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Contents

1.	Introduction	1
1.1	Scope and coverage	1
1.2	Data items	1
1.3	Reference period	1
1.4	Current prices	1
1.5	Reliability of data	2
1.6	Confidentiality	2
1.7	Reporting unit	2
2.	Summary of findings	3
Tabl	le A – Selected financial statistics in the ocean (marine) fisheries and related services industry, 2014–2017	3
Tabl	le B – Concentration ratio for total income in the ocean (marine) fisheries and related services industry, 2014–2017	4
Tabl	le C – Profit margin in the ocean (marine) fisheries and related services industry, 2014–2017	5
Tabl	le D – Employment at the end of June in the ocean (marine) fisheries and related services industry, 2014–2017	6
Tabl	le E – Average salaries and wages in the ocean (marine) fisheries and related services industry, 2014–2017	7
Tabl	le F - Sales and transfers-out of own-caught fish and other fish products in the ocean (marine) fisheries and related services industry, 2014–2017	
Tabl	le G – Sales and transfers-out of processed fish in the ocean (marine) fisheries and related services industry, 2014–2017	9
3.	Tables	10
Tabl	le 1 – Principal statistics in the ocean (marine) fisheries and related services industry, 2015 and 2017	10
Tabl	le 2 – Details of income in the ocean (marine) fisheries and related services industry, 2015 and 2017	11
Tabl	le 3 – Details of expenditure in the ocean (marine) fisheries and related services industry, 2015 and 2017	12
Tabl	le 4 – Details of assets, owners' equity and liabilities in the ocean (marine) fisheries and related services industry, 2015 and 2017	13
Tabl	le 5 – Capital expenditure on new assets in the ocean (marine) fisheries and related services industry, 2015 and 2017	14
Tabl	le 6 – Carrying value of assets at the end of the financial year in the ocean (marine) fisheries and related services industry, 2015 and 2017	15
Tabl	le 7 – Details of employees in the ocean (marine) fisheries and related services industry, 2015 and 2017	16
Tabl	le 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	y, 2015 and
201	7	17
Tabl	le 9 - Details of income from services in the ocean (marine) fisheries and related services industry, 2015 and 2017	18
Tabl	le 10 – Details of purchases in the ocean (marine) fisheries and related services industry, 2015 and 2017	19
	le 11 – Fishing vessels and fishing equipment in the ocean (marine) fisheries and related services industry, 2015 and 2017	
Expl	lanatory notes	21
Glos	ssary	23
Gen	eral information	25

1. Introduction

This publication presents estimates in respect of the 2017 ocean (marine) fisheries and related services industry census. 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 2017.

The last ocean (marine) fisheries and related services industry census was conducted in 2015 (Discussion Document 1300 (2015)).

1.1 Scope and coverage

The 2017 ocean (marine) fisheries and related services industry census 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, details of employment, trading income, expenditure, profit or loss, inventories, capital expenditure on new assets, details of services rendered, details of purchases, details of 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 which ends 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.

Example, for 2017

- 1 October 2015 30 September 2016
- 1 January 2016 31 December 2016
- 1 February 2016 31 January 2017
- 1 March 2016 28 February 2017
- 1 April 2016 31 March 2017

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, 2014–2017

	Total income	Net profit before tax	Capital expenditure on new assets				
		R'000					
2014	9 630 651	1 016 130	462 072				
2015	11 847 899	1 677 888	559 720				
2017	15 793 255	2 076 787	574 595				
% change (2014 and 2015)	23,0	65,1	21,1				
Annualised % change (2015 and 2017)	15,5	11,3	1,3				

The total income in the ocean (marine) fisheries and related services industry in 2017 was R15,8 billion. The figure represents an annualised percentage increase of 15,5% over the total income reported in 2015 (R11,8 billion).

There was an annualised increase of 11,3% in net profit from R1,7 billion in 2015 to R2,1 billion in 2017. Capital expenditure increased by an annualised 1,3% from R559,7 million in 2015 to R574,6 million in 2017.

Table B - Concentration ratio for total income in the ocean (marine) fisheries and related services industry, 2014-2017

Concentration ratio	2014	2015	2017				
Concentration ratio	%						
CR5	70,1	65,0	63,8				
CR10	79,9	74,7	74,7				
CR20	85,9	82,6	84,1				
CR50	92,1	90,2	91,2				
CR100	95,5	94,6	94,9				

In 2017, the top 10 enterprises in the ocean (marine) fisheries and related services industry contributed 74,7% to the total income. The concentration ratio of the top 5, 10, 20, 50 and 100 enterprises in the three periods were the highest in 2014 at 70,1%, 79,9%, 85,9%, 92,1% and 95,5%, respectively. The concentration ratio of the top 5 enterprises was the lowest in 2017 at 63,8%,

Table C - Profit margin in the ocean (marine) fisheries and related services industry, 2014-2017

		2014	2015	2017
Net profit after tax	R'000	762 813	1 227 422	1 616 000
Turnover	R'000	8 980 340	10 904 078	14 692 452
Profit margin	%	8,5	11,3	11,0

The profit margin for the ocean (marine) fisheries and related services industry was 11,0% in 2017. In the three years in Table C, the ocean (marine) fisheries and related services industry recorded a highest profit margin of 11,3% in 2015.

Table D – Employment at the end of June in the ocean (marine) fisheries and related services industry, 2014–2017

. ,	2014		20	15	2017	
	number	% contribution	number	% contribution	number	% contribution
Permanent and working proprietors (paid and non-paid)	9 889	69,6	12 604	77,9	12 815	76,4
Temporary and casual/seasonal	4 315	30,4	3 586	22,1	3 958	23,6
Total	14 204	100,0	16 190	100,0	16 773	100,0

The number of persons employed in the ocean (marine) fisheries and related services industry in 2017 was 16 773. This represents an increase of 2 569 (or 18,1%) compared with 2014. The largest type of employment was 'permanent and working proprietors (paid and non-paid)' with 12 815 employees (or 76,4%).

Table E – Average salaries and wages in the ocean (marine) fisheries and related services industry, 2014–2017

	Salaries and wages	Total employees	Average salaries and wages
	R'000	Number	Rands
2014	1 605 148	14 204	113 007
2015	1 876 454	16 190	115 902
2017	2 579 858	16 773	153 810

The average salaries and wages in the ocean (marine) fisheries and related services industry in 2017 was R153 810, which was 32,7% higher than the average in 2015.

Table F – Sales and transfers-out of own-caught fish and other fish products in the ocean (marine) fisheries and related services industry, 2014–2017

	2014		201	5	2017		
	R'000	% contribution	R'000	% contribution	R'000	% contribution	
Hake	705 053	30,9	893 274	29,7	1 142 831	28,4	
Squid	320 665	14,1	501 530	16,7	725 506	18,0	
Pilchard/sardine	125 563	5,5	201 550	6,7	280 128	6,9	
Anchovy	168 785	7,4	277 167	9,2	350 222	8,7	
South coast rock lobster	149 528	6,6	163 891	5,4	171 749	4,3	
West coast rock lobster	216 817	9,5	254 119	8,4	388 816	9,6	
Tuna, albacore	32 059	1,4	62 069	2,1	80 899	2,0	
Kingklip	65 623	2,9	61 704	2,1	70 429	1,7	
Other own-caught fish and other fish products	494 740	21,7	592 716	19,7	823 679	20,4	
Total sales and transfers- out of own-caught fish	2 278 833	100,0	3 008 020	100,0	4 034 259	100,0	

The total sales and transfers-out of own-caught fish and other fish products increased by 15,8% per annum (from R3,0 billion in 2015 to R4,0 billion in 2017). Comparing 2015 and 2017, the largest increases were reported for 'hake' (+R249,6 million), 'squid' (+R224,0 million) and 'West coast rock lobster' (+R134,7 million).

'Hake' sales remained the largest contributor to the total sales and transfers-out of own-caught fish and other fish products (30,9% in 2014, 29,7% in 2015 and 28,4% in 2017), followed by 'squid' (14,1% in 2014, 16,7% in 2015 and 18,0% in 2017). 'Kingklip' was the lowest contributor in 2015 (2,1%) and 2017 (1,7%).

Table G - Sales and transfers-out of processed fish in the ocean (marine) fisheries and related services industry, 2014-2017

	2014		2	015	2017	
	R'000	% contribution	R'000	% contribution	R'000	% contribution
Hake, whole or cuts (e.g. steaks), frozen	1 678 805	25,6	1 995 866	27,4	2 442 677	24,8
Other white fish, whole or cuts, frozen	153 342	2,4	143 669	2,0	172 156	1,8
Fish (including fillets), smoked	42 236	0,6	58 957	0,8	79 835	0,8
Fish, canned	2 650 538	40,5	3 069 670	42,1	4 547 385	46,2
Fish cakes	48 756	0,7	45 898	0,6	55 805	0,6
Fish fingers	234 962	3,6	223 690	3,1	272 942	2,8
Other processed fish	1 737 878	26,5	1 753 081	24,0	2 263 930	23,0
Total sales and transfers-out of processed fish	6 546 517	100,0	7 290 831	100,0	9 834 730	100,0

The total sales and transfers-out of processed fish and other sales in the ocean (marine) fisheries and related services industry in 2017 was R9,8 billion. This represents an annualised increase of 16,1% from R7,3 billion in 2015. The largest increases were reported for 'fish, canned' (+R1,5 billion) and 'hake, whole or cuts (e.g. steaks), frozen' (+R446,8 million). 'Fish, canned' sales remained the largest contributor to the total sales and transfers-out of processed fish and other sales (40,5% in 2014, 42,1% in 2015 and 46,2% in 2017).

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3. **Tables**

Table 1 – Principal statistics in the ocean (marine) fisheries and related services industry, 2015 and 2017

	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 new assets	Number of employees
	R'000								
2015 ¹	11 847 899	9 895 825	1 824 957	1 550 773	1 677 890	2 332 559	2 530 582	559 720	16 190
2017 ²	15 793 255	13 940 757	1 586 150	1 810 439	2 076 787	3 228 717	3 339 538	574 595	16 773
Annualised % change	15,5	18,7	-6,8	8,0	11,3	17,7	14,9	1,3	1,8

Revised figures.Preliminary figures.

Table 2 – Details of income in the ocean (marine) fisheries and related services industry, 2015 and 2017

	2015 ¹		20	Annualised	
	R'000	% contribution	R'000	% contribution	% change
Sales of goods	10 432 305	88,1	14 013 694	88,7	15,9
Services rendered	442 686	3,7	570 099	3,6	13,5
Interest received	100 163	0,8	129 371	0,8	13,6
Dividends received	237 779	2,0	279 517	1,8	8,4
Profits on foreign exchange and financial and other assets	379 018	3,2	466 333	3,0	10,9
Rebates	33 705	0,3	42 532	0,3	12,3
Other income	222 243	1,9	291 709	1,8	14,6
Total	11 847 899	100,0	15 793 255	100,0	15,5

Revised figures.Preliminary figures.

Table 3 – Details of expenditure in the ocean (marine) fisheries and related services industry, 2015 and 2017

	2015 ¹		20	Ammadiaad	
	R'000	% contribution	R'000	% contribution	Annualised % change
Purchases	4 227 794	42,7	5 980 202	42,9	18,9
Salaries, wages and bonuses	1 876 454	19,0	2 579 858	18,5	17,3
Payment to subcontractors	341 848	3,5	464 809	3,3	16,6
Advertising	89 421	0,9	131 217	0,9	21,1
Depreciation	299 804	3,0	420 459	3,0	18,4
Import and export costs	50 321	0,5	73 193	0,5	20,6
Insurance premiums	72 260	0,7	89 712	0,6	11,4
Interest paid	309 189	3,1	475 907	3,4	24,1
Losses on foreign exchange and financial and other assets	135 704	1,4	191 068	1,4	18,7
Leasing and hiring of plant and machinery	62 302	0,6	90 651	0,7	20,6
Repair and maintenance	494 032	5,0	669 993	4,8	16,5
Storage	49 011	0,5	63 631	0,5	13,9
Railage and transport-out	237 123	2,4	339 078	2,4	19,6
Electricity, property rates and water	157 258	1,6	218 602	1,6	17,9
Other expenditure	1 493 304	15,1	2 152 377	15,5	20,1
Total expenditure	9 895 825	100,0	13 940 757	100,0	18,7

Revised figures.Preliminary figures.

Table 4 – Details of assets, owners' equity and liabilities in the ocean (marine) fisheries and related services industry, 2015 and 2017

	2015 ¹		20	Annualised	
	R'000	% contribution	R'000	% contribution	% change
Total non-current assets	4 126 732	43,6	5 951 203	39,2	20,1
Property, plant and equipment and intangible assets excluding goodwill	2 338 413	24,7	3 197 805	21,1	16,9
Goodwill	87 183	0,9	110 238	0,7	12,4
Long-term investments	838 276	8,9	1 379 329	9,1	28,3
Other non-current assets	862 860	9,1	1 263 831	8,3	21,0
Total current assets	5 342 951	56,4	9 216 135	60,8	31,3
Trade and other receivables	1 928 916	20,4	2 817 878	18,6	20,9
Cash and bank	560 888	5,9	832 704	5,5	21,8
Inventory	1 412 208	14,9	1 813 108	12,0	13,3
Other current assets	1 440 939	15,2	3 752 445	24,7	61,4
Total assets	9 469 683	100,0	15 167 338	100,0	26,6
Owners' equity	3 984 890	42,1	5 851 721	38,6	21,2
Total non-current liabilities	2 860 771	30,2	5 618 664	37,0	40,1
Long-term liabilities	1 666 908	17,6	3 851 102	25,4	52,0
Other non-current liabilities	1 193 863	12,6	1 767 562	11,6	21,7
Total current liabilities	2 624 022	27,7	3 696 953	24,4	18,7
Trade and other payables	1 708 876	18,0	2 134 570	14,1	11,8
Bank overdraft	137 792	1,5	145 026	1,0	2,6
Other current liabilities	777 354	8,2	1 417 357	9,3	35,0
Total equity and liabilities	9 469 683	100,0	15 167 338	100,0	26,6

Revised figures.Preliminary figures.

Table 5 – Capital expenditure on new assets in the ocean (marine) fisheries and related services industry, 2015 and 2017

	2015¹		2017 ²		Annualised
	R'000	% contribution	R'000	% contribution	% change
Land, buildings and construction works	111 952	20,0	116 823	20,4	2,2
Computers and other IT equipment	12 566	2,2	13 848	2,4	5,0
Motor vehicles and other transport equipment	254 896	45,6	244 629	42,6	-2,0
Plant, machinery, furniture and other office equipment	137 607	24,6	149 585	26,0	4,3
Intangible non-produced assets	3 360	0,6	4 265	0,7	12,7
Other assets	39 339	7,0	45 445	7,9	7,5
Total	559 720	100,0	574 595	100,0	1,3

¹ Revised figures. ² Preliminary figures.

Table 6 – Carrying value of assets at the end of the financial year in the ocean (marine) fisheries and related services industry, 2015 and 2017

	2015¹		20172	Annualised	
	R'000	% contribution	R'000	% contribution	% change
Land, buildings and construction works	334 108	13,2	392 333	11,7	8,4
Computers and other IT equipment	31 917	1,3	42 905	1,3	15,9
Motor vehicles and other transport equipment	1 203 795	47,5	1 840 025	55,1	23,6
Plant, machinery, furniture and other office equipment	575 861	22,8	629 579	18,8	4,6
Intangible non-produced assets	260 871	10,3	309 078	9,3	8,8
Other assets	124 030	4,9	125 618	3,8	0,6
Total	2 530 582	100,0	3 339 538	100,0	14,9

Revised figures.Preliminary figures.

Table 7 – Details of employees in the ocean (marine) fisheries and related services industry, 2015 and 2017

2015 ¹							
	Female	Male	Total	Female	Male	Total	Annualised % change
		Number					
Permanent and working proprietors (paid and non-paid)	3 406	9 198	12 604	3 965	8 850	12 815	0,8
Temporary and Casual/seasonal	1 027	2 559	3 586	1 319	2 639	3 958	5,1
Total	4 433	11 757	16 190	5 284	11 489	16 773	1,8

Revised figures.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, 2015 and 2017

	2015 ¹	Aimansca		2015 ¹	2017 ²	Annualised	
	Metric tons	Metric tons	% change	R'000	R'000	% change	
Hake	36 625	40 184	4,7	893 274	1 142 831	13,1	
Squid	8 367	9 209	4,9	501 530	725 506	20,3	
Pilchard/sardine	29 812	30 218	0,7	201 550	280 128	17,9	
Anchovy	117 975	126 907	3,7	277 167	350 222	12,4	
Lobster, south coast rock	381	391	1,3	163 891	171 749	2,4	
Lobster, west coast rock	708	889	12,1	254 119	388 816	23,7	
Tuna, albacore	3 109	3 139	0,5	62 069	80 899	14,2	
Kingklip	990	1 071	4,0	61 704	70 429	6,8	
Other	19 022	24 655	13,8	592 716	823 679	17,9	
Total sales and transfers-out of own-caught fish	216 989	236 663	4,4	3 008 020	4 034 259	15,8	
Hake, whole or cuts (e.g. steaks), frozen	35 342	38 427	4,3	1 995 866	2 442 677	10,6	
Other white fish, whole or cuts, frozen	3 055	3 579	8,2	143 669	172 156	9,5	
Fish (including fillets), smoked	997	1 219	10,6	58 957	79 835	16,4	
Fish, canned	107 573	137 841	13,2	3 069 670	4 547 385	21,7	
Fish cakes	1 336	1 439	3,8	45 898	55 805	10,3	
Fish fingers	6 119	6 402	2,3	223 690	272 942	10,5	
Other processed fish	51 000	57 911	6,6	1 753 081	2 263 930	13,6	
Total sales and transfers-out of processed fish	205 422	246 818	9,6	7 290 831	9 834 730	16,1	
Other sales				133 454	144 705	4,1	
Total Sales				10 432 305	14 013 694	15,9	

Revised figures.Preliminary figures.

Table 9 – Details of income from services in the ocean (marine) fisheries and related services industry, 2015 and 2017

	2015 ¹		2017	Annualised	
	R'000	% contribution	R'000	% contribution	% change
Services related to marine fisheries	11 421	2,6	14 950	2,6	14,4
Quota fees received	146 060	33,0	176 571	31,0	9,9
Catch fees received	62 496	14,1	80 895	14,2	13,8
Processing fees received	20 495	4,6	27 268	4,8	15,3
Other services	202 214	45,7	270 415	47,4	15,6
Total income from services	442 686	100,0	570 099	100,0	13,5

Revised figures.Preliminary figures.

Table 10 – Details of purchases in the ocean (marine) fisheries and related services industry, 2015 and 2017

	2015 ¹		201	Annualised	
	R'000	% contribution	R'000	% contribution	% change
Provisions (victual for the crew)	75 178	1,8	91 982	1,5	10,6
Protective clothing for employees	99 754	2,4	128 832	2,2	13,6
Fuel lubricants and greases	823 438	19,4	1 011 068	16,9	10,8
Coal and gas	67 329	1,6	72 572	1,2	3,8
Containers, pallets and packaging materials	333 089	7,9	411 117	6,9	11,1
Fishing gear	118 761	2,8	143 536	2,4	9,9
Dry ice	63 119	1,5	83 872	1,4	15,3
Fish	2 258 187	53,4	3 494 052	58,4	24,4
Ingredients for processing	158 990	3,8	212 034	3,6	15,5
Other purchases	229 949	5,4	331 137	5,5	20,0
Total purchases	4 227 794	100,0	5 980 202	100,0	18,9

Revised figures.Preliminary figures.

Table 11 – Fishing vessels and fishing equipment in the ocean (marine) fisheries and related services industry, 2015 and 2017

	Fishing vessels	Book value of fishing vessels	Book value of fishing gear	Total
	Number		R'000	
2015 ¹	398	1 287 416	17 507	1 304 923
2017 ²	331	1 665 866	31 144	1 697 010
Annualised % change	-8,8	13,8	33,4	14,0

Revised figures.Preliminary figures.

Explanatory notes

Background

The results presented in this publication have been derived from the 2015 and 2017 ocean (marine) fisheries and related services surveys. This survey was based on a census of enterprises operating in the ocean (marine) fisheries and related services industry.

The 2015 census was drawn from Stats SA's business register (BR). Stats SA continuously updates its business register, based on the units registered for value added tax (VAT). For the 2017 census, the fishing rights database from the Department of Environment, Forestry and Fisheries (DEFF) was used to construct the ocean (marine) fisheries and related services industry sampling frame.

All figures exclude value added tax (VAT).

Reference period

The information was collected from enterprises for their financial year which ended on any date between 1 July 2016 and 30 June 2017.

Purpose of the survey

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.

Classification by industry

The 1993 edition of the *Standard Industrial Classification of all Economic Activities* (SIC), Fifth Edition, Report No. 09-09-02, was used to classify the statistical units in the survey. The SIC is based on the 1990 *International Standard Industrial Classification of all Economic Activities* (ISIC) with suitable adaptations for local conditions. Each enterprise is classified to an industry which reflects its predominant activity.

Statistical unit

The survey's 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.

Survey methodology and design

The census 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 850 enterprises.

Collection rate

Collection rate = ((collected enterprises + finalised investigations) / sample size)*100. The collection rate was 78,2%.

Weighting methodology

All the enterprises were assigned a weight of one because a census of the industry was conducted.

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 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

BR Business register

DTI Department of Trade and Industry

GDP Gross domestic product

IT Income tax

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

Current assets

These are assets that can be converted into cash within 12 months. They include:

- Trade and other receivables;
- Cash and bank;
- Inventory; and
- · Other current assets.

Current liabilities

These are debts or obligations that are due within 12 months. They include:

- Trade and other payables;
- · Bank overdraft; and
- Other current liabilities.

Employees

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).

Enterprise

A legal unit or a combination of legal units that includes and directly controls all functions necessary to carry out its production activities.

Equity

Residual interest in the enterprise's assets after deducting its liabilities.

Industry

An industry consists of a group of enterprises engaged in the same or similar kinds of economic activity. Industries are defined in the System of National Accounts (SNA) in the same way as in the Standard industrial Classification of all Economic activities (SIC), Fifth Edition, Report No. 09-90-02 of January 1993.

Non-current assets

Assets not expected to be converted into cash, sold or exchanged within the normal 12-month operating cycle of the enterprise. They include:

- Property, plant and equipment and intangible assets;
- Goodwill:
- Long-term investments; and
- Other non-current assets.

Non-current liabilities

Liabilities that are not required to be paid within 12 months. They include:

- Long-term loans; and
- Other non-current liabilities.

Other assets

Includes:

· Other intangible assets

Other current expenditure

Includes:

- Accommodation;
- Bursaries;
- Donations and sponsorships;
- Entertainment;
- Management and administrative fees;
- Motor vehicle running expenditure;

Other income

Includes:

- Rental on land, buildings and other structures; and
- Water rights traded.

Sales of goods

Includes:

- 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

Includes:

- 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).

- Rental on land, buildings and other structures;
- Quota, harbour and permit fees;
- Research and development costs;
- Regional service levels; and
- Membership or affiliation costs.

General information

Stats SA publishes approximately 300 different statistical releases each year. It is not economically viable to produce them in more than one of South Africa's 11 official languages. Since the releases are used extensively, not only locally but also by international economic and social-scientific communities, Stats SA releases are published in English only.

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