



**CHRIS  
SLEIGHT**

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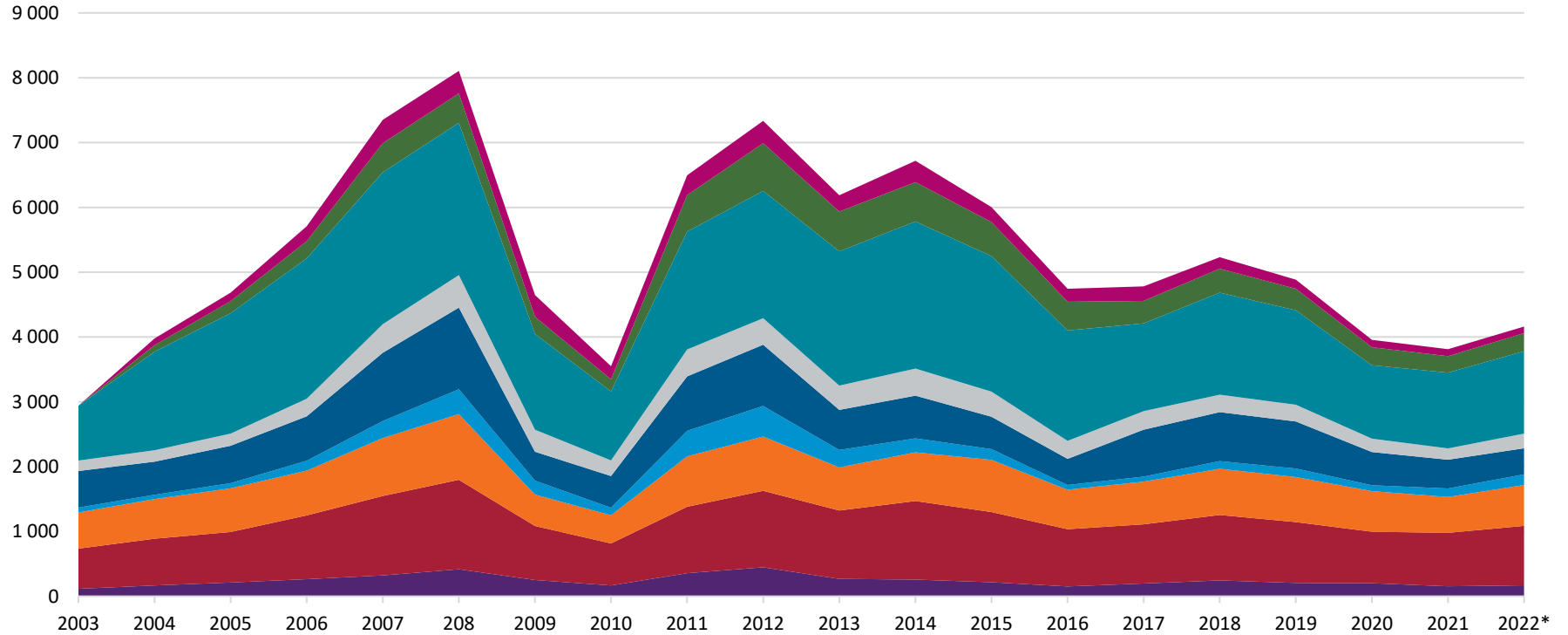
**Markets in  
Southern Africa**

**#CECEcongress**

# SOUTHERN AFRICA

- Data provided by Construction and Mining Equipment Suppliers' Association (CONMESA) secretariat company, Agfacts ([www.agfacts.co.za](http://www.agfacts.co.za))
- Coverage = South Africa, Botswana, Lesotho, Namibia and Swaziland (~25% of African market)

# SOUTHERN AFRICA

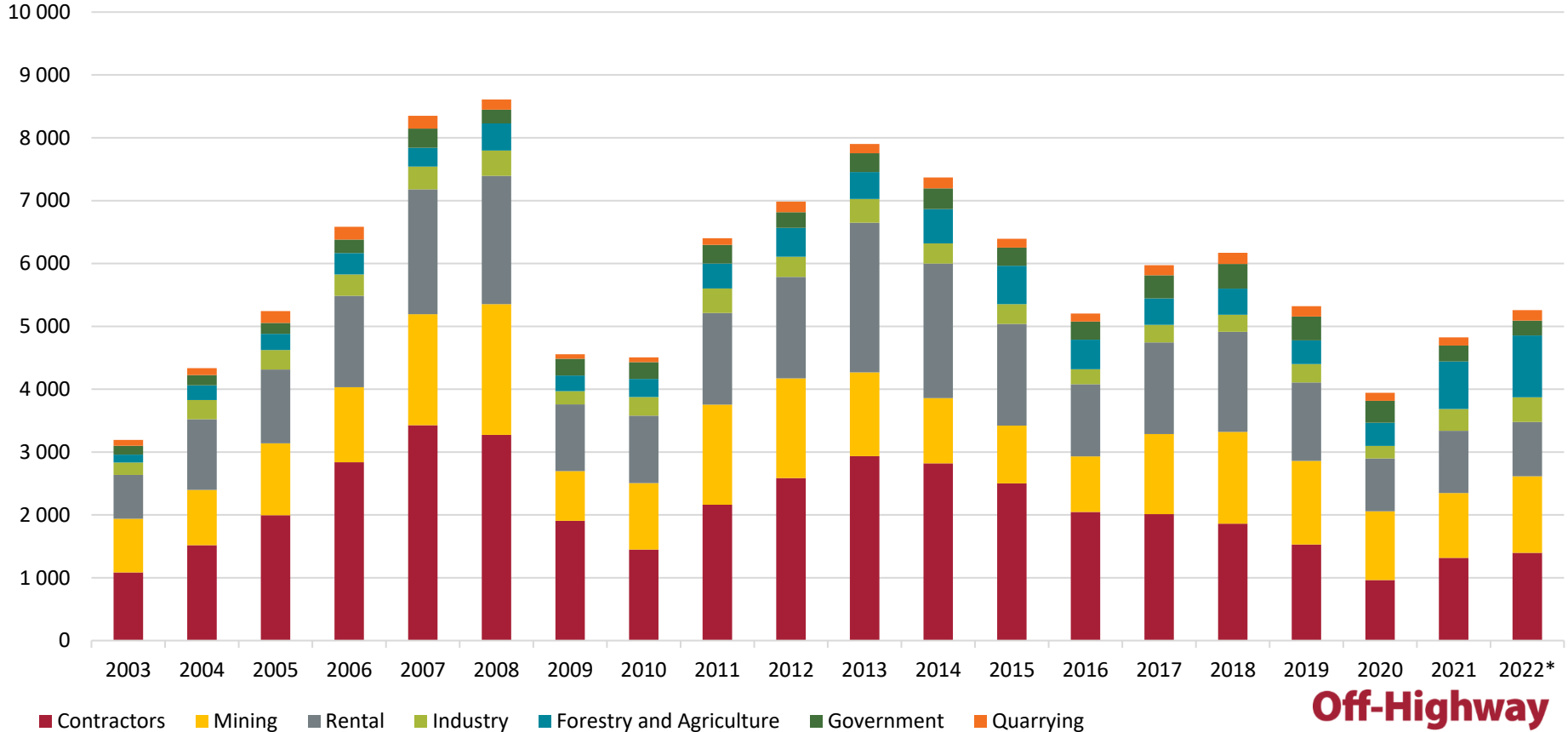


■ Crawler dozers ■ Crawler excavators ■ Wheeled loaders ■ RDTs ■ ADTs ■ Motor graders ■ Backhoe loaders ■ Skid-steer loaders ■ Single drum rollers

# SOUTHERN AFRICA

- Market subdued in the late 2010s
- Very weak post-Covid rebound
- Highest volume product is backhoe loaders
  - Few sales of any smaller equipment (genuine compact equipment)
- Large dump truck market thanks to mining

# SOUTHERN AFRICA



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- Contracts & rental companies historically the biggest customers, but have been weak since the pandemic
- Mining market provides some stability
- Post-Covid up-tick has been driven by forestry/agriculture
- Industry has to adjust to fundamentally lower volumes than seen in the early 2010s.

# WHAT DOES THE INDUSTRY SAY?

## Opportunities

- Outlook generally positive
- Traditional customers owning less equipment themselves – rental opportunities
- Strong mining sector, especially coal, gold & diamonds
- Positive developments in some of the smaller regional economies

# WHAT DOES THE INDUSTRY SAY?

## Challenges

- Inflation, shortages of materials & high transportation costs
- Major projects awarded to international contractors – tendency to source equipment centrally/out of region
- South Africa continues to under-invest in infrastructure and projects are slow to come to market
- 'Irregular' procurement practices and criminal influences  
(*Construction World* January 2023/Master Builders Association)



# THANK YOU – QUESTIONS?

More information at:

[www.offhighwayresearch.com](http://www.offhighwayresearch.com)

[www.agfacts.co.za](http://www.agfacts.co.za)

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