



To determine corridor freight for the N1, N2 and N7, the districts of South Africa are divided into five (5) zones, of which the first four are illustrated in Figure 1:

1. N1 Corridor;
2. N2 Corridor;
3. N7 Corridor;
4. Core Western Cape (districts within which freight movements are not considered to be on any of the national corridors);
5. Metropolitan (a combination of the Cape Town Metropolitan area and its peripheral areas); and
6. Non-corridor (any freight movement not clustered according to the cluster rules)

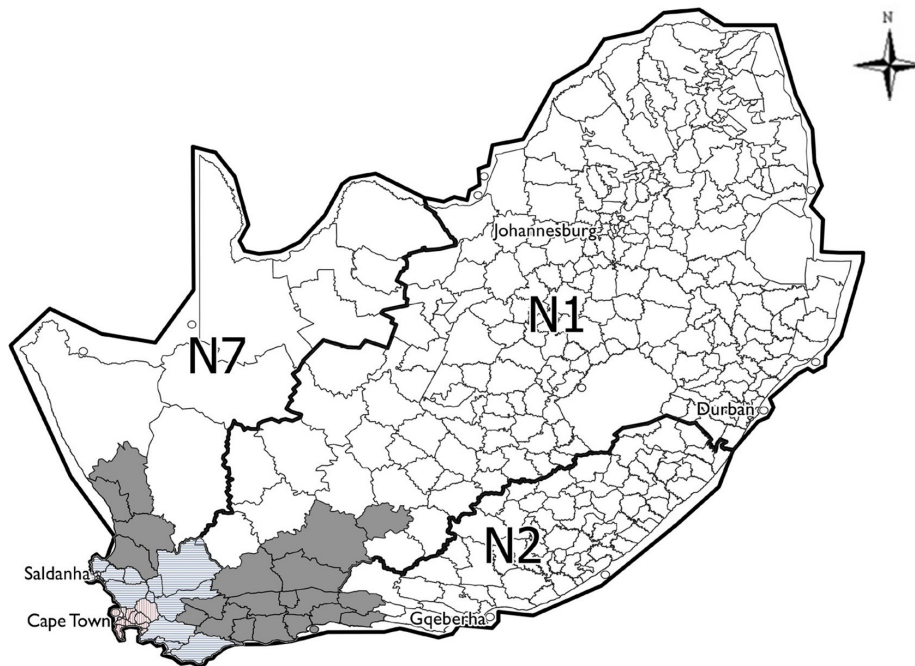


Figure 1: Corridor definitions for Western Cape freight

As shown in Figure 2, freight in the Core Western Cape zone is further sub-divided into Cape Town Metropolitan freight.

The Cape Town Metropolitan (Zone 5) freight is defined as freight that has its origin and destination inside the metropolitan areas.

The Origin-Destination (OD) pairs are clustered into corridors by applying the following rules:

Cluster rules

- If the origin and destination are both within either the N1, N2 or N7 zones, the OD pair is assigned to that corridor.
- If the origin and destination are within different corridor zones, the OD pair is not assigned to a corridor.
- If the origin and destination are both within the core Western Cape zone, the OD pair is not assigned to a corridor.
- If either the origin or destination is within the core Western Cape zone, the OD pair is assigned to the corridor zone in which the non-core Western Cape origin or destination is.

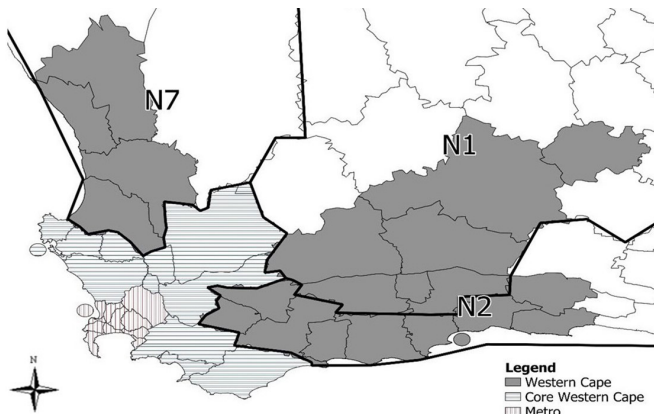


Figure 2: OD pairs for Cape Town Metropolitan freight

Table 1 provides total road and rail freight in tonnes and tonne-kms, with the percentage split for each, per zonal grouping.

Table 1: Total road and rail freight in tonnes and tonne-kms per zone (2024)

Zonal Grouping	Total tonnes			Total tonne-kms		
	Road tonnes (million) (% of zone freight)	Rail tonnes (million) (% of zone freight)	Total (million)	Road tonne-kms (billion) (% of zone freight)	Rail tonne-kms (billion) (% of zone freight)	Total (billion)
N1 Corridor traffic	29.9 (99.8%)	0.1 (0.2%)	30.0	41.4 (99.8%)	0.1 (0.2%)	41.4
N2 Corridor traffic	9.0 (99.8%)	0.02 (0.2%)	9.1	5.6 (99.8%)	0.01 (0.2%)	5.6
N7 Corridor traffic	4.2 (7.0%)	55.6 (93.0%)	59.8	2.4 (4.4%)	51.3 (95.6%)	53.7
Metropolitan traffic	27.1 (99.7%)	0.1 (0.3%)	27.2	0.6 (99.1%)	0.01 (0.9%)	0.6
Core Western Cape	8.9 (98.2%)	0.2 (1.8%)	9.0	0.6 (97.4%)	0.02 (2.6%)	0.7
Non-corridor traffic	9.1 (99.7%)	0.02 (0.3%)	9.2	10.3 (99.7%)	0.04 (0.3%)	10.4
Total	88.3 (61.2%)	55.9 (38.8%)	144.2	60.8 (54.2%)	51.5 (45.8%)	112.3

Table 2 provides total GFB¹ road and rail freight in tonnes and tonne-kms, with the percentage split for each, per zonal grouping.

Table 2: GFB road and rail freight in tonnes and tonne-kms per zone (2024)

Zonal Grouping	GFB tonnes			GFB tonne-kms		
	Road tonnes (million) (% of zone freight)	Rail tonnes (million) (% of zone freight)	Total (million)	Road tonne-kms (billion) (% of zone freight)	Rail tonne-kms (billion) (% of zone freight)	Total (billion)
N1 Corridor traffic	29.7 (99.8%)	0.1 (0.2%)	29.8	41.4 (99.8%)	0.1 (0.2%)	41.4
N2 Corridor traffic	8.1 (99.8%)	0.02 (0.2%)	8.2	5.5 (99.8%)	0.01 (0.2%)	5.5
N7 Corridor traffic	2.9 (85.1%)	0.5 (14.9%)	3.5	1.2 (83.0%)	0.2 (17.0%)	1.4
Metropolitan traffic	8.2 (99.1%)	0.1 (0.9%)	8.3	0.2 (97.8%)	0.01 (2.2%)	0.2
Core Western Cape	6.5 (97.5%)	0.2 (2.5%)	6.7	0.5 (96.6%)	0.02 (3.2%)	0.5
Non-corridor traffic	8.7 (99.7%)	0.02 (0.3%)	8.7	10.3 (99.6%)	0.04 (0.4%)	10.3
Total	64.2 (98.7%)	0.9 (1.3%)	65.1	59.1 (99.4%)	0.4 (0.6%)	59.5

Table 3 displays the GFB freight, excluding domestic iron ore and coal.

Table 3: GFB (also excluding domestic iron ore and coal) road and rail freight in tonnes and tonne-kms per zone (2024)

Zonal Grouping	GFB (also excluding domestic iron ore and coal) tonnes			GFB (also excluding domestic iron ore and coal) tonne-kms		
	Road tonnes (million) (% of zone freight)	Rail tonnes (million) (% of zone freight)	Total (million)	Road tonne-kms (billion) (% of zone freight)	Rail tonne-kms (billion) (% of zone freight)	Total (billion)
N1 Corridor traffic	28.8 (99.8%)	0.1 (0.2%)	28.9	40.0 (99.8%)	0.1 (0.2%)	40.1
N2 Corridor traffic	8.1 (99.8%)	0.02 (0.2%)	8.1	5.5 (99.8%)	0.01 (0.2%)	5.5
N7 Corridor traffic	2.8 (84.5%)	0.5 (15.5%)	3.3	1.1 (82.8%)	0.2 (17.2%)	1.4
Metropolitan traffic	8.2 (99.1%)	0.1 (0.9%)	8.3	0.2 (97.8%)	0.01 (2.2%)	0.2
Core Western Cape	5.8 (97.2%)	0.2 (2.8%)	6.0	0.5 (96.7%)	0.02 (3.3%)	0.5
Non-corridor traffic	7.8 (99.9%)	0.01 (0.1%)	7.8	9.2 (99.9%)	0.005 (0.1%)	9.2
Total	61.5 (98.6%)	0.9 (1.4%)	62.4	56.6 (99.4%)	0.3 (0.6%)	56.9

¹ GFB is defined as the competitive market consists of the total freight tonnes less iron ore exports, manganese exports, pipelines and, for the analysis that follows, stone and aggregate. The latter has been removed from the subsequent GFB analysis because it is typically a very short-distance movement of mostly construction aggregate, which is challenging to quantify and has extremely dispersed transport.

When compared to volumes of previous years, the rail tonnages on the N1 and N7 corridors show a general decrease - with the exception being maize, which saw an increase of 4 816 tonnes within the N7 zonal grouping. GFB freight has also seen a general decline in rail tonnages with the N1, N2 and N7 decreasing by 1.5%, 1.1% and 9.9% respectively. The Metropolitan and Core corridors saw a decline of 0.3% and 3.3% in rail tonnages compared to 2023 figures, respectively. The tonne-km view confirms a smaller rail market share, indicating that longer distance freight is increasingly being transported by road. This indicates that a long-distance market exists that could potentially benefit from rail's economies of scale, provided that rail operators can offer a competitive service.

Table 4 shows the breakdown of GFB (excluding road domestic iron ore and coal) road freight per zone. Note that 46.8% of this freight travels on the N1 road corridor, with an average distance travelled of 1 388 km.

Table 4: GFB (excluding road domestic iron ore and coal) road freight per zone (2024)

Zonal Grouping	Road tonnes (million)	Percentage of road traffic	Average Travel Distance (km)
N1 Corridor traffic	28.8	46.8%	1 388
N2 Corridor traffic	8.1	13.2%	679
N7 Corridor traffic	2.8	4.6%	405
Metropolitan traffic	8.2	13.3%	28
Core Western Cape	5.8	9.5%	87
Non-corridor traffic	7.8	12.7%	1 176
Total	61.5	100.0%	

Highlights

- For total freight touching the Western Cape, the N7 is the only corridor with significant rail volumes. However, this is primarily due to the dedicated iron ore corridor (i.e. iron ore and manganese exports).
- Corridor GFB freight is dominated by road, with: 99.8% market share on the N1 corridor; 99.8% market share on the N2 corridor and 85.1% market share on the N7 corridor.
- The average travel distance of road freight on the N1, N2, N7, Metropolitan and Core Western Cape corridor is 1 388 km, 679 km, 405 km, 28 km and 87 km respectively.
- Due to the low rail market share, modal shift opportunities exist for long-distance road freight in the Western Cape (more detail in Scenario 1: Modal shift).