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1. Introduction

This publication presents estimates in respect of the ocean (marine) fisheries and related services industry for 2023. The survey aims to provide financial, production, employment and related information for the ocean (marine) fisheries and related services industry in South Africa.

The last ocean (marine) fisheries and related services industry survey was conducted in 2020 (Report No. 13-00-00 (2020)).

1.1 Scope and coverage

The 2023 ocean (marine) fisheries and related services industry survey covers enterprises registered for value-added tax (VAT) and which are mainly or primarily engaged in the following activities, classified 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, details of employment, income, expenditure, details of purchases and details of sales.

1.3 Reference period

The questionnaires were completed for the financial year ending on any date between 1 July 2022 and 30 June 2023, according to the usual reporting schedule of the enterprise, with the following exception:

- Employment as at 30 June 2023.

1.4 Current prices

The rand values are at current prices.

1.5 Reliability of data

The following are some of the likely sources of non-sampling errors: sampling frame not up to date, incorrect definitions and classifications, 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 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 – Income in the ocean (marine) fisheries and related services industry, 2018–2023

	Total income
	R'000
2018	16 119 739
2019	17 544 256
2020	15 954 036
2023	19 912 542
% change (2018 and 2019)	8,8
% change (2019 and 2020)	-9,1
Annualised % change (2020 and 2023)	7,7

The total income in the ocean (marine) fisheries and related services industry in 2023 was R19,9 billion, which is an annualised increase of 7,7% compared with the total income reported in 2020 (R16,0 billion).

Table B – Concentration ratio for total income in the ocean (marine) fisheries and related services industry, 2018–2023

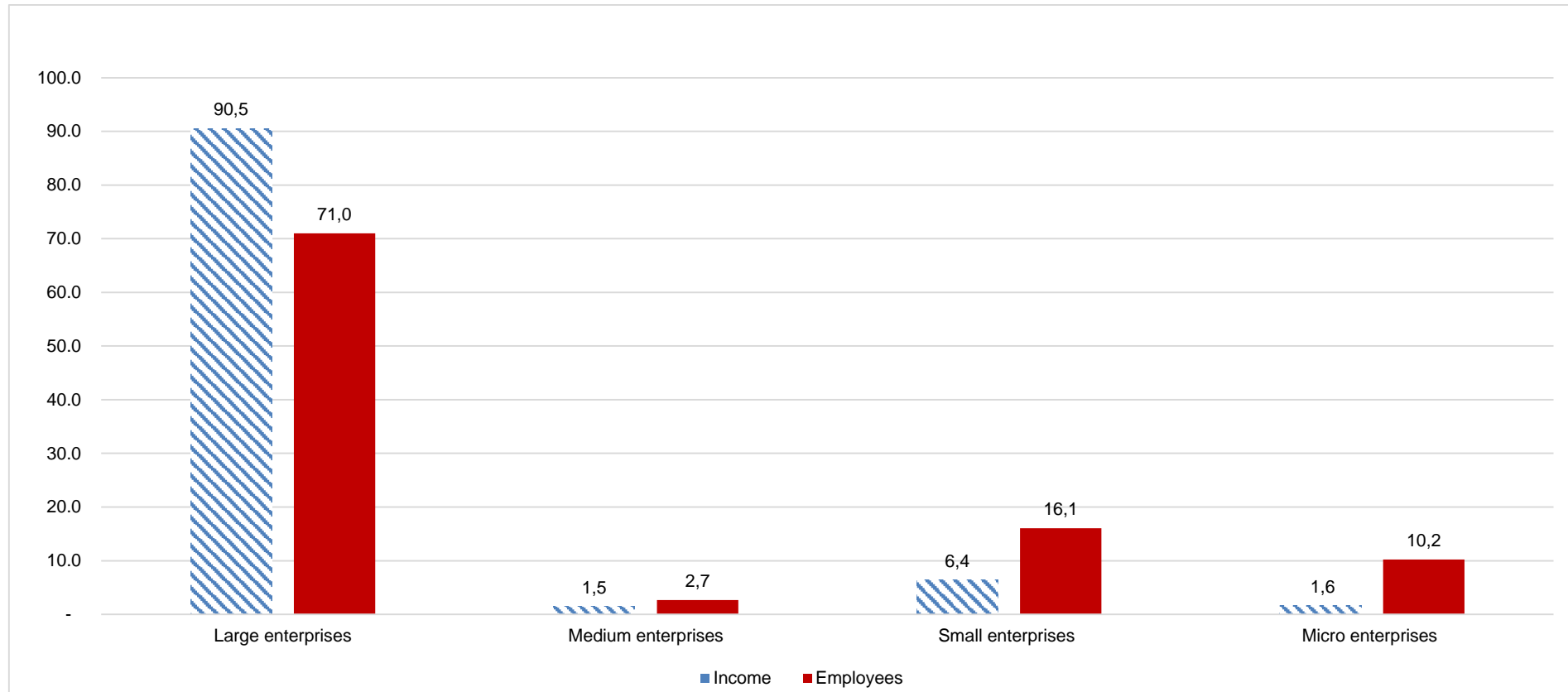
Concentration ratio	2018	2019	2020	2023
	%			
CR5	58,3	61,2	67,0	65,3
CR10	68,5	73,0	75,8	75,1
CR20	77,7	81,9	83,6	82,9
CR50	86,9	90,4	91,8	91,4
CR100	92,8	95,0	95,8	95,5

In 2023, the top 10 and top 50 enterprises in the ocean (marine) fisheries and related services industry contributed 75,1% and 91,4% to the total income respectively. Across all categories shown in Table B (i.e. from CR5 to CR100), the concentration ratios were the highest in 2020 and the lowest in 2018.

Table C – Employment at the end of June in the ocean (marine) fisheries and related services industry, 2018–2023

Gender	2018		2019		2020		2023	
	Number	% contribution	Number	% contribution	Number	% contribution	Number	% contribution
Female	5 319	32,5	4 632	29,3	4 451	29,6	4 821	29,6
Male	11 059	67,5	11 179	70,7	10 574	70,4	11 457	70,4
Total employees	16 378	100,0	15 811	100,0	15 025	100,0	16 278	100,0

The number of persons employed in the ocean (marine) fisheries and related services industry in 2023 was 16 278. This represents an annualised increase of 2,7% compared with the number of persons employed in 2020 (15 025). The largest number of persons employed in 2023 was male employees (11 457 or 70,4%).

Figure 1 – Percentage contribution of income and employment by enterprise size in the ocean (marine) fisheries and related services industry, 2023

Large enterprises (those with an annual turnover greater than R35 million) contributed 90,5% to the total income of the ocean (marine) fisheries and related services industry in 2023, whereas their contribution to employment was 71,0%. Small, medium and micro enterprises (SMMEs) contributed 9,5% to the total income, while their percentage contribution to employment was 29,0%.

Table D – Average salaries and wages in the ocean (marine) fisheries and related services industry, 2018–2023

Year	Salaries and wages	Total employees	Average salaries and wages
	R'000	Number	Rand
2018	2 738 399	16 378	167 200
2019	2 847 613	15 811	180 103
2020	2 862 924	15 025	190 544
2023	3 141 386	16 278	192 984

The average salaries and wages in the ocean (marine) fisheries and related services industry showed an annualised increase of 0,4%, from R190 544 in 2020 to R192 984 in 2023.

Table E – Sales and transfers-out of own-caught fish and other fish products in the ocean (marine) fisheries and related services industry, 2020 and 2023

Type of product	2020		2023	
	R'000	% contribution	R'000	% contribution
Anchovy	418 020	9,2	367 113	6,8
Hake	1 021 361	22,5	1 443 763	26,9
Kingklip	75 897	1,7	43 396	0,8
Lobster	620 527	13,7	732 675	13,7
Pilchard/sardine	115 300	2,5	135 188	2,5
Squid	1 086 626	24,0	1 161 408	21,6
Tuna	203 770	4,5	380 292	7,1
Other own-caught fish and other fish products	991 420	21,9	1 101 645	20,5
Total sales and transfers-out of own-caught fish and other fish products	4 532 921	100,0	5 365 480	100,0

The total sales and transfers-out of own-caught fish and other fish products showed an annualised increase of 5,8% between 2020 and 2023 (from R4,5 billion to R5,4 billion). The largest increases were reported for 'hake' (+R0,4 billion), 'tuna' (+R0,2 billion), 'lobster' (+R0,1 billion) and 'squid' (+R0,1 billion).

'Hake' sales (26,9%) were the largest contributor to the total sales and transfers-out of own-caught fish and other fish products in 2023, followed by 'squid' (21,6%).

Table F – Sales and transfers-out of processed fish in the ocean (marine) fisheries and related services industry, 2020 and 2023

Type of product	2020		2023	
	R'000	% contribution	R'000	% contribution
Fish, frozen (excluding fish fillets and fish meat)	1 577 142	16,8	1 942 665	15,3
Fish, frozen fillets and meat; fish livers and roes	1 194 347	12,7	1 571 146	12,4
Fish, otherwise prepared or preserved	5 668 449	60,3	7 802 579	61,4
Flour, meals or meals or pellets of fish, crustaceans, molluscs and aquatic invertebrates, inedible	725 979	7,7	920 554	7,2
Other marine products	239 725	2,5	468 543	3,7
Total sales and transfers-out of processed fish	9 405 642	100,0	12 705 487	100,0

The total sales and transfers-out of processed fish in the ocean (marine) fisheries and related services industry in 2023 was R12,7 billion, which is an annualised increase of 10,5% from R9,4 billion in 2020. The largest increases were reported for 'fish, otherwise prepared or preserved' (+R2,1 billion), 'fish fillets and meat; fish livers and roes' (+R0,4 billion) and 'fish, frozen (excluding fish fillets and fish meat)' (+R0,4 billion).


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3. Tables

Table 1 – Principal statistics in the ocean (marine) fisheries and related services industry, 2020 and 2023

	Total income	Total expenditure	Salaries and wages	Number of employees
	R'000			Number
2020 ¹	15 954 036	14 687 232	2 862 924	15 025
2023 ²	19 912 542	17 583 378	3 141 386	16 278
Annualised % change	7,7	6,2	3,1	2,7

¹ Revised figures.

² Preliminary figures.

Table 2 – Type of income in the ocean (marine) fisheries and related services industry, 2020 and 2023

Type of income	2020 ¹		2023 ²		Annualised % change
	R'000	% contribution	R'000	% contribution	
Sales of goods	14 558 211	91,3	18 208 356	91,4	7,7
Services rendered	417 608	2,6	460 195	2,3	3,3
Profits on financial and other assets	199 204	1,2	433 505	2,2	29,6
Other income	779 013	4,9	810 486	4,1	1,3
Total income	15 954 036	100,0	19 912 542	100,0	7,7

¹ Revised figures.

² Preliminary figures.

Table 3 – Type of expenditure in the ocean (marine) fisheries and related services industry, 2020 and 2023

Type of expenditure	2020 ¹		2023 ²		Annualised % change
	R'000	% contribution	R'000	% contribution	
Purchases	7 493 296	51,0	10 021 632	57,0	10,2
Salaries and wages	2 862 924	19,5	3 141 386	17,9	3,1
Depreciation	482 160	3,3	623 134	3,5	8,9
Electricity and water	193 418	1,3	199 164	1,1	1,0
Insurance premiums	90 727	0,6	158 692	0,9	20,5
Interest paid	444 063	3,0	346 835	2,0	-7,9
Losses on financial and other assets	117 719	0,8	181 669	1,0	15,6
Repairs and maintenance	583 858	4,0	619 963	3,5	2,0
Other expenditure	2 419 067	16,5	2 290 903	13,0	-1,8
Total expenditure	14 687 232	100,0	17 583 378	100,0	6,2

¹ Revised figures.² Preliminary figures.**Table 4 – Employment by gender in the ocean (marine) fisheries and related services industry, 2020 and 2023**

Gender	2020 ¹	2023 ²	Annualised % change
	Number of employees		
Female	4 451	4 821	2,7
Male	10 574	11 457	2,7
Total employees	15 025	16 278	2,7

¹ Revised figures.² Preliminary figures.

Table 5 – Employment by occupation and gender in the ocean (marine) fisheries and related services industry, as at 30 June 2023²

Gender	2023					Total
	Number of employees					
	Officers	Crew	Office staff	Seasonal employees	All other employees	
Female	8	339	751	941	2 782	4 821
Male	1 129	5 256	542	2 264	2 266	11 457
Total	1 137	5 595	1 293	3 205	5 048	16 278

² Preliminary figures.**Table 6 – Income and employment by enterprise size in the ocean (marine) fisheries and related services industry, 2023²**

Enterprise size	Income		Employees	
	R'000	% contribution	Number	% contribution
Large enterprises	18 026 469	90,5	11 560	71,0
Medium enterprises	291 661	1,5	439	2,7
Small enterprises	1 271 323	6,4	2 614	16,1
Micro enterprises	323 089	1,6	1 665	10,2
Total	19 912 542	100,0	16 278	100,0

² Preliminary figures.

Table 7 – Sales and transfers-out of own-caught fish by type of product in the ocean (marine) fisheries and related services industry, 2020 and 2023

Type of product	2020 ¹	2023 ²	Annualised % change	2020 ¹	2023 ²	Annualised % change
	Metric tons			R'000		
Anchovy	149 106	152 431	0,7	418 020	367 113	-4,2
Hake	32 997	33 189	0,2	1 021 361	1 443 763	12,2
Kingklip	1 427	749	-19,3	75 897	43 396	-17,0
Lobster	1 315	1 324	0,2	620 527	732 675	5,7
Pilchard/sardine	19 442	23 006	5,8	115 300	135 188	5,4
Squid	12 030	7 574	-14,3	1 086 626	1 161 408	2,2
Tuna	5 237	10 924	27,8	203 770	380 292	23,1
Other own-caught fish and other fish products				991 420	1 101 645	3,6
Total sales and transfers-out of own-caught fish and other fish products				4 532 921	5 365 480	5,8

¹ Revised figures.² Preliminary figures.

Table 8 – Sales and transfers-out of processed fish by type of product in the ocean (marine) fisheries and related services industry, 2020 and 2023

Type of product	2020 ¹	2023 ²	Annualised % change	2020 ¹	2023 ²	Annualised % change
	Metric tons			R'000		
Fish, frozen (excluding fish fillets and fish meat)	49 296	50 049	0,5	1 577 142	1 942 665	7,2
Fish, frozen fillets and meat; fish livers and roes	20 331	19 176	-1,9	1 194 347	1 571 146	9,6
Fish, otherwise prepared or preserved	143 944	144 926	0,2	5 668 449	7 802 579	11,2
Flour, meals or meals or pellets of fish, crustaceans, molluscs and aquatic invertebrates, inedible	39 721	33 582	-5,4	725 979	920 554	8,2
Other marine products				239 725	468 543	25,0
Total sales and transfers-out of processed fish				9 405 642	12 705 487	10,5

¹ Revised figures.² Preliminary figures.**Table 9 – Type of purchases in the ocean (marine) fisheries and related services industry, 2020 and 2023**

Type of purchases	2020 ¹		2023 ²		Annualised % change
	R'000	% contribution	R'000	% contribution	
Fuel lubricants and greases	849 932	11,3	1 071 935	10,7	8,0
Containers, pallets and packaging materials	570 723	7,6	613 392	6,1	2,4
Fish	4 761 665	63,5	6 196 252	61,8	9,2
Other purchases	1 310 976	17,5	2 140 053	21,4	17,7
Total purchases	7 493 296	100,0	10 021 632	100,0	10,2

¹ Revised figures.² Preliminary figures.

Table 10 – Employment by age group of fisheries operator/manager in the ocean (marine) fisheries and related services industry, 2023²

Age group	Number
15 – 34	7
35 – 44	44
45 – 54	71
55 – 64	64
65+	17
Unspecified	42
Total	245

² Preliminary figures.**Table 11 – Employment by gender of fisheries operator/manager in the ocean (marine) fisheries and related services industry, 2023²**

Gender	Number
Female	22
Male	223
Total	245

² Preliminary figures.

Explanatory notes

Background

The results presented in this publication have been derived from the 2023 ocean (marine) fisheries and related services industry survey. This publication summarises data on the size, structure and nature of the ocean (marine) fisheries and related services industry.

The frame was drawn from Stats SA's statistical business register (SBR). The SBR is mainly based on the value-added tax (VAT) database of the South African Revenue Service (SARS).

The last ocean (marine) fisheries and related services industry survey was conducted for the year 2020 (Report No. 13-00-00 (2020)).

Value-added tax (VAT)

All figures exclude VAT.

Reference period

The information was collected from enterprises for their financial year which ended on any date between 1 July 2022 and 30 June 2023.

Statistical unit

The statistical unit 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 production activities.

Classification

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.

Size groups

The enterprises are divided into four size groups according to the value of income recorded for the survey, as shown in the table below.

Table G – Income size groups for the ocean (marine) fisheries and related services industry, 2023

Size group	Annual turnover
Large enterprises	Turnover > R35 000 000
Medium enterprises	R21 000 000 < Turnover ≤ R35 000 000
Small enterprises	R3 500 000 < Turnover ≤ R21 000 000
Micro enterprises	Turnover ≤ R3 500 000

Survey methodology and design

Initially, telephones were used to contact enterprises and update their information on the frame in terms of specific ocean (marine) fisheries and related services activity and location. Enterprises were given an option of either sending a completed questionnaire or a visit by a Stats SA official. CAPI (Computer Assisted Personal Interview) was used to capture the data.

Collection rate

Collection rate = ((collected enterprises + finalised investigations) / sample size)*100. The collection rate was 80,6%.

Turnover collection rate	Turnover collection rate = ((weighted collected enterprises SBR turnover + weighted finalised investigations SBR turnover)/ population turnover)*100. The turnover collection rate was 98,1%.	
Revisions to 2020 results	Revised figures are mainly due to late submission of data to Stats SA, or respondents reporting revisions or corrections to their figures. Figures for 2023 are preliminary and subject to revision.	
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.	
Unpublished data	Where possible, Stats SA makes available unpublished statistics on request.	
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	GDP	Gross domestic product
	SARS	South African Revenue Service
	SBR	Statistical business register
	Stats SA	Statistics South Africa
	VAT	Value-added tax
	0	Nil or less than half the final digit shown
	A blank space	Figures not available

Glossary

Employees	People employed by the business or organisation who received payment (salaries, wages, commission, piece rates or payments in kind) for the last pay period ended on or before 30 June.
Enterprise	A legal unit or a combination of legal units that includes and directly controls all functions necessary to carry out its activities.
Industry	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</i> (SNA) in the same way as in the <i>Standard industrial Classification of All Economic activities</i> (SIC), Fifth Edition, Report No. 09-90-02 of January 1993.
Other current expenditure	<p>Includes:</p> <ul style="list-style-type: none">• accommodation;• bursaries;• donations and sponsorships;• entertainment;• management and administrative fees;• quota, harbour and permit fees;• research and development costs;• regional service levels; and• membership or affiliation costs.
Other income	<p>Includes:</p> <ul style="list-style-type: none">• water rights traded;• dividends; and• insurance.
Sales of goods	<p>Includes:</p> <ul style="list-style-type: none">• 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	<p>Includes:</p> <ul style="list-style-type: none">• 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).