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## 1. Introduction

This publication presents estimates in respect of the 2020 ocean (marine) fisheries and related services industry survey. The survey aims to provide financial, production, employment and related information for the ocean (marine) fisheries and related services industry.

The last ocean (marine) fisheries and related services industry survey was conducted in 2019 (Report No. 13-00-00 (2019)).

### 1.1 Scope and coverage

The 2020 ocean (marine) fisheries and related services industry survey covers enterprises mainly engaged in the ocean (marine) fisheries 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:

- Ocean and coastal fishing (SIC 131).

*Excluding*

- Fish hatcheries and fish farms (SIC 132).

### 1.2 Data items

The following categories of data items were collected: industrial classification, employment, trading income, expenditure, profit or loss, inventories, capital expenditure on new assets, sales of goods, purchases, 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 **ending 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.

***For example (2020):***

- 1 October 2018 – 30 September 2019
- 1 January 2019 – 31 December 2019
- 1 February 2019 – 31 January 2020
- 1 March 2019 – 29 February 2020
- 1 July 2019 – 30 June 2020

The data for the number of employees were provided for working proprietors and employees who received salaries and wages for the last pay period ended on or before 30 June 2020.

### 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 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.

### **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 enterprise is classified to an industry that reflects its predominant activity.

## 2. Summary of findings

**Table A – Selected financial statistics in the ocean (marine) fisheries and related services industry, 2017–2020**

Year	Total income	Net profit before tax	Capital expenditure on new assets
	R'000		
2017	15 009 140	2 080 672	392 361
2019	17 544 256	2 542 056	866 290
2020	15 954 036	1 669 259	607 171
Annualised % change (2017 to 2019)	8,1	10,5	48,6
% change (2019 to 2020)	-9,1	-34,3	-29,9

The total income in the ocean (marine) fisheries and related services industry in 2020 was R16,0 billion. The figure represents a decrease of 9,1% over the total income reported in 2019 (R17,5 billion).

There was a decrease of 34,3% in net profit before tax from R2,5 billion in 2019 to R1,7 billion in 2020. Capital expenditure decreased by 29,9% from R0,9 billion in 2019 to R0,6 billion in 2020.

**Table B – Concentration ratios for total income in the ocean (marine) fisheries and related services industry, 2017–2020**

Concentration ratio	2017	2019	2020
	%		
CR5	67,1	61,2	67,0
CR10	78,3	73,0	75,8
CR20	85,6	81,9	83,6
CR50	91,5	90,4	91,8
CR100	95,1	95,0	95,8

In 2020, the top 10 enterprises in the ocean (marine) fisheries and related services industry contributed 75,8% to the total income. The concentration ratios of the top 50 and 100 enterprises in the three periods were the highest in 2020 at 91,8% and 95,8%, respectively, while the concentration ratios of the top 5, 10 and 20 enterprises in the three periods were the highest in 2017 at 67,1%, 78,3% and 85,6%, respectively. The concentration ratios of the top 5, 10, 20, 50 and 100 enterprises were all lowest in 2019.



**Table C – Profit margin in the ocean (marine) fisheries and related services industry, 2017–2020**

		2017	2019	2020
Net profit after tax	R'000	1 227 422	1 970 285	1 235 616
Turnover	R'000	10 904 978	16 359 402	14 990 416
Profit margin	%	11,3	12,0	8,2

In 2020 the profit margin for the ocean (marine) fisheries and related services industry was 8,2%, which was the lowest margin recorded in the three surveys shown in Table C.

**Table D – Employment for the last pay period ended on or before 30 June in the ocean (marine) fisheries and related services industry, 2017–2020**

Item	2017		2019		2020	
	Number	% contribution	Number	% contribution	Number	% contribution
Permanent and working proprietors (paid and non-paid)	13 230	79,3	11 171	70,7	10 705	71,3
Temporary and casual/seasonal	3 457	20,7	4 640	29,3	4 308	28,7
<b>Total</b>	<b>16 687</b>	<b>100,0</b>	<b>15 811</b>	<b>100,0</b>	<b>15 013</b>	<b>100,0</b>

The number of persons employed in the ocean (marine) fisheries and related services industry in 2020 was 15 013. This represents a decrease of 798 (or -5,0%) compared with 2019. The largest type of employment was 'permanent and working proprietors (paid and non-paid)' with 10 705 employees (or 71,3%).

**Table E – Average salaries and wages in the ocean (marine) fisheries and related services industry, 2017–2020**

Year	Salaries and wages	Total employees	Average salaries and wages
	R'000	Number	Rands
2017	2 460 063	16 687	147 424
2019	2 847 613	15 811	180 103
2020	2 862 924	15 013	190 696

The average salaries and wages in the ocean (marine) fisheries and related services industry in 2020 was R190 696, which was 5,9% higher than the average in 2019.

**Table F – Sales and transfers-out of own-caught fish and other fish products in the ocean (marine) fisheries and related services industry, 2017–2020**

Item	2017		2019		2020	
	R'000	% contribution	R'000	% contribution	R'000	% contribution
Hake	1 786 246	37,5	1 891 374	28,8	1 826 156	31,5
Squid	922 468	19,4	1 444 651	22,1	1 086 627	18,8
Pilchard/Sardine	235 883	5,0	230 373	3,5	115 300	2,0
Anchovy	420 617	8,9	607 473	9,3	418 020	7,2
Lobster, South coast rock	245 098	5,2	298 204	4,6	224 287	3,9
Lobster, West coast rock	330 234	7,0	348 444	5,3	244 512	4,2
Tuna, Albacore	78 264	1,6	75 619	1,2	133 882	2,3
Kingklip	68 095	1,4	69 800	1,1	97 978	1,7
Mackerel (Maasbanker/Cape horse mackerel, King mackerel)	131 737	2,8	528 363	8,1	460 226	8,0
Other own-caught fish and other fish products	530 777	11,2	1 049 957	16,0	1 178 820	20,4
<b>Total sales and transfers-out of fish and fish products</b>	<b>4 749 419</b>	<b>100,0</b>	<b>6 544 258</b>	<b>100,0</b>	<b>5 785 808</b>	<b>100,0</b>

The total sales and transfers-out of own-caught fish and other fish products decreased by 11,6% from R6,5 billion in 2019 to R5,8 billion in 2020. Comparing 2019 and 2020, the largest decreases were reported for 'squid' (-R358 million), 'anchovy' (-R189 million) and 'pilchard/sardine' (R115 million).

'Hake' sales remained the largest contributor to the total sales and transfers-out of own-caught fish and other fish products (37,5% in 2017, 28,8% in 2019 and 31,5% in 2020), followed by 'squid' (19,4% in 2017, 22,1% in 2019 and 18,8% in 2020).

**Table G – Sales and transfers-out of processed fish in the ocean (marine) fisheries and related services industry, 2017–2020**

Item	2017		2019		2020	
	R'000	% contribution	R'000	% contribution	R'000	% contribution
Hake, whole or cuts (e.g. steaks), frozen	2 096 123	24,2	1 750 724	19,4	1 722 628	20,2
Other white fish, whole or cuts, frozen	305 232	3,5	356 375	4,0	343 492	4,0
Fish (including fillets), smoked	1 089	0,0	11 738	0,1	10 567	0,1
Fish, canned	4 032 899	46,5	3 891 527	43,2	4 064 194	47,7
Fish cakes	176 848	2,0	177 549	2,0	152 359	1,8
Fish fingers	248 955	2,9	307 607	3,4	298 030	3,5
Other processed fish	1 811 741	20,9	2 519 644	27,9	1 931 222	22,7
<b>Total sales and transfers-out of processed fish</b>	<b>8 672 887</b>	<b>100,0</b>	<b>9 015 164</b>	<b>100,0</b>	<b>8 522 492</b>	<b>100,0</b>

The total sales and transfers-out of processed fish in the ocean (marine) fisheries and related services industry in 2020 was R8,5 billion, which is a decrease of 5,5% (or -R0,5 billion) from R9,0 billion in 2019. Comparing 2019 and 2020, the largest decrease was reported for 'other processed fish' (-R0,6 billion). 'Fish, canned' remained the largest contributor to the total sales and transfers-out of processed fish (46,5% in 2017, 43,2% in 2019 and 47,7% in 2020).

**Risenga Maluleke**  
**Statistician-General**

## 3. Tables

**Table 1 – Principal statistics in the ocean (marine) fisheries and related services industry, 2019 and 2020**

Year	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'000								Number
2019 <sup>1</sup>	17 544 256	15 422 234	1 483 506	1 903 539	2 542 056	4 026 336	4 227 482	866 290	15 811
2020 <sup>2</sup>	15 954 036	14 686 975	1 785 751	2 188 205	1 669 259	4 271 284	4 412 684	607 171	15 013
% change	-9,1	-4,8	20,4	15,0	-34,3	6,1	4,4	-29,9	-5,0

<sup>1</sup> Revised figures.<sup>2</sup> Preliminary figures.**Table 2 – Details of income in the ocean (marine) fisheries and related services industry, 2019 and 2020**

Item	2019 <sup>1</sup>		2020 <sup>2</sup>		% change
	R'000	% contribution	R'000	% contribution	
Sales of goods	15 961 705	91,0	14 558 212	91,4	-8,8
Services rendered	380 315	2,2	417 608	2,6	9,8
Interest received	184 162	1,0	180 010	1,1	-2,3
Dividends received	213 281	1,2	213 637	1,3	0,2
Profit on foreign exchange and financial and other assets	552 897	3,2	199 204	1,2	-64,0
Other income	251 896	1,4	385 365	2,4	53,0
<b>Total income</b>	<b>17 544 256</b>	<b>100,0</b>	<b>15 954 036</b>	<b>100,0</b>	<b>-9,1</b>

<sup>1</sup> Revised figures.<sup>2</sup> Preliminary figures.

**Table 3 – Details of expenditure in the ocean (marine) fisheries and related services industry, 2019 and 2020**

Item	2019 <sup>1</sup>		2020 <sup>2</sup>		% change
	R'000	% contribution	R'000	% contribution	
Purchases	7 575 480	49,1	7 493 296	50,9	-1,1
Salaries, wages and bonuses	2 847 613	18,5	2 862 924	19,5	0,5
Payment to subcontractors	227 199	1,5	201 585	1,4	-11,3
Advertising and marketing expenses	150 200	1,0	127 909	0,9	-14,8
Depreciation and amortisation provided for during the financial year	410 483	2,7	482 160	3,3	17,5
Interest paid	418 524	2,7	444 063	3,0	6,1
Losses on foreign exchange and financial and other assets	222 530	1,4	117 719	0,8	-47,1
Management and administrative fees	386 578	2,5	408 650	2,8	5,7
Repair and maintenance	569 092	3,7	583 858	4,0	2,6
Railage and transport-out	281 728	1,8	100 523	0,7	-64,3
Total other expenditure	2 332 807	15,1	1 864 288	12,7	-20,1
<b>Total expenditure</b>	<b>15 422 234</b>	<b>100,0</b>	<b>14 686 975</b>	<b>100,0</b>	<b>-4,8</b>

<sup>1</sup> Revised figures.<sup>2</sup> Preliminary figures.

**Table 4 – Details of assets, owners' equity and liabilities in the ocean (marine) fisheries and related services industry, 2019 and 2020**

Item	2019 <sup>1</sup>		2020 <sup>2</sup>		% change
	R'000	% contribution	R'000	% contribution	
<b>Total non-current assets</b>	<b>7 177 183</b>	<b>40,9</b>	<b>7 402 739</b>	<b>46,8</b>	<b>3,1</b>
Property, plant and equipment and intangible assets, excluding goodwill	3 652 938	20,8	3 849 686	24,4	5,4
Goodwill	574 544	3,3	562 998	3,6	-2,0
Long-term investments	1 855 462	10,6	1 529 265	9,7	-17,6
Other non-current assets	1 094 240	6,2	1 460 789	9,2	33,5
<b>Total current assets</b>	<b>10 376 259</b>	<b>59,1</b>	<b>8 398 386</b>	<b>53,2</b>	<b>-19,1</b>
Trade and other receivables	2 915 699	16,6	2 345 770	14,8	-19,5
Cash and bank	1 595 508	9,1	830 410	5,3	-48,0
Inventory	1 903 550	10,8	2 188 205	13,8	15,0
Other current assets	3 961 502	22,6	3 034 000	19,2	-23,4
<b>Total assets</b>	<b>17 553 442</b>	<b>100,0</b>	<b>15 801 124</b>	<b>100,0</b>	<b>-10,0</b>
<b>Equity, including minority interest</b>	<b>6 280 157</b>	<b>35,8</b>	<b>5 909 995</b>	<b>37,4</b>	<b>-5,9</b>
<b>Total non-current liabilities</b>	<b>6 532 538</b>	<b>37,2</b>	<b>5 282 992</b>	<b>33,4</b>	<b>-19,1</b>
Long-term liabilities	4 416 974	25,2	3 363 904	21,3	-23,8
Other non-current liabilities	2 115 564	12,1	1 919 087	12,1	-9,3
<b>Total current liabilities</b>	<b>4 740 746</b>	<b>27,0</b>	<b>4 608 138</b>	<b>29,2</b>	<b>-2,8</b>
Trade and other payables	2 625 796	15,0	2 589 724	16,4	-1,4
Bank overdraft	23 105	0,1	64 803	0,4	180,5
Other current liabilities	2 091 845	11,9	1 953 610	12,4	-6,6
<b>Total equity and liabilities</b>	<b>17 553 442</b>	<b>100,0</b>	<b>15 801 124</b>	<b>100,0</b>	<b>-10,0</b>

<sup>1</sup> Revised figures.<sup>2</sup> Preliminary figures.

**Table 5 – Capital expenditure on new assets in the ocean (marine) fisheries and related services industry, 2019 and 2020**

Item	2019 <sup>1</sup>		2020 <sup>2</sup>		% change
	R'000	% contribution	R'000	% contribution	
Land, buildings and construction works	40 606	4,7	60 931	10,0	50,1
Computers and IT equipment	2 993	0,3	3 607	0,6	20,5
Motor vehicles and other transport equipment	482 990	55,8	324 799	53,6	-32,8
Plant, machinery, fishing tackle, furniture and other office equipment	259 394	29,9	156 249	25,7	-39,8
Intangible non-produced assets (e.g. goodwill, patent rights, quota rights)	77 549	9,0	58 944	9,7	-24,0
Other assets	2 758	0,3	2 641	0,4	-4,2
<b>Total capital expenditure</b>	<b>866 290</b>	<b>100,0</b>	<b>607 171</b>	<b>100,0</b>	<b>-29,9</b>

<sup>1</sup> Revised figures.

<sup>2</sup> Preliminary figures.



**Table 6 – Carrying value of assets at the end of the financial year in the ocean (marine) fisheries and related services industry, 2019 and 2020**

Item	2019 <sup>1</sup>		2020 <sup>2</sup>		% change
	R'000	% contribution	R'000	% contribution	
Land, buildings and construction works	193 519	4,6	227 801	5,2	17,7
Computers and IT equipment	17 479	0,4	14 745	0,3	-15,6
Fishing vessels, motor vehicles and other transport equipment	2 475 698	58,5	2 561 350	58,1	3,5
Plant, machinery, fishing tackle, furniture and other office equipment	685 055	16,2	650 850	14,7	-5,0
Intangible non-produced assets (e.g. goodwill, patent rights, quota rights)	805 650	19,1	884 424	20,0	9,8
Other assets	50 081	1,2	73 514	1,7	46,8
<b>Total</b>	<b>4 227 482</b>	<b>100,0</b>	<b>4 412 684</b>	<b>100,0</b>	<b>4,4</b>

<sup>1</sup> Revised figures.<sup>2</sup> Preliminary figures.**Table 7 – Details of employees for the last pay period ended on or before 30 June in the ocean (marine) fisheries and related services industry, 2019 and 2020**

Type of employment	Female			Male			Total		
	2019 <sup>1</sup>	2020 <sup>2</sup>	% change	2019 <sup>1</sup>	2020 <sup>2</sup>	% change	2019 <sup>1</sup>	2020 <sup>2</sup>	% change
	Number			Number			Number		
Permanent and working proprietors (paid and non-paid)	2 943	2 901	-1,4	8 228	7 804	-5,2	11 171	10 705	-4,2
Temporary and casual/seasonal	1 689	1 547	-8,4	2 951	2 761	-6,4	4 640	4 308	-7,2
<b>Total</b>	<b>4 632</b>	<b>4 448</b>	<b>-4,0</b>	<b>11 179</b>	<b>10 565</b>	<b>-5,5</b>	<b>15 811</b>	<b>15 013</b>	<b>-5,0</b>

<sup>1</sup> Revised figures.<sup>2</sup> Preliminary figures.

**Table 8 – Details of sales and transfers-out of own-caught fish, processed fish and other sales in the ocean (marine) fisheries and related services industry, 2019 and 2020**

Item	Metric tons		% change	R'000		% change
	2019 <sup>1</sup>	2020 <sup>2</sup>		2019 <sup>1</sup>	2020 <sup>2</sup>	
Hake	63 704	55 580	-12,8	1 891 374	1 826 156	-3,4
Squid	17 206	11 978	-30,4	1 444 651	1 086 627	-24,8
Pilchard/Sardine	17 204	16 385	-4,8	230 373	115 300	-50,0
Anchovy	229 769	146 865	-36,1	607 473	418 020	-31,2
Lobster, South coast rock	375	280	-25,4	298 204	224 287	-24,8
Lobster, West coast rock	649	406	-37,5	348 444	244 512	-29,8
Tuna, Albacore	2 455	3 510	42,9	75 619	133 882	77,0
Kingklip	1 373	1 428	4,0	69 800	97 978	40,4
Mackerel (Maasbanker/Cape horse mackerel, King mackerel)	39 684	26 961	-32,1	528 363	460 226	-12,9
Other	23 974	43 652	82,1	1 049 957	1 178 820	12,3
<b>Total sales and transfers-out of fish and fish products</b>				<b>6 544 258</b>	<b>5 785 808</b>	<b>-11,6</b>
Hake, whole or cuts (e.g. steaks), frozen	28 119	27 322	-2,8	1 750 724	1 722 628	-1,6
Other white fish, whole or cuts, frozen	7 165	6 667	-7,0	356 375	343 492	-3,6
Fish (including fillets), smoked	135	123	-8,4	11 738	10 567	-10,0
Fish, canned	116 973	114 360	-2,2	3 891 527	4 064 194	4,4
Fish cakes	3 933	3 212	-18,3	177 549	152 359	-14,2
Fish fingers	6 104	5 640	-7,6	307 607	298 030	-3,1
Other processed fish	92 602	61 262	-33,8	2 519 644	1 931 222	-23,4
<b>Total sales and transfers-out of processed fish and other marine products</b>				<b>9 015 164</b>	<b>8 522 492</b>	<b>-5,5</b>
Other sales				402 284	249 912	-37,9
<b>Total sales</b>				<b>15 961 705</b>	<b>14 558 212</b>	<b>-8,8</b>

<sup>1</sup> Revised figures.<sup>2</sup> Preliminary figures.

**Table 9 – Details of purchases in the ocean (marine) fisheries and related services industry, 2019 and 2020**

Item	2019 <sup>1</sup>		2020 <sup>2</sup>		% change
	R'000	% contribution	R'000	% contribution	
Provisions (victuals for the crew)	165 859	2,2	123 704	1,7	-25,4
Consumables, including protective clothing	144 694	1,9	149 666	2,0	3,4
Fuel and lubricants (e.g. oils and greases)	1 008 939	13,3	849 932	11,3	-15,8
Coal and gas	103 793	1,4	115 675	1,5	11,4
Containers, pallets and other packaging materials	480 770	6,3	455 049	6,1	-5,3
Fishing gear (e.g. hooks, lines, sinkers, lures, bait), excluding capitalised expenditure	184 900	2,4	176 507	2,4	-4,5
Dry ice	101 668	1,3	90 980	1,2	-10,5
Fish and marine animal, unprocessed	1 407 309	18,6	1 273 295	17,0	-9,5
Fish and marine animal, processed	3 162 653	41,8	3 488 370	46,6	10,3
Ingredients for processing	133 827	1,8	168 582	2,2	26,0
Other purchases and transfers-in of goods and materials	681 068	9,0	601 536	8,0	-11,7
<b>Total purchases and transfers-in of goods and materials</b>	<b>7 575 480</b>	<b>100,0</b>	<b>7 493 296</b>	<b>100,0</b>	<b>-1,1</b>

<sup>1</sup> Revised figures.<sup>2</sup> Preliminary figures.

**Table 10 – Inventory in the ocean (marine) fisheries and related services industry, 2019 and 2020**

Item	2019 <sup>1</sup>		2020 <sup>2</sup>		% change
	R'000	% contribution	R'000	% contribution	
<b>Total value of opening inventory</b>	<b>1 483 506</b>	<b>100,0</b>	<b>1 785 751</b>	<b>100,0</b>	<b>20,4</b>
Raw material or material for processing, packaging materials, fuel and maintenance stores (e.g. spares)	294 851	19,9	403 233	22,6	36,8
Work in progress	57 872	3,9	78 091	4,4	34,9
Finished goods produced by the enterprise	642 409	43,3	611 099	34,2	-4,9
Finished goods not produced by the enterprise, but purchased for resale	488 374	32,9	693 328	38,8	42,0
<b>Total value of closing inventory</b>	<b>1 903 539</b>	<b>100,0</b>	<b>2 188 205</b>	<b>100,0</b>	<b>15,0</b>
Raw material or material for processing, packaging materials, fuel and maintenance stores (e.g. spares)	444 421	23,3	470 253	21,5	5,8
Work in progress	72 587	3,8	177 447	8,1	144,5
Finished goods produced by the enterprise	715 142	37,6	835 891	38,2	16,9
Finished goods not produced by the enterprise, but purchased for resale	671 389	35,3	704 614	32,2	4,9

<sup>1</sup> Revised figures.<sup>2</sup> Preliminary figures.

## Explanatory notes

<b>Background</b>	<p>The results presented in this publication have been derived from the 2019 and 2020 ocean (marine) fisheries and related services industry survey. This is a survey of enterprises operating in the ocean (marine) fisheries and related services industry.</p> <p>A list of enterprises was drawn from Stats SA's business register (BR) to conduct the 2020 survey of ocean (marine) fisheries and related services. Stats SA continuously updates its business register, based on the units registered for value added tax (VAT).</p> <p>All figures exclude value added tax (VAT).</p>
<b>Reference period</b>	The information was collected from enterprises for their financial year ending on any date between 1 July 2019 and 30 June 2020.
<b>Purpose of the survey</b>	Results of survey are used within Stats SA for benchmarking national accounts (e.g. the gross domestic product (GDP)) and compiling supply-use tables. These statistics are also used by government to develop and monitor policies and plans to grow the economy and create jobs. The private sector uses the data to analyse comparative businesses.
<b>Classification by industry</b>	The 1993 edition of the <i>Standard Industrial Classification of all Economic Activities (SIC)</i> , 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 (ISIC)</i> with suitable adaptations for local conditions. Each enterprise is classified to an industry which reflects its predominant activity.
<b>Statistical unit</b>	The survey 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.
<b>Survey methodology and design</b>	The survey of enterprises in the ocean (marine) fisheries and related services was conducted by email, telephone and personal visits. The census was conducted from a frame of approximately 400 enterprises.
<b>Collection rate</b>	Collection rate = ((collected enterprises + finalised investigations) / sample size)*100. The collection rate was 78,3%.
<b>Turnover collection rate</b>	Turnover collection rate = ((weighted collected units BR turnover + weighted finalised investigations BR turnover) / population turnover) x 100. The turnover collection rate was 97,0%.
<b>Non-sampling errors</b>	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.
<b>Rounding off of figures</b>	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.
<b>Turnover</b>	<p>Turnover includes:</p> <ul style="list-style-type: none"> <li>• value of sales of goods;</li> <li>• amount received for services rendered; and</li> <li>• income from rental, leasing and hiring.</li> </ul>

**Symbols and abbreviations**

BR	Business register
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

<b>Current assets</b>	These are assets that can be converted into cash within twelve months. They include: <ul style="list-style-type: none"> <li>• Trade and other receivables;</li> <li>• Cash and bank;</li> <li>• Inventory; and</li> <li>• Other current assets.</li> </ul>
<b>Current liabilities</b>	These are debts or obligations that are due within twelve months. They include: <ul style="list-style-type: none"> <li>• Trade and other payables;</li> <li>• Bank overdraft; and</li> <li>• Other current liabilities.</li> </ul>
<b>Employees</b>	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).
<b>Enterprise</b>	A legal unit or a combination of legal units that includes and directly controls all functions necessary to carry out its production activities.
<b>Equity</b>	Residual interest in the enterprise's assets after deducting its liabilities.
<b>Industry</b>	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.
<b>Non-current assets</b>	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"> <li>• Property, plant and equipment and intangible assets;</li> <li>• Goodwill;</li> <li>• Long-term investments; and</li> <li>• Other non-current assets.</li> </ul>
<b>Non-current liabilities</b>	Liabilities that are not required to be paid within 12 months. They include: <ul style="list-style-type: none"> <li>• Long-term loans; and</li> <li>• Other non-current liabilities.</li> </ul>
<b>Other assets</b>	Includes: <ul style="list-style-type: none"> <li>• Other intangible assets</li> </ul>
<b>Other current expenditure</b>	Includes: <ul style="list-style-type: none"> <li>• Accommodation;</li> <li>• Bursaries;</li> <li>• Donations and sponsorships;</li> <li>• Entertainment;</li> <li>• Management and administrative fees;</li> <li>• Motor vehicle running expenditure;</li> <li>• Rental on land, buildings and other structures;</li> <li>• Quota, harbour and permit fees;</li> <li>• Research and development costs;</li> <li>• Regional service levels; and</li> <li>• Membership or affiliation costs.</li> </ul>

<b>Other income</b>	Includes: <ul style="list-style-type: none"><li>• Rental on land, buildings and other structures; and</li><li>• Water rights traded.</li></ul>
<b>Permanent employees</b>	Employees appointed on an open-ended contract with no stipulated termination date or a fixed-term contract for periods of more than one year.
<b>Profit margin</b>	Profit margin is derived as: Net profit or loss after tax <b>Divided by</b> turnover <b>Multiplied by</b> 100
<b>Sales of goods</b>	Includes: <ul style="list-style-type: none"><li>• Income from sales and transfers-out of own-caught fish and other products;</li><li>• Income from the sales and transfers-out of processed fish; and</li><li>• Other sales.</li></ul>
<b>Services rendered</b>	Includes: <ul style="list-style-type: none"><li>• Services related to marine fisheries;</li><li>• Quota fees received;</li><li>• Catch fees received;</li><li>• Processing fees received;</li><li>• Cold storage; and</li><li>• Other services (e.g. grading and sorting of fish).</li></ul>



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