



stats sa

Department:
Statistics South Africa
REPUBLIC OF SOUTH AFRICA

Motor trade industry, 2018

Embargoed until:
30 September 2020

13:30

Report No. 63-01-02 (2018)

Statistics South Africa

Risenga Maluleke
Statistician-General

Dipalopalo tsa Aforikaborwa • Dipalopalo tsa Aforika Borwa • Ezazibalo zaseNingizimu Afrika • Tshitatistika Afrika Tshipembe • Tinhlayo Afrika-Dzonga

Statistieke Suid-Afrika • Dipalopalo tša Aforika Borwa • Telubalo zaseNingizimu Afrika • EzeeNkcukacha maNani zoMzantsi Afrika • limbalobalo zeSewula Afrika

IMPROVING LIVES THROUGH DATA ECOSYSTEMS



Motor trade industry, 2018 / Statistics South Africa

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

© Statistics South Africa, 2020

Users may apply or process this data, provided Statistics South Africa (Stats SA) is acknowledged as the original source of the data; that it is specified that the application and/or analysis is the result of the user's independent processing of the data; and that neither the basic data nor any reprocessed version or application thereof may be sold or offered for sale in any form whatsoever without prior permission from Stats SA.

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

Motor trade industry, 2018 / Statistics South Africa. Pretoria: Statistics South Africa, 2020

Report No. 63-01-02 (2018)

48 pages

ISBN: 978-0-621-48755-8

A complete set of Stats SA publications is available at Stats SA Library and the following libraries:

National Library of South Africa, Pretoria Division
National Library of South Africa, Cape Town Division
Library of Parliament, Cape Town
Bloemfontein Public Library
Natal Society Library, Pietermaritzburg
Johannesburg Public Library
Eastern Cape Library Services, King William's Town
Central Regional Library, Polokwane
Central Reference Library, Mbombela
Central Reference Collection, Kimberley
Central Reference Library, Mmabatho

This report is available on the Stats SA website: www.statssa.gov.za

For technical enquiries, please contact: Siyabonga Ngcobo / Tshepo Pekane

Tel.: 012 337 6322 / 012 310 8191

Email: siyabongan@statssa.gov.za / tshepop@statssa.gov.za

Table of Contents

1.	Introduction	1
1.1	Aim and collection unit	1
1.2	Scope and coverage	1
1.3	Data items	1
1.4	Reference period	1
1.5	Current prices	1
1.6	Reliability of data	2
1.7	Confidentiality	2
2	Summary of findings for the year 2018	3
2.1.	Income	3
	Table A – Income in the motor trade industry, 2009–2018	3
	Table B – Concentration ratio for total income in the motor trade industry, 2009–2018	4
	Table C – Profit margin in the motor trade industry, 2009–2018	5
2.2.	Employment	6
	Table D – Employment in the motor trade industry for the last pay period ended on or before 30 June, 2009–2018	6
	Figure 1 – Income and employment by type of service (% contribution) in the motor trade industry, 2018	7
	Figure 2 – Income and employment by enterprise size (% contribution) in the motor trade industry, 2018	8
	Table E – Average salaries and wages in the motor trade industry, 2009–2018	9
2.3.	Trade industry value added	10
	Figure 3 – Trade industry value added, annual percentage change (constant 2010 prices), 2011–2019	10
	Figure 4 – Percentage contribution of the trade industry to total value added (current prices), 2011–2019	10
2.4.	Capital expenditure on new assets	11
	Table F – Capital expenditure on new assets in the motor trade industry, 2009–2018	11
2.	Tables	12
	Table 1 – Principal statistics in the trade industry, 2015 and 2018	12
	Table 2 – Principal statistics in the motor trade industry, 2015 and 2018	12
	Table 3 – Principal statistics by type of motor trade in the motor trade industry, 2015 and 2018	13
	Table 4 – Profit margin in the motor trade industry, 2015 and 2018	15
	Table 5 – Income in the motor trade industry, 2015 and 2018	16
	Table 6 – Income in the motor trade industry, 2018	17
	Table 7 – Income by enterprise size in the motor trade industry, 2018	18
	Table 8 – Concentration ratios (relative contribution of large enterprises) in the motor trade industry, 2018	19
	Table 9 – Expenditure in the motor trade industry, 2015 and 2018	20
	Table 10 – Expenditure in the motor trade industry, 2018	21

Table 11 – Capital expenditure on new assets in the motor trade industry, 2015 and 2018	23
Table 12 – Capital expenditure on new assets in the motor trade industry, 2018	24
Table 13 – Employment in the motor trade industry for the last pay period ended on or before 30 June, 2015 and 2018	25
Table 14 – Details of employment in the motor trade industry for the last pay period ended on or before 30 June, 2018	26
Table 15 – Employment by enterprise size in the motor trade industry for the last pay period ended on or before 30 June, 2018	27
Table 16 – Details of income from sales of goods by commodity group in the motor trade industry, 2015 and 2018	28
Table 17 – Details of income from wholesale sales of motor vehicles by type of motor vehicle in the motor trade industry, 2015 and 2018	29
Table 18 – Details of income from retail sales of motor vehicles by type of motor vehicle in the motor trade industry, 2015 and 2018	30
Table 19 – Details of income from sales of goods by other commodity type in the motor trade industry, 2015 and 2018	31
Table 20 – Details of income from services in the motor trade industry, 2015 and 2018	32
Table 21 – Details of purchases by commodity group in the motor trade industry, 2015 and 2018	33
Table 22 – Details of purchases by commodity type in the motor trade industry, 2015 and 2018	34
Table 23 – Income from sales of goods and services by client base in the motor trade industry, 2015 and 2018	36
Table 24 – Income from sales of goods and services by client base in the motor trade industry, 2018	37
Table 25 – Information and communication technology (ICT) usage in the motor trade industry, 2018	38
Table 26 – Information and communication technology (ICT) usage by enterprise size in the motor trade industry, 2018	39
Explanatory notes	40
Table 27 – Size groups for the motor trade industry, 2018	40
Table 28 – Income in the motor trade industry within 95% confidence limits, 2018	42
Glossary	43

1. Introduction

1.1 Aim and collection unit

This publication presents estimates in respect of the motor trade industry, 2018. The survey aims to provide financial, production, employment and related information for the motor trade industry in South Africa.

The last survey was conducted in 2015 (Report No. 63-01-02 (2015)).

The statistical unit for the collection of information is an enterprise. An enterprise is a legal unit (or a combination of legal units) that includes and directly controls all functions necessary to carry out its activities. Each enterprise is classified to an industry that reflects its predominant activity.

1.2 Scope and coverage

The 2018 motor trade industry large sample survey covers enterprises registered for value added tax (VAT) 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).

1.3 Data items

The following categories of data items were collected: industrial classification, trading income, expenditure, profit or loss, inventories, capital expenditure on new assets, sales, services, purchases, client base, employment, salaries and wages, and information and communication technology usage.

N.B.: The 2015 figures are revised, while the 2018 figures are preliminary.

1.4 Reference period

The questionnaires were completed for the financial year ended on any date between 1 July 2017 and 30 June 2018, according to the usual reporting schedule of the enterprise, with the following exception:

- Employment as at 30 June 2018.

1.5 Current prices

The rand values are at current prices.

1.6 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 food and beverages 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.

1.7 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 2018

2.1. Income

Table A – Income in the motor trade industry, 2009–2018

Type of motor trade	2009		2012		2015		2018	
	R million	% contribution	R million	% contribution	R million	% contribution	R million	% contribution
Wholesale sales of motor vehicles	27 767	7,3	36 332	7,2	39 090	6,5	47 210	7,0
Retail sales of motor vehicles	192 722	51,1	236 978	46,9	289 480	48,4	344 208	50,7
Maintenance and repair of motor vehicles	19 696	5,2	24 944	4,9	27 060	4,5	30 150	4,4
Sales of new motor vehicle parts and accessories	35 190	9,3	51 503	10,2	60 091	10,0	63 354	9,3
Sales of used motor vehicle parts and accessories	2 017	0,5	2 156	0,4	2 368	0,4	3 461	0,5
Sales, maintenance and repair of motorcycles and related accessories	2 779	0,7	3 355	0,7	4 025	0,7	4 195	0,6
Retail sales of automotive fuel	98 095	25,9	150 312	29,7	176 944	29,5	186 510	27,5
Total	378 266	100,0	505 580	100,0	599 058	100,0	679 088	100,0

Source: Report No. 63-01-02

The total income for the motor trade industry in 2018 was R679,1 billion. The total income represents an increase of 4,3% per annum over the income reported in the corresponding survey of 2015 (R599,1 billion). Comparing 2015 and 2018, large increases were reported for 'retail sales of motor vehicles' (+R54,7 billion), 'retail sales of automotive fuel' (+R9,6 billion) and 'wholesale sales of motor vehicles' (+R8,1 billion).

Between 2009 and 2018, 'retail sales of automotive fuel' gained the biggest percentage share (+1,6 percentage points) in income from the motor trade industry (from a percentage contribution of 25,9% in 2009 to 27,5% in 2018). 'Maintenance and repair of motor vehicles' lost the biggest percentage share (-0,8 percentage points) over the same period (from 5,2% in 2009 to 4,4% in 2018).

Table B – Concentration ratio for total income in the motor trade industry, 2009–2018

Concentration ratio	2009	2012	2015	2018
	%			
CR5	18,9	17,6	15,9	14,0
CR10	26,4	22,5	21,0	18,9
CR20	31,3	27,2	26,6	25,6
CR50	37,9	33,5	33,8	33,3
CR100	42,9	38,7	39,5	39,3

Source: Report No. 63-01-02

In 2018, the top 100 enterprises in the motor trade industry contributed 39,3% to the total income. The highest concentration ratio of the top 100 enterprises (CR100) in the four periods was 42,9% in 2009. The concentration ratios of the top 5, 10, 20 and 50 enterprises were the lowest in 2018 at 14,0%, 18,9%, 25,6% and 33,3%, respectively. The lowest concentration ratio of the top 100 enterprises (CR100) in the four periods was 38,7% in 2012.

Table C – Profit margin in the motor trade industry, 2009–2018

Type of motor trade	Net profit/loss after tax				Turnover				Profit margin			
	2009	2012	2015	2018	2009	2012	2015	2018	2009	2012	2015	2018
	R million				R million				%			
Wholesale sales of motor vehicles	413	626	930	669	27 473	35 613	38 696	46 579	1,5	1,8	2,4	1,4
Retail sales of motor vehicles	6 160	4 973	6 053	6 580	188 052	232 445	284 941	336 394	3,3	2,1	2,1	2,0
Maintenance and repair of motor vehicles	519	625	819	801	19 182	24 492	26 759	29 706	2,7	2,6	3,1	2,7
Sales of new motor vehicle parts and accessories	752	1 709	1 952	2 101	34 368	50 562	59 070	62 523	2,2	3,4	3,3	3,4
Sales of used motor vehicle parts and accessories	98	104	117	115	1 982	2 121	2 346	3 384	4,9	4,9	5,0	3,4
Sales, maintenance and repair of motorcycles and related accessories	12	23	76	113	2 734	3 307	3 975	4 111	0,4	0,7	1,9	2,7
Retail sales of automotive fuel	264	1 916	1 834	2 607	97 832	149 749	176 309	185 732	0,3	1,3	1,0	1,4
Total	8 218	9 976	11 781	12 986	371 623	498 289	592 096	668 429	2,2	2,0	2,0	1,9

Source: Report No. 63-01-02

The profit margin for the motor trade industry in 2018 was 1,9%. 'Sales of used motor vehicle parts and accessories' and 'sales of new motor vehicle parts and accessories' had the highest profit margin at 3,4% each, followed by 'maintenance and repair of motor vehicles' and 'sales, maintenance and repair of motorcycles and related accessories' at 2,7% each. 'Wholesale sales of motor vehicles' and 'retail sales of automotive fuel' had the lowest profit margin of 1,4% each in 2018.

Between 2009 and 2018, the motor trade industry recorded a highest profit margin of 2,2% in 2009. The highest profit margin by type of motor trade was 'sales of used motor vehicle parts and accessories' at 5,0% in 2015. 'Retail sales of automotive fuel' is the only type of motor trade which had profit margins consistently lower than the overall profit margin in all the four years surveyed.

2.2. Employment

Table D – Employment in the motor trade industry for the last pay period ended on or before 30 June, 2009–2018

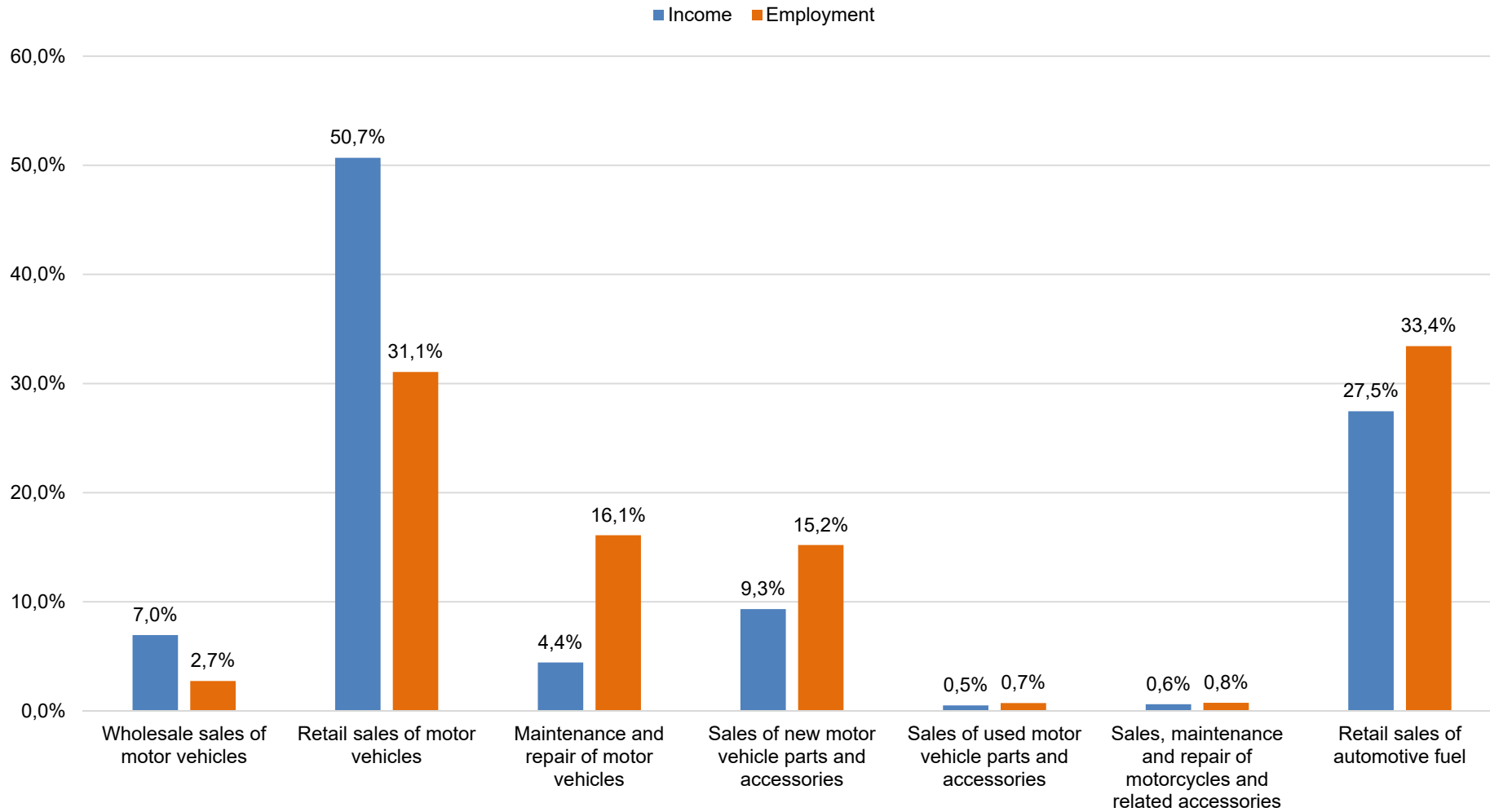
Type of motor trade	2009		2012		2015		2018	
	Number	% contribution	Number	% contribution	Number	% contribution	Number	% contribution
Wholesale sales of motor vehicles	9 279	3,6	8 951	3,2	6 177	2,3	7 332	2,7
Retail sales of motor vehicles	82 815	32,1	83 344	30,0	81 366	30,2	83 013	31,1
Maintenance and repair of motor vehicles	49 729	19,2	48 762	17,6	47 502	17,6	43 040	16,1
Sales of new motor vehicle parts and accessories	39 307	15,2	45 586	16,4	42 425	15,7	40 638	15,2
Sales of used motor vehicle parts and accessories	3 571	1,4	2 764	1,0	2 175	0,8	1 926	0,7
Sales, maintenance and repair of motorcycles and related accessories	1 857	0,7	2 561	0,9	2 030	0,8	2 005	0,8
Retail sales of automotive fuel	71 819	27,8	85 692	30,9	88 099	32,6	89 365	33,4
Total	258 377	100,0	277 660	100,0	269 774	100,0	267 319	100,0

Source: Report No. 63-01-02

The total number of persons employed in the motor trade industry as at the end of June 2018 was 267 319. This represents a decrease of 0,3% per annum over the employment recorded in 2015 (269 774 persons). 'Retail sales of automotive fuel' employed the largest number of persons (89 365 or 33,4%), followed by 'retail sales of motor vehicles' (83 013 or 31,1%) and 'maintenance and repair of motor vehicles' (43 040 or 16,1%).

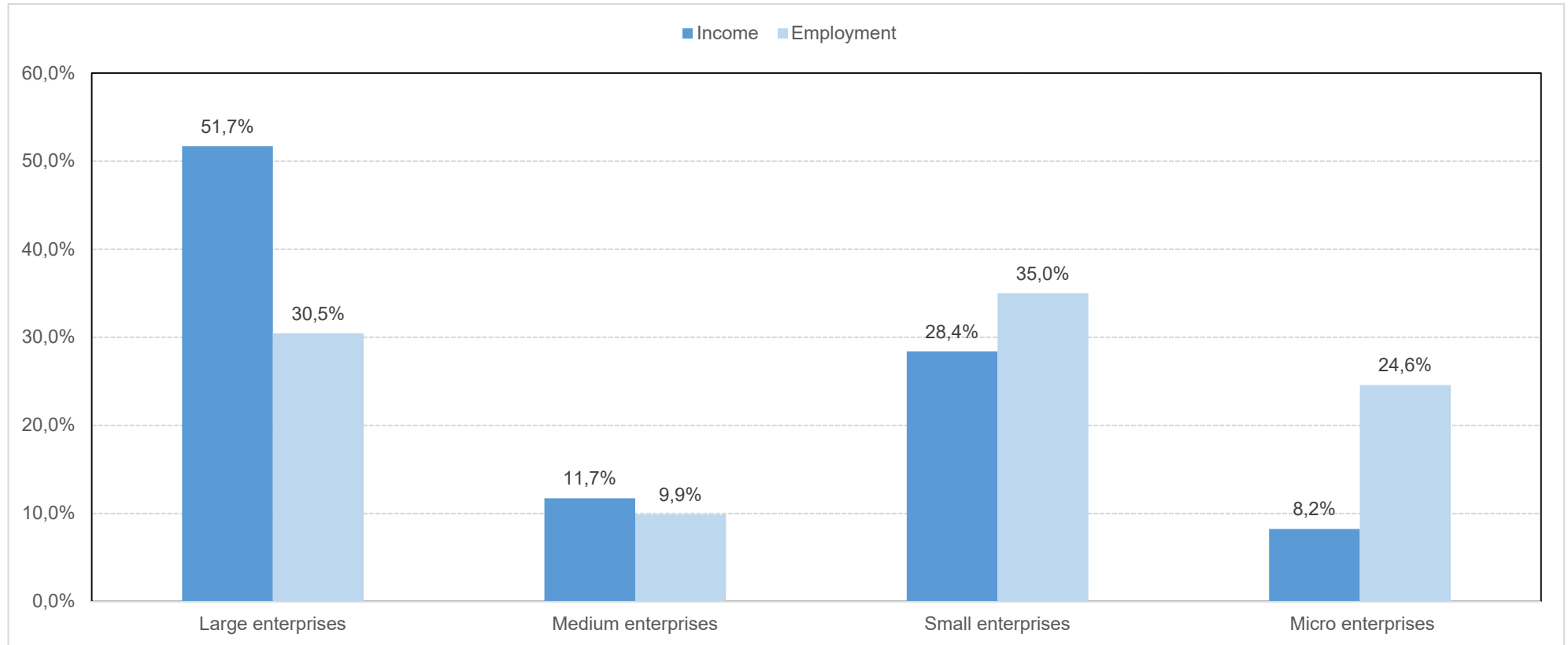
Formal employment increased from 258 377 in 2009 to 267 319 in 2018 (a gain of 8 942 jobs). The biggest gains in persons employed between 2009 and 2018 were in 'retail sales of automotive fuel' (+17 546) and 'sales of new motor vehicle parts and accessories' (+1 331). The biggest loss in persons employed was in 'maintenance and repair of motor vehicles' (-6 689 jobs).

Figure 1 – Income and employment by type of service (% contribution) in the motor trade industry, 2018



The type of motor trade with the highest proportion of employment compared with its proportion of income was 'maintenance and repair of motor vehicles' (contributing 16,1% of employment and 4,4% of income), followed by 'sales of new motor vehicle parts and accessories' (15,2% of employment and 9,3% of income). Although 'retail sales of motor vehicles' contributed 50,7% of the total income of the motor trade industry in 2018, its contribution to employment was only 31,1%.

Figure 2 – Income and employment by enterprise size (% contribution) in the motor trade industry, 2018



Large enterprises (those with annual turnover greater than R234 million) contributed 51,7% of the total income of the motor trade industry in 2018, but their contribution to employment was only 30,5%. Most (69,5%) of the employment in the industry was created by small, medium and micro enterprises (SMMEs), while their contribution to income was 48,3%.

Table E – Average salaries and wages in the motor trade industry, 2009–2018

Type of motor trade	2009			2012			2015			2018		
	Salaries and wages	Total employees	Average salaries and wages	Salaries and wages	Total employees	Average salaries and wages	Salaries and wages	Total employees	Average salaries and wages	Salaries and wages	Total employees	Average salaries and wages
	R million	Number	Rand	R million	Number	Rand	R million	Number	Rand	R million	Number	Rand
Wholesale sales of motor vehicles	1 055	9 279	113 698	1 425	8 951	159 200	1 650	6 177	267 120	2 088	7 332	284 779
Retail sales of motor vehicles	11 705	82 815	141 339	15 489	83 344	185 844	18 225	81 366	223 988	20 504	83 013	246 997
Maintenance and repair of motor vehicles	3 886	49 729	78 144	5 257	48 762	107 809	5 867	47 502	123 511	6 798	43 040	157 946
Sales of new motor vehicle parts and accessories	3 630	39 307	92 350	5 791	45 586	127 035	6 459	42 425	152 245	7 013	40 638	172 572
Sales of used motor vehicle parts and accessories	305	3 571	85 410	324	2 764	117 221	325	2 175	149 425	376	1 926	195 223
Sales, maintenance and repair of motorcycles and related accessories	233	1 857	125 471	346	2 561	135 103	350	2 030	172 414	392	2 005	195 511
Retail sales of automotive fuel	3 898	71 819	54 275	6 395	85 692	74 628	7 046	88 099	79 978	9 823	89 365	109 920
Total	24 712	258 377	95 643	35 027	277 660	126 151	39 922	269 774	147 983	46 994	267 319	175 797

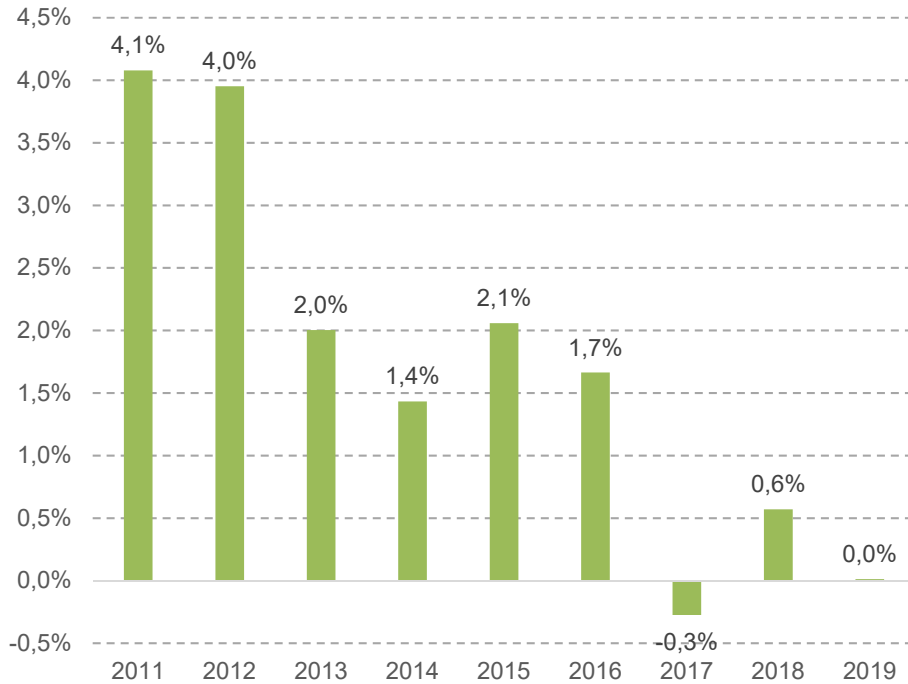
Sources: Report No. 63-01-02

The average for salaries and wages in the motor trade industry in 2018 was R175 797. The type of motor trade with the highest average salaries and wages in 2018 was 'wholesale sales of motor vehicles' (R284 779), followed by 'retail sales of motor vehicles' (R246 997) and 'sales, maintenance and repair of motorcycles and related accessories' (R195 511). The type of motor trade with the lowest average salaries and wages in 2018 was 'retail sales of automotive fuel' (R109 920).

Total average salaries and wages increased from R95 643 in 2009 to R175 797 in 2018, an annualised growth rate of 7,0%. The highest annualised growth rate between surveys in the motor trade was 9,7% between 2009 and 2012.

2.3. Trade industry value added ¹

Figure 3 – Trade industry value added, annual percentage change (constant 2010 prices), 2011–2019

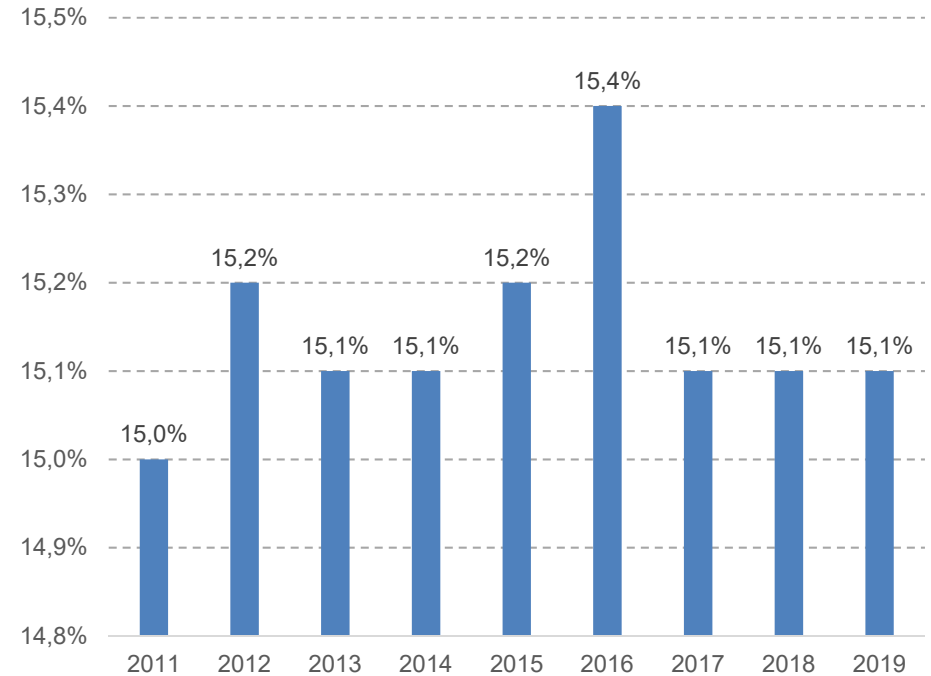


Source: P0441, GDP annual and regional tables, 2020

Trade industry value added at constant 2010 prices increased from R385,7 billion in 2011 to R431,7 billion in 2019. The annual growth rate fell from 4,0% in 2012 to 2,0% in 2013, and in 2017 there was a contraction of 0,3%. The average annual growth rate during 2011–2019 was 1,7% (P0441, GDP annual and regional tables, 2020).

¹ Wholesale, retail, motor, tourist accommodation, and food and beverages.

Figure 4 – Percentage contribution of the trade industry to total value added (current prices), 2011–2019



Source: P0441, GDP annual and regional tables, 2020

Between 2015 and 2018, the contribution of the trade industry to total value added declined slightly from 15,2% to 15,1%. For the period 2011 to 2019, the highest contribution of the trade industry to total value added was 15,4% in 2016.

2.4. Capital expenditure on new assets

Table F – Capital expenditure on new assets in the motor trade industry, 2009–2018

Type of motor trade	2009		2012		2015		2018	
	R million	% contribution	R million	% contribution	R million	% contribution	R million	% contribution
Wholesale sales of motor vehicles	86	1,6	132	2,2	341	4,7	273	4,1
Retail sales of motor vehicles	4 312	78,3	4 066	69,0	4 951	67,8	4 385	65,1
Maintenance and repair of motor vehicles	470	8,5	592	10,1	762	10,4	739	11,0
Sales of new motor vehicle parts and accessories	337	6,1	481	8,2	569	7,8	451	6,7
Sales of used motor vehicle parts and accessories	23	0,4	37	0,6	56	0,8	38	0,6
Sales, maintenance and repair of motorcycles and related accessories	7	0,1	33	0,6	54	0,7	58	0,9
Retail sales of automotive fuel	276	5,0	549	9,3	570	7,8	780	11,6
Total	5 511	100,0	5 890	100,0	7 303	100,0	6 724	100,0

Source: Report No. 63-01-02

The capital expenditure on new assets in 2018 (R6,7 billion) represents a decrease of 2,7% per annum over the expenditure reported in the corresponding survey of 2015 (R7,3 billion). The biggest decrease was reported in 'retail sales of motor vehicles' (-R566 million). The largest contributor to capital expenditure on new assets in 2018 was 'retail sales of motor vehicles' (R4,4 billion or 65,1%), followed by 'retail sales of automotive fuel' (R780 million or 11,6%) and 'maintenance and repair of motor vehicles' (R739 million or 11,0%).

Between 2009 and 2018, 'retail sales of automotive fuel' gained the biggest percentage share (+6,6 percentage points) in capital expenditure on new assets (from a percentage contribution of 5,0% in 2009 to 11,6% in 2018). 'Retail sales of motor vehicles' lost the biggest percentage share (-13,2 percentage points) over the same period (from 78,3% in 2009 to 65,1% in 2018).



Risenga Maluleke
Statistician-General

2. Tables

Table 1 – Principal statistics in the trade industry¹, 2015 and 2018

	Turnover	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	Number of employees
	R million							Number
2015	3 049 350	3 109 038	3 015 407	294 042	315 865	115 454	54 548	1 821 779
2018	3 628 691	3 710 988	3 604 059	395 054	418 625	130 500	60 106	1 856 290
Annualised % change	6,0	6,1	6,1	10,3	9,8	4,2	3,3	0,6

¹ The trade industry comprises wholesale trade, retail trade, motor trade, tourist accommodation, and food and beverages.

Table 2 – Principal statistics in the motor trade industry, 2015 and 2018

	Turnover	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	Number of employees
	R million							Number
2015	592 096	599 058	586 823	54 820	58 320	15 735	7 303	269 774
2018	668 429	679 088	666 638	70 599	75 388	17 239	6 724	267 319
Annualised % change	4,1	4,3	4,3	8,8	8,9	3,1	-2,7	-0,3

Table 3 – Principal statistics by type of motor trade in the motor trade industry, 2015 and 2018

Type of motor trade	Total income			Total expenditure			Total opening inventory		
	2015	2018	Annualised % change	2015	2018	Annualised % change	2015	2018	Annualised % change
	R million			R million			R million		
Wholesale sales of motor vehicles	39 090	47 210	6,5	37 217	47 546	8,5	6 887	8 130	5,7
Retail sales of motor vehicles	289 480	344 208	5,9	284 341	337 937	5,9	33 620	46 889	11,7
Maintenance and repair of motor vehicles	27 060	30 150	3,7	26 246	29 236	3,7	1 508	1 792	5,9
Sales of new motor vehicle parts and accessories	60 091	63 354	1,8	58 187	61 532	1,9	8 919	9 529	2,2
Sales of used motor vehicle parts and accessories	2 368	3 461	13,5	2 253	3 376	14,4	301	408	10,7
Sales, maintenance and repair of motorcycles and related accessories	4 025	4 195	1,4	3 982	4 081	0,8	672	839	7,7
Retail sales of automotive fuel	176 944	186 510	1,8	174 597	182 930	1,6	2 913	3 012	1,1
Total	599 058	679 088	4,3	586 823	666 638	4,3	54 820	70 599	8,8

Table 3 – Principal statistics by type of motor trade in the motor trade industry, 2015 and 2018 (concluded)

Type of motor trade	Total closing inventory			Net profit or loss before tax			Capital expenditure on new assets		
	2015	2018	Annualised % change	2015	2018	Annualised % change	2015	2018	Annualised % change
	R million			R million			R million		
Wholesale sales of motor vehicles	6 314	9 378	14,1	1 300	912	-11,1	341	273	-7,1
Retail sales of motor vehicles	36 535	49 051	10,3	8 054	8 433	1,5	4 951	4 385	-4,0
Maintenance and repair of motor vehicles	1 741	1 932	3,5	1 047	1 054	0,2	762	739	-1,0
Sales of new motor vehicle parts and accessories	9 653	10 481	2,8	2 638	2 774	1,7	569	451	-7,5
Sales of used motor vehicle parts and accessories	334	472	12,2	148	149	0,2	56	38	-12,1
Sales, maintenance and repair of motorcycles and related accessories	734	839	4,6	105	114	2,8	54	58	2,4
Retail sales of automotive fuel	3 009	3 235	2,4	2 443	3 803	15,9	570	780	11,0
Total	58 320	75 388	8,9	15 735	17 239	3,1	7 303	6 724	-2,7

Table 4 – Profit margin in the motor trade industry, 2015 and 2018

Type of motor trade	Net profit/loss after tax		Turnover		Profit margin ²	
	2015	2018	2015	2018	2015	2018
	R million		R million		%	
Wholesale sales of motor vehicles	930	669	38 696	46 579	2,4	1,4
Retail sales of motor vehicles	6 053	6 580	284 941	336 394	2,1	2,0
Maintenance and repair of motor vehicles	819	801	26 759	29 706	3,1	2,7
Sales of new motor vehicle parts and accessories	1 952	2 101	59 070	62 523	3,3	3,4
Sales of used motor vehicle parts and accessories	117	115	2 346	3 384	5,0	3,4
Sales, maintenance and repair of motorcycles and related accessories	76	113	3 975	4 111	1,9	2,7
Retail sales of automotive fuel	1 834	2 607	176 309	185 732	1,0	1,4
Total	11 781	12 986	592 096	668 429	2,0	1,9

² Profit margin = net profit after tax divided by turnover multiplied by 100

Table 5 – Income in the motor trade industry, 2015 and 2018

Type of income	2015	2018	2015	2018	Annualised % change
	R million		% contribution		
Sales of goods	541 557	618 963	90,5	91,1	4,6
Services	47 501	47 571	7,9	7,0	0,0
Interest received	2 014	2 755	0,3	0,4	11,0
Other income	7 986	9 799	1,3	1,5	7,1
Total	599 058	679 088	100,0	100,0	4,3

Table 6 – Income in the motor trade industry, 2018

Type of motor trade	Sales of goods	Services	Interest received	Other income	Total
	R million				
Wholesale sales of motor vehicles	44 815	1 608	262	525	47 210
Retail sales of motor vehicles	316 065	18 986	1 787	7 370	344 208
Maintenance and repair of motor vehicles	6 667	23 023	108	352	30 150
Sales of new motor vehicle parts and accessories	59 945	2 492	266	651	63 354
Sales of used motor vehicle parts and accessories	3 360	21	15	65	3 461
Sales, maintenance and repair of motorcycles and related accessories	3 910	194	18	73	4 195
Retail sales of automotive fuel	184 201	1 247	299	763	186 510
Total	618 963	47 571	2 755	9 799	679 088

Table 7 – Income by enterprise size in the motor trade industry, 2018

Type of motor trade	Large enterprises	Medium enterprises	Small enterprises	Micro enterprises	Total
	R million				
Wholesale sales of motor vehicles	37 262	2 839	4 587	2 522	47 210
Retail sales of motor vehicles	262 829	30 533	39 942	10 904	344 208
Maintenance and repair of motor vehicles	1 499	1 538	9 883	17 230	30 150
Sales of new motor vehicle parts and accessories	26 542	7 466	18 261	11 085	63 354
Sales of used motor vehicle parts and accessories	982	527	1 328	624	3 461
Sales, maintenance and repair of motorcycles and related accessories	505	351	2 071	1 268	4 195
Retail sales of automotive fuel	21 439	36 395	116 365	12 311	186 510
Total	351 058	79 649	192 437	55 944	679 088

Table 8 – Concentration ratios (relative contribution of large enterprises) in the motor trade industry, 2018

Type of motor trade	Total Income	Income of the 5 largest enterprises	Relative contribution of the 5 largest enterprises ⁴	Income of the 10 largest enterprises	Relative contribution of the 10 largest enterprises ⁴	Income of the 20 largest enterprises	Relative contribution of the 20 largest enterprises ⁴
	R million		%	R million		%	R million
Wholesale sales of motor vehicles	47 210	22 073	46,8	29 392	62,3	35 918	76,1
Retail sales of motor vehicles	344 208	94 823	27,5	126 494	36,7	163 788	47,6
Maintenance and repair of motor vehicles	30 150	1 802	6,0	2 443	8,1	3 433	11,4
Sales of new motor vehicle parts and accessories	63 354	11 041	17,4	14 966	23,6	19 636	31,0
Sales of used motor vehicle parts and accessories	3 461	1 510	43,6	1 886	54,5	2 270	65,6
Sales, maintenance and repair of motorcycles and related accessories	4 195	863	20,6	1 320	31,5	1 825	43,5
Retail sales of automotive fuel	186 510	5 943	3,2	8 819	4,7	12 821	6,9
Total	679 088	94 823 ³	14,0	128 367 ³	18,9	173 954 ³	25,6

³ These figures reflect the income of the 5, 10 and 20 largest enterprises respectively, and not the column totals.

⁴ Relative contribution = income of the largest enterprises divided by total income multiplied by 100.

Table 9 – Expenditure in the motor trade industry, 2015 and 2018

Type of expenditure	2015	2018	2015	2018	Annualised % change
	R million		% contribution		
Purchases	496 902	554 590	84,7	83,3	3,7
Employment costs	39 922	46 994	6,8	7,0	5,6
Rental and leasing of land, buildings and other structures under operating leases	7 231	9 580	1,2	1,4	9,8
Interest paid	4 053	5 265	0,7	0,8	9,1
Advertising	2 041	2 275	0,3	0,3	3,7
Utilities (water and electricity)	1 739	2 006	0,3	0,3	4,9
Leasing and hiring of plant, machinery, equipment and vehicles under operating leases	1 147	1 280	0,2	0,2	3,7
Railage and transport-out	1 142	1 304	0,2	0,2	4,5
Subcontractors	1 663	286	0,3	0,0	-44,4
Labour/employment brokers	107	49	0,0	0,0	-22,9
Other expenditure	30 876	43 009	5,3	6,5	11,7
Total	586 823	666 638	100,0	100,0	4,3

Table 10 – Expenditure in the motor trade industry, 2018

Type of motor trade	Purchases	Employment costs	Rental and leasing of land, buildings and other structures under operating leases	Interest paid	Advertising	Utilities (water and electricity)	Leasing and hiring of plant, machinery, equipment and vehicles under operating leases
	R million						
Wholesale sales of motor vehicles	39 426	2 088	338	486	427	51	165
Retail sales of motor vehicles	286 397	20 504	4 280	3 518	1 334	433	293
Maintenance and repair of motor vehicles	16 939	6 798	808	174	88	287	380
Sales of new motor vehicle parts and accessories	47 143	7 013	1 108	583	190	240	178
Sales of used motor vehicle parts and accessories	2 628	376	74	18	15	15	22
Sales, maintenance and repair of motorcycles and related accessories	3 183	392	67	18	32	17	12
Retail sales of automotive fuel	158 874	9 823	2 905	468	189	963	230
Total	554 590	46 994	9 580	5 265	2 275	2 006	1 280

Table 10 – Expenditure in the motor trade industry, 2018 (concluded)

Type of motor trade	Railage and transport-out	Subcontractors	Other expenditure	Total
	R million			
Wholesale sales of motor vehicles	208	3	4 354	47 546
Retail sales of motor vehicles	331	59	20 788	337 937
Maintenance and repair of motor vehicles	79	142	3 541	29 236
Sales of new motor vehicle parts and accessories	517	11	4 549	61 532
Sales of used motor vehicle parts and accessories	13	10	205	3 376
Sales, maintenance and repair of motorcycles and related accessories	36	23	301	4 081
Retail sales of automotive fuel	120	38	9 320	182 930
Total	1 304	286	43 058	666 638

Table 11 – Capital expenditure on new assets in the motor trade industry, 2015 and 2018

Type of asset	2015	2018	2015	2018	Annualised % change
	R million		% contribution		
Land, buildings and construction	1 054	1 218	14,4	18,1	4,9
Plant, machinery and equipment	1 116	1 426	15,3	21,2	8,5
Computers	287	244	3,9	3,6	-5,3
Motor vehicles	4 491	3 434	61,5	51,1	-8,6
Other	355	402	4,9	6,0	4,2
Total	7 303	6 724	100,0	100,0	-2,7

Table 12 – Capital expenditure on new assets in the motor trade industry, 2018

Type of motor trade	Land, buildings and construction	Plant, machinery and equipment	Computers	Motor vehicles	Other	Total
	R million					
Wholesale sales of motor vehicles	9	18	16	174	56	273
Retail sales of motor vehicles	774	914	135	2 349	213	4 385
Maintenance and repair of motor vehicles	88	137	17	494	3	739
Sales of new motor vehicle parts and accessories	73	113	40	152	73	451
Sales of used motor vehicle parts and accessories	5	9	4	20	0	38
Sales, maintenance and repair of motorcycles and related accessories	14	15	1	28	0	58
Retail sales of automotive fuel	255	220	31	217	57	780
Total	1 218	1 426	244	3 434	402	6 724

Table 13 – Employment in the motor trade industry for the last pay period ended on or before 30 June, 2015 and 2018

Type of motor trade	Female employees			Male employees			Total employees		
	2015	2018	Annualised % change	2015	2018	Annualised % change	2015	2018	Annualised % change
	Number			Number			Number		
Wholesale sales of motor vehicles	1 371	2 145	16,1	4 806	5 187	2,6	6 177	7 332	5,9
Retail sales of motor vehicles	23 653	25 534	2,6	57 713	57 479	-0,1	81 366	83 013	0,7
Maintenance and repair of motor vehicles	10 723	9 795	-3,0	36 779	33 245	-3,3	47 502	43 040	-3,2
Sales of new motor vehicle parts and accessories	9 445	8 334	-4,1	32 980	32 304	-0,7	42 425	40 638	-1,4
Sales of used motor vehicle parts and accessories	441	308	-11,3	1 734	1 618	-2,3	2 175	1 926	-4,0
Sales, maintenance and repair of motorcycles and related accessories	480	609	8,3	1 550	1 396	-3,4	2 030	2 005	-0,4
Retail sales of automotive fuel	29 351	31 146	2,0	58 748	58 219	-0,3	88 099	89 365	0,5
Total	75 464	77 871	1,1	194 310	189 448	-0,8	269 774	267 319	-0,3

Table 14 – Details of employment in the motor trade industry for the last pay period ended on or before 30 June, 2018

Type of motor trade	Full-time			Part-time			Total
	Female	Male	Total	Female	Male	Total	
	Number of employees						
Wholesale sale of motor vehicles	2 125	5 095	7 220	20	92	112	7 332
Retail sale of motor vehicles	25 242	56 994	82 236	292	485	777	83 013
Maintenance and repair of motor vehicles	8 952	32 290	41 242	843	955	1 798	43 040
Sales of new parts and accessories	8 124	31 344	39 468	210	960	1 170	40 638
Sales of used parts and accessories	293	1 579	1 872	15	39	54	1 926
Sale, maintenance and repair of motor cycles and related parts and accessories	504	1 391	1 895	105	5	110	2 005
Retail sale of automotive fuel	30 472	56 865	87 337	674	1 354	2 028	89 365
Total	75 712	185 558	261 270	2 159	3 890	6 049	267 319

Table 15 – Employment by enterprise size in the motor trade industry for the last pay period ended on or before 30 June, 2018

Type of motor trade	Large enterprises	Medium enterprises	Small enterprises	Micro enterprises	Total
	Number of employees				
Wholesale sales of motor vehicles	2 384	748	996	3 204	7 332
Retail sales of motor vehicles	55 557	7 218	13 077	7 161	83 013
Maintenance and repair of motor vehicles	602	892	11 412	30 134	43 040
Sales of new motor vehicle parts and accessories	14 131	2 904	11 556	12 047	40 638
Sales of used motor vehicle parts and accessories	103	143	905	775	1 926
Sales, maintenance and repair of motorcycles and related accessories	42	102	756	1 105	2 005
Retail sales of automotive fuel	8 618	14 394	55 043	11 310	89 365
Total	81 437	26 401	93 745	65 736	267 319

Table 16 – Details of income from sales of goods by commodity group in the motor trade industry, 2015 and 2018

Commodity group	2015	2018	2015	2018	Annualised % change
	R million		% contribution		
Wholesale sales of new vehicles	43 892	53 728	8,1	8,7	7,0
Wholesale sales of used vehicles	10 158	13 248	1,9	2,1	9,3
Retail sales of new vehicles	132 598	154 302	24,5	24,9	5,2
Retail sales of used vehicles	81 881	105 560	15,1	17,1	8,8
Tyres, parts and accessories	96 671	104 461	17,9	16,9	2,6
Fuel	153 144	166 390	28,2	26,9	2,8
Other sales	23 213	21 274	4,3	3,4	-2,9
Total sales of goods	541 557	618 963	100,0	100,0	4,6

Table 17 – Details of income from wholesale sales of motor vehicles by type of motor vehicle in the motor trade industry, 2015 and 2018 ⁵

Type of vehicle sold	2015		2018	
	Number	R million	Number	R million
New vehicles				
Sedans	42 168	7 399	33 336	6 712
Hatchbacks	44 850	6 408	65 740	10 981
Minibuses	4 221	2 406	4 354	2 978
Vans	22 750	5 157	13 643	3 377
Trucks	5 943	6 861	9 491	10 731
Motorcycles	10 258	825	8 510	732
Other new vehicles	***	14 836	***	18 217
Total		43 892		53 728
Used vehicles				
Sedans	30 430	3 823	28 072	4 076
Hatchbacks	16 208	1 824	21 416	3 034
Minibuses	498	79	663	102
Vans	6 210	916	7 351	1 295
Trucks	750	390	1 094	609
Motorcycles	541	38	1 257	143
Other used vehicles	***	3 088	***	3 989
Total		10 158		13 248
Total wholesale sales of vehicles		54 050		66 976

⁵ Excluding direct purchases from local manufacturers

Table 18 – Details of income from retail sales of motor vehicles by type of motor vehicle in the motor trade industry, 2015 and 2018

Type of vehicle sold	2015		2018	
	Number	R million	Number	R million
New vehicles				
Sedans	142 616	38 586	106 604	33 522
Hatchbacks	83 773	21 312	84 201	22 234
Minibuses	18 672	8 152	19 306	7 935
Vans	79 069	23 795	82 020	28 127
Trucks	13 506	13 944	16 139	13 962
Motorcycles	26 597	2 453	17 191	2 022
Other new vehicles	***	24 356	***	46 500
Total		132 598		154 302
Used vehicles				
Sedans	177 346	33 503	164 639	33 341
Hatchbacks	94 671	15 214	87 534	15 726
Minibuses	5 434	1 868	9 955	3 230
Vans	41 852	7 532	43 361	9 438
Trucks	5 734	3 006	9 211	4 324
Motorcycles	7 882	732	7 648	1 033
Other used vehicles	***	20 026	***	38 468
Total		81 881		105 560
Total retail sales of vehicles		214 479		259 862

Table 19 – Details of income from sales of goods by other commodity type in the motor trade industry, 2015 and 2018

Commodity type	2015	2018	2015	2018	Annualised % change
	R million		% contribution		
Tyres, parts and accessories					
New tyres	25 443	31 875	4,7	5,1	7,8
New other vehicle parts and accessories	65 088	66 695	12,1	10,8	0,8
Used tyres	1 545	1 600	0,3	0,3	1,2
Used other vehicle parts and accessories	4 595	4 291	0,8	0,7	-2,3
Total	96 671	104 461	17,9	16,9	2,6
Fuel and other automotive products					
Petrol	95 769	108 983	17,6	17,6	4,4
Diesel	52 200	51 225	9,6	8,3	-0,6
Gas	848	966	0,2	0,2	4,4
Oil	4 327	5 216	0,8	0,8	6,4
Total	153 144	166 390	28,2	26,9	2,8
Other sales					
Food	9 040	7 444	1,7	1,2	-6,3
Beverages	3 439	2 380	0,6	0,4	-11,5
Tobacco	2 733	1 824	0,5	0,3	-12,6
Other sales of goods	8 001	9 626	1,5	1,5	6,4
Total	23 213	21 274	4,3	3,4	-2,9
Total sales of goods	541 557	618 963	100,0	100,0	4,6

Table 20 – Details of income from services in the motor trade industry, 2015 and 2018

Type of service	2015	2018	2015	2018	Annualised % change
	R million		% contribution		
Ordinary interval servicing	7 982	11 618	16,8	24,4	13,3
Mechanical repair and maintenance services	8 069	8 791	17,0	18,5	2,9
Electrical system repair	970	946	2,0	2,0	-0,8
Panel-beating and spray-painting	12 366	13 296	26,0	27,8	2,4
Tyre and tube puncture repair and fitment services	1 733	1 786	3,6	3,8	1,0
Wheel balancing and alignment services	741	884	1,6	1,9	6,1
Emergency towing and roadside assistance as part of after-sale services	905	505	1,9	1,1	-17,7
Installation of body parts, windscreen and accessories	981	1 520	2,1	3,2	15,7
Other services	13 754	8 225	29,0	17,3	-15,8
Total	47 501	47 571	100,0	100,0	0,0

Table 21 – Details of purchases by commodity group in the motor trade industry, 2015 and 2018

Commodity group	2015	2018	2015	2018	Annualised % change
	R million		% contribution		
Total new vehicles	158 766	176 059	32,0	31,7	3,5
Total used vehicles	84 217	116 765	16,9	21,1	11,5
Total tyres, parts and accessories	92 029	95 862	18,5	17,3	1,4
Total fuel	134 353	140 748	27,1	25,4	1,6
Total other purchases	27 537	25 156	5,5	4,5	-3,0
Total purchases	496 902	554 590	100,0	100,0	3,7

Table 22 – Details of purchases by commodity type in the motor trade industry, 2015 and 2018

Commodity type	2015	2018	2015	2018	Annualised % change
	R million		% contribution		
New vehicles					
Cars	102 582	107 250	20,7	19,3	1,5
Minibuses	9 680	9 814	1,9	1,8	0,5
Vans	24 010	26 057	4,8	4,7	2,8
Trucks and lorries	18 246	21 230	3,7	3,8	5,2
Other new vehicles	4 248	11 708	0,9	2,1	40,2
Total	158 766	176 059	32,0	31,7	3,5
Used vehicles					
Cars	69 922	92 886	14,1	16,8	9,9
Minibuses	1 507	2 381	0,3	0,4	16,5
Vans	8 093	10 446	1,6	1,9	8,9
Trucks and lorries	2 958	3 827	0,6	0,7	9,0
Other used vehicles	1 737	7 225	0,3	1,3	60,8
Total	84 217	116 765	16,9	21,1	11,5
Tyres, parts and accessories					
New tyres	20 761	23 994	4,2	4,3	4,9
New parts and accessories	64 360	64 703	12,9	11,7	0,2
Used tyres	1 186	1 967	0,2	0,4	18,4
Used parts and accessories	5 722	5 198	1,2	0,9	-3,2
Total	92 029	95 862	18,5	17,3	1,4

Table 22 – Details of purchases by commodity type in the motor trade industry, 2015 and 2018 (concluded)

Commodity type	2015	2018	2015	2018	Annualised % change
	R million		% contribution		
Fuel					
Petrol	85 988	96 881	17,3	17,5	4,1
Diesel	48 365	43 867	9,7	7,9	-3,2
Total	134 353	140 748	27,0	25,4	1,6
Other purchases					
Food	7 952	5 913	1,6	1,1	-9,4
Beverages	2 756	1 757	0,6	0,3	-13,9
Tobacco	2 310	1 662	0,5	0,3	-10,4
Other purchases	14 519	15 824	2,9	2,8	2,9
Total	27 537	25 156	5,6	4,5	-3,0
Total purchases	496 902	554 590	100,0	100,0	3,7

Table 23 – Income from sales of goods and services by client base in the motor trade industry, 2015 and 2018

Client base	2015	2018	2015	2018	Annualised % change
	R million		% contribution		
Individuals and households	390 618	449 089	66,3	67,4	4,8
Businesses	182 522	199 499	31,0	29,9	3,0
Government	15 918	17 946	2,7	2,7	4,1
Total	589 058	666 534	100,0	100,0	4,2

Table 24 – Income from sales of goods and services by client base in the motor trade industry, 2018

Type of motor trade	Individuals and households	Businesses (including parastatals)	Government	Total
	R million			
Wholesale sales of motor vehicles	11 705	34 356	362	46 423
Retail sales of motor vehicles	233 395	95 153	6 503	335 051
Maintenance and repair of motor vehicles	18 537	10 589	564	29 690
Sales of new motor vehicle parts and accessories	27 868	34 124	445	62 437
Sales of used motor vehicle parts and accessories	2 684	674	23	3 381
Sales, maintenance and repair of motorcycles and related accessories	3 611	452	41	4 104
Retail sales of automotive fuel	151 289	24 151	10 008	185 448
Total	449 089	199 499	17 946	666 534

Table 25 – Information and communication technology (ICT) usage in the motor trade industry, 2018

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	100,0	100,0	82,5	73,7	21,1	21,1	49,1
Retail sales of motor vehicles	100,0	100,0	88,1	87,5	30,4	32,5	44,7
Maintenance and repair of motor vehicles	100,0	99,0	77,2	52,0	23,8	19,5	46,3
Sales of new motor vehicle parts and accessories	99,4	100,0	82,5	67,5	31,3	34,3	43,4
Sales of used motor vehicle parts and accessories	100,0	100,0	74,4	71,8	17,9	20,5	51,3
Sales, maintenance and repair of motorcycles and related accessories	100,0	100,0	76,9	84,6	25,6	30,8	41,0
Retail sales of automotive fuel	100,0	100,0	81,2	23,2	18,8	28,1	42,0
Total	100,0	99,8	81,9	57,4	24,8	27,6	44,4

Table 26 – Information and communication technology (ICT) usage by enterprise size in the motor trade industry, 2018

Enterprise size	Use computer	Use internet	Use internet banking	Have website	Receive orders through the internet	Place orders through the internet	IT outsourced
	%						
Large enterprises	100,0	100,0	87,1	78,9	24,8	27,9	39,1
Medium enterprises	100,0	100,0	84,8	58,5	29,4	34,4	48,0
Small enterprises	100,0	100,0	81,7	51,1	21,9	26,6	48,5
Micro enterprises	99,6	98,8	72,8	41,6	23,7	20,2	39,3
Total	100,0	99,8	81,9	57,4	24,8	27,6	44,4

Explanatory notes

Background

The results presented in this publication have been derived from the 2018 motor trade industry large sample survey. This is a periodic survey which measures economic activity in the motor trade industry of the South African economy. The survey is based on a sample of private and public enterprises operating in motor trade industry.

The sample was drawn from Stats SA's business register. The business register is based mainly on the value-added tax (VAT) database of the South African Revenue Service (SARS). Enterprises are legally bound to register for VAT. Enterprises registered in the taxation system are included on the business register, and hence were given a chance of selection in the sample for the survey.

Value added tax (VAT)

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 01 July 2017 and 30 June 2018.

Purpose of the survey

Results of the survey are used within Stats SA for benchmarking the gross domestic product (GDP) and its components. These statistics are also used by government policy advisors in monitoring the performance and contribution of individual industries to the South African economy and the effectiveness of industry policies. The private sector uses the data to analyse comparative business and industry performance.

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 SIC group (five-digit) level. 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 turnover on Stats SA's business register. Large enterprises are those with an annual recorded turnover above R234 million. Table 27 presents Department of Trade, Industry and Competition (DTIC) cut-off points adjusted by a factor of 6,0.

Table 27 – Size groups for the motor trade industry, 2018

Size group	Turnover
Large enterprises	Turnover > R234 000 000
Medium enterprises	R114 000 000 < turnover ≤ R234 000 000
Small enterprises	R24 000 000 < turnover ≤ R114 000 000
Micro enterprises	Turnover ≤ R24 000 000

Survey methodology and design

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

A sample of approximately 2 644 enterprises was drawn using stratified simple random sampling. The enterprises were first stratified at the four-digit level according to the SIC and then by size of enterprise. All large and medium enterprises were completely enumerated. Turnover as recorded on the business register was used as the measure of size for stratification. The collection rate was 79,3%.

Collection rate	Collection rate = $((\text{collected} + \text{finalised investigations}) / \text{sample size}) \times 100$																								
Turnover collection rate	Turnover collection rate = $((\text{weighted collected enterprises BR turnover} + \text{weighted finalised investigations BR turnover}) / \text{population turnover}) \times 100$. The turnover collection rate was 88,9%.																								
Weighting methodology	For those strata not completely enumerated, the weights to produce estimates are the inverse ratio of the sampling fraction, modified to take account of non-response in the survey. Stratum estimates were calculated and then aggregated with the completely enumerated stratum to form division estimates.																								
Revisions to previous results	Revisions were made to previous results due to new information obtained after publication.																								
Abbreviations	<table> <tr> <td>BR</td> <td>Business Register</td> </tr> <tr> <td>DTIC</td> <td>Department of Trade, Industry and Competition</td> </tr> <tr> <td>GDP</td> <td>Gross domestic product</td> </tr> <tr> <td>ISIC</td> <td>International Standard Industrial Classification of All Economic Activities</td> </tr> <tr> <td>IT</td> <td>Income tax</td> </tr> <tr> <td>RSE</td> <td>Relative standard error</td> </tr> <tr> <td>SARS</td> <td>South African Revenue Service</td> </tr> <tr> <td>SE</td> <td>Standard error</td> </tr> <tr> <td>SIC</td> <td>Standard Industrial Classification of all Economic Activities</td> </tr> <tr> <td>SNA</td> <td>System of National Accounts</td> </tr> <tr> <td>Stats SA</td> <td>Statistics South Africa</td> </tr> <tr> <td>VAT</td> <td>Value added tax</td> </tr> </table>	BR	Business Register	DTIC	Department of Trade, Industry and Competition	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
BR	Business Register																								
DTIC	Department of Trade, Industry and Competition																								
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																								

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

Table 28 – Income in the motor trade industry within 95% confidence limits, 2018

Type of motor trade	Lower limit	Total income	Upper limit	Relative standard error
	R million			%
Wholesale sales of motor vehicles	45 082	47 210	49 338	2,3
Retail sales of motor vehicles	328 691	344 208	359 725	2,3
Maintenance and repair of motor vehicles	27 964	30 150	32 336	3,7
Sales of new motor vehicle parts and accessories	59 629	63 354	67 079	3,0
Sales of used motor vehicle parts and accessories	3 169	3 461	3 753	4,3
Sales, maintenance and repair of motorcycles and related accessories	3 661	4 195	4 729	6,5
Retail sales of automotive fuel	172 984	186 510	200 036	3,7
Total	657 791	679 088	700 383	1,6

Non-sampling errors

Inaccuracies may occur because of imperfections in reporting by enterprises and errors made in the collection and processing of the data. Inaccuracies of this kind are referred to as non-sampling errors. Every effort is made to minimise non-sampling errors by careful design of questionnaires, testing them in pilot studies, editing reported data and implementing efficient operating procedures. Non-sampling errors occur in both sample surveys and censuses.

Rounding of figures

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

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 <i>n</i> largest enterprises to the total income.
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 2018.
Enterprise	A legal entity or a combination of legal units that includes and directly controls all functions necessary to carry out its activities.
Full-time employees	Full-time employees are those (permanent, temporary or casual) who normally work 40 hours or more per week.
Labour brokers	Agents who recruit and administer workers on behalf of the enterprise. They do not provide any other service.
Motor vehicles	Motor vehicles include cars, trucks, aircraft, boats, trailers, locomotives and other transport equipment.
Net profit or loss after tax	Net profit or loss after tax is derived as: Total income plus closing value of inventories minus total expenditure minus opening value of inventories minus company tax
Net profit or loss before tax	Net profit or loss before tax is derived as: Total income plus closing value of inventories minus total expenditure minus opening value of inventories

Other expenditure	<p>Includes:</p> <p>Accommodation; 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; 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; research and development; royalties, franchise fees, copyright, trade names, trademarks and patent rights paid; security services; skills development levy; staff training; subscriptions; travelling and other expenditure.</p>
Other vehicles	<p>Other vehicles includes:</p> <ul style="list-style-type: none">- Trailers and semi-trailers for the transport of goods (e.g. tankers, carriers)- Caravan-type trailers and semi-trailers used for housing or camping or transport of passengers- Other special purpose vehicles (e.g. ambulances, hearses, fire engines, golf carts)
Other income	<p>Includes:</p> <p>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>
Part-time employees	<p>Part-time employees are those (permanent, temporary or casual) who usually work less than 40 hours per week.</p>
Profit margin	<p>Profit margin is derived as:</p> <p>Net profit after tax <i>Divided by</i> turnover <i>Multiplied by</i> 100</p>
Statistical unit	<p>A statistical unit is a unit of observation or measurement for which statistical data are collected or derived.</p>
Stratum	<p>A stratum is constructed by concatenating the SIC classification and size group variables.</p>
Temporary employees	<p>Temporary employees are 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">• value of sales of goods;• amount received for services rendered;• rent and lease payments received for land and buildings; and• rent, leasing and hiring received for machinery, vehicles and other equipment.
Working proprietors	<p>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.</p>
Zero values	<p>All rand values less than R500 000.</p>