

Future outlook of African maritime sector:

Prepare for lift off?

Fisher Associates

12th Intermodal Africa

Durban, 2014

structure

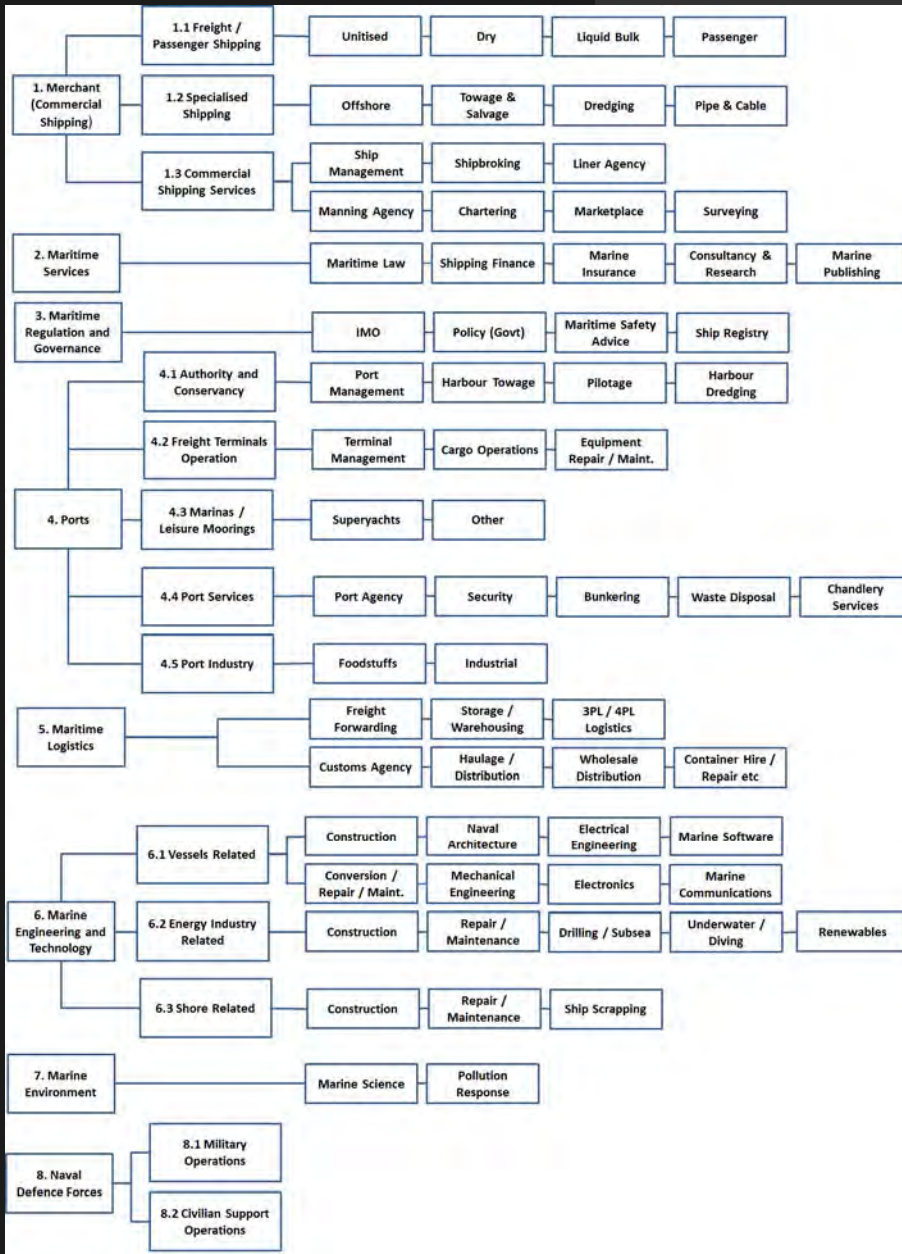
what is the "maritime sector"?

what drives it?

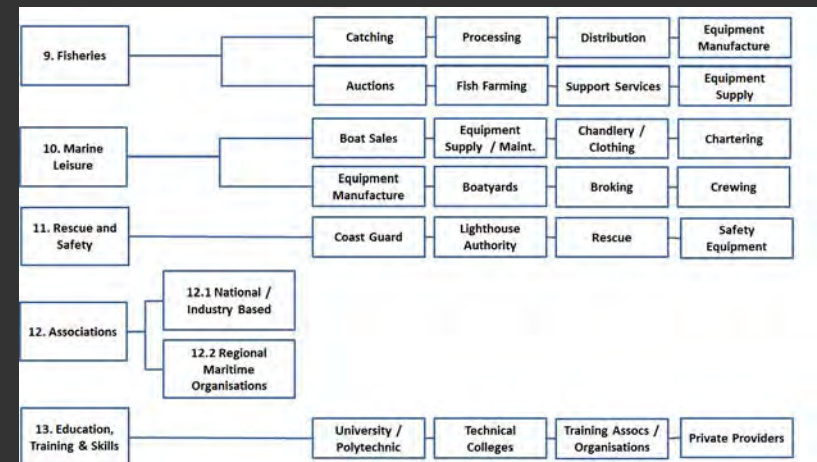
how to measure and better prepare?

maritime sector





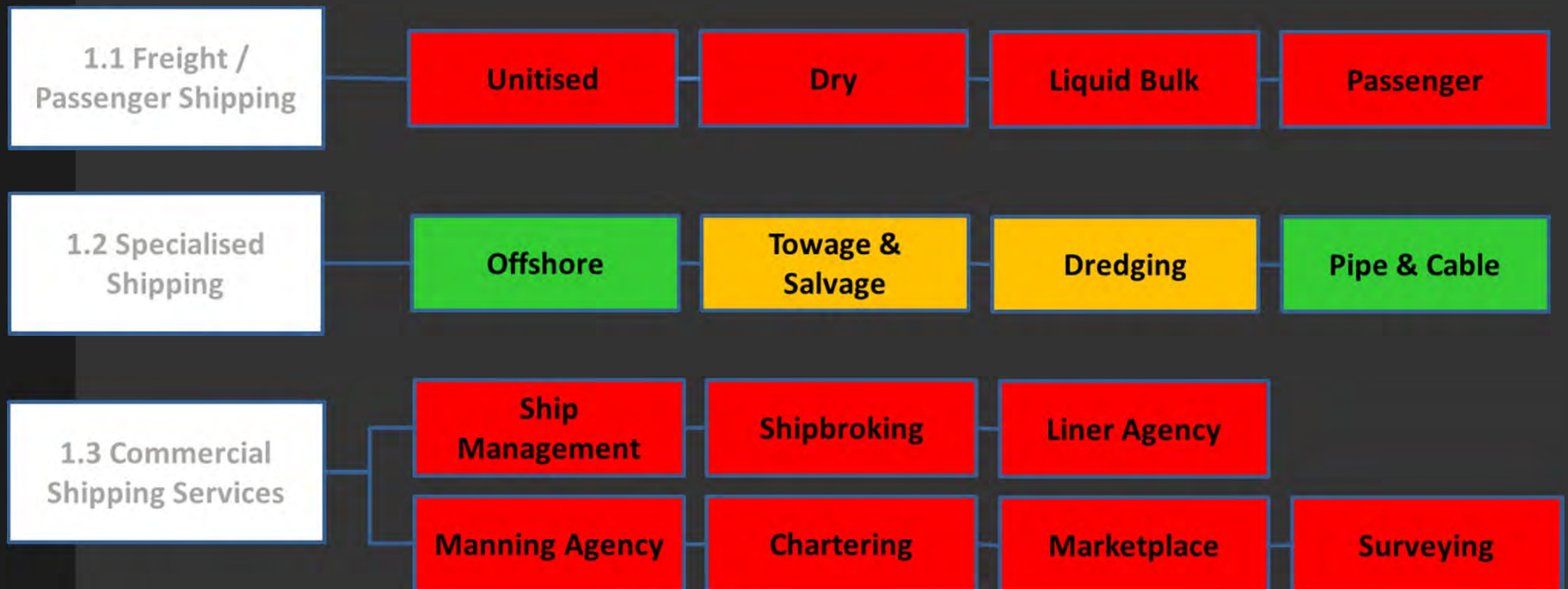
- “Fisher maritime industry model ©” comprises:
 - 13 sectors
 - 15 sub-sectors
 - 87 separate activities



what do you do with it?

use it to assess
competitiveness and
potential

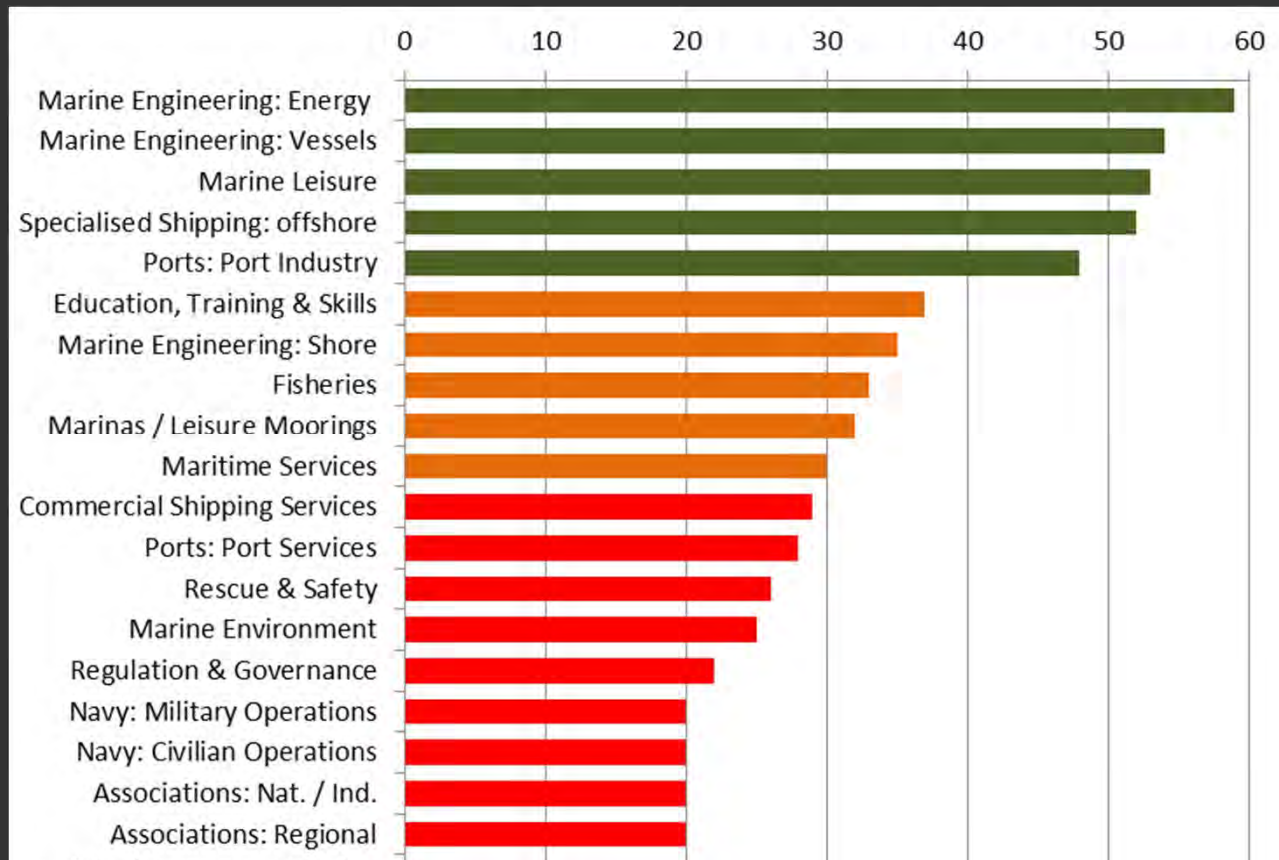
e.g. merchant shipping



e.g. marine leisure



gain an overall picture

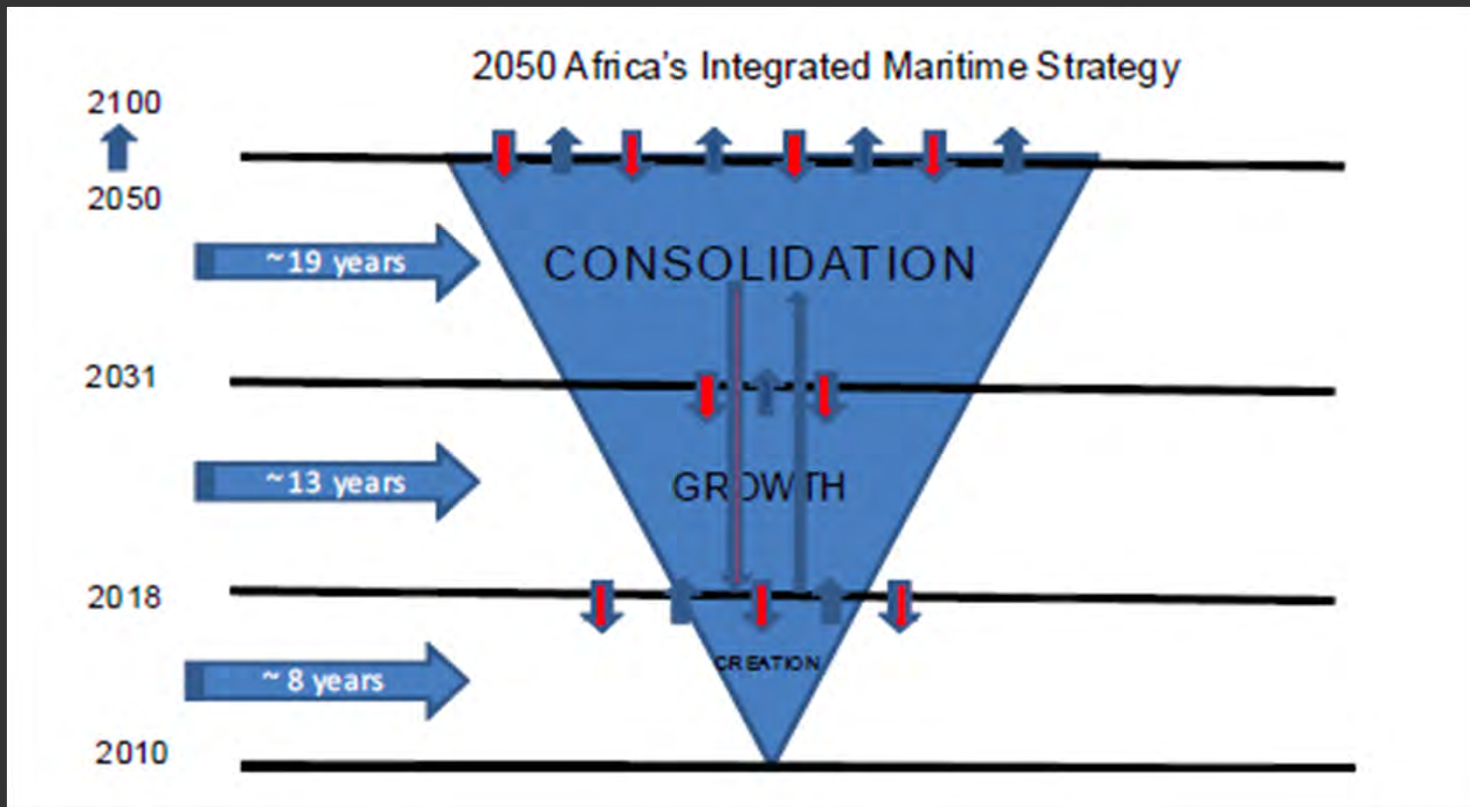




assess by:

- project
- country
- region
- continent

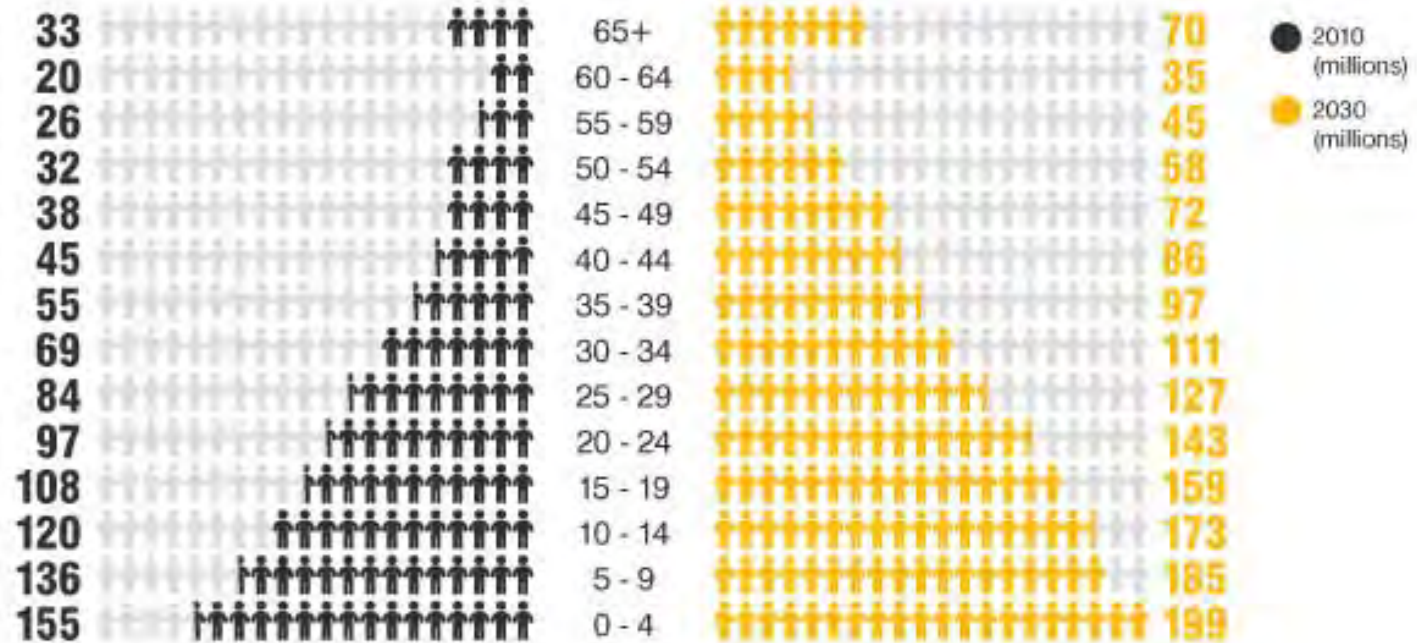
is anyone thinking about this?



future outlook for maritime in Africa

- population
- wealth per capita
- innovation
- external trade

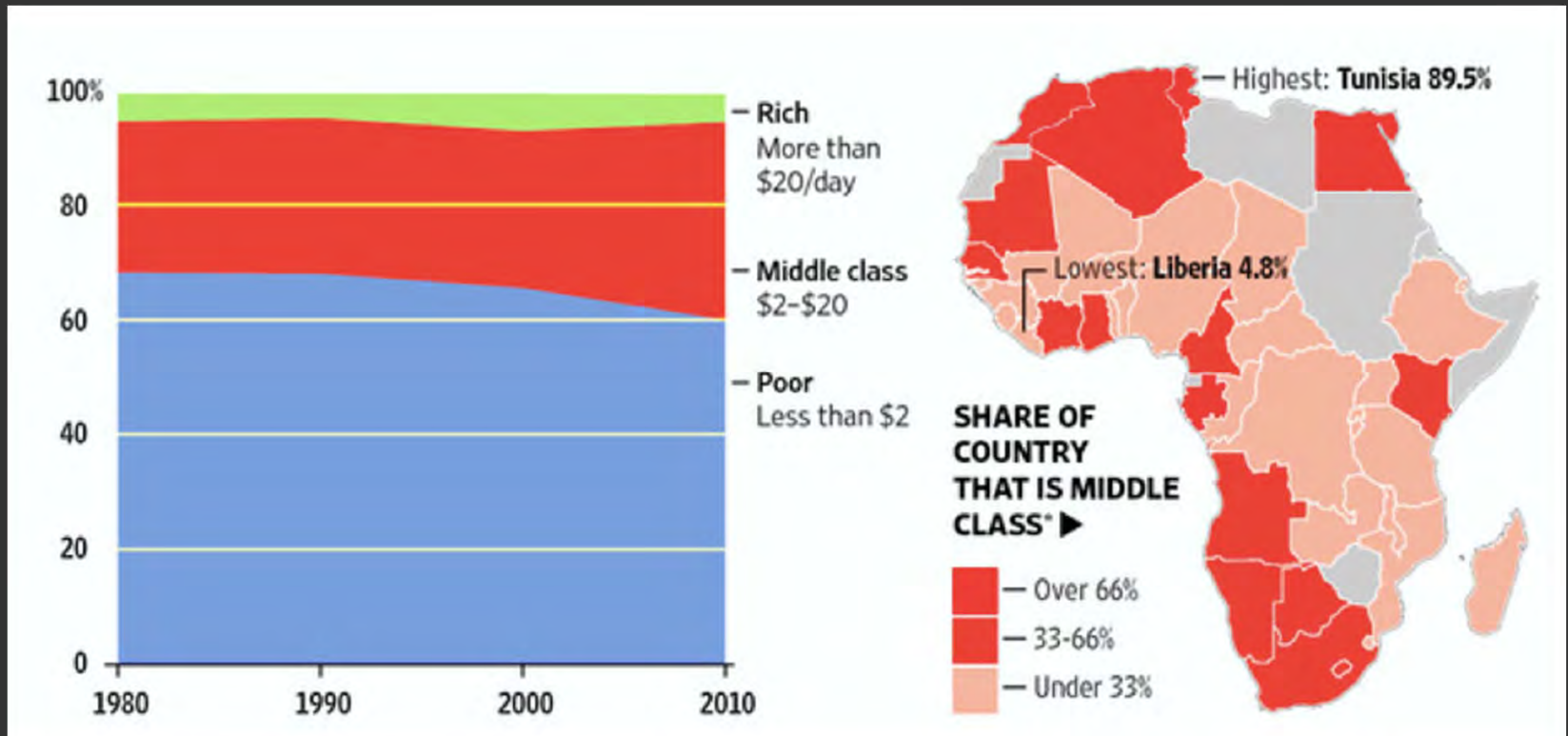
population



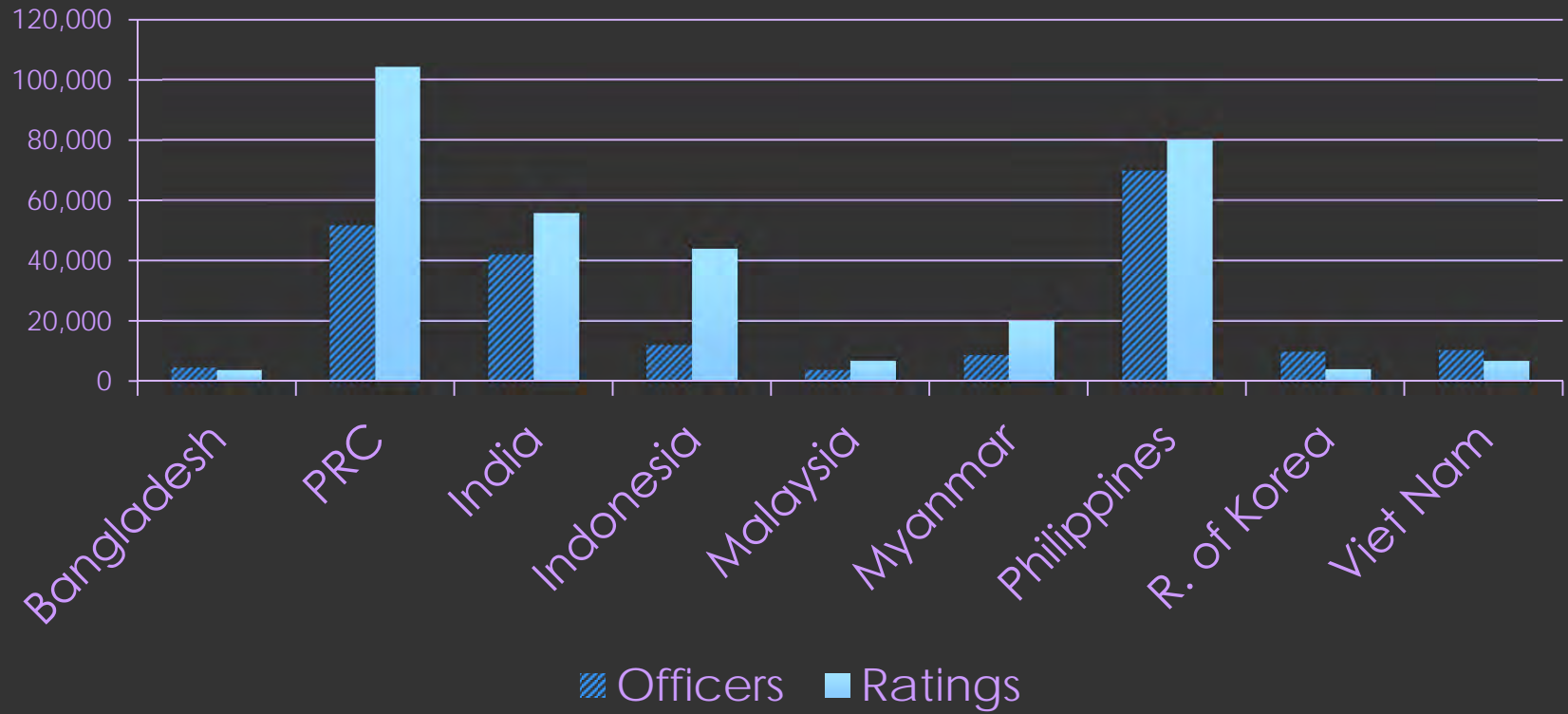
SOURCE: African Development Bank Group

wealth per capita

“by 2020 more than half of African households will have discretionary spending power”



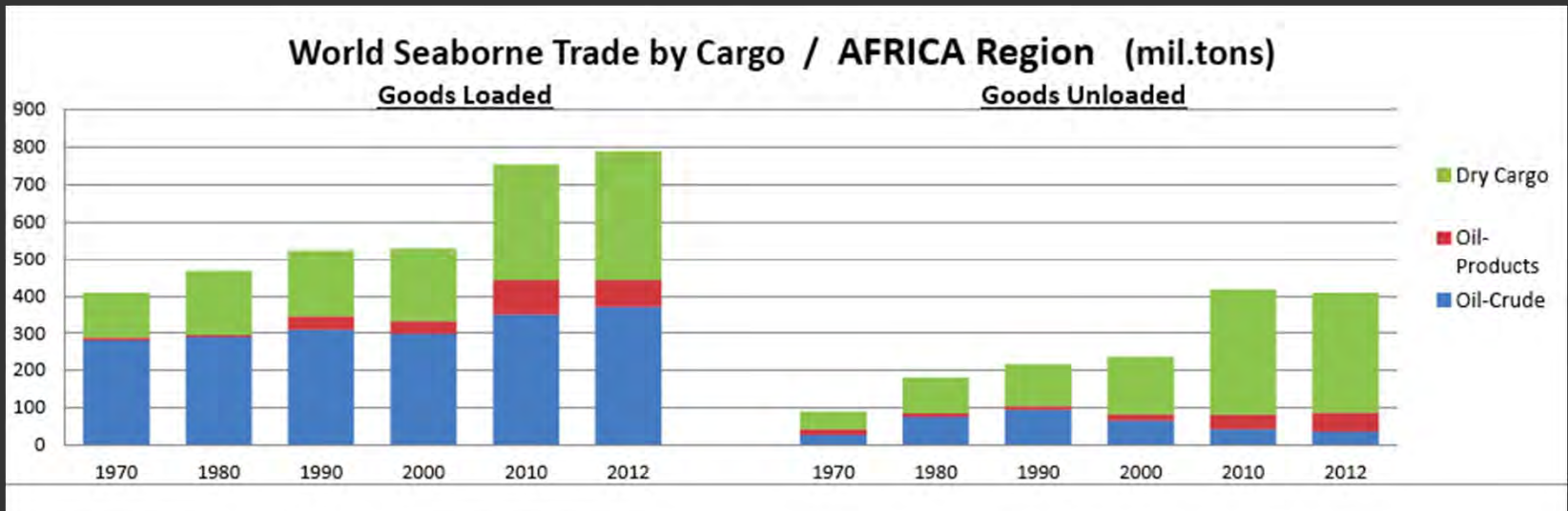
innovation e.g. supply of seafarers



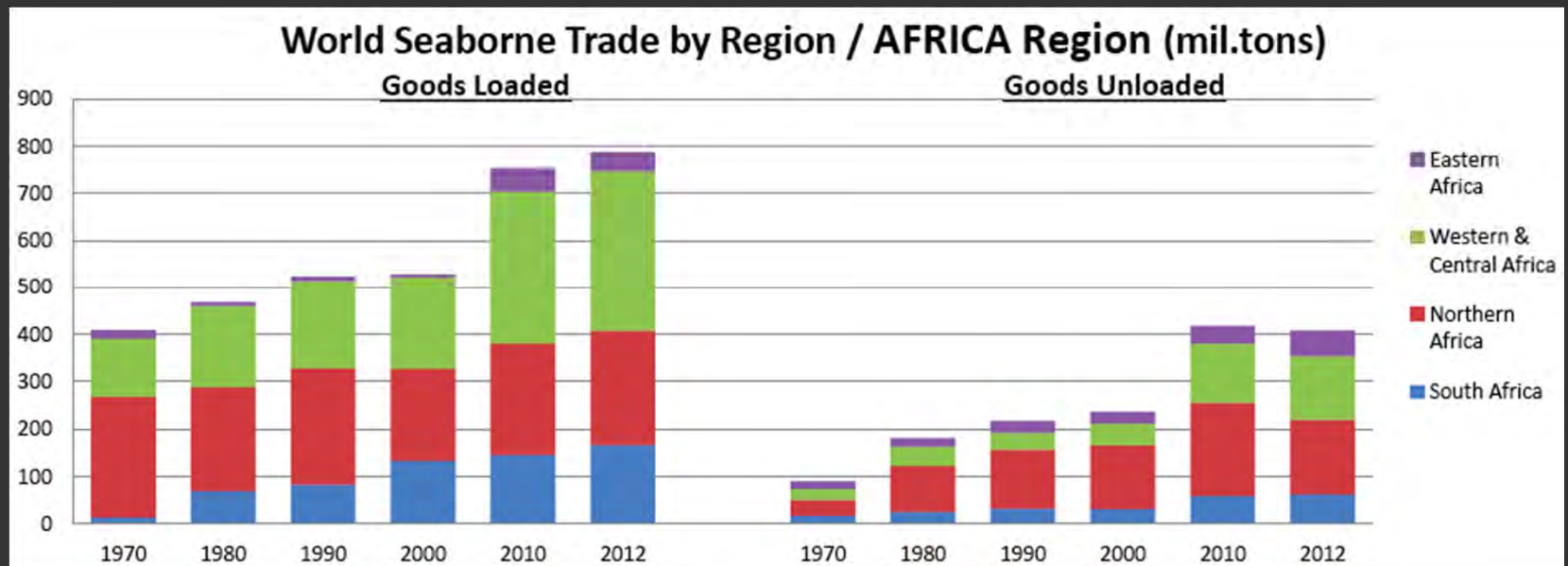
external trade

- external trade needs ships
- ships need ports
- commercial and support services task these
- regulation oils the cogs

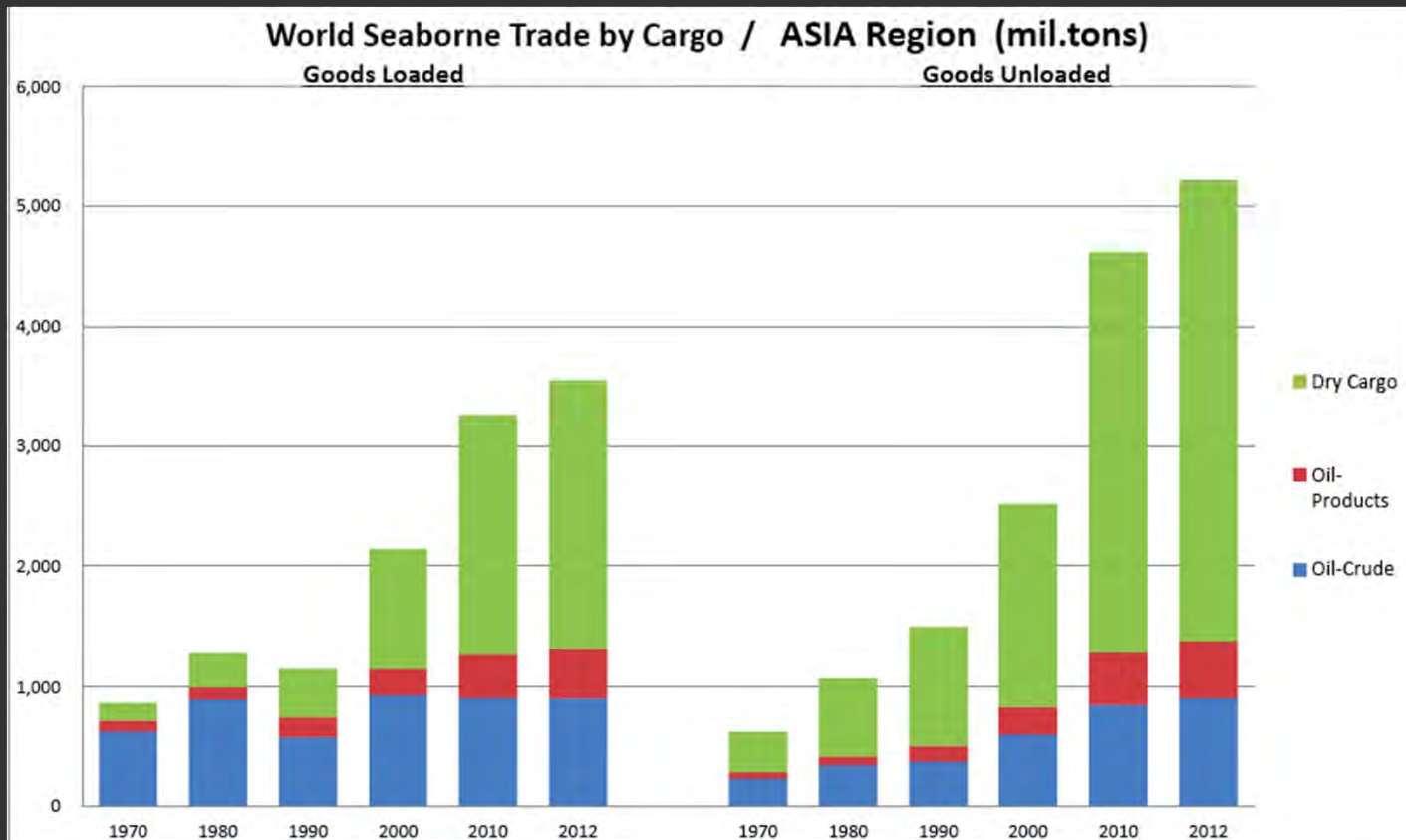
but what about lift off?



and where in Africa?



good but Asia has shown the way



what about the future

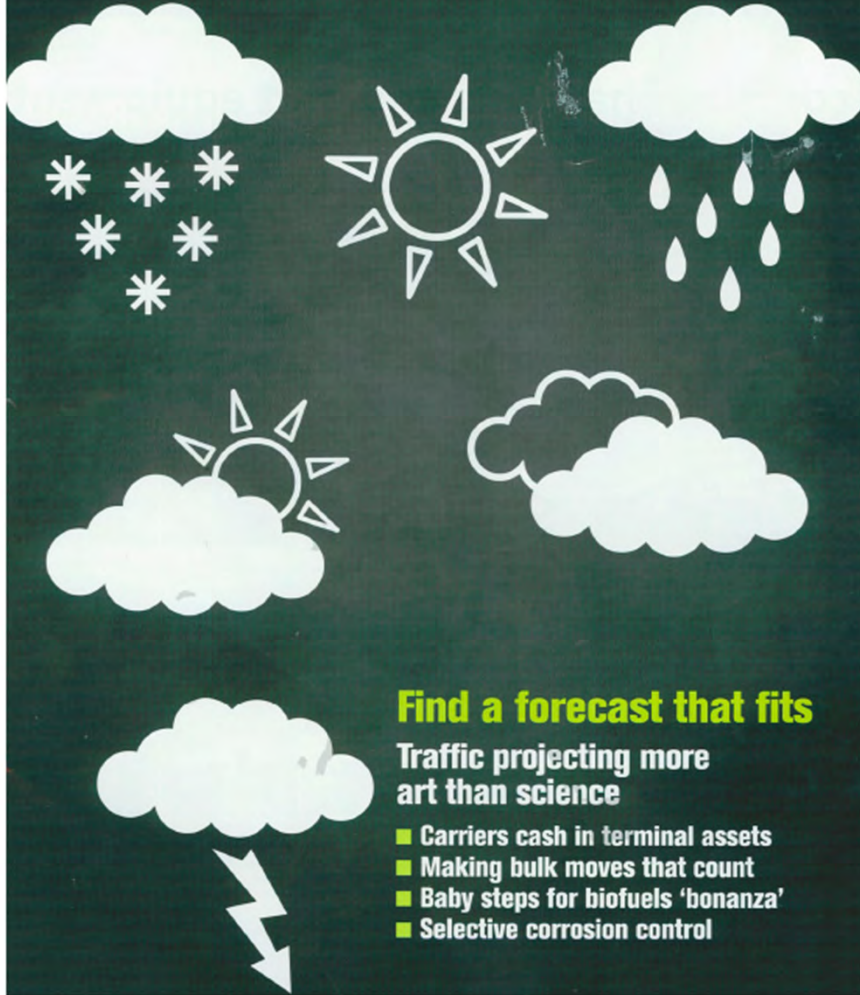
what scenarios
might play out?

wouldn't it be great
to model this?

portstrategy

Vol. 1014 Issue 4

Insight for Port Executives



Find a forecast that fits

Traffic projecting more art than science

- Carriers cash in terminal assets
- Making bulk moves that count
- Baby steps for biofuels 'bonanza'
- Selective corrosion control

Chris Fisher
Fisher &
Associates



“You can do all the forecasting you like but at the end of the day it boils down to commercial decisions”

port traffic forecasting model?

Developing a traffic model for an ever-changing picture

FISHER ASSOCIATES HAS been appointed by the UK government's Department for Transport (DfT) to develop a UK Port Traffic Forecasting Model. The work will go ahead this year, and will include consultation with leading maritime industry and government agency representatives, says principal Chris Fisher.

The company has completed 160 major consultancy and forecasting projects in 30 countries in the past 18 years, including for government and other institutions, and port and terminal clients.

However, this new contract is unusual in that Fisher is not producing a forecast directly but building a model so that the



OPEN MIND: Fisher's UK port forecasting project has to be flexible

DfT can produce its own forecasting, albeit with ongoing support from the company.

"This model is looking at the big picture – structural economic changes and many other factors – in

order to produce national port forecasts," says Mr Fisher. Some of the analysis will be simple, other parts blindingly complicated, he says. The final spreadsheet style model will take data in and use the

relationships between different variables to produce a forecast.

When is such a project finished? The answer is, never, he says – the model will have to allow for variations around the corner.

"You have to make the model flexible so it can handle different scenarios. For example, one where we do actually produce 20% of energy from renewable sources in 2020-25 and one where we don't. What will happen in Scotland decides to become an independent nation? What happens if we decide to leave the EU? Who could have predicted the Russian annexation of Crimea and what about the impact on gas? Politics and policy can have a big impact."

modeling a region's / nation's port traffic

decide what you want to achieve

determine data sources and means to do this

consult with the people who know the market

build the USER model



model by:

- country
- region
- continent

wrapping up

be thorough and analytical in approach to understanding your maritime sector and positioning within this

a scenario based modeling approach will deliver the range of future possibilities and infrastructure implications

prepare for lift off!

thank you

chris@fishermaritime.net

www.fisherassoc.co.uk

01590 626 220