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Transport and storage industry, 2023

An overview of the results

Joe de Beer

DDG: Economic statistics

Embargo: 27 August 2025, 10h00



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The survey

Large sample survey covering approximately **3 000** enterprises registered for value-added tax (VAT)

Included activities

- Railway transport
- Other passenger land transport
 - Other scheduled passenger land transport
 - Other non-scheduled passenger land transport
- Freight transport by road
- Transport via pipelines
- Water transport
 - Sea & coastal water transport
 - Inland water transport
- Air transport
- Cargo handling
- Storage & warehousing
- Other supporting transport activities
- Travel agencies & related activities
- Activities of other transport agencies

Excluded activities

- Minibus taxis
- Municipal bus services
- Bus companies that are not registered for VAT
- Rental of private cars/buses without drivers
- Rental of trucks without drivers
- Enterprises for which transport is a secondary or auxiliary activity



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The survey

When was it conducted?

- Questionnaires were completed for the financial year ended on any date between 1 July 2022 and 30 June 2023
- Employment figures are for 30 June 2023

What data did it collect?

- General themes:
 - Finances
 - Employment
 - Services
 - Provincial estimates
- Title of the PDF report:
Transport and storage industry, Report No. 71-02-01 (2023)



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1. Economic importance

2. Finances

3. Employment

4. Services

5. Provincial estimates

Exploring the industry



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Economic
importance



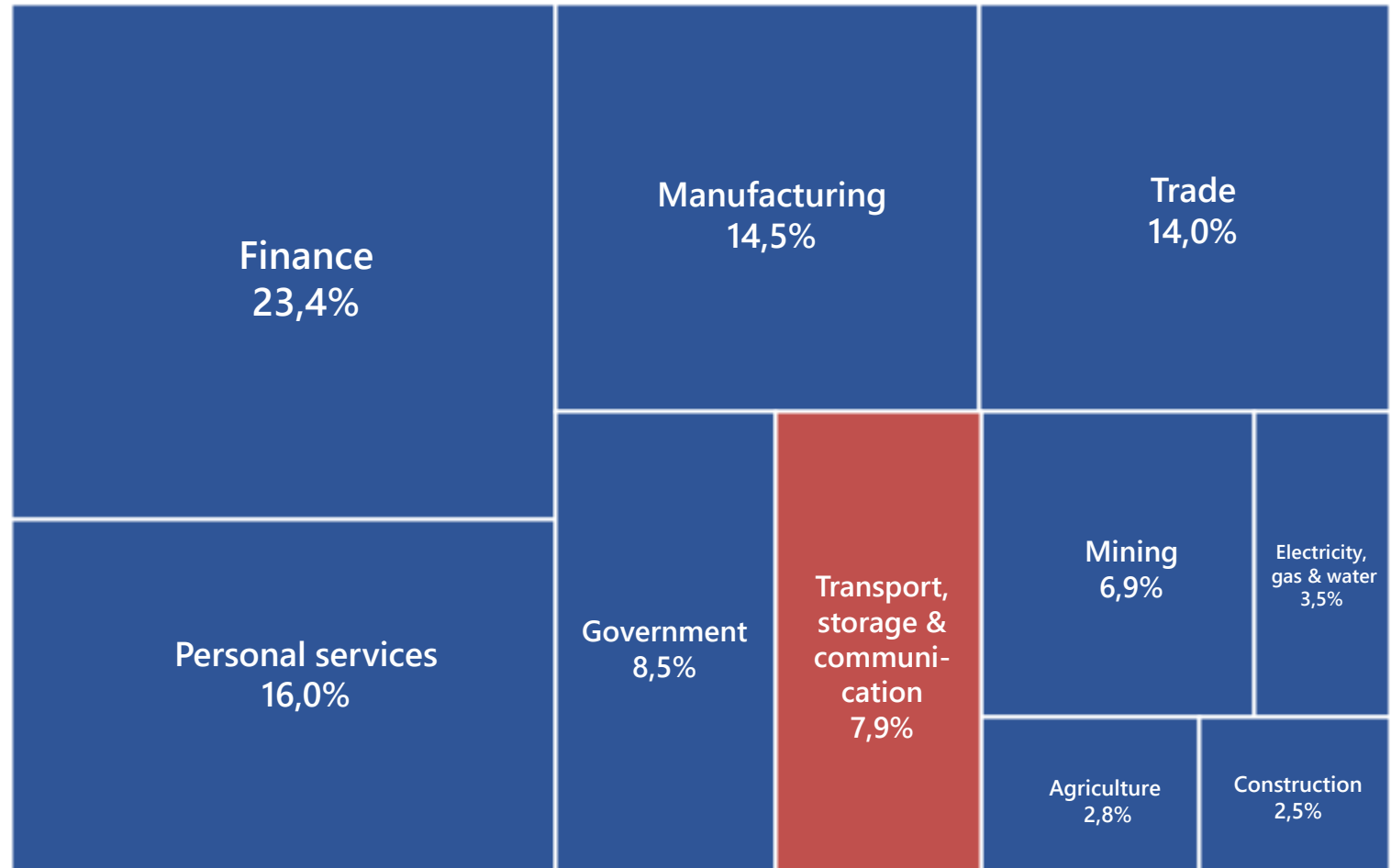
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Transport, storage & communication accounted for **7,9%** of economic activity in 2023

Percentage contribution of industries
to total value added
Total: R6,3 trillion*



* Current prices Source: Gross domestic product, First quarter 2025



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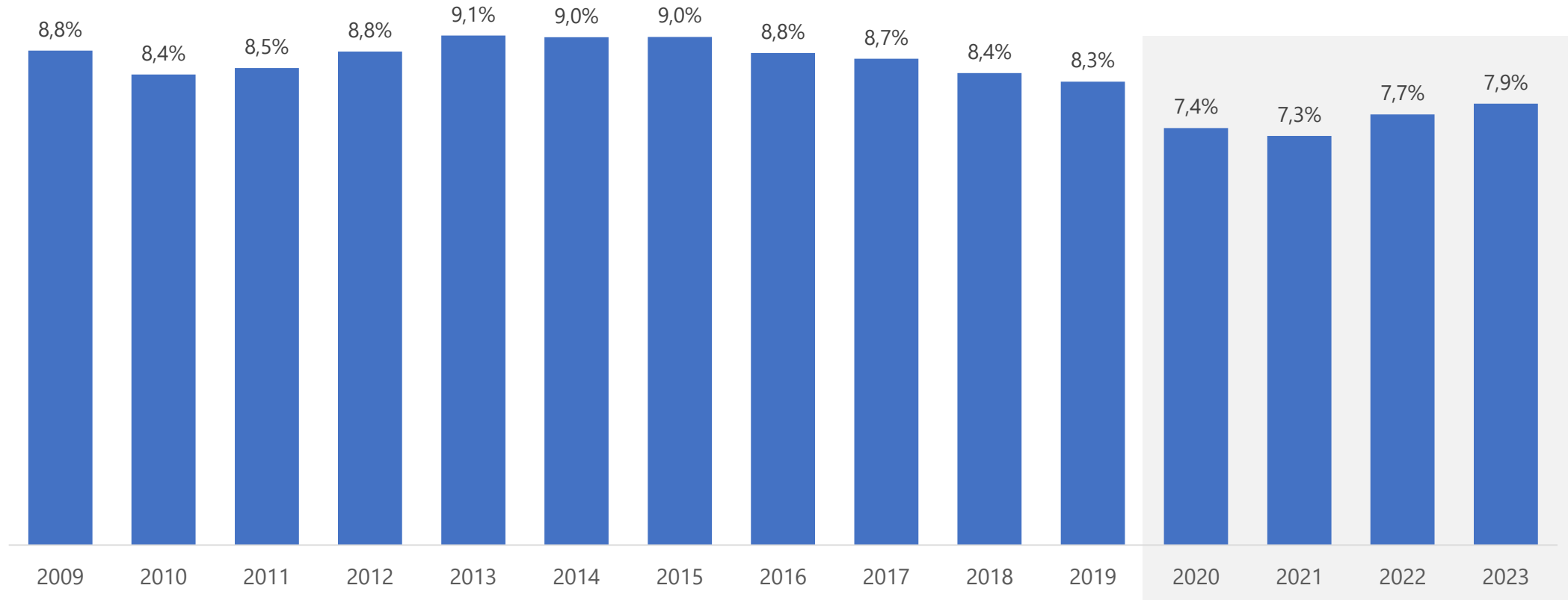
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Contribution to value added remains below pre-pandemic levels

Percentage contribution of transport, storage & communication to total value added



* Current prices Source: Gross domestic product, First quarter 2025



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Finances



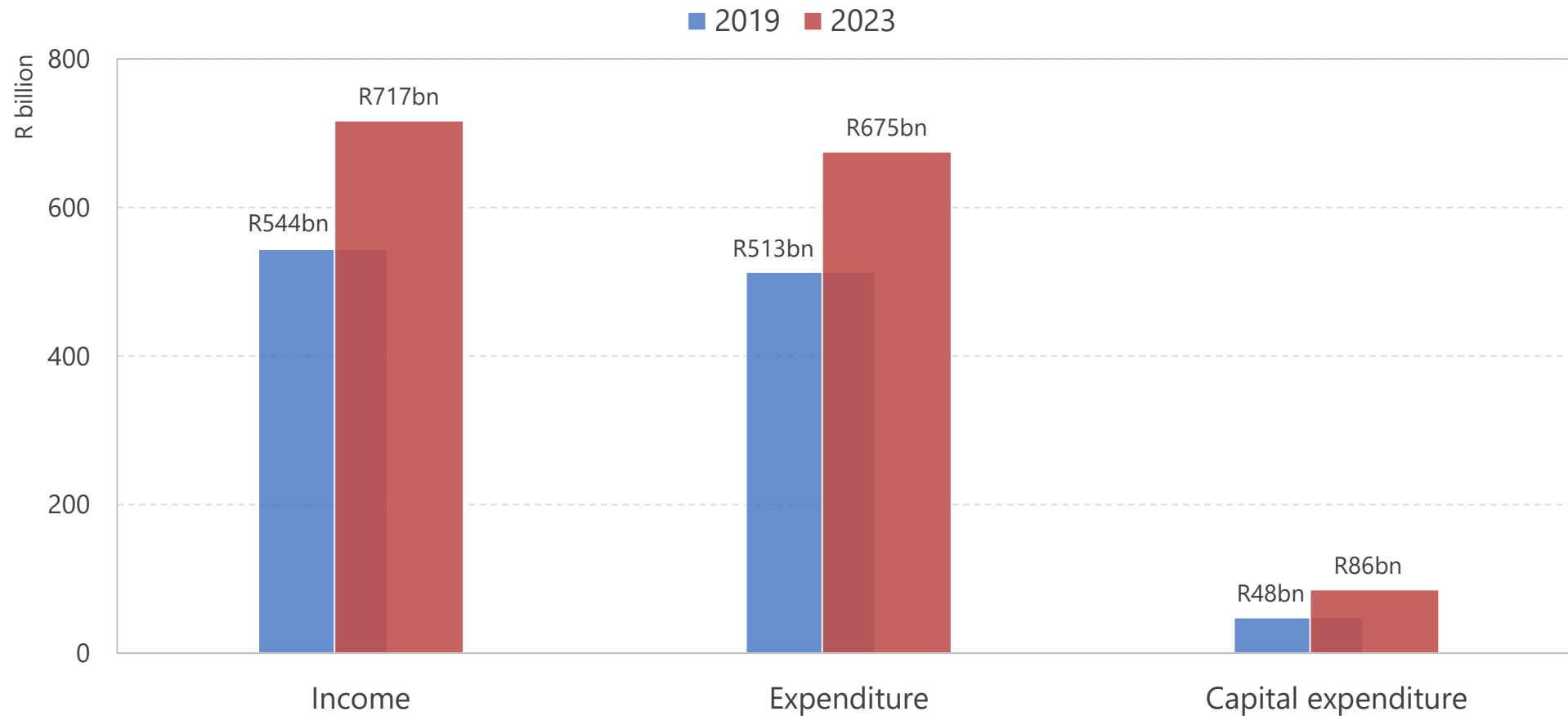
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Financial summary

In 2023, the transport & storage industry generated R717 billion in income, up from R544 billion in 2019



Source: Table 1



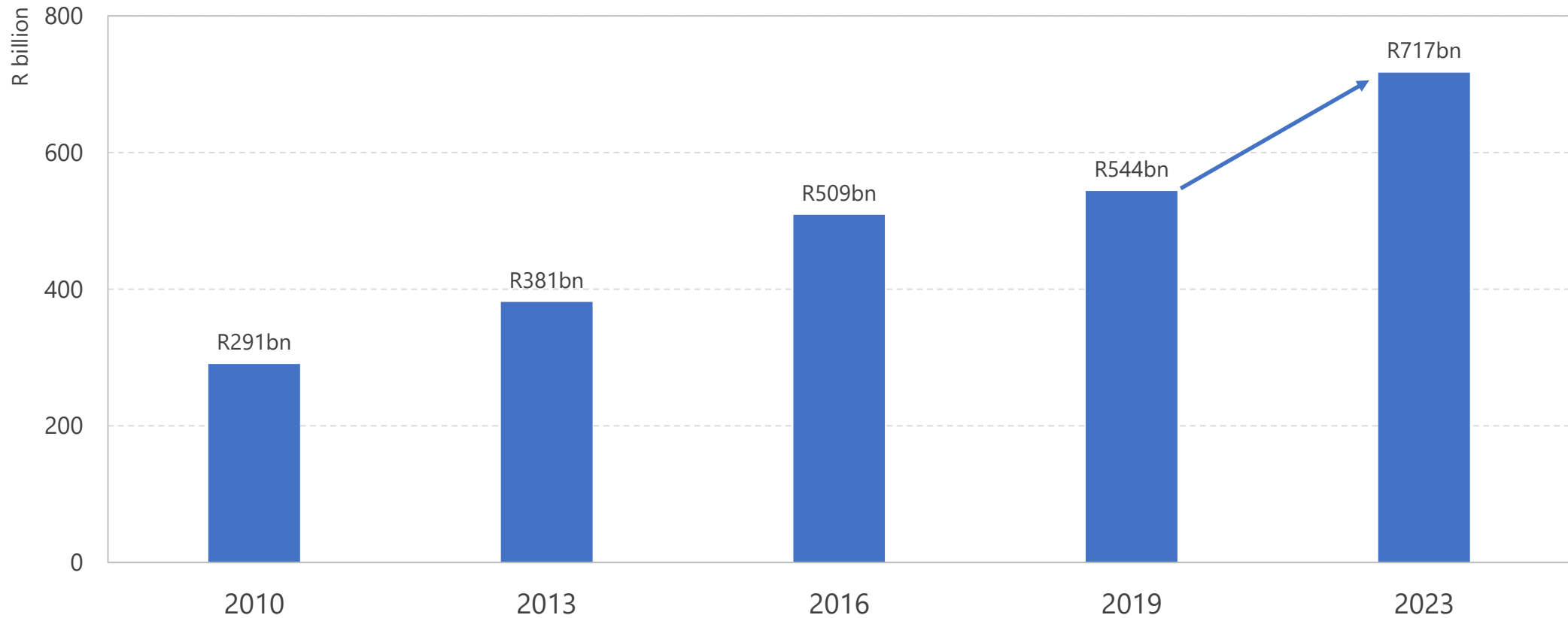
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Total income increased by **7,2%** per annum in 2023 compared with 2019

Total income in the transport & storage industry



Source: Table A and data from the 2019 report



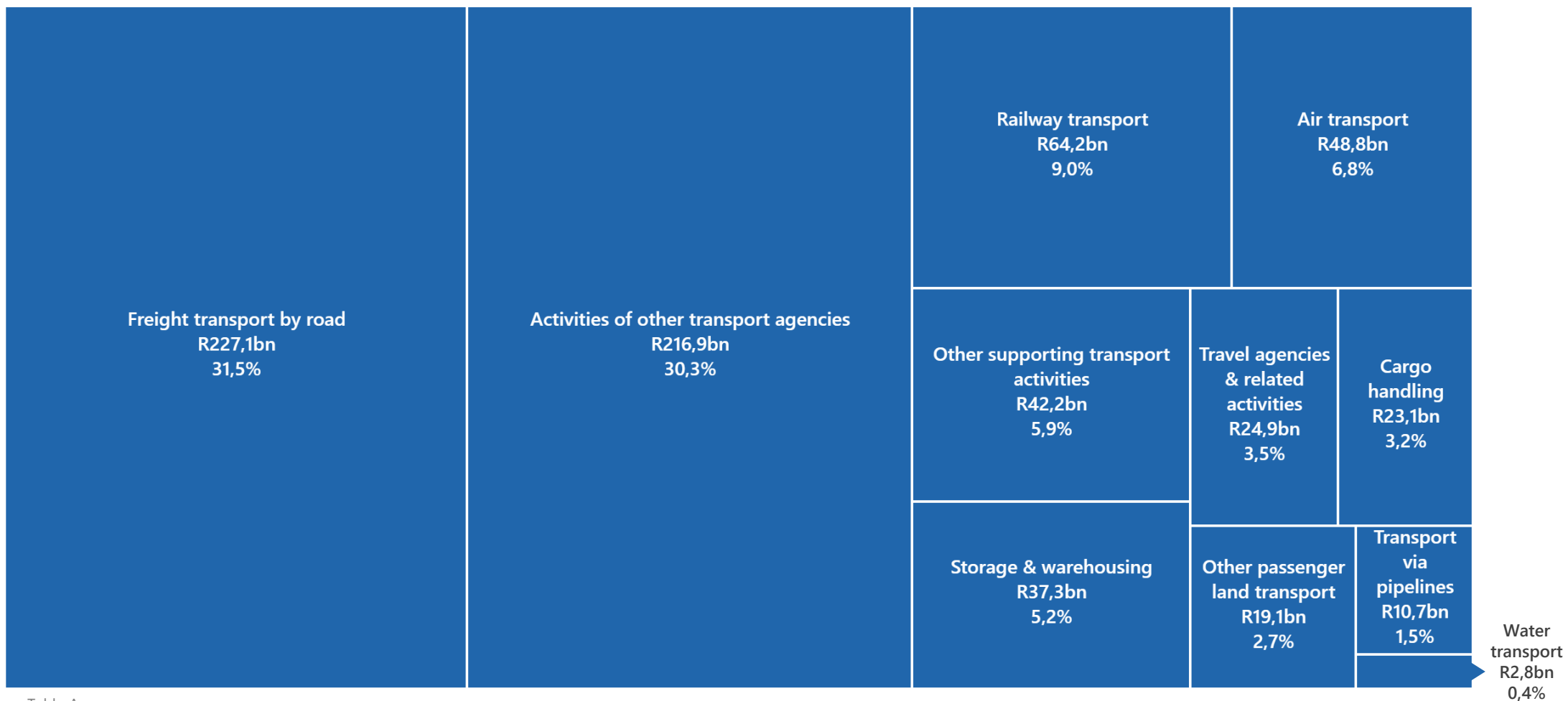
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Freight transport by road accounted for **31,5%** of total income in 2023

Income by type of activity in the transport & storage industry Total: R717,0 billion



Source: Table A



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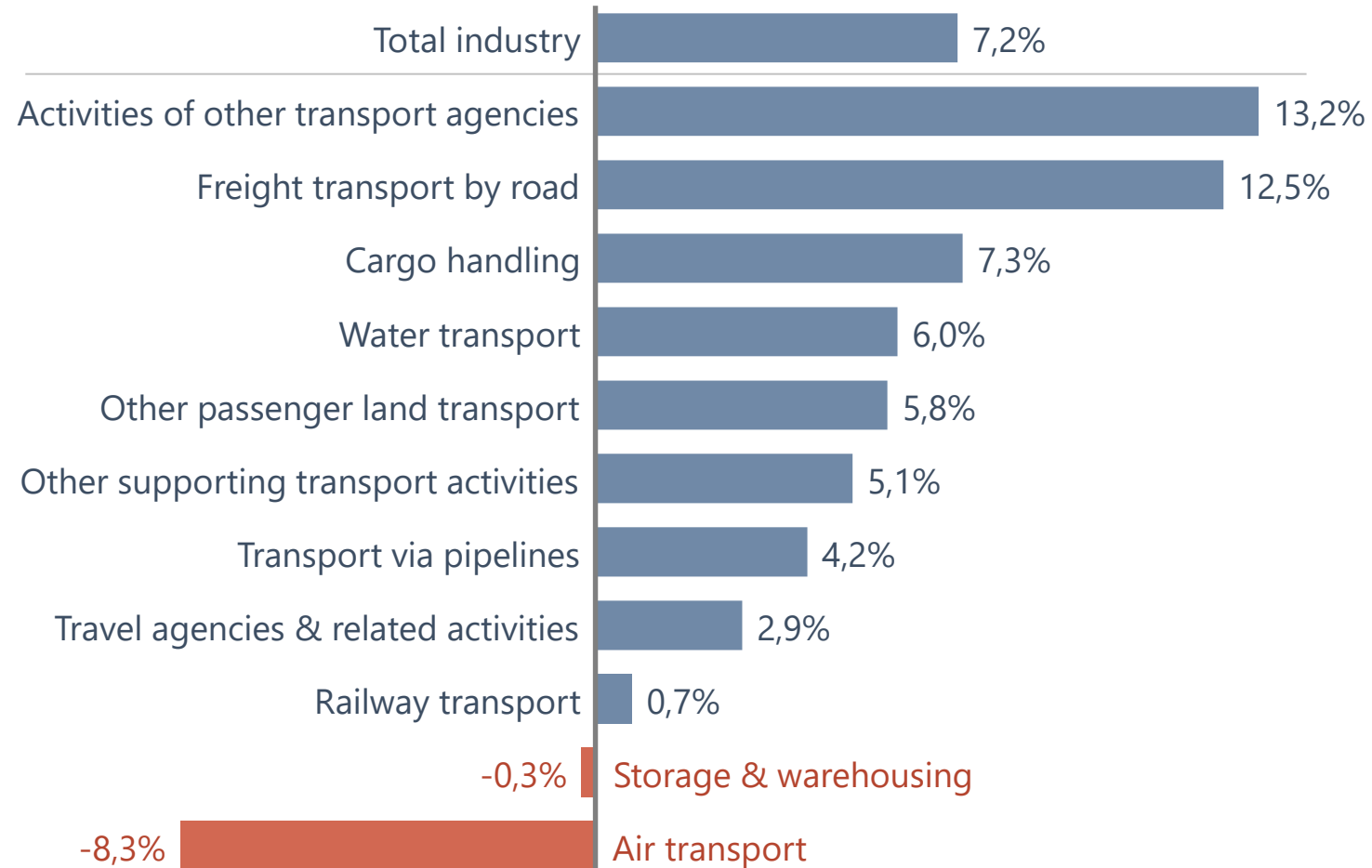
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Air transport and storage & warehousing recorded a decline in income

Annualised percentage change, 2023 compared with 2019



Source: Table 2

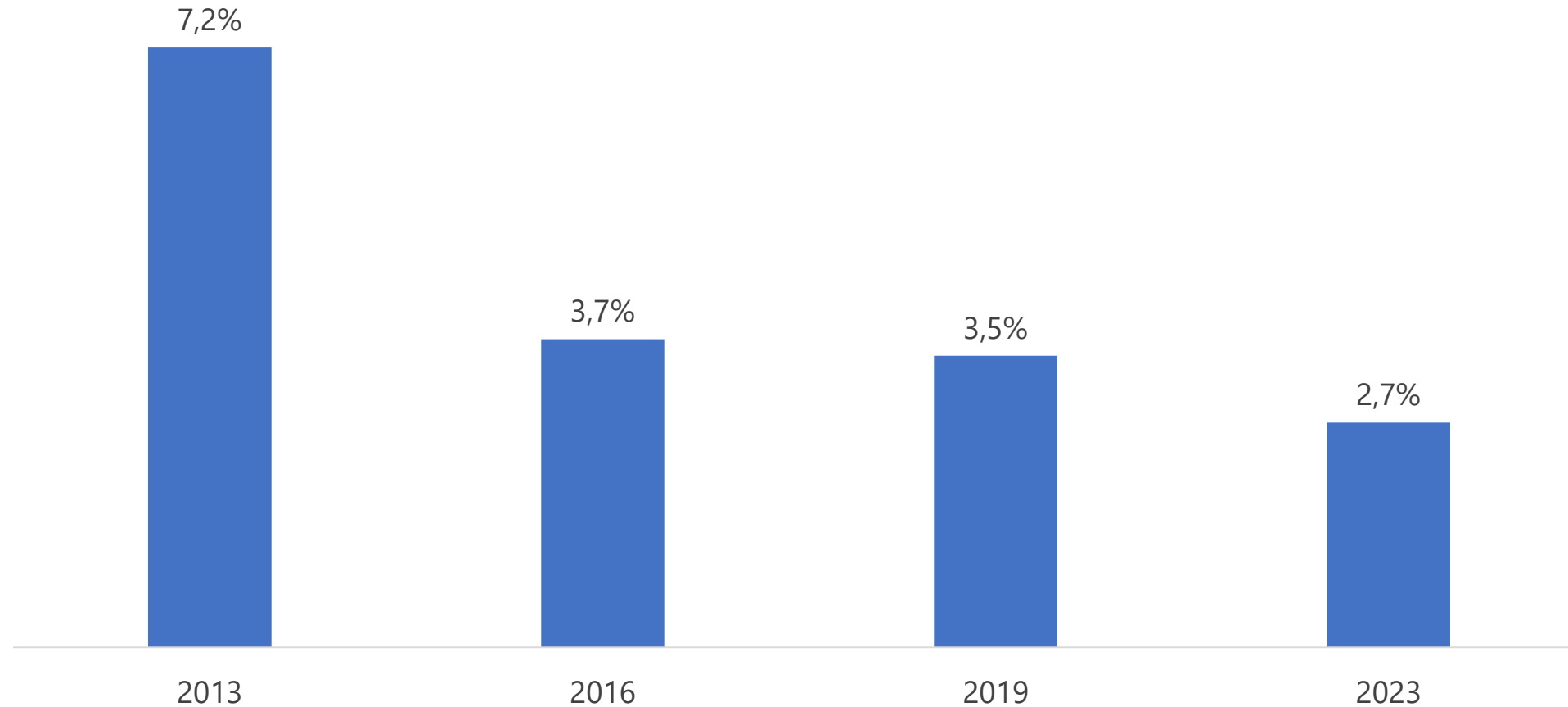


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The profit margin for the transport & storage industry has declined since 2013



Source: Table C



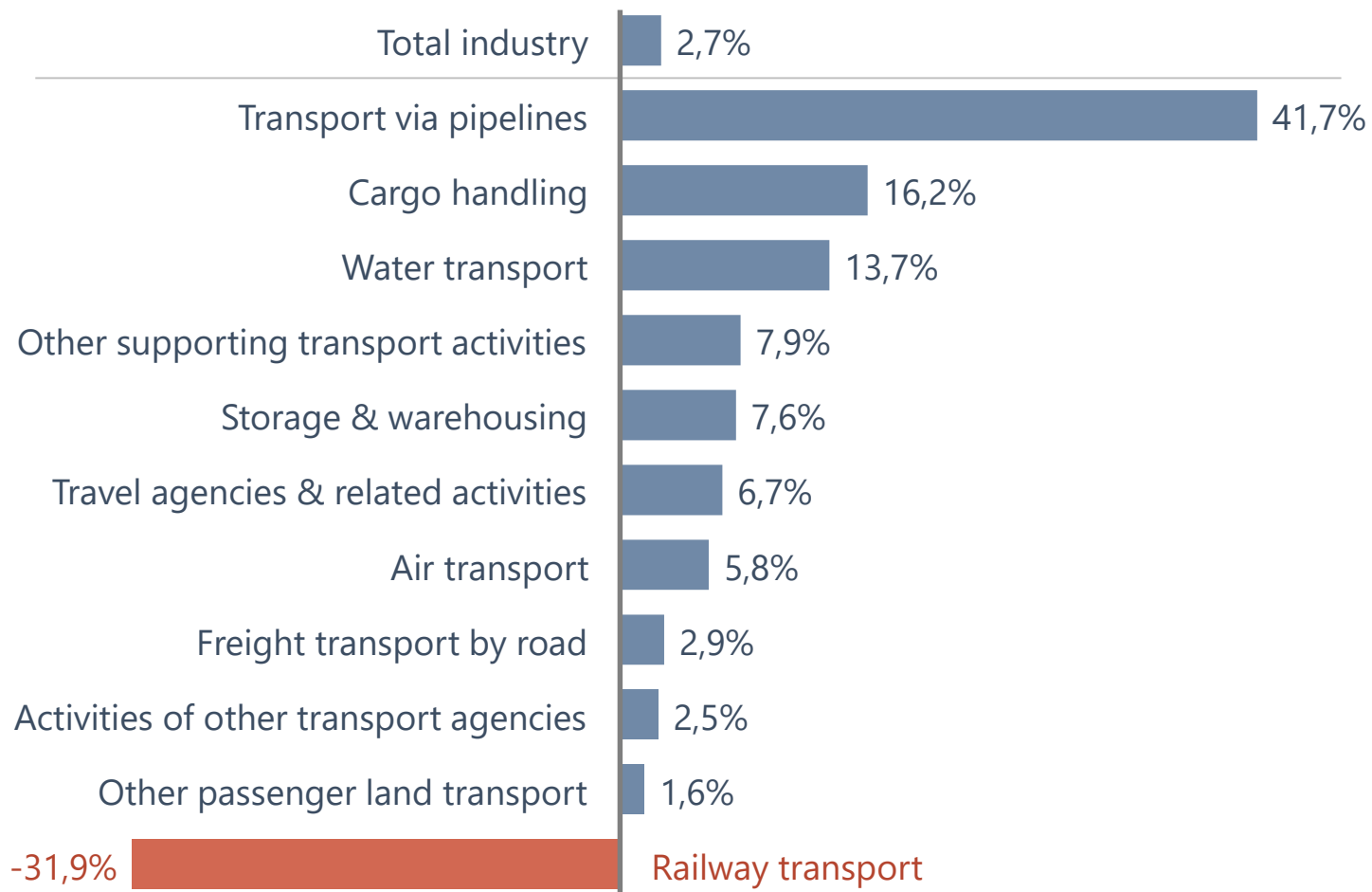
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Railway transport recorded a loss in 2023

Profit margins by type of activity



Source: Table C



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The largest five enterprises contributed **17,3%** of total income in 2023, down from **22,5%** in 2019

Concentration ratios for total income in the transport & storage industry

Concentration ratio	2013	2016	2019	2023
CR5	27,1	22,5	22,5	17,3
CR10	34,7	29,7	28,7	23,2
CR20	43,7	38,6	35,7	30,2
CR50	55,5	50,9	47,0	41,3
CR100	65,3	60,5	56,2	51,4

Source: Table B



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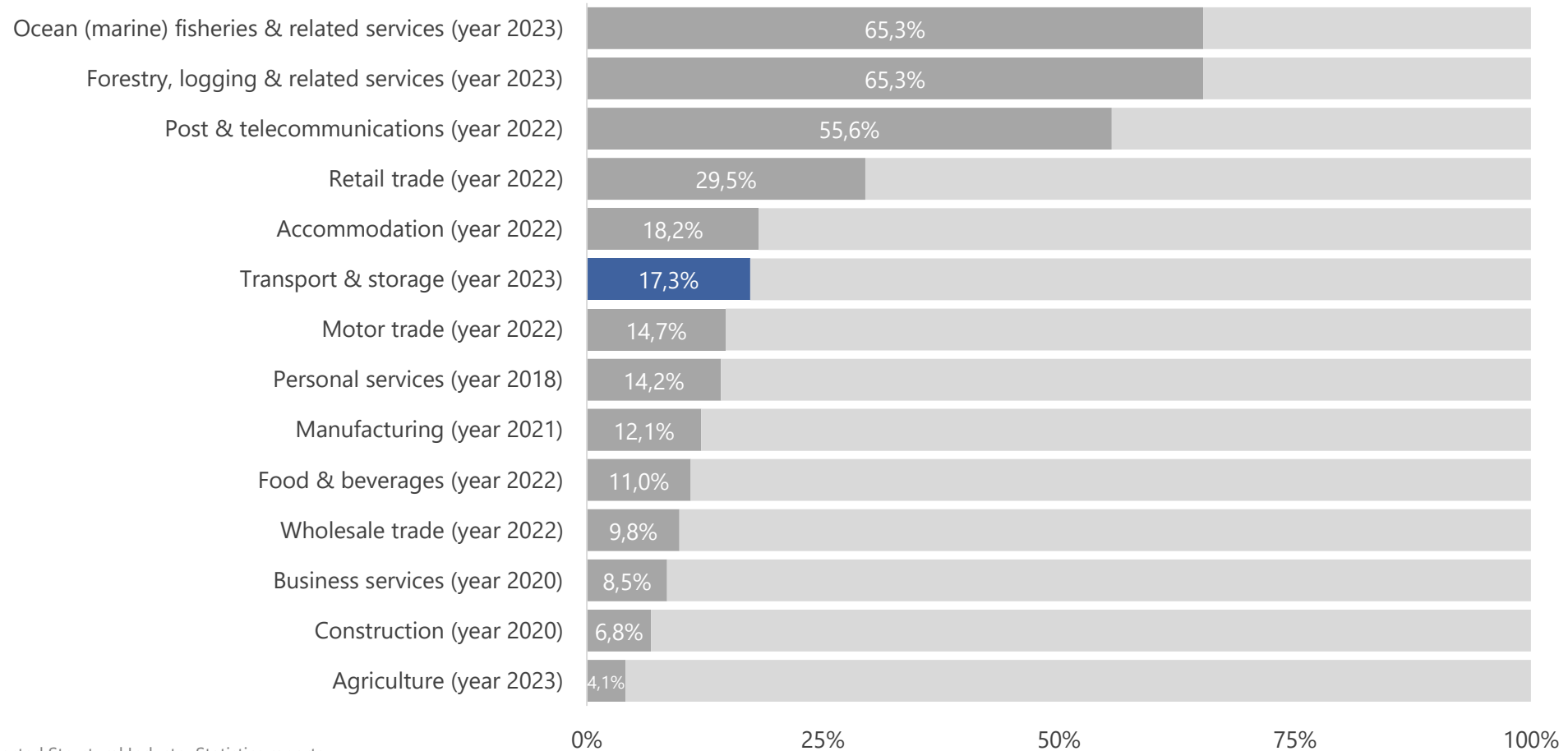
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Transport & storage is more concentrated than manufacturing

Top 5 firms concentration ratios for selected industries in the South African formal business sector

The percentage of income in each industry generated by the five largest firms



Source: Selected Structural Industry Statistics reports



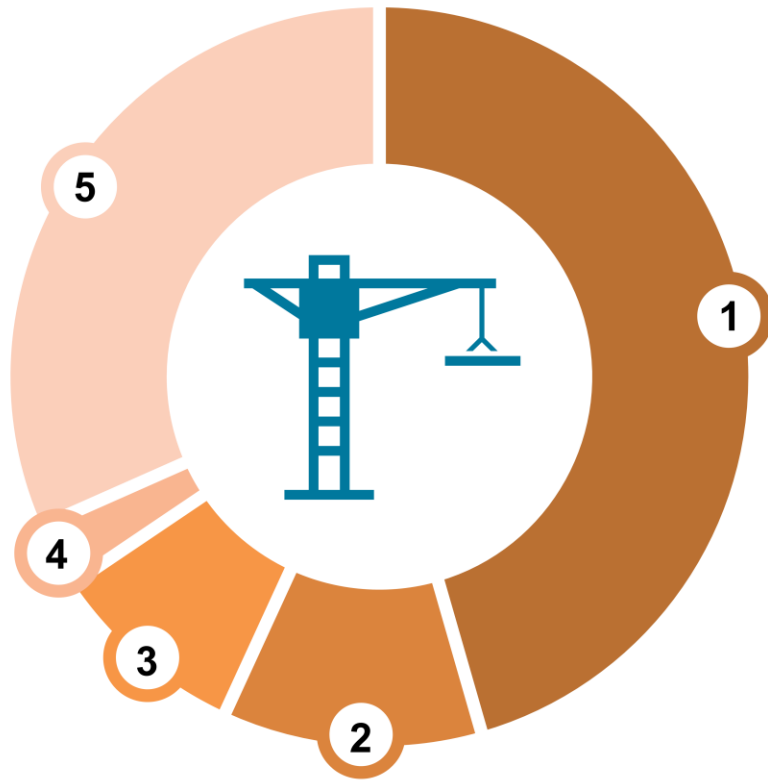
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Motor vehicles, locomotives & other transport equipment accounted for **45,5%** of capital expenditure

Capital expenditure on new assets by type of asset in the transport & storage industry, 2023



- 1 45,5%** – Motor vehicles, locomotives & other transport equipment
- 2 11,3%** – Land, buildings, construction works & leasehold improvements
- 3 8,7%** – Plant, machinery and equipment
- 4 2,8%** – Computers & other ICT equipment
- 5 31,6%** – Other new assets

Source: Table 10



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Employment



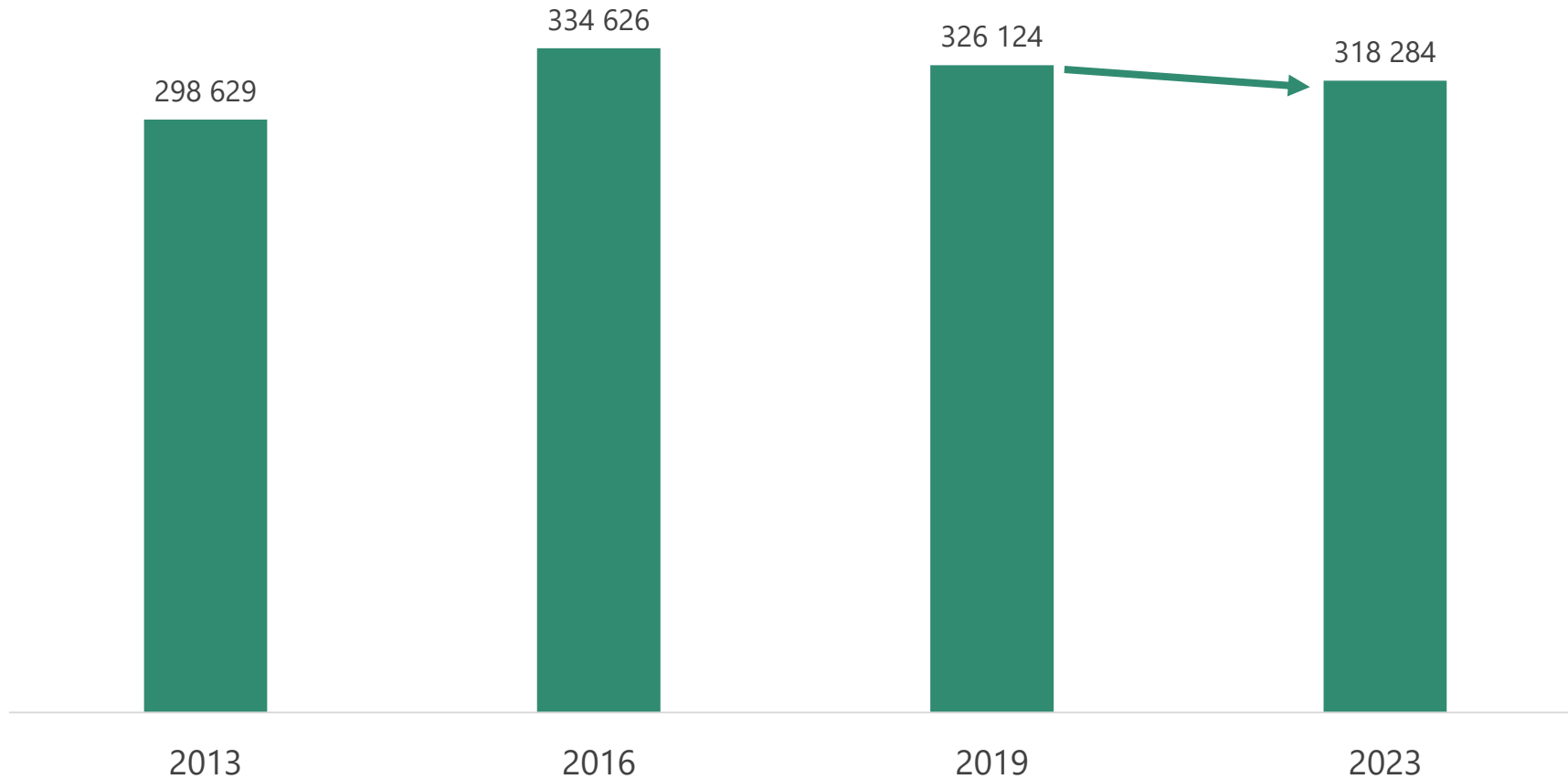
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The labour force shrank by **0,6%** per annum in 2023 compared with 2019

Number of employed persons in the transport & storage industry



Source: Table D



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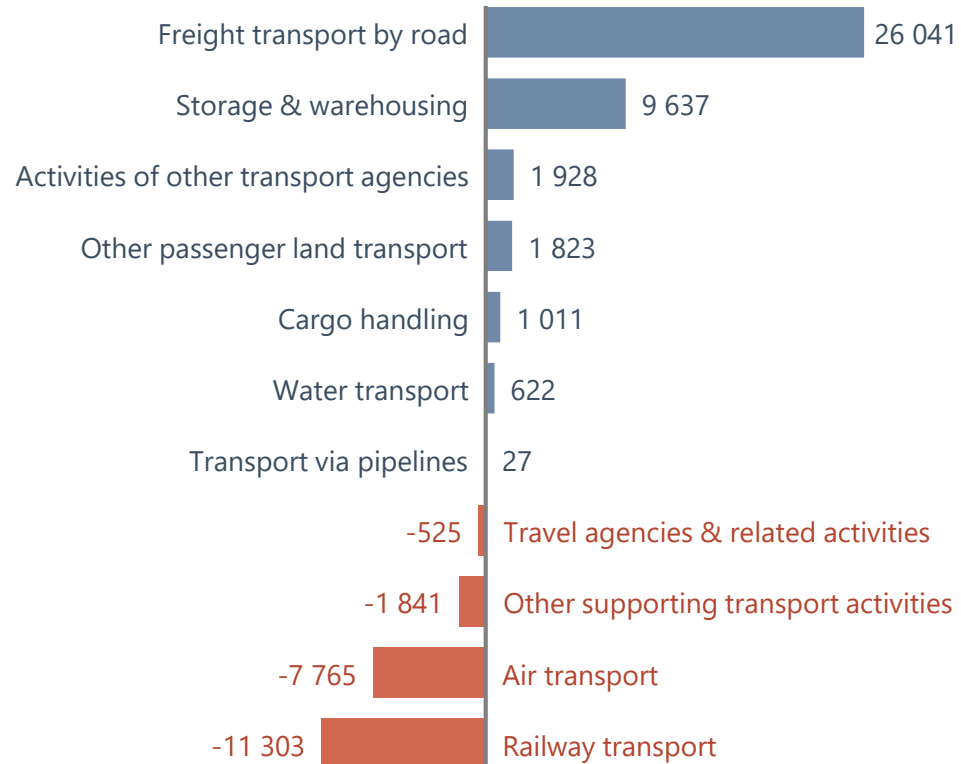


Which activities gained or lost jobs?

Net change in jobs

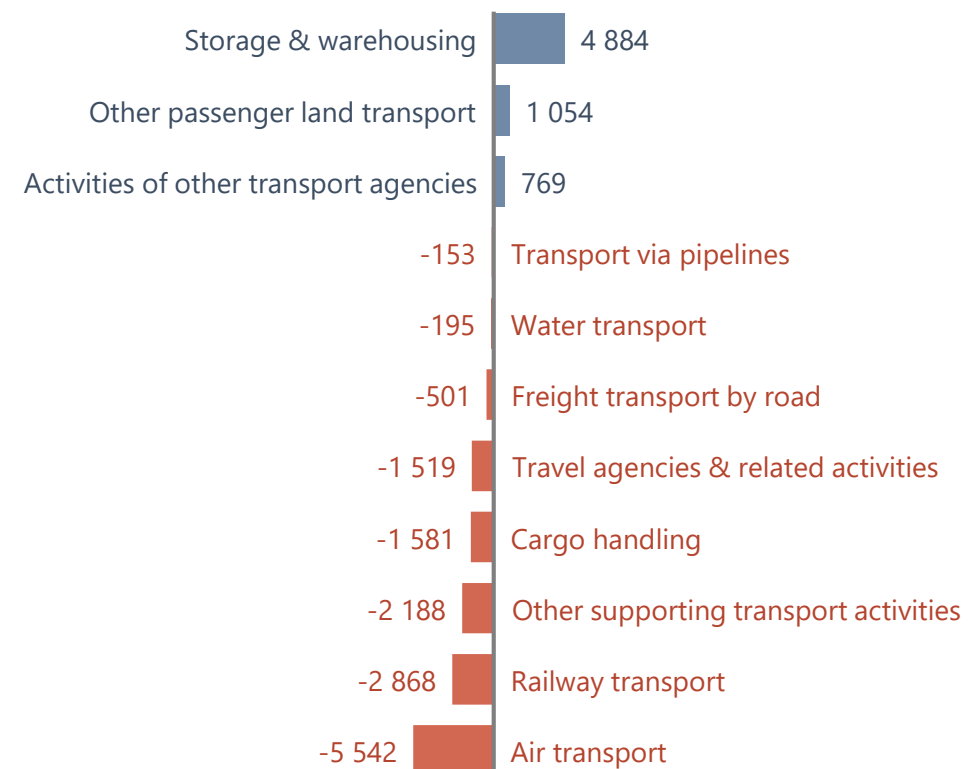
2013–2023

Industry gained 19 655 jobs overall



2019–2023

Industry lost 7 840 jobs overall



Source: Table D



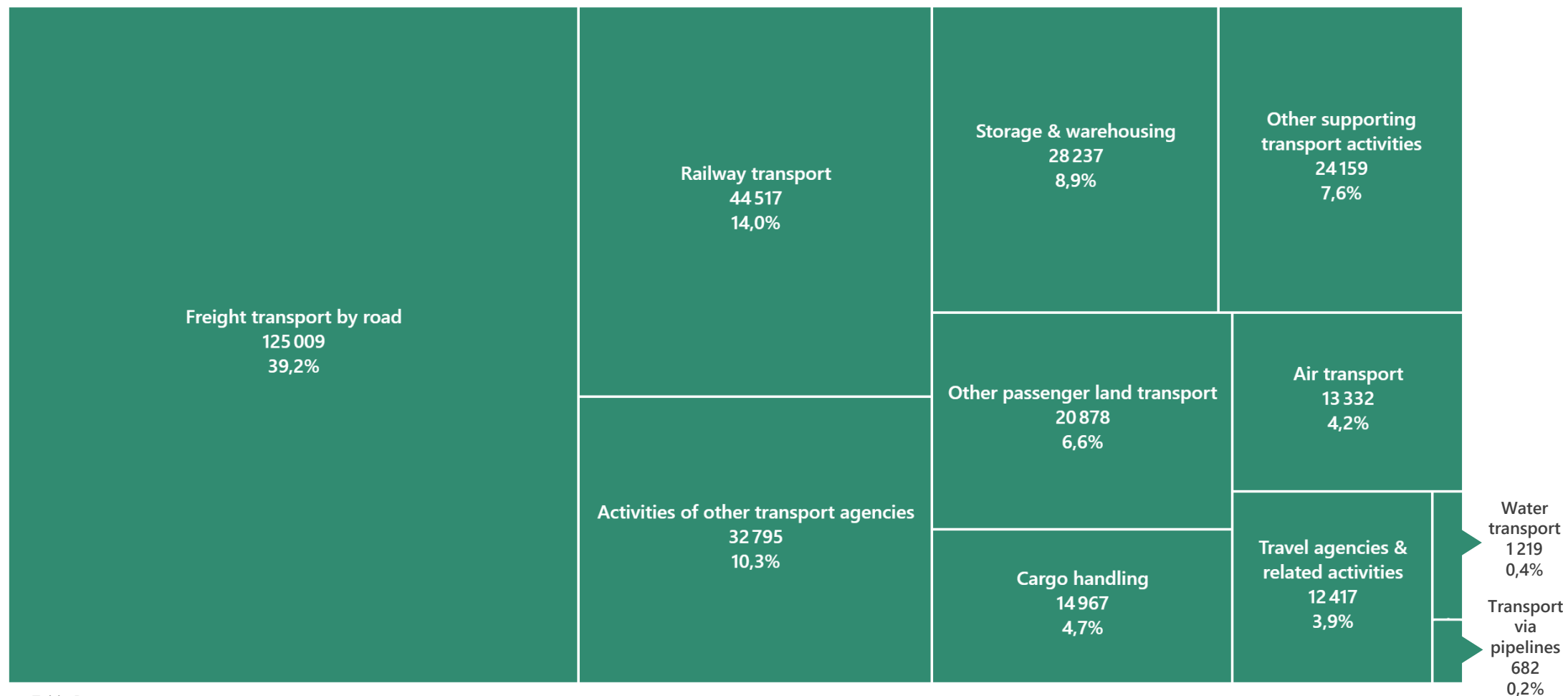
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Freight transport by road was the largest employer in 2023

Employment by type of activity in the transport & storage industry Total: 318 284 employees



Source: Table D



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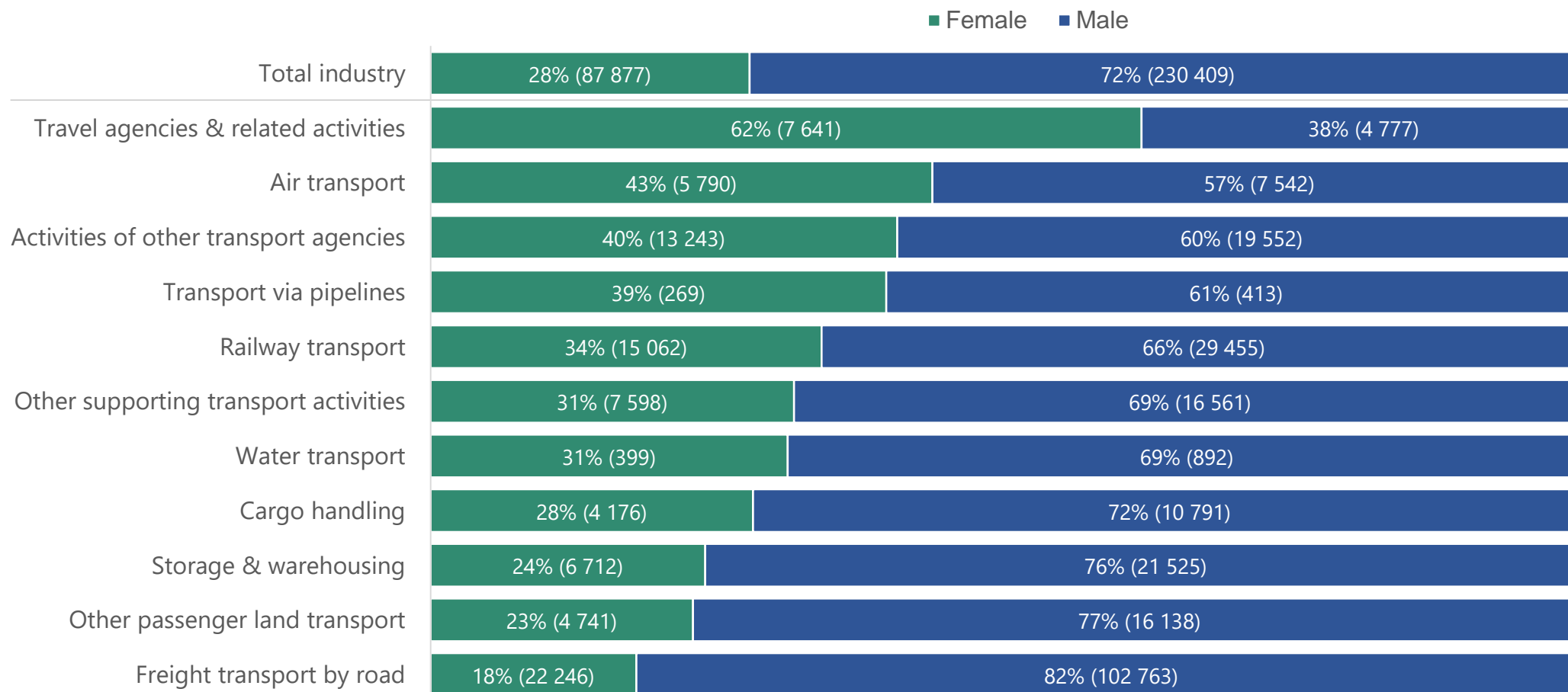
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Women occupied **28%** of jobs in the transport & storage industry

Employment by type of activity and gender, 2023



Source: Table 12



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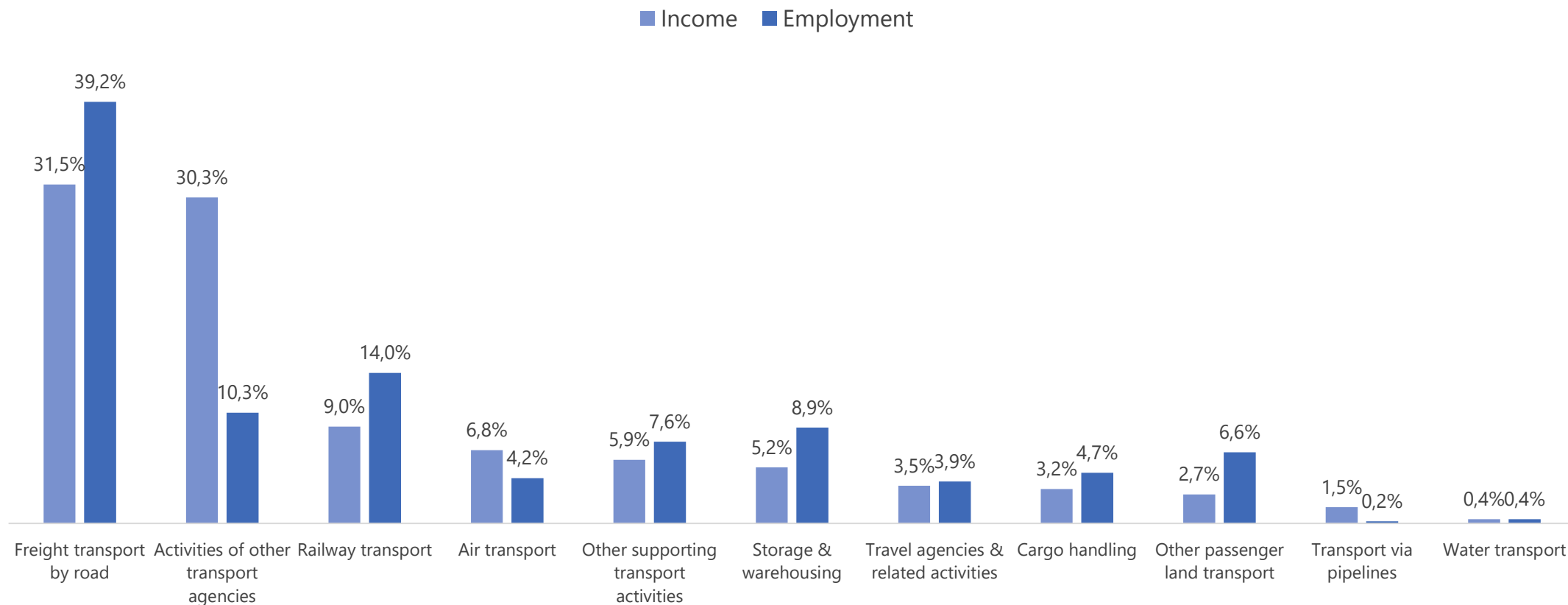
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Freight transport by road accounted for **31,5%** of income and **39,2%** of employment

Percentage contribution of income and employment by type of activity in the transport & storage industry, 2023



Source: Figure 1



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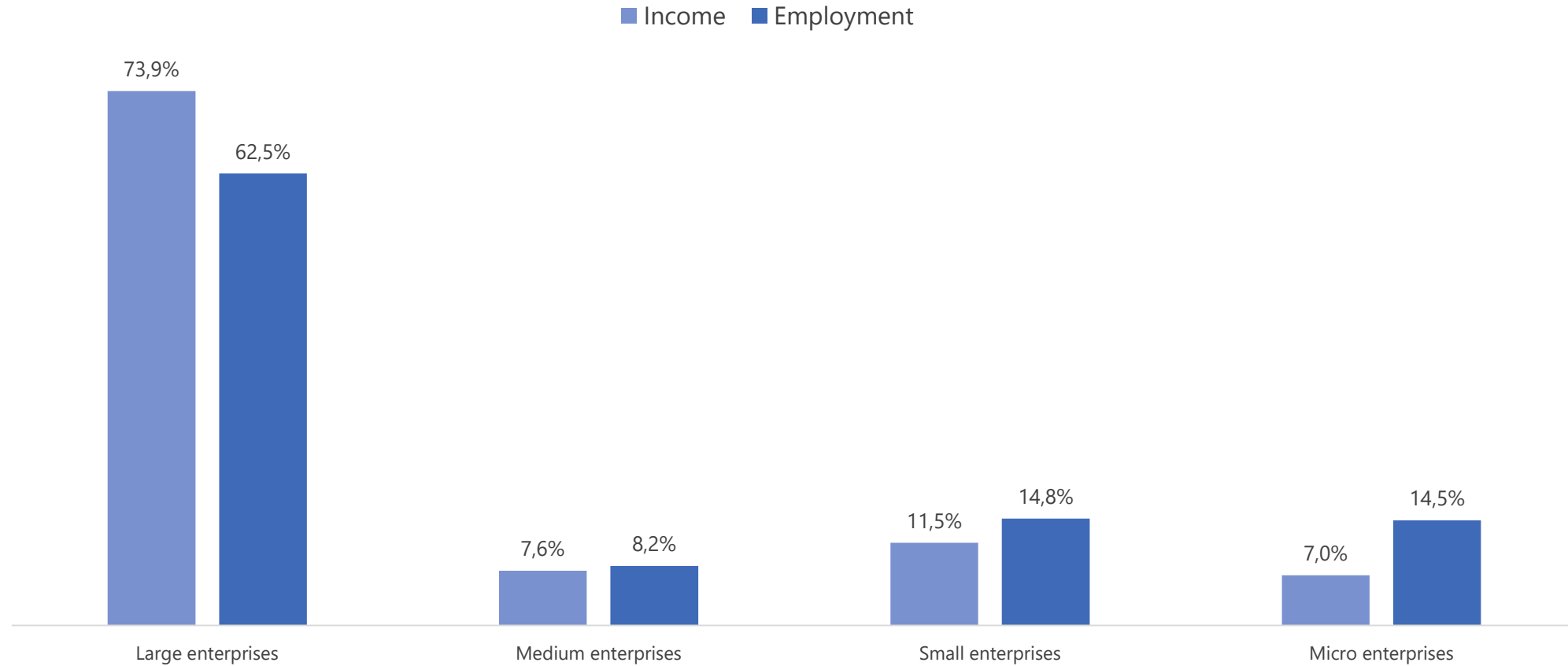
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SMMEs accounted for **26,1%** of income and **37,5%** of employment

Percentage contribution of income and employment by enterprise size, 2023



Source: Figure 2



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Breakdown of income from services rendered: **Railway transport activities**

Total: R37,3 billion



Source: Table 15



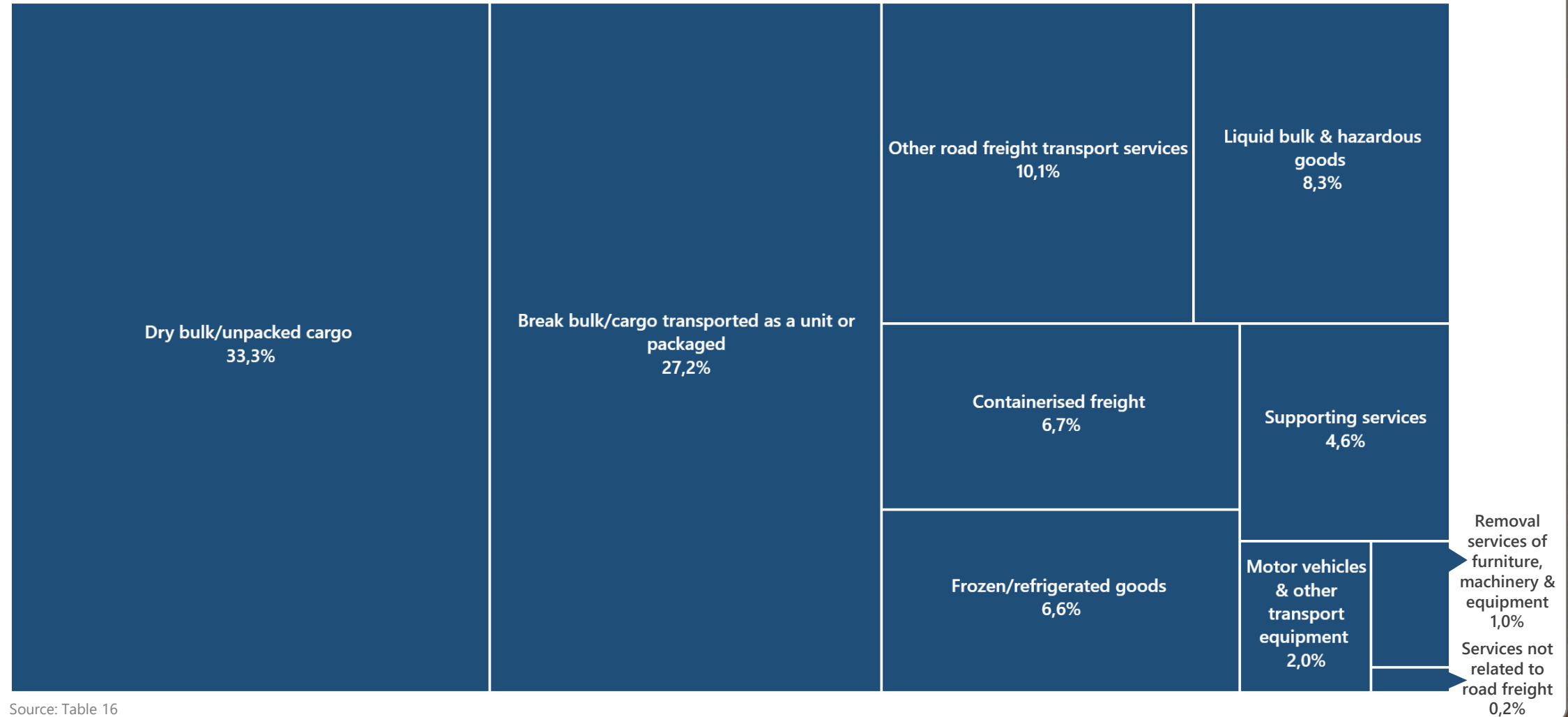
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Breakdown of income from services rendered: Road freight transport activities

Total: R217,7 billion



Source: Table 16



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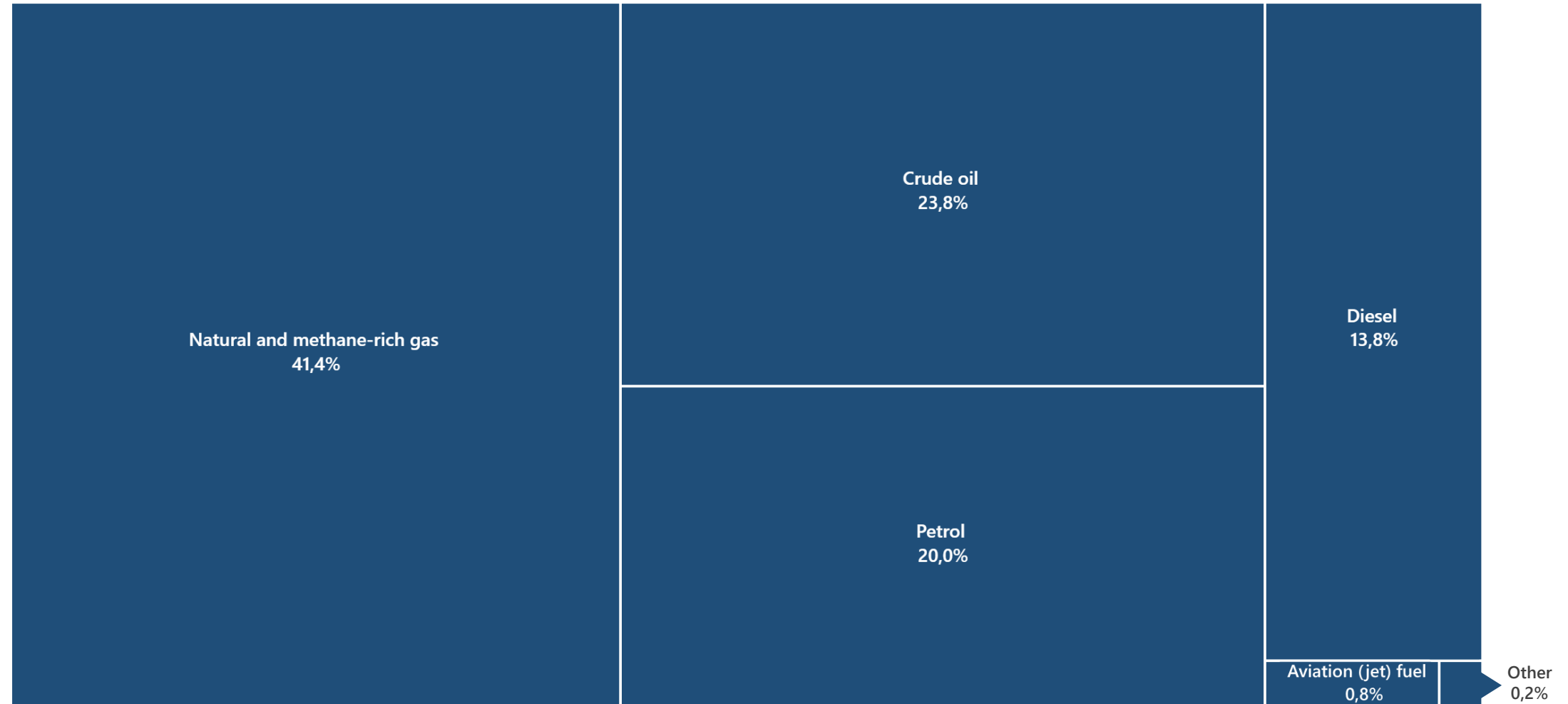
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Breakdown of income from services rendered: **Pipeline transport activities**

Total: R10,5 billion



Source: Table 17



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Breakdown of income from services rendered: **Air transport**

Total: R45,1 billion



Source: Table 18



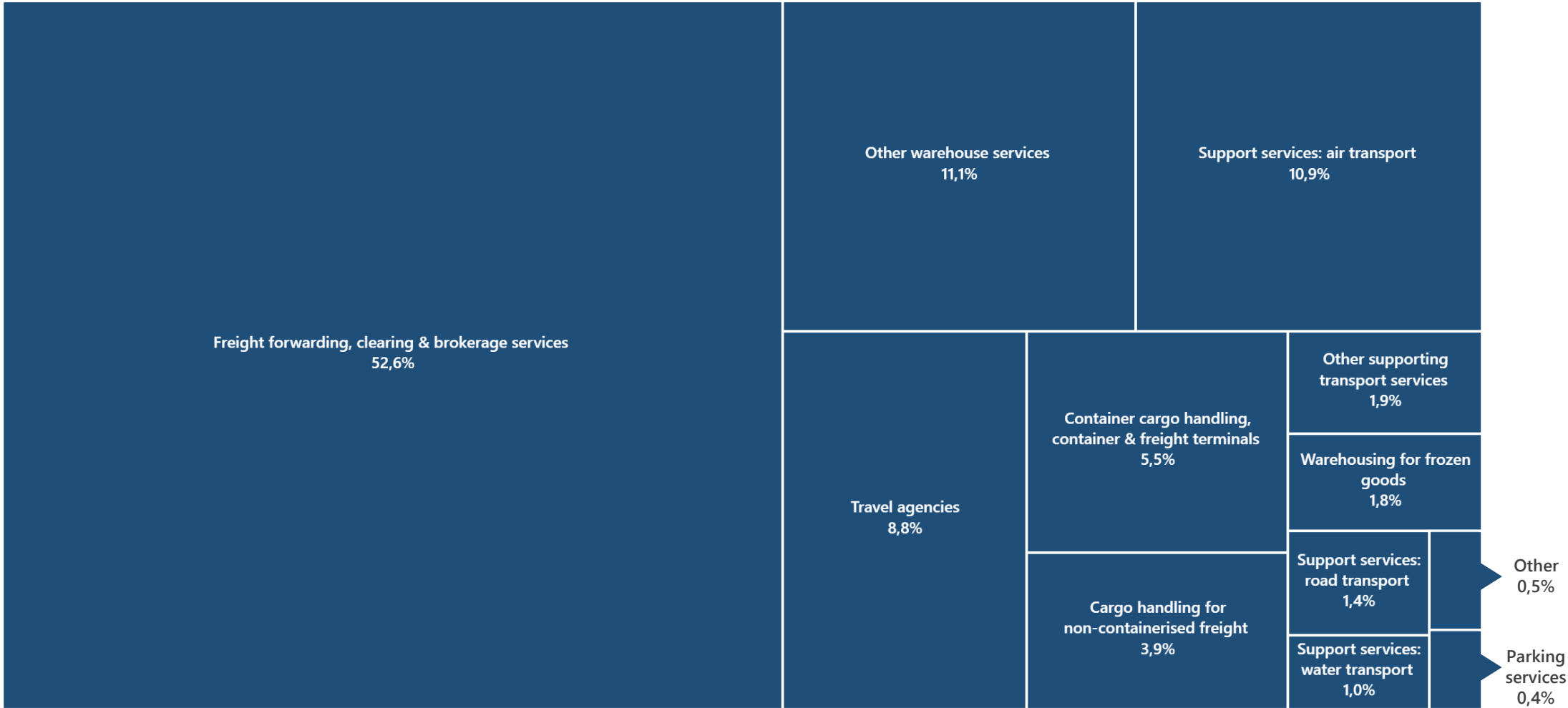
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Breakdown of income from services rendered: **Supporting and auxiliary transport activities**

Total: R290,8 billion

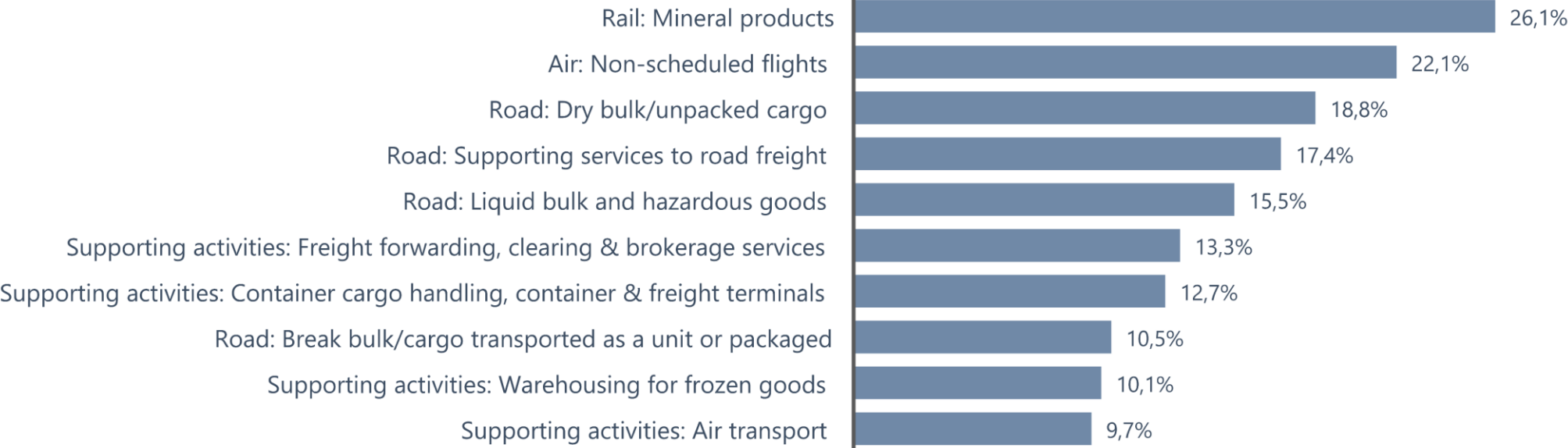


Source: Table 19



The rail transport of mineral products recorded the most significant rise in the 2019–2023 period

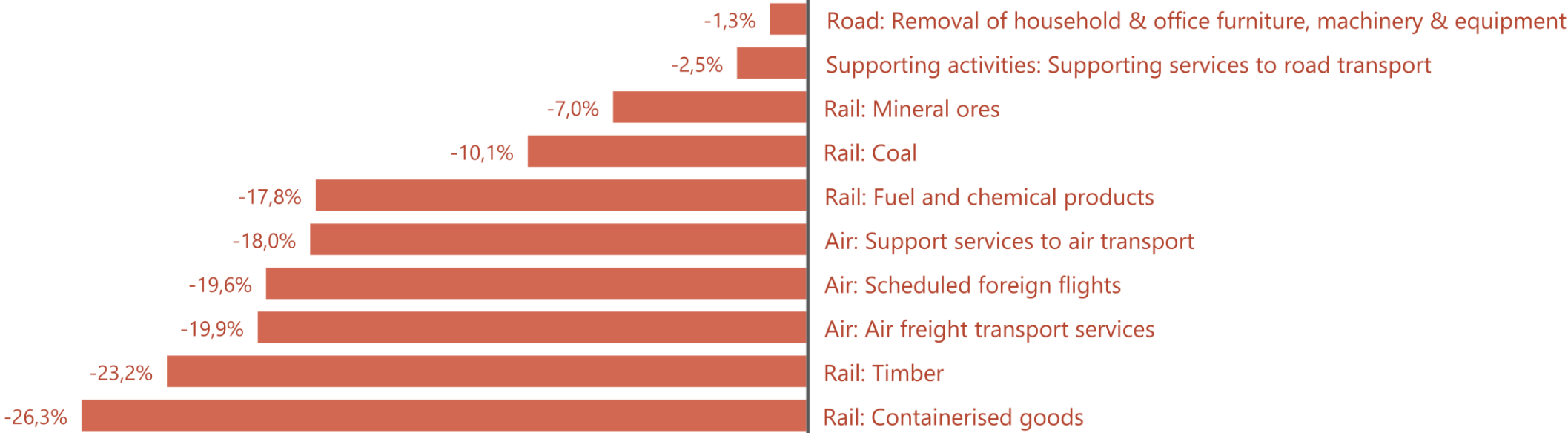
Services that recorded the largest **increases** in income from services rendered
Annualised percentage change



Excludes 'other' categories Source: Tables 15–19

Rail transport of containerized goods recorded the most significant decline in the 2019–2023 period

Services that recorded the largest **decreases** in income from services rendered
Annualised percentage change



Excludes 'other' categories Source: Tables 15–19



Provincial
estimates



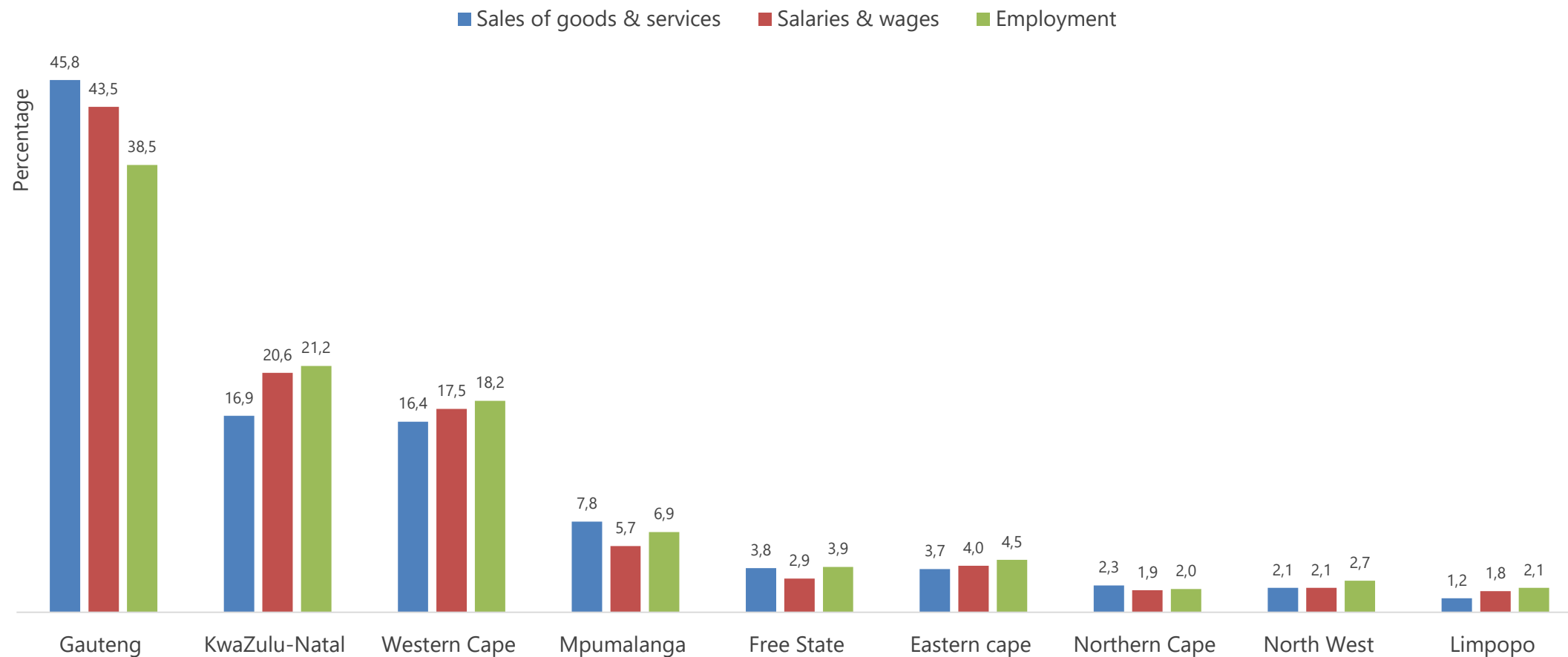
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Gauteng, KwaZulu-Natal and Western Cape are the most influential provinces

Provincial contributions to sales of goods & services, salaries & wages and employment



Source: Source: Tables 23–25



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Overview (2023)

- The industry generated R717 billion in income, representing a rise of 7,2% per annum since 2019.
- Freight transport by road was the most significant contributor to both income and employment in 2023.
- The overall profit margin for the transport & storage industry has declined since 2013.
- In 2023, railway transport recorded a financial loss.
- The industry has become less concentrated.
- Employment in the transport & storage industry recorded a decline in both the 2019 and 2023 surveys.
- Travel agencies, other supporting transport activities, air transport and railway transport lost jobs in 2023 compared with 2013.
- In 2023, women occupied 28% of jobs.



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Thank you!

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