DRAFT BACK OF PORT INTERFACE (BOP) LOCAL AREA PLAN (LAP)

Presentation to ECOD
Thursday, 7\textsuperscript{th} June 2012
Presentation Overview

1. Project Background: TORs, Study Team, Project Steering Committee, Study Phasing
2. Macro-scale Strategic Setting
3. Status Quo Analysis & Constraints
4. Back of Port Plan – Concept and Precinct Plans
5. Public Participation
6. Zoning Recommendations and Phasing
7. Implementation Framework
8. Committee Recommendations
9. Questions and Responses
RECOMMENDATIONS AS APPROVED BY ECOD ON 23rd NOVEMBER 2006:

1. THAT, the Committee supports the strategic review of zoning and land use within the study area;

2. THAT, the Team be mandated to consult with Interested and Affected Parties in order to arrive at the most appropriate effective and optimal zoning/land use options for the study area;

3. THAT, subject to approval of (1) and (2) above, it is requested that committee recommend authority for resources to be allocated to meet the objectives as indicated in (1) and (2) above. “
Study Area
### STUDY PROJECT CONSORTIUM

<table>
<thead>
<tr>
<th>Name of Firm</th>
<th>Responsibility</th>
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<tr>
<td>Graham Muller Associates</td>
<td>Project management, economic research and town planning</td>
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<td>Iyer Urban Design Studio</td>
<td>Town planning and urban design</td>
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<tr>
<td>Arup</td>
<td>Transport and bulk infrastructure planning</td>
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<td>UKZN (Di Scott &amp; Cathy Sutherland)</td>
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### STUDY PROJECT STEERING COMMITTEE

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**Images:**
- Ethekwini Municipality
- Iyer Design Studio
- Graham Muller Associates
Macro-scale Strategic Setting
Super Port Status

• Expand Richards Bay – More Coal
• Port of Durban: Focus on Containerised Cargoes
• New Specialised Port at DIA site:
  • Bulk Liquid Cargos to serve:
    – Island View*
    – Refineries*
    – Pipelines (refined product)*
  • Car Terminal to serve:
    – Toyota*
    – New OEM manufacturer
    – Other motor vehicle importers & exporters*
  *Move from Durban to make room for more containers
• Other Specialised Cargoes to Coega
Phase 1: Current Projects

- DCT: 2.9m
- PIER 1: 0.7m
- PIER 1 PHASE 2: 0.7m
- MAYDON WHARF: 0.6m
- DURBAN TOTAL: 3.6m TEU
Phase 2a: Reunion (Airport) Site - 2019

Phase 1 Container Terminal
Phase 2b: Reunion (Airport) Site - 2050

- Phase 1 to 4 Container Terminals
- Liquid Bulk Terminal
- Vehicle Terminal

DCT: 2.9m
PIER 1: 0.7m
PIER1 Phase 2: 0.7m
MAYDON WHARF: 0.6m
AIRPORT DIG-OUT: 7.2m
TOTAL: 12.1m TEU
Conceptual View of the New Port at Reunion
Phase 3: Bayhead Expansion

DCT: 2.9m
PIER 1: 0.7m
PIER 1 Phase 2: 0.7m
MAYDON WHARF: 0.6m
AIRPORT DIG-OUT: 7.2m
BAYHEAD DIG-OUT: 6.0m
TOTAL: 18.1m TEU
Port of Durban & Reunion (Airport) Site Expansion
Durban Container Projects: Sensitivity of Ramp-up Dates

- **High Growth (10%)**
  - Airport Expansion in 2017
  - Bayhead Expansion in 2028

- **Medium Growth (8%)**
  - PIER 1Ph 2 in 2015
  - Airport Expansion in 2019
  - Bayhead Expansion in 2037

- **Low Growth (5%)**
  - PIER 1Ph 2 in 2015
  - Airport Expansion in 2024
# Build-up of TEU Capacity
(based on Transnet expansion plans for the Port of Durban – 2011 to 2050)

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<th>Years</th>
<th>Re-engineering / Expansion Phase</th>
<th>TEU Capacity Millions</th>
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<td>2037 - 2050</td>
<td>Bayhead Dig Out</td>
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<td>TOTAL TEUs / ha</td>
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<td>18.1</td>
<td>714 ha</td>
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Phase 1a: 2012-2017 from Port to N2 with new Interchange

Phase 1b: 2014-2020 North South freight route to Dig Out Port

Phase 1c: 2015-2020 East West freight route from Port to Mariannhill

Phase 2: 2019-2023 East West freight route from Port to Mariannhill

Proposed Dig Out Port

Legend
2012-2017: Implementation Phasing
Interchange
Freight Routes

Conceptual
Major Road Infrastructure Proposals for Port of Durban and Dig-Out Port
The Durban to Gauteng freight corridor forms the backbone of South Africa’s freight transportation network, and is vital in facilitating economic growth for the country and the Southern African region.

South Africa’s ability to improve efficiencies and lower logistics costs on the corridor, and to provide freight handling capacity ahead of demand, will be critical to the region achieving its short, medium and long term economic objectives.

The 2050 vision provides an integrated solution to the growing expansion requirements of the Durban to Gauteng freight corridor which will form the future foundation for the establishment of a Southern African regional freight network.

**ECONOMIC BENEFITS**
- R6 billion p.a increase in National GDP during construction
- R29 billion p.a increase in National GDP during operation
- Approx 62,000 new jobs created
- R4 billion p.a increase in Local GDP during construction
- R12.5 billion p.a increase in Local GDP during operation
- 5.7% reduction in local unemployment

**MAJOR PHASES OF DEVELOPMENT**
The 2050 vision is driven by three major phases of port development:
- **Phase 1**: 2010 - 2020 (current expansions in the Port of Durban)
- **Phase 2**: 2020 - 2040 (Airport site development)
- **Phase 3**: 2040 - 2050+ (Bayhead development)

The corresponding rail, road, intermodal hub and terminal and land-use projects also follow this phasing sequence.

**KEY DEVELOPMENTAL COMPONENTS**
- The Port of Durban
- The Durban-Gauteng Road Corridor
- The Durban-Gauteng Freight Rail Corridor
- Strategically located logistics hubs and terminals
- Supportive local area Land Use plans

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**ROAD RAIL AND PIPELINE PLANS**
- Dedicated mandatory freight route
- Rail capacity improvements on Kwazulu-Natal Rail Corridors
- New Multi Product Pipeline

**INTERMODAL AND LAND USE PLANS**
- Local Area Land Use Plans for logistics activities
- Congestion mitigation plans
- Rationalised land uses
- Upgrades to City Deep, Pretoria and Vaalcor terminals
- Potential mega terminal at Sentarand

**TAKING SOUTH AFRICAN FREIGHT AND TRADE FORWARD INTO THE FUTURE**

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Status Quo Analysis & Constraints
Cost of Transportation & Logistics in South Africa

Source: State of Logistics Survey for South Africa 2008, CSIR

Logistics Costs as % of GDP

South Africa 15.9%
Ireland 14.3
Denmark 12.9
Canada 12.0
Spain 11.5
Hong Kong 13.7
Japan 11.4
UK 10.6
USA 7.7%
India 6.2%
# A Global Comparison of the Performance of Logistics Chains

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<th>Time to export (days)</th>
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*Source: World Bank, Doing Business Index – Trading Across Borders*
Current Logistic Trends

- 60% - 75% of all containers shipped & landed at the Port of Durban do not leave eThekwini Municipality.
- However, 70% - 80% of all cargo landed in containers nonetheless does leave eThekwini Municipality.
- Of 1,320 logistics companies identified in eThekwini Municipality, 1,021 (77%) are trucking related.
- 60% of all trucking related logistics companies are located within 15km of DCT.
- 90% of all trucking related logistics companies are located within 30km of DCT.
- Westmead, Southgate and Riverhorse Valley are just within 30km from DCT.
Reasons for Logistics Companies’ Close Proximity to Port

• Ever changing berthing stack dates
• Slow truck turnaround times in the port causing congestion at the A-check or at the port entrance
• Limited and inefficient rail service.
• The truck dependant logistics industry is highly sensitive to the fuel price & therefore looks to minimise truck distances travelled.
• Imbalance between 6 metre & 12 metre containers and seasonality of freight movement leads to large numbers of empty containers being trucked around the metro & imported & exported from the Port of Durban.
  – The transport leg between port and empty container depots is paid for by shipping lines, therefore shorter distances are favoured.
Back of Ports Constraints

- BoP comprises mostly outdated road infrastructure which needs to be upgraded to handle freight growth in the municipality;
- Port entrance & road congestion have a negative knock on effect on the entire logistics chain;
- Under-utilisation of rail has lead to increasing levels of trucking in the logistics chain, therefore:
  - Importers/exporters are increasingly vulnerable to oil price shocks
  - Road maintenance in eThekwini Municipality increases
  - Road safety is put at risk
  - Air pollution increases (particularly in the SDB)
- Warehousing is outdated & inefficient but high property values inhibit re-development
- The Clairwood community is sensitive to changes - however, large portions of Clairwood are being utilised illegally for business & logistics purposes, even though zoned residential.
- Employment & GDP contributions (and property values) **per hectare** in Jacobs are among the highest in eThekwini Municipality
- The Clairwood Racecourse is environmentally sensitive & only a limited portion is available for re-development
## Economic value within the Study Area

### SPATIO-ECONOMIC INDICATORS

<table>
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<tr>
<th>SUB-AREA</th>
<th>Value added GDP per hectare (Rands million)</th>
<th>Employees per hectare</th>
<th>Average land value (R/sq.m)</th>
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<tr>
<td>Mobeni</td>
<td>9.70</td>
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<td>1,084</td>
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### SUB-AREA TOTALS

<table>
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<tr>
<th>SUB-AREA</th>
<th>Total value added GDP (Rands billion)</th>
<th>%</th>
<th>Estimated employment</th>
<th>%</th>
<th>Estimated value of real estate - economically productive land (Rands billion)</th>
<th>%</th>
<th>Total area of economically productive land (ha)</th>
<th>%</th>
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<tr>
<td>Congella</td>
<td>3.41</td>
<td>14.92%</td>
<td>7261</td>
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<td>14.03%</td>
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<td>10353</td>
<td>21.77%</td>
<td>1.39</td>
<td>17.24%</td>
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<td>Jacobs</td>
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<td>40.32%</td>
<td>19240</td>
<td>40.45%</td>
<td>2.02</td>
<td>24.99%</td>
<td>131</td>
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<tr>
<td>Mobeni</td>
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<td>9.13%</td>
<td>4039</td>
<td>8.49%</td>
<td>2.33</td>
<td>28.86%</td>
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<td>30.56%</td>
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<td>TOTAL</td>
<td>22.85</td>
<td>100%</td>
<td>47,564</td>
<td>100%</td>
<td>8.07</td>
<td>100%</td>
<td>703</td>
<td>100%</td>
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</table>

Note: Clairwood includes residential component
Existing Land Use – Clairwood

- Business / Logistics / Manufacturing
- Open Spaces / Vacant Land
- Cemeteries
- Municipal Land
- Permitted Business Activity
- Mosques, Temples & Churches
- Listed Buildings
- Converted Listed Buildings
Environmental Considerations

← Amanzinyama Canal Rehabilitation

Clairwood Racecourse Wetland and Grassland Conservation →

Umhlatuzana River Valley Rehabilitation ↓
Back of Port Plan – Concept and Precinct Plans
Recommendation:
eThekwini Municipality’s logistics strategy should be framed in three phases:

- **Phase 1**: Develop and enhance the back of port logistics platform with improved linkages between Bayhead, Reunion (DIA), N2, M4 (South Coast Freeway) and M7;
- **Phase 2**: Develop and unlock land to support the logistics sector as the proposed new dedicated truck road is built along the east-west logistics platform (up to Westmead);
- **Phase 3**: Create a decentralized logistics hub as and when land close to the port and on the east-west corridor is no longer available at economic prices.
Zoning of back of port facilities:

ZONE 1
- Container terminals
- Break bulk terminals
- Liquid bulk terminals

ZONE 2
- Maintenance area
- Workshops
- Staff facilities
- Export buffers* for:
  - Break bulk
  - Motor vehicles
  - Containers: Full, Empties

ZONE 2
- Intelligent truck staging
- A-check

ZONE 2
- Rail export buffer stacks for:
  - Containers
  - Motor vehicles

ZONE 3
- 3rd party parking/unpacking
- Empty container depots
- Intermodal logistics area for import/export buffers for pipelines
- Export buffers for break bulk cargo
- Export buffers for motor vehicles
- Shipment buffers for coastwise petroleum

* Can be located in zone 3 if space is limited

N.B. This sketch does not indicate land ownership - the location of BoP activities is independent of whomsoever owns the land.
OVERALL BoP CONCEPT PLAN

RATIONALISE THE LAND USE STRUCTURE

It is envisaged that a revised land use system is established aligned with the revised spatial structure.

A series of land use changes and refinements are required to rationalise the existing structure.

The revised system includes a layering of land use types in terms of impact between the business and residential systems. This includes establishing a series of interface zones.

A key requirement of the revised land use system is to include the incorporation of specific zones to address the contemporary needs of business within the study area and to acknowledge the substantial shifts and demands for new uses within the study area such as the growth of logistics related activities.
Existing Situation - Roads
Phase 1a of Road Upgrade
Phase 2 of Road Upgrade
Phases 1-2 of Roads (with all residential lower priority routes also shown)

Note:
All major road developments in Phase 3 – Bayhead Dig-out are internal port roads
Open Space Structure

**Open Space Structure**
- Coastal Corridor & Dune System
- River Corridor & Canal System
- Conservation/Passive Recreation
- Active Recreation
- Corridor Planting Strategy
- Places of Significance
- Cemetery
- Waterway System

**Movement & Circulation Structure**
- N2 Highway
- M4 Highway
- Existing Roads
- Phase 1 Roads: Link to the Existing Harbour and N2
- Proposed Internal Port Route
- Phase 2 Roads: Link from Existing Harbour to M7 and N2
- Phase 3 Roads: Link to the New Harbour
- Mixed Traffic Road
- Residential Roads
Land Use Structure
Public Participation

- 60 days stakeholder engagement process
- 7 Public Meetings
- 5 Focus Group Meetings
- Access to documentation and notification: Local Libraries and Local Regional Centre; Posters and Flyers; Metro News Paper
- Comments and Inputs:
- Toll Free Number and Comment Boxes and Emails
- Facilitated by: Independent Facilitator and Logistics and Communications Service Provider
Zoning Recommendations
Congella: Land use to remain virtually unchanged.

Umbilo / Rossburgh: Noxious Industry & General Industry maintained east of Sydney Road - opportunities for redevelopment at Edwin Swales VC Drive, Umbilo Road re-aligned to accommodate the dedicated truck road link to the N2.
Clairwood: Clairwood central residential core recommended to be rezoned from special residential to logistics. The redevelopment of Fresh Produce Market and the Transnet Diesel Depot is recommended as the site of the initial logistics platform.
CLAIRWOOD

• Dedicated truck road impacts on Clairwood
• Current business activity illegal and legal
• Current economic viability of land in Clairwood
• Current zoning of special residential is non-effective, & total loss of amenity in the area
• Much needed logistics space & Clairwood is the closest
• Noting the above and given consideration to social and heritage issues it is still pertinent for the city to consider rezoning logistics and give finality
Jacobs & Mobeni East: A gradation of zoning types: (a) noxious industry [along the M4], (b) general industry [from Chamberlain Road] & (c) light industry [between general industry and residential areas].

Clairwood Racecourse: Recommended rezoning to Office Park/Logistics related uses (including ASP) & a combination of passive and active land uses, as well as protecting the environmental spring area.
**Mobeni West:** Existing noxious and general industrial zones recommended to be transformed to a Logistics A zone permitting open storage.

**Merewent Industrial Area:** Proposed conversion to a Logistics B zone, prohibiting open storage for better interface with adjacent residential area. Controlled interface circumscribing a landscaping strip & office positioning prescribed on the eastern edge of the area to act as a buffer within the residential area.
Merewent: Existing industrial developments will continue in their present form & a new industrial area will be accessed through a direct link from the new dig-out port. The existing noxious & general industrial zones will be permitted to continue in their present format. The extension to the industrial area will require a buffer of offices between itself and the adjacent residential areas.
Establish a Dedicated Institutional Vehicle to Implement the Back of Port Zone Re-development:
This vehicle must have the necessary capacity to ensure the re-development of the Back of Port area and also it is recommended that the institutional vehicle makes provision for current property owners to invest their properties (optional).

Inter-Government Co-operation and Investment and Partnerships:
All three spheres of government (and government agencies and parstatals) jointly co-operate and invest in the study area through a MTEF and public-public and private partnerships.

Clairwood Stakeholders:
• The legal status and use of property owners will not be affected and the residential and legal business use of such property will continue for as long an owner would like to;
• Fair negotiated outcomes regarding property acquisition to be sought with individual land owners. All options of acquisition be considered and the best value to the property owner be the option of choice.
• Property owners be given the option to invest their property into a legal entity for the re-development of the area;
• The rates code status of current legal use of property to remain unchanged. A change in rates code should only take effect when the proposed rezoning and associated infrastructure is in place and the use of the land is in accordance with the proposed zoning (logistics)
Implementation Framework

Informal Housing:
Housing options and a housing plan for the current and recognised informal settlements should be expedited and treated as a special housing programme.

Clairwood Racecourse:
The development footprint and future use of Clairwood racecourse to be determined through the required Environmental Impact Assessment and Rezoning process.

Fresh Produce Bulk Market:
The relocation of the Fresh Produce Bulk market will have both economic and social implications and it is recommend that a suitable feasibility and identification of an alternative site is identified and prepared for a seamless transition.

Environmental Protection and Mitigation:
The clean up, greening and maintenance of the canal systems serving both as an environment and social asset are important environmental interventions required to balance support and balance the economic aspects and re-development of the area.

Changes in Town Planning Schemes for Current Industrial Zoning within the Study Area: an incremental approach recommended.

Back of Port Zone RE-development to be Coupled with Other Strategic Development Areas within ETThekwini and Beyond: BOP development must be coupled with new industrial development.
Committee Recommendations

- Provide in-principle support for the Draft Back of Port Interface Local Area Plan;
- Support the release of the Draft Back of Port Interface Local Area Plan for public comment for an approximate period of 60 days;
- Support & approve the proposed Public Participation Plan & process for engaging communities, business & key stakeholders in gaining valued input to further refine and finalize the BOP LAP;
- Support that the final BOP LAP be submitted to Committee for further consideration.
End of Presentation

Thank You!
Questions and Responses