SEIZING THE MOMENT:
UNLOCKING SOUTH AFRICA'S
ECOMMERCE PROMISE

EFSA Ecommerce Report 2025
EXECUTIVE SUMMARY

Ecommerce Forum South Africa

TO: South Africa's Digital Future

FROM: Ecommerce Forum South Africa (EFSA), prepared by Mapungubwe Institute for Strategic Reflection (MISTRA)

Priority Handling

ECOMMERCE

ECOMM3RC3 PROM1S3

DESTINATION: A thriving ecommerce economy
STATUS: In transit to growth
WEIGHT: 1 Vision

DELIVERY: 2025
Handle with insight

PREPARED BY

MAPUNGUBWE
INSTITUTE FOR STRATEGIC REFLECTION (MISTRA)

IN COLLABORATION WITH

takealot.group

Delivering SA's ecommerce future is in our hands. Here's how we can do this.

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FOREWORD

Why South Africa's ecommerce "moment" really matters

"Seizing the Moment: Unlocking South Africa's E-Commerce Promise" highlights a critical inflection point for the country's online commerce sector. This moment demands reflection and collaboration among all stakeholders to foster enterprise growth by easing business regulations and ensuring consumer protection—a careful balance crucial for South Africa's ecommerce future.

Key elements mark this turning point. The ecommerce sector has rapidly grown into a major employer and economic driver, fuelled by advances in technologies. South Africa's ecommerce share of retail jumped dramatically from less than 1% in 2019 to almost 10% now, moving South Africa from "emerging" to "expanding" in ecommerce development. This impressive growth, which focused largely on Business-to-Consumer (B2C) markets, signals the need to emphasise Business-to-Business (B2B) digital commerce as a key growth area for both domestic and export markets.

Dr Alastair Tempest
Chief Executive Officer, EFSA

Another transformative force is social commerce—selling via social media platforms like TikTok, Facebook, and YouTube. This has empowered micro, small, and medium enterprises (MSMEs) to reach niche markets in sectors ranging from farm-to-table foods to fashion, sometimes attracting international buyers. Established emerchants leverage social commerce alongside their own websites and sell on platforms like Zulzi, Bash, Takealot and Amazon, supporting a diverse and dynamic selling environment.

This entrepreneurial spirit is central to South Africa's ecommerce success and relies on a complex ecosystem of logistics, fintech, warehousing, customer relations, and digital marketing. Government initiatives such as the Digital Economy Masterplan and the forthcoming Ecommerce Strategy, alongside negotiations with African Continental Free Trade Area (AfCFTA), are positive steps toward shaping a robust ecommerce landscape.

RMB research indicates South Africa could tap into a R1.3 trillion export market. Much will rely on selling via ecommerce, underscoring the need for focused upskilling and training programmes. Early digital literacy education is vital, ensuring children from all backgrounds understand the digital ecosystem. This is an essential skill set for all South Africans in future. It is also an important safeguard against cybercrime.

South Africa faces new opportunities through the AfCFTA, especially as global trade disruptions underscore the importance of regional trade. The AfCFTA's country-of-origin rules aim to concentrate production within Africa, benefiting the continent's economies and reinforcing local manufacturing and service industries.

This report recognises the challenges, including bridging the digital divide and the need to guard against cybercrime. The report also warns against the influx of 'ultra-fast fashion', which threatens national manufacturing and ecommerce. South African consumers' high uptake of cross-border fast fashion must have a balanced regulatory response. There must be a level playing field which will not stifle national industry growth.

While ecommerce alone won't solve deep socio-economic inequalities, it plays a pivotal role in driving inclusive and fair trade. "Seizing the Moment: Unlocking South Africa's Ecommerce Promise" calls for urgent and purposeful action from all stakeholders to realise the potential of ecommerce for South Africa's economy and society.

EFSA commends the Mapungubwe Institute for Strategic Reflection (MISTRA) for this insightful report, and thanks the Takealot Group for sponsoring the report. As South Africa's apex ecommerce body, EFSA urges all participants to engage proactively and seize this moment to unlock ecommerce's promise for the nation's future.

FOREWORD

Building South Africa's digital economy, together

Ecommerce is growing rapidly and is increasingly becoming a vital part of South Africa's economy and its recovery – connecting consumers and small businesses, creating jobs and driving innovation, supporting re-industrialisation efforts and economic growth. As the sector continues to evolve, it is essential that policy and regulation evolve alongside it, guided by credible research and inclusive dialogue.

Takealot Group appreciates the opportunity to have supported this study, undertaken independently by the Mapungubwe Institute for Strategic Reflections (MISTRA) and published by Ecommerce Forum South Africa (EFSA).

This collaboration reflects our shared commitment to deepening understanding of South Africa's digital economy and contributing to evidence-based policy making that enables sustainable growth and innovation.

Frederik Zietsman
Chief Executive Officer, Takealot Group

We are encouraged as an industry by MISTRA's rigorous research and EFSA for its leadership in fostering dialogue between business, policy makers, and civil society.

As a homegrown South African company, Takealot Group remains committed to engaging constructively in efforts that strengthen our digital ecosystem and expand opportunity for as many South Africans as possible.

EXECUTIVE SUMMARY

South Africa has the potential to build the continent's most inclusive and competitive ecommerce ecosystem that can drive much-needed economic growth and support the livelihoods of millions.

But potential must be realised and the time for that is now.

This is about 'Seizing the Moment'.

The agenda that will drive South Africa's ecommerce competitiveness requires urgent attention with immediate actions. By way of analogy, South Africa's ecommerce status is best expressed as a "share of CART".

The South African ecommerce CART is a compelling acronym that can be seen as the Key Performance Indicator (KPI) for stakeholders and policy makers. It is not a long-term ideal. This is what South Africa's ecommerce must immediately initiate to see tangible results in the short to medium term. South Africa's ecommerce CART must:

Connect – a connected and inclusive ecommerce ecosystem
Accelerate – ecommerce for accelerated economic growth and job creation
Regulate – a competitive, regulated, and trusted digital marketplace
Trade – cross-border digital trade integration

C Connect

A Accelerate

R Regulate

T Trade

This report provides a three-pronged strategic overview (Parts 1, 2, and 3), with a plan of action, to drive South Africa's ecommerce competitiveness:

1. **Firstly,** a review of South Africa's ecommerce status in an international context.
2. **Secondly,** a situational analysis identifies the specific enablers and hindrances impacting South Africa's ecommerce ecosystem.
3. **Thirdly,** strategic objectives give clear direction for executing a robust, sector-leading digital economy.

PART 1

SOUTH AFRICAN ECOMMERCE FROM A GLOBAL PERSPECTIVE

Ecommerce is emerging as a key enabler of inclusive growth, industrial competitiveness, and regional integration. The past two decades have seen exponential growth, with total international sales volumes now reaching US$6,419 trillion (R120 trillion), or 20.5% of total international retail sales. South Africa has also experienced rapid ecommerce growth, especially post–COVID-19. However, by global comparison in 2025, South Africa's retail sales are expected to reach US$6,95 billion (R130 billion), approaching 10% of total retail sales nationally.

INTERNATIONAL ECOMMERCE
20.5%

PERCENT OF TOTAL

RETAIL SALES 2025

10%

SOUTH AFRICAN ECOMMERCE

US$6,419 trillion **(R120trn)**,
20.5% of total retail sales

US$6,95 billion **(R130bn)**,
10% of total retail sales

Why is this? And what are the interventions that need urgent attention to make South Africa's ecommerce more accessible and competitive?

> **The research for this report is guided by the underlying question: What regulatory and policy mechanisms can South Africa implement to advance inclusive economic growth, local industrial development, and digital sovereignty, while ensuring fair competition between domestic and offshore ecommerce firms?**

There is a significant and mostly positive impact of large multinational ecommerce companies, commonly known as Very Large Online Platforms (VLOPs), on domestic economies. However, there can also be "level playing field" concerns, from labour practice to product and customs duty concerns, amongst others. It is also evident that VLOPs tend to react swiftly to public concerns. Regulatory bodies still need to monitor and legislate as rapidly as ecommerce expands.

As ecommerce expands, as declining data costs broaden digital adoption, and as last-mile delivery and fulfilment continue to innovate, South Africa must embrace global ecommerce competition while supporting and growing the local ecommerce ecosystem. Regulation and policy must safeguard national interests. All said, it is a delicate balance.

Compared with ideal international development, South Africa is at imminent risk of an ecommerce ecosystem asymmetry, one of exclusion rather than opportunity. This is underscored by key data from the research. It shows a high prevalence of outward ecommerce flows rather than inflows, undermining domestic economic value and worsening the dual characteristic of the

ecommerce landscape. Hence, the timely sharing of this report and the need for urgent attention to its findings and recommendations in terms of a national ecommerce strategy:

- A national, data-informed roadmap inducing trust and inclusivity aligned to South Africa's broader developmental aspirations

- Analysis of prevailing regulatory gaps

- Modelling South Africa's ecommerce maturity with the strategic commitments embedded in the National Development Plan (NDP)

- The Digital Economy Master Plan (DEMP)

- The integrated Information and Communication Technology (ICT) Policy White Paper

- The African Union Digital Transformation Strategy for Africa (2020-2030)

- The African Union Agenda 2063

- The African Continental Free Trade Area (AfCFTA) Digital Trade Protocol

South Africa's "Big Five" challenges

To build South Africa's inclusive and globally competitive ecommerce ecosystem, these are the "Big Five" challenges the country must address. Essentially, these are the challenges that must be engaged and overcome to reposition South Africa's share of CART:
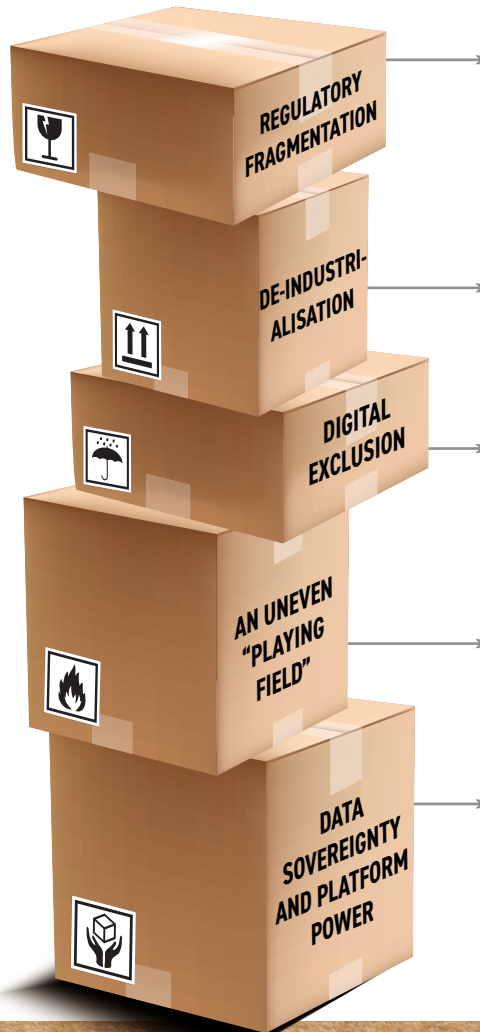
1 **Regulatory fragmentation:** Oversight is siloed within a range of regulatory bodies with relevant but diverse focus areas. This fragmentation is exacerbated by inadequate co-ordination amongst key regulatory institutions, which can result in foreign players operating outside of the ambit of South Africa's own ecommerce ecosystem.

2 **De-industrialisation:** Without local content rules or domestic platform incentives, international ecommerce risks displacing, rather than building, domestic value chains.

3 **Digital exclusion:** Unlike the international ecommerce environment, township economies, which host over 1,1 million MSMEs, still rely on cash-based transactions. Over 60% of these businesses operate informally and lack digital onboarding support. (Finmark Trust, 2022).

4 **An uneven "playing field":** Dominant global platforms like Shein enjoy tax concessions, operational scale, and low compliance costs, which disadvantage local platforms and MSMEs.

5 **Data sovereignty and platform power:** Regulation and monitoring of cross-border data flows is limited. Algorithmic transparency risks economic control being handed to foreign platforms.

South Africa's strategic objectives

Overlaid with this is an internationally accepted framework for assessing a country's ecommerce readiness. United Nations Conference on Trade and Development (UNCTAD) provides an eTrade Readiness Assessment framework to evaluate a country's ecommerce ecosystem (UNCTAD, 2023). There are seven pillars, however the six pillars used to assess ecommerce readiness are:

The six pillars are:

- Legal and regulatory frameworks
- ICT infrastructure and services
- Payment solutions
- Trade logistics and facilitation
- Skills development
- Access to financing
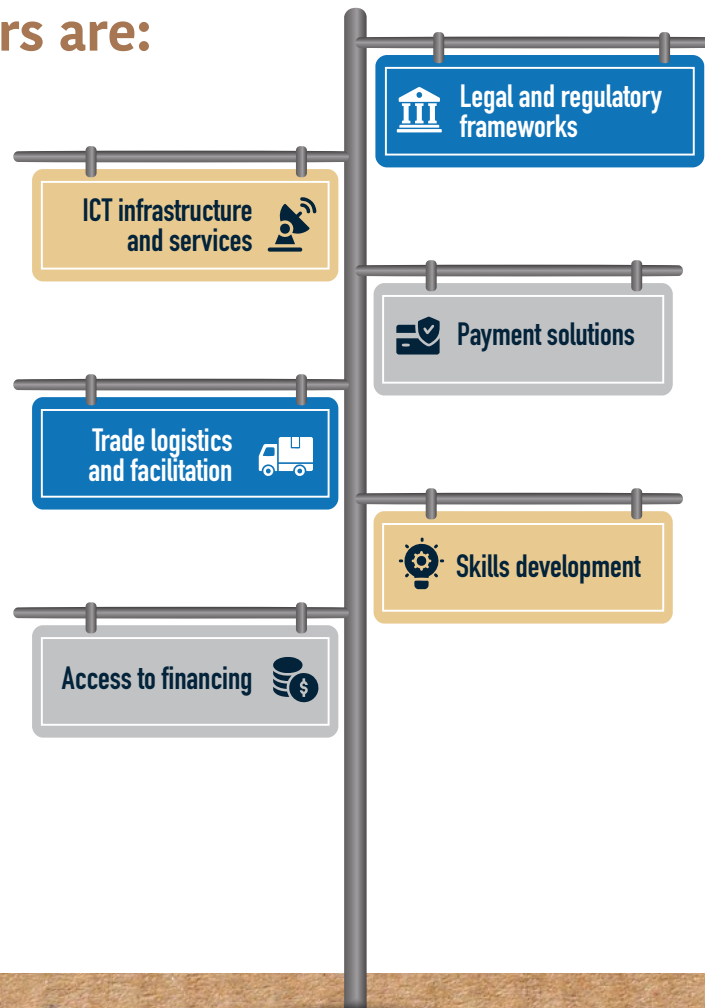
From these combined pillars comes an empirical model that reflects the developmental stages of ecommerce. Countries have a comparative maturity index (see also Fig. 7 and Fig. 6 on page 16):

Below 0.00 → Nascent: early-stage adoption, minimal consumer engagement, limited digital infrastructure, small number of emerging platforms.

0.00 to 0.50 → Emerging: improved internet access stimulates online trade. Logistical inefficiencies, trust deficits, and the prevalence of counterfeit goods can still persist.

0.51 to 1.00 → Expanding: rapid growth in supply and demand, mobile internet access using smartphone technology. Policy making for systemic support and regulation to ensure fair competition with inclusive growth.

Above 1.00 → Maturity: slower growth, vastly increased transaction volumes, global integration.

> **Factoring a dual economy, South Africa's ecommerce maturity is both emerging and expanding. Compared with similar (CART-for-CART) dual economies such as India, China, Kenya and Nigeria, South Africa is well above the average. Yet there is ample and immediate opportunity to fast-track South Africa's maturity index to make it more inclusive. Again, this involves both regulatory and non-regulatory enablers.**

Regulatory factors include consumer protection, data privacy, payment and finance, logistics and supply chains, and monitoring for fair competition. Non-regulatory considerations include public-private investment in platforms and logistics, digital skills training, enterprise development programmes, a reduction in technology adoption costs, and cybersecurity awareness to build greater consumer confidence and trust.

> **As a regional leader that ranks 73rd of 152 indexed countries, South Africa is well-positioned to champion digital trade negotiations and promote harmonised ecommerce protocols across the African continent. The shared opportunity to further integrate dual economies is present and immediate.**

Here is a snapshot comparison of South Africa's ecommerce maturity:
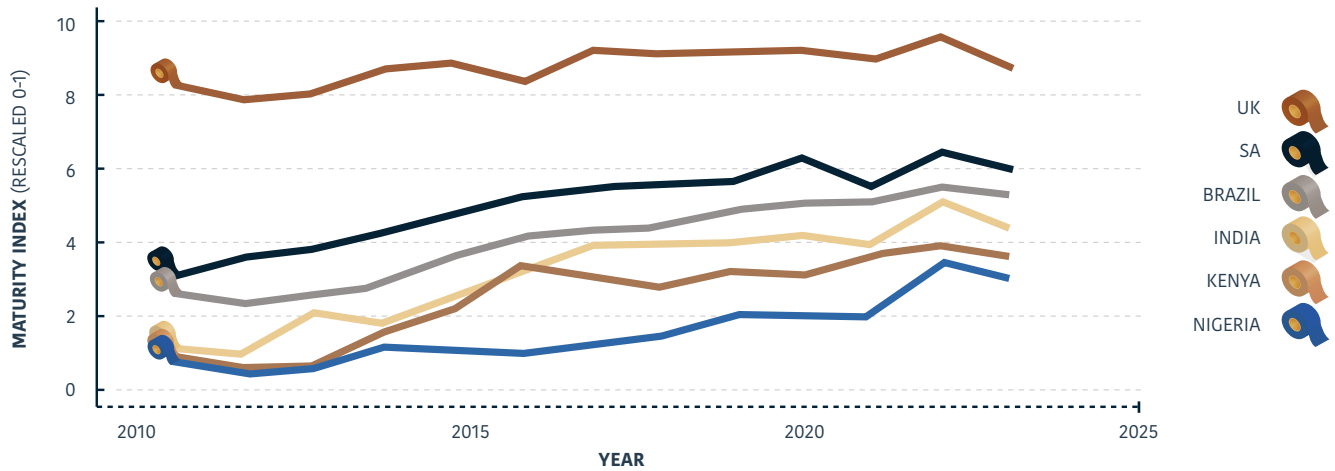

Fig 7. South Africa's composite ecommerce ecosystem maturity index: cross-country comparison (2010-2025)

Definitions of ecommerce do vary, to the inclusion or exclusion of influencing factors. This can affect comparisons of ecommerce maturity. A review of South Africa's ecommerce, for instance, will factor its dual economy and strategic priorities for inclusive ecommerce.

Definitions of ecommerce and their implications for regulation

- Laudon and Traver (2021) define ecommerce simply as digitally enabled transactions between and among organisations and individuals.
- UNCTAD and The Organisation for Economic Co-operation and Development (OECD) jointly view ecommerce as computer-mediated networks specifically designed for the exchange of goods and services (Fredriksson, 2017; UNCTAD, 2017).
- The World Trade Organization (WTO) incorporates the production, distribution, marketing, and sale of goods and services through technology that is specifically designed to place and receive orders (Ismail, 2020).

This excludes transactions via telephone and email, but implies channels of distribution (i.e. employees) and marketing must be included in ecommerce regulation. The South African VAT Act further recognises various product segments, such as digital content and financial services (excluding telecommunication services) (SARS, 2019).

South Africa can foster a competitivbe, inclusive, and sovereign digital economy.
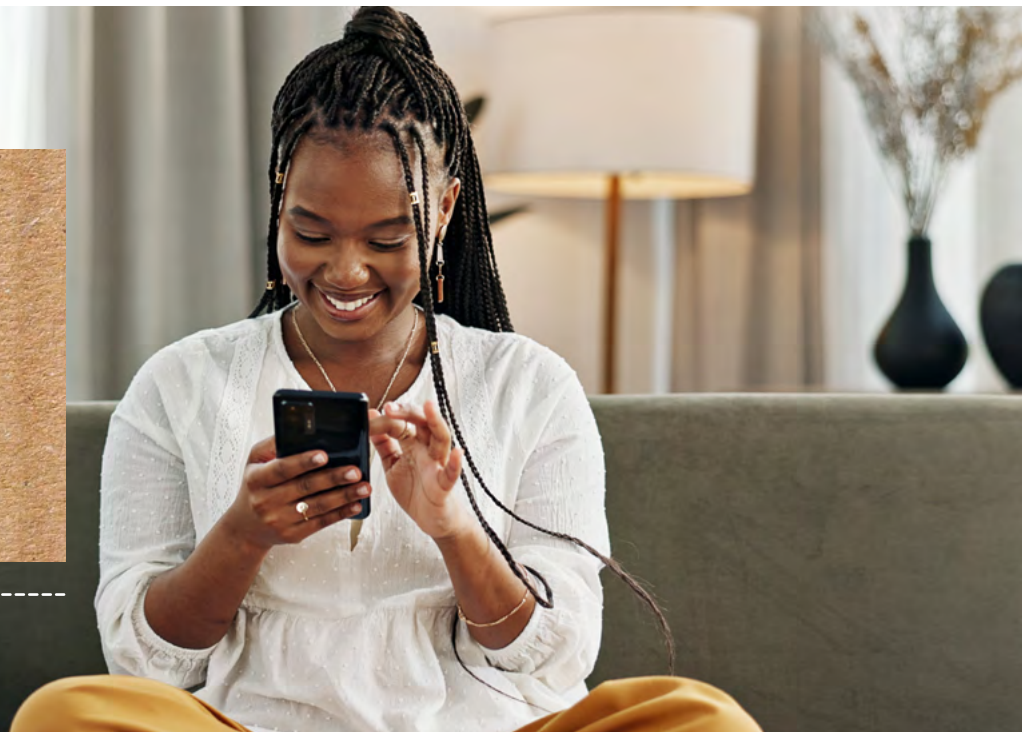
Regulatory and non-regulatory approaches

Ecommerce regulation can easily become convoluted. This report presents the necessary groundwork, interrogation, and applicable modelling for South African stakeholders to reach a strategically informed, regulatory consensus.

With insights from the countries compared above, we can identify immediate regulatory and non-regulatory interventions needing urgent response.

Regulatory ecommerce interventions:
- Consumer protection laws
- Data privacy regulations
- Payment and financial regulations
- Taxation and trade policies
- Logistics and supply chain standards
- Competition regulation

Non-regulatory ecommerce interventions:
- Digital skills training for entrepreneurs and MSMEs
- Enterprise development programmes to build business capacity
- Public-private partnerships to invest in platforms and logistics
- Development finance to reduce technology adoption costs
- Cybersecurity awareness campaigns to build consumer trust and transparent review systems to enhance credibility and participation

As a regional leader, South Africa can champion digital trade negotiations and harmonise ecommerce protocols across Africa. This includes tariff neutrality, cross-border data standards and payment protocols, as well as both physical and digital infrastructure for intra-African trade and innovation.

South Africa should invest in homegrown digital platforms and services, but not to the exclusion of embracing foreign investment and competition. South Africa's CART needs to check both within and without. This means blended finance models for MSMEs and township entrepreneurs, localised digital services, and dedicated digital zones like China's Digital Free Trade Zones and Taobao Villages (Wang, 2024; Chen, Zang & Miao, 2023).

With regulatory agility and targeted developmental interventions, South Africa can foster a competitive, inclusive, and sovereign digital economy. This approach not only addresses spatial and structural inequalities but also positions the country as being proactive in the future of global ecommerce governance.

It is with this international context that South Africa focuses on its own challenges, requirements, and obligations.

PART 2

THE SOUTH AFRICAN ECOMMERCE LANDSCAPE

UNCTAD provides an eTrade Readiness Assessment framework to evaluate a country's ecommerce ecosystem. Six original pillars - legal and regulatory frameworks, ICT infrastructure and services, payment solutions, trade logistics and facilitation, skills development, and access to financing - provide the model for a maturity assessment. A seventh pillar is added to define and accommodate a country's unique requirements. It allows for a strategically fit-for-purpose approach.

Here is South Africa's ecommerce maturity progression across the past fifteen years:
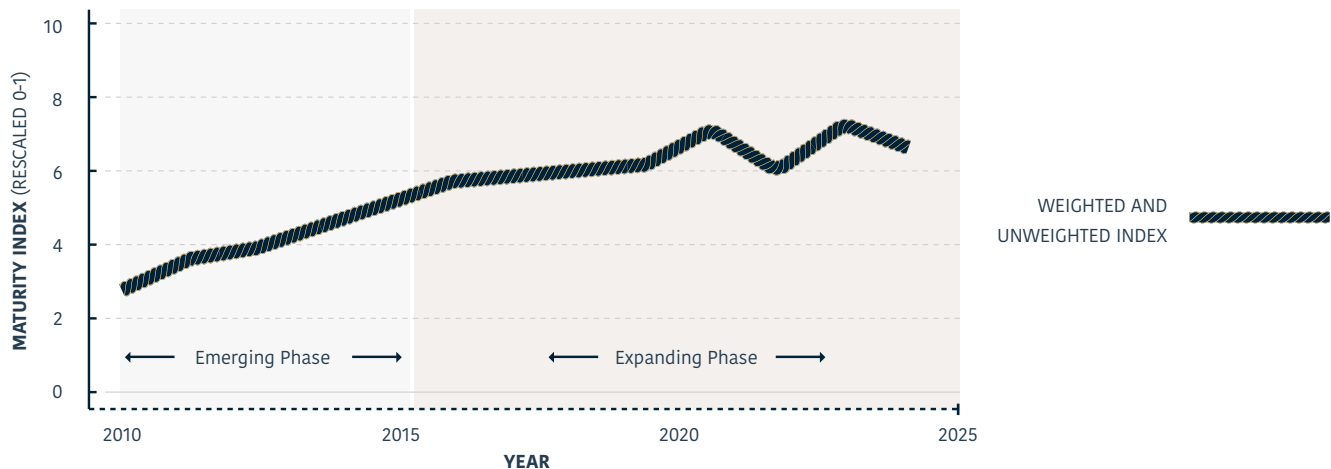

Fig 6. South Africa's composite ecommerce ecosystem maturity index (2010–2025)

South Africa's ecommerce market has shown consistent double-digit growth. Latest figures reflect online retail expansion estimated at R96 billion (US$5,6 billion) in 2024. This is roughly 8% of total retail sales. Projections for 2025 reach R130 billion. (Worldwide Worx, 2025)

Ecommerce sales grew sharply during COVID-19. After a post-COVID-19 dip, sales continue to grow, driven by these key factors:
- Digital infrastructure
- Smartphone penetration
- Fintech (digital) innovation
- Paved road network and physical address locations
- Logistics expansion
- Regulatory momentum

> **The South African landscape is in an early stage of maturity, with rapid digital advancement and global platform disruption reshaping competitive dynamics (Mordor Intelligence, 2025).**
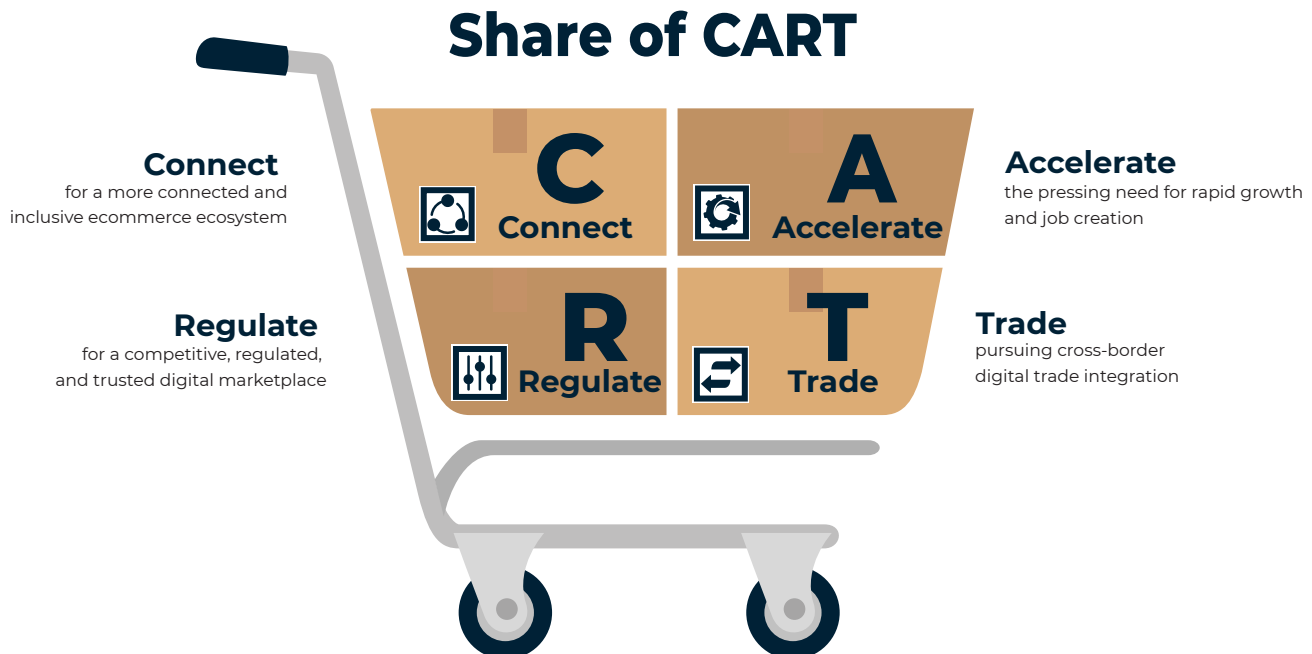
With South Africa's dual economy, key stakeholders must engage in viable, inclusive solutions, both regulatory and non-regulatory. These include:
- Government departments and regulatory agencies
- Domestic ecommerce platforms and logistics
- MSMEs, informal traders, and entrepreneurs
- Consumers and Civil Society
- Development Partners and Regional Institutions

PART 3

STRATEGIC ACTIONS AND OUTCOMES FOR ECOMMERCE DEVELOPMENT IN SOUTH AFRICA

This is where the ecommerce CART analogy brings sharp, cohesive focus to four urgent action statements:

Share of CART

Connect
for a more connected and inclusive ecommerce ecosystem

C Connect

A Accelerate

Accelerate
the pressing need for rapid growth and job creation

Regulate
for a competitive, regulated, and trusted digital marketplace

R Regulate

T Trade

Trade
pursuing cross-border digital trade integration

South Africa's four required ecommerce ecosystem actions

Action 1: A **connected** and inclusive ecommerce ecosystem

Ecommerce in South Africa should be underpinned by universal digital access, reliable broadband infrastructure, and inclusive digital participation that empowers all citizens, urban and rural, to engage meaningfully in online commerce.

- National Development Plan (NDP) reference: Expand ICT access and reduce infrastructure disparities to unlock innovation and opportunity. Ensure energy security by building a robust energy sector that is not disrupted by power shortages and can support industrial and technological advancement
- South African (SA) digital roadmap goal: Achieve 90% broadband coverage and full digital citizenship by 2030
- African Union (AU) digital strategy goal: Connect every African to the internet affordably

Action 2: Ecommerce for **accelerated** economic growth and job creation

Ecommerce will be a driver of economic diversification, MSME growth, and employment generation. This is particularly pertinent to underserved regions and informal economies, with a focus on youth- and women-led enterprises.

- NDP reference: Support small enterprises and informal businesses as engines of inclusive economic growth
- SA digital roadmap goal: Develop high-growth sectors through digital platforms and innovation support
- AU digital strategy goal: Use digital technologies to create 300 million new jobs by 2030, particularly for women and youth

Action 3: A competitive, **regulated**, and trusted digital marketplace

South Africa will develop and regulate an open, secure, and competitive ecommerce environment that protects consumer rights, promotes digital trust, and ensures fair platform practices.

- NDP reference: Ensure institutions that strengthen and uphold competition, consumer protection and economic inclusion
- SA digital roadmap goal: Establish trust in digital platforms through robust cybersecurity and data protection, and through a trustmark
- AU digital strategy goal: Harmonise the continental digital market with secure and interoperable platforms

Action 4: Cross-border digital **trade** integration

South Africa will leverage its strategic position within the Southern African Development Community (SADC) and the African Continental Free Trade Area (AfCFTA) to become a driving participant in a regional ecommerce hub and promote the digital economy across the continent.

- NDP reference: Deepen regional integration to improve market access and trade competitiveness
- SA digital roadmap goal: Harmonise ecommerce policy with regional frameworks and expand trade in digital services
- AU digital strategy goal: Build a digital single market in Africa with full digital trade interoperability by 2030

Desired outcome statements for the four actions

Trust: Secure, transparent, and accountable digital ecosystem

Engineer and build a digital commerce environment, fostering consumer and seller trust through cyber protection, data governance, dispute resolution, and platform transparency.

- Launch of a national etrustmark for compliant platforms
- Strengthened enforcement of POPIA, CPA, and the Cybercrimes Act
- Real-time consumer complaint resolution mechanism
- Public dashboards for platform performance, Dark Patterns and consumer ratings

Access and growth: Expanded digital and market infrastructure

Drive universal digital access, affordable connectivity, and efficient logistics. Ecommerce must enable the broadest possible participation with sustained market growth.

- 90% broadband coverage by 2030
- Establishment of rural ecommerce hubs and smart logistics corridors
- Reduced data and delivery costs, particularly in underserved areas
- Platform and payment innovation supported by Digital Public Infrastructure (DPI)

Inclusion: Equitable participation of products, sellers, and spaces

Create a vibrant, stimulating ecommerce sector that empowers MSMEs, attracts women and youth-led enterprises, draws in township and rural businesses, opens up digital markets, scales operations, and grows national GDP.

- 60% MSME participation in ecommerce
- Digital onboarding toolkits for township and rural sellers
- Targeted support for local crafts, agro-processing, and informal businesses
- Training programmes in local languages and in community-based centres

Trade: Regional integration and digital export capacity

South Africa becomes a regional ecommerce hub, with efficient cross-border trade and increased participation in AfCFTA and SADC digital markets.

- 50% growth in cross-border ecommerce trade volumes by 2030
- Harmonised customs and payments frameworks with SADC/AU partners
- Platform localisation and multilingual interfaces for African markets
- Support for digital exporters and MSME trade corridors

Industrialisation: Ecommerce as a driver of local value addition

Ecommerce facilitates backward linkages to manufacturing, agro-processing, services sectors, and creative industries, streamlining reindustrialisation and local value addition.

- Support for domestic platform development and MSME logistics providers
- Digital marketplaces linked to local production hubs
- Incentives for ecommerce platforms sourcing local content
- Green infrastructure investment aligned with industrial policy

Level playing field: Fair competition and balanced regulatory environment

A regulatory regime should ensure equitable market participation through consistent taxation, rational Foreign Direct Investment (FDI) rules, and enforcement of fair competition across local and foreign platforms.

- Enforcement of taxation and relevant customs duties on foreign platforms
- FDI reforms for marketplace vs inventory-based ecommerce models
- Local licensing and registration requirements of international platforms based on volumes
- Implementation of the Competition Commission market inquiry recommendations to all players
- Clear digital trade rules aligned with AfCFTA digital trade protocol

CONCLUSION

KEY FINDINGS AND RECOMMENDATIONS

South Africa's ecommerce CART actions are motivated by specific finding: There is a need to **connect** to digitally excluded communities by making online access more affordable. Structural constraints are preventing the **acceleration** of ecommerce expansion. Siloed or fractured **regulation** compromises governance and enforcement. Disruption of local market dynamics by foreign platforms can hamper fair **trade**.

Here are the specific recommendations for each finding:

Recommendations for Finding 1: South Africa's ecommerce ecosystem is in the expanding phase but faces structural constraints
- Launch a "National Ecommerce Maturity Dashboard" to monitor progress across infrastructure, payments, inclusion, and trade
- Expand township and rural fulfilment centres to decentralise logistics and reduce last-mile delivery costs
- Introduce targeted MSME onboarding incentives, including homepage advertising subsidies and digital onboarding toolkits

Recommendations for Finding 2: Foreign platforms are disrupting local market dynamics
- Mandate local registration and tax compliance for foreign platforms exceeding a transaction threshold
- Differentiate FDI rules between marketplace and inventory-based models to protect local vendors
- Introduce platform neutrality and algorithm transparency laws, modelled on the EU's Digital Markets Act (DMA) and UK's Strategic Market Status (SMS) regime

Recommendations for Finding 3: Township and rural MSMEs remain digitally excluded
- Scale the township inclusion initiatives to include warehousing, logistics, and digital training
- Develop vernacular digital literacy programmes and community-based training centres
- Subsidise mobile payment systems and smart lockers to improve transaction reliability and delivery
- Pilot localised Free Digital Trade Zones (FDTZs) in township and rural areas to stimulate digital exports, MSME growth, and regional integration

Recommendations for Finding 4: Regulatory fragmentation weakens governance and enforcement

- Establish a dedicated ecommerce regulatory unit within the Department of Trade, Industry and Competition (DTIC) to co-ordinate oversight and enforcement
- Strengthen the Consumer Goods and Services Ombud's (CGSO) jurisdiction to include foreign platforms and enforce cross-border consumer protection
- Digitise customs and import tracking systems to monitor small parcel volumes and enforce compliance

Recommendations for Finding 5: South Africa has a strong digital infrastructure but lags in affordability and inclusion

- Accelerate SA Connect broadband rollout, prioritising underserved areas
- Introduce data cost reduction policies through spectrum reform and infrastructure competition
- Promote public-private partnerships to build smart logistics corridors and rural ecommerce hubs

> A top priority for South Africa's continued ecommerce maturity is to close the dual economy gap while still competing with VLOPs. All regulatory and non-regulatory measures need to be leveraged. The urgency of a more inclusive ecommerce system must be a focal point both locally and internationally. South Africa's ecommerce CART can be grown with common purpose and shared values.

A granular, substantiating analysis is detailed in the full report that follows. The state of South Africa's ecommerce CART is scrutinised and reassembled for a more **connected**, **accelerated**, fairly **regulated** ecommerce **trade** ahead.

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2025

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