

# Motor trade industry, 2009

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## Motor trade industry, 2009

### 1. Introduction

This publication presents estimates in respect of the 2009 motor trade large sample survey (LSS). The 2009 motor trade LSS collected data from a sample of approximately 3 000 enterprises drawn from a sampling frame of about 19 000 which were operating between 1 July 2008 and 30 June 2009. The sample was stratified in such a way that all large enterprises (those with turnover equal to or greater than R39 million) were included. The data for the number of employees were provided for the last pay period ended on or before 30 June 2009. Data were collected at the 4-digit SIC level of classification of enterprises.

The previous motor trade LSS was conducted in 2006 (*Motor trade industry, 2006, Report No. 63-01-02(2006)*).

#### 1.1 Scope and coverage

The 2009 motor trade LSS covers enterprises registered in the taxation system 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, book value of assets, details of sales of goods, details of services rendered, information technology usage and purchases.

### 1.3 Reference period

The questionnaires were completed for the **financial year of the enterprise which ended on any date between 1 July 2008 and 30 June 2009**, according to the usual reporting schedule of the enterprise.

#### *Example*

- 1 October 2007 – 30 September 2008
- 1 January 2008 – 31 December 2008
- 1 February 2008 – 31 January 2009
- 1 March 2008 – 28 February 2009
- 1 April 2008 – 31 March 2009

### 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 errors 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. Background to the large sample surveys

The LSSs serve to document comprehensively the nature and structure of all industries within the economy.

Previously, Stats SA periodically conducted industry censuses, i.e. collections covering all entities known to be mainly engaged in particular sectors. The last industry 'census' was conducted for the manufacturing sector in 1996. Since then, Stats SA has replaced industry censuses with periodic LSSs of industry sectors. These surveys are based on larger samples than the sub-annual and annual surveys. They do not attempt to completely enumerate all entities within the industry scope of the surveys, but are based on stratified random samples which are representative of the survey population.

### 2.1 Purpose and uses of large sample surveys

The LSS results are used in constructing and refreshing supply and use tables, and for benchmarking the gross domestic product (GDP) and its components, as well as production and price indices, and annual and short-term statistical series.

Users of the LSSs include the following:

- i. Price statisticians, particularly in refreshing the commodity basket of producer price indices;
- ii. Policy advisors in government, for monitoring the performance of industries and their contribution to the South African economy and evaluating the effectiveness of industry policies;
- iii. Industry associations monitoring trends in their own and competing or complementary industries in order to inform their members of market changes; and
- iv. Individual businesses using the data to analyse their performance relative to their industry.

### 2.2 Scope and coverage

The LSSs cover enterprises registered in the taxation system (VAT and income tax) that are mainly engaged in the following industries, as defined in the Standard Industrial Classification of all Economic Activities (SIC):

- i. Mining and quarrying;
- ii. Manufacturing;
- iii. Electricity, gas and water supply;
- iv. Construction;
- v. Wholesale and retail trade, repair of motor vehicles, motor cycles and personal and household goods, and hotels and restaurants;
- vi. Transport, storage and communication;
- vii. Financial intermediation, insurance, real estate and business services; and
- viii. Community, social and personal services (except national, provincial and local government activities).

**Note:** The agriculture, forestry, fishing, hunting and related services industry (SIC 1) is not included as it is covered by a separate programme within Stats SA. Similarly, the public administration and defence activities industry (SIC 91), the financial intermediation industry (SIC 81) and insurance and pension funding industry (SIC 82) are covered by other programmes within both Stats SA and elsewhere (e.g. the South African Reserve Bank (SARB)).

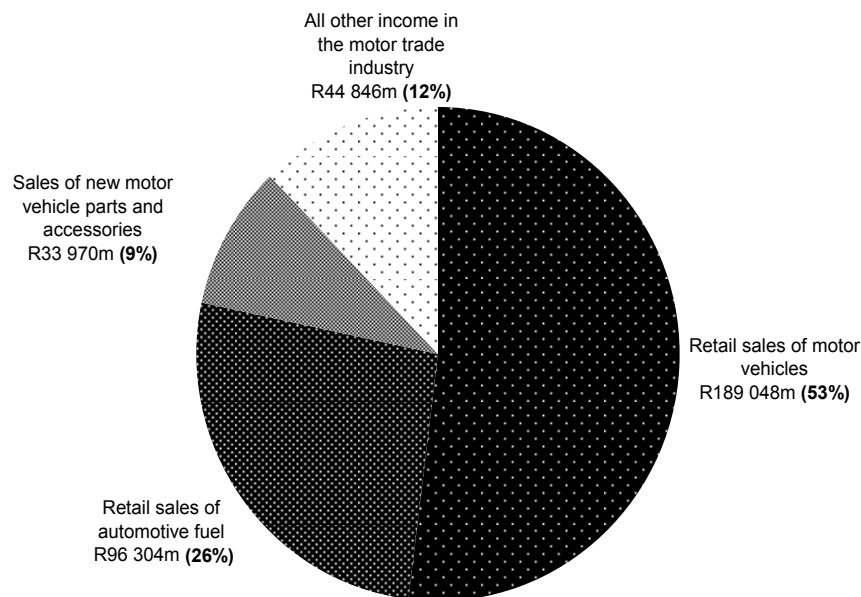
### **2.3 Reporting unit**

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.



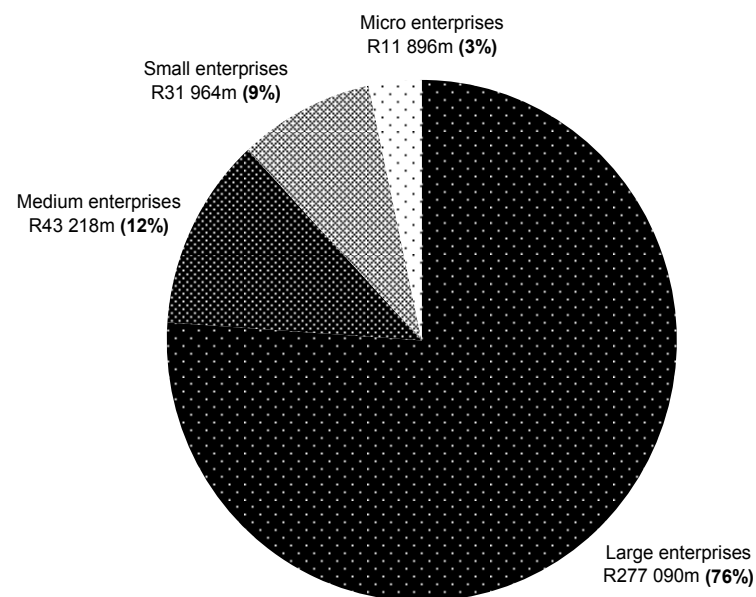
### 3. Summary of findings for the year 2009

Figure 1 – Income in the motor trade industry, 2009



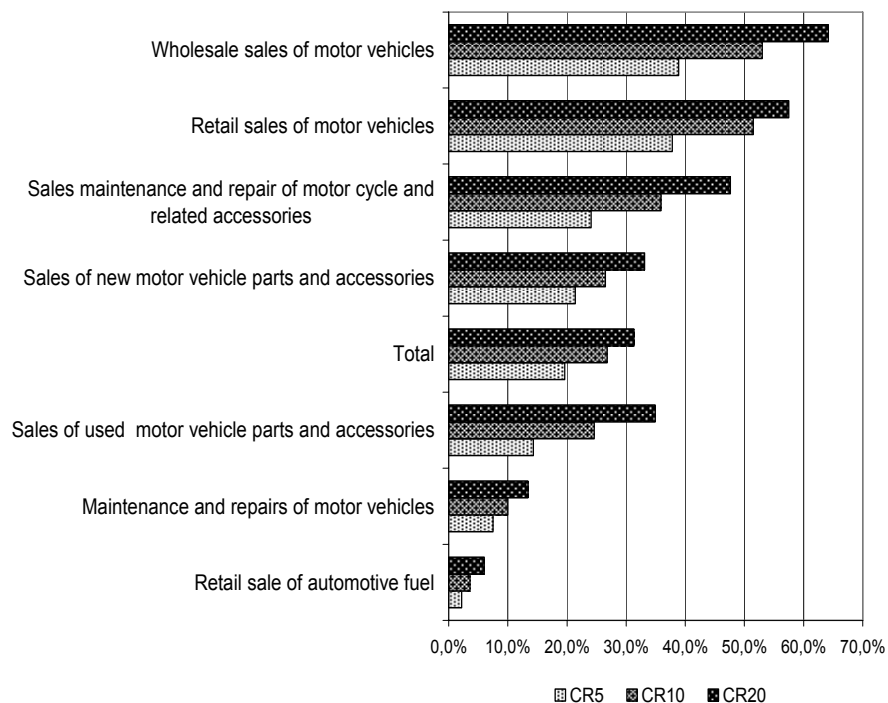
The total income for the motor trade industry in 2009 was R364 168 million. The largest contributor to the total income was 'retail sales of motor vehicles' (R189 048 million or 53%), followed by 'retail sales of automotive fuel' (R96 304 million or 26%) and 'sales of new motor vehicle parts and accessories' (R33 970 million or 9%) (Figure 1 and Table 3, page 11).

Figure 2 – Income by enterprise size in the motor trade industry, 2009

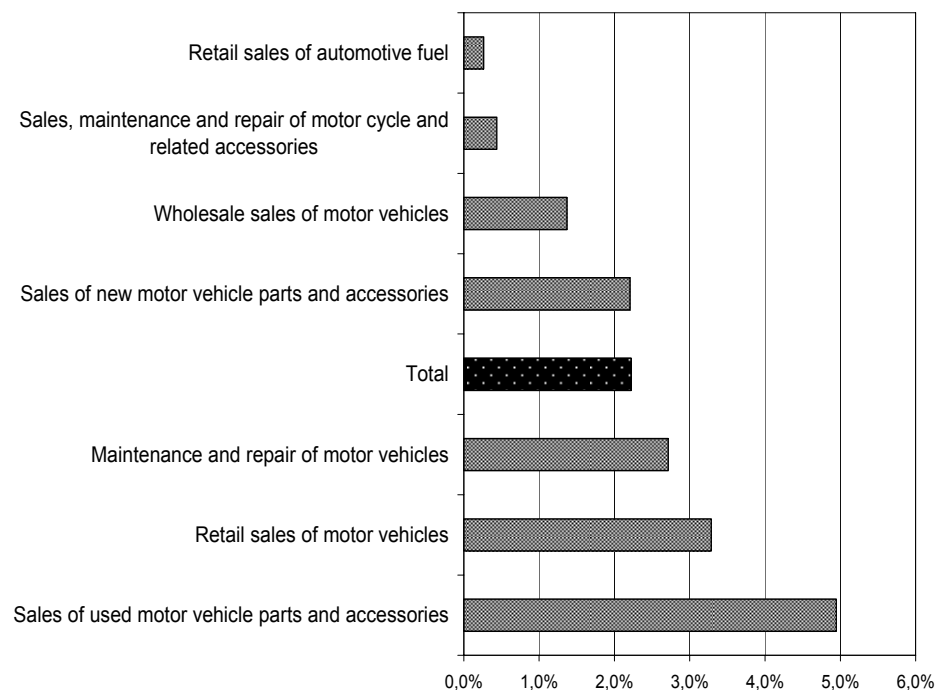


Large enterprises (those with turnover equal to or greater than R39 million) generated 76% or R277 090 million of the total income of the motor trade industry in 2009 (Figure 2 and Table 4, page 12).

**Figure 3 – Concentration ratios (CR) in the motor trade industry, 2009**



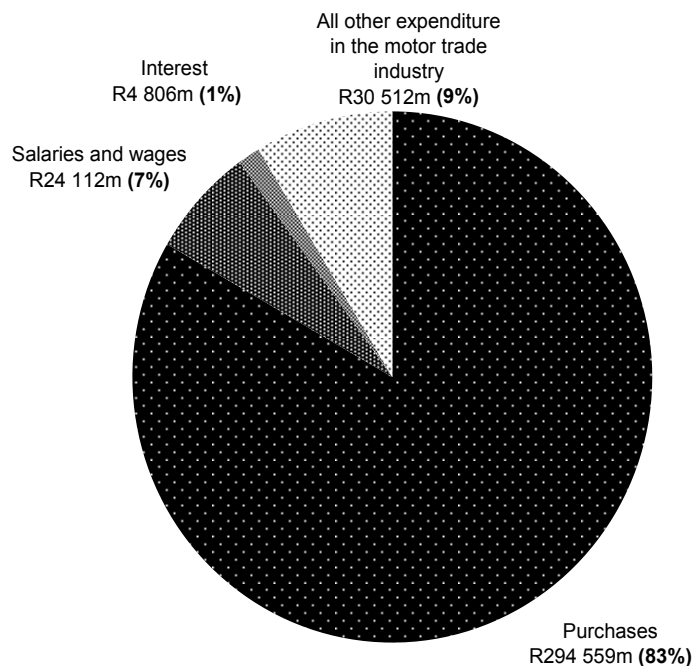
**Figure 4 – Profit margin in the motor trade industry, 2009**



The 20 largest enterprises contributed 31,3% to the total income of the motor trade industry in 2009. ‘Retail sales of automotive fuel’ had the lowest concentration ratios in all categories (CR5 2,2%, CR10 3,6% and CR20 6,0%), while ‘wholesale of motor vehicles’ had the highest concentration ratios in all categories (CR5 38,9%, CR10 53,0% and CR20 64,2%) (Figure 3 and Table 5, page 13).

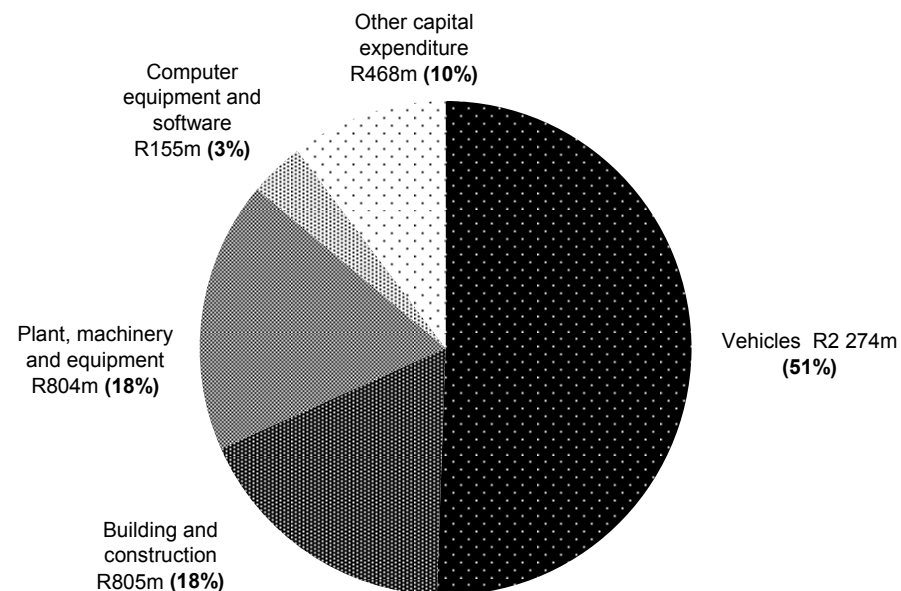
The profit margin for the motor trade industry was 2,2% in 2009. ‘Sales of used motor vehicle parts and accessories’ had the highest profit margin at 4,9%, followed by ‘retail sales of motor vehicles’ at 3,3% and ‘maintenance and repair of motor vehicles’ at 2,7% (Figure 4 and Table 2, page 10).

**Figure 5 – Composition of expenditure in the motor trade industry, 2009**



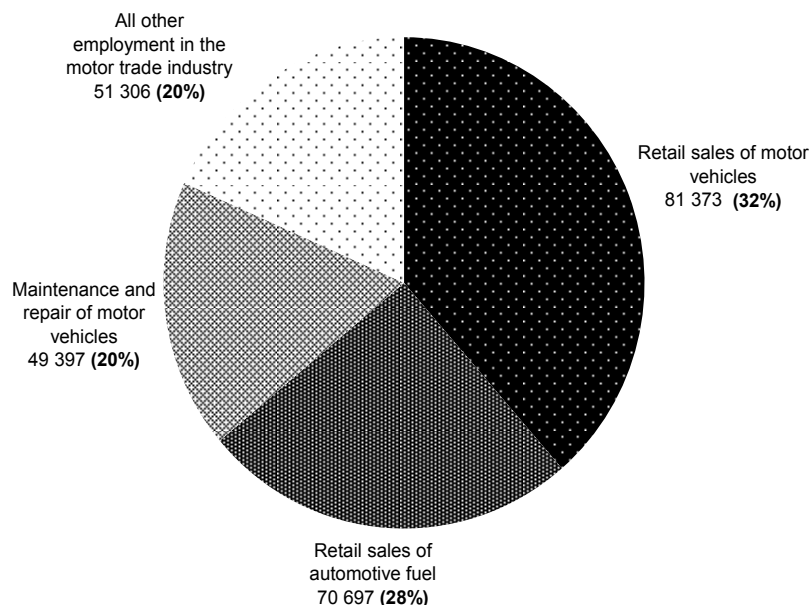
Expenditure in the motor trade industry in 2009 amounted to R353 989 million. The expenditure consisted primarily of ‘purchases’ (R294 559 million or 83%), followed by ‘salaries and wages’ (R24 112 million or 7%) and ‘interest’ (R4 806 million or 1%) (Figure 5 and Table 6, page 14-15).

**Figure 6 – Capital expenditure on new assets in the motor trade industry, 2009**



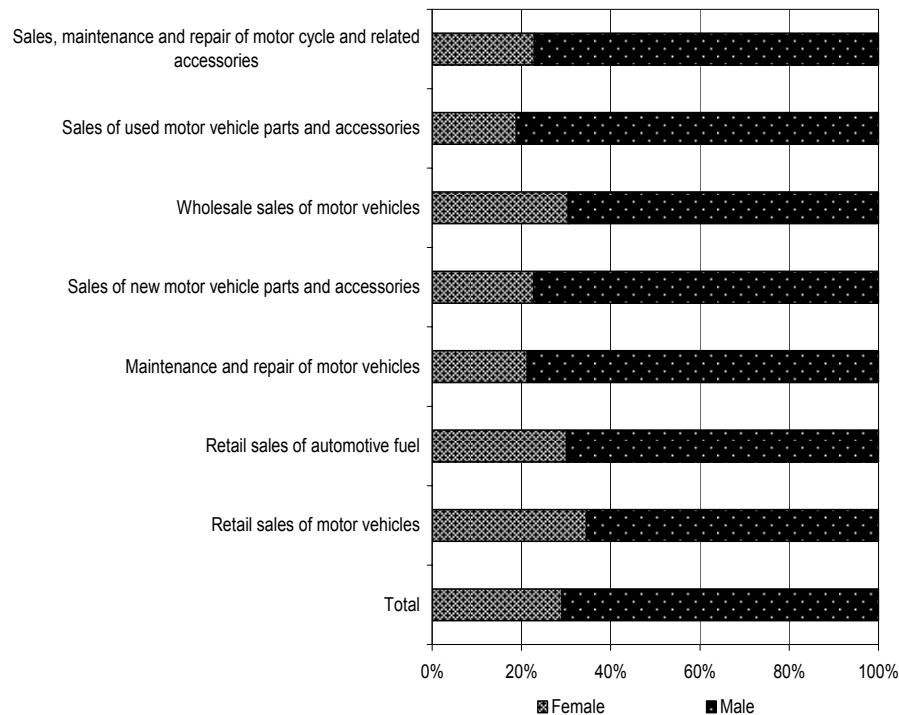
The total capital expenditure on new assets in the motor trade industry in 2009 was R4 506 million. The largest category of capital expenditure was ‘vehicles’ (R2 274 million or 51%), followed by ‘buildings and construction’ (R805 million or 18%) and ‘plant, machinery and equipment’ (R804 million or 18%) (Figure 6 and Table 10, page 19).

**Figure 7 – Employment in the motor trade industry, 2009**



The total number of persons employed in the motor trade industry as at the end of June 2009 was 252 773. 'Retail sales of motor vehicles' employed the largest number of persons (81 373 or 32%), followed by 'retail sales of automotive fuel' (70 697 or 28%) and 'maintenance and repair of motor vehicles' (49 397 or 20%) (Figure 7 and Table 11, page 20).

**Figure 8 – Gender ratios in the motor trade industry, 2009**



The proportion of females out of the total persons employed was 29% and that of males was 71%. The industry with the highest proportion of females employed was 'retail sales of motor vehicles' (35%). 'Sales of used motor vehicle parts and accessories' had the highest proportion of males employed (81%) (Figure 8 and Table 11, page 20).

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## 4. Tables

**Table 1 – Principal statistics in the motor trade industry, 2009**

Type of motor trade	Total income	Total expenditure	Total value of opening inventories	Total value of closing inventories	Net profit or loss before tax	Capital expenditure on new assets	Carrying value of fixed assets at the beginning of the financial year	Carrying value of fixed assets at the end of the financial year
	R million							
<b>Wholesale sales of motor vehicles</b>	20 624	20 668	3 416	3 915	455	65	609	547
<b>Retail sales of motor vehicles</b>	189 048	181 565	22 155	21 488	6 816	3 350	8 854	15 571
<b>Maintenance and repair of motor vehicles</b>	19 426	18 772	1 069	1 064	649	467	2 311	2 389
<b>Sales of new motor vehicle parts and accessories</b>	33 970	32 965	4 762	4 832	1 075	321	1 893	1 794
<b>Sales of used motor vehicle parts and accessories</b>	2 017	1 923	238	278	134	23	214	209
<b>Sales, maintenance and repair of motor cycles and related accessories</b>	2 779	2 797	592	637	27	8	132	112
<b>Retail sales of automotive fuel</b>	96 304	95 299	1 877	1 545	673	272	2 458	2 583
<b>Total</b>	<b>364 168</b>	<b>353 989</b>	<b>34 109</b>	<b>33 759</b>	<b>9 829</b>	<b>4 506</b>	<b>16 471</b>	<b>23 205</b>

**Table 2 – Profit margin in the motor trade industry, 2009**

Type of motor trade	Wholesale sales of motor vehicles	Retail sales of motor vehicles	Maintenance and repair of motor vehicles	Sales of new motor vehicle parts and accessories	Sales of used motor vehicle parts and accessories	Sales, maintenance and repair of motor cycles and related accessories	Retail sales of automotive fuel	Total
	R million							
<b>Net profit or loss after tax (R million)</b>	279	6 059	514	732	98	12	253	<b>7 947</b>
<b>Turnover (R million)</b>	20 388	184 443	18 938	33 190	1 982	2 734	96 045	<b>357 720</b>
<b>Profit margin<sup>1</sup> (%)</b>	1,4	3,3	2,7	2,2	4,9	0,4	0,3	<b>2,2</b>

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

**Table 3 – Income in the motor trade industry, 2009**

Type of motor trade	Sales	Services	Interest	Leasing income	Other income	Total income
	R million					
Wholesale sales of motor vehicles	19 725	647	76	16	160	20 624
Retail sales of motor vehicles	166 170	16 891	1 485	1 382	3 120	189 048
Maintenance and repair of motor vehicles	4 075	14 799	68	64	420	19 426
Sales of new motor vehicle parts and accessories	31 034	2 058	284	98	496	33 970
Sales of used motor vehicle parts and accessories	1 796	184	29	2	6	2 017
Sales, maintenance and repair of motor cycles and related accessories	2 555	176	8	3	37	2 779
Retail sales of automotive fuel	94 105	1 468	69	472	190	96 304
<b>Total</b>	<b>319 460</b>	<b>36 223</b>	<b>2 019</b>	<b>2 037</b>	<b>4 429</b>	<b>364 168</b>

**Table 4 – Income by enterprise size in the motor trade industry, 2009**

Type of motor trade	Large enterprises	Medium enterprises	Small enterprises	Micro enterprises	Total
	R million				
Wholesale sales of motor vehicles	15 890	1 764	2 437	533	20 624
Retail sales of motor vehicles	177 636	4 977	5 384	1 051	189 048
Maintenance and repair of motor vehicles	3 834	2 850	7 168	5 574	19 426
Sales of new motor vehicle parts and accessories	19 353	4 406	7 206	3 005	33 970
Sales of used motor vehicle parts and accessories	381	755	509	372	2 017
Sales, maintenance and repair of motor cycles and related accessories	1 137	783	664	195	2 779
Retail sales of automotive fuel	58 859	27 683	8 596	1 166	96 304
<b>Total</b>	<b>277 090</b>	<b>43 218</b>	<b>31 964</b>	<b>11 896</b>	<b>364 168</b>



**Table 5 – Concentration ratios in the motor trade industry, 2009**

Type of motor trade		Wholesale sales of motor vehicles	Retail sales of motor vehicles	Maintenance and repairs of motor vehicles	Sales of new motor vehicle parts and accessories	Sales of used motor vehicle parts and accessories	Sales, maintenance and repair of motor cycles and related accessories	Retail sale of automotive fuel	Total
<b>Total income</b>	R million	20 624	189 048	19 426	33 970	2 017	2 779	96 304	<b>364 186</b>
<b>Income of the 5 largest enterprises</b>		8 016	71 528	1 463	7 268	288	669	2 108	<b>71 528<sup>1</sup></b>
<b>Relative contribution of the 5 largest enterprises</b>	%	38,9	37,8	7,5	21,4	14,3	24,1	2,2	<b>19,6</b>
<b>Income of the 10 largest enterprises</b>	R million	10 935	97 363	1 934	8 980	497	998	3 444	<b>97 686<sup>1</sup></b>
<b>Relative contribution of the 10 largest enterprises</b>	%	53,0	51,5	10,0	26,5	24,6	35,9	3,6	<b>26,8</b>
<b>Income of the 20 largest enterprises</b>	R million	13 241	108 634	2 609	11 233	703	1 322	5 740	<b>114 088<sup>1</sup></b>
<b>Relative contribution of the 20 largest enterprises</b>	%	64,2	57,5	13,4	33,1	34,9	47,6	6,0	<b>31,3</b>

<sup>1</sup> These figures reflect the income of the 5 (respectively 10 and 20) largest enterprises, and not the row totals.

**Table 6 – Expenditure in the motor trade industry, 2009**

Type of motor trade	Purchases	Salaries and wages	Interest	Rental of land	Depreciation	Motor vehicle running expenditure	Advertising	Losses on foreign exchange
	R million							
Wholesale sales of motor vehicles	17 382	860	222	171	75	95	161	25
Retail sales of motor vehicles	150 338	11 509	3 796	1 915	1 814	749	697	1 498
Maintenance and repair of motor vehicles	11 239	3 851	164	429	418	338	61	7
Sales of new motor vehicle parts and accessories	25 067	3 518	368	484	322	461	131	34
Sales of used motor vehicle parts and accessories	1 302	305	18	27	27	32	12	0
Sales, maintenance and repair of motor cycles and related accessories	2 237	233	24	39	17	16	33	2
Retail sales of automotive fuel	86 994	3 836	214	847	215	114	67	0
<b>Total</b>	<b>294 559</b>	<b>24 112</b>	<b>4 806</b>	<b>3 912</b>	<b>2 888</b>	<b>1 805</b>	<b>1 162</b>	<b>1 566</b>

**Table 6 – Expenditure in the motor trade industry, 2009 (concluded)**

Type of motor trade	Bank charges	Insurance	Operational leasing and hiring of plant, machinery equipment	Repair and maintenance	Total telecommunication services	Other expenditure	Total expenditure
	R million						
Wholesale sales of motor vehicles	23	39	35	25	35	1 520	<b>20 668</b>
Retail sales of motor vehicles	184	411	417	318	448	7 471	<b>181 565</b>
Maintenance and repair of motor vehicles	105	237	134	146	206	1 437	<b>18 772</b>
Sales of new motor vehicle parts and accessories	140	189	146	99	197	1 809	<b>32 965</b>
Sales of used motor vehicle parts and accessories	12	18	22	17	22	109	<b>1 923</b>
Sales, maintenance and repair of motor cycles and related accessories	15	15	10	9	14	133	<b>2 797</b>
Retail sales of automotive fuel	271	167	160	219	151	2 044	<b>95 299</b>
<b>Total</b>	<b>750</b>	<b>1 076</b>	<b>924</b>	<b>833</b>	<b>1 073</b>	<b>14 523</b>	<b>353 989</b>

**Table 7 – Carrying value of fixed assets at the end of financial year in the motor trade industry, 2009**

Type of motor trade	Land, building and construction	Computers, network and other IT equipment	Motor vehicles and other transport equipment	Plant, machinery and other office equipment	Intangible assets	Other assets	Total carrying value
	R million						
<b>Wholesale sales of motor vehicles</b>	258	18	174	62	35	0	<b>547</b>
<b>Retail sales of motor vehicles</b>	3 791	120	7 134	2 124	1 790	612	<b>15 571</b>
<b>Maintenance and repair of motor vehicles</b>	500	78	670	707	212	222	<b>2 389</b>
<b>Sales of new motor vehicle parts and accessories</b>	587	150	564	380	104	9	<b>1 794</b>
<b>Sales of used motor vehicle parts and accessories</b>	62	2	56	73	15	1	<b>209</b>
<b>Sales, maintenance and repair of motor cycles and related accessories</b>	59	4	25	19	5	0	<b>112</b>
<b>Retail sales of automotive fuel</b>	798	49	274	367	1 080	15	<b>2 583</b>
<b>Total</b>	<b>6 055</b>	<b>421</b>	<b>8 897</b>	<b>3 732</b>	<b>3 241</b>	<b>859</b>	<b>23 205</b>

**Table 8 – Details of assets in the motor trade industry, 2009**

Type of motor trade	Current assets					Non-current assets					Total assets
	Bank	Debtors	Inventories	Other current assets	Total current assets	Fixed non-current assets	Goodwill	Long-term investment	Other non-current assets	Total non-current assets	
	R million										
<b>Wholesale sales of motor vehicles</b>	494	1 725	3 915	165	<b>6 299</b>	517	30	54	458	<b>1 059</b>	<b>7 358</b>
<b>Retail sales of motor vehicles</b>	2 469	8 469	21 488	7 537	<b>39 963</b>	13 634	1 937	8 029	3 660	<b>27 260</b>	<b>67 223</b>
<b>Maintenance and repair of motor vehicles</b>	732	1 935	1 064	210	<b>3 941</b>	2 178	211	226	397	<b>3 012</b>	<b>6 953</b>
<b>Sales of new motor vehicle parts and accessories</b>	1 096	3 557	4 832	467	<b>9 952</b>	1 602	192	416	472	<b>2 682</b>	<b>12 634</b>
<b>Sales of used motor vehicle parts and accessories</b>	136	129	278	2	<b>545</b>	195	14	32	25	<b>266</b>	<b>811</b>
<b>Sales, maintenance and repair of motor cycles and related accessories</b>	98	137	637	39	<b>911</b>	104	8	38	80	<b>230</b>	<b>1 141</b>
<b>Retail sales of automotive fuel</b>	1 087	1 192	1 545	327	<b>4 151</b>	1 536	1 047	557	480	<b>3 620</b>	<b>7 771</b>
<b>Total</b>	<b>6 112</b>	<b>17 144</b>	<b>33 759</b>	<b>8 747</b>	<b>65 762</b>	<b>19 766</b>	<b>3 439</b>	<b>9 352</b>	<b>5 572</b>	<b>38 129</b>	<b>103 891</b>

**Table 9 – Details of liabilities and equity in the motor trade industry, 2009**

Type of motor trade	Current liabilities				Non-current liabilities			Total liabilities	Owners' equity	Equity and liabilities
	Creditors	Other current liabilities	Overdraft	Total current liabilities	Long-term loans	Other non-current liabilities	Total non-current liabilities			
	R million									
<b>Wholesale sales of motor vehicles</b>	3 153	1 154	853	<b>5 160</b>	582	313	<b>895</b>	<b>6 055</b>	1 303	<b>7 358</b>
<b>Retail sales of motor vehicles</b>	17 275	15 140	1 746	<b>34 161</b>	15 185	9 737	<b>24 922</b>	<b>59 083</b>	8 140	<b>67 223</b>
<b>Maintenance and repair of motor vehicles</b>	1 723	476	332	<b>2 531</b>	1 311	666	<b>1 977</b>	<b>4 508</b>	2 445	<b>6 953</b>
<b>Sales of new motor vehicle parts and accessories</b>	4 062	1 385	790	<b>6 237</b>	1 818	634	<b>2 452</b>	<b>8 689</b>	3 945	<b>12 634</b>
<b>Sales of used motor vehicle parts and accessories</b>	205	38	37	<b>280</b>	122	119	<b>241</b>	<b>521</b>	290	<b>811</b>
<b>Sales, maintenance and repair of motor cycles and related accessories</b>	341	35	85	<b>461</b>	178	131	<b>309</b>	<b>770</b>	371	<b>1 141</b>
<b>Retail sales of automotive fuel</b>	1 490	653	559	<b>2 702</b>	1 925	606	<b>2 531</b>	<b>5 233</b>	2 538	<b>7 771</b>
<b>Total</b>	<b>28 249</b>	<b>18 881</b>	<b>4 402</b>	<b>51 532</b>	<b>21 121</b>	<b>12 206</b>	<b>33 327</b>	<b>84 859</b>	<b>19 032</b>	<b>103 891</b>

**Table 10 – Capital expenditure on new assets in the motor trade industry, 2009**

Type of motor trade	Buildings and construction	Computer equipment and software	Vehicles	Plant, machinery and equipment	Other capital expenditure	Total capital expenditure on new assets
	R million					
Wholesale sales of motor vehicles	14	3	18	19	11	65
Retail sales of motor vehicles	675	74	1 866	459	276	3 350
Maintenance and repair of motor vehicles	69	22	197	131	48	467
Sales of new motor vehicle parts and accessories	37	46	89	90	59	321
Sales of used motor vehicle parts and accessories	0	2	16	5	0	23
Sales, maintenance and repair of motor cycles and related accessories	0	1	5	2	0	8
Retail sales of automotive fuel	10	7	83	98	74	272
<b>Total</b>	<b>805</b>	<b>155</b>	<b>2 274</b>	<b>804</b>	<b>468</b>	<b>4 506</b>

**Table 11 – Employment in the motor trade industry, 2009**

Type of motor trade	Permanent employees			Temporary employees			Casual employees			Total employees		
	Female	Male	Total	Female	Male	Total	Female	Male	Total	Female	Male	Total
	Number of employees											
<b>Wholesale sales of motor vehicles</b>	2 233	5 221	<b>7 454</b>	17	19	<b>36</b>	75	59	<b>134</b>	2 325	5 299	<b>7 624</b>
<b>Retail sales of motor vehicles</b>	26 283	53 735	<b>80 018</b>	219	594	<b>813</b>	183	359	<b>542</b>	26 685	54 688	<b>81 373</b>
<b>Maintenance and repair of motor vehicles</b>	10 143	36 657	<b>46 800</b>	310	1 408	<b>1 718</b>	59	820	<b>879</b>	10 512	38 885	<b>49 397</b>
<b>Sales of new motor vehicle parts and accessories</b>	7 527	27 156	<b>34 683</b>	1 107	1 874	<b>2 981</b>	73	517	<b>590</b>	8 707	29 547	<b>38 254</b>
<b>Sales of used motor vehicle parts and accessories</b>	671	2 792	<b>3 463</b>	0	22	<b>22</b>	2	83	<b>85</b>	673	2 897	<b>3 570</b>
<b>Sales, maintenance and repair of motor cycles and related accessories</b>	417	1 422	<b>1 839</b>	5	6	<b>11</b>	3	5	<b>8</b>	425	1 433	<b>1 858</b>
<b>Retail sales of automotive fuel</b>	19 447	46 412	<b>65 859</b>	1 154	1 369	<b>2 523</b>	670	1 645	<b>2 315</b>	21 271	49 426	<b>70 697</b>
<b>Total</b>	<b>66 721</b>	<b>173 395</b>	<b>240 116</b>	<b>2 812</b>	<b>5 292</b>	<b>8 104</b>	<b>1 065</b>	<b>3 488</b>	<b>4 553</b>	<b>70 598</b>	<b>182 175</b>	<b>252 773</b>



**Table 12 – Employment by enterprise size in the motor trade industry, 2009**

Type of motor trade	Large enterprises	Medium enterprises	Small enterprises	Micro enterprises	Total
	Number of employees				
Wholesale sales of motor vehicles	3 750	751	1 413	1 710	<b>7 624</b>
Retail sales of motor vehicles	72 475	2 722	4 544	1 632	<b>81 373</b>
Maintenance and repair of motor vehicles	4 793	4 891	19 365	20 348	<b>49 397</b>
Sales of new motor vehicle parts and accessories	16 671	4 839	11 095	5 649	<b>38 254</b>
Sales of used motor vehicle parts and accessories	288	1 024	1 042	1 216	<b>3 570</b>
Sales, maintenance and repair of motor cycles and related accessories	346	469	617	426	<b>1 858</b>
Retail sales of automotive fuel	36 919	21 064	8 770	3 944	<b>70 697</b>
<b>Total</b>	<b>135 242</b>	<b>35 760</b>	<b>46 846</b>	<b>34 925</b>	<b>252 773</b>

**Table 13 – Income from sales of new motor vehicles in the motor trade industry, 2009**

Type of motor trade	Cars	Minibuses	Vans	Trucks and lorries	Buses	Motor cycles	Other new vehicles	Total new vehicles
	R million							
<b>Wholesale sales of motor vehicles</b>	6 068	692	565	3 473	725	402	0	<b>11 925</b>
<b>Retail sales of motor vehicles</b>	66 811	12 326	15 696	3 996	540	402	124	<b>99 895</b>
<b>All other sales of new motor vehicles in the motor trade industry</b>	1 411	0	221	4	0	1 708	6	<b>3 350</b>
<b>Total</b>	<b>74 290</b>	<b>13 018</b>	<b>16 482</b>	<b>7 473</b>	<b>1 265</b>	<b>2 512</b>	<b>130</b>	<b>115 170</b>

**Table 14 – Units sold of used motor vehicles in the motor trade industry, 2009**

Type of motor trade	Sedans	Hatch-backs	Other cars	Minibuses	Vans	Trucks and lorries	Buses	Trailers	Caravans	Motor cycles	Other used vehicles	Total vehicles
	<b>Number</b>											
<b>Total (Used vehicles)</b>	244 837	69 495	49 257	20 291	41 154	13 104	601	6 989	3 230	7 865	11 793	<b>468 616</b>

**Table 15 – Income from sales of used motor vehicles in the motor trade industry, 2009**

Type of motor trade	Cars	Minibuses	Vans	Trucks and lorries	Buses	Motor cycles	Other used vehicles	Total used vehicles
	R million							
<b>Wholesale sales of motor vehicles</b>	2 648	16	398	1 497	83	25	33	<b>4 700</b>
<b>Retail sales of motor vehicles</b>	32 070	1 863	3 666	2 220	112	131	1 037	<b>41 099</b>
<b>All other sales of used motor vehicles in the motor trade industry</b>	1 255	34	484	74	0	335	349	<b>2 531</b>
<b>Total</b>	<b>35 973</b>	<b>1 913</b>	<b>4 548</b>	<b>3 791</b>	<b>195</b>	<b>491</b>	<b>1 419</b>	<b>48 330</b>

**Table 16 – Income from sales of tyres, parts and accessories in the motor trade industry, 2009**

Type of motor trade	New tyres and tyre accessories	Other new vehicle parts and accessories	Used tyres and tyre accessories	Other used vehicle parts and accessories	Total sales
	R million				
Wholesale sales of motor vehicles	63	1 632	0	83	1 778
Retail sales of motor vehicles	92	13 579	32	830	14 533
Maintenance and repair of motor vehicles	438	2 273	77	252	3 040
Sales of new motor vehicle parts and accessories	10 990	16 494	1 461	901	29 846
Sales of used motor vehicle parts and accessories	3	249	6	1 183	1 441
Sales, maintenance and repair of motor cycles and related accessories	51	161	0	4	216
Retail sales of automotive fuel	40	313	3	2	358
<b>Total</b>	<b>11 677</b>	<b>34 701</b>	<b>1 579</b>	<b>3 255</b>	<b>51 212</b>

**Table 17 – Income from sales of fuel in the motor trade industry, 2009**

Type of motor trade	Petrol	Diesel	Total
	R million		
Wholesale sales of motor vehicles	107	43	150
Retail sales of motor vehicles	1 893	522	2 415
Maintenance and repair of motor vehicles	111	95	206
Sales of new motor vehicle parts and accessories	87	15	102
Sales of used motor vehicle parts and accessories	0	0	0
Sales, maintenance and repair of motor cycles and related accessories	0	0	0
Retail sales of automotive fuel	58 101	21 103	79 204
<b>Total</b>	<b>60 299</b>	<b>21 778</b>	<b>82 077</b>

**Table 18 – Income from services in the motor trade industry, 2009**

Type of motor trade	Electrical repairs and electronic injection	Exhaust system fitment and repairs	Scheduled service	Tyre and tube fitment and repairs
	R million			
Wholesale sales of motor vehicles	3	2	149	1
Retail sales of motor vehicles	394	13	14 076	3
Maintenance and repair of motor vehicles	1 114	169	745	287
Sales of new motor vehicle parts and accessories	25	141	218	646
Sales of used motor vehicle parts and accessories	0	0	1	0
Sales, maintenance and repair of motor cycles and related accessories	0	0	55	0
Retail sales of automotive fuel	13	2	276	110
<b>Total</b>	<b>1 549</b>	<b>327</b>	<b>15 520</b>	<b>1 047</b>

**Table 18 – Income from services in the motor trade industry, 2009 (concluded)**

Type of motor trade	Installing of parts and accessories	Towing and roadside assistance	Wheel balancing and alignment	Other services	Total services
	R million				
Wholesale sales of motor vehicles	7	1	2	482	647
Retail sales of motor vehicles	93	23	65	2 224	16 891
Maintenance and repair of motor vehicles	525	423	96	11 440	14 799
Sales of new motor vehicle parts and accessories	90	66	326	546	2 058
Sales of used motor vehicle parts and accessories	0	13	0	170	184
Sales, maintenance and repair of motor cycles and related accessories	1	0	0	120	176
Retail sales of automotive fuel	376	7	64	620	1 468
<b>Total</b>	<b>1 092</b>	<b>533</b>	<b>553</b>	<b>15 602</b>	<b>36 223</b>



**Table 19 – Purchases of new motor vehicles in the motor trade industry, 2009**

Type of motor trade	Cars	Minibuses	Vans	Trucks and lorries	Buses	Motor cycles	Other vehicles	Total new vehicles
	R million							
<b>Wholesale sales of motor vehicles</b>	6 374	477	669	2 369	24	306	70	<b>10 289</b>
<b>Retail sales of motor vehicles</b>	57 473	9 341	13 613	6 778	90	308	251	<b>87 854</b>
<b>Maintenance and repair of motor vehicles</b>	254	0	88	0	0	31	1	<b>374</b>
<b>Sales of new motor vehicle parts and accessories</b>	32	0	15	0	0	0	172	<b>219</b>
<b>Sales of used motor vehicle parts and accessories</b>	1	0	1	0	0	0	2	<b>4</b>
<b>Sales, maintenance and repair of motor cycles and related accessories</b>	0	0	1	0	0	1 580	0	<b>1 581</b>
<b>Retail sales of automotive fuel</b>	1 183	0	175	4	0	0	25	<b>1 387</b>
<b>Total</b>	<b>65 317</b>	<b>9 818</b>	<b>14 562</b>	<b>9 151</b>	<b>114</b>	<b>2 225</b>	<b>521</b>	<b>101 708</b>

**Table 20 – Purchases of used motor vehicles in the motor trade industry, 2009**

Type of motor trade	Cars	Minibuses	Vans	Trucks and lorries	Buses	Motor cycles	Other used vehicles	Total used vehicles
	R million							
Wholesale sales of motor vehicles	3 518	17	462	1 704	56	24	2	5 783
Retail sales of motor vehicles	32 118	1 735	4 502	6 256	107	126	1 106	45 950
Maintenance and repair of motor vehicles	202	13	121	64	0	9	0	409
Sales of new motor vehicle parts and accessories	24	0	11	0	0	0	2	37
Sales of used motor vehicle parts and accessories	159	12	71	37	0	1	1	281
Sales, maintenance and repair of motor cycles and related accessories	21	0	1	0	0	286	0	308
Retail sales of automotive fuel	1 505	0	211	0	0	1	16	1 733
<b>Total</b>	<b>37 547</b>	<b>1 777</b>	<b>5 379</b>	<b>8 061</b>	<b>163</b>	<b>446</b>	<b>1 127</b>	<b>54 501</b>

**Table 21 – Purchases of tyres, parts and accessories in the motor trade industry, 2009**

Type of motor trade	New tyres and tyre accessories	Other new vehicle parts and accessories	Used tyres and tyre accessories	Other used vehicle parts and accessories	Total
	R million				
Wholesale sales of motor vehicles	65	402	0	90	557
Retail sales of motor vehicles	100	1 650	33	713	2 496
Maintenance and repair of motor vehicles	397	678	237	853	2 165
Sales of new motor vehicle parts and accessories	10 433	3 814	1 057	513	15 817
Sales of used motor vehicle parts and accessories	1	3	3	858	865
Sales, maintenance and repair of motor cycles and related accessories	63	75	0	4	142
Retail sales of automotive fuel	279	108	4	34	425
<b>Total</b>	<b>11 338</b>	<b>6 730</b>	<b>1 334</b>	<b>3 065</b>	<b>22 467</b>

**Table 22 – Purchases of fuel in the motor trade industry, 2009**

Type of motor trade	Petrol	Diesel	Total
	R million		
Wholesale sales of motor vehicles	176	53	229
Retail sales of motor vehicles	2 294	612	2 906
Maintenance and repair of motor vehicles	157	176	333
Sales of new motor vehicle parts and accessories	78	30	108
Sales of used motor vehicle parts and accessories	0	0	0
Sales, maintenance and repair of motor cycles and related accessories	0	0	0
Retail sales of automotive fuel	58 311	15 220	73 531
<b>Total</b>	<b>61 016</b>	<b>16 091</b>	<b>77 107</b>

**Table 23 – Information and communication technology usage by industry in the motor trade industry, 2009**

Type of motor trade	Use computer	Use internet	Use internet banking	Have web page	Receive orders over internet	Place orders over internet	IT outsourced
	%						
Wholesale sales of motor vehicles	98,1	92,5	88,7	41,5	22,6	32,1	43,4
Retail sales of motor vehicles	98,9	97,0	89,1	41,1	21,6	29,3	51,3
Maintenance and repair of motor vehicles	97,9	93,2	88,2	20,7	42,6	18,2	40,0
Sales of new motor vehicle parts and accessories	98,6	94,7	85,2	33,5	22,0	23,9	43,1
Sales of used motor vehicle parts and accessories	95,2	90,5	83,3	31,0	19,0	16,7	38,1
Sales, maintenance and repair of motor cycles and related accessories	97,6	92,7	90,2	58,5	46,3	36,6	43,9
Retail sales of automotive fuel	99,3	94,3	88,1	4,5	9,4	23,3	31,4
<b>Total</b>	<b>98,7</b>	<b>94,7</b>	<b>88,1</b>	<b>22,9</b>	<b>19,1</b>	<b>24,6</b>	<b>40,1</b>

## Explanatory notes

<b>Background</b>	<p>The results presented in this publication have been derived from the 2009 motor trade large sample survey. This is a periodic survey, which measures economic activity in the motor trade industry of the South African economy. This survey is based on a sample of private and public enterprises operating in the motor trade industry.</p> <p>The sample was drawn from Stats SA's business register. Stats SA continuously upgrades its business register, based on units registered for value added tax (VAT) and income tax (IT) at the South African Revenue Service (SARS).</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 2008 and 30 June 2009.</p>
<b>Purpose of the survey</b>	<p>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.</p>
<b>Scope and coverage</b>	<p>This survey covers the following income tax-registered private and public enterprises that are mainly engaged in the motor trade industry:</p> <ul style="list-style-type: none"><li>○ Wholesale sales of motor vehicles (SIC 6311)</li><li>○ Retail sales of motor vehicles (SIC 6312)</li><li>○ Maintenance and repair of motor vehicles (SIC 6320)</li><li>○ Sale of new motor vehicle parts and accessories (SIC 6331)</li><li>○ Sale of used motor vehicle parts and accessories (SIC 6332)</li><li>○ Sale, maintenance and repair of motor cycles and related parts and accessories (SIC 6340)</li><li>○ Retail sales of automotive fuel (SIC 6350)</li></ul>
<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. Each enterprise is classified to an industry which reflects its predominant activity. Statistics in this publication are presented at SIC group (four-digit) level.</p>

**Statistical unit** The statistical unit for the collection of the information is known as an enterprise. An enterprise is a legal unit (or combination of legal units) that includes and directly controls all functions necessary to carry out its 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 R39 million and more. Table 24 presents the size groups defined using the Department of Trade and Industry (DTI) cut-off points.

**Table 24 – Size groups for the motor trade industry**

Size group	Turnover
Large	≥ R39 000 000
Medium	R19 000 000 ≤ VAT Turnover < R39 000 000
Small	R4 000 000 ≤ VAT Turnover < R19 000 000
Micro	≤ R4 000 000

**Survey methodology and design** The survey was conducted by post, email, fax, telephone and personal visits.

A sample of approximately 3 000 enterprises was drawn from a frame of about 19 000 using stratified simple random sampling. The enterprises were first stratified at four-digit level according to the SIC and then by size of enterprise. All large enterprises are completely enumerated. Business register turnover was used as the measure of size for stratification.

**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 are calculated and then aggregated with the completely enumerated stratum to form industry 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](http://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 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 as only a sample of enterprises was used. The relative standard error (RSE) provides an immediate indication of the percentage errors likely to have occurred due to sampling, and thus avoids the need to refer to the size of the estimate.

**Table 25 – Income in the motor trade industry within 95% confidence limits, 2009**

Type of motor trade	Lower limit	Total income	Upper limit	Relative Standard error
	R million			%
Wholesale sales of motor vehicles	19 088	20 624	22 160	3,8
Retail sales of motor vehicles	186 084	189 048	192 012	0,8
Maintenance and repairs of motor vehicles	18 360	19 426	20 492	2,8
Sales of new motor vehicle parts and accessories	32 305	33 970	35 635	2,5
Sales of used motor vehicle parts and accessories	1 788	2 017	2 246	5,8
Sales, maintenance and repair of motor cycles and related accessories	2 485	2 779	3 073	5,4
Retail sale of automotive fuel	90 075	96 304	102 533	3,3
<b>Total</b>	<b>350 606</b>	<b>364 168</b>	<b>377 730</b>	<b>1,9</b>

**Non-sampling errors**

Inaccuracies might 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**

Where necessary, the figures in the tables have been rounded off to the nearest final digit shown. There might therefore be slight discrepancies between the sums of the constituent items of the totals shown.



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<b>Abbreviations</b>	BR	Business register
	CR	Concentration ratio
	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

<b>Casual employees</b>	Employees who fall neither within the ‘permanent employees’ category nor the ‘temporary employees’ category. Such employees are typically working daily or hourly.
<b>Concentration ratio</b>	The ratio of the income of the <i>n</i> largest enterprises to the total income.
<b>Current assets</b>	Assets that are expected to be turned into cash within one year during the normal course of business. 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>	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>Employees</b>	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 2009.
<b>Enterprise</b>	A legal entity or a combination of legal units that includes and directly controls all functions necessary to carry out its activities.
<b>Equity</b>	The residual interest in the entity’s assets after deducting its liabilities.
<b>Income from rental, leasing and hiring</b>	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.
<b>Industry</b>	An industry consists of a group of enterprises engaged in the same or similar kinds of economic activity. Industries are defined in the <i>System of National Accounts (SNA)</i> in the same way as in the <i>Standard Industrial Classification of all Economic Activities, Fifth Edition, Report No. 09-90-02 of January 1993 (SIC)</i> .
<b>Net profit or loss after tax</b>	Net profit or loss after tax is derived as:  Net profit or loss before tax <b>minus</b> company tax

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<b>Net profit or loss before tax</b>	Net profit or loss before tax is derived as:  Total income <b>plus</b> closing inventories <b>minus</b> total expenditure <b>minus</b> opening inventories
<b>Non-current assets</b>	Assets which are not easily convertible to cash or not expected to become cash within the next year. They include: <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>	Liabilities not due to be paid within one year during the normal course of business. They include: <ul style="list-style-type: none"><li>○ long-term loans; and</li><li>○ other non-current liabilities.</li></ul>
<b>Other expenditure</b>	Includes:  Bursaries for own employees (staff bursaries); containers and packaging materials; 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; property taxes paid; research and development; severance, termination and redundancy payments; and skills development levy.
<b>Other income</b>	Includes:  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.
<b>Permanent employees</b>	Employees appointed on an open-ended contract with no stipulated termination date or fixed-term contract for periods of more than one year.
<b>Profit margin</b>	Profit margin is derived as: Net profit or loss after tax <b>divided by</b> turnover <b>multiplied by</b> 100
<b>Statistical unit</b>	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.

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<b>Stratum</b>	A stratum is constructed by concatenating the SIC classification and size group variables.
<b>Subcontractors</b>	Include labour brokers.
<b>Temporary employees</b>	Employees appointed on a short-term contract basis with a stipulated termination date for periods not exceeding one year.
<b>Turnover</b>	<p>Turnover includes:</p> <ul style="list-style-type: none"><li>○ the value of sales;</li><li>○ amounts received for work done;</li><li>○ amounts received for services rendered;</li><li>○ rent and or lease payments received for land and buildings; and</li><li>○ rent, leasing and hiring received for machinery, vehicles and other equipment.</li></ul> <p>Turnover excludes:</p> <ul style="list-style-type: none"><li>○ value added tax (VAT);</li><li>○ net profit or loss on sales or revaluation of fixed assets (including profit or loss on foreign exchange);</li><li>○ export freight charges;</li><li>○ interest received; and</li><li>○ excise duty.</li></ul>