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Food and beverages (Preliminary)

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Key findings as at the end of April 2009

Table A - Key estimates as at the end of April 2009

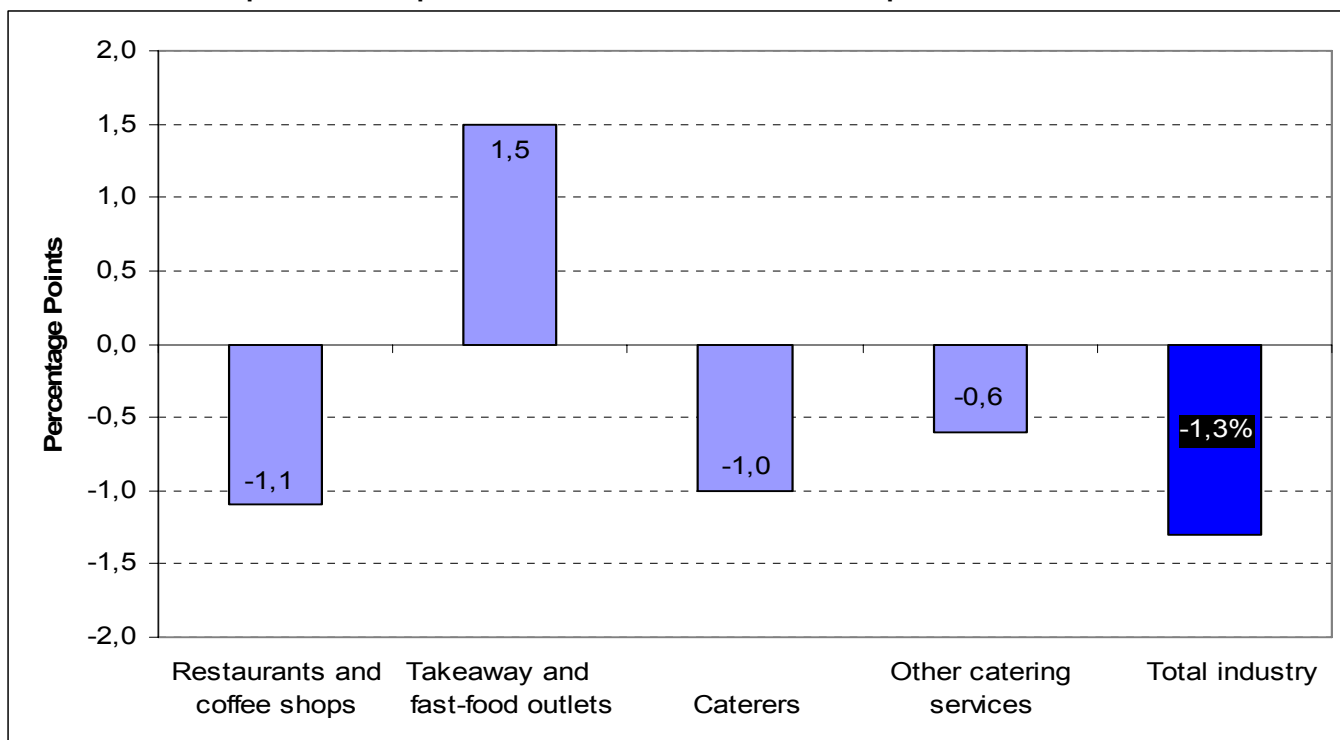
Estimates per type of income	April 2009 (R million)	% change between April 2008 and April 2009	% change between February to April 2008 and February to April 2009	% change between January to April 2008 and January to April 2009
Income from food sales	2 131,7	-2,7	0,8	3,2
Income from bar sales	205,7	-17,3	-16,7	-14,7
Other income	37,3	-29,6	-12,0	-12,0
Total income 1/	2 374,7	-4,7	-1,3	1,0

1/ Figures have been rounded off. Therefore, discrepancies may occur between sums of the component items and the totals.

Total income for food and beverages decreases

The total income generated by the food and beverages industry for the three months ended April 2009 decreased by 1,3% compared with the three months ended April 2008. This was due to decreases of 16,7% in income from bar sales and 12,0% in other income. However, there was an increase of 0,8% in income from food sales. Total income for April 2009 decreased by 4,7% compared with April 2008.

Figure 1 - Contribution to the percentage change in total income per enterprise type for the three months ended April 2009 compared with the three months ended April 2008



The 1,3% decrease in total income for the three months ended April 2009 compared with the three months ended April 2008 was mainly due to decreases reported by restaurant and coffee shops (-2,1% and contributing -1,1 percentage points) and caterers (-6,4% and contributing -1,0 percentage point). However, the decrease was counteracted by an increase in takeaway and fast-food outlets (5,6% and contributing 1,5 percentage points) (Figure 1 and Table B, page 4).

Table B - Contribution by type of enterprise to the percentage change in total income for the three months ended April 2009 compared with the three months ended April 2008

Enterprise type	February to April 2008 (R million)	Weight 1/	February to April 2009 (R million)	% change between February to April 2008 and February to April 2009	Contribution to the percentage change 2/
Restaurants and coffee shops	4 104,6	54,3	4 017,5	-2,1	-1,1
Takeaway and fast-food outlets	1 992,7	26,3	2 103,5	5,6	1,5
Caterers	1 167,7	15,4	1 093,4	-6,4	-1,0
Other catering services	297,6	3,9	251,9	-15,4	-0,6
Total industry 3/	7 562,5	100,0	7 466,3	-1,3	-1,3

1/ Weight is the percentage contribution of each type of enterprise to the total enterprise income for the three months up to the current month of the previous year.
 2/ The contribution to the percentage change is calculated by multiplying the percentage change of each type of enterprise with the corresponding weight, divided by 100.
 3/ Figures have been rounded off. Therefore, discrepancies may occur between sums of the component items and the totals.

Table C - Contribution by type of enterprise to the percentage change in total income for April 2009 compared with April 2008

Enterprise type	April 2008 (R million)	Weight 1/	April 2009 (R million)	% change between April 2008 and April 2009	Contribution to the percentage change 2/
Restaurants and coffee shops	1 363,4	54,7	1 243,6	-8,8	-4,8
Takeaway and fast-food outlets	624,2	25,0	719,8	15,3	3,8
Caterers	414,7	16,6	330,2	-20,4	-3,4
Other catering services	90,4	3,6	81,1	-10,3	-0,4
Total industry 3/	2 492,7	100,0	2 374,7	-4,7	-4,7

1/ Weight is the percentage contribution of each type of enterprise to the total enterprise income for the three months up to the current month of the previous year.
 2/ The contribution to the percentage change is calculated by multiplying the percentage change of each type of enterprise with the corresponding weight, divided by 100.
 3/ Figures have been rounded off. Therefore, discrepancies may occur between sums of the component items and the totals.

The main contributors to the decrease of 4,7% in total income for April 2009 compared with April 2008 were restaurant and coffee shops (-8,8% and contributing -4,8 percentage points) and caterers (-20,4% and contributing -3,4 percentage points). However, the decrease was counteracted by an increase in takeaway and fast-food outlets (15,3% and contributing 3,8 percentage points).

P J Lehohla
Statistician-General

Detailed statistics

Table 1: Food and beverages statistics from April 2008 to April 2009 (R million)

Enterprise type		Apr 2008	May 2008	Jun 2008	Jul 2008	Aug 2008	Sep 2008	Oct 2008	Nov 2008	Dec 2008	Jan 2009	Feb 2009	Mar 2009	Apr 2009 ^{1/}
Restaurants and coffee shops	Income from food sales	1 190,6	1 146,6	1 166,4	1 166,7	1 199,2	1 296,5	1 276,9	1 415,5	1 584,8	1 212,3	1 127,9	1 318,5	1 099,2
	Income from bar sales	168,2	158,2	149,5	157,2	157,7	144,9	164,9	227,1	206,1	157,7	148,9	156,2	136,4
	Other income	4,6	7,7	7,4	9,1	8,2	9,9	10,5	10,0	11,6	8,8	10,7	11,7	8,0
	Total income	1 363,4	1 312,5	1 323,3	1 333,0	1 365,1	1 451,3	1 452,3	1 652,6	1 802,5	1 378,8	1 287,5	1 486,4	1 243,6
Takeaway and fast-food outlets	Income from food sales	592,3	646,8	618,6	616,4	670,6	647,3	655,5	691,0	921,2	706,0	650,1	683,5	697,4
	Income from bar sales	10,6	10,2	9,8	9,7	10,1	10,4	11,4	11,4	13,8	9,4	11,1	9,8	7,9
	Other income	21,3	11,1	13,1	13,5	16,8	7,8	13,4	24,5	10,4	13,7	12,0	17,2	14,5
	Total income	624,2	668,1	641,5	639,6	697,5	665,5	680,3	726,9	945,4	729,1	673,2	710,5	719,8
Caterers	Income from food sales	379,3	385,2	407,3	431,5	445,7	440,0	469,4	467,2	376,1	297,1	376,4	335,6	311,6
	Income from bar sales	8,3	14,6	14,3	8,7	8,7	7,5	9,0	11,2	8,3	4,8	4,3	5,9	3,8
	Other income	27,1	48,0	30,1	19,7	19,7	27,8	22,3	34,4	32,4	17,5	19,3	21,7	14,8
	Total income	414,7	447,8	451,7	459,9	474,1	475,3	500,7	512,8	416,8	319,4	400,0	363,2	330,2
Other catering services	Income from food sales	28,9	30,7	32,8	30,3	33,2	29,5	30,1	32,2	37,3	26,7	29,1	24,9	23,5
	Income from bar sales ^{2/}	61,5	60,3	64,9	66,4	65,8	67,3	70,0	62,7	74,3	58,4	58,0	58,8	57,6
	Total income	90,4	91,0	97,7	96,7	99,0	96,8	100,1	94,9	111,6	85,1	87,1	83,7	81,1
Total	Income from food sales	2 191,1	2 209,3	2 225,1	2 244,9	2 348,7	2 413,3	2 431,9	2 605,9	2 919,4	2 242,1	2 183,5	2 362,5	2 131,7
	Income from bar sales	248,6	243,3	238,5	242,0	242,3	230,1	255,3	312,4	302,5	230,3	222,3	230,7	205,7
	Other income	53,0	66,8	50,6	42,3	44,7	45,5	46,2	68,9	54,4	40,0	42,0	50,6	37,3
	Total income	2 492,7	2 519,4	2 514,2	2 529,2	2 635,7	2 688,9	2 733,4	2 987,2	3 276,3	2 512,4	2 447,8	2 643,8	2 374,7

1/Preliminary.

2/Other income for other catering services is too small to provide any meaningful comparison and has thus been added to income from bar sales.

Table 2: Percentage change in food and beverages statistics from April 2008 to April 2009 ^{1/}

Enterprise type		Apr 2008	May 2008	Jun 2008	Jul 2008	Aug 2008	Sep 2008	Oct 2008	Nov 2008	Dec 2008	Jan 2009	Feb 2009	Mar 2009	Apr 2009
Restaurants and coffee shops	Income from food sales	19,2	19,7	22,5	19,9	21,5	27,5	19,5	16,0	11,4	6,1	0,1	5,4	-7,7
	Income from bar sales	-1,9	14,2	0,0	11,1	2,0	-1,7	10,6	33,5	0,1	-5,5	-14,5	-13,9	-18,9
	Other income	15,1	95,4	82,5	127,6	132,0	119,1	241,9	213,8	212,8	92,3	276,9	155,6	73,9
	Total income	16,1	19,3	19,7	19,2	19,2	24,2	19,0	18,5	10,5	4,9	-1,2	3,4	-8,8
Takeaway and fast-food outlets	Income from food sales	13,2	26,2	15,5	13,5	23,3	14,2	14,3	16,6	26,6	29,0	16,0	-8,8	17,7
	Income from bar sales	6,7	7,3	-2,3	-4,1	-8,1	2,8	22,2	18,9	34,1	2,7	6,1	-10,8	-25,5
	Other income	83,2	-12,1	3,8	-1,7	30,1	-35,2	-13,2	54,6	-38,3	-11,3	-32,5	-9,6	-31,9
	Total income	14,6	24,9	15,0	12,8	22,8	13,0	13,7	17,6	25,2	27,5	14,3	-8,9	15,3
Caterers	Income from food sales	13,2	5,7	12,8	21,5	14,8	14,2	36,3	20,5	14,1	1,1	12,4	1,2	-17,8
	Income from bar sales	-66,7	-44,1	-46,3	-61,1	-63,9	-71,6	-61,2	-57,9	-70,8	-70,4	-74,1	-69,8	-54,2
	Other income	31,1	117,3	26,6	2,9	2,4	27,4	-14,8	15,6	3,9	-31,1	-10,8	-24,3	-45,4
	Total income	8,9	8,5	9,8	16,0	9,9	9,7	27,1	15,5	7,1	-4,8	7,2	-4,4	-20,4
Other catering services	Income from food sales	23,8	36,8	39,4	-0,4	10,0	-10,3	0,3	8,0	18,0	-23,5	-22,6	-38,7	-18,7
	Income from bar sales	4,0	-2,0	10,2	6,9	-3,5	-7,6	-11,0	-24,7	-34,6	-1,5	-7,0	-11,7	-6,3
	Total income	9,6	8,4	18,5	4,5	0,6	-8,4	-7,8	-16,1	-23,1	-9,6	-12,9	-21,9	-10,3
Total	Income from food sales	16,6	19,0	18,8	18,0	20,5	20,5	20,6	16,8	16,3	11,0	6,0	-0,5	-2,7
	Income from bar sales	-6,4	3,2	-2,7	2,5	-6,1	-10,4	-1,9	7,9	-15,6	-8,5	-15,6	-17,2	-17,3
	Other income	46,1	72,8	25,1	14,7	25,2	18,6	3,4	41,2	5,2	-11,9	-0,6	-3,2	-29,6
	Total income	14,3	18,2	16,5	16,3	17,5	17,1	17,8	16,3	12,2	8,5	3,5	-2,2	-4,7

^{1/}The percentage change is the change in food and beverages statistics of the relevant month compared with the food and beverages statistics of the same month in the previous year expressed as a percentage.

Explanatory notes

Introduction The results presented in this publication are derived from the monthly survey of the food and beverages industry. This survey is based on a sample drawn from the 2008 Business Sampling Frame (BSF) that contains businesses registered for value-added tax (VAT).

Purpose of the survey The food and beverages survey is a monthly survey covering a sample of public and private enterprises involved in the preparation of meals and drinks for immediate consumption in South Africa. The purpose of this survey is to monitor trends in the food and beverages industry.

The results of the survey are used to compile estimates of the Tourism Satellite Accounts (TSA) and the Gross Domestic Product (GDP) and its components, which are used to develop and monitor government policy. These statistics are also used in the analysis of comparative business and industry performance. The results of this monthly survey are published monthly in the statistical release P6420: *Food and beverages*.

Scope of the survey This survey covers the following **tax registered** private and public enterprises that are **mainly** engaged in providing food and beverages for immediate consumption:

- Restaurants and coffee shops,
- Takeaway and fast-food outlets,
- Caterers, and
- Other catering services.

Response rate The preliminary response rate for the 'Food and beverages' survey for April 2009 was 92,1%. The improved response rate for March 2009 was 94,4%.

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. Statistics in this publication are presented at 5-digit SIC level. Each enterprise is classified to an industry, which reflects its predominant activity.

Size groups The enterprises are divided into four size groups according to turnover. Large enterprises are enterprises with an annual turnover of R13 million and more. The Department of Trade and Industry (DTI) cut-off points defining the size groups, namely large, medium, small and micro enterprises, are given in table D.

Table D – Size groups for the food and beverages industry

Size group	Annual Turnover
Large	Turnover ≥ R13 000 000
Medium	R6 000 000 ≤ Turnover < R13 000 000
Small	R5 100 000 ≤ Turnover < R6 000 000
Micro	Turnover < R5 100 000

Statistical unit The statistical units for the collection of the information are enterprises and establishments.

Survey methodology and design The survey was conducted by mail, fax and telephone.
A sample of approximately 900 enterprises was drawn using stratified simple random sampling. The enterprises were first stratified at 5-digit level according to the SIC and then by size of enterprises. Large enterprises are completely enumerated. Turnover was used as the measure of size.

Weighting methodology

For those strata not completely enumerated, the weights to produce estimates are the inverse ratio of the sampling fraction, modified to take account of non-response in the survey. Stratum estimates are calculated and then aggregated with the completely enumerated stratum to form division estimates. These procedures, which are in line with international best practice, are described in more detail on the Stats SA website at: <http://www.statssa.gov.za/publications/publicationsearch.asp>.

Relative standard error

Data presented in this publication are based on information obtained from a sample and are, therefore, subject to sampling variability; that is, they may differ from the figures that would have been produced if the data had been obtained from all enterprises in the food and beverages industry in South Africa.

One measure of the likely difference is given by the standard error (SE), which indicates the extent to which an estimate might have varied by chance because only a sample of enterprises was used. The relative standard error (RSE) provides an immediate indication of the percentage errors likely to have occurred due to sampling, and thus avoids the need to refer to the size of the estimate.

Table E – Estimate of total industry income within 95% confidence limits – April 2009

Estimate	Lower limit (R million)	Income (R million)	Upper limit (R million)	Relative standard error (RSE) %
Total income	2 063,6	2 374,7	2 686,2	6,7

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.

Revised figures

Revised figures are due to respondents reporting revisions or corrections to their figures and late submission of their data to Stats SA. Preliminary figures are indicated in the relevant tables. Data are edited at the enterprise level.

Seasonal adjustment

Seasonally adjusted estimates will not be published until there are sufficient data points for the new survey. As soon as sufficient data points are available, Stats SA will consider publishing seasonally adjusted estimates.

Symbols and abbreviations

- GDP Gross Domestic Product
- SARS South African Revenue Service
- SIC Standard Industrial Classification of all Economic Activities
- Stats SA Statistics South Africa
- VAT Value-added tax
- * Revised figures

Rounding of figures

Where figures have been rounded off, discrepancies may occur between sums of the component items and the totals.

Glossary

Caterers	Enterprises involved in the sale and supply of meals and drinks prepared on the premises on a contract basis and brought to other premises chosen by the person ordering it, to be served for immediate consumption to guests or customers.
Enterprise	A legal unit or a combination of legal units that includes and directly controls all functions necessary to carry out its activities.
Income from bar sales	Refers to income from liquor sales.
Income from food sales	Refers to income from the sale of meals and non-alcoholic drinks.
Industry	It is 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, Fifth Edition; Report No. 09-09-02 of April 1993 (SIC)</i> .
Other catering services	Includes bars, taverns, other drinking places, ice-cream parlours, etc.
Other income	Includes all income not earned from food sales or bar sales.
Restaurants and coffee shops	Enterprises involved in the sale and provision of meals and drinks, ordered from a menu, prepared on the premises for immediate consumption and with provided seating.
Total income	Includes income from food sales, income from bar sales and other income.
Takeaway and fast-food outlets	Enterprises involved in the sale and provision of meals and drinks, ordered from a menu, prepared on the premises for takeaway purposes in a packaged format (not on plates), at a stand or in a location, with or without provided seating.

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