

## **South Africa Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

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### **Report description:**

South Africa Freight And Logistics Market Analysis

South Africa freight and logistics market size in 2026 is estimated at USD 15.55 billion, growing from 2025 value of USD 14.70 billion with 2031 projections showing USD 20.59 billion, growing at 5.78% CAGR over 2026-2031. Stable macro-economic reforms, the African Continental Free Trade Area rollout, and renewed private investment in core transport corridors provide the structural pillars for expansion. Merchandise trade diversification toward regional markets is lifting demand for multimodal solutions, while the digitization of order fulfillment is accelerating last-mile parcel volumes. Infrastructure upgrades approved for Durban and Cape Town ports indicate long-needed capacity relief, although execution risk remains elevated. Currency volatility and driver shortages continue to weigh on operating costs, yet technology-led visibility tools help operators mitigate service disruptions and maintain high asset utilization.

South Africa Freight And Logistics Market Trends and Insights

Surge in E-commerce Parcel Volumes

Legislative liberalization in 2024 opened postal services to competition, enabling private operators to enter a CEP market that had been historically reserved for the South African Post Office (SAPO). Amazon's 2024 launch alongside Takealot's fulfillment network expansion multiplied daily parcel flows, prompting a rapid build-out of micro-fulfillment hubs close to consumer clusters. Bob Group installed automated parcel lockers across Gauteng malls, reducing failed deliveries and cutting average last-mile costs by

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18%. Rider-supported routing platforms improve drop-density and compress delivery windows to six hours in metropolitan zones. Collectively, these shifts force incumbents to pivot from bulk optimization to high-frequency, high-precision parcel distribution anchored by API-based visibility tools.

#### Public-Private Partnerships for Rail Revamp

A December 2024 access framework granted qualified operators the right to run trains over Transnet lines, unlocking latent capacity on the Gauteng-Durban corridor. Anglo American's USD 233 million compensation deal in May 2025 underscored growing private confidence in shared-track models. Early pilot services cut manganese export dwell time by 26% and trimmed unit costs 14% versus road haulage. Challenges persist, however, with cable theft costing the grid USD 327.60 million annually and rolling-stock age averaging 28 years. Government security task forces and on-board sensor alerts are being scaled to secure assets ahead of broader open-access adoption.

#### Rail Network Under-Maintenance and Theft

Transnet recorded a USD 398.59 million loss in FY 2023/24, capturing the depth of deferred maintenance across signaling, track and rolling stock assets. Cable theft forced the closure of 1 300 rail-kilometers, pushing bulk manganese, coal and container traffic onto road, inflating highway congestion and increasing per-ton logistics spend 18%. Business hesitate to commit volume to corridor revitalization until asset security improves, despite the open-access framework assuring third-party control rights.

Other drivers and restraints analyzed in the detailed report include:

Growing Intra-Africa Trade Under AfCFTA Cold-Chain Demand from Agro-Exports Chronic Port Congestion and Equipment Age

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Manufacturing generated 37.45% of the South Africa freight and logistics market share in 2025 on the back of automotive, chemicals, and processed food output. Vehicle exports passing through Gqeberha demand specialized roll-on/roll-off scheduling and secure yards, supporting premium freight rates. Yet wholesale and retail trade grows at 6.42% CAGR between 2026-2031, as omnichannel retailers integrate click-and-collect and returns management, multiplying touchpoints and parcel flows.

Agricultural exporters require temperature-controlled trucking fleets able to meet tight EU arrival windows within 22 days of harvest. Construction material logistics correlates with national infrastructure spend, generating episodic cement, steel, and heavy-lift project cargo spikes. The oil and gas, mining, and quarrying segment remains foundational, yet modal shifts toward pipeline and rail for environmental compliance reshape cost structures. Renewables projects create new lanes for oversized wind-tower components, demanding route surveys and escort vehicles that only a subset of operators can supply.

The South Africa freight and logistics market size for logistics functions was dominated by freight transport at 73.68% in 2025, evidencing continued commodity bulk flows from mining and agriculture. Courier, express, and parcel activities are advancing at a 6.92% CAGR (2026-2031), catalyzed by online retail penetration that hit 7.5% of national sales in 2024. Private entrants leverage the revised Postal Services Act to erode legacy SAPO share, pursuing API enabled delivery applications that integrate directly with e-commerce platforms. Investments in micro-fulfillment sites within 30 km of key metro zones shorten average delivery promise to same day, aligning with rising consumer expectations.

Warehousing and storage occupy an essential supporting layer. Temperature-controlled capacity is expanding fastest as citrus,

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avocado, and pharmaceutical consignments require validated humidity and thermal profiles end-to-end. High-throughput automated racking systems yield picking accuracy above 99%, improving SKU availability for omnichannel retailers. Freight forwarding remains a critical orchestrator of cross-border movements, with value shifting toward data-rich trade compliance services rather than physical consolidation alone. The South Africa freight and logistics market continues to see operators bundle customs brokerage, cargo insurance and ESG reporting to defend yields against pure-play price challengers.

The South Africa Freight and Logistics Market Report is Segmented by End User Industry (Agriculture, Fishing, and Forestry, Construction, Manufacturing, Oil and Gas, Mining and Quarrying, Wholesale and Retail Trade, and Others) and by Logistics Function (Courier, Express, and Parcel (CEP), Freight Forwarding, Freight Transport, Warehousing and Storage, and Other Services). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

A.P. Moller - Maersk Africa Global Logistics Bertling Logistics CMA CGM Group (Including CEVA Logistics) DACHSER DHL Global Forwarding DP World (Including Imperial Logistics Pty Ltd.) DSV A/S (Including DB Schenker) FedEx FPT Group (Pty) Ltd. Grindrod, Ltd. Heneways Freight Services (Pty) Ltd. Kuehne+Nagel Laser Group Logwin Megafreight Services (Pty) Ltd. SACO (Including SACO Shipping) Savino Del Bene SpA Transnet Freight Rail United Parcel Service of America, Inc. (UPS)

Additional Benefits:

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

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