

South Africa Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The South Africa Freight and Logistics Market size is estimated at USD 22.92 billion in 2024, and is expected to reach USD 30.56 billion by 2029, growing at a CAGR of 5.92% during the forecast period (2024-2029).

Most developed economy with advanced infrastructure in the Sub-Saharan Africa

- The transport sector is a key contributor to South Africa's competitiveness in the global market. The country's transport infrastructure is modern and among the most developed in Africa. In 2020, South Africa had the fourth highest rank in the Africa Infrastructure Development Index (AIDI), with 79.34 points. The index indicates the status of infrastructure development across the continent.

- South Africa has the largest economy in Africa and the most developed economy in Sub-Saharan Africa. As a member of the BRICS, an association of five major market economies, South Africa is recognized as a key emerging market along with other group members (Brazil, Russia, India, and China). In 2020, logistics costs in South Africa amounted to USD 32.9 billion. In the same year, total logistics costs in Africa amounted to USD 344.2 billion.

- The Export-Import Bank of China (Exim Bank) lent USD 29 billion to infrastructure projects in Africa between 2008 and 2020. The Chinese government institution was the leading lender of infrastructure funding in the continent. In comparison, Japan Bank for Cooperation, ranked second among main lenders, granted USD 8.5 billion to infrastructure projects in Africa during the same period.

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South Africa Freight and Logistics Market Trends

South African e-commerce fuels surge in quality warehousing demand, with USD 46 million revenue forecasted by 2025

- The South African transportation and logistics sector showed signs of recovery in 2021, with a 12% YoY growth in its contribution to GDP, driven by factors like the AFCFTA (African Continental Free Trade Agreement), increased demand in the cold chain market, the rise of e-commerce, and expanded transportation and logistics services. In the fourth quarter of 2022, the industry experienced a modest 0.7% growth, contributing 0.1% to the overall economic performance. This growth was particularly noticeable in land transport, air transport, and communication services.
- The demand for quality warehousing in Africa skyrocketed due to the rapid proliferation and growth of e-commerce platforms across the continent. This increase in online retail sales is expected to continue, with e-commerce revenue nearly doubling to reach USD 46 million by 2025. The country's supply is expected to increase as developers such as Africa Logistics Properties and Improvon plan to deliver over 400,000 sq. m of speculative space to the market by the end of 2024.
- In South Africa, road transport dominates freight transportation, representing about 63% of all freight ton-kilometers. The government focuses on the National Development Plan (NDP), which aims to achieve a 30% investment-to-GDP ratio. Meeting the infrastructure needs outlined in the NDP is projected to cost over ZAR 6 trillion (USD 0.35 trillion) from 2016 to 2040, with energy and transportation accounting for 72% of this expenditure. The government has introduced the National Infrastructure Plan 2050 to address these challenges, prioritizing key areas such as energy, freight transport, water, and digital infrastructure.

Average Brent Crude oil price increased from USD 79.75 to USD 84.78 in September 2023, due to tightening supply resulting from production cuts by Saudi Arabia

- South Africa ranked 65th out of 157 countries regarding the most expensive fuel prices per liter. In 2022, the global average price of gasoline was USD 1.44 per liter. In 2022, the petrol price per liter in South Africa was ZAR 23.29 (USD 1.37). South African petrol prices are higher than those of other African countries, except for Zimbabwe. Factors, such as currency exchange rates, contribute to the overall fuel price, while several levies, taxes, and margins are also added to the pump price.
- Fuel prices in South Africa rose by 278% from 2002 to 2022. Petrol 95 has grown by 368% since 2008, while diesel 50 ppm has grown by 51%. The wholesale price of 500 ppm diesel is set to rise to ZAR 22.33 (USD 1.31) at the coast and ZAR 23.05 (USD 1.35) inland from September 2023, with 50 ppm increasing to ZAR 22.58 (USD 1.32) and ZAR 23.29 (USD 1.37), respectively.
- South Africa's fuel prices are adjusted monthly, updated by international and local factors. International factors include South Africa importing crude oil and finished products at a price set at the international level, including importation costs. The average value for South Africa from May to August was ZAR 22.39 (USD 1.31), with a minimum of ZAR 22.10 (USD 1.30) in July 2023 and a maximum of ZAR 22.98 in May 2023. The average Brent crude oil price increased from USD 79.75 to USD 84.78 in September because of tightening supply resulting from production cuts by Saudi Arabia. Based on current local and international factors, the fuel prices in September 2023 for petrol (both 93 and 95 Octane) increased by 171 cents per liter (USD 1.71), while those of diesel increased by 284 cents (USD 2.84) per liter.

South Africa Freight and Logistics Industry Overview

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The South Africa Freight and Logistics Market is fragmented, with the top five companies occupying 3.32%. The major players in this market are Dachser, DSV A/S (De Sammensluttede Vognmænd af Air and Sea), FPT Group (PTY) Ltd, Imperial Logistics (Pty) Ltd and Savino Del Bene (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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