

DISCUSSION DOCUMENT
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Survey of ocean (marine) fisheries and related services

2015

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ENQUIRIES:
Siyabonga Ngcobo
012 337 6322

www.statssa.gov.za
info@statssa.gov.za
T +27 12 310 8911
F +27 12 310 8500

Private Bag X44, Pretoria, 0001, South Africa
ISibalo House, Koch Street, Salvokop, Pretoria, 0002

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Survey of ocean (marine) fisheries and related services survey, 2014 and 2015

1. Introduction

Statistics South Africa conducted a pilot survey of the ocean (marine) fisheries and related services industry for the two reference years 2014 and 2015. The surveys aimed to determine the nature and structure of the ocean (marine) fisheries and related services industry. Financial, employment and product information was collected. This information is used in developing plans and policies to grow the industry, stabilise prices, create jobs and promote investment.

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

For example the corresponding tonnage of fish caught as reported in Table 7 on page 15 is lower than that reported in *The Status of the South African Marine Fishery Resources, 2014* by the Department of Agriculture, Forestry and Fisheries (DAFF). Tonnage of hake caught, as reported by DAFF between 2000 and 2012, ranged between 111 000 and 158 000 tons. The pilot survey reports much lower tonnages of 31 000 and 40 000 tons in 2014 and 2015 respectively.

There is a likely need for an up-to-date consolidated list of all companies/individuals licensed for ocean (marine) and aquaculture fishing by DAFF. The list would go a long way in improving the coverage of the overall fishing industry.

1.1 Scope and coverage

This survey covers enterprises mainly engaged in the ocean (marine) fisheries and related services industry, 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. The pilot survey covers ocean and coastal fishing (SIC 131). It excludes fish hatcheries and fish farms (SIC 132).

The pilot is based on enterprises that are included in Statistics South Africa's business register. This register is maintained through taxation data received from the South African Revenue Service. The advantage of using this register is that the scope of the survey is comprehensive as it includes all enterprises registered for tax. A weakness is that the enterprise classification is based on the predominant activity of the enterprise. In this case, significant activity that relates to the fisheries industry occurs in enterprises that are predominantly involved in the manufacturing or trade industries, due to the diverse nature of their business model. The results of this pilot will therefore underestimate the fisheries sector in South Africa as it covers ocean and coastal fishing (SIC 131) only.

1.2 Data items

The following categories of data items were collected: industrial classification, details of employment, trading income, expenditure, profit or loss, inventories, capital expenditure on new assets, details of services rendered, details of purchases, details of assets, owners' equity and liabilities, fishing vessels and fishing equipment.

1.3 Reference period

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

Example, for 2015

- 1 October 2013 – 30 September 2014
- 1 January 2014 – 31 December 2014
- 1 February 2014 – 31 January 2015
- 1 March 2014 – 28 February 2015
- 1 April 2014 – 31 March 2015

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 in this regard 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.

PJ Lehohla

Statistician-General

PRETORIA

2017

2. Summary of findings

Table A – Selected financial statistics in the ocean (marine) fisheries and related services industry, 2014 and 2015

		2014	2015	% change
Total income	R'000	7 449 837	8 996 514	20,8
Net profit before tax	R'000	816 810	1 356 534	66,1
Capital expenditure on new assets	R'000	511 989	606 904	18,5

The total income in the ocean (marine) fisheries and related services industry in 2015 was R8 996,5 million. The figure represents a percentage increase of 20,8% over the total income reported in 2014 (R7 449,8 million).

There was an increase of 66,1% in net profit from R816,8 million in 2014 to R1 356,5 million in 2015. Capital expenditure increased by 18,5% from R512,0 million in 2014 to R606,9 million in 2015.

Table B – Employment at the end of June in the ocean (marine) fisheries and related services industry, 2014 and 2015

	2014	2015	% change
	Number		
Working proprietors (paid and non-paid)	586	631	7,7
Permanent	9 265	10 001	7,9
Temporary	1 354	1 490	10,0
Casual/seasonal	2 977	3 075	3,3
Total	14 182	15 197	7,2

The total number of persons employed in the ocean (marine) fisheries and related services industry in 2015 was 15 197. This represents an increase of 7,2% over the number reported in the corresponding survey of 2014 (14 182).

Table C – Sales and transfers-out of own caught fish, other fish products and kelp in the ocean (marine) fisheries and related services industry, 2014 and 2015

	2014		2015	
	R' 000	% contribution	R' 000	% contribution
Hake	773 212	30,4	1 039 758	33,2
Squid	281 734	11,1	414 528	13,2
Pilchard	64 845	2,5	106 073	3,4
Anchovy	137 304	5,4	171 876	5,5
South coast rock lobster	184 711	7,3	247 511	7,9
West coast rock lobster	217 886	8,6	255 070	8,1
Cape horse mackerel	306 873	12,0	170 897	5,5
Kelp (brown seaweed / algae)	5 033	0,2	5 756	0,2
Other own caught fish and other fish products	575 351	22,5	723 401	23,0
Total sales and transfers-out of fish	2 546 949	100,0	3 134 870	100,0

The total sales and transfers-out of own caught fish and other fish products increased by 23,1% from R2 546,9 million in 2014 to R3 134,9 million in 2015. Comparing 2014 and 2015, the largest increase was reported for 'hake' (+R266,5 million), followed by 'squid' (+R132,8 million) and 'south coast rock lobster' (+R62,8 million). 'Cape horse mackerel' decreased by R135,9 million.

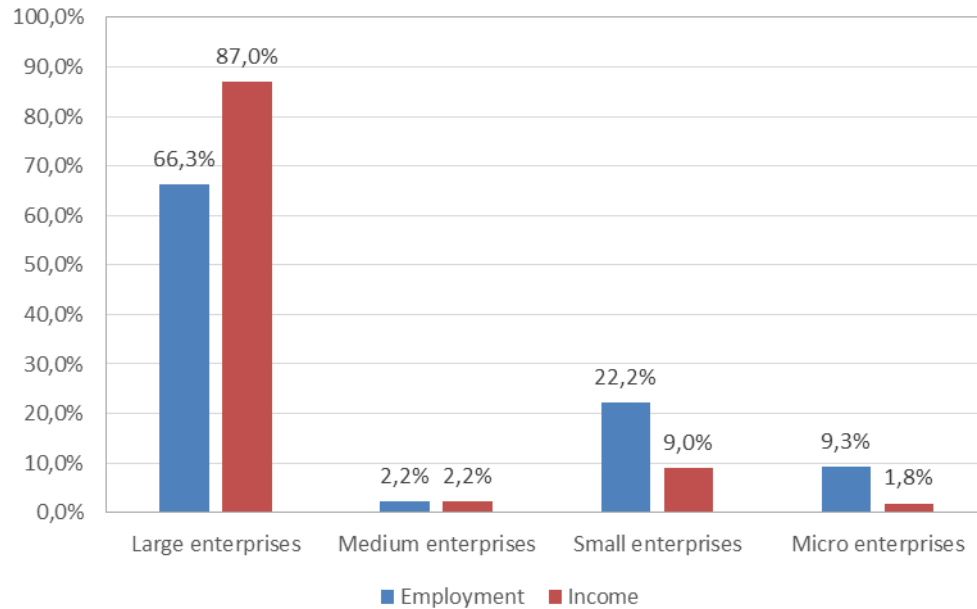
'Hake' sales remained the largest contributor to the total sales and transfers-out of own caught fish and other fish products (30,4% in 2014 and 33,2% in 2015). Kelp (brown seaweed / algae) was the lowest contributor in both 2014 (0,2%) and 2015 (0,2%).

Table D – Sales and transfers-out of processed fish and other sales in the ocean (marine) fisheries and related services industry, 2014 and 2015

	2014		2015	
	R' 000	% contribution	R' 000	% contribution
Crustaceans, live or chilled	177 012	4,8	174 819	3,9
Hake, whole or cuts (e.g. steaks), frozen	510 814	13,9	441 114	9,8
Hake fillets, frozen	744 935	20,2	1 060 186	23,5
Other by-catch fish meat, whole or cuts, frozen	130 167	3,5	195 521	4,3
Fish, canned	294 432	8,0	461 868	10,3
Other minced fish products	460 649	12,5	458 445	10,2
Fish fingers	271 785	7,4	258 151	5,7
Other processed fish	1 089 672	29,7	1 454 984	32,3
Total sales and transfers-out of processed fish	3 679 466	100,0	4 505 088	100,0

The total sales and transfers-out of processed fish and other sales in the ocean (marine) fisheries and related services industry in 2015 was R4 505,1 million. This represents an increase of 22,4% from R3 679,5 million in 2014. The largest increases were reported for 'hake fillets, frozen' (+R315,2 million) and 'fish, canned' (+R167,4 million).

Figure 1 – Employment and income by enterprise size (% contribution) in the fisheries and related services industry, 2015



Whereas large enterprises (those with annual turnover equal to or greater than R22 million) contributed 87,0% of the total income of the ocean (marine) fisheries and related services industry in 2015, their contribution to employment was 66,3%. Although small, medium and micro enterprises (SMMEs) contributed only 13,0% to the total income, their contribution to employment was 33,7%.

3. Tables

Table 1 – Principal statistics in the ocean (marine) fisheries and related services industry, 2014 and 2015

	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 new assets	Number of employees
	R'000								Number
2014	7 449 837	6 750 605	651 889	769 467	816 810	1 861 384	2 020 942	511 989	14 182
2015	8 996 514	7 768 729	774 642	903 391	1 356 534	2 104 052	2 367 244	606 904	15 197
% change	20,8	15,1	18,8	17,4	66,1	13,0	17,1	18,5	7,2

Table 2 – Details of income in the ocean (marine) fisheries and related services industry, 2014 and 2015

	2014		2015		% change
	R'000	% contribution	R'000	% contribution	
Sales of goods	6 730 810	90,3	8 091 869	89,9	20,2
Services rendered	135 928	1,8	143 669	1,6	5,7
Interest received	49 419	0,7	51 363	0,6	3,9
Dividends received	178 814	2,4	226 470	2,5	26,7
Profits on foreign exchange and financial and other assets	80 373	1,1	103 475	1,2	28,7
Rebates	27 484	0,4	33 273	0,4	21,1
Other income	247 009	3,3	346 395	3,8	40,2
Total	7 449 837	100,0	8 996 514	100,0	20,8

Table 3 – Details of expenditure in the ocean (marine) fisheries and related services industry, 2014 and 2015

	2014		2015		% change
	R'000	% contribution	R'000	% contribution	
Purchases	2 550 110	37,8	3 160 175	40,7	23,9
Salaries, wages and bonuses	1 612 412	23,9	1 897 430	24,4	17,7
Payment to subcontractors	115 608	1,7	127 195	1,6	10,0
Depreciation	297 541	4,4	294 685	3,8	-1,0
Insurance premiums	73 229	1,1	74 826	1,0	2,2
Interest paid	85 837	1,3	86 916	1,1	1,3
Repair and maintenance	371 329	5,5	458 534	5,9	23,5
Transport	148 226	2,2	193 063	2,5	30,2
Electricity	93 095	1,4	97 420	1,3	4,6
Other expenditure	1 403 218	20,7	1 378 485	17,7	-1,8
Total	6 750 605	100,0	7 768 729	100,0	15,1

Table 4 – Details of assets, owners' equity and liabilities in the ocean (marine) fisheries and related services industry, 2014 and 2015

	2014		2015		% change
	R'000	% contribution	R'000	% contribution	
Total non-current assets	3 621 761	53,5	4 062 915	52,7	12,2
Property, plant and equipment and intangible assets excluding goodwill	1 971 426	29,1	2 314 052	30,0	17,4
Goodwill	47 178	0,7	50 961	0,7	8,0
Long-term investments	1 054 331	15,6	1 137 620	14,7	7,9
Other non-current assets	548 826	8,1	560 282	7,3	2,1
Total current assets	3 151 822	46,5	3 653 294	47,3	15,9
Trade and other receivables	1 222 228	18,0	1 511 127	19,6	23,6
Cash and bank	342 809	5,1	304 667	3,9	-11,1
Inventory	770 863	11,4	903 626	11,7	17,2
Other current assets	815 922	12,0	933 874	12,1	14,5
Total assets	6 773 583	100,0	7 716 209	100,0	13,9
Owners' equity	2 386 423	35,3	2 795 145	36,2	17,1
Total non-current liabilities	2 169 356	32,0	2 222 246	28,8	2,4
Long-term liabilities	954 969	14,1	1 138 542	14,8	19,2
Other non-current liabilities	1 214 387	17,9	1 083 704	14,0	-10,8
Total current liabilities	2 217 804	32,7	2 698 818	35,0	21,7
Trade and other payables	1 571 805	23,2	1 958 281	25,4	24,6
Bank overdraft	77 520	1,1	200 689	2,6	158,9
Other current liabilities	568 479	8,4	539 848	7,0	-5,0
Total equity and liabilities	6 773 583	100,0	7 716 209	100,0	13,9

Table 5 – Carrying value of assets at the end of the financial year in the ocean (marine) fisheries and related services, 2014 and 2015

	2014		2015		% change
	R'000	% contribution	R'000	% contribution	
Land, buildings and construction works	143 029	7,1	150 301	6,4	5,1
Computers and other IT equipment	25 539	1,3	23 652	1,0	-7,4
Motor vehicles and other transport equipment	930 791	46,0	1 184 443	50,0	27,3
Plant, machinery, furniture and other office equipment	536 834	26,6	553 402	23,4	3,1
Intangible non-produced assets	253 089	12,5	240 021	10,1	-5,2
Other intangible assets	21 426	1,1	18 829	0,8	-12,1
Other assets	110 234	5,4	196 596	8,3	78,3
Total	2 020 942	100,0	2 367 244	100,0	17,1

Table 6 – Details of employees in the ocean (marine) fisheries and related services industry, 2014 and 2015

	2014			2015			% change
	Female	Male	Total	Female	Male	Total	
	Number						
Working proprietors (paid and non-paid)	99	487	586	99	532	631	7,7
Permanent	2 248	7 017	9 265	2 298	7 703	10 001	7,9
Temporary	773	581	1 354	1 037	453	1 490	10,0
Casual/seasonal	681	2 296	2 977	851	2 224	3 075	3,3
Total	3 801	10 381	14 182	4 285	10 912	15 197	7,2

Table 7 – Details of sales and transfers-out of own caught fish, processed fish, kelp and other sales in the ocean (marine) fisheries and related services industry, 2014 and 2015

	2014		2015	
	Metric tons	R'000	Metric tons	R'000
Hake	31 287	773 212	40 471	1 039 758
Squid	3 729	281 734	5 065	414 528
Pilchard	22 561	64 845	27 503	106 073
Anchovy	72 143	137 304	82 317	171 876
South coast rock lobster	281	184 711	356	247 511
West coast rock lobster	1 469	217 886	1 072	255 070
Cape horse mackerel	24 986	306 873	13 818	170 897
Kelp (brown seaweed/algae)	3 308	5 033	3 786	5 756
Other own caught fish and other fish products	42 785	575 351	54 134	723 401
Total sales and transfers-out of own caught fish	202 549	2 546 949	228 522	3 134 870
Crustaceans, live or chilled	397	177 012	376	174 819
Hake, whole or cuts (e.g. steaks), frozen	15 475	510 814	12 108	441 114
Hake fillets, frozen	13 738	744 935	16 813	1 060 186
Other by-catch fish meat, whole or cuts, frozen	6 213	130 167	6 732	195 521
Fish, canned	14 803	294 432	21 160	461 868
Other minced fish products	9 186	460 649	8 913	458 445
Fish fingers	7 058	271 785	6 746	258 151
Other processed fish	36 399	1 089 672	49 803	1 454 984
Total sales and transfers-out of processed fish	103 269	3 679 466	122 651	4 505 088
Other sales		504 395		451 911
Total sales		6 730 810		8 091 869

Table 8 – Details of income from services in the ocean (marine) fisheries and related services industry, 2014 and 2015

	2014		2015		% change
	R'000	% contribution	R'000	% contribution	
Services related to marine fisheries	13 149	9,7	14 415	10,0	9,6
Quota fees received	15 014	11,0	15 211	10,6	1,3
Catch fees received	75 885	55,8	76 087	53,0	0,3
Cold storage	2 108	1,6	1 552	1,1	-26,4
Processing fees received	15 971	11,7	17 110	11,9	7,1
Other services	13 801	10,2	19 294	13,4	39,8
Total income from services	135 928	100,0	143 669	100,0	5,7

Table 9 – Details of purchases in the ocean (marine) fisheries and related services industry, 2014 and 2015

	2014		2015		% change
	R'000	% contribution	R'000	% contribution	
Victual for crew	43 791	1,7	50 257	1,6	14,8
Protective clothing for employees	16 809	0,7	20 971	0,7	24,8
Spare (replacement) parts for fishing equipment and other maintenance	210 029	8,2	240 311	7,6	14,4
Fuel lubricants and greases	812 573	31,9	977 754	30,9	20,3
Coal and gas	46 253	1,8	55 298	1,7	19,6
Containers, pallets and packaging materials	298 184	11,7	344 106	10,9	15,4
Fishing gear	57 393	2,3	70 516	2,2	22,9
Dry ice	12 886	0,5	15 896	0,5	23,4
Bait/lures	20 678	0,8	27 402	0,9	32,5
Fish (live for resale)	777 176	30,5	1 036 686	32,8	33,4
Ingredients for processing	107 540	4,2	133 791	4,2	24,4
Other purchases	146 798	5,7	187 187	6,0	27,5
Total	2 550 110	100,0	3 160 175	100,0	23,9

Table 10 – Fishing vessels and fishing equipment in the ocean (marine) fisheries and related services industry, 2014 and 2015

	Fishing vessels	Book value of fishing vessels	Book value of fishing gear	Total
	Number	R'000		
2014	326	927 833	23 915	951 748
2015	376	1 253 231	16 857	1 270 088
% change	15,3	35,1	-29,5	33,4

Explanatory notes

Background

The results presented in this publication have been derived from the 2014 and 2015 ocean (marine) fisheries and related services surveys. This survey was based on a census of enterprises operating in the ocean (marine) fisheries and related services industry.

The census was drawn from Stats SA's business register (BR). Stats SA continuously updates its business register, based on the units registered for value added tax (VAT).

All figures exclude value added tax (VAT).

Reference period

The information for 2014 was collected from enterprises for their financial year which ended on any date between 1 July 2013 and 30 June 2014. Similarly, the information for 2015 was collected from enterprises for their financial year which ended on any date between 1 July 2014 and 30 June 2015.

Purpose of the survey

The results are mainly used to monitor trends in the ocean (marine) fisheries and related services industry and to benchmark national accounts aggregates, e.g. gross domestic product (GDP).

Users and uses of the ocean (marine) fisheries and related services survey include:

- Policy advisers in government for monitoring the performance of industry and the contribution to the South African economy, and for evaluating the effectiveness of industry policies;
- Industry associations monitoring trends on their own and competing or complementary industries in order to inform their members of market changes; and
- Individual businesses using the data to analyse their performance relative to their industry.

Scope and coverage

This survey covers enterprises registered in the taxation system that are mainly engaged in ocean (marine) fisheries and related services. It includes the following major groups within its scope:

- (i) Ocean and coastal fishing (SIC 131).

Including

- South African-based activities of enterprises which operate in multiple countries.

Excluding

- Activities of South African-based companies in other countries.

Classification by industry

The 1993 edition of the *Standard Industrial Classification of all Economic Activities* (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 *International Standard Industrial Classification of all Economic Activities* (ISIC) with suitable adaptations for local conditions. Each enterprise is classified to an industry which reflects its predominant activity.

Statistical unit The survey's data were collected at an enterprise level. An enterprise is a legal unit or a combination of legal units that includes and directly controls all functions necessary to carry out its production activities.

Size groups The enterprises are divided into four size groups according to turnover as recorded on Stats SA's BR. Large enterprises are those with an annual recorded turnover above R22,5 million. Table E presents size groups defined using Department of Trade and Industry (DTI) cut-off points multiplied by 4,5.

Table E – Size groups for the ocean (marine) fisheries and related services survey 2015

Size group	Turnover
Large	Turnover > R22 500 000
Medium	R13 500 000 < turnover ≤ R22 500 000
Small	R2 250 000 < turnover ≤ R13 500 000
Micro	Turnover ≤ R2 250 000

Survey methodology and design The survey was conducted by post, email, fax, telephone and personal visits.
Enterprises were stratified using three-digit level according to the SIC and by size of enterprise. Business register turnover was used as a measure of size for stratification.

Collection rate Collection rate = ((collected enterprises + finalised investigations)/ sample size)*100. The collection rate was 83,3%.

Turnover collection rate Turnover collection rate = ((weighted collected enterprises BR turnover + weighted finalised investigations BR turnover)/ population turnover)*100. The turnover collection rate was 97,2%.

Weighting methodology All the enterprises were each assigned a weight of one because a census of the industry was conducted.

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

BR	Business register
DTI	Department of Trade and Industry
GDP	Gross domestic product
IT	Income tax
0	Nil or less than half the final digit shown
SARS	South African Revenue Service
Stats SA	Statistics South Africa
VAT	Value added tax
–	Figures not available

Glossary

Current assets	<p>These are assets that can be converted into cash within 12 months. They include:</p> <ul style="list-style-type: none">• Trade and other receivables;• Cash and bank;• Inventory; and• Other current assets.
Current liabilities	<p>These are debts or obligations that are due within 12 months. They include:</p> <ul style="list-style-type: none">• Trade and other payables;• Bank overdraft; and• Other current liabilities.
Employees	<p>People who are employed by the enterprise who received payment (in salaries, wages, commission, piece rates or payments in kind) for any part of the reference period (excluding independent contractors).</p>
Enterprise	<p>A legal unit or a combination of legal units that includes and directly controls all functions necessary to carry out its production activities.</p>
Equity	<p>Residual interest in the enterprise's assets after deducting its liabilities.</p>
Industry	<p>An industry consists of a group of enterprises engaged in the same or similar kinds of economic activity. Industries are defined in the <i>System of National Accounts (SNA)</i> in the same way as in the <i>Standard industrial Classification of all Economic activities (SIC)</i>, Fifth Edition, Report No. 09-90-02 of January 1993.</p>
Non-current assets	<p>Assets not expected to be converted into cash, sold or exchanged within the normal 12-month operating cycle of the enterprise. They include:</p> <ul style="list-style-type: none">• Property, plant and equipment and intangible assets;• Goodwill;• Long-term investments; and• Other non-current assets.
Non-current liabilities	<p>Liabilities that are not required to be paid within 12 months. They include:</p> <ul style="list-style-type: none">• Long-term loans; and• Other non-current liabilities.
Other assets	<p>Includes:</p> <ul style="list-style-type: none">• Other intangible assets

Other current expenditure

Includes:

- Accommodation;
- Bursaries;
- Consulting;
- Donations and sponsorships;
- Entertainment;
- Imports and exports;
- Losses on financial and other assets;
- Professional services (e.g. legal services and data processing services);
- Property rates;
- Regional service levels; and
- Storage.

Other income

Includes:

- Profits on financial and other liabilities; and
- Accommodation.

Sales of goods

Includes:

- Income from sales and transfers-out of own caught fish and other products;
- Income from the sales and transfers-out of processed fish ; and
- Other sales.

Services rendered

Includes:

- Services related to marine fisheries;
- Quota fees received;
- Catch fees received;
- Processing fees received;
- Cold storage; and
- Other services (e.g. grading and sorting of fish).

General information

Stats SA publishes approximately 300 different statistical releases each year. It is not economically viable to produce them in more than one of South Africa's 11 official languages. Since the releases are used extensively, not only locally but also by international economic and social-scientific communities, Stats SA releases are published in English only.

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Email address: info@statssa.gov.za (user information services)
magdaj@statssa.gov.za (orders)
siyabongangc@statssa.gov.za (technical enquiries)
edmundk@statssa.gov.za (technical enquiries)

Postal address: Private Bag X44, Pretoria, 0001