

Construction industry, 2011

4 038	443	876	1 144	2 258	25 467	25 172	50 639
4 050	485	962	1 362	2 690	25 249	25 062	50 311
4 026	523	1 042	1 622	3 204	25 540	25 453	50 993
3 814	537	1 076	1 667	3 295	24 509	24 472	48 981
3 750	540	1 079	1 547	3 078	23 346	22 866	46 212
3 851	497	998	1 260	2 494	21 483	20 628	42 111
3 786	439	886	1 184	2 336	18 882	18 736	37 620
3 176	410	831	1 586	3 141	13 639	14 163	27 802
2 784	379	776	1 724	3 453	11 894	12 938	24 832
2 276	342	705	1 737	3 541	10 297	11 575	21 872
1 735	300	628	1 557	3 169	8 204	9 367	17 571
1 292	244	522	1 457	3 024	6 515	7 707	14 222
1 031	199	426	1 291	2 665	5 755	6 657	12 442
808	142	315	563	2 033	4 280	5 279	9 559

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Construction industry, 2011

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Statistics South Africa

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Statistician-General

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Construction industry, 2011

1. Introduction

This publication updates statistical release P5002 (*Construction industry, 2011*), and adds information and communication technology usage, details of services rendered, details of purchases, a breakdown of the client base and the breakdown of income from services by province. The financial information has been revised following the reclassification of some enterprises.

Estimates are presented in respect of the 2011 construction industry large sample survey (LSS). The 2011 construction industry LSS is based on data from a sample of approximately 4 000 enterprises drawn from a sampling frame of 37 959 enterprises which were operating between 1 July 2010 and 30 June 2011. The data for the number of employees were provided for the last pay period in June 2011. Data were collected at the 4-digit SIC level of classification of enterprises. The previous construction industry LSS was conducted in 2007 (Construction industry, Report No. 50-02-01 (2007)).

1.1 Scope and coverage

The 2011 construction 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:

- Site preparation (SIC 5010);
- Construction of buildings (SIC 5021);
- Construction of civil engineering structures (SIC 5022);
- Construction of other structures (SIC 5023);
- Construction by specialist trade contractors (SIC 5024);
- Plumbing (SIC 5031);
- Electrical contractors (SIC 5032);
- Shopfitting (SIC 5033);
- Other building installation (SIC 5039);
- Painting and decorating (SIC 5041);
- Other building completion (SIC 5049); and
- Renting of construction or demolition equipment with operators (SIC 5050).

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 services rendered, details of purchases, information and communication technology usage, client base and the breakdown of income from services by province.

1.3 Reference period

The questionnaires were completed for the financial year of the enterprise which ended on any date between 1 July 2010 and 30 June 2011, according to the usual reporting schedule of the enterprise.

Example

- o 1 October 2009 – 30 September 2010
- o 1 January 2010 – 31 December 2010
- o 1 February 2010 – 31 January 2011
- o 1 March 2010 – 28 February 2011
- o 1 April 2010 – 31 March 2011

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 construction industry in South Africa.

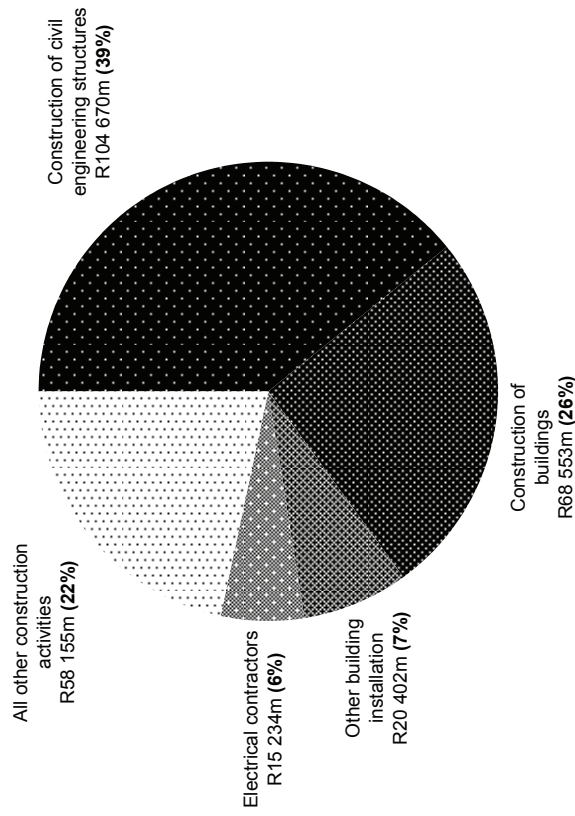
One measure of the likely difference is given by the standard error (SE), which indicates the extent to which an estimate might have varied by chance because only a sample of enterprises was used. The relative standard error (RSE) provides an immediate indication of the percentage error likely to have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

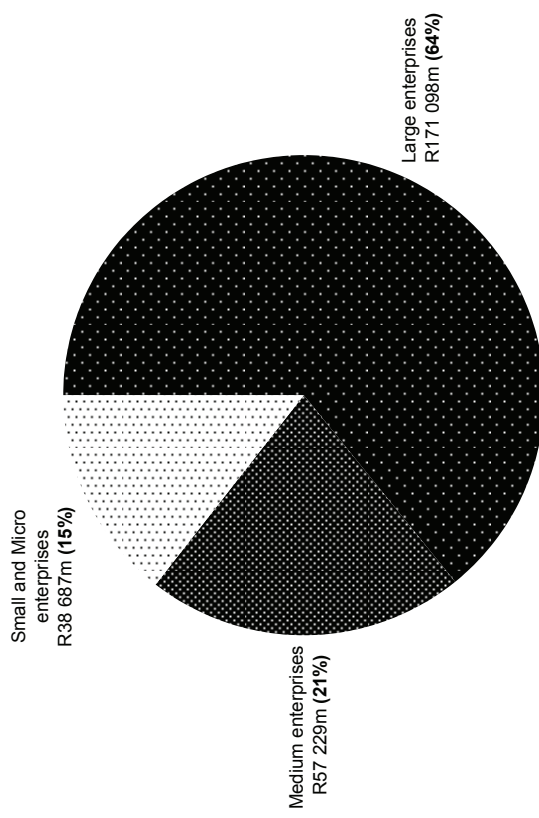
2. Summary of findings for the year 2011

Figure 1 – Income in the construction industry, 2011



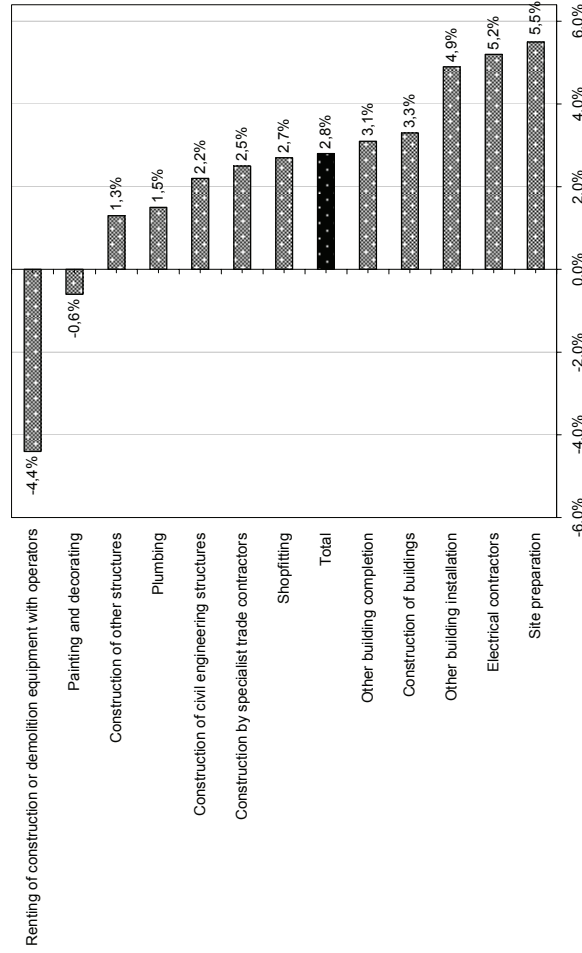
The total income for the construction industry in 2011 was R267 014 million. The largest contributor to the total income was 'construction of civil engineering structures' (R104 670 million or 39%), followed by 'construction of buildings' (R68 553 million or 26%), 'other building installations' (R20 402 million or 7%), and 'electrical contractors' (R15 234 million or 6%) (Figure 1 and Table 3, page 9).

Figure 2 – Income by enterprise size in the construction industry, 2011



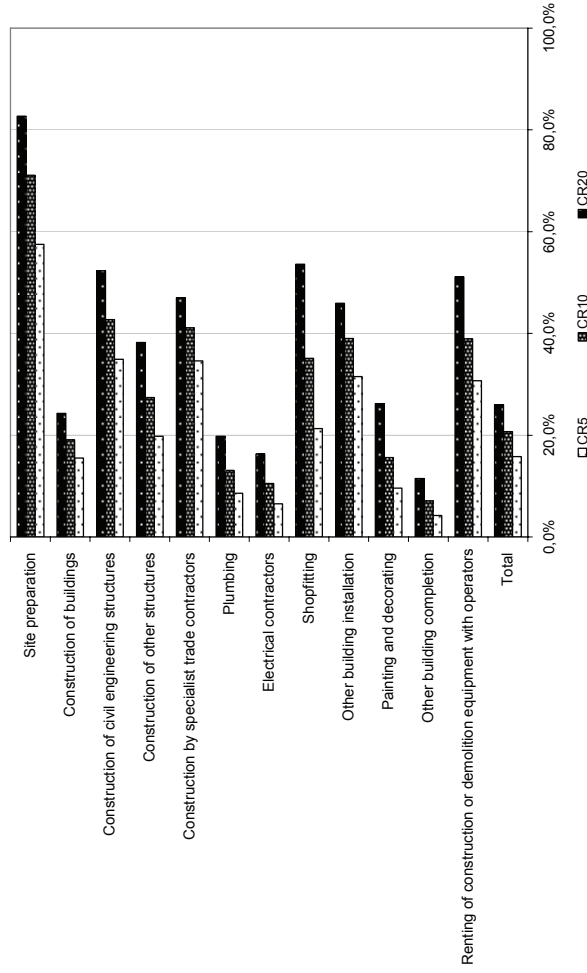
Large enterprises (those with turnover equal to or greater than R52 million) generated R171 098 million or 64% of the total income of the construction industry, followed by medium enterprises (R57 229 million or 21%), and small and micro enterprises (R38 687 million or 15%) (Figure 2 and Table 4, page 10).

Figure 3 – Profit margin in the construction industry, 2011



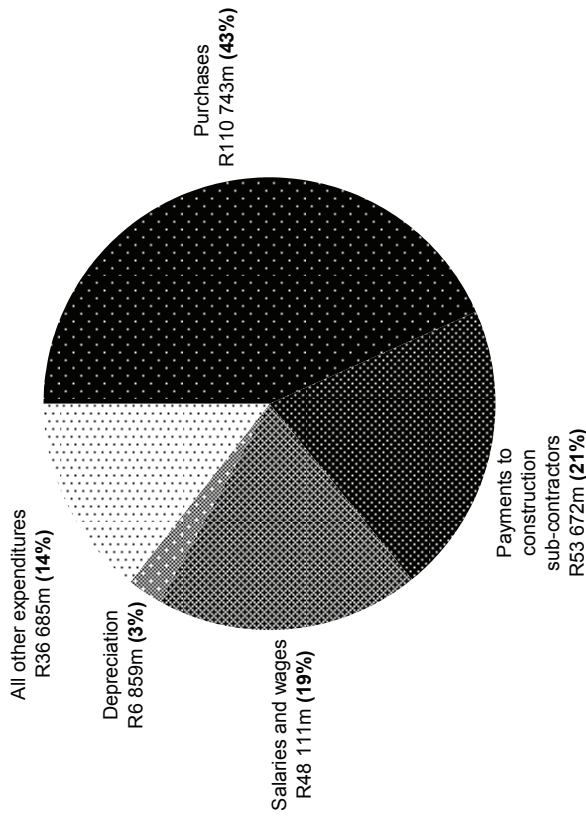
The profit margin for the construction industry was 2,8% in 2011. 'Site preparation' had the highest profit margin at 5,5%, followed by 'electrical contractors' at 5,2% and 'other building installation' at 4,9%. 'Renting of construction or demolition equipment with operators' had the lowest profit margin of -4,4% (Figure 3 and Table 2, page 8).

Figure 4 – Concentration ratios (CR) in the construction industry, 2011



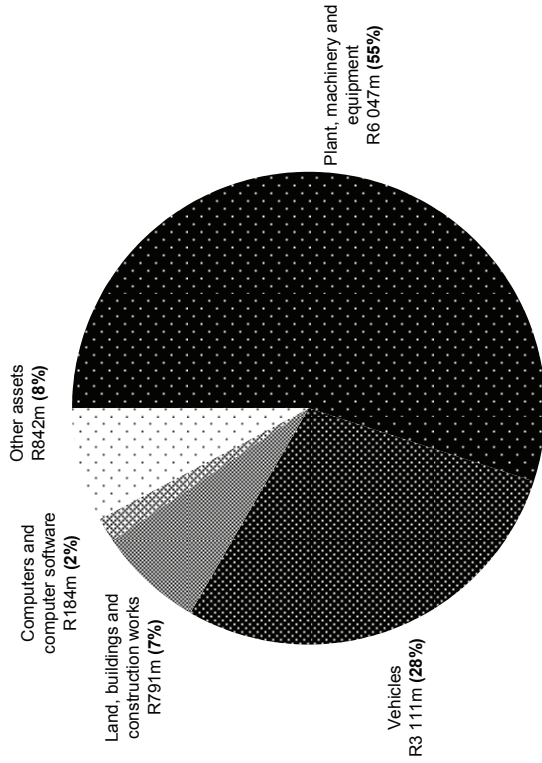
The 20 largest enterprises contributed 25,9% of the total income of the construction industry in 2011. 'Site preparation' had the highest concentration ratios in all three categories: CR5 (57,5%), CR10 (71,1%) and CR20 (82,7%). 'Other building completion' had the lowest concentration ratios in all three categories: CR5 (4,2%), CR10 (7,1%) and CR20 (11,5%) (Figure 4 and Table 5, page 11).

Figure 5 – Composition of expenditure in the construction industry, 2011



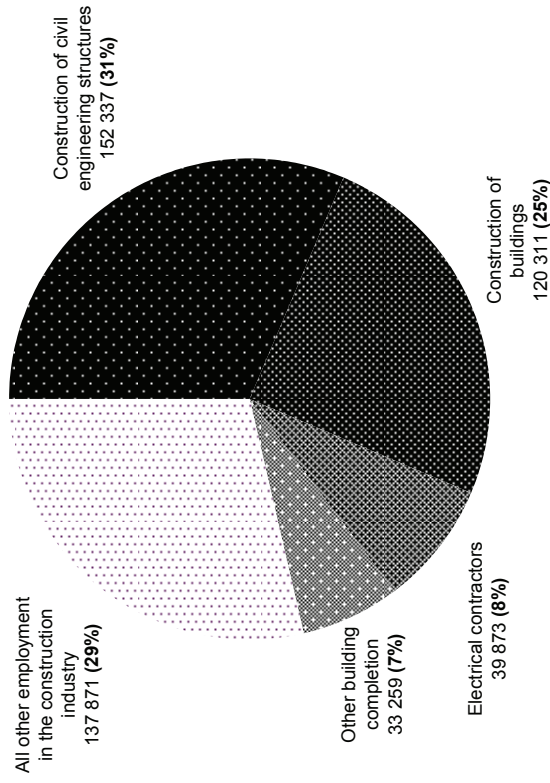
Expenditure in the construction industry in 2011 amounted to R256 070 million. The largest expenditure was on 'purchases' (R110 743 million or 43%), followed by 'payments to construction sub-contractors' (R53 672 million or 21%), 'salaries and wages' (R48 111 million or 19%) and 'depreciation' (R6 859 million or 3%) (Figure 5 and Table 6, pages 12-13).

Figure 6 – Capital expenditure on new assets in the construction industry, 2011



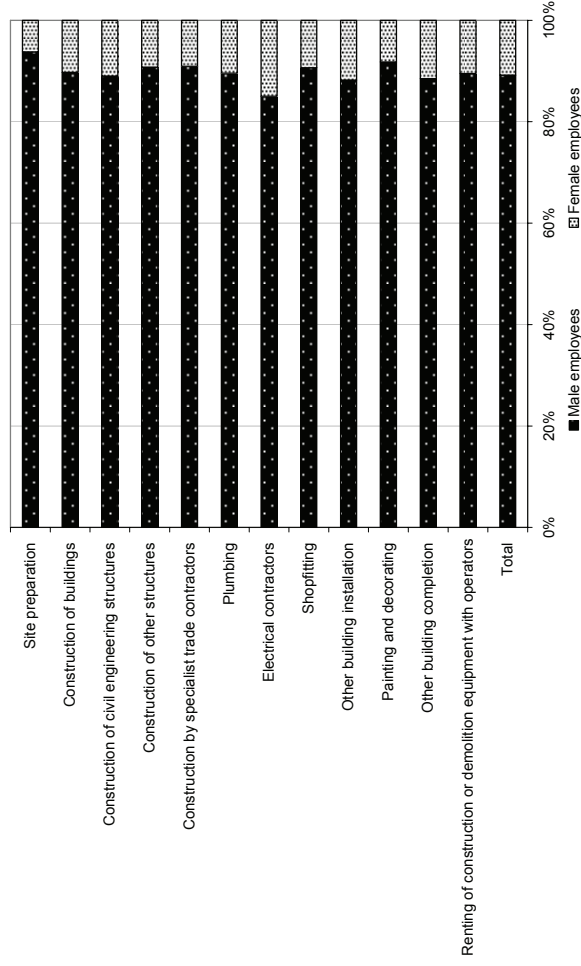
The total capital expenditure on new assets in the construction industry in 2011 was R10 975 million. The largest category of capital expenditure was 'plant, machinery and equipment' (R6 047 million or 55%), followed by 'vehicles' (R3 111 million or 28%) and 'land, buildings and construction works' (R791 million or 7%) (Figure 6 and Table 10, page 17).

Figure 7 – Employment in the construction industry, 2011



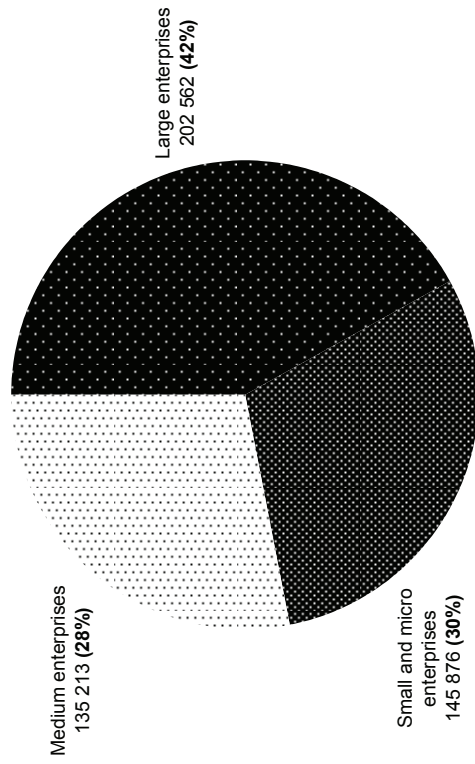
The total number of persons employed in the construction industry at the end of June 2011 was 483 651. 'Construction of civil engineering structures' employed the largest number of persons (152 337 or 31%), followed by 'construction of buildings' (120 311 or 25%), 'electrical contractors' (39 873 or 8%) and 'other building completion' (33 259 or 7%) (Figure 7 and Table 11, page 18).

Figure 8 – Gender ratios in the construction industry, 2011



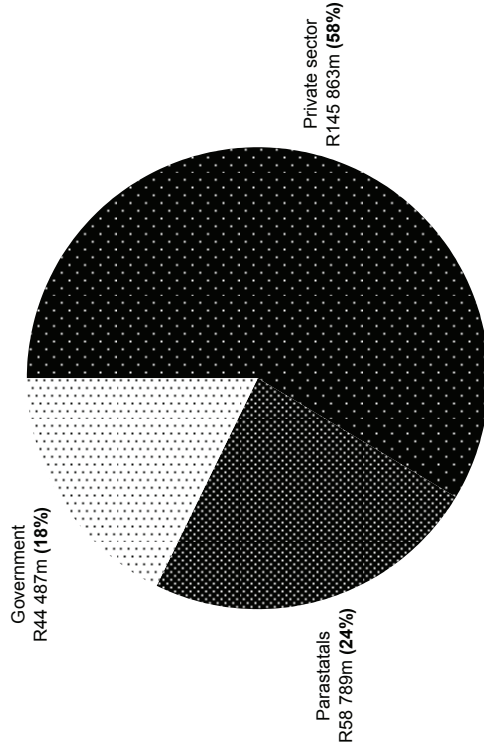
The proportion of females out of the total persons employed in the construction industry at the end of June 2011 was 11%. The sector with the highest proportion of females employed was 'electrical contractors' (15%) (Figure 8 and Table 11, page 18).

Figure 9 – Employment by enterprise size in the construction industry, 2011



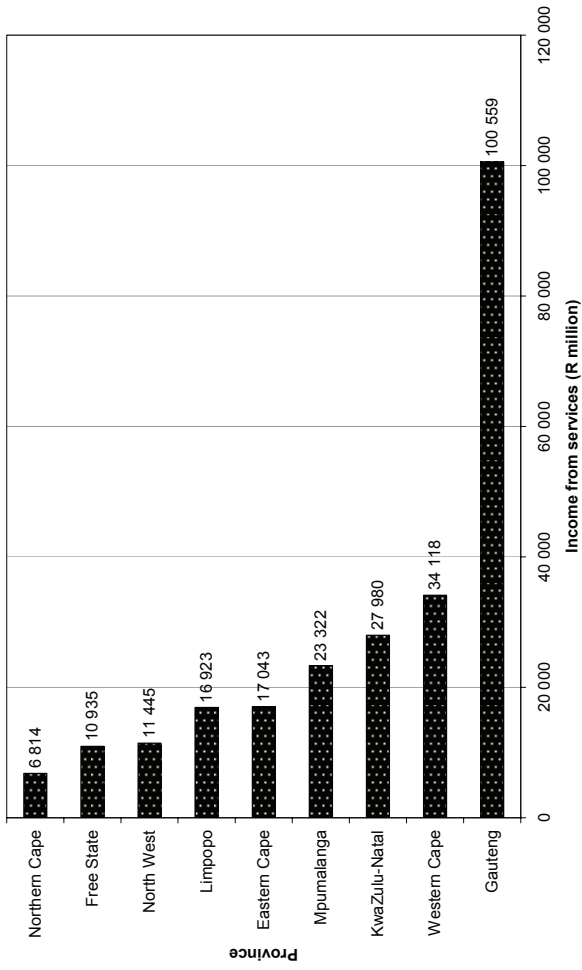
Large enterprises employed the highest number of persons (202 562 or 42%) in the construction industry at the end of June 2011. Medium enterprises employed 135 213 persons (or 28%) and small and micro enterprises employed 145 876 persons (or 30%) (Figure 9 and Table 13, page 20).

Figure 10 – Income from services by type of client in the construction industry, 2011



The private sector (businesses and individuals) was the major client of the construction industry in 2011, contributing R145 863 million or 58% to the income from services rendered, followed by parastatals (major public entities) (R58 789 million or 24%) and government (R44 487 million or 18%) (Figure 10 and Table 17, page 24).

Figure 11 – Breakdown of income from services by province in the construction industry, 2011



Most construction activities in 2011 took place in Gauteng (R100 559 million or 40%), followed by Western Cape (R34 118 million or 14%) and Kwazulu-Natal (R27 980 million or 11%) (Figure 11 and Table 18, page 25).

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Statistician-General

3. Tables

Table 1 – Principal statistics in the construction industry, 2011

Type of service	Total income	Total expenditure	Total value of opening inventories	Total value of closing inventories	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
Site preparation	8 903	8 234	176	171	664	2 188	2 444	871
Construction of buildings	68 553	65 606	8 162	8 424	3 209	6 305	6 493	1 663
Construction of civil engineering structures	104 670	101 145	2 784	3 392	4 133	12 755	13 900	4 701
Construction of other structures	3 046	2 866	187	89	82	734	655	88
Construction by specialist trade contractors	13 618	13 043	218	155	512	1 184	1 146	315
Plumbing	3 590	3 496	67	65	92	465	454	148
Electrical contractors	15 234	14 143	530	485	1 046	1 383	1 564	570
Shopfitting	1 523	1 473	46	55	59	147	131	34
Other building installation	20 402	18 966	845	821	1 412	1 187	1 127	418
Painting and decorating	2 569	2 643	73	165	18	156	177	75
Other building completion	14 616	13 949	1 621	1 600	646	1 213	1 139	303
Renting of construction or demolition equipment with operators	10 290	10 506	137	143	-210	7 958	7 421	1 789
Total	267 014	256 070	14 846	15 565	11 663	35 675	36 651	10 975

Table 2 – Profit margin in the construction industry, 2011

Type of service	Net profit after tax	Turnover	Profit margin ¹
	R million		
Site preparation	477	8 643	5,5
Construction of buildings	2 216	66 525	3,3
Construction of civil engineering structures	2 264	101 577	2,2
Construction of other structures	39	2 988	1,3
Construction by specialist trade contractors	321	12 970	2,5
Plumbing	53	3 523	1,5
Electrical contractors	782	15 063	5,2
Shopfitting	41	1 503	2,7
Other building installation	971	19 803	4,9
Painting and decorating	-15	2 548	-0,6
Other building completion	452	14 444	3,1
Renting of construction or demolition equipment with operators	-434	9 934	-4,4
Total	7 167	259 521	2,8

¹ Profit margin = Net profit after tax divided by turnover multiplied by 100.

Table 3 – Income in the construction industry, 2011

Type of service	R million							Total
	Sales	Services	Rental and leasing income	Interest	Profit on sale or revaluation of assets	Other	Total	
Site preparation	10	8 532	101	31	96	133	8 903	
Construction of buildings	1 119	64 996	410	827	433	768	68 553	
Construction of civil engineering structures	3 254	98 087	236	731	275	2 087	104 670	
Construction of other structures	64	2 911	13	11	16	31	3 046	
Construction by specialist trade contractors	4	12 951	15	509	42	97	13 618	
Plumbing	67	3 447	9	19	29	19	3 590	
Electrical contractors	143	14 906	14	99	22	50	15 234	
Shopfitting	0	1 503	0	13	2	5	1 523	
Other building installation	2 868	16 895	40	124	238	237	20 402	
Painting and decorating	189	2 357	2	7	1	13	2 569	
Other building completion	1 094	13 192	158	61	47	64	14 616	
Renting of construction or demolition equipment with operators	427	9 362	145	47	138	171	10 290	
Total	9 239	249 139	1 143	2 479	1 339	3 675	267 014	

Table 4 – Income by enterprise size in the construction industry, 2011

Type of service	Large enterprises	Medium enterprises	Small and micro enterprises	Total of all enterprises
	R million			
Site preparation	7 612	1 007	284	8 903
Construction of buildings	41 597	17 644	9 312	68 553
Construction of civil engineering structures	89 852	12 381	2 437	104 670
Construction of other structures	684	1 498	864	3 046
Construction by specialist trade contractors	6 859	3 450	3 309	13 618
Plumbing	161	1 198	2 231	3 590
Electrical contractors	3 277	5 046	6 911	15 234
Shopfitting	229	942	352	1 523
Other building installation	12 599	4 818	2 985	20 402
Painting and decorating	145	1 217	1 207	2 569
Other building completion	1 819	5 132	7 665	14 616
Renting of construction or demolition equipment with operators	6 264	2 896	1 130	10 290
Total	171 098	57 229	38 687	267 014

Table 5 – Relative contribution (concentration ratios) of the largest enterprises in the construction industry, 2011

Type of service	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	%	R million	%
Site preparation	8 903	5 117	57,5	6 326	71,1	7 365	82,7
Construction of buildings	68 553	10 625	15,5	13 073	19,1	16 631	24,3
Construction of civil engineering structures	104 670	36 528	34,9	44 702	42,7	54 745	52,3
Construction of other structures	3 046	604	19,8	834	27,4	1 165	38,2
Construction by specialist trade contractors	13 618	4 706	34,6	5 599	41,1	6 400	47,0
Plumbing	3 590	308	8,6	469	13,1	711	19,8
Electrical contractors	15 234	984	6,5	1 598	10,5	2 477	16,3
Shopfitting	1 523	324	21,3	534	35,1	817	53,6
Other building installation	20 402	6 418	31,5	7 959	39,0	9 362	45,9
Painting and decorating	2 569	246	9,6	401	15,6	674	26,2
Other building completion	14 616	617	4,2	1 045	7,1	1 683	11,5
Renting of construction or demolition equipment with operators	10 290	3 158	30,7	4 001	38,9	5 261	51,1
Total	267 014	42 042²	15,7³	55 222²	20,7³	69 264²	25,9³

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

³ Relative contribution = income of the largest enterprises divided by total income multiply by 100.

Table 6 – Expenditure in the construction industry, 2011

Type of service	Purchases	Payments to construction sub-contractors	Salaries and wages	Depreciation	Rental of plant, machinery and equipment	Vehicle running costs	Interest paid	Repairs and maintenance	R million
Site preparation	2 034	841	2 366	507	1 063	75	125	328	
Construction of buildings	29 211	20 211	8 479	782	704	647	661	199	
Construction of civil engineering structures	41 307	23 704	20 997	2 551	2 440	808	714	551	
Construction of other structures	1 343	207	597	107	120	77	25	14	
Construction by specialist trade contractors	5 269	4 047	1 758	286	154	195	74	43	
Plumbing	1 524	181	1 058	111	36	134	42	20	
Electrical contractors	7 097	765	3 513	361	116	411	97	108	
Shopfitting	889	62	279	34	8	35	7	6	
Other building installation	10 738	735	3 789	257	78	286	99	282	
Painting and decorating	1 152	302	659	48	75	70	11	16	
Other building completion	7 163	2 098	2 395	350	159	328	35	110	
Renting of construction or demolition equipment with operators	3 016	519	2 221	1 465	590	215	677	512	
Total	110 743	53 672	48 111	6 859	5 543	3 281	2 567	2 189	

Table 6 – Expenditure in the construction industry, 2011 (concluded)

Type of service	Administration and management fees	Losses on financial and other assets: disposal of assets, realisation for cash and revaluation of assets	Rental of land, building and other structures	Insurance	Telecommunication services	Other	Total
Site preparation	16	82	38	39	25	695	8 234
Construction of buildings	292	265	346	349	230	3 230	65 606
Construction of civil engineering structures	952	946	388	403	287	5 097	101 145
Construction of other structures	52	15	24	35	23	227	2 866
Construction by specialist trade contractors	58	27	139	83	84	826	13 043
Plumbing	42	6	41	56	48	197	3 496
Electrical contractors	46	35	155	179	132	1 128	14 143
Shopfitting	1	4	15	16	9	108	1 473
Other building installation	185	165	238	98	105	1 911	18 966
Painting and decorating	13	7	43	26	32	189	2 643
Other building completion	12	60	124	193	133	789	13 949
Renting of construction or demolition equipment with operators	46	49	104	168	55	869	10 506
Total	1 715	1 661	1 655	1 645	1 163	15 266	256 070

Table 7 – Carrying value of assets at the end of the financial year in the construction industry, 2011

Type of service	R million						Total book value of fixed assets
	Land, buildings and construction works	Computers and IT equipment	Motor vehicles	Plant, machinery and equipment	Other assets		
Site preparation	129	13	167	2 010	125	2 444	
Construction of buildings	2 643	112	1 626	1 735	377	6 493	
Construction of civil engineering structures	1 302	154	2 638	8 345	1 461	13 900	
Construction of other structures	40	3	287	313	12	655	
Construction by specialist trade contractors	70	22	388	591	75	1 146	
Plumbing	47	2	263	103	39	454	
Electrical contractors	258	28	682	430	166	1 564	
Shopfitting	17	2	45	38	29	131	
Other building installation	191	23	466	267	180	1 127	
Painting and decorating	24	7	91	45	10	177	
Other building completion	303	77	561	194	4	1 139	
Renting of construction or demolition equipment with operators	176	14	1 325	4 188	1 718	7 421	
Total	5 200	457	8 539	18 259	4 196	36 651	

Table 8 – Details of assets in the construction industry, 2011

Type of service	Current assets					Non-current assets					Total assets
	Bank	Debtors	Inventory	Other	Total	Fixed	Goodwill	Long-term investment	Other	Total	
	R million										
Site preparation	544	1 532	171	474	2 721	2 372	72	213	103	2 760	5 481
Construction of buildings	5 166	6 843	8 424	4 751	25 184	6 330	163	4 010	7 295	17 798	42 982
Construction of civil engineering structures	10 012	21 404	3 392	5 092	39 900	12 694	1 206	2 391	3 003	19 294	59 194
Construction of other structures	133	318	89	43	583	643	12	38	301	994	1 577
Construction by specialist trade contractors	6 970	1 608	155	2 165	10 898	1 112	34	124	1 340	2 610	13 508
Plumbing	260	356	65	121	802	429	25	65	185	704	1 506
Electrical contractors	1 313	1 846	485	396	4 040	1 461	103	242	459	2 265	6 305
Shopfitting	114	133	55	75	377	104	27	97	59	287	664
Other building installation	1 551	3 655	821	783	6 810	989	138	374	987	2 488	9 298
Painting and decorating	121	252	165	76	614	167	10	47	109	333	947
Other building completion	1 127	1 679	1 600	3 784	8 190	1 136	3	408	70	1 617	9 807
Renting of construction or demolition equipment with operators	753	1 612	143	365	2 873	6 626	795	436	219	8 076	10 949
Total	28 064	41 238	15 565	18 125	102 992	34 063	2 588	8 445	14 130	59 226	162 218

Table 9 – Details of liabilities and owners' equity in the construction industry, 2011

Type of service	Current liabilities				Non-current liabilities			Total liabilities	Owners' equity	Liabilities and owners' equity
	Creditors	Overdraft	Other	Total	Long-term loan	Other	Total			
	R million									
Site preparation	1 106	54	1 008	2 168	759	1 013	1 772	3 940	1 541	5 481
Construction of buildings	8 605	1 635	6 496	16 736	5 206	4 760	9 966	26 702	16 280	42 982
Construction of civil engineering structures	23 830	3 092	9 684	36 606	2 529	2 964	5 493	42 099	17 095	59 194
Construction of other structures	309	57	280	646	148	317	465	1 111	466	1 577
Construction by specialist trade contractors	1 489	86	6 939	8 514	319	2 725	3 044	11 558	1 950	13 508
Plumbing	333	73	146	552	114	282	396	948	558	1 506
Electrical contractors	1 489	194	464	2 147	711	614	1 325	3 472	2 833	6 305
Shopfitting	107	24	47	178	81	60	141	319	345	664
Other building installation	3 005	276	1 239	4 520	439	794	1 233	5 753	3 545	9 298
Painting and decorating	481	50	79	610	78	70	148	758	189	947
Other building completion	1 343	123	2 137	3 603	650	2 134	2 784	6 387	3 420	9 807
Renting of construction or demolition equipment with operators	1 067	86	1 837	2 990	2 584	1 760	4 344	7 334	3 615	10 949
Total	43 164	5 750	30 356	79 270	13 618	17 493	31 111	110 381	51 837	162 218

Table 10 – Capital expenditure on new assets in the construction industry, 2011

Type of service	Land, buildings and construction	Computers and computer software	Vehicles	Plant, machinery and equipment	Other	Total
	R million					
Site preparation	3	7	94	726	41	871
Construction of buildings	306	59	773	460	65	1 663
Construction of civil engineering structures	282	73	725	2 980	641	4 701
Construction of other structures	1	1	25	61	0	88
Construction by specialist trade contractors	8	4	154	124	25	315
Plumbing	10	1	98	39	0	148
Electrical contractors	35	12	260	255	8	570
Shopfitting	0	1	27	5	1	34
Other building installation	85	11	196	106	20	418
Painting and decorating	9	1	48	16	1	75
Other building completion	35	6	231	29	2	303
Renting of construction or demolition equipment with operators	17	8	480	1 246	38	1 789
Total	791	184	3 111	6 047	842	10 975

Table 11 – Employment in the construction industry at the end of June 2011

Type of service	Working proprietors			Construction workers			Other workers			Total		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
	Number											
Site preparation	387	117	504	15 897	780	16 677	749	231	980	17 033	1 128	18 161
Construction of buildings	4 004	635	4 639	99 474	7 241	106 715	4 464	4 493	8 957	107 942	12 369	120 311
Construction of civil engineering structures	2 813	660	3 473	128 011	12 119	140 130	4 781	3 953	8 734	135 605	16 732	152 337
Construction of other structures	342	78	420	8 694	574	9 268	425	307	732	9 461	959	10 420
Construction by specialist trade contractors	587	58	645	20 898	1 025	21 923	1 529	1 207	2 736	23 014	2 290	25 304
Plumbing	668	57	725	11 820	429	12 249	762	1 056	1 818	13 250	1 542	14 792
Electrical contractors	1 125	418	1 543	31 769	3 600	35 369	1 012	1 949	2 961	33 906	5 967	39 873
Shopfitting	76	66	142	2 668	119	2 787	260	124	384	3 004	309	3 313
Other building installation	976	155	1 131	23 498	1 948	25 446	2 028	1 440	3 468	26 502	3 543	30 045
Painting and decorating	246	95	341	11 250	581	11 831	199	369	568	11 695	1 045	12 740
Other building completion	1 350	574	1 924	25 830	1 383	27 213	2 257	1 865	4 122	29 437	3 822	33 259
Renting of construction or demolition equipment with operators	833	83	916	18 170	1 633	19 803	1 669	708	2 377	20 672	2 424	23 096
Total	13 407	2 996	16 403	397 979	31 432	429 411	20 135	17 702	37 837	431 521	52 130	483 651

Table 12 – Employment by status (permanent, casual or temporary) in the construction industry at the end of June 2011

Type of service	Permanent		Temporary			Casual			Total	
	Male	Female	Total	Male	Female	Total	Male	Female		Total
	Number									
Site preparation	16 232	1 026	17 258	412	33	445	389	69	458	18 161
Construction of buildings	84 692	10 539	95 231	17 590	1 547	19 137	5 660	283	5 943	120 311
Construction of civil engineering structures	86 013	11 287	97 300	44 295	4 625	48 920	5 297	820	6 117	152 337
Construction of other structures	7 083	701	7 784	2 270	258	2 528	108	0	108	10 420
Construction by specialist trade contractors	21 425	2 235	23 660	1 061	47	1 108	528	8	536	25 304
Plumbing	12 520	1 435	13 955	324	107	431	406	0	406	14 792
Electrical contractors	27 884	5 065	32 949	3 000	399	3 399	3 022	503	3 525	39 873
Shopfitting	2 738	300	3 038	119	9	128	147	0	147	3 313
Other building installation	24 774	3 393	28 167	1 173	145	1 318	555	5	560	30 045
Painting and decorating	9 740	1 006	10 746	1 843	34	1 877	112	5	117	12 740
Other building completion	27 132	3 803	30 935	1 561	13	1 574	744	6	750	33 259
Renting of construction or demolition equipment with operators	18 975	2 291	21 266	1 597	113	1 710	100	20	120	23 096
Total	339 208	43 081	382 289	75 245	7 330	82 575	17 068	1 719	18 787	483 651

Table 13 – Employment by enterprise size in the construction industry at the end of June 2011

Type of service	Number				Total of all enterprises
	Large enterprises	Medium enterprises	Small and micro enterprises		
Site preparation	15 065	2 405	691		18 161
Construction of buildings	40 323	38 822	41 166		120 311
Construction of civil engineering structures	109 999	36 915	5 423		152 337
Construction of other structures	1 629	3 077	5 714		10 420
Construction by specialist trade contractors	3 672	7 747	13 885		25 304
Plumbing	237	4 152	10 403		14 792
Electrical contractors	5 935	10 735	23 203		39 873
Shopfitting	473	1 941	899		3 313
Other building installation	9 544	9 384	11 117		30 045
Painting and decorating	616	3 680	8 444		12 740
Other building completion	2 389	10 069	20 801		33 259
Renting of construction or demolition equipment with operators	12 680	6 286	4 130		23 096
Total	202 562	135 213	145 876		483 651

Table 14 – Details of income from services rendered for construction industry, 2007 and 2011

Type of construction activity	R million		% contribution to total income from services		Annualised % change
	2007	2011	2007	2011	
Site preparation	3 017	7 680	1,9	3,1	26,3
Rental of construction equipment with driver/operator	3 322	9 144	2,0	3,7	28,8
Construction of residential buildings	24 695	19 078	15,2	7,7	-6,2
Construction of commercial and industrial buildings	12 036	22 482	7,4	9,0	16,9
Construction of other non-residential buildings	2 560	7 810	1,6	3,1	32,2
Construction, alterations and repair of highways, streets, bridges, tunnels and railways	11 632	30 872	7,2	12,4	27,6
Construction, alterations and repair of airports, airfields and landing strips and harbours	354	1 730	0,2	0,7	48,7
Construction, alterations and repair of dams, reservoirs, pipelines, irrigation systems, towers and sewerage systems	5 898	9 444	3,6	3,8	12,5
Other civil engineering works	14 602	24 326	9,0	9,8	13,6
Construction of other structures	4 073	7 382	2,5	3,0	16,0
Construction by specialist trade contractors	10 182	7 778	6,3	3,1	-6,5
Plumbing	2 927	3 399	1,8	1,4	3,8
Electrical contracting	9 595	13 673	5,9	5,5	9,3
Shopfitting	1 158	1 819	0,7	0,7	12,0
Other building installations	11 093	15 701	6,8	6,3	9,1
Painting and decorating	1 696	2 972	1,0	1,2	15,1
Other building completion	13 313	6 918	8,2	2,8	-15,1
Architectural services	73	46	0,0	0,0	-10,9
Engineering services	1 446	1 077	0,9	0,4	-7,1
Other activities	1 717	2 136	1,1	0,9	5,6
Total income from services rendered (excluding work subcontracted out)	135 389	195 467	83,3	78,5	9,6
Payments to subcontractors	27 212	53 672	16,7	21,5	18,5
Total income from services rendered	162 601	249 139	100,0	100,0	11,3

Table 15 – Details of purchases for construction industry, 2007 and 2011

Material	R million		% contribution to total purchases		Annualised % change
	2007	2011	2007	2011	
Cement	5 946	7 475	7,6	6,7	5,9
Sand and aggregate	4 460	5 309	5,7	4,8	4,5
Ready-mix concrete	6 360	7 128	8,2	6,4	2,9
Walling material (including bricks and blocks)	5 288	9 092	6,8	8,2	14,5
Roofing material (including roofing sheets)	4 006	3 463	5,1	3,1	-3,6
Flooring material (including tiles and carpets)	2 737	4 209	3,5	3,8	11,4
Reinforcing and structural steel	12 699	17 293	16,3	15,6	8,0
Plumbing materials	3 697	4 498	4,7	4,1	5,0
Electrical fittings, equipment and supplies	12 941	16 971	16,6	15,3	7,0
Doors, windows, ceilings, door handles, kitchen, cupboards and baths	3 970	5 319	5,1	4,8	7,6
Paint and limewashes (including pigments, binders and thinners)	2 277	3 119	2,9	2,8	8,2
Prefabricated gypsum, cement and earthenware products (beams, pipes, sheets and ceilings)	3 007	3 444	3,9	3,1	3,5
Asphalt and bitumen products	3 637	6 798	4,7	6,1	16,9
Other construction materials	5 088	4 386	6,5	4,0	-3,6
Total purchases of construction material	76 113	98 504	97,6	88,9	6,7
Fuel for off-road vehicles, machinery and trucks used in construction	*	5 571	-	5,0	-
Parts and spares for off-road vehicles	*	2 957	-	2,7	-
Glass	*	723	-	0,7	-
Explosives	*	656	-	0,6	-
Other purchases	1 903	2 332	2,4	2,1	-
Total purchases	78 016	110 743	100	100,0	9,2

*Not asked separately in 2007

Table 16 – Income from services rendered by client base in the construction industry, 2007 and 2011

Client	R million		% contribution to total income from services		Annualised % change
	2007	2011	2007	2011	
Private (businesses and individuals)	1 16 941	145 863	71,9	58,5	5,7
Major public entities (parastatals)	23 923	58 789	14,7	23,6	25,2
Government (national, provincial and local)	21 737	44 487	13,4	17,9	19,6
Total income	162 601	249 139	100,0	100,0	11,3

Table 17 – Income from services rendered by client base in the construction industry, 2011

Type of service	Private (businesses and individuals)	Major public entities (parastatals)	Government (national, provincial and local)	Total income
	R million			
Site preparation	7 987	430	115	8 532
Construction of buildings	44 953	7 654	12 389	64 996
Construction of civil engineering structures	35 497	37 856	24 734	98 087
Construction of other structures	2 512	166	233	2 911
Construction by specialist trade contractors	5 850	5 606	1 495	12 951
Plumbing	2 619	274	554	3 447
Electrical contractors	11 975	1 488	1 443	14 906
Shopfitting	1 468	31	4	1 503
Other building installation	11 711	3 892	1 292	16 895
Painting and decorating	1 985	183	189	2 357
Other building completion	12 310	531	351	13 192
Renting of construction or demolition equipment with operators	6 996	678	1 688	9 362
Total	145 863	58 789	44 487	249 139

Table 18 – Income from services rendered by province in the construction industry, 2007 and 2011

Province	R million		% contribution to total income from services		Annualised % change
	2007	2011	2007	2011	
Gauteng	77 340	100 559	47,6	40,4	6,8
KwaZulu-Natal	17 179	27 980	10,6	11,2	13,0
Eastern Cape	11 013	17 043	6,8	6,8	11,5
Free State	5 048	10 935	3,1	4,4	21,3
Limpopo	5 415	16 923	3,3	6,8	33,0
Mpumalanga	9 887	23 322	6,1	9,4	23,9
Northern Cape	2 889	6 814	1,8	2,7	23,9
Western Cape	25 982	34 118	16,0	13,7	7,0
North West	7 848	11 445	4,8	4,6	9,9
Total	162 601	249 139	100,0	100,0	11,3

Table 19 – Information and communication technology usage in the construction industry as at the end of June 2011

Type of service	Use computer	Use internet	Use internet banking	Have web page	Receive orders over internet	Place orders over internet	IT outsourced
	%						
Site preparation	100,0	98,0	96,0	38,0	22,0	26,0	58,0
Construction of buildings	99,8	98,9	92,4	41,5	19,4	24,0	58,1
Construction of civil engineering structures	100,0	97,7	91,5	41,8	22,7	28,9	56,8
Construction of other structures	100,0	97,9	89,6	45,8	37,5	37,5	47,9
Construction by specialist trade contractors	100,0	100,0	95,9	46,9	22,4	23,5	53,1
Plumbing	100,0	93,9	89,4	27,3	28,8	25,8	43,9
Electrical contractors	100,0	97,1	89,5	35,7	29,8	33,3	53,8
Shopfitting	100,0	96,2	80,8	46,2	15,4	26,9	57,7
Other building installation	100,0	98,4	91,1	56,5	24,6	30,4	55,0
Painting and decorating	100,0	98,0	89,8	53,1	32,7	22,4	63,3
Other building completion	100,0	95,8	90,3	41,7	34,7	37,5	54,2
Renting of construction or demolition equipment with operators	100,0	96,8	90,4	31,2	15,2	16,8	52,0
Total	99,9	97,6	91,2	41,1	25,9	29,0	55,3

Table 20 – Information and communication technology usage in the construction industry by size group as at the end of June 2011

Size group	Use computer	Use internet	Use internet banking	Have web page	Receive orders over internet	Place orders over internet	IT outsourced
	%						
Large enterprises	100,0	98,9	92,5	61,8	18,7	26,0	62,9
Medium enterprises	100,0	97,8	91,3	34,4	25,3	27,8	53,9
Small enterprises	100,0	100,0	93,3	22,2	20,0	17,8	53,3
Micro enterprises	98,5	89,6	85,1	13,4	25,4	28,4	25,4
Total	98,7	91,1	86,2	16,7	24,8	27,6	30,2

Explanatory notes

Background

The results presented in this publication have been derived from the 2011 Construction industry large sample survey. This is a periodic survey, which measures economic activity in the construction industry of the South African economy. This survey is based on a sample of private and public enterprises operating in the construction industry.

The sample was drawn from Stats SA's business register. Stats SA continuously updates its business register, based on units registered for value added tax (VAT) and income tax (IT) at the South African Revenue Service (SARS).

The previous survey of the construction industry, namely 'Construction industry, 2007' was conducted for the year 2007.

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 2010 and 30 June 2011.

Purpose of the survey

Results of the survey are used within Stats SA for compiling South Africa's national accounts, e.g. the gross domestic product (GDP) and gross fixed capital formation. These statistics are also used by the private sector in analyses of comparative business and industry performance.

Scope and coverage

This survey covers the following value added tax (VAT) and income tax (IT) registered private and public enterprises that are mainly engaged in construction:

- Site preparation (SIC 5010);
- Construction of buildings (SIC 5021);
- Construction of civil engineering structures (SIC 5022);
- Construction of other structures (SIC 5023);
- Construction by specialist trade contractors (SIC 5024);
- Plumbing (SIC 5031);
- Electrical contractors (SIC 5032);
- Shopfitting (SIC 5033);
- Other building installation (SIC 5039);
- Painting and decorating (SIC 5041);
- Other building completion (SIC 5049); and
- Renting of construction or demolition equipment with operators (SIC 5050).

Classification by industry

The 1993 edition of the *Standard Industrial Classification of all Economic Activities* (SIC), Fifth Edition, Report No. 09-09-02, was used to classify the statistical units in the survey. The SIC is based on the 1990 *International Standard Industrial Classification of all Economic Activities* (ISIC) with suitable adaptations for local conditions. Statistics in this publication are presented at 4-digit SIC level (group). Each enterprise is classified to an industry which reflects its predominant activity.

Statistical unit

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.

Size groups

The enterprises are divided into four size groups according to the value of their business register turnover. Large enterprises are enterprises with an annual turnover of R52 million and more. Table 21 presents the size groups as defined using the Department of Trade and Industry (DTI) cut-off points.

Table 21 – Size groups for the construction industry, 2011

Size Group	Turnover
Large	≥ R52 000 000
Medium	R12 000 000 ≤ VAT turnover < R52 000 000
Small	R6 000 000 ≤ VAT turnover < R12 000 000
Micro	< R6 000 000

Survey methodology and design

The survey was conducted by post, e-mail, fax, telephone and personal visits.

A sample of approximately 4 000 enterprises was drawn using stratified simple random sampling. The enterprises were first stratified at 4-digit level according to the SIC and then by size of enterprise. All large enterprises were completely enumerated. Business register turnover was used as the measure of size for stratification. The collection rate was 82,7%.

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 group estimates. These procedures, which are in line with international best practice, are described in more detail on the Stats SA website at www.statssa.gov.za/publications/publicationsearch.asp.

Relative standard error

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

Table 22 – Income in the ‘construction’ industry within 95% confidence limit: 2011

Type of service	Lower limit	Total income	Upper limit	Relative standard error (RSE)
	R million			%
Site preparation	8 746	8 903	9 060	0,9
Construction of buildings	66 000	68 553	71 106	1,9
Construction of civil engineering structures	103 644	104 670	105 696	0,5
Construction of other structures	2 455	3 046	3 637	9,9
Construction by specialist trade contractors	11 082	13 618	16 154	9,5
Plumbing	2 781	3 590	4 399	11,5
Electrical contractors	11 651	15 234	18 817	12,0
Shopfitting	1 242	1 523	1 804	9,4
Other building installation	18 802	20 402	22 002	4,0
Painting and decorating	2 025	2 569	3 113	10,8
Other building completion	12 095	14 616	17 137	8,8
Renting of construction or demolition equipment with operators	9 705	10 290	10 875	2,9
Total	260 734	267 014	273 294	1,2

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

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
0	Nil or less than half the final digit shown

Glossary

Casual employees Employees who fall neither within the 'permanent employees' category nor the 'temporary employees' category. Such employees are typically working daily or hourly.

Concentration ratio The ratio of the income of the *n* largest enterprises to the total income.

Construction worker A professional, tradesman or labourer who is directly involved in the actual construction activity.

Current assets Assets that are not expected to be turned into cash within one year during the normal course of business. They include:

- trade and other receivables;
- cash and bank;
- inventories; and
- other current assets.

Current liabilities Debts or obligations that are due within one year. They include:

- trade and other payables;
- bank overdraft; and
- other current liabilities.

Employees Persons employed by a business or organisation and who received payment (in salaries, wages, commission, piece rates or payments in kind) for the last pay period ended on or before 30 June 2011.

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

Equity The residual interest in the entity's assets after deducting its liabilities.

Income from rental, leasing and hiring Includes:

Income from rental and leasing of land, buildings and other structures and income from leasing and hiring of motor vehicles, other transport equipment, plant, machinery and equipment.

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*, Fifth Edition, Report No. 09-90-02 of January 1993 (SIC).

Net profit or loss after tax	<p>Net profit or loss after tax is derived as:</p> <p>Net profit or loss before tax <i>minus</i> company tax</p>
Net profit or loss before tax	<p>Net profit or loss before tax is derived as:</p> <p>Total income <i>plus</i> closing inventories <i>minus</i> total expenditure <i>minus</i> opening inventories</p>
Non-current assets	<p>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"> • property, plant and equipment and intangible assets; • long-term investments; and • other non-current assets.
Non-current liabilities	<p>Liabilities not due to be paid within one year during the normal course of business. They include:</p> <ul style="list-style-type: none"> • long-term loans; and • other non-current liabilities.
Other building installations	<p>Includes:</p> <p>Other building installation n.e.c. such as the installation of heating and air-conditioning systems, antennas, alarm systems, elevators and escalators. Also included are insulation work (water, heat, sound), industrial process piping work, commercial refrigeration work, the installation of illumination and signalling systems for roads, railways, airports, harbours, e.t.c. and the installation of certain plants such as manufacturing plants, electric power and transformer plants, telecommunication and radar plants, etc.</p>
Other building completion	<p>Includes:</p> <p>Other building completion activities such as glazing, floor and wall tiling, carpet laying, floor sanding, finish carpentry, acoustical work, the cleaning of exteriors, etc.</p>

Other expenditure	<p>Includes:</p> <p>Accommodation; advertising; amortisation, <i>excluding depreciation</i>; bank charges; bursaries for own employees (staff bursaries); containers and packaging materials; computer expenditure (when not part of non-current assets); donations, sponsorships and social investment for <i>non-employees</i>; entertainment; excise and customs duty; losses on foreign exchange as a result of variations in foreign exchange rates; losses on financial and other liabilities: redemption, liquidation or revaluation; mineral rights leases; paper, printing and stationery; postal and courier services; property taxes paid; provisions; railage and transport-out; research and development; royalties, franchise fees, copyright, trade names, trademarks and patent rights paid; security services; severance, termination and redundancy payments; skills development levy; staff training; subscriptions; travelling; water and electricity; payments to labour brokers and other expenditure.</p>
Other income	<p>Includes:</p> <p>Capital transfers received (only from the South African government); customs duty received; dividends received; excise duty received; mineral rights leases; net profit on foreign loans as a result of variations in foreign exchange rates; royalties, franchise fees, copyright, trade names and patent rights received; profit on financial and other liabilities: redemption, liquidation and revaluation of liabilities; provisions; government subsidies and incentives received (only from the South African government); and other income.</p> <p>Employees appointed on an open-ended contract with no stipulated termination date or fixed-term contract for periods of more than one year.</p>
Permanent employees	
Profit margin	<p>Profit margin is derived as: Net profit or loss after tax <i>divided by</i> turnover <i>multiplied by</i> 100</p>
Statistical unit	<p>A unit about which statistics are tabulated, compiled or published. The statistical units are derived from and linked to the South African Revenue Service (SARS) administrative data.</p>
Stratum	<p>A stratum is constructed by concatenating the SIC classification and size group variables.</p>
Subcontractors	<p>A subcontractor is a person who is hired by a general contractor (or prime contractor, or main contractor) to perform a specific task as part of the overall project and is normally paid for services provided to the project by the originating general contractor.</p>
Temporary employees	<p>Employees appointed on a short-term contract basis with a stipulated termination date for periods not exceeding one year.</p>

Turnover	<p>Turnover includes:</p> <ul style="list-style-type: none"> • the value of sales; • amounts received for work done; • amounts received for services rendered; • rent and or lease payments received for land and buildings; and • rent, leasing and hiring received for machinery, vehicles and other equipment. <p>Turnover excludes:</p> <ul style="list-style-type: none"> • value added tax (VAT); • net profit or loss on sales or revaluation of fixed assets (including profit or loss on foreign exchange); • export freight charges; • interest received; and • excise duty.
Working proprietors	Owners, members or partners actively engaged in the work of the enterprise, excluding silent or inactive partners whose principal activity is outside of the enterprise.
Zero values	All rand values less than R500 000.