

South Africa Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The South Africa Freight and Logistics Market size is estimated at 14.7 billion USD in 2025, and is expected to reach 19.9 billion USD by 2030, growing at a CAGR of 6.24% during the forecast period (2025-2030).

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

- In Q4 2023, the e-hailing giant inDrive made its foray into South Africa's freight landscape, debuting its services in Cape Town and Johannesburg. Branded as inDrive.Freight, this new platform empowers users to dispatch parcels with direct cost negotiations with drivers. The platform boasts a diverse fleet, catering to both personal and commercial needs, facilitating deliveries of parcels weighing up to 20,000kg within its network.
- In February 2024, M24 Logistics, a division of Media24 specializing in warehousing and distribution for African B2B and B2C merchants, unveiled a state-of-the-art warehouse in Montague Gardens. Spanning 30,000 sq. m, this facility is tailored to serve major players in both the B2B and e-commerce realms while also accommodating small and medium-sized enterprises (SMEs). With a distribution network spanning over 30 African countries, M24 Logistics takes pride in its fine-picking capabilities.

South Africa Freight and Logistics Market Trends

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Rising government initiatives witnessed focused on improvement of transport infrastructure helping reduce recession conditions

- As of March 2024, Namibia and South Africa are planning infrastructure projects worth ZAR 7 billion (USD 411.9 million) over the next three years to address rail and port inefficiencies. Namibia's Ministry of Finance is starting with ZAR 2 billion (USD 117.69 million) in 2024 for projects linking the two countries and other parts of Southern Africa. South Africa's economy narrowly avoided a recession in 2023 due to transport bottlenecks and power shortages, prompting the government to involve the private sector to improve port and rail efficiency.
- In South Africa, road transport dominates freight transportation. 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

- Fuel prices are expected to drop again in September 2024, with the latest data showing a strong over-recovery for both petrol and diesel. The Central Energy Fund (CEF) suggests petrol prices may decrease by 65 cents (93 Unleaded) and 70 cents (95 Unleaded), while diesel could fall by 53 cents (500ppm) and 50 cents (500ppm). These cuts might bring petrol prices just below January 2024 levels, with 95 Unleaded at around ZAR 21.62 (USD 1.27) on the coast and ZAR 22.41 (USD 1.31) inland, and 93 Unleaded at about ZAR 22.06 (USD 1.29).
- The IMF projects South Africa's GDP growth at 1% for 2024, lower than the 4% forecast for other emerging markets. Growth is expected to improve to 1.4% in 2025 and 2026 as load-shedding decreases and new power capacity comes online. The SARB offers a slightly higher forecast of 1.2% for 2024 and 1.5% for 2025 and 2026. Both the IMF and SARB see potential for interest rate cuts in late 2024 as inflation eases, which could boost consumption.

South Africa Freight and Logistics Industry Overview

The South Africa Freight and Logistics Market is fragmented, with the major five players in this market being DP World (including Imperial Logistics (Pty) Ltd.), DSV A/S (De Sammensluttete Vognmand af Air and Sea), Kuehne+Nagel, Laser Group and Savino Del Bene SpA (sorted alphabetically).

Additional Benefits:

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

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