

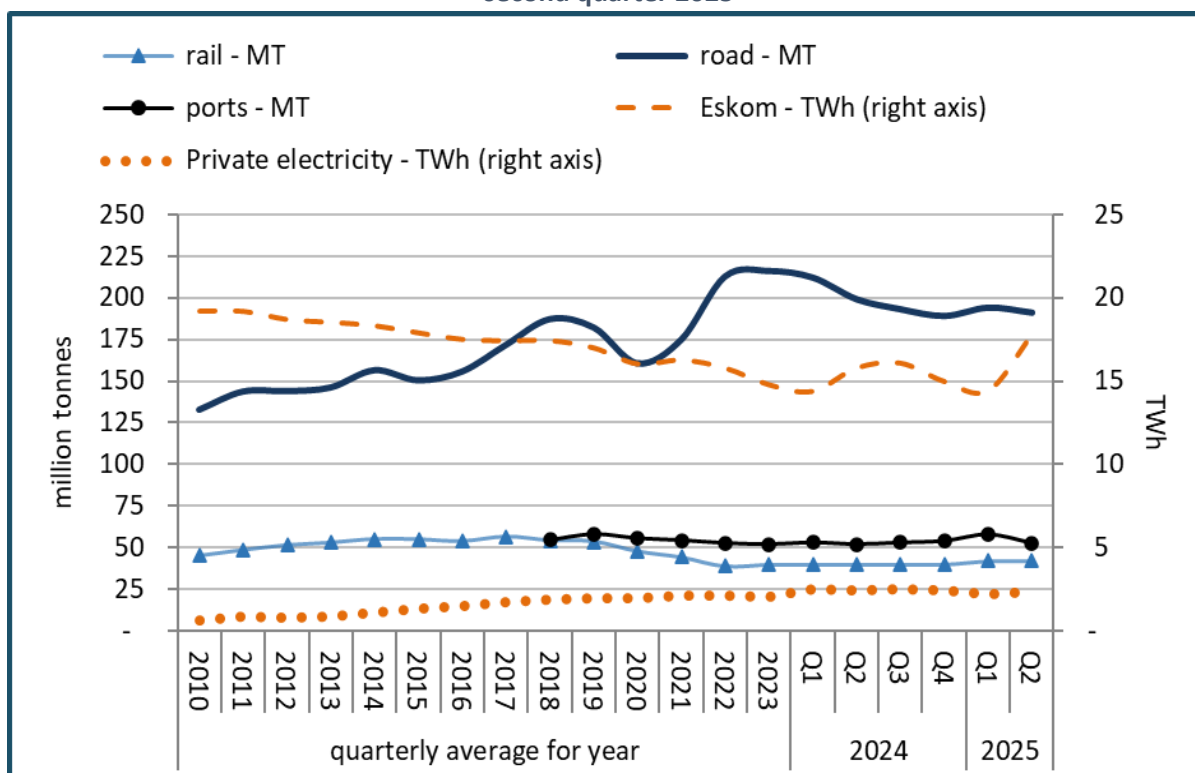
Infrastructure

The second quarter of 2025 saw a sharp uptick in Eskom generation, although it remains low compared to a decade ago. Freight transport has inched down over the past year, reflecting slow overall growth. There was, however, a small shift from road to rail as Transnet freight recovered modestly.

Infrastructure indicators show mixed results for the year to the second quarter of 2025. (Graph 10). Grid electricity is up by almost 2 TWh, almost entirely due to a 1.96 TWh jump in Eskom's supply. The increase in production by the national utility meant it almost returned to 2010 levels of output. It was partially offset by a small (0.05 TWh) reduction in supply to the grid from private generators.

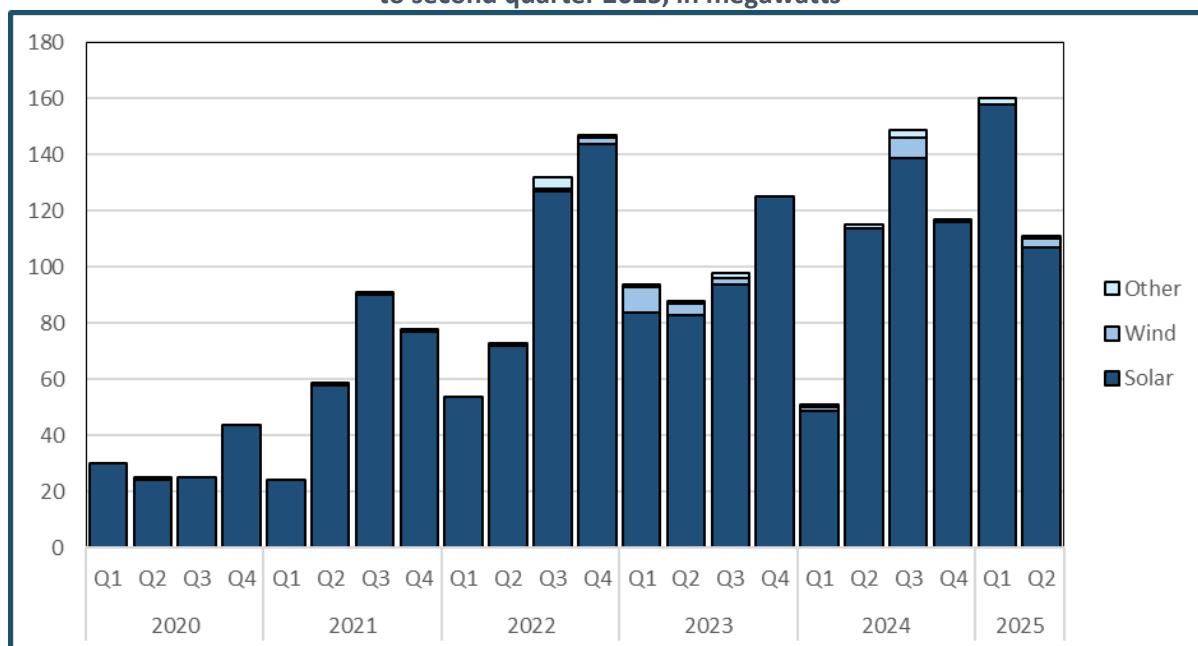
Transnet's rail tonnage was unchanged on a quarterly basis but increased two million tonnes over the past year. It reached 42 million tonnes at the end of the second quarter of 2025. In the same period, road freight fell eight million tonnes, or 4%, from 199 million tonnes to 191 million tonnes. Payload through the ports increased 1% over the year, but fell 9% on a quarterly basis, from 58 million tonnes to 53 million tonnes. Overall, payload moved within South Africa and through the ports was five million tonnes lower at the end of the second quarter of 2025 than it was a year earlier. While there is no data on off-grid generation, registrations of off-grid capacity show no sign of slowing down. (Graph 11) Total off-grid capacity registered annually with The National Energy Regulator of South Africa (NERSA) doubled after loadshedding escalated from mid-2022 compared to the previous two years. From the third quarter of 2022 to the second quarter of 2025, over 1.3 MW was registered with NERSA, but generation is typically lower. Almost all new off-grid capacity registered used solar power.

Graph 10: Road, rail, and ports tonnage (in million tonnes) and Eskom and other grid suppliers' electricity available (in TWh), 2010 to 2023 (quarterly average for year), first quarter 2024 to second quarter 2025



Source: Statistics South Africa. Electricity generated and available for distribution. Excel spreadsheet; and Land Transport Survey. Excel spreadsheet. For ports, Transnet National Ports Authority. Port Statistics. Webpage.

Graph 11: Off-grid capacity registered with NERSA by type, quarterly from 2020 to second quarter 2025, in megawatts



Source: Calculated from NERSA. Registered generation database. Excel spreadsheet. Downloaded from <https://www.nersa.org.za/electricity/registration> in September 2025.