

# South Africa - Transport and Logistics: Government expenditure to drive growth (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

South Africa is the most developed economy in sub-Saharan Africa. As a member of the BRICS countries, South Africa is recognised as a key emerging market along with the other members of the group Brazil, Russia, India and China. South Africa has an extensive network of roadways and both the number of vehicles and volume of freight traffic is increasing. South Africa's road network length recorded a CAGR of 0.23%, from 612,305.0 kilometers in 2012 to 619,387.0 kilometers in 2017 and is anticipated to increase further at a CAGR of 0.17%, from 620,814.3 kilometers in 2018 to 625,089.4 kilometers in 2022.

MarketLine's Premium industry reports provide a comprehensive overview of the market and include sections on: risk and reward, key industry trends and drivers, SWOT analysis, competitive landscape, innovation, deals, key developments, and industry benchmarking to compare key performance indicators with regional and global markets.

### Key highlights

Government initiatives and expansion projects to drive rail freight traffic in the country

The railway sector is a key component in improving South Africa's transport and logistics network. Rail freight traffic recorded a CAGR of 6.1%, rising from 120.0 billion

ton km in 2012 to 161.4 billion ton km in 2017 and is anticipated to post a CAGR of 7.7%, from US\$173.5 billion ton km in 2018 to US\$233.2 billion ton km in 2022.

GVA from other transportation is anticipated to increase

GVA from other transport recorded a CAGR of 2.8%, rising from US\$14.1bn in 2012 to US\$16.2bn in 2017 and is anticipated to post a CAGR of 7.2%, from US\$18.0bn in 2018 to US\$23.8bn in 2022. This will primarily be due to an increase in the demand for support services such as repair mechanics due to an increase in road freight volumes and passengers. Passengers recorded a CAGR of 3.3%, rising from 33.9 million in 2012 to 39.7 million in 2017, and are anticipated to post a CAGR of 4.9%, from 41.4 million passengers in 2018 to 50.2 million in 2022.

Port container capacity to decrease over the forecast period

Transnet National Ports Authority (TNPA) manages and controls South Africa's eight commercial seaports and the majority of the terminals are operated on a common user basis by Transnet Port Terminals (TPT), a business division of Transnet. South Africa's port container storage capacity recorded a CAGR of 0.2%, from 4.3 million TEUs in 2012 to 4.4 million TEUs in 2017. However, it is anticipated to post a CAGR of -1.2% and fall from 4.4 million TEUs in 2018 to 4.2 million TEUs in 2022 due to weak port infrastructure, capacity constraints at various terminals, and a lack of equipment and facilities.

## SCOPE

**Risk & Reward Index:** The Risk & Reward index compares the position of South Africa's transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

**Industry Snapshot and Industry View:** Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and export gross value added, FDI and trends driving market performance.

**Industry SWOT Analysis:** Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in South Africa's transport and logistics market.

**Industry Benchmarking:** Benchmark how South Africa's transport and logistics market is performing compared to regional and global markets in terms of GVA, fleet size and freight traffic by mode.

**Competitive Landscape:** Overview of industry players compared with their peers across a set of indicators.

## **REASONS TO BUY**

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the South Africa transport and logistics industry compared to other countries in Middle East and Africa?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the South Africa transport and logistics industry and their presence in respective segment?

What trends are being witnessed within the South Africa transport and logistics industry?

What are the South Africa transport and logistics industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the South Africa transport and logistics industry?

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