
- Desalination, water treatment, environmental services, and monitoring technologies
- Port retrofits (safety systems, storage/handling equipment, training, emergency response services)
- Certification/compliance services (standards, auditing, traceability)

## Watchpoints

- Port and rail performance constraints can delay export competitiveness;
- Permitting, grid capacity and water constraints need early de-risking.

## Buying Opportunities

**1**

**Offshore wind components & installation services**
Procure South African fabrication, marine construction, and installation support for offshore wind projects—steelwork, marine logistics, port staging, lifting support, and O&M readiness services. SA firms can provide locally anchored execution teams and interface well with ports and coastal authorities, especially where projects require regional supply-chain resilience.

**2**

**Wave & tidal energy systems support**
Buy engineering, prototyping, testing support, and coastal deployment services from South African innovators and technical firms working on wave/tidal solutions. This can include site assessment, moorings, materials, maintenance planning, and pilot operations—useful for overseas developers looking for Southern Hemisphere testbeds and applied know-how.

**3**

**Marine energy storage & grid integration services**
Engage South African integrators for storage design, power electronics integration, monitoring systems, and performance optimisation for coastal energy assets. Providers may bundle equipment integration with commissioning, controls, and maintenance support, helping overseas buyers de-risk deployment and ensure stable operations in coastal or port-adjacent settings.

**4**

**Energy efficiency solutions for coastal installations**
Procure SA-based audits, retrofit services, and efficiency technologies for coastal facilities (tourism precincts, ports, processing plants). Typical packages include HVAC optimisation, refrigeration efficiency, control systems, and operational improvements—often delivered as measurable performance projects, which suit overseas owners seeking quick wins on cost and emissions.

## Main Players

- Exarro
- Eskom
- Sasol

## Policies

- Renewable Energy Policy
- NERSA Concurrence with the Section 34 Determination for 2 500MW of New Nuclear Generation Capacity
- Ocean Energy Policy Brief

## Contacts

- South African Wind Energy Association (SAWEA)
- CSIR
- Green Cape
- South African National Energy Development
- Trade Commissioner Service in South Africa

# Security and Defence
## *in South Africa*

## Introduction

South Africa has the largest Exclusive Economic Zone (EEZ) in Africa with a coverage of 1,535,538 km2 - increasing the need for an efficient maritime security and defence. The government has made it an initiative through Operation Phakisa to protect the EEZ. Also a country that is on a major shipping route, particularly with increased Red Sea rerouting, maritime security is essential. The Maritime Road Map supports the maritime security component with Institutions such as the South African Maritime Safety Authority (SAMSA), in collaboration with the Department of Science Technology and Innovation (DSTI), the South African International Maritime Institute (SAIMI), and CSIR (national research) are all involved in this Maritime Road Map to take South Africa to a globally recognised maritime nation by 2030. The main maritime security challenge is Maritime Domain Awareness and rapid response: a vast EEZ, high shipping exposure, and constrained sea-going capacity create demand for data integration, surveillance services and multi-agency coordination.

## Facts and Figures

**3/10**

In FY2024, the SA Navy achieved **~3 of a target of 10 sea-hours** (down from **~6.8/10 in FY2022**).

Key **naval bases** and dockyard-linked facilities include **Simon's Town** (primary naval base), **Durban**, **Saldanha Bay** and **Gqeberha** (Port Elizabeth), but only three shipyards that build patrol South African vessels for Fisheries, Police and Navy.

The **main naval combat** and **support vessels**, procured by the Strategic Defence Procurement Package, are currently employed in securing South Africa's **maritime domain** and **gathering intelligence**.

**The main SA Navy assets** include; **4** Valour-class frigates, **3** Heroine-class submarines, **3** Warrior-class offshore patrol vessels and **4** River-class mine counter-measure vessels.

Through the Space X Falcon 9 rocket launch on 13 January 2022, **South Africa sent 3 satellites** to facilitate in monitoring its **exclusive economic zone** using **AIS data**.

According to the Maritime Road Map, **SA has already developed technologies** (satellite system & stratospheric communications platform) that can be used to avoid the capturing of ships by pirates.

The maritime security and defence industry is **under-stocked** and experiences **constant reallocation of money by the government**.

## Selling opportunities

- MDA "data-as-a-service" (AIS analytics, anomaly detection, route risk scoring)
- Remote sensing and environmental monitoring
- Training and capacity-building (operators, safety, SAR support, compliance workflows)
- Systems integration (multi-agency data fusion, interoperability, cybersecurity hardening)

## Watchpoints

- Fragmented mandates across agencies can slow procurement and operational integration;
- Solutions that are modular, interoperable and service-based are typically easier to adopt.

## Buying opportunities

**1**

**Coastal surveillance & maritime monitoring systems**
Contract South African providers of maritime domain awareness solutions—data fusion, analytics, sensor integration, and operational support—tailored to EEZ monitoring, illegal fishing detection, and route risk awareness. These offerings often combine local domain expertise with deployable technology stacks, allowing overseas buyers to procure an end-to-end service.

**2**

**Port & harbour security services and solutions**
Procure SA-based security integrators and service providers for access control, perimeter systems, incident response planning, and operational security staffing in port-adjacent environments. Many local firms understand the regulatory and operational realities of South African ports and can implement practical, compliant solutions with rapid deployment and maintenance support.

**3**

**Cybersecurity platforms for marine infrastructure**
Engage South African cybersecurity firms for risk assessments, SOC services, OT/IT hardening, and incident response specifically suited to port, logistics, and maritime operator environments. Buyers can contract managed services to continuously monitor and protect operational systems, reducing downtime and safeguarding sensitive trade and vessel data.

## Main Players

- Paramount Group
- SA Shipyards
- Maritime Safety Training and Development (Pty) Ltd
- Armscor

## Policies

- South Africa's Maritime Foreign Policy
- Department of Defence Strategic Plan for 2025–2030

## Contacts

- ISS Africa
- Trade Commissioner Service in South Africa
- South African Maritime Safety Authority (SAMSA).

# Marine Biotechnology & Biodiscovery
*in South Africa*

## Introduction

Marine biotechnology (incl. marine biodiscovery/bioprospecting) covers the discovery and commercialisation of bioactive compounds, enzymes, biomaterials, marine microbial solutions, and algae-based products for applications in health/pharma, cosmetics/nutraceuticals, industrial biotech, aquaculture health, and environmental services. In South Africa, the subsector sits at the intersection of (i) national bioeconomy development and (ii) the Ocean Economy agenda, with growing interest from research institutions and innovation platforms.

## Facts and Figures

**Ocean Economy Context:** South Africa's oceans economy has been positioned (via Operation Phakisa) as having potential to contribute up to **~R177bn to GDP by 2033** (national headline target).

**Technology Shift Enabling Biotech Entrepreneurship:** The cost to sequence a human genome declined from about **US$100m** (early 2000s) **to ~US$1,000** (c. 2017), materially lowering barriers for data-driven life science innovation.

**Editing & Synthetic Biology Momentum:** Publications referencing **CRISPR** grew sharply, reaching **several thousand per year by 2016–2017** (proxy for accelerating R&D activity).

**South African Venture-Support Signal:** OneBio references a **R83.5m** seed investment fund with typical ticket sizes **from ~R500k to ~R16m**, deployed in tranches against milestones (useful benchmark for early-stage structuring).

**Illustrative SA Exit Case (biotech):**
Kapa Biosystems (Cape Town-founded) is cited as being sold to Roche(2015) **for ~R6.3bn** (~US$445m).

**Global Financing Tailwinds:**
Venture investment in biotech startups rose strongly through the 2010s (PitchBook-referenced trendline), supporting increased corporate partnering and M&A appetite globally.

## Buying Opportunities

**1**

**Marine-derived pharmaceuticals & nutraceuticals pipeline services**
Procure South African contract R&D and early-stage discovery support—from screening and validation to proof-of-concept—via universities, labs, and applied institutes. Overseas corporates can structure research collaborations, sponsored studies, or co-development agreements to access marine bioactive discovery capacity and scientific talent within compliant frameworks.

**2**

**Seaweed & algae bioproducts**
Buy South African seaweed/algae-based products and services (biostimulants, feed ingredients, biomaterials inputs, specialty extracts) from local producers and processors. Procurement can include supply contracts plus joint product development, especially where overseas buyers want traceable inputs with a credible sustainability narrative and consistent QA.

**3**

**Bioremediation & environmental monitoring technologies**
Source SA providers offering bioremediation services, bio-based treatment approaches, and environmental monitoring tools for coastal industries and ports. Overseas buyers can procure packaged solutions that include monitoring design, field deployment, lab analytics, and reporting—useful for compliance, ESG disclosure, and operational risk management in sensitive marine areas.

**4**

**Aquatic organism genetics & breeding services**
Engage South African specialists for genetics, breeding programme design, and performance monitoring for aquaculture and mariculture species. Procurement can include advisory, testing services, and operational protocols aimed at improving resilience, growth rates, and biosecurity—supporting stable supply for export-linked value chains.

**KEY CONSTRAINTS TO REFLECT**

Biosecurity, diagnostics, probiotics/feeds, and nature-based water-quality solutions (cross-over between biotech and aquaculture value chains).

ABS compliance can be administratively heavy; early legal scoping and benefit-sharing design reduces delays.(dffe.gov.za)

## Main Players

**Policy / enabling environment**
- Department of Forestry, Fisheries and the Environment (DFFE)
- Bioeconomy policy leadership (SA government)

**Research & Applied Capability**
- Rhodes University (Marine Natural Products / biodiscovery platform)

**Innovation / entrepreneurship support**
- OneBio (venture studio + seed investment approach)
- BioFISA (example of public–donor programme logic)

## Policies

- **Bio-economy Strategy:** National framework to guide biosciences RDI and commercialisation pathways.(gov.za)
- **ABS / bioprospecting compliance (NEMBA + BABS regulations):** Commercialisation-oriented bioprospecting activities typically require permits and compliant benefit-sharing arrangements; guidance and templates are published by DFFE / Government Gazette materials. (dffe.gov.za)
- **Operational permitting support:** DFFE provides permit application forms and "how-to" guidance documents(useful for corporates structuring partnerships). (dffe.gov.za)

# Coastal & Marine Tourism
*in South Africa*

## Introduction

South Africa's coastal and marine tourism (CMT) leverages a ~3,900 km coastline and a ~1.5 million km² EEZ, spanning the Atlantic and Indian Oceans and enabling year-round nature, adventure and culture travel. Beyond iconic landscapes, the country's biodiversity-based proposition is strengthened by the "Marine Big 5" (whales, dolphins, sharks, seals and penguins) and a growing focus on sustainable coastal destination management through Operation Phakisa and the national CMT implementation agenda. Using the CMTIP 2015 baseline, coastal & marine tourism represented roughly ~10% of SA tourism direct GDP (CMT: R11.9bn vs tourism TDGDP ~R118.9bn), underscoring its strategic weight within the broader tourism economy.

## Facts and Figures

- 80% — **R21.4bn direct GDP** contribution by **2026** (from **R11.9bn** in 2015)
- **116,000 direct jobs** by **2026** (from **64,400** in 2015)
- **42 Marine Protected Areas (MPAs)** protecting **~5%** of South Africa's EEZ
- 1.79bn / 127,000 — **2024/25 cruise season (Western Cape): R1.79bn** contribution to provincial GDP-R, with **~127,000 passengers** (preliminary industry reporting)
- **Blue Flag & eco-label momentum (2024/25): 48 beaches, 4 marinas, 7 tourism boats** recognised for high standards in safety, environmental management and accessibility

## Watchpoints

- **Permitting and compliance** (boat-based activities, MPAs, coastal developments) require early planning and specialised local expertise.
- **Infrastructure reliability & service levels** in some nodes can constrain growth; projects that bundle upgrades with operational capacity-building tend to be more bankable.
- **Environmental integrity and social licence**: benefit-sharing, community participation and credible eco-standards increasingly influence access, reputational risk and long-term viability.

## Main Players

- **Department of Tourism (national lead)**: CMT implementation, destination development and enabling frameworks
- **DFFE**: Ocean governance, MPAs, permitting interfaces and environmental compliance
- **WESSA (Blue Flag / Green Coast)**: Eco-labels and coastal management standards
- **SANParks & provincial conservation agencies**: Protected areas and concessions for nature-based tourism
- **Destination marketing / cruise platforms (example)**: Wesgro / Cruise Cape Town (cruise ecosystem coordination)
- **Innovation & convening (sector-adjacent)**: Accelerators and industry platforms supporting blue/eco innovation and supplier readiness (including Ocean Innovation Africa as a corporate engagement channel).

## Buying opportunities

**1 — Sustainable coastal resort development services**
Procure South African development teams to deliver low-impact coastal assets: feasibility, permitting support, design, construction management and operations. Suitable for eco-lodges, concessions and upgrades aligned with destination standards and community benefits.

**2 — Eco-tourism and marine experience operators**
Contract South African operators for compliant, high-quality marine experiences: wildlife excursions, expedition products, diving/surf guiding and conservation-linked itineraries. Ideal for corporate delegations, incentive travel and tour wholesaler packaging.

**3 — Water-based recreation equipment & safety services**
Source South African providers for boating support, safety planning, training, equipment supply/maintenance and activity management systems. Integrated packages strengthen visitor safety, reliability and duty-of-care for premium coastal experiences.

**4 — Digital marketing, booking & itinerary platforms**
Procure South African traveltech and content services: booking engines, itinerary tools, operator aggregation, performance marketing and multi-language content. Improves conversion, visitor information quality and data-driven destination promotion.

**5 — Cultural heritage & marine interpretation services**
Buy community-rooted guiding and interpretation: heritage routes, storytelling, interpretive design, local crafts/food linkages and cultural immersion. These services strengthen authenticity, social licence and differentiated visitor experiences.

## Selling opportunities

- **Beach precinct & tourism infrastructure upgrades:** access, amenities, universal accessibility, wayfinding, low-impact materials in priority coastal nodes.
- **Bathing-water quality + wastewater/stormwater solutions:** monitoring sensors, lab/testing capacity, data platforms, treatment optimisation to reduce pollution-related closures.
- **Tourism safety & rescue readiness:** lifesaving equipment, communications, training systems, incident management for beaches and boat-based activities.
- **Permitting/compliance enablement:** tools and advisory to streamline concessions and marine activity compliance; audit-ready SOPs and reporting.
- **Destination growth systems:** digital destination management, marketing/routes/events packaging, and data for planning, skills and service quality uplift.

## Policies

- **Operation Phakisa – Oceans Economy**: national programme to unlock oceans-economy value and implementation coordination
- **Coastal & Marine Tourism Implementation Plan (CMTIP)**: nodal approach; six thematic pillars incl. permitting, safety, skills and infrastructure
- **Marine Spatial Planning Act (16 of 2018)**: legal framework supporting predictable multi-use ocean planning

# KwaZulu-Natal (KZN)

*Ocean Economy Zoom-in (2024/25)*

## Introduction

KwaZulu-Natal is South Africa's primary Indian Ocean gateway, anchored by the Port of Durban (the country's most active port) and the Port of Richards Bay. The province concentrates near-term sourcing opportunities in port modernisation, ship repair and marine services, cold-chain logistics for seafood, and enabling infrastructure for green fuels.

## Facts and Figures

**Ports and performance**:
Durban is the most active South African port and is located in KZN.

**Port efficiency pressure:**
In the World Bank CPPI (2024 dataset), Durban ranked 403/403 under the "administrative approach" methodology—reinforcing the case for upgrades, digitalisation, and new operating models.

**Private participation underway (Durban):**
Transnet selected ICTSI as preferred bidder for the Durban Container Terminal Pier 2 concession (implementation to follow contract finalisation).

**Growth optionality (Richards Bay):**
Plans to expand Richards Bay's container handling capacity (including private-sector participation proposals) create opportunities for equipment, systems integration, and intermodal services.

**Coastal stewardship is material for investors:**
KZN's "State of the Coast" reporting highlights substantial treated wastewater discharge via Durban outfalls and localised ecosystem pressures—strengthening demand for monitoring, treatment optimisation, and compliance solutions.

**Blue foods at community scale:**
Traditional fish kraals at Kosi Bay are reported at roughly 150 tonnes/year (order of magnitude), signalling the importance of community-linked value chains and traceability.

**Marine biotech signal:** National bioprospecting permitting has included marine-derived permits, and KZN reporting flags both potential and regulatory intensity (ABS/bioprospecting compliance).

## Priority Sourcing Opportunities

### 1) Transport, ports & maritime services

- Ship agency, shipping support & marine services (agents, operators, bunker/supply chains, port services) clustered around Durban/Richards Bay; source via SAASOA member listings.
- Freight forwarding / customs clearing / project logistics: source vetted providers via SAAFF (freight forwarders' association) and/or FIATA directory (South Africa).
- Industrial supply + fabrication/service vendors for port/industrial operations via RBIDZ sector ecosystem (marine industry development).

### 2) Blue foods & coastal value chains

- Time-critical cold chain & perishables logistics (air/sea interface) via Dube Cargo Terminal / Dube TradePort logistics ecosystem.
- Shellfish / mariculture supply chains (incl. oyster-related activity) and technical interfaces via Durban's marine science institutions (useful for pilots, QA, monitoring and industry linkages).
- Export-ready suppliers: request shortlists by product category through TIKZN's export portal / trade facilitation channel.

### 3) Marine energy

- Renewables / energy industry suppliers anchored in the RBIDZ (energy + industrial manufacturing ecosystem) for components, fabrication and project services.
- Port-adjacent industrial services relevant to future fuels and energy logistics routed through Durban/Richards Bay corridor (planning, industrial services, logistics support).
- Industrial investors/suppliers can be identified through RBIDZ tenders/sector pipelines (use RBIDZ as a structured entry point for vendor discovery).

### 4) Security, safety & maritime domain capability

- Maritime compliance, operations support and port-linked service providers: source through port ecosystem networks (Durban/Richards Bay) and SAASOA supplier landscape.
- Ocean observation / coastal monitoring / data services from Durban-based SAAMBR / ORI (monitoring, surveys, applied research services).
- Marine engineering / repair ecosystem discovery: use RBIDZ marine industry base + SAASOA networks to identify relevant local contractors.

### 5) Marine biotech & ocean science services

- Contract research, applied marine science and specialist services via Durban's SAAMBR / ORI (research services and sector-relevant projects).
- Science-to-industry partnering routes through the same Durban institutions (use as entry points for labs, expertise, pilots and technical validation).

### 6) Coastal & marine tourism products

- World-class nature-based tourism supply around iSimangaliso Wetland Park (operators, lodges, guiding, community-linked experiences).
- MPA-linked marine experiences (diving, charters, wildlife experiences) anchored by legally protected sites such as Aliwal Shoal MPA and Protea Banks MPA.
- Verified tourism operators and service providers (DMCs, operators, experiences) via the SATSA Member Directory.

# Practical BUY-FROM-SA Guide

## Cross-Cutting Supplier Discovery Channels

- **Transnet supplier channels (ports/rail)**: start with Transnet eTenders / eSupplier Portal and vendor onboarding guidance (incl. National Treasury supplier registration references).
- **Port authority / port ecosystem**: Transnet National Ports Authority (TNPA) for port services, port-linked operators, and referrals.
- **KZN export + investment facilitation**: Trade & Investment KwaZulu-Natal (TIKZN) (incl. its export information portal) can route German buyers to vetted KZN exporters and service providers.
- **KZN industrial platform for suppliers (esp. logistics/energy)**: RBIDZ and Dube TradePort for SEZ/IDZ-based suppliers and logistics solutions.
- **Performance/governance context (useful for diligence)**: Ports Regulator annual reports.

## 1) Transport, Logistics and Maritime Services

**A. Port/terminal operations, cargo handling, warehousing and 3PL services (Durban/Richards Bay and other ports)**

- **TNPA** (port landlord and ecosystem gateway) for referrals to licensed operators and port service categories.
- **Transnet PSP** (for larger contracting models / concessions / integrated services calls).
- **TIKZN** (to identify KZN-based logistics exporters/service providers).
- **RBIDZ** (Richards Bay supplier ecosystem and industrial services).

**Practical Tip**: for state-linked contracting, insist suppliers demonstrate registration and track record via Transnet tender systems.

**B. Ship agency, port clearance, marine surveying and related maritime services**

- **SAASOA** (membership base of ship operators/agents; useful directory starting point).
- **SAMSA** (regulator; helps validate compliance expectations for maritime service providers).
- **TNPA** (local port contacts and service ecosystem).

**C. Ship repair, dry-docking, retrofits and marine engineering (incl. KZN capacity)**

- **SAASR (shipbuilders & repairers association)** to identify credible yards and specialist repairers.
- Example large providers to start outreach (then widen via SAASR):
  - **DORMAC Marine & Engineering**
  - **Sandock Austral Shipyards**
- **SAMSA** (compliance/reference checks; class/standards alignment).

**D. Dredging, marine works and hydrographic-related services**

- **TNPA Dredging Services** (anchor gateway; can also indicate accredited subcontractors).
- **SAMSA** (navigation/safety compliance expectations for marine works contractors).

**E. Boatbuilding / marine craft manufacturing (workboats, leisure craft, niche components)**

- SAASR (shipbuilders/repairers network; good for workboats and specialist yards).
- Example manufacturer for credibility benchmarking: Robertson & Caine (yacht building).

# Practical BUY-FROM-SA Guide

## 2) Blue Foods (Fisheries, Aquaculture, Value Chains)

**A. Procure sustainably sourced South African seafood (wild-caught and processed)**

- **SADSTIA** (deep-sea trawl industry body; strong entry point for hake/value chain leads).
- **WWF-SASSI** (screen suppliers/species against sustainability guidance; useful for procurement policies).
- Export-capable corporate processors as initial market gateways (then widen via industry bodies):
  - Sea Harvest
  - Oceana Group / I&J

**B. Pelagic products (e.g., sardine/anchovy value chains)**

- **SAPFIA** (pelagic fishing industry body; best starting directory for key producers).
- **WWF-SASSI** (species/procurement screening).

**C. Mariculture products (abalone, oysters, mussels and niche coastal aquaculture)**

- **AASA** (Aquaculture Association of Southern Africa) for operators and service providers.
- **South African Abalone Export Council** (abalone export-oriented supply chain).

**D. Traceability, "hook-to-cook" transparency and sustainability assurance services (as a procurement add-on)**

- **WWF-SASSI** for sustainable sourcing frameworks and partner references.
- **ABALOBI** (example of SA-based fisheries value-chain / traceability platform to explore where relevant).

## 3) Marine Energy

**A. Local project development, feasibility, ESG/permitting and market intelligence services (offshore wind / coastal renewables / green hydrogen export interfaces)**

- **GreenCape** (industry development agency; strong entry point to the green hydrogen and broader clean-tech ecosystem).
- **HySA (**DSTI-linked hydrogen RDI platform; useful for technical partners and research capability routing).
- **CSIR** (applied research + data capability relevant to coastal/marine contexts).

**B. Local supply-chain / service provider discovery for wind and related infrastructure**

- **SAWEA (industry body; practical for supply chain/referrals).**

**C. Port-linked clean fuels and components logistics support (Durban/Richards Bay and other nodes)**

- **TNPA** (port interface and services ecosystem).
- **Transnet PSP** (where infrastructure/terminal partnering models are relevant).
- **RBIDZ and Dube TradePort** (KZN industrial/logistics platforms for suppliers and service providers).

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# Practical BUY-FROM-SA Guide

## 4) Security & Defence (Maritime Cecurity Focus)

**A. Maritime Domain Awareness (MDA) analytics, coastal monitoring, data integration and systems support**

- **CSIR** (credible gateway for applied ocean/coastal monitoring capability and partnerships).
- **SAMSA (**regulatory context; can guide compliance expectations for monitoring/safety-related deployments).
- For policy/architecture context and credible local expert networks: **Institute for Security Studies (ISS)** maritime workstreams.

**B. Vessel maintenance/refit/build capability relevant to patrol/support craft**

- **SAASR directory** (shipbuilders/repairers network).
- **Benchmark providers for initial outreach**: DORMAC and Sandock Austral Shipyards.

**C. Maritime skills, training and certification services**

- **SAIMI** (maritime skills development network; good referral hub).
- **SAMSA** (standards and regulatory alignment for training providers).
- **Armscor** (official procurement gateway on defence acquisition).

## 5) Marine Biotechnology

**A. Contract R&D, biodiscovery partnerships, lab services, pilot studies**

- **Rhodes University** – Institute for Coastal and Marine Research (ICMR) as a recognised coastal/marine research anchor.
- **Nelson Mandela University** – Ocean Sciences Campus (marine research partnerships and applied ocean capability).
- **CSIR** (applied research partner; also helpful for scale/pilot alignment).

**B. Innovation funding, incubation, commercialisation support (biotech/bioeconomy pathway)**

- **Technology Innovation Agency (TIA)** (public innovation funder with bioeconomy relevance; good for pipeline and partner referrals).
- **SARIMA** (technology transfer / research commercialisation network; helps locate university TTOs and licensing partners).

**C. Regulatory navigation for bioprospecting and access/benefit-sharing (ABS)**

- **DFFE** (bioprospecting/ABS permitting and compliance entry point).

# Practical BUY-FROM-SA Guide

## 6) Coastal & Marine Tourism

**A. Eco-certification implementation services (Blue Flag / Green Key readiness, audits, compliance support)**

- **WESSA Blue Flag programme contacts** (standards, sites, implementation guidance and local partners).
- **Cape Town Tourism membership directory** (useful for identifying accredited local operators/suppliers).

**B. Destination infrastructure services (small harbours/marinas, visitor facilities, MPA-adjacent services)**

- **SANParks concessions/business opportunities** (where concessioning and service contracting applies around protected areas).
- **TNPA** (for marina/port-adjacent interface points and service ecosystem).

**C. Ocean safety and operational services (guiding, rescue readiness, safety planning)**

- **SAMSA** for baseline maritime safety expectations and regulatory alignment.
- **SATSA directory** to identify professional tour operators and DMCs with established safety systems.

**D. Visitor services & experience delivery (DMCs, operators, thematic experiences, event-linked tourism)**

- **SATSA member directory** (primary national discovery tool for vetted tourism operators).
- **South African Tourism (trade/industry entry point)** for broader market routing and sector contacts.

**E. Blue gastronomy sourcing and traceability “add-ons” for tourism routes**

- WWF-SASSI for sustainable seafood sourcing guidance and supplier screening.
- ABALOBI (where relevant) for connecting small-scale fisheries value chains to markets with traceability tools.

## Practical Contracting Recommendations

- **Ask suppliers for**: export track record, quality certifications (where relevant), HSE practices, references in KZN/SA ports/coastal nodes, and (if public-sector adjacent) evidence of registration on the relevant portals.
- **Use associations first, then triangulate**: start with bodies like **SAASOA** / **SAASR** / **AASA** / **SADSTIA** / **SAPFIA** / **SATSA**, then validate through regulator context (**SAMSA**, **DFFE**, **TNPA**) and independent sustainability frameworks (e.g., **WWF-SASSI**).
- **State-linked contracting**: insist suppliers demonstrate registration and track record via Transnet tender systems.

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