

# intermodal AFRICA<sup>2025</sup>



**Building Strong Geographical Networks Through Cross Border Trade**

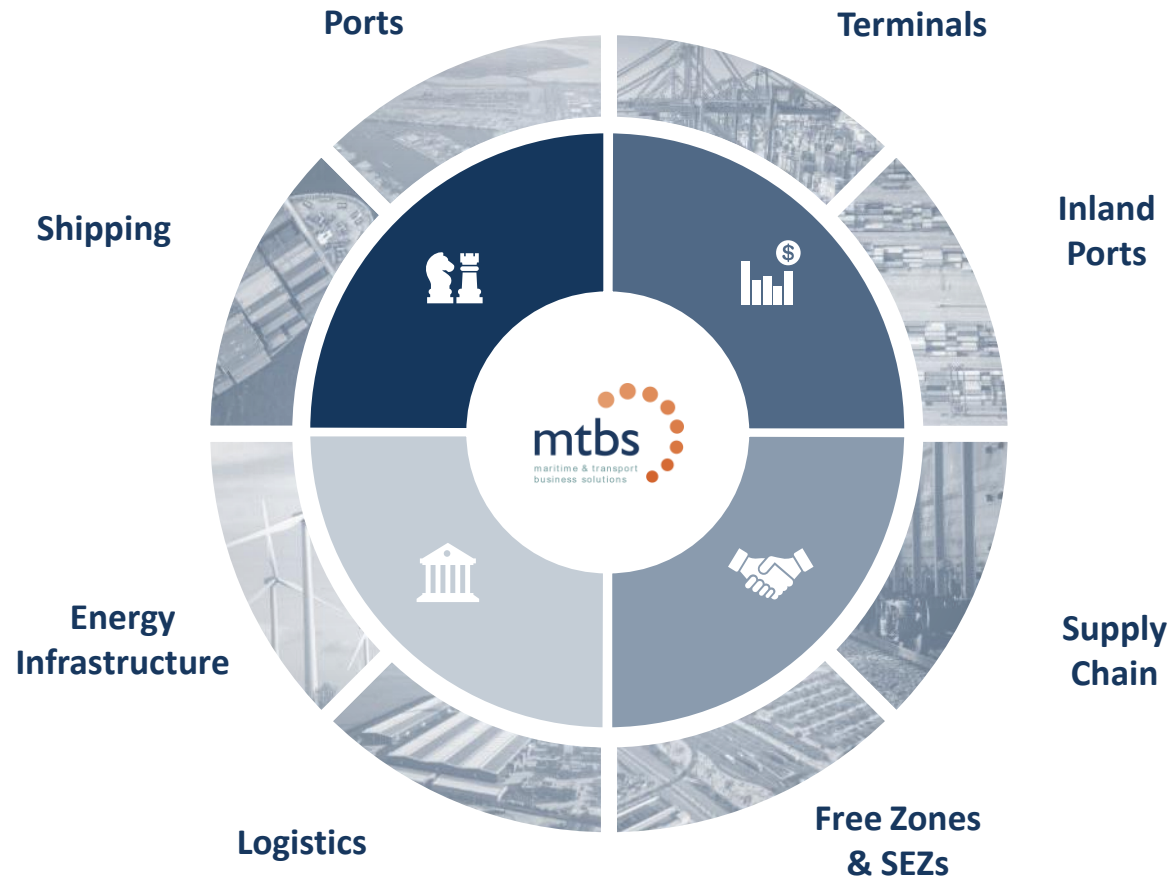
**CAPACITY AND INVESTMENTS IN SOUTHERN AFRICAN PORTS AND CORRIDORS**

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## WHO WE ARE ? OUR SERVICE OFFERINGS

MTBS is your trusted partner for port strategy and transactions, specialising in PPPs, M&A and supporting strategic investment decision-making across the port industry



	<b>Strategy</b> Our presence in major ports' boardrooms enables us to advise clients on commercial strategies, go-to-market plans, expansion initiatives, port policies, masterplans, energy transition, organisational reforms, investment/divestment planning and a wide range of other strategic opportunities
	<b>Valuation</b> Our deep expertise allows us to efficiently execute any port-centric valuation projects through structuring the optimal value of an investment, bankability assessments, feasibility studies, business cases & demand forecasts and financial modelling
	<b>Transaction</b> With our long-standing global experience, we support our clients across various areas of end-to-end transaction advisory, including PPP structuring, transaction management, private M&A, negotiations, and contract drafting
	<b>Finance</b> Our strong network and sector specialisation enable us to successfully support clients in project finance, financial structuring, investment and divestment, due diligence, and the procurement of finance

# MARKET OVERVIEW – INTRODUCTION TO MOZAMBIQUE

Mozambique is one of the poorer countries in the SADC, with a fast-growing population which still largely relies on subsistence farming.

## Key Economic Indicators:

- Mozambique’s estimated GDP in 2024 is USD 20.1 billion.
- Real GDP growth is around 5.0%, driven by mining, construction, logistics, and energy.
- Major exports include coal, graphite, cashew, sugar, cotton, and liquefied natural gas (LNG).

## Ports & Maritime Network, Main Ports:

- Maputo (South): Container, bulk, and liquid terminal; key for South African trade
- **Beira (Central): Hub for Zimbabwe, Zambia, and Malawi**
- Nacala (North): Deepwater port with rail to Moatize mines and Malawi

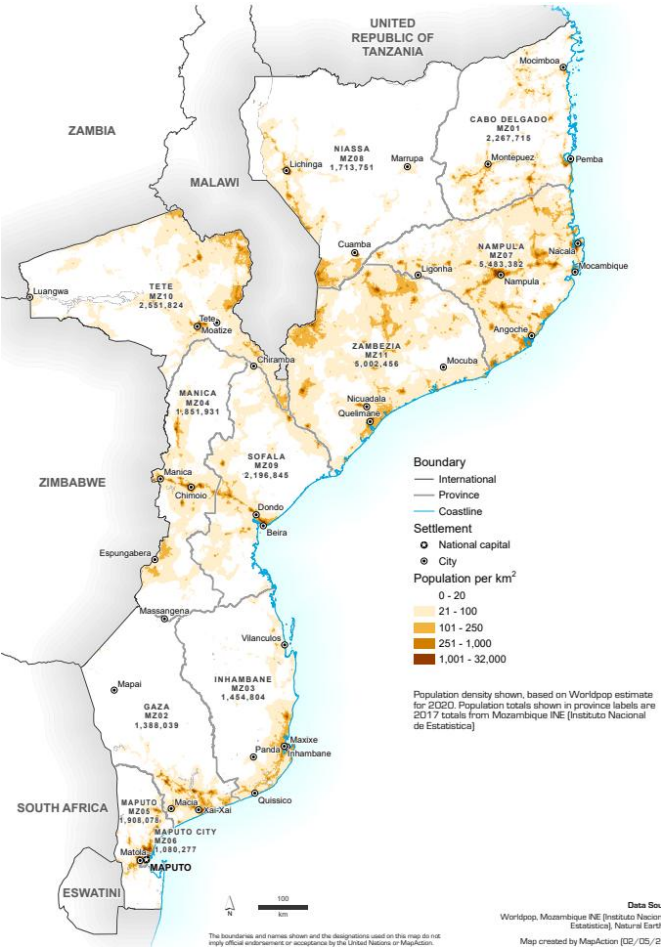
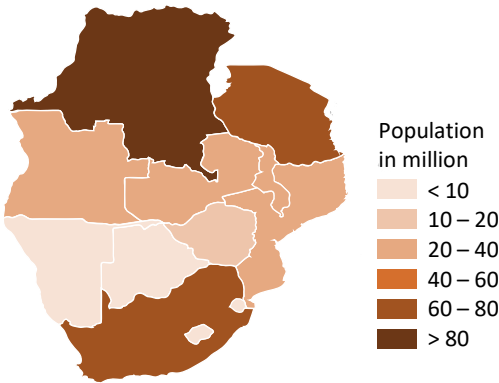
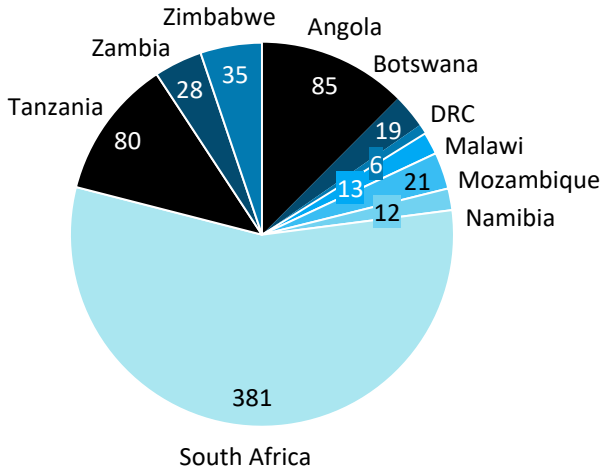
## Corridor Connectivity:

- The Maputo Corridor links Mozambique to Gauteng province in South Africa.
- **The Beira Corridor connects to Zimbabwe via the Machipanda line and to Zambia and Malawi via the Sena line.**
- The Nacala Corridor runs by rail and road to Tete, Malawi, and Chipata in Zambia, supporting coal and agri-bulk exports.

## Port Throughput (2023/2024):

- Beira: ~25 million tons, 350k TEU
- Maputo/Matola: ~37 million tons, 255k TEU
- Nacala: ~3 million tons, 100k TEU

GDP Contribution per Country and Population  
Billion USD



Sources: World Bank Group, IMF, Le Monde



## MARKET OVERVIEW – MOZAMBIQUE'S PORT SECTOR & RELEVANT HINTERLAND

Mozambique has three major ports facilitating the hinterland in the north, middle and south, each connected to various landlocked countries by road and rail.

### Port of Maputo (South):

- Mozambique's most developed and prioritised port, aligned with South Africa's trade.
- Key export-import hub for southern Mozambique, linked to Gauteng via the Maputo Corridor.
- Well connected to the North-South Corridor and major ports in South Africa.
- **US\$165 million DP World-led expansion of the container terminal.**
- **Up to US\$2 billion overall expansion project by MPDC, including dredging and 16 m depth.**

### Port of Beira (Central):

- Strategically serves Zimbabwe, Zambia, and Malawi.
- Strong in grain and fertiliser imports; growing competition with Nacala.
- Connected via the Machipanda rail (to Zimbabwe) and Sena line (to Malawi/Zambia).
- **US\$290 m government-backed upgrade, including dredging and rail rehabilitation.**
- **Cornelder de Moçambique is doubling its container terminal to 700k TEU and building a 150,000 t bulk minerals terminal.**

### Port of Nacala (North):

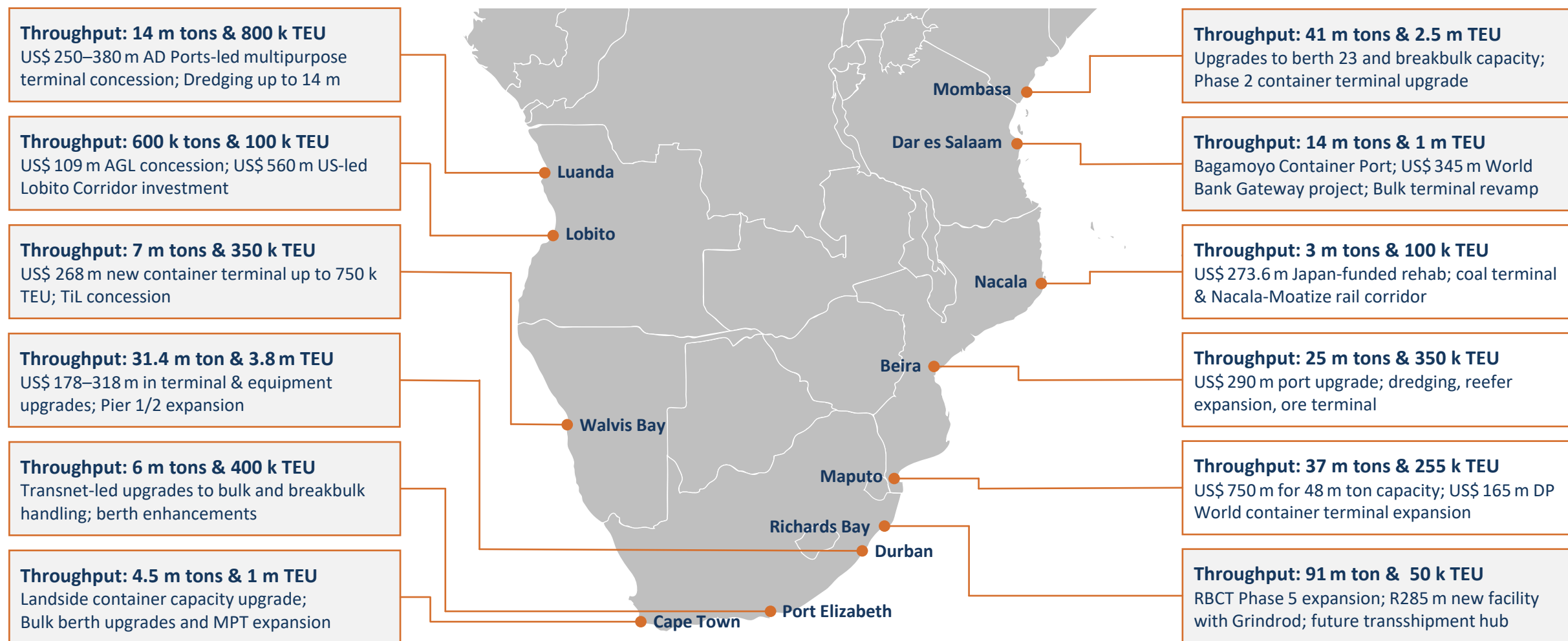
- Deepest natural port on the East African coast, serving northern Mozambique, Malawi, and Zambia.
- Less developed but high potential due to depth and location.
- Linked by modern rail (CLN) to Malawi and Zambia; currently focused on coal exports.
- **US\$273.6 million Japan-funded rehabilitation of the Nacala-a-Velha coal terminal and deepwater port.**
- Privatised terminal operators (e.g. Nacala Logistics, Vulcan) are investing in multipurpose berths and expanded coal export capacity.



Sources: Logistics Cluster LCA (figure), African Development Bank, CFM

## REGIONAL PORTS – CAPACITY AND INVESTMENTS

Major ports across Southern and Eastern Africa are scaling up capacity to meet rising demand and enhance regional trade connectivity.



## REGIONAL CORRIDORS – INVESTMENTS AND NEW DEVELOPMENT PLANS

Corridor upgrades across Southern Africa aim to expand capacity, boost connectivity, and reduce trade costs.

### Lobito Corridor:

- Angola–Zambia–DRC
- US\$4 billion total investment (including recent US\$600 million from USA);
- Aims for first coast-to-coast rail in Africa.
- Africa Finance Corp committing US\$320 million with Italy to continue funding this corridor.

### Mmamabula–Lephalale:

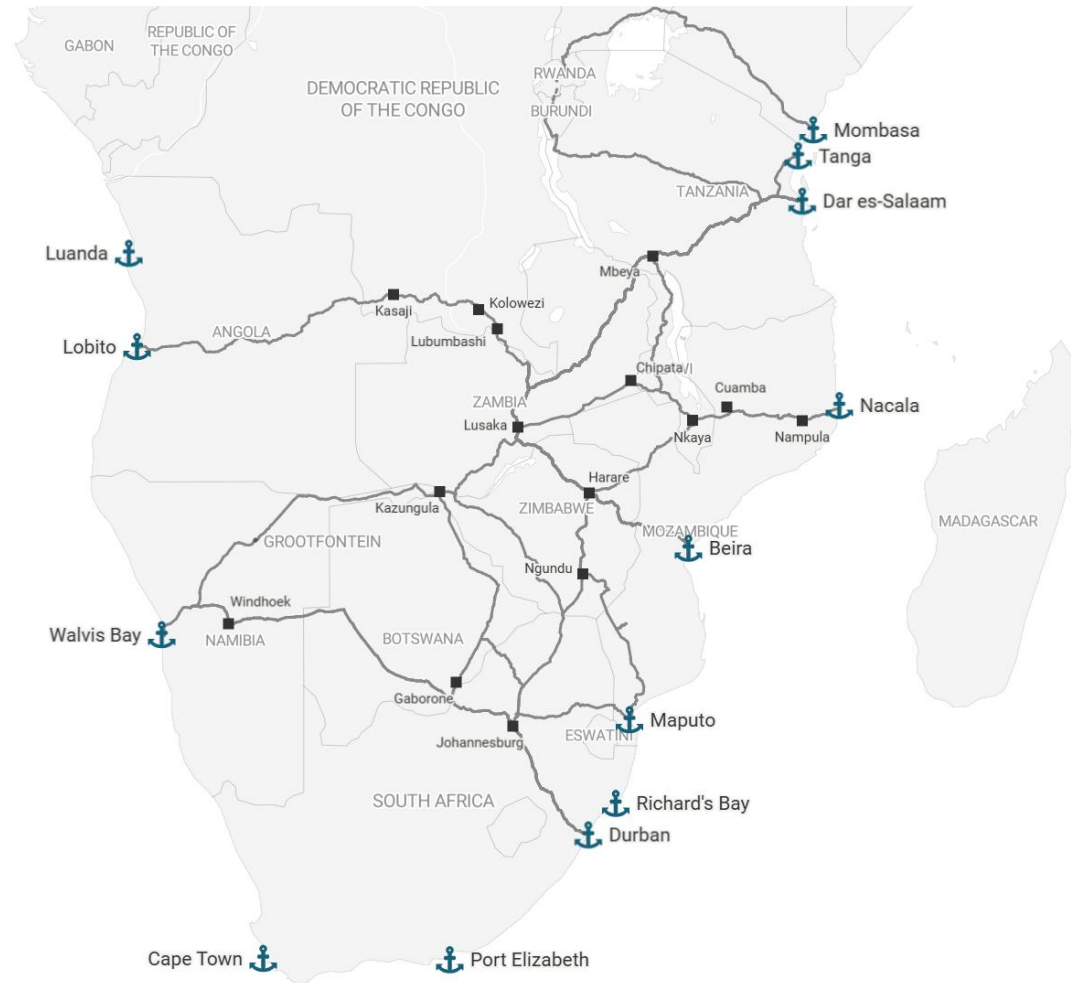
- Botswana–SA
- Proposed heavy coal rail link with capability up to 24 Mt/year
- Still in planning & feasibility
- Key export route to Richards Bay.

### Trans-Kalahari Railway:

- Namibia–Botswana
- Planned rail from Walvis Bay to Gaborone (~1,500 km).
- Part of broader corridor to relieve Eastern routes.

### Ponta Techobanine Railway:

- Botswana–Zimbabwe–Mozambique
- US\$6.5 billion planned 1,700 km corridor
- Access to new deepwater port facility in Mozambique south of Maputo.



### Beira Corridor:

- Mozambique–Zimbabwe–Zambia
- US\$200 million Machipanda rail rehabilitation
- Increases capacity from 0.4 m t to 3 m t/year.

### Maputo Development Corridor:

- SA ↔ Mozambique
- Connects Gauteng/Limpopo/Mpumalanga to Maputo via roads & rail.
- Over US\$5 billion invested since 1994, includes rail upgrades and border facilities.

### Mtwara Development Corridor:

- Tanzania–Mozambique–Malawi–Zambia
- 800 km of road and planned rail to connect Mtwara port with inland regions.
- Early-stage integration with Lake Nyasa terminals.

### Dar-es-Salaam Corridor:

- Tanzania–Zambia
- US\$270 million World Bank-funded TRACER project to boost climate resilience and connectivity
- Will enhance SMART corridor efficiency.

## MARKET TRENDS – BOOSTING INTRA-AFRICAN AND CONTINENTAL TRADE

Major trends in the African market, in production and in trade, boosts the local economies and are the source for an increase of future trade, transport needs and investments.

### Critical Minerals Boom: Copper, Cobalt & Beyond

- DRC and Zambia supply a major share of global copper and over 60% of cobalt, essential for EV batteries.
- China remains the largest consumer and investor, while Europe and the U.S. are increasing engagement.
- New investments target lithium and nickel (Zimbabwe, Botswana), aiming to expand local refining and battery value chains.
- The region is evolving from raw material exporter to a strategic EV supply hub.



### Global Partnerships and Investment Shifts

- China remains Africa's largest trade partner and financier, building ports, rail, and mining projects across the region.
- New U.S. and EU-backed initiatives (e.g. Lobito Corridor) are improving access to Western markets and driving infrastructure investment.
- U.S.–Africa trade (AGOA) and the EU's Global Gateway are increasing African exports of minerals, food, and apparel.
- Gulf, Indian, and Asian investors are expanding African trade links via new terminals, SEZs, and cross-continental logistics.



### Regional Trade Integration & Market Reforms

- AfCFTA is opening Africa's borders, enabling duty-free trade across 54 countries and growing industrial supply chains.
- Countries like South Africa exported \$29.6 bn to Africa; early pilots show tariff-free trade expanding across the continent.
- Reforms like one-stop borders and digital customs are streamlining logistics, cutting transport times and non-tariff barriers.
- Growing regional value chains (e.g. Zambian copper + South African manufacturing) are moving trade beyond raw exports.



### Rise of Agriculture and Agribusiness in Trade

- Agriculture is Africa's largest employer and fastest-growing trade sector.
- Export growth in high-value crops (avocados, macadamia, citrus, tea, sugar).
- Investments in agro-processing, storage, and export logistics are rising.
- Expanding trade with Europe, the Middle East, and China boosts value chains.





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