



## GARRY'S MESSAGE

When it comes to industry statistics . . .  
*"You pays yer money and you takes yer choice"*  
We all know it's mission impossible to obtain verifiable figures regarding the size of our express logistics market.

Service providers naturally enough conserve private volume statistics so there is no way we can aggregate the parcels moving. Not only that, but annual reporting focuses on financial and strategic issues, not operational data.

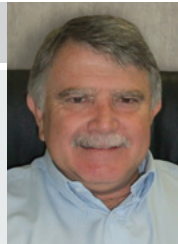
University students and industry observers have tried and failed to come up with the answers. On this page, we indicated some reports that estimate the numbers and may be of interest.

In their report, The Independent Communications Authority of South Africa lamented "We had low response rate from unreserved postal sector". So even ICASA can't get a fix on it.

While it would be helpful to have a reliable current measurement, the future is always uncharted territory. So management has to consult their own experiences and client feedback to schedule resources needed for the years ahead.

One thing strategists can rely on is higher volumes, especially from online purchases. There will also be increased competition as we have seen in recent months. We are in the rapid growth period of our industry and companies are looking for pickings. So to cope we will need more investment in terms of systems, skilled people, physical equipment and automation and the disciplines that serve compliance and security.

Exciting times ahead.



Garry Marshall

A handwritten signature in black ink that reads "Garry".

## Parcel Mania

The South African Courier, Express and Parcel market (CEP) is estimated at around R 38 billion (\$207,96 million) expected to grow to R58 billion (\$316,28 million) by 2030, according to Mordor Intelligence.

The report says the number of e-commerce users is expected to reach 33 million by next year.

Who owns whom Research WOW report indicates that CEP revenue in South Africa was estimated at R44bn in 2022 and is expected to grow to R60bn by 2027.

<https://www.mordorintelligence.com/industry-reports/south-africa-courier-express-and-parcel-cep-market/market-size>

<https://www.whoownswhom.co.za/courier-services-industry-south-africa-driven-by-market-shifts-and-new-technology/#courier-industry-south-africa>

### Global

According to marketresearch.com, the global market for Courier, Express & Parcel Services estimated at US\$471.1 Billion in the year 2023, is expected to reach US\$722.6 Billion by 2030.

Statista.com says CEP companies in the United States delivered over 19.5 billion parcels in 2022, generating \$136.6 billion in revenue.



Photo by Claudio Schwarz

Pitney Bowes indicates US parcel volumes reached 21.65 billion shipments in 2023. That's over five parcels per month per person.

Projections suggest the total reaching 29 billion in five years.

<https://www.marketresearch.com/Global-Industry-Analysts-v1039/Courier-Express-Parcel-Services-36895498/>

<https://www.statista.com/topics/4063/courier-express-and-parcels-cep-market-in-the-united-states/#topicOverview>

Pitney Bowes Parcel Shipping Index.



# Skills Development

## BBBEE

SAEPA has received a reply from the BEE Council: 'currently the council is going through the comments that were received and considering them while drafting the codes to go for section 9(5)'.

## TETA Transport Education Training Authority (TETA) Sector Skills Plan (SSP) 2025/26 Focus Groups

TETA invited stakeholders from within the Transport sector to a SSP Stakeholder Consultative Workshop, as part of a process of updating the SETA's implementation of the National Skills Development Plan.

SAEPA participated in the focus groups held with the Road Freight and Forwarding & Clearing sub-sectors during May.

## Legacy Qualifications: Registration end date 30 June 2024

As reported previously, SAEPA and its Subject Matter Experts have been consulting with TETA and the Quality Council for Trades and Occupations (QCTO) to review existing Occupational Certificates which are expiring and to develop new Occupational Certificates required in the sector.

To the right is a list of the inputs made by SAEPA to the TETA ETQA (Education & Training Quality Assurance) regarding qualification requirements for the industry.

We have been advised by Sandy Ndlovu the ETQA Manager at TETA that TETA has consolidated all feedback received and there will be follow-up meetings scheduled for discussions with each Chamber. These are planned for July/August 2024 after the learner enrolment deadline of 30 June 2024. All stakeholders will be invited to the Chamber follow-up meeting to map a way-forward on the qualifications.

## SAEPA Feedback Legacy vs Occupational Qualifications

Legacy Qualification	Qualification Update
59300 - General Education and Training Certificate: Transport NQF 1	No OC developed yet. Require international trade qualification at NQF 1.
50285 - National Certificate: Professional Driving NQF 3	93793 - Occupational Certificate: Truck Driver NQF 3 only applicable to driver with a GVM >3500kg
	Industry requires occupational qualifications for OFO 2021-732101 Delivery Driver Specialisation: Light Utility Vehicle (LUV) Driver; Van driver with various specialisations within this specialisation
	OC required for: OFO 2021-732102 Delivery Driver (Motorcycle) (Last Mile Logistics)
	OC required for: Tuk-tuk drivers – no OFO code
57831 - National Certificate: Freight Handling NQF 3	96396 - Occupational Certificate: Freight Handler NQF 3
48437 - National Certificate: Road Transport NQF 3	Newly developed Road Transport Clerk NQF 3
59365 - National Certificate: Freight Forwarding and Customs Compliance NQF 3	No OC developed
59298 - Further Education and Training Certificate: Freight Forwarding and Customs Compliance NQF 4	Newly developed National Occupational Certificate: International Trade Administrator NQF 4
48439 - Further Education and Training Certificate: Road Transport Supervision NQF 4	94025 - Occupational Certificate: Transport Clerk NQF 4
65529 - Further Education and Training Certificate: Transport Operations NQF 4	
No legacy qualification	96368 - Occupational Certificate: Clearing and Forwarding Agent NQF 5
74149 - National Certificate: Supply Chain Management NQF 5	110942 - Occupational Certificate: Supply Chain Practitioner NQF 5
58473 - National Diploma: Freight Handling Logistics NQF 5	Newly developed Occupational Certificate: Logistics Practitioner NQF 5
61489 - National Certificate: Transport Operations NQF 5	96371 - Occupational Certificate: Road Transport Manager NQF 5
57957 - National Certificate: Export Administration NQF 5	No OC developed
No legacy qualification	Transport Operations NQF 6
59304 - National Diploma: Freight Forwarding and Customs Compliance NQF 5	No OC developed
No legacy qualification	102499 - Occupational Certificate: Customs Compliance Manager NQF 7
No legacy skills programme	Skills programme required 4IR in Transportation, Logistics and Supply Chain (including AI)

## Employment Equity Amendment (Gazette 50058)

SAEPA made its submission on 2 May 2024. Should a member require a copy of SAEPA's submission please contact [martine@saepa.org.za](mailto:martine@saepa.org.za)

# IATA WINGS OF CHANGE

The International Air Transport Association (IATA) Wings of Change Focus Africa Conference (WOCFA) will take place on 2-3 July 2024 with South African Airways as the host airline. The venue is Marriott Hotel, Melrose Arch Johannesburg.

## Air Cargo

### Unlocking Africa's Trade Potential

IATA's Presentation on Air Cargo Economics, followed by a panel discussing how the African continent is preparing for managing growth through digitalisation, simplified borders, and focusing on key segments such as perishables, live animals, and pharmaceuticals.

It will also examine key topics influencing Cargo Operations, Safety and Security.

Moderated by Kashif Khalid – Regional Director Operations, Safety & Security, IATA, Sanjeev Ghadia – Chief Executive Officer, Astral Aviation, David King – Head of Aviation, Wesgro and Dick Murianki – Director Cargo, Kenya Airways.

<https://www.iata.org/en/events/all/wings-of-change-focus-africa>



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**IATA WINGS OF CHANGE FOCUS AFRICA**

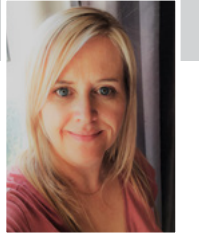
Johannesburg, South Africa  
2-3 July 2024

**JOIN ME AT WOCFA 2024!**

#IATAWOCFA

**IATA**





# “It’s OK not to be OK”

What should you keep an eye out for now that we are in the last month of Autumn? What disrupters have we maybe overlooked?

While busy striving to achieve budget we may be keeping our heads down to deliver on our targets. In doing so, we must take care not to lose sight of any emerging risks.

Let’s start by reminding ourselves that ours is a people business.

No sooner were we over the Easter peak than May brought us Mother’s Day with another spike in deliveries. Next up is Fathers Day, another busy run for the industry. Relentless pressure on performance.

Importantly, May is the month where globally there

is a focus on Mental Health Awareness. When better to reflect on our people and how they need to be equipped to cope with the fast-moving demands of express logistics.

Numerous campaigns highlight the importance of focusing on employee overall well-being. This is very relevant to all involved in the express logistics environment, where we often expect them to bear more responsibility and do more, sometimes with tighter resources.

SAEPA’s Wellness Express does an excellent job of helping our industry personnel stay healthy through its low-cost primary health care service. But how do they cope with stress and other personal challenges?

Consider the rising numbers of South Africans suffering from anxiety, depression and similar conditions. In a business where continuity is critical it’s vital to have plans in place to identify and assist anyone who may be experiencing problems. Having employees booked off owing to burnout or mental illness has the same disruptive effect as absent with physical illness.

We are tough characters in the express logistics game - we need to be. So people are less likely to admit if they are struggling. That’s why management needs to reassure them and communicate that there is no shame in being troubled and needing help.

Our people matter most and “It’s OK not to be OK”. Let’s make sure they know we care and that help is available.

Contact Nicole at [nicole@createnix.com](mailto:nicole@createnix.com)



Photo by Austin Distel



CELEBRATING SUPPLY CHAIN MANAGEMENT’S SHINING STARS

## You are invited!

Join us for a night of prestige, celebration, and inspiration at the Awards Evening for Africa Supply Chain Excellence. This event is a testament to the spirit of innovation that propels Africa’s supply chain profession forward.

- Date: 24th July 2024
- Venue: The Ballroom, Montecasino, Montecasino Boulevard, Fourways, Gauteng, South Africa
- Time: From 18:30 (Dinner begins at 19:00)
- Dress: Black Tie

The Africa Supply Chain Excellence Awards is an unparalleled opportunity to network with industry leaders, innovators, and professionals, and to honour those who have demonstrated exceptional performance, leadership, and creativity in the supply chain profession.

- Costs: For an individual: R 1,150 per person
- For a table of 10 R10,000 per table

Prices include a delicious 3 course meal with selected beers, wines and soft drinks as well as entertainment. All prices are quoted exclusive of VAT

To book your table please click on the link below:

[Awards Dinner | ASCEA – book now!](#)

We would be honoured by your presence at this fabulous event as we come together to acknowledge and celebrate the remarkable accomplishments of individuals and organisations shaping the future of supply chain management in Africa.

There will be online access to watch the awards for those who are unable to attend in person.

For all enquiries please contact the Event Secretariat at Upavon Management by email : [info@upavon.co.za](mailto:info@upavon.co.za) or telephone +27 11 023 6701

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Photo by visuals on Unsplash

# YOUR NATIONAL HEALTH SERVICE FROM SAEPA

*“... those with medical aid cannot discard them just yet ...”*

- Dr Joe Phaahla, Minister of Health

The NHI announced by the government is likely to be delayed for many years. Some experts doubt it will ever get off the ground. Meanwhile a National Health Service to meet your needs is available right now. And it's affordable.

Wellness Express is SAEPA's low-cost primary health care service for the express parcel industry which employees at all levels can afford. It offers primary health care, occupational health, psychiatry, advanced cardiac life support, advanced paediatric life support, HIV and AIDS management and

much more. Visits are unlimited and medication is provided.

Contact: Sharon Somerset, Wellness Express Manager [sharon@saepa.org.za](mailto:sharon@saepa.org.za)

## Stop Press!

Wellness Express is currently in negotiation with a service provider to add even more benefits to the service. Details in next month's edition of "News Delivery".

## SAPICS Annual Conference Century City Conference Centre. 9 – 12 June 2024

Clare Fincham reminds our members to participate in this leading event in the area of Supply Chain Management.

### The programme can be viewed here:

<https://conference.sapics.org/2024-programme/>

The conference also provides opportunities to re-connect with industry leaders, experts and fellow logistics professionals.

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## When you have a spare moment

- not often in our industry - you may want to read some of these articles online

### e-Commerce rocketing

South Africa's e-Commerce sales reached R71 billion in 2023

<https://techcentral.co.za/e-commerce-total-retail-sales-in-south-africa/244263/>

### The state of the ICT sector

ICASA The Independent Communications Authority of South Africa has issued its review of the market

[The-State-of-the-ICT-Sector-Report-31-March-2024](#)

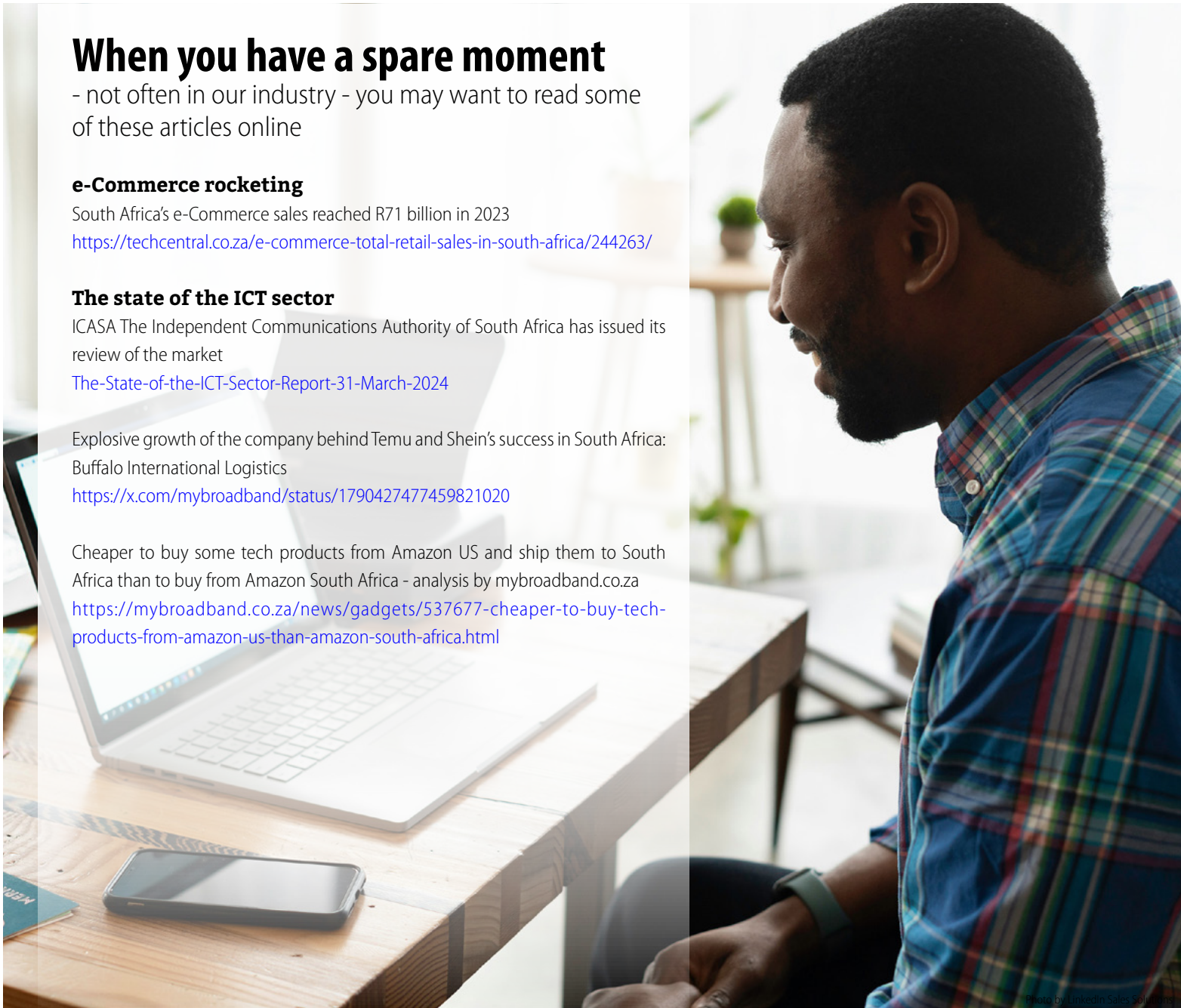
Explosive growth of the company behind Temu and Shein's success in South Africa:

Buffalo International Logistics

<https://x.com/mybroadband/status/1790427477459821020>

Cheaper to buy some tech products from Amazon US and ship them to South Africa than to buy from Amazon South Africa - analysis by mybroadband.co.za

<https://mybroadband.co.za/news/gadgets/537677-cheaper-to-buy-tech-products-from-amazon-us-than-amazon-south-africa.html>



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