

Infrastructure

Both electricity and freight transport stagnated in the year to the third quarter of 2025. Eskom saw a 4% decline in output, although it remained 4% higher than in the third quarter of 2023. Private generation for the national grid was essentially the same as a year earlier.

Over the year to the third quarter of 2025, Eskom lost half of the substantial gains it made in 2024. In the preceding year, it increased its output by 8%. In the year to the third quarter 2025, it dropped back by 4%. As a result, while output in the third quarter of 2025 was still 4% higher than it was in the same quarter in 2023, it was close to 20% lower than at its third quarter peak in 2007. The combination of soaring tariffs combined with loadshedding and other restrictions on electricity use have led to slower but also less electricity growth, with greater efficiency in electricity use, the downsizing of energy-intensive production lines, and some migration away from the national grid.

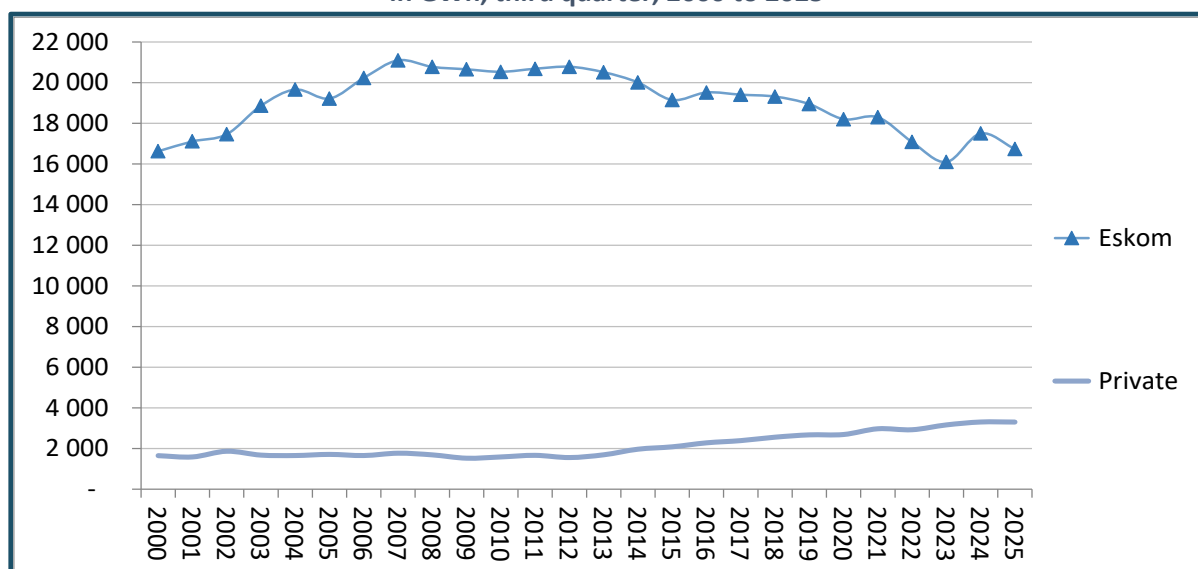
Private generation for the national grid dipped sharply at the start of 2025, but had almost recovered in the third quarter. The decline in the first quarter resulted largely from disagreements with Eskom around payment for new transmission lines. Still, in the third quarter of 2025, private generation was some 86% higher than in 2007. (Graph 10) The private contribution to grid electricity increased from under 10% before 2015 to 17% in the third quarter of 2025.

Investment in off-grid capacity was expected to accelerate in 2025, according to projections by the National Energy Regulator of South Africa (NERSA). Based on registrations in the second and third quarters of 2025, it expected total registered off-grid capacity to increase by 5.5 gigawatts in 2025, for a total of 16 gigawatts. Most off-grid capacity is solar, however, which means its actual generation is around a quarter of its installed capacity. NERSA expected a total of around 450 new projects in 2025, at an average cost of R275 million, up from under R200 million apiece for a similar number in 2024.

While both rail and freight transport grew only slowly, the shift from rail to road persisted. Rail freight increased by 0.9% for the year, and road freight by 1.4%. That left rail freight 25% below its 2014 peak, following a gradual decline over the past decade. Road freight has been more volatile, especially following the 2020 COVID-19 pandemic. In the third quarter of 2025, it was almost 10% higher than in 2019, before the pandemic. Freight through the ports has recovered to pre-pandemic levels.

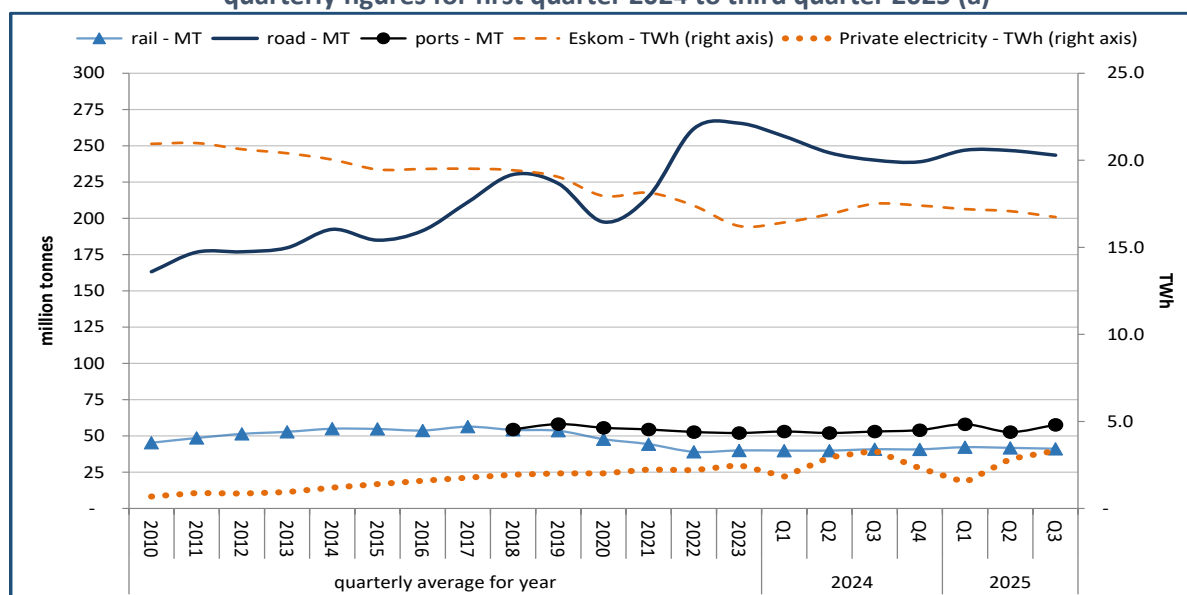
Graph 11 summarises trends in electricity and freight services.

Graph 10. Monthly average electricity generation by Eskom and other suppliers, in GWh, third quarter, 2000 to 2025



Source: Calculated from Statistics South Africa. Electricity generated and available for distribution. Excel spreadsheet. Accessed at www.statssa.gov.za in November 2025

Graph 11. Road, rail, and ports payloads (in million tonnes) and Eskom and other grid suppliers' electricity produced (in TWh), 2010 to 2023, quarterly average for year from 2010 to 2023 and quarterly figures for first quarter 2024 to third quarter 2025 (a)



Note: (a) Figures for rail and road freight are seasonally adjusted; electricity and ports figures are actuals.
Source: Statistics South Africa. Electricity generated and available for distribution. Excel spreadsheet accessed at www.statssa.gov.za in November 2025; and Land Transport Survey. Excel spreadsheet. For ports, Transnet National Ports Authority. Port Statistics. Webpage. Accessed at