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Survey of Large Scale Agriculture 2005 (Preliminary)

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Please note:

The information covered in the statistical release for the survey of large scale agriculture 2005 was collected only from enterprises within the commercial large scale farming sector that had an annual gross farming income of R2 million and above.

In this publication, Statistics South Africa releases the first results of a survey of the large scale agriculture sector for the financial year ending 28 February 2005.

This survey covered enterprises within the large scale agriculture sector that are registered for Value Added Tax (VAT) and/or Income Tax (IT) and are primarily involved in farming activities e.g. growing of field crops, the raising of livestock and the production of milk, eggs and wool.

The results of the survey of large scale agriculture will be used to compile estimates for Department of Agriculture's National Accounts as well as inputs to the Gross Domestic Product (GDP) and its components.

Note: This release excludes all enterprises rendering agricultural services such as harvesting, baling, threshing etc., enterprises engaged in forestry, logging and related services as well as enterprises engaged in ocean and coastal fishing.

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Key findings

Gross farming income

Gross farming income of large-scale farming units was R51,160 million. Figure 1 shows that Western Cape accounted for the largest share (R10 934 million or 21,4%), followed by Free State (7 433 million or 14,5%).

As indicated in Figure 2, 47,4% of the total gross farming income was generated from commercial farming in the animals and animal product division. Horticultural and field crop products were the second and third largest sources of income in the sector, with contributions of 30,5% and 21% respectively.

In North West (R3 294 million), Free State (R2 960 million), and KwaZulu-Natal (R2 904 million), most of the farming income was generated from animal sales. On the other hand, in Western Cape (R5 965 million), Limpopo (R2 425 million) and Mpumalanga (R1 928 million) most of the farming income was generated from horticultural product sales. Sales of field crop products generated most farming income in Free State (R2 905 million), Mpumalanga (R2 087 million) and KwaZulu-Natal (R1 832 million) (Figure 3 and Table 5).

Employment

The number of paid employees in large scale formal agriculture, at the end of the collection period, stood at 614 962 paid employees (Table 2.1). The largest number of paid employees in the large scale agricultural sector worked in the Western Cape (25,3% or 155 424 paid employees), followed by KwaZulu-Natal (13,4% or 82 605 paid employees) and Mpumalanga (13,4% or 82 186 paid employees). Large scale commercial farmers paid R7 044 million in salaries and wages. This amounts to 13,8% of the gross farming income generated in the large scale agricultural sector, and is also 18,9% of its total current expenditure for the same period (Table 1).

The number of owners/proprietors totalled 13 302 (Table 2.2). Total employment (permanent and seasonal employees together with proprietors) was 628 264 (Table 2.1).

There were 322 025 full-time workers and 292 937 casual workers at the end of the collection period. The large scale farming sector in the Western Cape (71 856 workers), KwaZulu-Natal (53 561 workers) and Mpumalanga (46 444 workers) accounted for the highest total number of full-time workers. The sector in Eastern Cape (15 178 workers) and Northern Cape (14 018 workers) accounted for the lowest number of full-time workers. The sector in Western Cape (83 569 workers), Northern Cape (35 984 workers) and Mpumalanga (35 742 workers) accounted for the highest total number of casual workers. The sector in Eastern Cape (13 265 workers) and Gauteng (12 140 workers) accounted for the lowest number of casual workers (Table 2.2).

Expenditure

Total current expenditure by the large scale formal agricultural sector amounted to R37 351 million for the collection period ending February 2005 (see Table 3). Capital expenditure was R2 778 million. The large scale farming sector in the Western Cape (R8 599 million), Free State (R5 139 million) and Mpumalanga (R5 106 million) accounted for the highest total current expenditure for the reporting period. The sector in the Eastern Cape (R1 692 million) and Northern Cape (R1 832 million) accounted for the lowest total current expenditure.

Farming debt, market value of assets and gross farming income

The ratio of farming debt to the market value of farming assets in the large scale farming sector stood at 26% in 2005. The ratio was the highest in Free State (46%), followed by Gauteng (42%) (Table 4).

The ratio of farming debt to gross farming income in the large scale farming sector was 42%. While this ratio varied considerably by province, it was by far the highest in Free State (63%) (Figure 1). Possible factors contributing to the size of the ratio in Free State included:

- Less farming income was generated due to the decrease in field crop produce/plantings (maize, wheat etc.);
- Mechanisation within the agricultural sector causing large scale farmers to incur heavy debt to import/purchase new machinery and equipment.

Farming debt in the large-scale farming sector amounted to R21 288 million. The sector in the Western Cape accounted for 25,1% of the debt, followed by Free State (22,1%), while the Eastern Cape had the lowest proportion of debt (3,8%).

Total value of losses

The large scale farming sector in the Western Cape accounted for the highest level of losses for the collection period ending February 2005 (R169 million), followed by large scale farmers in Mpumalanga (R140 million) and KwaZulu-Natal (R139 million) (see Figure 6 and Table 6).

Comparisons with results of 2002 Census of Commercial Agriculture

Caution is needed in comparing the results of this survey with results from previous surveys and censuses in the agricultural sector because of significant enhancements to the coverage of this survey. A valid basis for comparison is between enterprises included in both the 2002 Census of Commercial Agriculture and the 2005 Survey of Large Scale Agriculture. The results for gross farming income by major division within agricultural and by province are summarised in Figures 4 and 5.

The percentage increase/decrease in gross farming income for the major divisions within agriculture, comparing only enterprises in both the 2002 Census of Commercial Agriculture and 2005 Survey, were 'field crops' (1,3% decrease from 2002 to 2005), 'horticulture' (29,5% increase), 'animals and animal products' (32,1% increase), 'other products' (50,3% decrease) and total gross farming income (22,1% increase) (Figure 4).

Figure 1 – Gross farming income and farming debt per province within agriculture

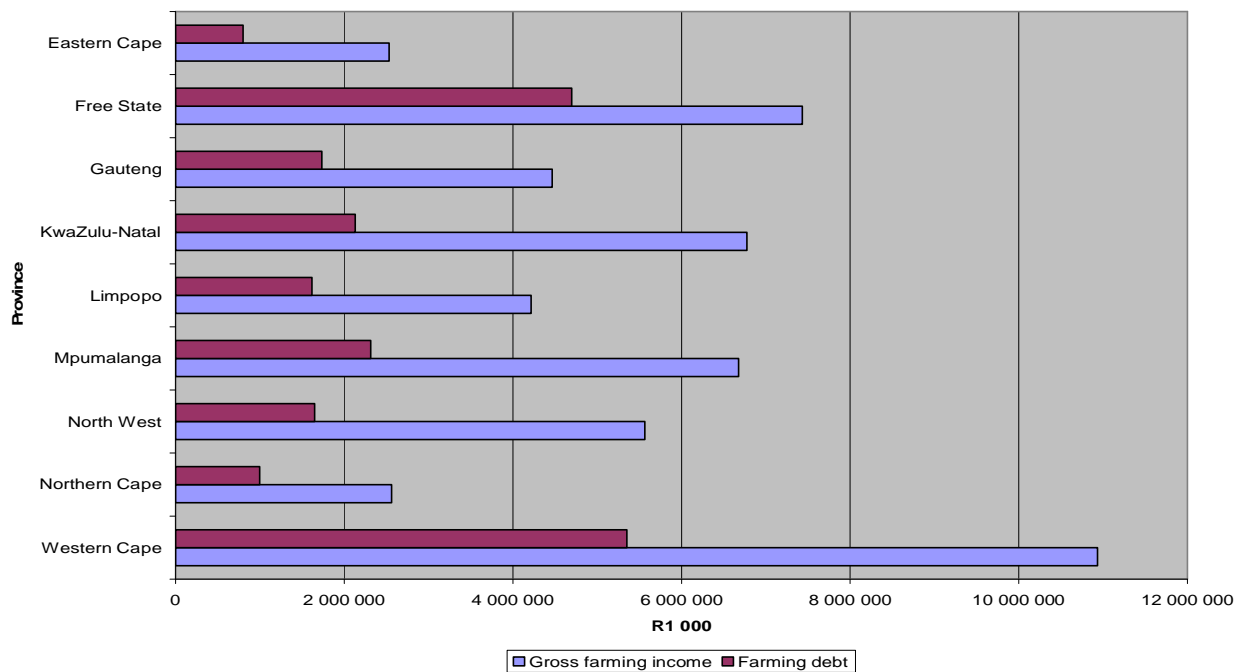


Figure 2 – Percentage distribution of gross farming income by major division within agriculture

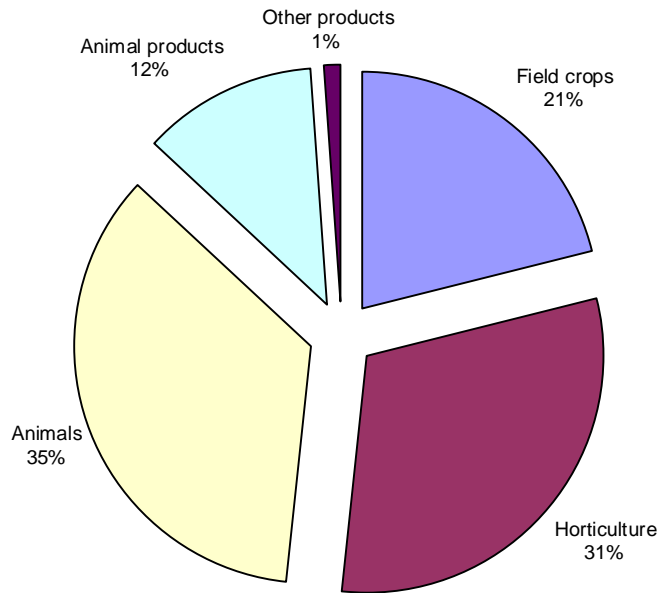


Figure 3 – Breakdown of gross farming income per major division within agriculture, per province

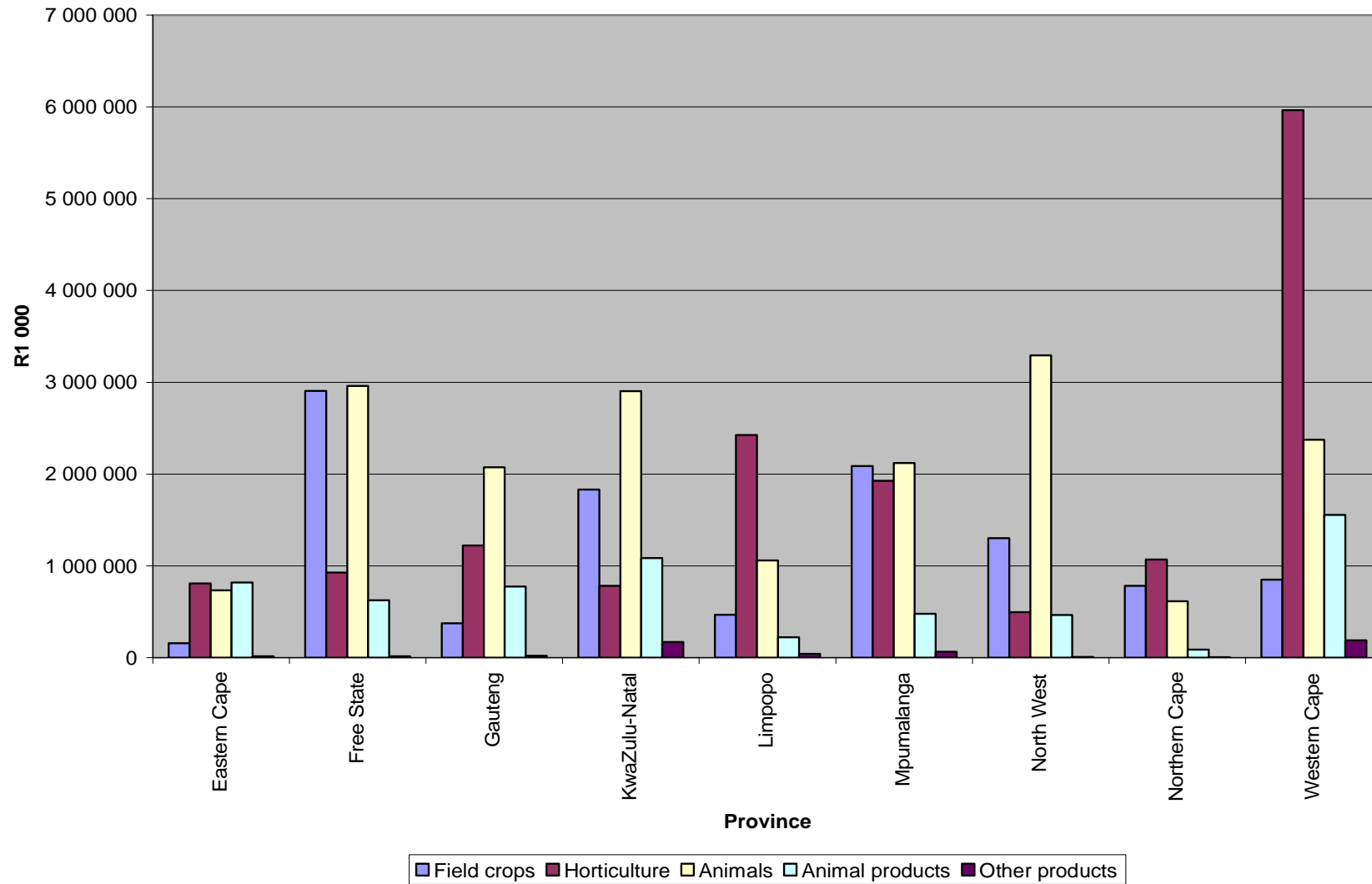


Figure 4 – Percentage increase/decrease of gross farming income by major division within agriculture
 (Comparison confined to enterprises included in both the 2002 Census of Commercial Agriculture and 2005 Survey of Large Scale Agriculture)

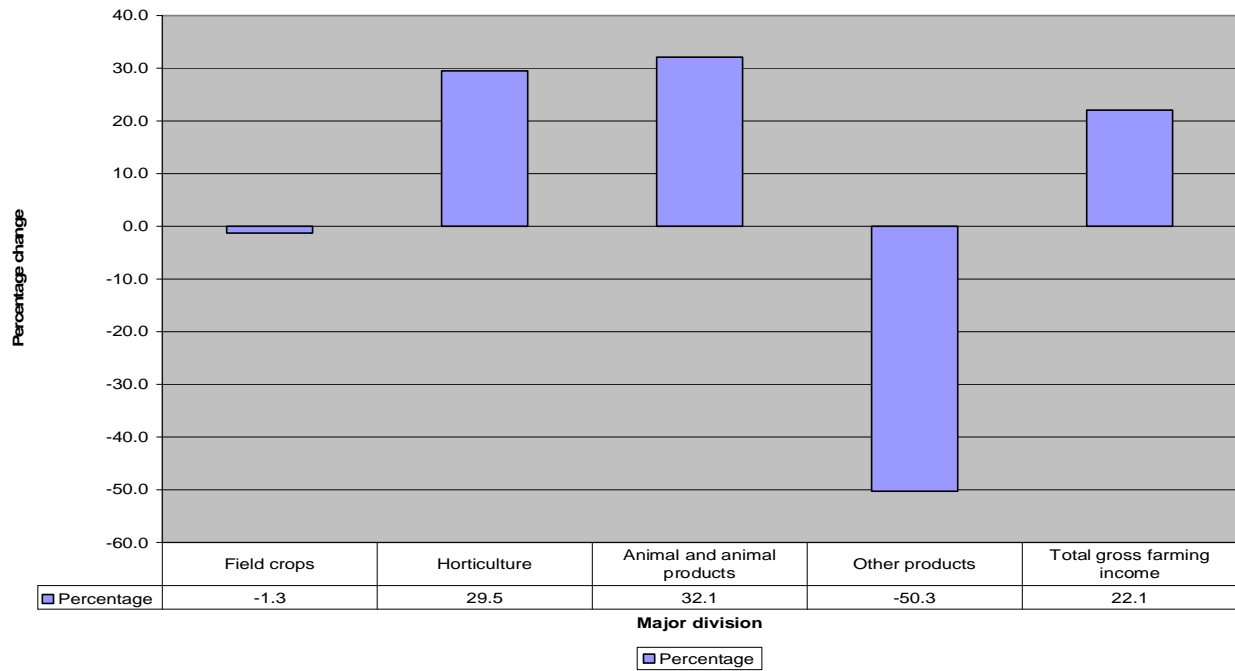


Figure 5 – Percentage increase in total gross farming income by province
 (Comparison confined to enterprises included in both the 2002 Census of Commercial Agriculture and 2005 Survey of Large Scale Agriculture)

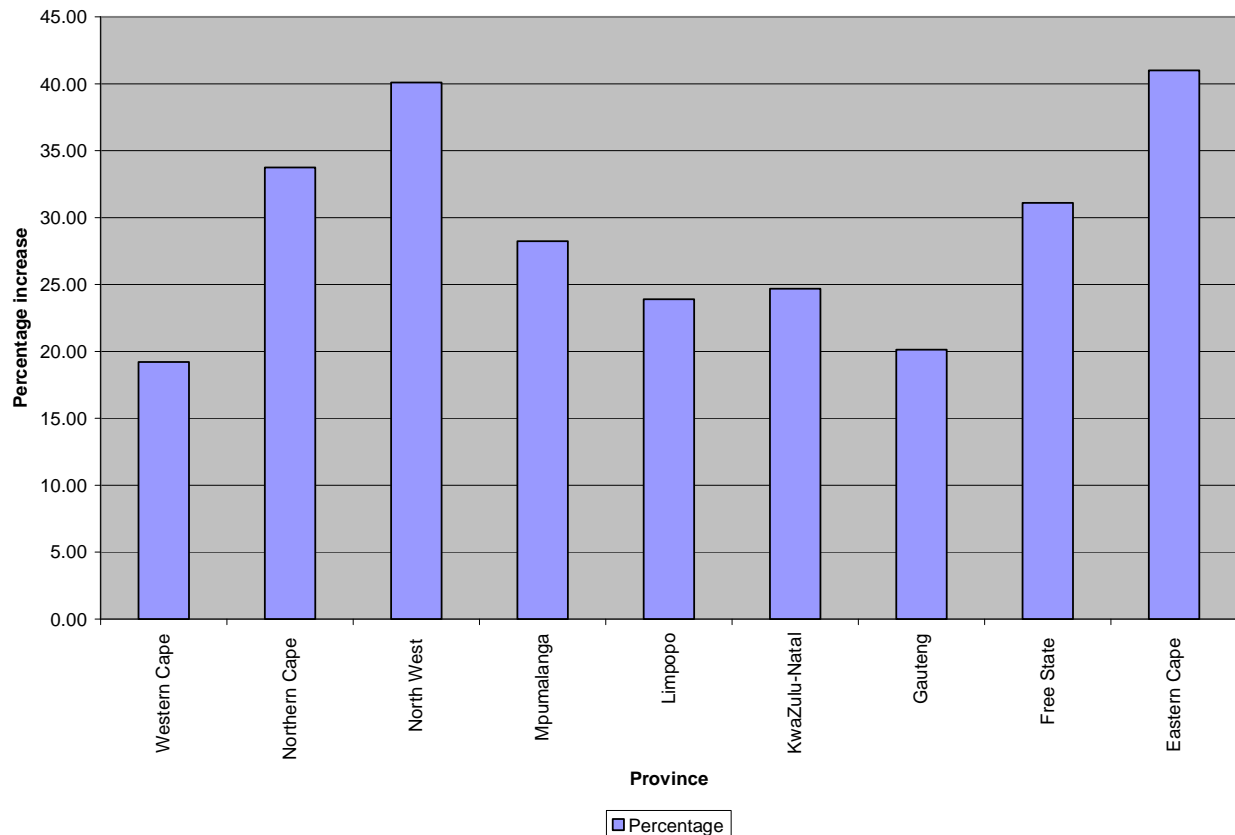
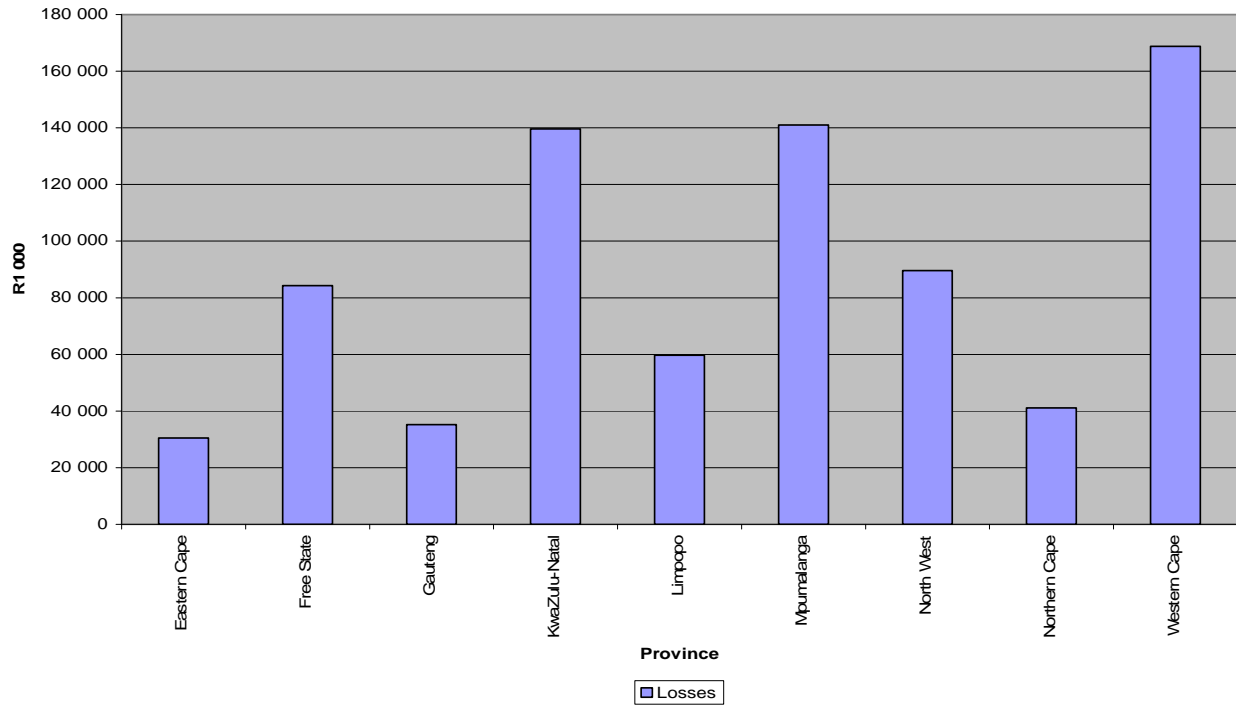


Figure 6 – Total value of losses encountered per province within agriculture



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Statistician-General

Table 1 – Principal statistics: Summary of the survey results covered by the Survey of Large Scale Agriculture 2005

| Item | Unit | 2005 |
|--|-------------|-------------------|
| Farming units with a VAT and/or IT turnover greater or equal to R2 million | Number | 7 687 |
| Employment | | 628 264 |
| Owners and family members | Number | 13 302 |
| Paid employees | | 322 025 |
| Casual/Seasonal employees | | 292 937 |
| Employees' remuneration (at current 2005 prices) (cash wages, salaries and cash bonuses) | R1 000 | 7 044 058 |
| Gross farming income (at current 2005 prices) | | 51 159 664 |
| Field crop products | R1 000 | 10 760 105 |
| Horticultural products | | 15 623 657 |
| Animals and animal products | | 24 245 307 |
| Other products excluding forestry | | 530 595 |
| Expenditure (at current 2005 prices) | | 40 129 047 |
| Current expenditure | R1 000 | 37 351 162 |
| Capital expenditure | | 2 777 885 |
| Market value of farming assets (at current 2005 prices) | R1 000 | 80 393 322 |
| Farming debt (at current 2005 prices) | R1 000 | 21 288 248 |

Table 2.1 – Principal statistics by province: Total employment and employee remuneration

| Province | Total employment (Owners and paid employees) | Total paid employees | Total paid employee remuneration |
|---------------------|--|----------------------|----------------------------------|
| | Number | Number | R1 000 |
| Eastern Cape | 29 384 | 28 442 | 314 628 |
| Free State | 72 606 | 70 426 | 651 637 |
| Gauteng | 34 687 | 34 075 | 607 026 |
| KwaZulu-Natal | 84 384 | 82 605 | 1 072 362 |
| Limpopo | 65 397 | 64 402 | 652 061 |
| Mpumalanga | 83 814 | 82 186 | 890 740 |
| North West | 48 788 | 47 399 | 605 022 |
| Northern Cape | 50 586 | 50 002 | 329 729 |
| Western Cape | 158 618 | 155 424 | 1 920 851 |
| South Africa | 628 264 | 614 962 | 7 044 058 |

Table 2.2 – Principal statistics by province: Employment and employee remuneration by employee status and ownership

| Province | Owners/proprietors | Full-time workers | | Casual and seasonal workers | |
|---------------------|--------------------|-------------------|------------------------|-----------------------------|------------------------|
| | Number | Number | Remuneration R1 000 | Number | Remuneration R1 000 |
| Eastern Cape | 941 | 15 178 | 249 984 | 13 265 | 64 644 |
| Free State | 2 180 | 35 280 | 553 224 | 35 146 | 98 413 |
| Gauteng | 611 | 21 935 | 542 182 | 12 140 | 64 844 |
| KwaZulu-Natal | 1 780 | 53 561 | 940 742 | 29 044 | 131 619 |
| Limpopo | 995 | 37 349 | 512 891 | 27 053 | 139 170 |
| Mpumalanga | 1 628 | 46 444 | 749 979 | 35 742 | 140 761 |
| North West | 1 388 | 26 405 | 521 858 | 20 995 | 83 165 |
| Northern Cape | 584 | 14 018 | 208 230 | 35 984 | 121 499 |
| Western Cape | 3 194 | 71 856 | 1 518 600 | 83 569 | 402 251 |
| South Africa | 13 302 | 322 025 | 5 797 691 | 292 937 | 1 246 367 |

Table 3 – Principal statistics by province: Gross farming income, expenditure, market value of assets and farming debt

| Province | Farming units | Gross farming income | Expenditure | | Market value of assets | Farming debt |
|---------------------|---------------|----------------------|-------------------|------------------|------------------------|-------------------|
| | Number | | Current | Capital | | |
| | | R1 000 | | | | |
| Eastern Cape | 536 | 2 531 191 | 1 692 137 | 194 998 | 4 459 498 | 799 913 |
| Free State | 1 331 | 7 433 449 | 5 139 568 | 278 380 | 10 301 667 | 4 698 321 |
| Gauteng | 430 | 4 466 717 | 2 814 887 | 235 571 | 3 958 239 | 1 733 183 |
| KwaZulu-Natal | 1 088 | 6 774 770 | 4 924 468 | 395 213 | 10 874 411 | 2 130 216 |
| Limpopo | 521 | 4 215 436 | 3 229 009 | 315 393 | 7 223 208 | 1 616 087 |
| Mpumalanga | 814 | 6 677 423 | 5 106 038 | 317 073 | 10 011 816 | 2 313 681 |
| North West | 716 | 5 566 068 | 4 014 308 | 236 004 | 6 125 799 | 1 648 911 |
| Northern Cape | 447 | 2 561 018 | 1 831 617 | 144 463 | 4 873 498 | 996 751 |
| Western Cape | 1 804 | 10 933 592 | 8 599 129 | 660 791 | 22 565 187 | 5 351 184 |
| South Africa | 7 687 | 51 159 664 | 37 351 162 | 2 777 885 | 80 393 322 | 21 288 248 |

Table 4 – Ratios (%)

| Province | Current expenditure/ Gross farming income | Salaries and wages/ Gross farming income | Farming debt/ Market value of assets | Farming debt/ Gross farming income |
|---------------------|--|---|---|---------------------------------------|
| Eastern Cape | 67 | 12 | 18 | 32 |
| Free State | 69 | 9 | 46 | 63 |
| Gauteng | 63 | 14 | 44 | 39 |
| KwaZulu-Natal | 73 | 16 | 20 | 31 |
| Limpopo | 77 | 15 | 22 | 38 |
| Mpumalanga | 76 | 13 | 23 | 35 |
| North West | 72 | 11 | 27 | 30 |
| Northern Cape | 72 | 13 | 20 | 39 |
| Western Cape | 79 | 18 | 24 | 49 |
| South Africa | 73 | 14 | 26 | 42 |

Table 5 – Breakdown of gross farming income per major division within agriculture

| Province | Field crops | Horticulture | Animals | Animal products | Other products |
|---------------------|-------------------|-------------------|-------------------|------------------|----------------|
| | R1 000 | | | | |
| Eastern Cape | 157 791 | 807 391 | 732 924 | 818 232 | 14 854 |
| Free State | 2 905 425 | 927 576 | 2 960 291 | 624 638 | 15 519 |
| Gauteng | 373 867 | 1 222 082 | 2 074 486 | 774 655 | 21 627 |
| KwaZulu-Natal | 1 831 954 | 783 252 | 2 903 526 | 1 085 889 | 170 148 |
| Limpopo | 468 771 | 2 424 851 | 1 058 133 | 222 650 | 41 031 |
| Mpumalanga | 2 087 253 | 1 927 910 | 2 120 676 | 476 691 | 64 893 |
| North West | 1 300 842 | 496 235 | 3 294 170 | 465 938 | 8 883 |
| Northern Cape | 783 257 | 1 069 721 | 615 257 | 88 459 | 4 324 |
| Western Cape | 850 945 | 5 964 639 | 2 374 241 | 1 554 451 | 189 316 |
| South Africa | 10 760 105 | 15 623 657 | 18 133 705 | 6 111 602 | 530 595 |

Table 6 – Total value of losses encountered during the financial year ended February 2005

| Province | Total value of losses |
|---------------------|-----------------------|
| | R1 000 |
| Eastern Cape | 30 458 |
| Free State | 84 262 |
| Gauteng | 35 198 |
| KwaZulu-Natal | 139 619 |
| Limpopo | 59 730 |
| Mpumalanga | 140 985 |
| North West | 89 575 |
| Northern Cape | 41 098 |
| Western Cape | 168 804 |
| South Africa | 789 730 |

Explanatory notes and definitions

1. General

In 2005 Statistics South Africa (Stats SA) undertook a survey of units active in the large scale agricultural sector within the Republic of South Africa. This survey covered the activities of large-scale commercial farms/entities in South Africa with an annual registered turnover of R2 million and above, and which were registered for Value Added Tax (VAT) and/or Income Tax (IT) for the collection period ending February 2005.

This statistical release is a summary of selected findings.

2. Scope of the survey of large scale agriculture 2005

The Survey of Large Scale Agriculture 2005 covers the following tax registered enterprises that are mainly engaged in farming activities such as:

- Growing of crops;
- Farming of animals; and/or
- Growing of crops combined with farming (mixed farming).

For purposes of the survey, farming means the following activities for commercial purposes:

- the growing of field crops, fruit, grapes, nuts, seeds, trees in a nursery, bulbs, vegetables and flowers in the open air or under cover
- operations at nurseries excluding those predominantly engaged in reselling
- the operation of tea, coffee and sugar plantations
- the raising of livestock, game, poultry, rabbits, freshwater fish, furbearing and other animals and
- the production of milk, wool, pelts/fur, eggs and honey.

Forestry e.g. timber, wattle, wood and other plantations, ocean fishing and agricultural services were not included in the survey.

Data in respect of agricultural smallholdings such as nurseries, vegetable gardens, flower farms and dairy farms are included in this release only in those cases where the products were intended for sale.

3. Survey year

Details relating to the area and market value of the farming unit, the number of owners, family members and employees involved in farming activities, and farming debt, were collected as at 28 February 2005. Data on land utilisation, employees' remuneration, gross farming income and expenditure, equipment purchased, and amount spent on buildings erected and development work undertaken refer to the financial year ending on any date between 1 March 2004 and 28 February 2005, while the market value of movable farming assets was as at the end of the financial year.

4. Comparability with the previous surveys

Caution is needed in comparing the results of this survey with results from previous surveys and censuses in the agricultural sector.

- The survey covers only large scale enterprises registered for VAT and/or IT with an annual registered turnover of R2 million and above;
- The updating of Stats SA's business register with data obtained from the South African Revenue Service (SARS) has resulted in a significantly improved frame as compared to the frames available for previous agricultural collections.

There were 7 687 large scale farming units that participated in the Survey of Large Scale Agriculture 2005, compared to 5 390 large scale farming units recorded in the Census of Commercial Agriculture 2002. The greater number of large scale farming units participating in the 2005 survey largely reflects improvements in the coverage of the sampling frame, and not growth in the large scale farming sector as such.

A valid basis for comparison is between enterprises included in both the 2002 Census of Commercial Agriculture and the 2005 Survey. The results for gross farming income by major division within agricultural are summarised in the key findings and shown in Figures 4 and 5.

5. Farming unit

The data are collected in respect of farming units. A farming unit consists of one or more farms, smallholdings or pieces of land, whether adjacent or not, operated as a single unit and situated within the same province.

A farming unit means any unit on which one or more of the following farming operations are carried out for commercial purposes:

- the cultivation in the open air or under cover of field crops, fruit, grapes, nuts, seed bulbs, vegetable plants or flowers
- the operation of a tea, coffee and sugar plantations
- the breeding of livestock, poultry, game or other animals, including freshwater fish, furred animals and trade in livestock
- the production of milk, wool, fur, eggs or honey.

Forestry e.g. timber, wattle, wood and other plantations, ocean fishing and agricultural services were not included in the Survey of Large Scale Agriculture 2005.

6. Farmer

The farmer is the person, partnership, company, close corporation or other enterprise that operates the farming unit for their own account; or the manager, foreman or other person to whom the control of the farming unit was entrusted.

7. Type of employment

'*Owners and family members*' refer to ownership by individuals or family and other forms of partnerships.

'*Permanent employees*' are employees who are employed on a permanent basis with benefits, such as leave.

'*Casual and seasonal employees*' include occasional and day labourers, e.g. shearers, reapers and fruit-pickers, but exclude contractors and their employees.

8. Gross farming income

Gross farming income as reported by the farmer includes income earned from agricultural products sold, divided in this release into field crops, horticultural products, animals and animal products, and all other products.

'*Animal and animal products*' include livestock, poultry, game and all other animals.

'*All other products*' include wild flowers, compost, firewood etc.

9. Current expenditure

Current expenditure is expenditure incurred by farming operations during the financial year in respect of the farming unit as reported by the farmer. These expenses include seed stock, poultry feeds, fertilisers, fuel, packing material, electricity purchased, interest paid and all other operating expenses. Railage and rented transport are also included with the relevant purchases.

10. Farming debt

Farming debt includes all obligations incurred in respect of normal farming activities, such as mortgages, loans and credits received from organisations such as banks, cooperative societies and private persons. Debt in respect of other business enterprises is not included.

Particulars regarding farming debt are based on the data submitted by respondents.

11. Abbreviations and symbols used

| | | |
|----------|---|----------------------------------|
| RSA | = | Republic of South Africa |
| Stats SA | = | Statistics South Africa |
| DTI | = | Department of Trade and Industry |
| SARS | = | South African Revenue Service |
| R | = | Rand |
| 0 | = | more than nil but less than 500 |
| VAT | = | Value Added TAX |
| IT | = | Income Tax |

12. Rounding-off of figures

The figures in the tables have 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.

13. Survey methodology and design

The survey was conducted by mail, email, fax, telephone and personal visits to individual farmers and/or accountants to assist respondents to complete the questionnaires.

14. Non-sampling errors

Inaccuracies may occur due to 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, editing reported data and implementing efficient operating procedures.

1. AGRICULTURAL CONCEPTS AND DEFINITIONS

The following table contains the concepts and definitions Statistics South Africa (Stats SA) uses within the agricultural sector.

| TERM | DEFINITION |
|--------------------------|---|
| Agricultural inputs | Consumable expendable inputs in agricultural production for both crops and livestock, for example fertilisers, seeds, veterinary drugs, etc. |
| Annual crops | Crops that are planted and harvested during the same production season. |
| Area harvested for grain | Area harvested for dry grain (whole grain, seed, beans or unshelled nuts) for commercial purposes, or to be retained for seed, animal feed or human consumption. It therefore excludes areas planted but not harvested owing to hail damage, fire, grazing, etc. and areas harvested but not used for grain, but for silage etc. |
| Area planted for grain | That part of the total area planted that is planted with the intention of harvesting it for grain rather than for silage, grazing or fodder. |
| Cash crop. | Crop grown for sale rather than for consumption on the farm. Synonym is <i>food crop</i> . |
| Cereals | Wheat, coarse grains and rice. |
| Commercial farm | A farm producing agricultural products intended for the market, usually registered for value-added tax (VAT) and income tax. |
| Commercial farmer | A person who produces agricultural products intended for the market. See <i>subsistence farmer</i> . |
| Farming unit | One or more farms, smallholdings or pieces of land, whether adjacent or not, operated as a single unit and situated within the same magisterial district or province, on which cultivation is carried out for both commercial and non-commercial purposes, in the open air or under cover. It includes land rented from others, the farmstead and other buildings, cropland, pasture, veld, wasteland and dams, but excludes land leased to others. A farming unit could be owned by a single person, partnership, company, or close corporation etc. |
| Food crop | See <i>cash crop</i> |
| Grain | Harvested produce of cereals, pulses, oil crops and legumes. |
| Grain production | Grain actually removed from the field. |
| Hectare | Metric unit of land measurement equivalent to 10000 square metres. |
| Inter-planted crop | A crop planted between rows of another crop. |
| Irrigation | Artificial application of water to land to assist in the growing of crops and pastures. |
| Livestock | All animals or birds kept or reared mainly for agricultural purposes including cattle, sheep, goats, pigs, horses, poultry, rabbits, etc. |
| Oilseeds | Dry seeds harvested from annual oil-bearing crops used for food, feed, seed or industrial purposes. |
| Yield | Amount of product harvested per unit area. |
| Yield per harvested area | Yield from the area actually harvested. |
| Yield per planted area | Yield from the area planted. |

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