

# **Motor trade industry report, 2012**

Statistics South Africa

Report No. 63-01-02 (2012)

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**Motor trade industry, 2012** / Statistics South Africa

Published by Statistics South Africa, Private Bag X44, Pretoria 0001

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Stats SA Library Cataloguing-in-Publication (CIP) Data

**Motor trade industry, 2012**/ Statistics South Africa. Pretoria: Statistics South Africa, 2014

**[Report No. 63-01-02 (2012)]**

**44pp**

**ISBN: 978-0-621-42890-2**

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## Motor trade industry, 2012

### 1. Introduction

This publication presents estimates in respect of the 2012 motor trade industry large sample survey (LSS). The 2012 motor trade industry LSS collected data from a sample of approximately 3 000 enterprises. The reporting period was the financial year ended on any date between 1 July 2011 and 30 June 2012. The data for the number of employees were provided for the last pay period ended on or before 30 June 2012. The sample was stratified in such a way that all large enterprises (those with turnover greater than R78 million) were completely enumerated.

The last motor trade LSS was conducted for 2009 (Report No. 63-01-02 (2009)).

#### 1.1. Scope and coverage

The 2012 motor trade industry LSS covers enterprises registered for value added tax (VAT) and income tax (IT) that are mainly 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. 09-09-02:

- Wholesale sales of motor vehicles (SIC 6311)
- Retail sales of motor vehicles (SIC 6312)
- Maintenance and repair of motor vehicles (SIC 6320)
- Sale of new motor vehicle parts and accessories (SIC 6331)
- Sale of used motor vehicle parts and accessories (SIC 6332)
- Sale, maintenance and repair of motor cycles and related parts and accessories (SIC 6340)
- Retail sales of automotive fuel (SIC 6350)

#### The following activities are excluded:

- Renting of cars or trucks with drivers (SIC 7122)
- Freight transportation by road (SIC 7122)
- Non-scheduled passenger land transport (SIC 7123)
- Renting of motor vehicles and motor-cycles without drivers (SIC 8511)

#### 1.2. Data items

The following categories of data items were collected: industrial classification, details of employment, trading income, expenditure, profit or loss, inventories, carrying value of assets, details of sales, details of purchases, information and communication technology usage and client base.

### 1.3. Reference period

The questionnaires were completed for the financial year of the enterprise which **ended on any date between 1 July 2011 and 30 June 2012**, according to the usual reporting schedule of the enterprise.

#### *Examples*

- 1 October 2010 – 30 September 2011
- 1 January 2011 – 31 December 2011
- 1 February 2011 – 31 January 2012
- 1 March 2011 – 29 February 2012
- 1 April 2011 – 31 March 2012

### 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 estimates presented in this publication are subject to sampling variability since they are based on information obtained from a sample. That is, they might differ from the figures that would have been produced if the data had been obtained from all enterprises in the motor trade 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 error likely to have occurred due to sampling, and thus avoids the need to refer to the size of the estimate. The larger the RSE, the less reliable the estimate. 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 the 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.

### 1.6. Confidentiality

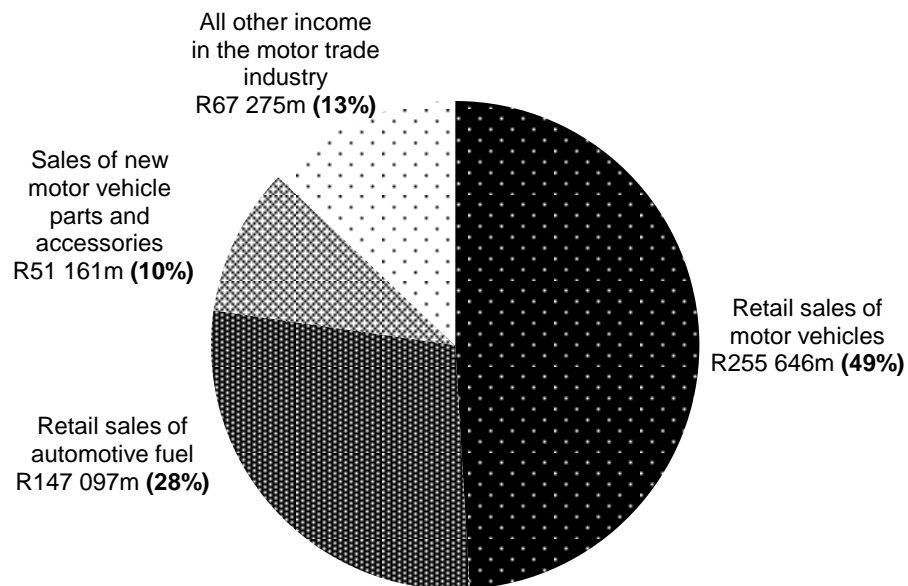
According to section 17 of the Statistics Act, 1999 (Act No. 6 of 1999), completed questionnaires remain confidential to Statistics South Africa (Stats SA). Individual business information is never disclosed. Results are presented in aggregated form only.

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

## 2. Summary of findings for the year 2012

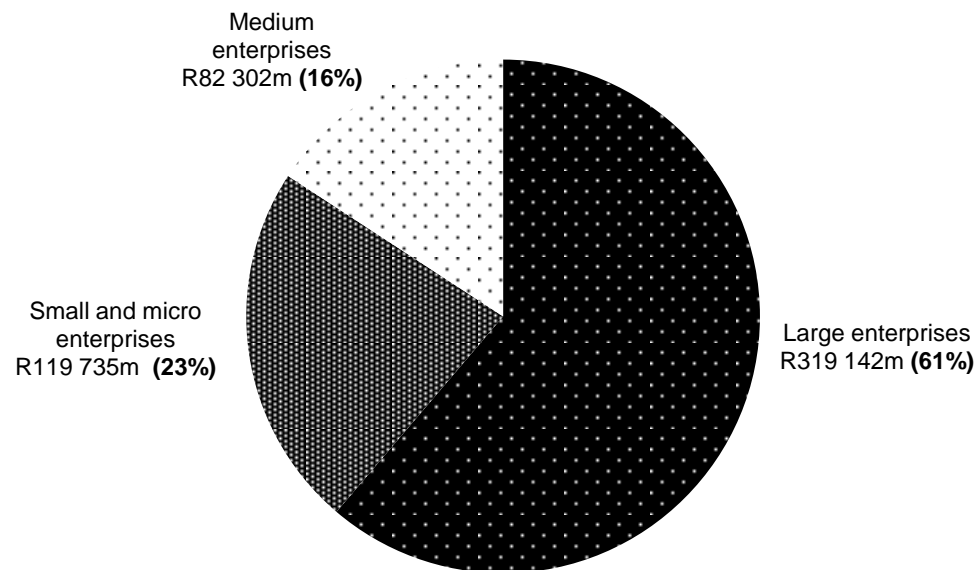
**Figure 1 – Income in the motor trade industry, 2012**



The total income for the motor trade industry in 2012 was R521 179 million. The largest contributor to the total income was 'retail sales of motor vehicles' (R255 646 million or 49%), followed by 'retail sales of automotive fuel' (R147 097 million or 28%), and 'sales of new motor vehicle parts and accessories' (R51 161 million or 10%) (Figure 1 and Table 6, page 11).

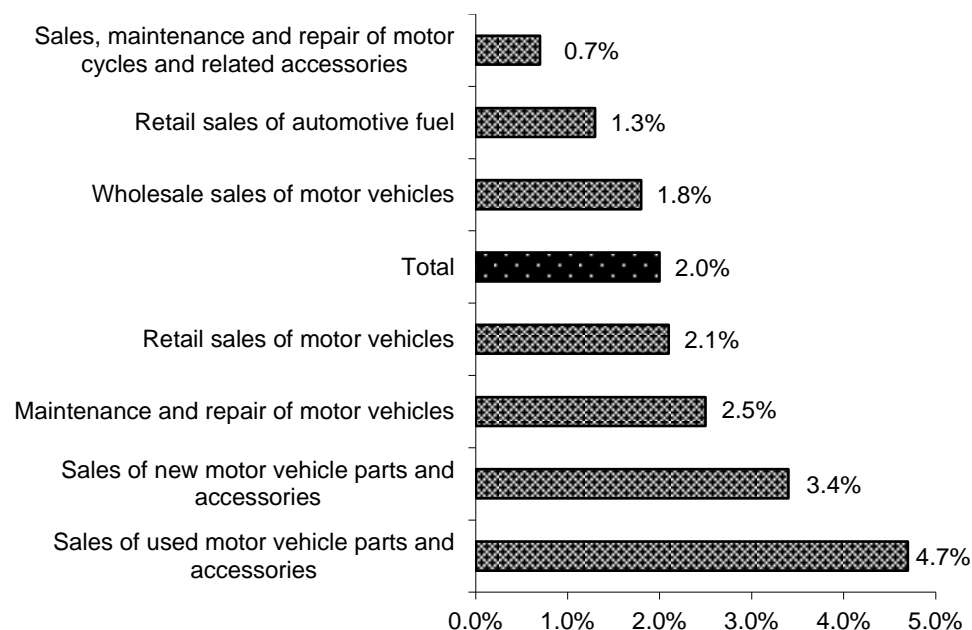
The total income represents an increase of 11,3% per annum over the income reported in the corresponding survey of 2009 (R378 266 million).

**Figure 2 – Income by enterprise size in the motor trade industry, 2012**



Large enterprises (those with turnover equal to or greater than R78 million) generated R319 142 million or 61% of the total income of the motor trade industry in 2012, followed by small and micro enterprises (R119 735 million or 23%) and medium enterprises (R82 302 million or 16%) (Figure 2 and Table 7, page 12).

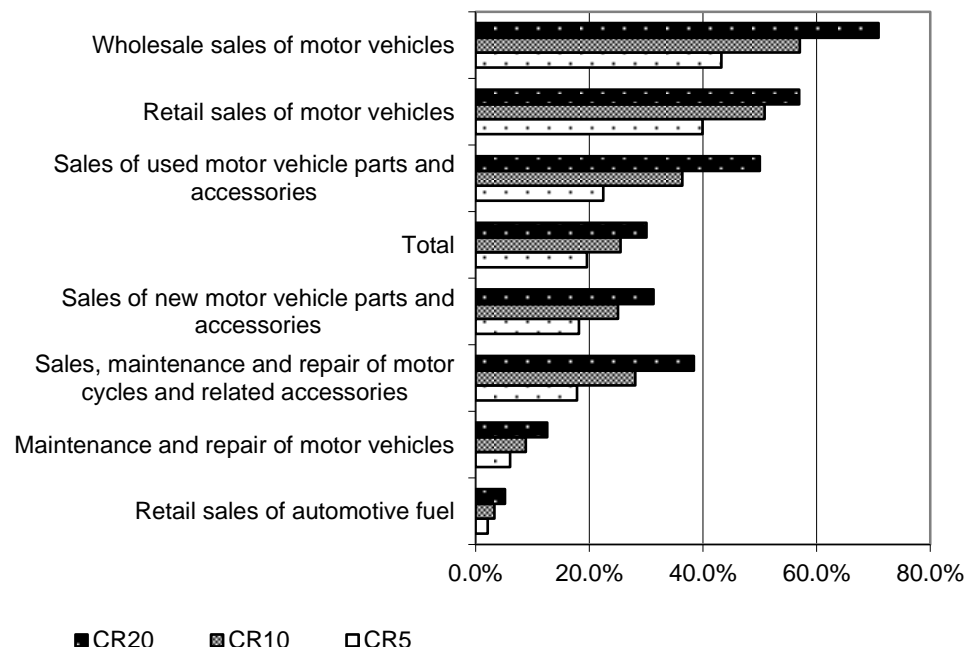
**Figure 3 – Profit margin in the motor trade industry, 2012**



The profit margin for the motor trade industry was 2,0% in 2012. ‘Sales of used motor vehicle parts and accessories’ had the highest profit margin at 4,7%, followed by ‘sales of new motor vehicle parts and accessories’ at 3,4%. ‘Sales, maintenance and repair of motor cycles and related accessories’ had the lowest profit margin at 0,7% (Figure 3 and Table 4, page 10).

The profit margin in the corresponding survey for 2009 was 2,2%.

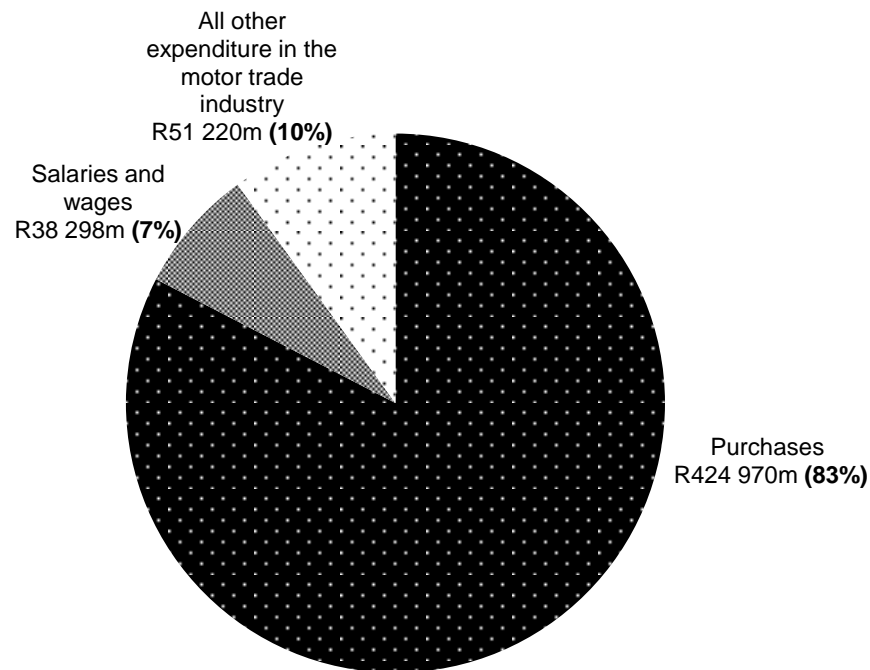
**Figure 4 – Concentration ratios (CR) in the motor trade industry, 2012**



The 20 largest enterprises contributed 38,6% of the total income of the motor trade industry in 2012. ‘Wholesale sales of motor vehicles’ had the highest concentration ratios in all three categories: CR5 (43, 3%), CR10 (57,1%) and CR20 (70,9%). ‘Retail sales of automotive fuel’ had the lowest concentration ratios in all three categories: CR5 (2,1%), CR10 (3,3%) and CR20 (5,2%) (Figure 4 and Table 8, page13).

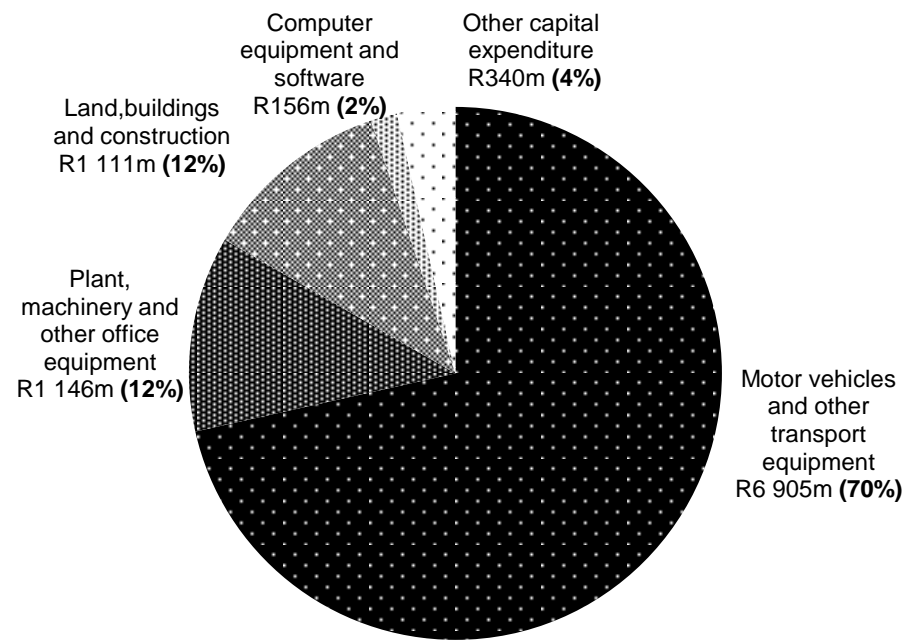


**Figure 5 – Composition of expenditure in the motor trade industry, 2012**



Expenditure in the motor trade industry in 2012 amounted to R514 488 million. The largest contributor to total expenditure was ‘purchases’ (R424 970 million or 83%), followed by ‘salaries and wages’ (R38 298 million or 7%) (Figure 5 and Table 10, pages15-16).

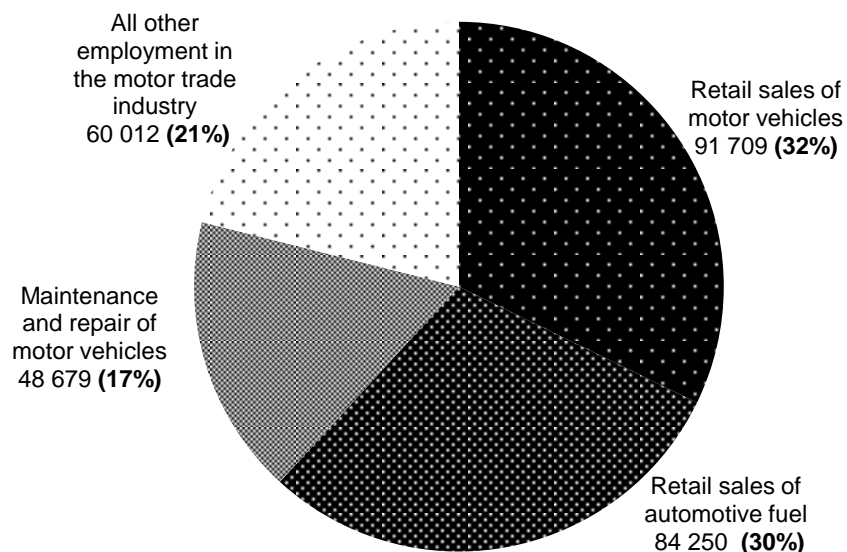
**Figure 6 – Capital expenditure on new assets in the motor trade industry, 2012**



The total capital expenditure on new assets in the motor trade industry in 2012 was R9 658 million. The largest category of capital expenditure was ‘motor vehicles and other transport equipment’ (R6 905 million or 70%), followed by ‘plant, machinery and other office equipment’ (R1 146 million or 12%) and ‘land, buildings and construction’ (R1 111 million or 12%) (Figure 6 and Table 14, page 20).

Capital expenditure on new assets increased by 14,2% per annum compared with the corresponding survey of 2009 (R6 485 million).

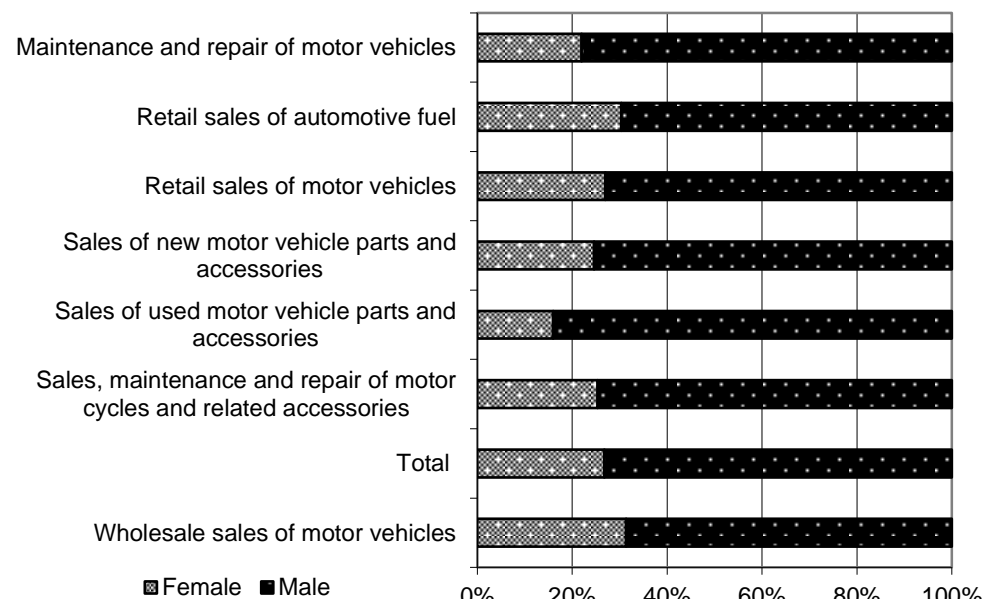
**Figure 7 – Employment in the motor trade industry, 2012**



The total number of persons employed in the motor trade industry at the end of June 2012 was 284 650. 'Retail sales of motor vehicles' employed the largest number of persons (91 709 or 32%), followed by 'retail sales of automotive fuel' (84 250 or 30%) and 'maintenance and repair of motor vehicles' (48 679 or 17%) (Figure 7 and Table 16, page 21).

Employment in the motor trade industry increased by 3,3% per annum compared with the number of employees reported in the corresponding survey of 2009 (258 377).

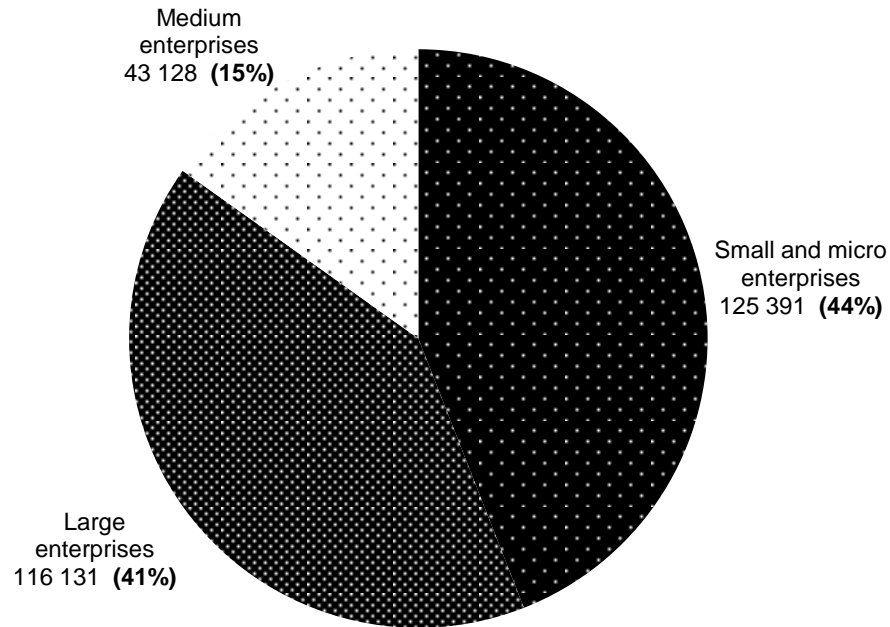
**Figure 8 – Gender ratios in the motor trade industry, 2012**



The proportion of females out of the total persons employed was 26,8%. The industries with the highest proportion of females employed were 'wholesale sales of motor vehicles' (31,4%) and 'retail sales of automotive fuel' (30,4%) (Figure 8 and Table 16, page 21).

The proportion of females employed in the motor trade industry for the corresponding survey of 2009 was 28,0%.

**Figure 9 – Employment by size in the motor trade industry, 2012**



Employment by enterprise size indicates that small and micro enterprises (those with turnover less than R38 million) had the highest number of employees (125 391 or 44%), followed by large enterprises (116 131 or 41%) and medium enterprises (43 128 or 15%) (Figure 9 and Table 18, page 23).

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**Tables**

**Table 1 – Principal statistics in the trade industry<sup>1</sup>, 2009 and 2012**

Item	Turnover	Total Income	Total expenditure	Total value of opening inventory	Total value of closing inventory	Net profit or loss 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 million									Number
<b>2009</b>	1 838 049	1 880 410	1 813 810	166 635	182 004	81 969	159 373	176 090	37 283	1 592 083
<b>2012</b>	2 293 034	2 352 879	2 296 197	207 238	239 545	88 989	203 362	213 840	44 086	1 735 350
<b>Annualised % change</b>	<b>7,7</b>	<b>7,8</b>	<b>8,2</b>	<b>7,5</b>	<b>9,6</b>	<b>2,8</b>	<b>8,5</b>	<b>6,7</b>	<b>5,7</b>	<b>2,9</b>

<sup>1</sup>The trade industry comprises wholesale trade, retail trade, motor trade, maintenance and repairs, hotels and restaurants.

**Table 2 – Principal statistics in the motor trade industry, 2009 and 2012**

Item	Turnover	Total income	Total expenditure	Total value of opening inventory	Total value of closing inventory	Net profit or loss 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 million									Number of employees
<b>2009</b>	371 624	378 266	367 734	36 207	35 853	10 178	19 949	26 882	6 485	258 377
<b>2012</b>	513 912	521 179	514 488	42 178	50 038	14 551	34 019	33 552	9 658	284 650
<b>Annualised % change</b>	<b>11,4</b>	<b>11,3</b>	<b>11,8</b>	<b>5,2</b>	<b>11,8</b>	<b>12,7</b>	<b>19,5</b>	<b>7,7</b>	<b>14,2</b>	<b>3,3</b>

**Table 3 – Principal statistics in the motor trade industry, 2012**

Type of motor trade	Total income	Total expenditure	Total value of opening inventory	Total value of closing inventory	Net profit or loss 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
	R million							
Wholesale sales of motor vehicles	37 010	37 382	5 763	7 236	1 101	693	675	112
Retail sales of motor vehicles	255 646	252 761	25 904	30 518	7 499	21 883	21 170	7 871
Maintenance and repair of motor vehicles	24 857	24 148	1 319	1 457	847	2 995	3 066	592
Sales of new motor vehicle parts and accessories	51 161	49 787	6 346	7 414	2 442	3 744	3 704	476
Sales of used motor vehicle parts and accessories	2 331	2 251	244	311	147	210	215	38
Sales, maintenance and repair of motor cycles and related accessories	3 077	3 018	717	697	39	156	161	32
Retail sales of automotive fuel	147 097	145 141	1 885	2 405	2 476	4 338	4 561	537
<b>Total</b>	<b>521 179</b>	<b>514 488</b>	<b>42 178</b>	<b>50 038</b>	<b>14 551</b>	<b>34 019</b>	<b>33 552</b>	<b>9 658</b>

**Table 4 – Profit margin in the motor trade industry, 2012**

Type of motor trade	Net profit or loss after tax 2009	Net profit or loss after tax 2012	Turnover 2009	Turnover 2012	Profit margin <sup>1</sup> 2009	Profit margin <sup>1</sup> 2012
	R million				%	
Wholesale sales of motor vehicles	413	667	27 473	36 333	1,5	1,8
Retail sales of motor vehicles	6 160	5 325	188 052	250 851	3,3	2,1
Maintenance and repair of motor vehicles	519	628	19 182	24 632	2,7	2,5
Sales of new motor vehicle parts and accessories	752	1 685	34 369	50 236	2,2	3,4
Sales of used motor vehicle parts and accessories	98	108	1 982	2 293	4,9	4,7
Sales, maintenance and repair of motor cycles and related accessories	12	22	2 734	3 032	0,4	0,7
Retail sales of automotive fuel	264	1 875	97 832	146 535	0,3	1,3
<b>Total</b>	<b>8 218</b>	<b>10 310</b>	<b>371 624</b>	<b>513 912</b>	<b>2,2</b>	<b>2,0</b>

<sup>1</sup>Net profit after tax divided by turnover multiplied by 100.

**Table 5 – Income in the motor trade industry, 2009 and 2012**

Income item	R million		Contribution		Annualised % change
	2009	2012	2009	2012	
Sales	332 751	460 896	88,0	88,4	11,5
Services	36 787	47 465	9,7	9,1	8,9
Interest	2 071	1 616	0,5	0,3	-7,9
Rental, leasing and hiring	2 085	5 551	0,6	1,1	38,6
Other income	4 572	5 651	1,2	1,1	7,3
<b>Total</b>	<b>378 266</b>	<b>521 179</b>	<b>100</b>	<b>100</b>	<b>11,3</b>

**Table 6 – Income in the motor trade industry, 2012**

Type of motor trade	Sales	Services	Rental, leasing and hiring	Interest	Profit on sale or revaluation of assets	Other income	Total
	R million						
Wholesale sales of motor vehicles	35 698	621	14	148	11	518	<b>37 010</b>
Retail sales of motor vehicles	222 162	23 570	5 119	1 119	230	3 446	<b>255 646</b>
Maintenance and repair of motor vehicles	6 779	17 787	66	60	42	123	<b>24 857</b>
Sales of new motor vehicle parts and accessories	48 280	1 815	141	185	57	683	<b>51 161</b>
Sales of used motor vehicle parts and accessories	2 220	71	2	9	5	24	<b>2 331</b>
Sales, maintenance and repair of motor cycles and related accessories	2 874	157	1	8	5	32	<b>3 077</b>
Retail sales of automotive fuel	142 883	3 444	208	87	282	193	<b>147 097</b>
<b>Total</b>	<b>460 896</b>	<b>47 465</b>	<b>5 551</b>	<b>1 616</b>	<b>632</b>	<b>5 019</b>	<b>521 179</b>

**Table 7 – Income by enterprise size in the motor trade industry, 2012**

Type of motor trade	Large enterprises	Medium enterprises	Small and micro enterprises	Total
	R million			
Wholesale sales of motor vehicles	30 067	2 423	4 520	<b>37 010</b>
Retail sales of motor vehicles	224 348	14 333	16 965	<b>255 646</b>
Maintenance and repair of motor vehicles	3 274	3 031	18 552	<b>24 857</b>
Sales of new motor vehicle parts and accessories	24 253	7 011	19 897	<b>51 161</b>
Sales of used motor vehicle parts and accessories	524	580	1 227	<b>2 331</b>
Sales, maintenance and repair of motor cycles and related accessories	393	806	1 878	<b>3 077</b>
Retail sales of automotive fuel	36 283	54 118	56 696	<b>147 097</b>
<b>Total</b>	<b>319 142</b>	<b>82 302</b>	<b>119 735</b>	<b>521 179</b>



**Table 8 – Concentration ratios (relative contribution of large enterprises) in the motor trade industry, 2012**

Type of motor trade	Total Income	Income of the 5 largest enterprises	Relative contribution of the 5 largest enterprises	Income of the 10 largest enterprises	Relative contribution of the 10 largest enterprises	Income of the 20 largest enterprises	Relative contribution of the 20 largest enterprises
	R million		%	R million	%	R million	%
Wholesale sales of motor vehicles	37 010	16 018	43,3	21 120	57,1	26 257	70,9
Retail sales of motor vehicles	255 646	102 089	39,9	130 122	50,9	145 579	56,9
Maintenance and repair of motor vehicles	24 857	1 518	6,1	2 199	8,8	3 141	12,6
Sales of new motor vehicle parts and accessories	51 161	9 302	18,2	12 825	25,1	16 022	31,3
Sales of used motor vehicle parts and accessories	2 331	524	22,5	848	36,4	1 166	50,0
Sales, maintenance and repair of motor cycles and related accessories	3 077	550	17,9	865	28,1	1 183	38,4
Retail sales of automotive fuel	147 097	3 122	2,1	4 862	3,3	7 660	5,2
<b>Total</b>	<b>521 179</b>	<b>102 089<sup>2</sup></b>	<b>19,6<sup>3</sup></b>	<b>133 083<sup>2</sup></b>	<b>25,5<sup>3</sup></b>	<b>156 761<sup>2</sup></b>	<b>30,1<sup>3</sup></b>

<sup>2</sup> These figures reflect the income of the 5, 10 and 20 largest enterprises respectively, and not the column totals.

<sup>3</sup> Relative contribution=income of the largest enterprises divided by total income multiply by 100.

**Table 9 – Expenditure in the motor trade industry, 2009 and 2012**

Expenditure item	2009	2012	Contribution 2009	Contribution 2012	Annualised % change
	R million		%		
Purchases	306 570	424 970	83,4	82,6	11,5
Salaries and wages	24 712	38 298	6,7	7,4	15,7
Rental of land, buildings and other structures	4 024	6 261	1,1	1,2	15,9
Depreciation	2 945	3 544	0,8	0,7	6,4
Total subcontractors paid	1 013	3 456	0,3	0,7	50,5
Interest	4 981	3 145	1,4	0,6	-14,2
Motor vehicle running expenditure	1 860	2 135	0,5	0,4	4,7
Advertising	1 252	1 528	0,3	0,3	6,9
Provisions	107	1 389	0,0	0,3	135,0
Water and electricity	693	1 337	0,2	0,3	24,5
Insurance	1 103	1 267	0,3	0,2	4,7
Bank charges	768	1 143	0,2	0,2	14,2
Other	17 706	26 015	4,8	5,1	13,7
<b>Total</b>	<b>367 734</b>	<b>514 488</b>	<b>100,0</b>	<b>100,0</b>	<b>11,8</b>

**Table 10 – Expenditure in the motor trade industry, 2012**

Type of motor trade	Purchases	Salaries and wages	Rental of land, buildings and other structures	Depreciation	Total subcontractors paid	Interest	Motor vehicle running expenditure	Advertising	Provisions
	R million								
Wholesale sales of motor vehicles	31 453	1 454	284	82	41	208	64	401	293
Retail sales of motor vehicles	206 123	18 902	2 729	2 313	3 205	2 134	848	724	1 065
Maintenance and repair of motor vehicles	14 245	5 245	736	423	167	182	508	76	11
Sales of new motor vehicle parts and accessories	37 388	5 754	877	395	25	385	495	196	10
Sales of used motor vehicle parts and accessories	1 574	344	36	22	1	11	26	14	0
Sales, maintenance and repair of motor cycles and related accessories	2 307	320	56	22	1	18	25	31	3
Retail sales of automotive fuel	131 880	6 279	1 543	287	16	207	169	86	7
<b>Total</b>	<b>424 970</b>	<b>38 298</b>	<b>6 261</b>	<b>3 544</b>	<b>3 456</b>	<b>3 145</b>	<b>2 135</b>	<b>1 528</b>	<b>1 389</b>

**Table 10 – Expenditure in the motor trade industry, 2012 (concluded)**

Type of motor trade	Administration and management fees	Water and electricity	Insurance	Bank charges	Other	Total
	R million					
Wholesale sales of motor vehicles	184	31	54	45	2 788	37 382
Retail sales of motor vehicles	512	358	418	241	13 189	252 761
Maintenance and repair of motor vehicles	178	200	297	125	1 755	24 148
Sales of new motor vehicle parts and accessories	169	175	226	214	3 478	49 787
Sales of used motor vehicle parts and accessories	8	14	23	18	160	2 251
Sales, maintenance and repair of motor cycles and related accessories	33	16	20	17	149	3 018
Retail sales of automotive fuel	253	543	229	483	3 159	145 141
<b>Total</b>	<b>1 337</b>	<b>1 337</b>	<b>1 267</b>	<b>1 143</b>	<b>24 678</b>	<b>514 488</b>

**Table 11 – Carrying value of fixed assets at the end of the financial year in the motor trade industry, 2012**

Type of motor trade	Land, buildings and construction	Computer equipment and software	Motor vehicles and other transport equipment	Plant, machinery and equipment	Intangible assets	Other assets	Total carrying value of fixed assets
	R million						
Wholesale sales of motor vehicles	327	14	77	99	149	9	<b>675</b>
Retail sales of motor vehicles	7 542	168	5 380	1 763	6 227	90	<b>21 170</b>
Maintenance and repair of motor vehicles	967	35	944	845	181	94	<b>3 066</b>
Sales of new motor vehicle parts and accessories	1 153	70	643	1 269	551	18	<b>3 704</b>
Sales of used motor vehicle parts and accessories	121	2	50	21	17	4	<b>215</b>
Sales, maintenance and repair of motor cycles and related accessories	69	3	46	23	19	1	<b>161</b>
Retail sales of automotive fuel	1 385	39	359	587	2 157	34	<b>4 561</b>
<b>Total</b>	<b>11 564</b>	<b>331</b>	<b>7 499</b>	<b>4 607</b>	<b>9 301</b>	<b>250</b>	<b>33 552</b>

**Table 12 – Details of assets in the motor trade industry, 2012**

Type of motor trade	Current assets					Non-current assets					Total assets
	Bank	Debtors	Inventory	Other	Total	Fixed	Goodwill	Long-term investment	Other	Total	
	R million										
Wholesale sales of motor vehicles	2 200	2 951	7 236	373	<b>12 760</b>	554	122	136	484	<b>1 296</b>	<b>14 056</b>
Retail sales of motor vehicles	6 011	12 393	30 518	12 399	<b>61 321</b>	16 652	4 518	2 313	6 271	<b>29 754</b>	<b>91 075</b>
Maintenance and repair of motor vehicles	956	2 220	1 457	482	<b>5 115</b>	2 890	177	155	704	<b>3 926</b>	<b>9 041</b>
Sales of new motor vehicle parts and accessories	2 305	5 566	7 414	1 176	<b>16 461</b>	3 164	540	466	1 396	<b>5 566</b>	<b>22 027</b>
Sales of used motor vehicle parts and accessories	179	117	311	45	<b>652</b>	201	14	44	49	<b>308</b>	<b>960</b>
Sales, maintenance and repair of motor cycles and related accessories	176	139	697	105	<b>1 117</b>	146	15	37	107	<b>305</b>	<b>1 422</b>
Retail sales of automotive fuel	2 136	1 976	2 405	785	<b>7 302</b>	2 423	2 138	605	1 076	<b>6 242</b>	<b>13 544</b>
<b>Total</b>	<b>13 963</b>	<b>25 362</b>	<b>50 038</b>	<b>15 365</b>	<b>104 728</b>	<b>26 030</b>	<b>7 524</b>	<b>3 756</b>	<b>10 087</b>	<b>47 397</b>	<b>152 125</b>

**Table 13 – Details of liabilities and owners’ equity in the motor trade industry, 2012**

Type of motor trade	Current liabilities				Non-current liabilities			Total liabilities	Owners' equity	Liabilities and owners' equity
	Creditors	Overdraft	Other	Total	Long-term loans	Other	Total			
	R million									
Wholesale sales of motor vehicles	5 940	416	1 626	<b>7 982</b>	818	986	<b>1 804</b>	9 786	4 270	<b>14 056</b>
Retail sales of motor vehicles	27 524	1 971	14 722	<b>44 217</b>	8 791	16 887	<b>25 678</b>	69 895	21 180	<b>91 075</b>
Maintenance and repair of motor vehicles	2 301	397	617	<b>3 315</b>	1 411	1 486	<b>2 897</b>	6 212	2 829	<b>9 041</b>
Sales of new motor vehicle parts and accessories	6 986	835	1 939	<b>9 760</b>	3 639	1 358	<b>4 997</b>	14 757	7 270	<b>22 027</b>
Sales of used motor vehicle parts and accessories	204	60	42	<b>306</b>	204	81	<b>285</b>	591	369	<b>960</b>
Sales, maintenance and repair of motor cycles and related accessories	416	47	115	<b>578</b>	311	66	<b>377</b>	955	467	<b>1 422</b>
Retail sales of automotive fuel	2 494	429	768	<b>3 691</b>	2 173	1 547	<b>3 720</b>	7 411	6 133	<b>13 544</b>
<b>Total</b>	<b>45 865</b>	<b>4 155</b>	<b>19 829</b>	<b>69 849</b>	<b>17 347</b>	<b>22 411</b>	<b>39 758</b>	<b>109 607</b>	<b>42 518</b>	<b>152 125</b>

**Table 14 – Capital expenditure on new assets in the motor trade industry, 2009 and 2012**

Asset	R million		Contribution		Annualised % change
	2009	2012	2009	2012	
Land, buildings and construction	1 396	1 111	21,5	11,5	-7,3
Computer equipment and software	165	156	2,5	1,6	-1,9
Motor vehicles and other transport equipment	3 164	6 905	48,8	71,5	29,7
Plant, machinery and other office equipment	1 158	1 146	17,9	11,9	-0,3
Other assets	602	340	9,3	3,5	-17,3
<b>Total</b>	<b>6 485</b>	<b>9 658</b>	<b>100,0</b>	<b>100,0</b>	<b>14,2</b>

**Table 15 – Capital expenditure on new assets in the motor trade industry, 2012**

Type of motor trade	Land, buildings and construction	Computer equipment and software	Motor vehicles and other transport equipment	Plant, machinery and other office equipment	Other assets	Total
	R million					
Wholesale sales of motor vehicles	34	6	43	23	6	<b>112</b>
Retail sales of motor vehicles	778	109	6 122	630	232	<b>7 871</b>
Maintenance and repair of motor vehicles	37	11	326	152	66	<b>592</b>
Sales of new motor vehicle parts and accessories	62	19	260	129	6	<b>476</b>
Sales of used motor vehicle parts and accessories	12	1	18	6	1	<b>38</b>
Sales, maintenance and repair of motor cycles and related accessories	0	1	27	4	0	<b>32</b>
Retail sales of automotive fuel	188	9	109	202	29	<b>537</b>
<b>Total</b>	<b>1 111</b>	<b>156</b>	<b>6 905</b>	<b>1 146</b>	<b>340</b>	<b>9 658</b>



**Table 16 – Employment in the motor trade industry as at the end of June, 2009 and 2012**

Type of motor trade	Female employees			Male employees			Total employees		
	2009	2012	Annualised % change	2009	2012	Annualised % change	2009	2012	Annualised % change
	Number of employees								
Wholesale sales of motor vehicles	2 884	2 939	0,6	6 395	6 418	0,1	9 279	9 357	0,3
Retail sales of motor vehicles	27 142	24 791	-3,0	55 673	66 918	6,3	82 815	91 709	3,5
Maintenance and repair of motor vehicles	10 571	10 711	0,4	39 157	37 968	-1,0	49 729	48 679	-0,7
Sales of new motor vehicle parts and accessories	8 987	11 185	7,6	30 320	34 188	4,1	39 307	45 373	4,9
Sales of used motor vehicle parts and accessories	673	469	-11,3	2 898	2 455	-5,4	3 571	2 924	-6,4
Sales, maintenance and repair of motor cycles and related accessories	424	599	12,2	1 433	1 759	7,1	1 857	2 358	8,3
Retail sales of automotive fuel	21 648	25 607	5,8	50 171	58 643	5,3	71 819	84 250	5,5
<b>Total</b>	<b>72 329</b>	<b>76 301</b>	<b>1,8</b>	<b>186 047</b>	<b>208 349</b>	<b>3,8</b>	<b>258 377</b>	<b>284 650</b>	<b>3,3</b>

**Table 17 – Employment in the motor trade industry as at the end of June, 2012**

Type of motor trade	Working proprietors			Permanent employees			Temporary employees			Casual employees			Total employees
	Female	Male	Total	Female	Male	Total	Female	Male	Total	Female	Male	Total	
	Number of employees												
Wholesale sales of motor vehicles	40	303	343	2 871	5 947	8 818	18	126	144	10	42	52	9 357
Retail sales of motor vehicles	357	1 635	1 992	23 860	63 842	87 702	388	671	1 059	186	770	956	91 709
Maintenance and repair of motor vehicles	658	2 610	3 268	9 712	33 608	43 320	192	1 243	1 435	149	507	656	48 679
Sales of new motor vehicle parts and accessories	318	951	1 269	9 696	31 296	40 992	1 077	1 644	2 721	94	297	391	45 373
Sales of used motor vehicle parts and accessories	13	89	102	454	2 147	2 601	2	23	25	0	196	196	2 924
Sales, maintenance and repair of motor cycles and related accessories	4	161	165	579	1 480	2 059	9	102	111	7	16	23	2 358
Retail sales of automotive fuel	1 149	2 665	3 814	23 821	54 305	78 126	241	626	867	396	1 047	1 443	84 250
<b>Total</b>	<b>2 539</b>	<b>8 414</b>	<b>10 953</b>	<b>70 993</b>	<b>192 625</b>	<b>263 618</b>	<b>1 927</b>	<b>4 435</b>	<b>6 362</b>	<b>842</b>	<b>2 875</b>	<b>3 717</b>	<b>284 650</b>

**Table 18 – Employment by enterprise size in the motor trade industry, 2012**

Type of motor trade	Large enterprises	Medium enterprises	Small and micro enterprises	Total
	Number of employees			
Wholesale sales of motor vehicles	3 027	533	5 797	9 357
Retail sales of motor vehicles	75 713	5 396	10 600	91 709
Maintenance and repair of motor vehicles	2 372	3 531	42 776	48 679
Sales of new motor vehicle parts and accessories	16 914	4 651	23 808	45 373
Sales of used motor vehicle parts and accessories	285	441	2 198	2 924
Sales, maintenance and repair of motor cycles and related accessories	126	325	1 907	2 358
Retail sales of automotive fuel	17 694	28 251	38 305	84 250
<b>Total</b>	<b>116 131</b>	<b>43 128</b>	<b>125 391</b>	<b>284 650</b>

**Table 19 – Details of sales by commodity in the motor trade industry, 2012**

Commodity type	R million		% contribution to total sales		Annualised % change
	2009	2012	2009	2012	
<b>New vehicles</b>					
Cars	79 973	99 523	24,1	21,6	7,6
Minibuses	11 312	8 530	3,4	1,9	-9,0
Vans	14 769	17 018	4,4	3,7	4,8
Trucks and lorries	8 824	14 570	2,7	3,2	18,2
Other	5 400	4 734	1,6	1,0	-4,3
<b>Total new vehicles</b>	<b>120 278</b>	<b>144 375</b>	<b>36,2</b>	<b>31,4</b>	<b>6,3</b>
<b>Used vehicles</b>					
Cars	46 792	72 375	14,0	15,7	15,6
Minibuses	2 018	1 740	0,6	0,4	-4,8
Vans	4 991	5 915	1,5	1,3	5,8
Trucks and lorries	4 675	3 863	1,4	0,8	-6,2
Other	2 175	3 270	0,7	0,7	14,6
<b>Total used vehicles</b>	<b>60 651</b>	<b>87 163</b>	<b>18,2</b>	<b>18,9</b>	<b>12,8</b>

**Table 19 – Details of sales by commodity in the motor trade industry, 2012 (concluded)**

Commodity type	R million		% contribution to total sales		Annualised % change
	2009	2012	2009	2012	
<b>Tyres, parts and accessories</b>					
New tyres	12 126	21 544	3,6	4,7	21,1
New parts and accessories	35 899	52 511	10,8	11,4	13,5
Used tyres	1 643	1 091	0,5	0,2	-12,8
Used parts and accessories	3 342	5 083	1,0	1,1	15,0
<b>Total tyres, parts and accessories</b>	<b>53 010</b>	<b>80 229</b>	<b>15,9</b>	<b>17,4</b>	<b>14,8</b>
<b>Fuel</b>					
Petrol	61 526	86 808	18,5	18,8	12,2
Diesel	22 220	38 753	6,7	8,4	20,4
<b>Total fuel</b>	<b>83 746</b>	<b>125 561</b>	<b>25,2</b>	<b>27,2</b>	<b>14,5</b>
All other sales	15 066	23 568	4,5	5,1	16,1
<b>Total sales</b>	<b>332 751</b>	<b>460 896</b>	<b>100,0</b>	<b>100,0</b>	<b>11,5</b>

**Table 20 – Details of services in the motor trade industry, 2012**

Service type	2009	2012	Contribution 2009	Contribution 2012	Annualised change
	R million		%		
Mechanical repairs	5 560	6 949	15,1	14,6	7,7
Electrical repairs and electronic injection	1 600	1 364	4,3	2,9	-5,2
Panel-beating and spray painting	8 975	13 799	24,4	29,1	15,4
Exhaust system fitment and repair	331	310	0,9	0,7	-2,2
Tyre and tube fitment and repair	1 060	994	2,9	2,1	-2,1
Wheel balancing and alignment	575	377	1,6	0,8	-13,1
Towing and roadside assistance	556	686	1,5	1,4	7,3
Installing of parts and accessories	1 121	1 107	3,0	2,3	-0,4
Other services	17 006	21 874	46,2	46,1	8,8
<b>Total</b>	<b>36 787</b>	<b>47 465</b>	<b>100,0</b>	<b>100,0</b>	<b>8,9</b>

**Table 21 – Details of purchases by commodity in the motor trade industry, 2012**

Commodity type	R million		% contribution to total purchases		Annualised % change
	2009	2012	2009	2012	
<b>New Vehicles</b>					
Cars	69 669	94 556	22,5	22,2	10,7
Vans	14 589	15 514	4,8	3,7	2,1
Trucks and lorries	8 906	13 336	2,9	3,1	14,4
Other	16 466	8 028	5,4	1,9	-21,3
<b>Total new vehicles</b>	<b>109 630</b>	<b>131 434</b>	<b>35,6</b>	<b>30,9</b>	<b>6,2</b>
<b>Used Vehicles</b>					
Cars	40 532	56 702	13,3	13,4	11,8
Vans	4 392	5 534	1,4	1,3	8,0
Trucks and lorries	3 654	3 516	1,2	0,8	-1,3
Other	3 709	4 342	1,2	1,0	5,4
<b>Total used vehicles</b>	<b>52 287</b>	<b>70 094</b>	<b>17,1</b>	<b>16,5</b>	<b>10,3</b>

**Table 21 – Details of purchases by commodity in the motor trade industry, 2012 (concluded)**

Commodity type	R million		% contribution to total sales		Annualised % change
	2009	2012	2009	2012	
<b>Tyres</b>					
New tyres	10 791	17 801	3,5	4,2	18,2
New parts and accessories	37 539	52 405	12,3	12,4	11,8
Used tyres, parts and accessories	4 569	5 661	1,5	1,3	7,4
<b>Total tyres</b>	<b>52 899</b>	<b>75 867</b>	<b>17,3</b>	<b>17,9</b>	<b>12,8</b>
<b>Fuel</b>					
Petrol	56 860	79 310	18,6	18,7	11,7
Diesel	21 182	35 819	6,9	8,4	19,1
<b>Total fuel</b>	<b>78 042</b>	<b>115 129</b>	<b>25,5</b>	<b>27,1</b>	<b>13,8</b>
All other purchases	13 712	32 446	4,5	7,6	33,3
<b>Total purchases</b>	<b>306 570</b>	<b>424 970</b>	<b>100,0</b>	<b>100,0</b>	<b>11,5</b>



**Table 22 – Income from sales of goods and services by client base in the motor trade industry, 2009 and 2012**

Client	R million		% contribution to total sales of goods and services rendered		Annualised % change
	2009	2012	2009	2012	
Individuals and households	222 521	336 636	60,2	66,2	14,8
Businesses (including parastatals)	142 245	156 112	38,5	30,7	3,1
Government	4 772	15 613	1,3	3,1	48,5
<b>Total</b>	<b>369 538</b>	<b>508 361</b>	<b>100,0</b>	<b>100,0</b>	<b>11,2</b>

**Table 23 – Client base in the motor trade industry, 2012**

Type of motor trade	Individuals and households	Businesses (including parastatals)	Government	Total
	R million			
Wholesale sales of motor vehicles	13 362	22 655	302	<b>36 319</b>
Retail sales of motor vehicles	179 511	58 324	7 897	<b>245 732</b>
Maintenance and repair of motor vehicles	10 600	13 350	616	<b>24 566</b>
Sales of new motor vehicle parts and accessories	22 430	26 077	1 588	<b>50 095</b>
Sales of used motor vehicle parts and accessories	1 423	856	12	<b>2 291</b>
Sales, maintenance and repair of motor cycles and related accessories	2 093	918	20	<b>3 031</b>
Retail sales of automotive fuel	107 217	33 932	5 178	<b>146 327</b>
<b>Total</b>	<b>336 636</b>	<b>156 112</b>	<b>15 613</b>	<b>508 361</b>

**Table 24 – Information and communication technology usage by industry in the motor trade industry, 2012**

Type of motor trade	Use computer	Use internet	Use internet banking	Have web page	Receive orders over internet	Place orders over internet	IT outsourced
	% of enterprises						
Wholesale sales of motor vehicles	98,3	98,3	69,0	19,8	14,3	14,9	50,2
Retail sales of motor vehicles	99,9	99,9	85,5	42,6	21,5	22,4	49,3
Maintenance and repair of motor vehicles	99,4	99,4	90,2	21,1	32,7	29,3	41,8
Sales of new motor vehicle parts and accessories	98,0	98,0	81,3	24,2	30,5	34,5	51,8
Sales of used motor vehicle parts and accessories	100,0	100,0	95,8	40,6	19,6	25,2	63,6
Sales, maintenance and repair of motor cycles and related accessories	100,0	100,0	98,4	47,9	33,9	38,0	35,9
Retail sales of automotive fuel	99,5	99,5	85,8	4,2	8,8	26,4	38,3
<b>Total</b>	<b>99,2</b>	<b>99,2</b>	<b>85,4</b>	<b>20,8</b>	<b>21,8</b>	<b>27,6</b>	<b>44,6</b>

**Table 25 – Information and communication technology usage by size group in the motor trade industry, 2012**

Enterprise size	Use computer	Use internet	Use internet banking	Have web page	Receive orders over internet	Place orders over internet	IT outsourced
	% of enterprises						
Large enterprises	99,9	99,9	94,9	45,5	26,6	37,1	54,2
Medium enterprises	100,0	100,0	92,2	26,2	19,3	32,4	48,6
Small enterprises	99,0	99,0	86,6	23,3	19,0	29,5	44,7
Micro enterprises	99,0	99,0	81,3	13,9	24,0	23,6	41,9
<b>Total</b>	<b>99,2</b>	<b>99,2</b>	<b>85,4</b>	<b>20,8</b>	<b>21,8</b>	<b>27,6</b>	<b>44,6</b>

## Explanatory notes

<b>Background</b>	<p>The results presented in this publication have been derived from the 2012 motor trade large sample survey. This is a periodic survey which measures economic activity in the motor trade sector of the South African economy. This survey is based on a sample of private and public enterprises operating in wholesale trade industries.</p> <p>The sample was drawn from Stats SA's business register, based on the units registered for value added tax (VAT).</p>
<b>Value added tax (VAT)</b>	<p>All figures exclude value added tax (VAT).</p>
<b>Reference period</b>	<p>The information was collected from enterprises for their financial year, which ended on any date between 1 July 2011 and 30 June 2012.</p>
<b>Purpose of the survey</b>	<p>Results of the survey are used within Stats SA for compiling the gross domestic product (GDP) and its components. These statistics are also used by government policy advisors in monitoring the performance and contribution of individual industries to the South African economy and the effectiveness of industry policies, and by private sector users in analyses of comparative business and industry performance.</p>
<b>Classification by industry</b>	<p>The 1993 edition of the <i>Standard Industrial Classification of all Economic Activities</i> (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 <i>International Standard Industrial Classification of all Economic Activities</i> (ISIC) with suitable adaptations for local conditions. Statistics in this publication are presented at SIC group (five-digit) level. Each enterprise is classified to an industry, which reflects its predominant activity.</p>
<b>Statistical unit</b>	<p>The statistical unit for the collection of the 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 production activities.</p>

**Size groups**

The enterprises are divided into four size groups according to the value of turnover recorded for them on the Stats SA business register. Large enterprises are those with an annual recorded turnover of R78 million and above. Table 26 presents the size groups defined using the Department of Trade and Industry (DTI) cut-off points multiplied by two.

**Table 26 – Size groups for the motor trade industry**

Size group	Turnover
Large	≥ R78 000 000
Medium	R38 000 000 ≤ VAT turnover < R78 000 000
Small	R8 000 000 ≤ VAT turnover < R38 000 000
Micro	< R8 000 000

**Survey methodology and design**

The survey was conducted by post, email, fax, telephone and personal visits.

A sample of approximately 2 000 enterprises was drawn using stratified simple random sampling. The enterprises were first stratified at the five-digit level according to the SIC and then by size of enterprise. All large enterprises were completely enumerated. Turnover as recorded on the business register was used as the measure of size for stratification. The collection rate was 80,1%.

**Collection rate**

Collection rate = ((collected + finalised investigations)/ sample size) x 100

**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 were calculated and then aggregated with the completely enumerated stratum to form division estimates.

**Revisions to 2009 results**

Revisions were made to 2009 results due to new information obtained after the publication.

**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 wholesale 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 as a result of sampling, and thus avoids the need to refer to the size of the estimate.

**Table 27 – Income in the motor trade industry within 95% confidence limits, 2012**

Type of motor trade	Lower limit	Total income	Upper limit	Relative Standard error
	R million			%
Wholesale sales of motor vehicles	36 285	37 010	37 735	1,0
Retail sales of motor vehicles	252 139	255 646	259 153	0,7
Maintenance and repairs of motor vehicles	23 883	24 857	25 831	2,0
Sales of new motor vehicle parts and accessories	49 557	51 161	52 765	1,6
Sales of used motor vehicle parts and accessories	2 189	2 331	2 473	3,1
Sales, maintenance and repair of motor cycles and related accessories	2 866	3 077	3 288	3,5
Retail sale of automotive fuel	140 178	147 097	154 016	2,4
<b>Total</b>	<b>513 007</b>	<b>521 179</b>	<b>529 351</b>	<b>0,8</b>

**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 of figures** The figures in the tables have, where necessary, been rounded to the nearest final digit shown. There may therefore be slight discrepancies between the sums of the constituent items of the totals shown.

**Abbreviations**

BR	Business Register
DTI	Department of Trade and Industry
GDP	Gross domestic product
ISIC	International Standard Industrial Classification of All Economic Activities
IT	Income tax
RSE	Relative standard error
SARS	South African Revenue Service
SE	Standard error
SIC	Standard Industrial Classification of all Economic Activities
SNA	System of National Accounts
Stats SA	Statistics South Africa
VAT	Value added tax

## Glossary

<b>Casual employees</b>	Casual employees are employees who are typically working daily or hourly, whose services can be dispensed with at a very short notice, usually not exceeding a period of one week, and who are not entitled to benefits such as paid leave and medical aid contributions paid by employers.
<b>Current assets</b>	Assets on the balance sheet which are expected to be sold or otherwise used up in the near future, usually within one year. They include: <ul style="list-style-type: none"><li>• trade and other receivables;</li><li>• cash and bank;</li><li>• inventories; and</li><li>• other current assets.</li></ul>
<b>Current liabilities</b>	Current liabilities are debts or obligations that are due within one year. 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>Enterprise</b>	The enterprise is a legal entity or a combination of legal units that includes and directly controls all functions necessary to carry out its activities.
<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</i> (SNA) in the same way as in the Standard Industrial Classification of all Economic Activities, Fifth Edition, Report No. 09-90-02 of January 1993 (SIC).
<b>Intangible assets</b>	Intangible assets include: <ul style="list-style-type: none"><li>• computer software and databases;</li><li>• mineral exploration and evaluation;</li><li>• patent rights and trademarks;</li><li>• goodwill and marketing assets;</li><li>• research and development;</li><li>• entertainment, literary and artistic originals;</li><li>• contracts, leases and licences; and</li><li>• other intellectual products.</li></ul>
<b>Labour brokers</b>	Agents who recruit and administer workers on behalf of the enterprise. They do not provide any other service.
<b>Motor vehicles and other transport equipment</b>	Includes: motor vehicles, trucks, aircraft, boats, trailers, locomotives and other transport equipment.



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<b>Net profit or loss after tax</b>	<p>Net profit or loss after tax is derived as:</p> <p>Total income <b>plus</b> closing value of inventories <b>minus</b> total expenditure <b>minus</b> opening value of inventories <b>minus</b> company tax</p>
<b>Net profit or loss before tax</b>	<p>Net profit or loss before tax is derived as:</p> <p>Total income <b>plus</b> closing value of inventories <b>minus</b> total expenditure <b>minus</b> opening value of inventories</p>
<b>Non-current assets</b>	<p>Non-current assets are assets which are not easily convertible to cash or not expected to become cash within the next year. They include:</p> <ul style="list-style-type: none"><li>• property, plant and equipment and intangible assets;</li><li>• long-term investments; and</li><li>• other non-current assets.</li></ul>
<b>Non-current liabilities</b>	<p>Non-current liabilities are liabilities not due to be paid within one year during the normal course of business. They include:</p> <ul style="list-style-type: none"><li>• long-term loans; and</li><li>• other non-current liabilities.</li></ul>

**Other expenditure**

Other expenditure includes:

- accommodation;
- administration fees;
- amortisation;
- bank charges;
- bursaries;
- computers and other IT expenditure;
- containers and packaging materials;
- entertainment;
- excise and customs duty;
- insurance;
- losses on liabilities;
- losses on foreign exchange;
- mineral rights leases;
- motor vehicle running expenditure;
- paper, printing and stationery;
- property tax;
- provisions;
- railage and transport-out;
- research and development;
- road tolls;
- royalties;
- security services (including IT security services);
- severance, termination and redundancy payments;
- skills development levy;
- staff training;
- subscriptions;
- telecommunication services;
- travelling;
- donations, sponsorships and social investment; and
- other expenditure.

**Other income**

Other income includes:

- capital transfers received;
- mineral rights leases;
- profit for redemption, liquidation or revaluation of liabilities;
- profit on foreign exchange as a result of variations in foreign exchange rates;
- provisions;
- royalties;
- income received by an agent to be paid to another party for services rendered by that party;
- excise and customs duty received by an agent to be paid to the relevant authority on behalf of a client; and
- other income.

**Owners' equity**

Owners' equity is the residual interest in the entity's assets after deducting its liabilities.

**Permanent employees**

Permanent employees are employees appointed on an open-ended contract with no stipulated termination date or a fixed-term contract for periods of more than one year

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<b>Profit margin</b>	Profit margin is derived as:  Net profit after tax <b><i>divided by</i></b> turnover <b><i>multiplied by</i></b> 100
<b>Statistical unit</b>	A statistical unit is a unit of observation or measurement for which statistical data are collected or derived.
<b>Stratum</b>	A stratum is constructed by concatenating the SIC classification and size group variables.
<b>Temporary employees</b>	Temporary employees are employees appointed on a short-term contract basis with a stipulated termination date for periods not exceeding one year.
<b>Turnover</b>	Turnover includes: <ul style="list-style-type: none"><li>• value of sales of goods;</li><li>• amount received for services rendered;</li><li>• rent and lease payments received for land and buildings; and</li><li>• rent, leasing and hiring received for machinery, vehicles and other equipment.</li></ul>

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