

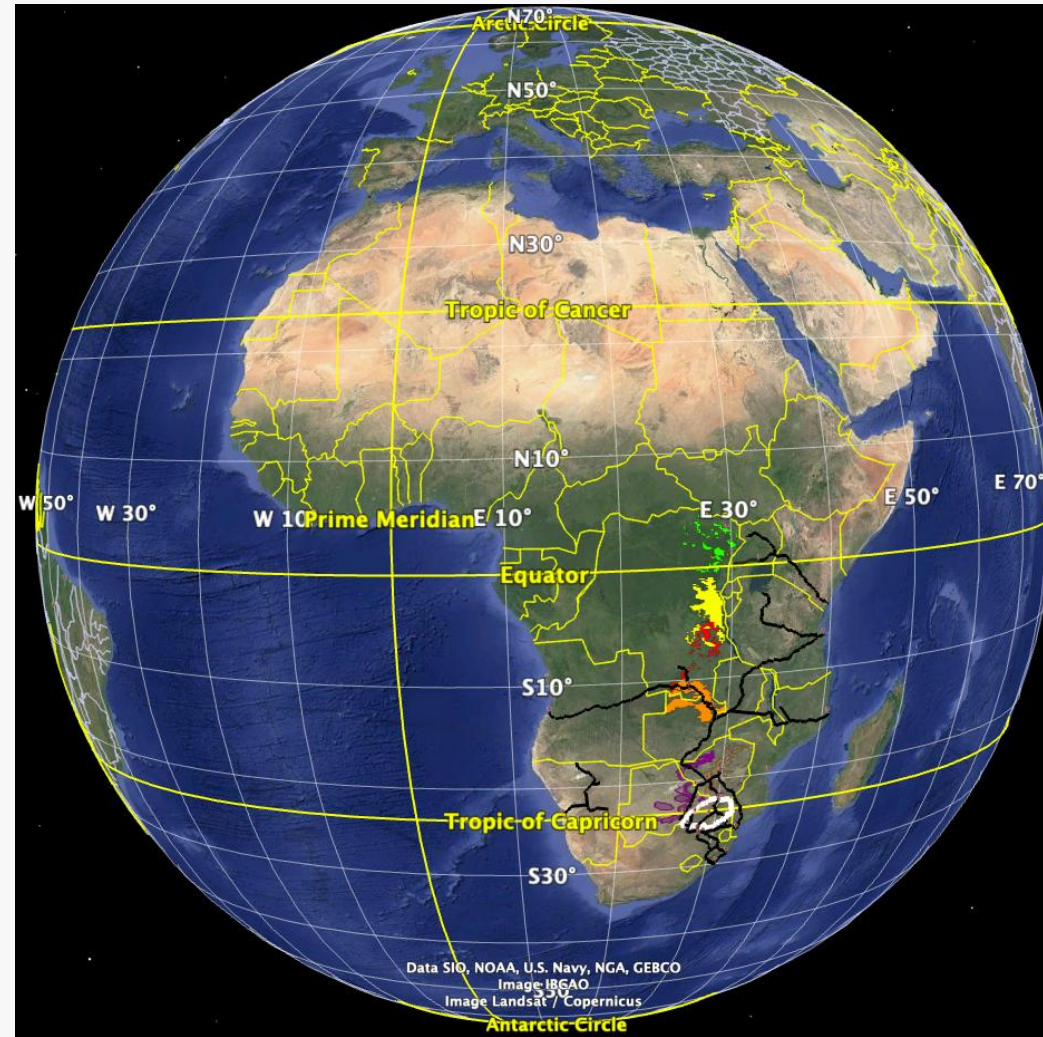
Limpopo Rising:

Africa's New Investment Frontier

Gateway to Regional Markets

Africa's New Investment Frontier

- **Unlocking Cross-Border Trade:**
Limpopo as a Regional Logistics and Distribution Hub
- **Infrastructure that Connects:**
Roads, Rail, and Border Posts for SADC Trade
- **Customs Harmonisation and Trade Facilitation**
in the North-South Corridor



LIMPOPO
PROVINCIAL GOVERNMENT
REPUBLIC OF SOUTH AFRICA



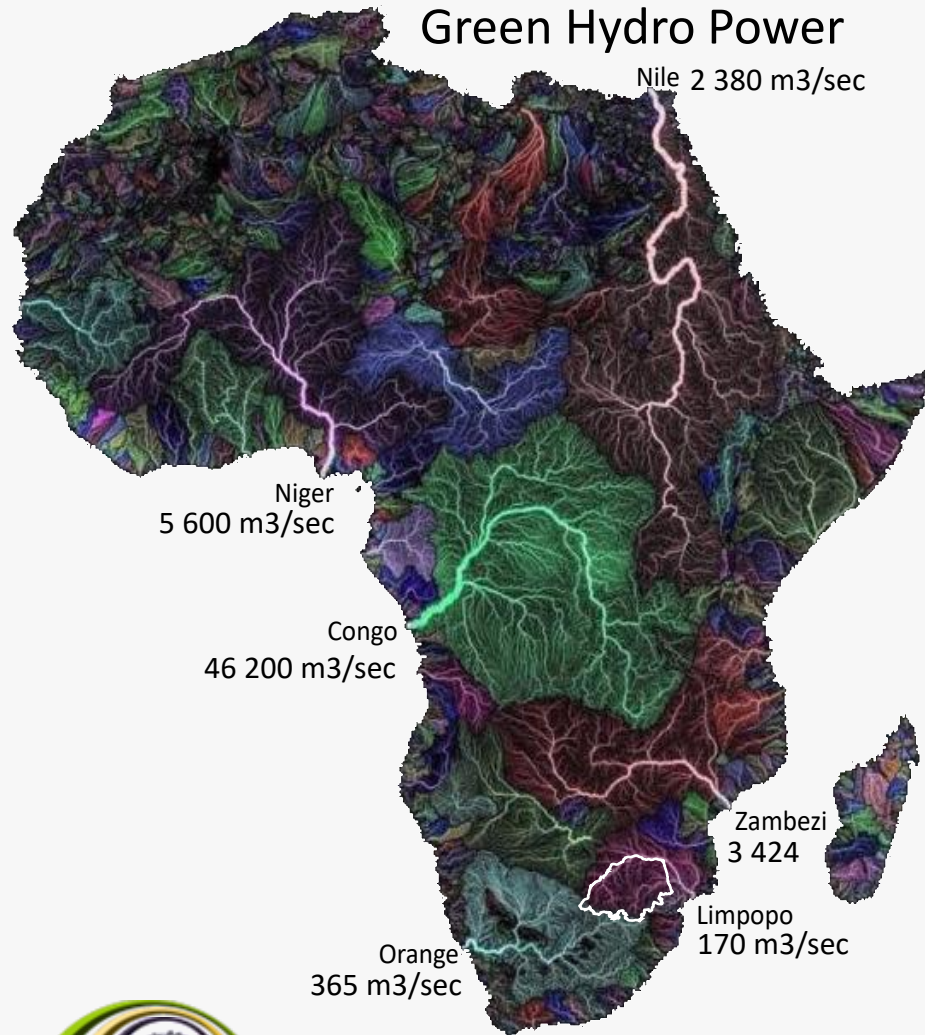
LEDA
LIMPOPO ECONOMIC
DEVELOPMENT AGENCY
AN AGENCY OF THE LIMPOPO
PROVINCIAL GOVERNMENT
REPUBLIC OF SOUTH AFRICA

ROOTED IN THE FUTURE



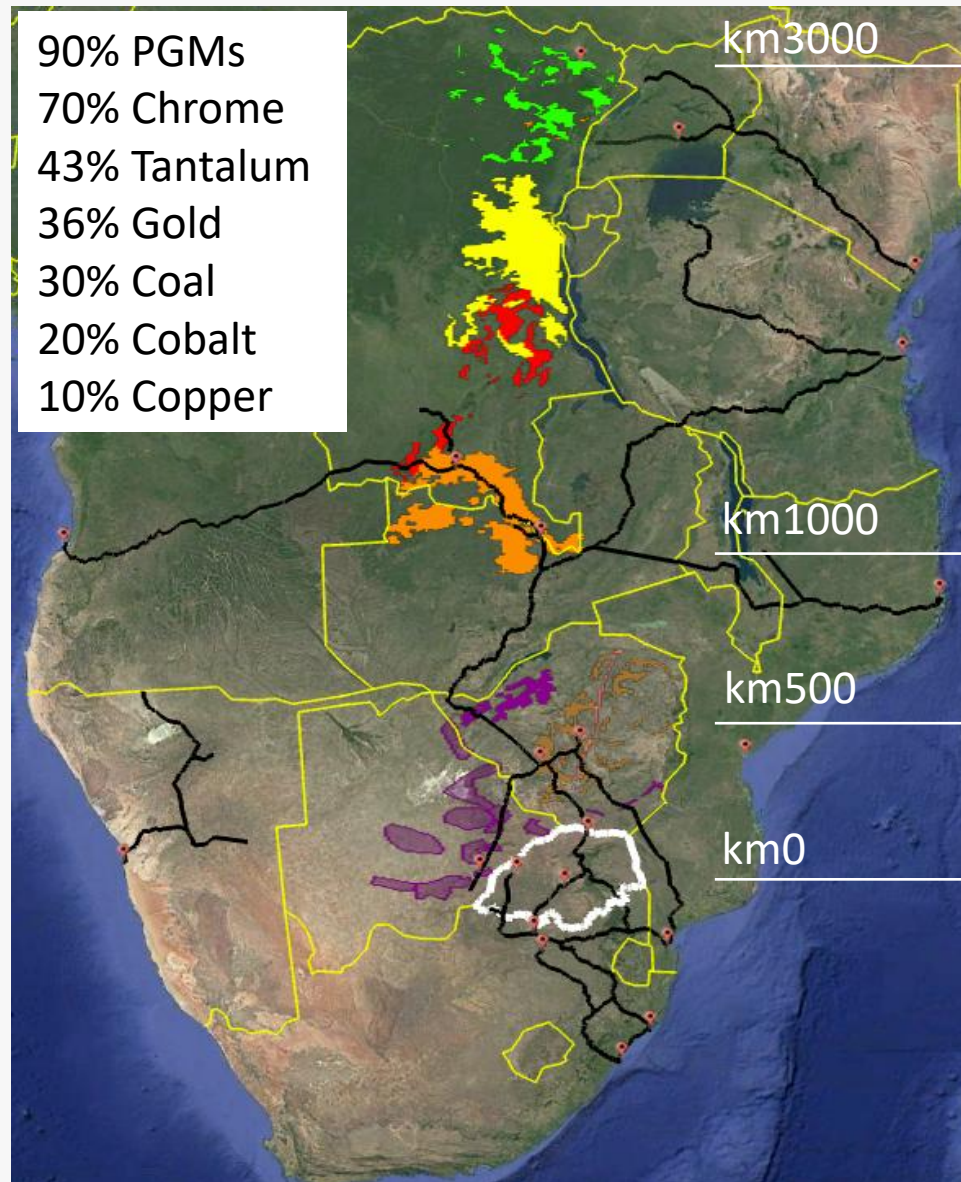
Agriculture & Run-of-River Baseload

Green Hydro Power



LIMPOPO
INVESTMENT
CONFERENCE

Mineral Resources & Baseload Coal Power

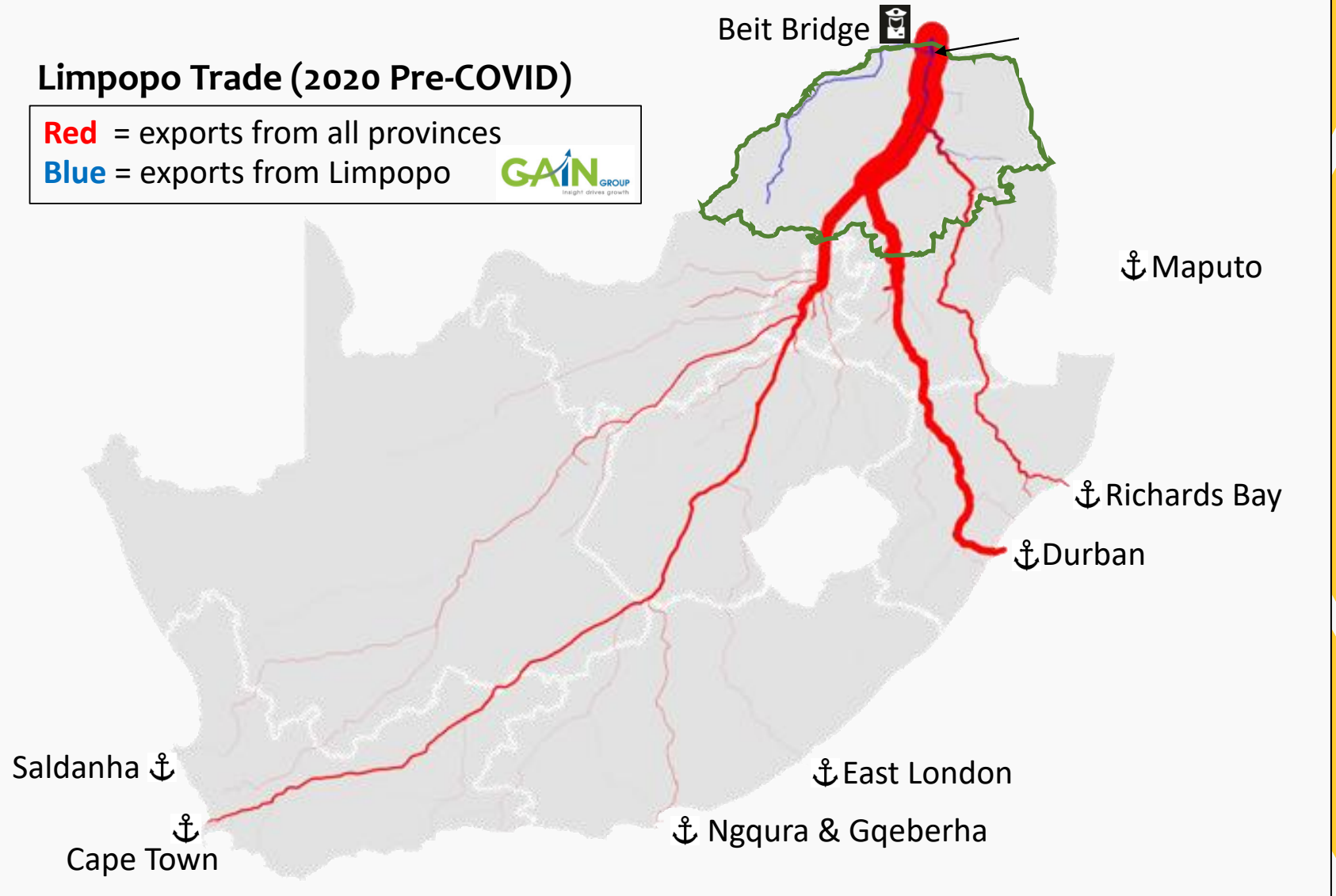


SADC + AfCFTA Regional Trade Gateway: Why at Musina

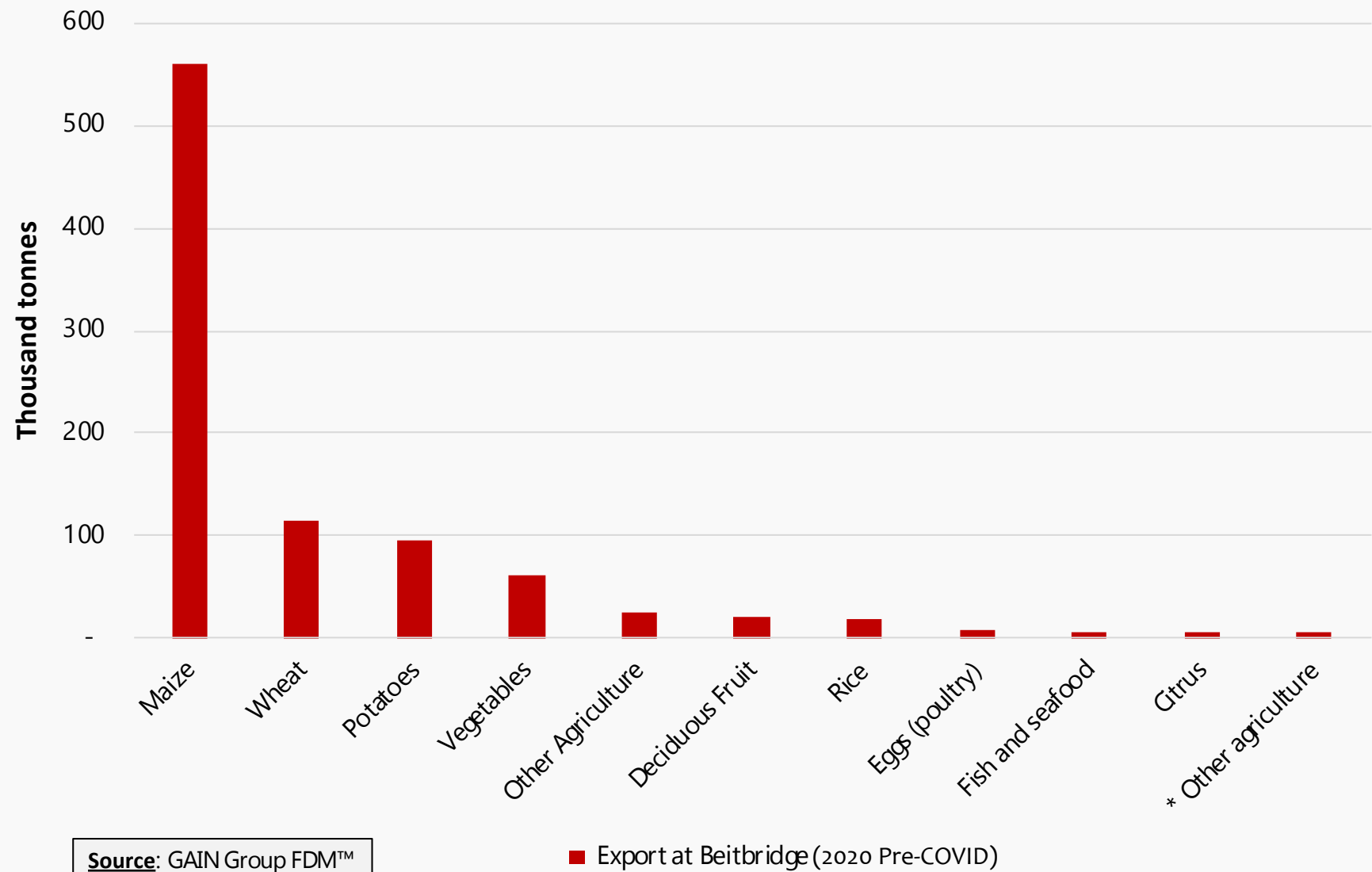
Limpopo Trade (2020 Pre-COVID)

Red = exports from all provinces

Blue = exports from Limpopo



Limpopo Agriculture Exports via Beitbridge (Musina)



Source: GAIN Group FDM™



Unlocking Key Levers to Unlock Cross-Border Trade: Limpopo as a Regional Logistics and Hub Distribution

1. **Efficient Border / Corridor Infrastructure** — Ensure fast, predictable movement of goods and people by improving border processes and upgrading key road-rail corridors linking Limpopo to SADC markets.
2. **Logistics & Distribution Infrastructure in Limpopo** — Develop integrated warehousing, intermodal, cold-chain and staging facilities to position Limpopo as a competitive regional logistics and distribution hub.
3. **Value-chain & Market Access Alignment** — Align local production and processing capabilities with regional demand, trade agreements, and AfCFTA rules to increase export readiness and cross-border competitiveness.
4. **Regulatory & Institutional Enablers** — Strengthen policies, customs systems, and cross-agency coordination to remove non-tariff barriers and improve trade facilitation efficiency.
5. **Financing & Investment Mobilisation** — Attract blended public-private investment into trade-enabling infrastructure through bankable projects, PPPs, and incentives that unlock economic returns.



SADC + AfCFTA Regional Trade Gateway: Why at Musina

Turn border friction into a competitive advantage by shifting inspections, compliance, and consolidation off the bridge and into Musina, creating South Africa's fastest, most predictable gateway for north-south trade.

- Choosing Musina as the gateway's ground zero is justified because it offers the most potent combination of strategic location, existing infrastructure, corridor alignment, and regional trade potential in Limpopo.
- Convert a congested land border into a programmable gateway at Musina
- By clearing cargo inland, privileging trusted traders, and metering arrivals with digital IDs, Musina deliver time-certain, duty-efficient access to SADC and AfCFTA markets.
- It's a Freight Village with a bonded, regulatory core—backed by Authorised Economic Operator green lanes and rail integration—so shippers get faster passage, lower risk, and broader reach.
- It maximises the value proposition of being a SADC + AfCFTA trade gateway more effectively than other entry points.



Infrastructure that connects: Roads, Rail, Border Posts for SADC Trade Limpopo-led no-regrets implementation plan

Phase (months)	Focus	Key Milestones
Short-term (0-6)	Diagnostic & coordination	<ul style="list-style-type: none"> • Establish Limpopo Logistics Hub Taskforce • Map all major crossings, corridors, and current border KPIs • Identify the top 3 bottlenecks and quick wins
Mid-term (6-18)	Infrastructure & services	<ul style="list-style-type: none"> • Upgrade Musina Intermodal Terminal (MIT) to Musina Freight Village (MFV) • Complete the Beitbridge One Stop Border Post (OSBP) improvements • Roll out a digital manifest/clearance system for freight • Begin an incentive scheme for cold-chain warehousing in the province
Longer-term (18-36)	Value-chain integration & regional scale	<p>Establish Musina as the SADC + AfCFTA Regional Trade Gateway:</p> <ul style="list-style-type: none"> • Operationalise a bonded logistics node in the MFV • Ensure rail link upgrades to the corridor (northwards & eastwards) • Launch export consolidation & distribution services for regional markets • Monitor and publish logistics KPIs quarterly



Infrastructure that connects: Roads, Rail, Border Posts for SADC Trade

Lever	12-24 month Border Post Practical Interventions	Outcome
Beitbridge	<ul style="list-style-type: none">• Permanent staging & e-slotting hub on N1 highway• Integrate SA Revenue Services pre-arrival + risk lanes• Push SA–ZW OSBP operating manual to signature	<ul style="list-style-type: none">• Lower dwell• Measured, predictable flows• Single-inspection path.
Lebombo/ Maputo	<ul style="list-style-type: none">• 24/7 synchronised cargo & people processing• Enforce the truck appointment system• Fast-track Authorised Economic Operator (AEO) lanes	<ul style="list-style-type: none">• Removes recurrent “stop-go” congestion• Prioritises time-sensitive loads.



Infrastructure that connects: Roads, Rail, Border Posts for SADC Trade ..2

Lever	12-24 month Border Post Practical Interventions	Outcome
Martin's Drift	<ul style="list-style-type: none">• OSBP design + bridge/yard expansion• Relocate biometrics & admin to pre-gate plaza	<ul style="list-style-type: none">• Clears the span• Raises peak-hour throughput• Flood-resilience.



Infrastructure that connects: Roads, Rail, Border Posts for SADC Trade ..3

Lever	12-24 month Border Post Practical Interventions	Outcome
Rail	<ul style="list-style-type: none">• Publish binational rail slot timetables• Commit to Ressano doubling timelines• Outline SA–Botswana rail works	<ul style="list-style-type: none">• Reliable rail alternative• Shifts bulk/heavy out of road queue
Transparency	<ul style="list-style-type: none">• Weekly border KPIs: truck & rail dwell, clearance times, rejects, % pre-cleared	<ul style="list-style-type: none">• Drives operational discipline• Informs metering.
Logistics nodes	<ul style="list-style-type: none">• Scale Musina ICD for pre-clear, sealing, consolidation (and temperature-controlled exports)	<ul style="list-style-type: none">• Meters flows to borders• Better AfCFTA utilisation



Customs Harmonisation and Trade Facilitation in the North-South Corridor

Do-First Provincial Playbook that Limpopo can drive:

- **Set up an Inland Border Model at Musina:**
 - Bonded pre-clearance zone + inspections inland
- **Accelerate Authorised Economic Operator (AEO) uptake:**
 - Provincial AEO hands-on support clinics
 - Create 'green-lane' Standard Operating Procedure with SA Revenue Services (SARS) / Border Management Agency (BMA)
- **Pilot OSBP-style ops now:**
 - Joint inspections & metered truck slots before full OSBP is formalised
- **Digitise corridor flows:**
 - Enforce pre-arrival filing + integrate with SADC Corridor Trip Monitoring System (CTMS) & SARS Single Window



Customs Harmonisation and Trade Facilitation in the North-South Corridor

- Quick Wins (0–6 months):
 - Launch AEO Fast-Track Cohort (20 firms) in Musina
 - Pilot pre-arrival + time-slot dispatch for two commodities
 - Publish weekly border KPIs: dwell, % pre-cleared, AEO share
- Enablers:
 - Build a truck staging hub 20–40 km south of the border
 - Form Border & Corridor Task Team with a single scorecard
- Expected Outcomes:
 - Predictable clearance for trusted traders
 - Reduced queues & logistics costs
 - Real AfCFTA utilisation & faster regional flows



Strategic Options for Limpopo: SADC + AfCFTA Regional Trade Gateway

Do Nothing / Status Quo

- No new capability, border congestion persists
- Limpopo bypassed by emerging corridors
- Jobs & investment shift to other regions

Phased / Low-Risk Entry

- Start with AEO Clinics, inland pre-clearance & staging
- Quick wins in 6–18 months, scalable to full model
- Low Capex builds confidence for PPPs

All-In: Build Full Gateway

- Full logistics ecosystem (Freight Village + Dry Port + Bonded Zone)
- High investment, high return, 3–5 yr horizon
- Positions Limpopo as a continental gateway

