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Deputy Director-General: Economic statistics

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1. Introduction

Statistics South Africa conducted pilot surveys of the forestry, logging and related services industry for the three reference years 2014, 2015 and 2017, with the aim of determining the industry's nature and structure.

This information is used in developing plans and policies regarding industry growth, prices, jobs and investment.

The reason for publishing the results as a discussion document is to provide stakeholders (both users and respondents) an opportunity to give inputs on how we can improve the publication. The following are some of the challenges when conducting the survey:

- The lack of an up-to-date administrative database of forestry entities, and
- Difficulty in collecting production information (e.g. land size and quantity of various types of timber).

1.1 Scope and coverage

This survey covers enterprises mainly engaged in the forestry, logging and related services industry in the following activities, classified at major group level according to the January 1993 edition of the *Standard Industrial Classification of all Economic Activities* (SIC), Fifth Edition, Report No. 09-90-02:

- Forestry and related services (SIC 121); and
- Logging and related services (SIC 122).

Stats SA publishes the results of pilot surveys in order to stimulate interaction with users of the statistics. Any comments on how the data can be improved should be sent to TshepoP@statssa.gov.za / ItaniM@statssa.gov.za

1.2 Data items

The following categories of data items were collected: industrial classification, details of employment, trading income, expenditure, profit or loss, inventories, details of assets and liabilities, carrying value of assets and capital expenditure on new assets.

1.3 Reference period

The questionnaires were completed for the financial year of the enterprise which **ended on any date between 1 July 2016 and 30 June 2017**, according to the usual reporting schedule of the enterprise.

Example

- 1 October 2015 – 30 September 2016
- 1 January 2016 – 31 December 2016
- 1 February 2016 – 31 January 2017
- 1 March 2016 – 29 February 2017
- 1 April 2016 – 31 March 2017

1.4 Current prices

The rand values are at current prices.

1.5 Reliability of data

All estimates compiled for this industry are subject to both sampling and non-sampling errors.

The following are some of the likely sources of non-sampling errors: sampling frame not up to date, wrong definitions and classification, phrasing of questions, non-response, processing and estimation. Every effort is made to minimise non-sampling errors by careful design of questionnaires, testing them with a sample of respondents, editing reported data and implementing efficient operating procedures. Non-sampling errors occur in both sample surveys and censuses.

As a discussion document, these results are not official statistics, but rather the results of a pilot survey aimed to investigate approaches to improve the understanding of the industry. Future surveys of the industry may therefore differ substantially when published as official statistics.

1.6 Confidentiality

According to section 17 of the Statistics Act, 1999 (Act No. 6 of 1999), completed questionnaires remain confidential to Statistics South Africa (Stats SA). Individual business information is never disclosed. Results are presented in aggregated form only.

1.7 Reporting unit

The statistical unit for the collection of information is an enterprise. An enterprise is a legal unit (or a combination of legal units) that includes and directly controls all functions necessary to carry out its activities. Each industry is classified to an industry that reflects its predominant activity.

2. Summary of findings

2.1 Income

Table A – Income in the forestry, logging and related services industry, 2014 – 2017

Type of service	2014		2015		2017	
	R million	% contribution	R million	% contribution	R million	% contribution
Forestry and related services	14 950	95,5	16 901	95,7	23 741	96,4
Logging and related services	710	4,5	763	4,3	879	3,6
Total	15 660	100,0	17 664	100,0	24 620	100,0

The total income for the forestry, logging and related services industry in 2017 was R24,6 billion. The total income represents an increase of 18,1% per annum over the income reported in the corresponding survey of 2015 (R17,7 billion). Comparing 2015 and 2017, a large increase was reported for 'forestry and related services' (+R6,8 billion).

Table B – Concentration ratio for total income in the forestry, logging and related services industry, 2014 – 2017

Concentration ratio	2014	2015	2017
	%		
CR5	71,1	69,6	66,0
CR10	79,2	78,8	75,3
CR20	83,6	83,5	80,9
CR50	89,8	89,6	87,5
CR100	94,6	94,5	92,7

In 2017, the top 100 enterprises in the forestry, logging and related services industry contributed 92,7% of the total income. The highest concentration ratio of the top 100 (CR100) in the three periods was at 94,6% in 2014. The concentration ratios of the top 5, 10, 20, 50 and 100 enterprises were the lowest in 2017 at 66,0%, 75,3%, 80,9%, 87,5% and 92,7% respectively.

Table C – Profit margin in the forestry, logging and related services industry, 2014 – 2017

Type of service	Turnover			Net profit after tax			Profit margins		
	2014	2015	2017	2014	2015	2017	2014	2015	2017
	R million						%		
Forestry and related services	13 417	14 875	19 448	1 506	1 776	3 148	11,2	11,9	16,2
Logging and related services	689	728	840	20	46	35	2,9	6,3	4,2
Total	14 106	15 603	20 288	1 526	1 822	3 183	10,8	11,7	15,7

The profit margin in the forestry, logging and related services industry increased to 15,7% in 2017 from 10,8% in 2014. This was driven by 'forestry and related services', which increased to 16,2% from 11,2% over the same period.

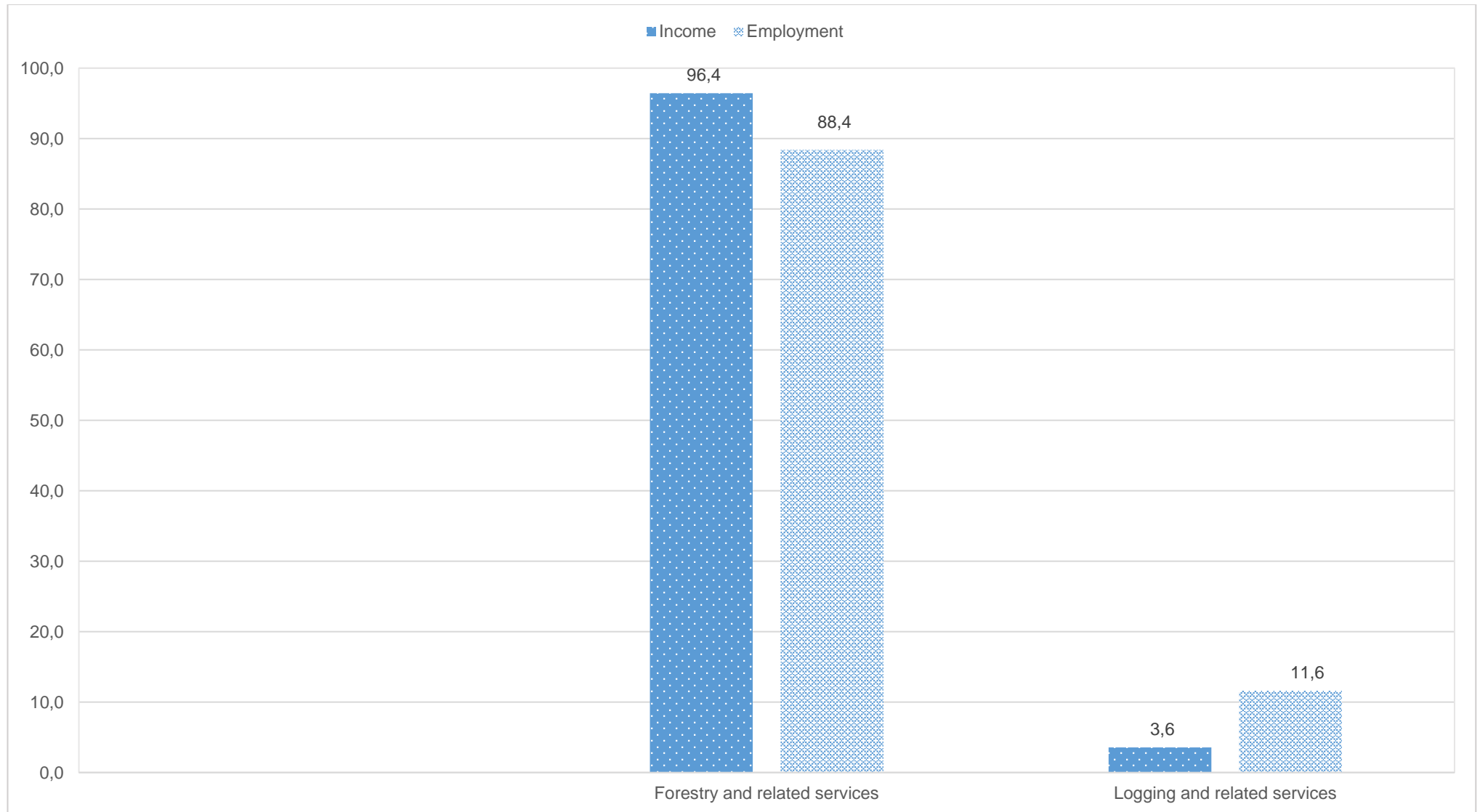
2.2 Employment

Table D – Employment as at the end of June in the forestry, logging and related services industry, 2014 – 2017

Type of service	2014		2015		2017	
	Number	% contribution	Number	% contribution	Number	% contribution
Forestry and related services	27 722	87,8	33 470	89,5	33 982	88,4
Logging and related services	3 862	12,2	3 926	10,5	4 466	11,6
Total	31 584	100,0	37 396	100,0	38 448	100,0

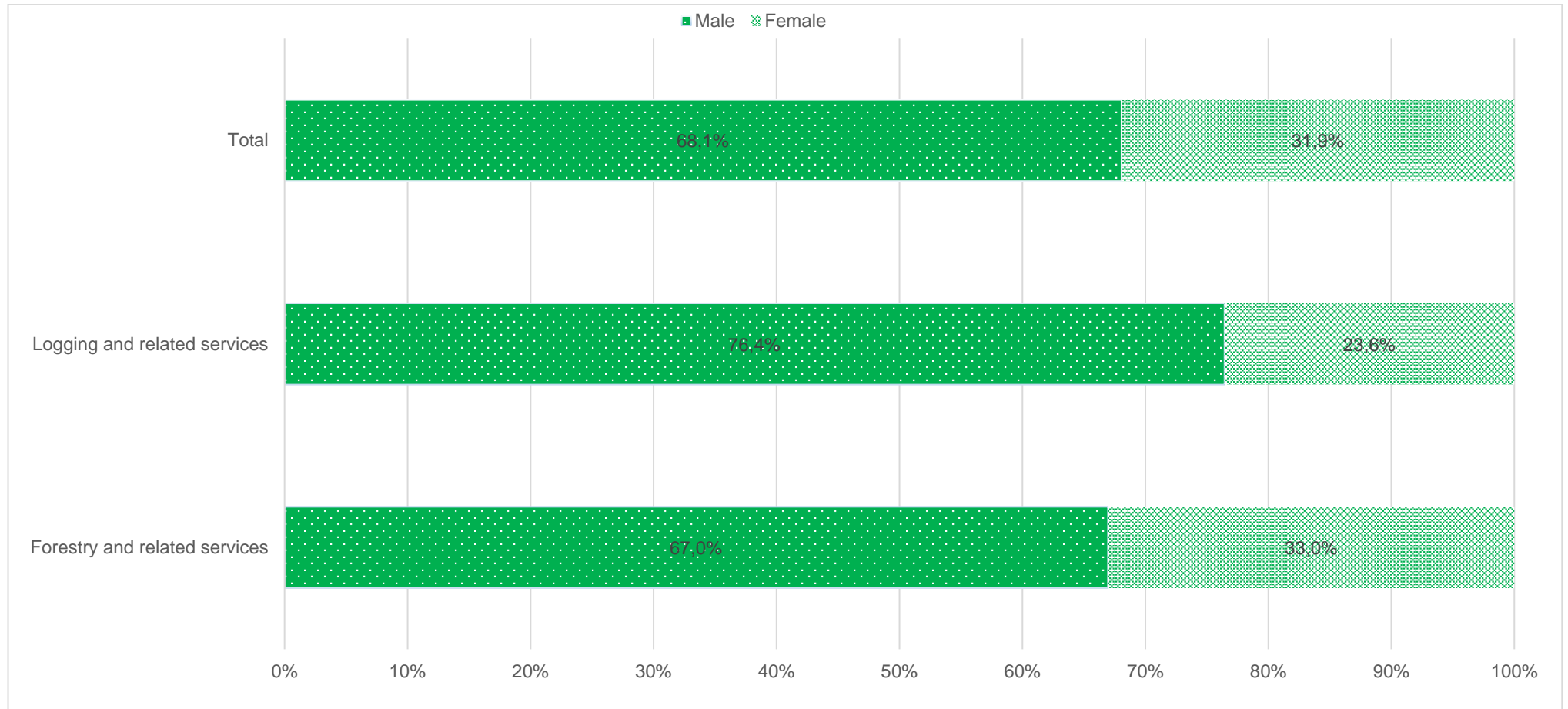
The total number of persons employed in the forestry, logging and related services industry as at the end of June 2017 was 38 448. 'Forestry and related services' employed the largest number of persons (33 982 or 88,4%).

Figure 1 – Income and employment by type of service (% contribution) in the forestry, logging and related services industry, 2017



The type of service with the highest proportion of employment compared with its proportion of income was 'logging and related services' (contributing 11,6% of employment and 3,6% of income). 'Forestry and related services' contributed 88,4% to the employment of the forestry, logging and related services industry in 2017 while its contribution to total income was 96,4%.

Figure 2 – Gender ratios in the forestry, logging and related services industry, 2017



The proportion of females out of the total persons employed was 31,9%. The sector with the highest proportion of females employed was 'forestry and related services' (33,0%), while 'logging and related services' had the highest proportion of males employed (76,4%).

Table E – Average salaries and wages in the forestry, logging and related services industry, 2014 – 2017

Type of service	2014			2015			2017		
	Salaries and wages	Total employees	Average salaries and wages	Salaries and wages	Total employees	Average salaries and wages	Salaries and wages	Total employees	Average salaries and wages
	R million	Number	Rands	R million	Number	Rands	R million	Number	Rands
Forestry and related services	2 634	27 722	95 015	2 986	33 470	89 214	3 707	33 982	109 087
Logging and related services	187	3 862	48 421	198	3 926	50 433	267	4 466	59 785
Total	2 821	31 584	89 317	3 184	37 396	85 143	3 974	38 448	103 360

The average value of salaries and wages in the forestry, logging and related services industry in 2017 was R103 360. The type of service with the highest average salaries and wages in 2017 was 'forestry and related services' (R109 087).

2.3 Capital expenditure on new assets**Table F – Capital expenditure on new assets in the forestry, logging and related services industry, 2014 – 2017**

Type of service	2014		2015		2017	
	R million	% contribution	R million	% contribution	R million	% contribution
Forestry and related services	1 068	89,8	1 133	92,2	2 021	96,4
Logging and related services	121	10,2	96	7,8	75	3,6
Total	1 189	100,0	1 229	100,0	2 096	100,0

The capital expenditure on new assets in 2017 (R2,1 billion) represents an increase of 30,6% per annum over the expenditure reported in the corresponding survey of 2015 (R1,2 billion). Comparing 2015 and 2017, the largest increase was reported for 'forestry and related services' (+R0,9 billion).

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Deputy Director-General: Economic statistics

3. Tables

Table 1 – Principal statistics in the forestry, logging and related services industry, 2015 and 2017

	Total income	Total current expenditure	Total value of opening inventory	Total value of closing inventory	Net profit before tax	Carrying value of assets at the beginning of the financial year	Carrying value of assets at the end of the financial year	Capital expenditure on assets	Number of employees
	R million								Number
2015¹	17 664	15 227	1 229	1 281	2 489	7 738	7 988	1 229	37 396
2017²	24 620	20 487	1 402	1 663	4 394	9 800	10 684	2 096	38 448
Annualised % change	18,1	16,0	6,8	13,9	32,9	12,5	15,7	30,6	1,4

¹ Revised figures.² Preliminary figures.Table 2 – Principal statistics by type of service in the forestry, logging and related services industry, 2017²

	Total income	Total current expenditure	Total value of opening inventory	Total value of closing inventory	Net profit before tax	Carrying value of assets at the beginning of the financial year	Carrying value of assets at the end of the financial year	Capital expenditure on assets	Number of employees
	R million								Number
Forestry and related services	23 741	19 651	1 397	1 662	4 355	9 531	10 393	2 021	33 982
Logging and related services	879	836	5	1	39	269	291	75	4 466
Total	24 620	20 487	1 402	1 663	4 394	9 800	10 684	2 096	38 448

² Preliminary figures.

Table 3 – Profit margin in the forestry, logging and related services industry 2015 and 2017

Type of service	Turnover		Net profit after tax		Profit margin	
	2015 ¹	2017 ²	2015 ¹	2017 ²	2015 ¹	2017 ²
	R million				%	
Forestry and related services	14 875	19 448	1 776	3 148	11,9	16,2
Logging and related services	728	840	46	35	6,3	4,2
Total	15 603	20 288	1 822	3 183	11,7	15,7

¹ Revised figures.² Preliminary figures.**Table 4 – Income in the forestry, logging and related services industry, 2015 and 2017**

Type of income	2015 ¹		2017 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Sales of goods	13 309	75,3	16 861	68,5	12,6
Services rendered	2 283	12,9	3 386	13,8	21,8
Profit on financial and other assets, liabilities and foreign exchange	1 445	8,2	4 060	16,5	67,6
Other income	627	3,5	313	1,3	-29,3
Total income	17 664	100,0	24 620	100,0	18,1

¹ Revised figures.² Preliminary figures.**Table 5 – Income by type of service in the forestry, logging and related services industry, 2017²**

Type of service	Sales of goods	Services rendered	Profit on financial and other assets, liabilities and foreign exchange	Other income	Total income
	R million				
Forestry and related services	16 837	2 572	4 041	291	23 741
Logging and related services	24	814	19	22	879
Total	16 861	3 386	4 060	313	24 620

² Preliminary figures.

Table 6 – Income by size group in the forestry, logging and related services industry, 2017²

Type of service	Large enterprises	Medium enterprises	Small enterprises	Micro enterprises	Total
	R million				
Forestry and related services	21 576	763	1 063	339	23 741
Logging and related services	678	66	135	0	879
Total	22 254	829	1 198	339	24 620

² Preliminary figures.**Table 7 – Inventory in the forestry, logging and related services industry, 2015 and 2017**

Type of inventory	2015 ¹	2017 ²	Annualised % change
	R million		
Total opening values	1 229	1 402	6,8
Raw materials or materials for processing, packaging materials, fuel, consumables and maintenance stores (e.g. spares)	530	717	16,3
Work in progress	378	373	-0,7
Finished goods produced by this enterprise	311	307	-0,6
Finished goods not produced by this enterprise, but purchased for resale	10	5	-29,3
Total closing values	1 285	1 663	13,8
Raw materials or materials for processing, packaging materials, fuel, consumables and maintenance stores (e.g. spares)	607	863	19,2
Work in progress	345	380	4,9
Finished goods produced by this enterprise	324	410	12,5
Finished goods not produced by this enterprise, but purchased for resale	9	10	5,4

¹ Revised figures.² Preliminary figures.

Table 8 – Expenditure in the forestry, logging and related services industry, 2015 and 2017

Type of expenditure	2015 ¹		2017 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Purchases	5 490	36,1	7 367	36,0	15,8
Salaries and wages	3 184	20,9	3 974	19,4	11,7
Payment to labour brokers and subcontractors	737	4,8	1 092	5,3	21,7
Depreciation and amortisation provided for	948	6,2	1 107	5,4	8,1
Interest paid	321	2,1	601	2,9	36,8
Rental and leasing of livestock, land, buildings and other structures, plant machinery and vehicles under operating leases	309	2,0	395	1,9	13,1
Repair and maintenance	710	4,7	688	3,4	-1,6
Railage and transport out	1 037	6,8	1 668	8,1	26,8
Other expenditure	2 491	16,4	3 595	17,5	20,1
Total expenditure	15 227	100,0	20 487	100,0	16,0

¹ Revised figures.

² Preliminary figures.

Table 9 – Details of assets, equity and liabilities in the forestry, logging and related services industry, 2015 and 2017

Type of assets, equity and liabilities	2015 ¹		2017 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Non-current assets					
Property, plant and equipment and intangible assets (including quota rights), excluding goodwill	7 915	29,4	10 646	30,7	16,0
Long-term investments	926	3,4	1 764	5,1	38,0
Other non-current assets, including biological assets	12 293	45,7	15 603	45,0	12,7
Total non-current assets	21 134	78,6	28 013	80,8	15,1
Current assets					
Trade and other receivables	2 524	9,4	2 837	8,2	6,0
Cash and bank	606	2,3	642	1,9	2,9
Inventory, excluding biological assets	1 331	5,0	1 585	4,6	9,1
Other current assets	1 283	4,8	1 614	4,7	12,2
Total current assets	5 744	21,4	6 678	19,2	7,8
Total assets	26 878	100,0	34 691	100,0	13,6
Equity, including minority interest	14 017	52,2	17 934	51,7	13,1
Non-current liabilities					
Long-term liabilities	2 009	7,5	4 539	13,1	50,3
Other non-current liabilities	6 529	24,3	6 947	20,0	3,2
Total non-current liabilities	8 538	31,8	11 486	33,1	16,0
Current liabilities					
Trade and other payables	2 056	7,6	2 574	7,4	11,9
Bank overdraft	1 057	3,9	1 529	4,4	20,3
Other current liabilities	1 210	4,5	1 168	3,4	-1,8
Total current liabilities	4 323	16,1	5 271	15,2	10,4
Total of equity and liabilities	26 878	100,0	34 691	100,0	13,6

¹ Revised figures.² Preliminary figures.

Table 10 – Carrying value (book value) of assets, at the end of the financial year, in the forestry, logging and related services industry, 2015 and 2017

Type of asset	2015 ¹		2017 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Land and buildings	1 795	22,5	2 903	27,2	27,2
Motor vehicles and other transport equipment	475	5,9	680	6,4	19,6
Plant, machinery, furniture and other office equipment	4 970	62,2	6 174	57,8	11,5
Other assets	748	9,4	927	8,7	11,3
Total	7 988	100,0	10 684	100,0	15,7

¹ Revised figures.² Preliminary figures.**Table 11 – Capital expenditure on new assets in the forestry, logging and related services industry, 2015 and 2017**

Type of asset	2015 ¹		2017 ²		Annualised % change
	R million	% contribution	R million	% contribution	
Land and buildings	133	10,8	232	11,1	32,1
Motor vehicles and other transport equipment	174	14,2	252	12,0	20,3
Plant, machinery, furniture and other office equipment	286	23,3	567	27,1	40,8
Other assets	636	51,7	1 045	49,9	28,2
Total	1 229	100,0	2 096	100,0	30,6

¹ Revised figures.² Preliminary figures.

Table 12 – Employment in the forestry, logging and related services industry as at the end of June 2015 and 2017

Type of employment	Male employees		Female employees		Total employees		Annualised % change
	2015 ¹	2017 ²	2015 ¹	2017 ²	2015 ¹	2017 ²	
	Number						
Permanent and working proprietors	23 732	23 810	10 782	11 566	34 514	35 376	1,2
Temporary and casual/seasonal	1 638	2 359	1 244	713	2 882	3 072	3,2
Total	25 370	26 169	12 026	12 279	37 396	38 448	1,4

¹ Revised figures.² Preliminary figures.**Table 13 – Employment by status in the forestry, logging and related services industry, as at the end of June 2017²**

Type of service	Permanent and working proprietors	Temporary and casual / seasonal	Total
	Number		
Forestry and related services	31 306	2 676	33 982
Logging and related services	4 070	396	4 466
Total	35 376	3 072	38 448

² Preliminary figures.**Table 14 – Employment by enterprise size in the forestry, logging and related services industry, as at the end of June 2017²**

Type of service	Large enterprises	Medium enterprises	Small enterprises	Micro enterprises	Total
	Number				
Forestry and related services	24 676	3 415	4 219	1 672	33 982
Logging and related services	2 849	380	1 237	0	4 466
Total	27 525	3 795	5 456	1 672	38 448

² Preliminary figures.

Explanatory notes

Background	<p>The results presented in this publication have been derived from the 2017 forestry, logging and related services large sample survey. This is a periodic survey which measures economic activity in the forestry, logging and related services sector of the South African economy. This survey is based on a census of private enterprises operating in forestry, logging and related services.</p> <p>The census was conducted from Stats SA's business register. The business register is based mainly on the value-added tax (VAT) database of the South African Revenue Service (SARS). Enterprises are legally bound to register for VAT.</p>
Value-added tax (VAT)	All figures exclude value-added tax (VAT).
Reference period	The information was collected from enterprises for their financial year which ended on any date between 1 July 2016 and 30 June 2017.
Purpose of the survey	Results of the survey are used within Stats SA for compiling the gross domestic product (GDP) and its components. These statistics are also used by government policy advisers in monitoring the performance and contribution of individual industries to the South African economy and the effectiveness of industry policies. The private sector uses the results for comparative business analysis and industry performance.
Classification by industry	The 1993 edition of the <i>Standard Industrial Classification of All Economic Activities</i> (SIC), Fifth Edition, Report No. 09-09-02, was used to classify the statistical units in the survey. The SIC is based on the 1990 <i>International Standard Industrial Classification of All Economic Activities</i> (ISIC) with suitable adaptations for local conditions. Statistics in this publication are presented at 3-digit SIC level (major group). Each enterprise is classified to an industry which reflects its predominant activity.
Statistical unit	The statistical unit for the collection of the information is an enterprise. An enterprise is a legal unit (or a combination of legal units) that includes and directly controls all functions necessary to carry out its activities.
Stratum	A stratum is constructed by concatenating the SIC classification and size group variables.
Size groups	The enterprises are divided into four size groups according to the value of turnover recorded for them on the Stats SA business register. Large enterprises are those with an annual recorded turnover of R22,5 million and above. Table 15 presents the size groups defined using the Department of Trade and Industry (DTI) cut-off points multiplied by three.

Table 15 – Size groups for the forestry, logging and related services industry

Size Group	VAT Turnover
1	Turnover \geq R22 500 000
2	R 13 500 000 \leq turnover $<$ R22 500 000
3	R2 250 000 \leq turnover $<$ R13 500 000
4	Turnover $<$ R2 250 000

Survey methodology and design	<p>The census of enterprises in forestry, logging and related services was conducted by email, telephone and personal visits.</p> <p>A census was conducted from a frame of approximately 480 enterprises. The enterprises were first stratified at 3-digit level according to the SIC and then by size of enterprise. Turnover as recorded on the business register was used as the measure of size for stratification.</p>
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Collection rate	Collection rate = ((collected units + finalised investigations) / sample size) x 100. The collection rate was 77,7%.																						
Turnover collection rate	Turnover collection rate = ((weighted collected units BR turnover + weighted finalised investigations BR turnover) / population turnover) x 100. The turnover collection rate was 96,5%.																						
Weighting methodology	All the enterprises were each assigned a weight of one because all strata were completely enumerated (i.e. a census of the industry was conducted).																						
Revisions to 2015 results	Revisions were made to previous results due to editing and new information obtained after publication.																						
Non-sampling errors	Inaccuracies may occur because of imperfections in reporting by enterprises and errors made in the collection and processing of the data. Inaccuracies of this kind are referred to as non-sampling errors. Every effort is made to minimise non-sampling errors by careful design of questionnaires, testing them in pilot studies, editing reported data and implementing efficient operating procedures. Non-sampling errors occur in both sample surveys and censuses.																						
Rounding-off of figures	The figures in the tables have, where necessary, been rounded off to the nearest final digit shown. There may therefore be slight discrepancies between the sums of the constituent items and the totals shown.																						
Symbols and abbreviations	<table> <tr> <td>DTI</td> <td>Department of Trade and Industry</td> </tr> <tr> <td>GDP</td> <td>Gross domestic product</td> </tr> <tr> <td>ISIC</td> <td>International Standard Industrial Classification of All Economic Activities</td> </tr> <tr> <td>IT</td> <td>Income tax</td> </tr> <tr> <td>SARS</td> <td>South African Revenue Service</td> </tr> <tr> <td>BR</td> <td>Business register</td> </tr> <tr> <td>SIC</td> <td>Standard Industrial Classification of all Economic Activities</td> </tr> <tr> <td>SNA</td> <td>System of National Accounts</td> </tr> <tr> <td>Stats SA</td> <td>Statistics South Africa</td> </tr> <tr> <td>VAT</td> <td>Value added tax</td> </tr> <tr> <td>0</td> <td>Nil or less than half the final digit shown</td> </tr> </table>	DTI	Department of Trade and Industry	GDP	Gross domestic product	ISIC	International Standard Industrial Classification of All Economic Activities	IT	Income tax	SARS	South African Revenue Service	BR	Business register	SIC	Standard Industrial Classification of all Economic Activities	SNA	System of National Accounts	Stats SA	Statistics South Africa	VAT	Value added tax	0	Nil or less than half the final digit shown
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Glossary

Employees	Persons employed by the business or organisation who received payment (in salaries, wages, commission, piece rates or payments in kind) for the last pay period ended on or before 30 June 2017.
Permanent employees	Employees appointed on an open-ended contract with no stipulated termination date or a fixed-term contract for periods of more than one year.
Temporary employees	Temporary employees are employees appointed on a short-term contract basis with a stipulated termination date for periods not exceeding one year.
Casual employees	Employees who fall neither within the 'permanent employees' category nor the 'temporary employees' category. Such employees are typically working daily or hourly.
Turnover	Turnover includes: <ul style="list-style-type: none">• value of sales of goods;• amount received for services rendered; and• income from rental, leasing and hiring.
Other income	Other income includes: <ul style="list-style-type: none">• rental, leasing and hiring income;• interest received;• dividends;• rebates; and• other.
Other expenditure	Other expenditure includes: <ul style="list-style-type: none">• accounting and/or auditing fees;• advertising and marketing expenses;• bank charges;• consulting fees;• import and export costs;• insurance premiums;• losses on financial and other assets;• losses on financial and other liabilities;• losses on foreign exchange;• management and administrative fees;• membership or affiliation costs;• motor vehicle running expenditure;• research and development costs;• security services;• storage costs;• information and communication technology services;• electricity, property rates and water costs; and• other.

Non-current assets	Assets not expected to be converted into cash, sold or exchanged within the normal 12-month operating cycle of the enterprise. They include: <ul style="list-style-type: none">• Property, plant and equipment and intangible assets;• Long-term investments; and• Other non-current assets.
Current assets	These are assets that can be converted into cash within 12 months. They include: <ul style="list-style-type: none">• Trade and other receivables;• Cash and bank;• Inventory, excluding biological assets; and• Other current assets.
Equity	Residual interest in the enterprise's assets after deducting its liabilities.
Non-current liabilities	Liabilities that are not required to be paid within 12 months. They include: <ul style="list-style-type: none">• Long-term loans; and• Other non-current liabilities.
Current liabilities	These are debts or obligations that are due within 12 months. They include: <ul style="list-style-type: none">• Trade and other payables;• Bank overdraft; and• Other current liabilities.

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