Trends in South African manufacturing production, employment and trade

Department of Research and Information

Fourth Quarter 2009
CONTENTS

Selected trade trends:

- Introduction.................................................................................................................................................. 3
- Trade balance................................................................................................................................................ 3
- Composition of trade................................................................................................................................... 3
- Regional trade............................................................................................................................................... 4
- Trade balance per region............................................................................................................................... 6

Trade focus: Africa’s trade with the BRIC countries ......................................................................................... 10

Manufacturing sector performance:

- Physical volume of production.................................................................................................................. 13
- Production capacity utilisation..................................................................................................................... 15
- Employment.................................................................................................................................................. 16
- Exports.......................................................................................................................................................... 17
- Imports.......................................................................................................................................................... 18
- Total manufacturing ..................................................................................................................................... 19

Performance of manufacturing sub-sectors:

  - Food.......................................................................................................................................................... 20
  - Beverages..................................................................................................................................................... 21
  - Tobacco....................................................................................................................................................... 22
  - Textiles......................................................................................................................................................... 23
  - Wearing apparel......................................................................................................................................... 24
  - Leather and leather products....................................................................................................................... 25
  - Footwear...................................................................................................................................................... 26
  - Wood and wood products............................................................................................................................ 27
  - Paper and paper products............................................................................................................................. 28
  - Printing, publishing and recorded media ..................................................................................................... 29
  - Coke and refined petroleum products......................................................................................................... 30
  - Basic chemicals.......................................................................................................................................... 31
  - Other chemical and man-made fibres........................................................................................................... 32
  - Rubber products.......................................................................................................................................... 33
  - Plastic products.......................................................................................................................................... 34
  - Glass and glass products............................................................................................................................... 35
  - Non-metallic mineral products..................................................................................................................... 36
  - Basic iron and steel..................................................................................................................................... 37
  - Basic non-ferrous metallic products............................................................................................................ 38
  - Metal products excluding machinery........................................................................................................... 39
  - Machinery and equipment............................................................................................................................ 40
  - Electrical machinery................................................................................................................................. 41
  - TV, radio and communication equipment.................................................................................................. 42
  - Professional and scientific apparatus........................................................................................................ 43
  - Motor vehicles, parts and accessories........................................................................................................ 44
  - Other transport equipment......................................................................................................................... 45
  - Furniture...................................................................................................................................................... 46
  - Other manufacturing................................................................................................................................. 47
  - Acronyms and data sources......................................................................................................................... 48
**Introduction**

The global financial and economic crisis brought to an abrupt end the longest upswing phase in South Africa’s recorded economic history. Domestic economic activity slowed further in the first semester of 2009, with the economy officially entering a recession during the first quarter of the year. Weak domestic and export demand resulted in production levels declining across most sectors of the economy, with only agriculture, construction, government and community services recording increases during the first six months of 2009 relative to the previous semester. The decline in economic activity during the first quarter of 2009 was the largest since 1984, recording an annualised 6.4% contraction in real terms compared to the fourth quarter of 2008. Economic activity during the first semester of 2009 was 2% lower than in the corresponding period last year.

**Trade balance**

The deficit on South Africa’s balance of trade narrowed significantly to R18.9 billion in the first half of 2009, compared to the R80.7 billion deficit recorded over the corresponding period in 2008. This “improvement” can be ascribed to the steep drop in merchandise imports as South African household spending came under severe pressure and private sector investment activity decelerated substantially. Considerably lower crude oil prices also resulted in a much reduced import bill. Subdued global demand as a result of the unfolding crisis led to a poor export performance.

**Composition of trade**

Exports from South Africa recorded an average nominal growth rate of 15.1% per annum over the six-year period to 2008. This growth trend was abruptly broken as the worldwide economic downturn took a toll on global trade flows. Consequently, South Africa’s total exports fell by 16.6% in the first six months of 2009 compared to the corresponding period in 2008, with a considerable 31.6% decline in intermediate goods exports. South Africa’s export basket is overwhelmingly dominated by intermediate goods (including raw materials), which represented 67.7% of total annual export earnings, on average, over the six years to 2008. Intermediate exports were also the fastest growing export category, with a 17% annual growth rate recorded over the same period. Such exports were dominated by mineral products such as gold, coal, iron and its concentrates, as well as platinum and ferro-alloys. Products such as motor vehicles, maize and fruits make up the bulk of consumer goods exports, while centrifuges, aluminum plates, motor vehicle parts and accessories, as well as machinery, top the list of capital goods exports.
Imports into South Africa grew at an average nominal growth rate of 18.6% per annum over the six year period ending in 2008, driven mainly by strong growth in intermediate imports. The first six months of 2009, however, witnessed a 20.4% decline compared to the corresponding period in 2008, mainly as a result of a deteriorating domestic economic environment. The relative share of intermediate imports in South Africa’s overall import basket fluctuated between 47% and 52% over the six year period, while their value grew on average by 20.6% per annum over the same period. In the first half of 2009, intermediate imports accounted for 48.7% of total imports, while consumer goods and capital goods claimed 23.1% and 28.2% of the import basket, respectively. The sharp decline in intermediate imports experienced since the first half of 2008 can be attributed to several factors including: the slowing down in economic activity both locally and globally, which in turn led to lower production activity, and the fall in commodity prices such as crude oil.

The top imported intermediate products during the first half of 2009 were crude oil, motor vehicle components, medicaments and petroleum oils obtained from bituminous minerals. The leading imported consumer products during this period included motor cars, rice, as well as medical instruments and apparatus, while the top imported capital equipment included telephones for wireless networks, aircraft, data processing machines and spark combustion engines.

Regional trade

The regional distribution of South Africa’s trade with the rest of the world has changed noticeably over the past ten years, with Asia (including the Middle East) and the European Union (EU) exchanging positions as the former became the leading regional trading partner (with a 42.4% share of the total import basket in the first half of 2009). Imports from Asia increased from R41.6 billion in 1998 to almost R310 billion in 2008. However, Asian imports were 20.7% lower in the first half of 2009 than in the corresponding period a year earlier. Imports from the rest of the African continent fell by 34.6% over the same period, with imports from other member states of the Southern
Selected trade trends

African Development Community (SADC) declining by approximately 45%. This was in sharp contrast to imports from European countries that are not members of the EU (referred to in the graphs as “Other Europe”), which recorded strong growth of 20.4% during the same period, particularly in categories such as other mining, non-basic chemicals and man-made fibres, as well as machinery and equipment.

The majority of South Africa’s imports from Asia originate from China, Saudi Arabia and Japan, with a combined 53.5% share of total imports from the Asian region. The leading sources of imports in the EU include Germany, the United Kingdom and France, with a combined 58.2% share of overall imports from this regional block. In Africa, Nigeria, Angola and Mozambique account for a 67.4% share of South Africa’s imports from the rest of the continent. Imports from the North American Free Trade Agreement (NAFTA) region are dominated by the United States of America (USA), with about 87% of the total.

The European Union and Asia have remained the leading regional destinations for South Africa’s exports over the past ten years, each accounting for nearly a 30% share of total exports in 2008. The first half of 2009, however, saw Asia surge ahead as the leading export destination, with 25.5% of South Africa’s overall exports destined for this region, as compared to the 20.9% share claimed by the European Union.

South Africa’s exports to Asia increased seven-fold between 1998 and 2008, from R27.5 billion to R188.9 billion, thus representing an average annual growth of 21.3% during this period. China, Japan and India, with a combined share of 68.5%, take up the bulk of South Africa’s exports into Asia, with China alone claiming more than half of this share. The top export destinations in the European Union include Germany, the United Kingdom and the Netherlands, with a 62% combined share. The leading export destinations in Africa include Mozambique, Zimbabwe and Zambia, with a 42.2% combined share of South Africa’s exports to the rest of the continent. Exports to NAFTA are dominated by the USA, which accounts for over 90% of South Africa’s exports to this regional trade bloc.

The worldwide recession has affected South Africa’s export drive into most regions, with the exception of the European region outside of the EU, as well as the rest of the African continent, which recorded growth rates of 58.3% and 2.6%, respectively, in the first half of 2009 relative to the corresponding period a year earlier. The drop in exports was particularly evident in Oceania (including Australia, New Zealand and the islands of Melanesia, Micronesia and Polynesia) and in NAFTA, with contractions of 55.2% and 41.9%, respectively.
Trade balance by region

South Africa has enjoyed a trade surplus with the rest of the African continent for many years and with the NAFTA region from 2004 until the first semester of 2008. Substantial trade deficits have been recorded in recent years with the Asian region, the European Union and, to a lesser extent the Americas outside of NAFTA.

The balance of trade between South Africa and each of the seven major regions, as well as the leading traded product categories, are illustrated in the following graphs.
Trade trends with major regional blocs

SA trade balance with Africa

Top traded products: 2009, semester 1

SA trade balance with Asia

Top traded products: 2009, semester 1

SA trade balance with the EU

Top traded products: 2009, semester 1
Trade trends with major regional blocs

SA trade balance with Europe (excl EU)

Top traded products: 2009, semester 1

SA trade balance with NAFTA

Top traded products: 2009, semester 1

SA trade balance with other Americas

Top traded products: 2009, semester 1
Trade trends with major regional blocs

SA trade balance with Oceania

Top traded products: 2009, semester 1
Trade focus: Africa’s trade with the BRIC countries

Africa’s trade with the BRIC economies is gaining momentum

Africa’s trade with the world’s four largest emerging markets, namely Brazil, Russia, India and China (collectively known as the BRIC countries), has grown from US$20.3 billion in 2001 to about US$162 billion in 2008. The significance of the BRIC countries in the world is demonstrated by their increasing share in global economic activity over time. Their combined share of global gross domestic product (GDP) stood at 22.3% in 2008, whilst accounting for 13.3% of world exports of goods and services in the same year at purchasing power parity. Moreover, in 2008, the BRICs accounted for 42.6% of the global population.

Brazil’s trade with the African continent has expanded significantly over time, amounting to approximately US$22.6 billion in 2008. This placed Brazil in 10th position within the list of Africa’s top global trading partners. Brazil’s imports from Africa are largely sourced from countries that are well endowed with energy and other resources, such as Nigeria, Angola and Algeria, with the specific imported products being crude petroleum oils and fertilisers. Brazil exports mainly sugars and sugar confectionery products, meat and edible meat offal, vehicles, as well as mineral fuels and oils to the African continent.

Russia’s trade with Africa has also increased in importance despite strong competition from China and Africa’s traditional trading partners such as the United States and the European Union. In an attempt to enhance its trade with the least developed countries, the Russian Federation introduced a Preferential Trade Agreement. The latter allows for preferential tariff treatment on certain goods primarily sourced from least developed nations, including African countries. Russia imports largely edible fruits and nuts, cocoa and cocoa products from Africa, whereas the African continent imports mainly wheat and barley, sulphur, mineral fuels and oils from Russia.

A substantial portion of Africa’s trade with India has been conducted through companies located or represented in South Africa. Over the years, multinationals such as Tata, Mahindra & Mahindra, Ranbaxy, Reliance and ArcelorMittal entered the African market, with a particular focus on South Africa. India has not only been interested in securing energy assets in Africa, but also in advancing bilateral trade. Earlier this year, India expressed a keen interest in enhancing its presence in Africa as well as in growing its export share in the continent following its growing production of generics. African exports to India in recent years have included...
mineral fuels and oils, gold, platinum, precious stones, metals and coins. Indian exports to Africa, in turn, have consisted largely of petroleum products (not crude), vehicles and pharmaceutical products.

**China** has effectively become the African continent’s strategic and largest trading partner. According to the International Trade Centre, trade between China and the African continent grew more than ten-fold, from a mere US$8.6 billion in 2001 to US$96.8 billion by 2008. The East Asian giant accounted for almost 60% of Africa’s overall trade with the BRIC countries in 2008. Electrical and electronic equipment, machinery and equipment, as well as vehicles dominate Africa’s imports from China. On the other hand, approximately 72% of the continent’s exports to China consist of crude petroleum oils, complemented to a lesser extent by petroleum gasses. The promotion of two-way trade and investment between the Asian giant and African countries is one of the key objectives of the “strategic partnership” envisaged by the Forum on China-Africa Cooperation (FOCAC).

**South Africa’s trade with the BRIC economies is dominated by China and India**

South Africa’s trade with the BRIC economies (i.e. Brazil, Russia, India and China) has expanded enormously over the past eight years, but is overwhelmingly dominated by trade with China and, to a much lesser extent, India.

The progressive strengthening of South Africa’s trade and investment relations at the bilateral level with each of these large emerging markets, as well as the IBSA initiative between India, Brazil and South Africa to promote South-South cooperation and exchange, have contributed to this trade performance.

South Africa’s imports from **Brazil** increased from US$154 million in 2004 to US$201 million in 2008. The imported products consisted mainly of commodities, machinery and equipment. Over the same period, South Africa’s exports to Brazil more than doubled from US$38 million to almost US$80 million, with the top product categories being ferro-alloys and motor vehicle components. The Preferential Trade Agreement (PTA) concluded between the Southern African Customs Union (SACU, which comprises Botswana, Lesotho, Namibia, South Africa and Swaziland) and the Mercado Común del Sur (MERCOSUR or MERCOSUL, comprising Argentina, Brazil, Paraguay and Uruguay) is expected to enhance trade flows between the two regional block to a considerable extent.
Trade focus: Africa’s trade with the BRIC countries

South Africa’s imports from Russia expanded substantially from US$40 million in 2004 to US$301 million in 2008. The bulk of the imported products were mineral fuels and oils, including crude petroleum oils, as well as fertilisers. South Africa’s exports to Russia, in turn, grew from US$97 million in 2004 to almost US$240 million by 2008. The leading exports to Russia included edible fruits and nuts, machinery and mechanical appliances.

India is South Africa’s 6th largest trading partner in Asia, with the total trade between the two countries having more than doubled from US$1.2 billion in 2004 to US$4.4 billion in 2008. India’s principal imports from South Africa last year were inorganic chemicals (principally phosphoric acid), coal and coal products. South Africa’s imports from India, in turn, were dominated by petroleum (not crude) and petroleum products, electrical and electronic equipment, and to a lesser extent pharmaceutical products. Trade has been supported by cooperation agreements between the two countries in various sectors, with the IBSA initiative providing significant momentum. Negotiations are underway for the Southern African Customs Union (SACU) to enter into a Preferential Trade Agreement with India. This is expected to boost Indian exports to SACU and to encourage Indian companies to do business with, and invest in Southern Africa.

China overtook the United States as South Africa’s largest export destination since the start of 2009, as economic and trade relations between the two countries intensified. China’s imports from South Africa are dominated by ores (specifically iron ores and concentrates), as well as iron and steel, including ferro-alloys and flat-rolled products of stainless steel. South Africa’s leading imports from China were electrical machinery and electronic equipment, electrical appliances, computing and printing equipment. According to the International Trade Centre, overall trade between South Africa and China increased from US$4.5 billion in 2004 to almost US$14 billion in 2008.

The bilateral relationship has been progressively strengthened since the Pretoria Declaration on the Partnership between the People’s Republic of China and the Republic of South Africa, which was signed in 2000. The two countries established a Strategic Partnership in 2004 and adopted a cooperation programme to deepen such a partnership in Cape Town in 2006. A Joint Ministerial Commission has provided an effective platform for China and South Africa to engage more regularly on economic issues, while South African President Jacob Zuma and his Chinese counterpart, President Hu Jintao, agreed in New York, in September 2009, to deepen bilateral relations and boost cooperation between the two countries in various fields.
Introduction

A steadily declining share in South Africa’s gross domestic product (GDP) since the early 1990s resulted in the manufacturing sector being overtaken by the financial and business services sector as the largest sector in the economy in 2003. The significance of the manufacturing sector is portrayed by its 17.2% contribution to nominal GDP in the second quarter of 2009, whilst employing approximately 1.43 million people in 2008 (equivalent to 11.3% of the total labour force). South Africa’s re-integration into the global economy since 1994 presented a multitude of trade opportunities, with the manufacturing sector playing an increasingly important role in terms of exports. Whereas manufactured exports accounted for only 36% of overall merchandise exports in 1990, this share rose rapidly over the past decade to just over 58% by 2008. However, it declined to around 53% in the second quarter of 2009 on the back of reduced global demand in light of the economic crisis.

South Africa’s manufactured export basket is highly concentrated from a sectoral perspective, with the basic iron and steel sub-sector accounting for 15.5% of overall manufactured exports, followed by motor vehicles, parts and accessories with a 15.4% share and the machinery and equipment sub-sector with 9.8% (refer to the graph on page 17). Combined, these three highly export-oriented sub-sectors represent just over 40% of all manufactured exports, with the main destinations for their products being China, the USA and Europe.

Manufactured goods account for the majority of the import basket, representing some 82% of overall merchandise imports in the second quarter of 2009. South Africa’s heavy reliance on imported capital goods (particularly machinery and equipment), result in the capital goods category accounting for the majority share of overall imports, whilst intermediate goods and consumer items also carry significant weights in the import basket.

Physical volume of production

Weak consumer spending, a continued reduction in inventories and lower fixed investment activity reduced demand for manufactured products and thus led to lower production volumes in the first half of 2009. Manufacturers have been reducing their inventories since the latter part of 2007, as domestic demand started faltering in reaction to interest rate increases from June 2006 onwards. As the global credit crisis subsequently unfolded in the United States and United Kingdom, the trend was compounded.

Excessive levels of indebtedness, high interest rates, reduced net wealth and job insecurity or retrenchments have weakened consumer spending dramatically in recent times. South African households have been postponing big ticket item purchases, impacting on the demand for durable goods and certain semi-durable items. Spending on non-durable goods has been less impacted upon, as these are usually items of necessity. However, even in this category the consumer has tended to “trade down” to cheaper products. Some semi-durable spending is being supported by households cutting back on dispensable luxuries, such as overseas
vacations, which may result in higher purchases of items like home entertainment products.

The sub-sectors that reported the largest contractions in production volumes in the first half of 2009, relative to the same period in 2008, are heavily dependent on international demand, such as the automotive sub-sector and related industries, which were adversely impacted upon by lower consumer and corporate spending worldwide. The decline in investment activity in South Africa, and more importantly across the globe, has been particularly impacting on: the basic iron and steel sub-sector, which contributes 7.7% to overall manufacturing production and recorded a 42.4% decline in production volumes in the first half of 2009, relative to the same period in 2008; the basic chemicals sub-sector, with a 4.5% contribution to manufacturing sector output and a 30.5% drop in production in the first semester of the year; as well as the machinery and equipment sub-sector, which accounts for 6.1% of overall manufacturing production and recorded a 21% contraction in output in the first six months of 2009 compared to the same period last year. South African as well as foreign consumer and investment expenditure remain under severe pressure despite steep interest rate cuts and sizeable stimulus packages provided by most of the world’s largest economies.

South Africa’s wearing apparel and textiles sub-sectors have been under pressure for several years, largely due to aggressive foreign competition in the local market and a gradual loss in domestic competitiveness relative to global counterparts, particularly in Asia. The economic downturn and subsequent developments have compounded their difficulties, particularly as the Rand strengthened, imported items became cheaper, local labour costs increased and the overall competitiveness of these sub-sectors was further eroded.
The continued reduction in inventories will eventually result in manufacturing production having to rise with the first signs of an upturn in demand. Manufacturing volumes have risen in recent months in parts of the world, but this has mainly been as a result of the stimulus packages that boosted demand to some extent. However, signs of sustained demand are still lacking, especially from the consumer side. The South African manufacturing sector’s recovery will be highly dependent on the revival of international demand, both consumer and industrial demand, as well as on the resumption of local consumer spending and private sector investment activity. Manufacturing activity is expected to respond fairly rapidly to an increase in domestic household demand or export demand, since inventories have been significantly run down.

**Production capacity utilisation**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Capacity Utilisation (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total manufacturing</td>
<td>77</td>
</tr>
<tr>
<td>Electrical machinery</td>
<td>84</td>
</tr>
<tr>
<td>Footwear</td>
<td>92</td>
</tr>
<tr>
<td>Furniture</td>
<td>89</td>
</tr>
<tr>
<td>Plastic</td>
<td>82</td>
</tr>
<tr>
<td>Food</td>
<td>80</td>
</tr>
<tr>
<td>Radio, television</td>
<td>87</td>
</tr>
<tr>
<td>Communication apparatus</td>
<td>87</td>
</tr>
<tr>
<td>Printing, publishing &amp; recorded media</td>
<td>79</td>
</tr>
<tr>
<td>Coke &amp; refined petroleum products</td>
<td>84</td>
</tr>
<tr>
<td>Other chemicals</td>
<td>76</td>
</tr>
<tr>
<td>Other transport equipment</td>
<td>76</td>
</tr>
<tr>
<td>Wearing apparel</td>
<td>80</td>
</tr>
<tr>
<td>Beverages</td>
<td>77</td>
</tr>
<tr>
<td>Paper &amp; paper products</td>
<td>87</td>
</tr>
<tr>
<td>Non-metalic minerals</td>
<td>81</td>
</tr>
<tr>
<td>Glass &amp; glass products</td>
<td>87</td>
</tr>
<tr>
<td>Wood &amp; wood products</td>
<td>82</td>
</tr>
<tr>
<td>Rubber</td>
<td>80</td>
</tr>
<tr>
<td>Professional equipment</td>
<td>82</td>
</tr>
<tr>
<td>Basic chemicals</td>
<td>79</td>
</tr>
<tr>
<td>Textiles</td>
<td>73</td>
</tr>
<tr>
<td>Metal products (excl machinery)</td>
<td>74</td>
</tr>
<tr>
<td>Basic non-ferrous metals</td>
<td>81</td>
</tr>
<tr>
<td>Leather &amp; leather products</td>
<td>69</td>
</tr>
<tr>
<td>Other manufacturing groups</td>
<td>80</td>
</tr>
<tr>
<td>Machinery</td>
<td>75</td>
</tr>
<tr>
<td>Motor vehicles parts &amp; accessories</td>
<td>69</td>
</tr>
<tr>
<td>Basic iron &amp; steel</td>
<td>58</td>
</tr>
<tr>
<td>Other transport equipment</td>
<td>76</td>
</tr>
<tr>
<td>Total manufacturing</td>
<td>77</td>
</tr>
</tbody>
</table>

Changes in the utilisation of production capacity reflect the relationship between physical production levels and the level of investment or divestment in a particular industry. In certain industries, it may be fairly easy to expand or reduce production capacity in line with final demand, while this is not likely to be the case in capital intensive sub-sectors. The sharp reduction in the utilisation of production capacity in the basic iron and steel sub-sector (a 21.8 percentage point decline to 58%) is a reflection of the much lower demand for its products, particularly as fixed investment activity contracted throughout the globe, including South Africa. The decision to retain production capacity in this sector is indicative of the industry’s expectations of a recovery in demand.

The motor vehicles and components sub-sector is facing its greatest crisis on record, hence the very low utilisation of production capacity (at 69%). However, recent announcements regarding capital investments in
the South African automotive industry are indicative of its relative optimism over the medium to long term. Capacity utilisation in the wearing apparel and textiles sub-sectors has declined further, despite the recent closure of sizeable operations. As demand for furniture declined in reaction to recessionary conditions locally and abroad, domestic furniture manufacturers have not been as optimistic as their counterparts in the basic iron and steel industry. A reduction in production capacity provides reasons for serious concern as it may be permanently lost and hamper the speed and extent of an eventual recovery.

**Employment**

At the end of 2008, approximately 1.43 million people were employed in the manufacturing sector, or approximately 51 000 less than in 2007. Any employment gains recorded at the start of 2008 were reversed by year-end. A further 221 000 jobs were lost in the South African manufacturing sector in the first three quarters of 2009, on the back of sharply curtailed production volumes and reduced capacity utilisation.

Despite the significant drop in production levels and idle capacity in the motor vehicles and parts sub-sector, which accounts for 9.1% of overall manufacturing sector employment, only a marginal decline in employment was reported in 2008 relative to the previous year. This is perhaps indicative of auto manufacturers not necessarily laying off workers in an effort to retain skills, as they anticipate a recovery in demand. Lower production in the labour-intensive wearing apparel and textiles sub-sectors, in conjunction with idle production capacity, have resulted in a considerable cut in employment levels. Since a large portion of the jobs in these sub-sectors are in the low- or semi-skilled categories, employers are less concerned with worker retention.

![Employment change in manufacturing chart](chart.png)

**Employment change in manufacturing**

2008 compared to 2007

Total manufacturing (100.0)

- Coke and refined petroleum products (1.4)
- Paper and paper products (2.7)
- Basic iron and steel (3.7)
- Other transport equipment (0.9)
- Electrical machinery (3.1)
- Rubber products (1)
- Food (11.9)
- Machinery and equipment (8.1)
- Basic chemicals (1.5)
- Other chemicals and man-made fibres (3.4)
- Leather and leather products (0.5)
- Motor vehicles, parts and accessories (9.1)
- Printing, publishing and recorded media (3.8)
- Beverages (3.8)
- Wood and wood products (5.2)
- Metal products excluding machinery (9.7)
- Footwear (0.8)
- Plastic products (2.6)
- Glass and glass products (0.7)
- Television, radio and communication equipment (0.5)
- Textiles (4)
- Basic non-ferrous metals (1.6)
- Non-metallic minerals (4.9)
- Other industries (5.3)
- Furniture (2.9)
- Wearing apparel (6.2)

Figures in brackets refer to the sub-sector's percentage share in manufacturing employment.
Weaker demand for South Africa’s export products and lower domestic investment activity have impacted on production volumes in various other sub-sectors of manufacturing and consequently on employment levels. For instance, reduced activity in the building industry and the steep decline in motor vehicle production have resulted in lower demand for glass and plastic products, with the respective sub-sectors reporting significant cuts in employment. Reduced fixed investment activity both locally and abroad has also impacted on demand for structural building products such as basic iron and steel, basic non-ferrous metals, as well as non-metallic minerals. Consequently, these sub-sectors have also been reporting lower employment levels.

**Exports**

The Rand’s strengthening since the start of 2009 has hampered the competitiveness of South Africa’s manufactured export products, compounding the challenges associated with sharply weaker global demand. In the first semester of 2009, manufactured exports declined by just over 23.5% compared to the same period in 2008, with the largest decline being recorded in the basic iron and steel sub-sector (a 47.1% contraction in exports), which is indicative of the massive slowdown in infrastructure development and global manufacturing production. The basic iron and steel sub-sector accounts for 15.5% of overall manufactured exports. The enormous increase in tobacco exports may be associated with better harvests locally or poor output levels in other countries, such as Zimbabwe, rather than a significant increase in international demand. The consumption-inducing incentives provided by the USA and some European countries, where subsidies are paid for the purchase of new vehicles, have resulted in a rise in motor vehicle sales, but this is not likely to be sustainable. The implications for South Africa are that exports of motor vehicles may remain depressed for quite some time.
Economic activity remains weak in most parts of Europe and in the USA, although there are signs of recovery, while the Chinese government recently curtailed investments in certain industries in an attempt to curb over-capacity. Furthermore, exchange rate volatility and excessive Rand strength in recent months is posing a serious threat to the sustainability of export-oriented enterprises. These factors indicate that the demand for manufactured exports may remain under considerable pressure in the short- to medium-term.

**Imports**

During the first six months of 2009, imports of manufactured products declined by 19.2% relative to the same period in 2008. This reflects the slowdown in local investment activity, which has reduced the demand for capital goods imports, as well as the duress facing households, who are shying away from dispensable consumer items. Imports of motor vehicles, parts and accessories (15% of overall imports of manufactured products) have fallen sharply (-36.5%) in reaction to plummeting new vehicle sales in South Africa and, where imports of components are concerned, due to the overall drop in local vehicle production. The 17.5% fall in machinery and equipment imports (20.7% of manufactured imports) is indicative of lower capital expenditure in South Africa, with companies postponing expansions and upgrades until such time as the outlook for their industries improves.

Imports of consumer and intermediate goods will remain subdued until household spending revives. Such a recovery is likely to be slow, as the indebtedness of consumers will first have to moderate before spending accelerates. Exchange rate movements will also impact on the competitiveness of local products, and should be a key determinant of changes in import demand from South African manufacturers and consumers alike.
Production weight: 100

### Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

- Production: -16.0%
- Capacity utilisation: -6.9 (Percentage points)
- Employment (y/y): -3.4%
- Exports (R): -23.5%
- Imports (R): -19.2%

### Production trends

- Production index: 120
- Capacity utilisation (%): 95

### Employment trends

- Number (1000): 1600
- Employment: -16.0%
- Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

### Trade trends

- Exports: 160
- Imports: 140

### Export performance

- (2009: Semester 1 compared to 2008: Semester 1)

<table>
<thead>
<tr>
<th>HS2 Code: Sector description</th>
<th>Change in Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H71: Natural or cultured pearls, precious stones and metals</td>
<td>3 473.98</td>
</tr>
<tr>
<td>H22: Beverages, spirits and vinegar</td>
<td>631.93</td>
</tr>
<tr>
<td>H17: Sugars and sugar confectionery</td>
<td>621.22</td>
</tr>
<tr>
<td>H24: Tobacco and manufactured tobacco substitutes</td>
<td>486.73</td>
</tr>
<tr>
<td>H90: Optical, photo, measuring and medical equipment</td>
<td>465.08</td>
</tr>
<tr>
<td>H48: Paper &amp; paperboard, articles of pulp, paper and board</td>
<td>400.05</td>
</tr>
<tr>
<td>H11: Milling products, malt, starches, inulin, wheat gluten</td>
<td>389.93</td>
</tr>
<tr>
<td>H70: Glass and glassware</td>
<td>290.94</td>
</tr>
<tr>
<td>H30: Pharmaceutical products</td>
<td>201.39</td>
</tr>
<tr>
<td>H21: Miscellaneous edible preparations</td>
<td>186.56</td>
</tr>
</tbody>
</table>

### Major traded products

- **2009: Semester 1**

<table>
<thead>
<tr>
<th>HS2 code : Sector description</th>
<th>Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H84: Machinery and equipment, mechanical appliances</td>
<td>45 265.78</td>
</tr>
<tr>
<td>H85: Electrical machinery and electronic equipment</td>
<td>27 691.19</td>
</tr>
<tr>
<td>H87: Vehicles, parts and accessories</td>
<td>18 039.40</td>
</tr>
<tr>
<td>H86: Original motor vehicle equipment components</td>
<td>15 501.54</td>
</tr>
<tr>
<td>H27: Petroleum and petroleum products, excl. crude oil</td>
<td>10 410.56</td>
</tr>
</tbody>
</table>

### Top trading partners

- **2009: Semester 1**

<table>
<thead>
<tr>
<th>Country</th>
<th>Top import destinations' share</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>Top export destinations' share</td>
</tr>
<tr>
<td>Germany</td>
<td>USA</td>
</tr>
<tr>
<td>Japan</td>
<td>China</td>
</tr>
<tr>
<td>UK</td>
<td>Italy</td>
</tr>
<tr>
<td>France</td>
<td>Spain</td>
</tr>
<tr>
<td>Italy</td>
<td>Germany</td>
</tr>
<tr>
<td>USA</td>
<td>China</td>
</tr>
<tr>
<td>Germany</td>
<td>China</td>
</tr>
<tr>
<td>China</td>
<td>Zimbabwe</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>Zambia</td>
</tr>
<tr>
<td>Zambia</td>
<td>Mozambique</td>
</tr>
<tr>
<td>Mozambique</td>
<td>UK</td>
</tr>
</tbody>
</table>
Production trends

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume of production</th>
<th>Production capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>75</td>
<td>85</td>
</tr>
<tr>
<td>2003</td>
<td>80</td>
<td>90</td>
</tr>
<tr>
<td>2004</td>
<td>85</td>
<td>100</td>
</tr>
<tr>
<td>2005</td>
<td>90</td>
<td>110</td>
</tr>
</tbody>
</table>

Employment trends

<table>
<thead>
<tr>
<th>Year</th>
<th>Employment (y/y)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>-0.8%</td>
</tr>
<tr>
<td>2003</td>
<td>-0.3%</td>
</tr>
<tr>
<td>2004</td>
<td>0.6%</td>
</tr>
<tr>
<td>2005</td>
<td>21.3%</td>
</tr>
<tr>
<td>2006</td>
<td>-5.2%</td>
</tr>
</tbody>
</table>

Trade trends

<table>
<thead>
<tr>
<th>Year</th>
<th>Exports (R)</th>
<th>Imports (R)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2003</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2004</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Export performance

<table>
<thead>
<tr>
<th>HS4 Code</th>
<th>Change in Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H1701</td>
<td>609.10</td>
</tr>
<tr>
<td>H1103</td>
<td>306.72</td>
</tr>
<tr>
<td>H2009</td>
<td>115.98</td>
</tr>
<tr>
<td>H2106</td>
<td>77.21</td>
</tr>
<tr>
<td>H1905</td>
<td>65.84</td>
</tr>
<tr>
<td>H0303</td>
<td>57.00</td>
</tr>
<tr>
<td>H1806</td>
<td>56.04</td>
</tr>
<tr>
<td>H1208</td>
<td>54.34</td>
</tr>
</tbody>
</table>

Major traded products

- **Imports:**
  - H1006: Rice: 1 712.72 Rm
  - H2304: Soya-bean oil-cake and other solid residues: 1 120.49 Rm
  - H1511: Palm oil and its fractions, not chemically modified: 1 076.30 Rm
  - H0207: Meat, edible offal of domestic poultry: 781.47 Rm
  - H1604: Prepared or preserved fish, fish eggs, caviar: 613.13 Rm

- **Exports:**
  - H1701: Solid cane/ beet sugar & chemically pure sucrose: 1 257.46 Rm
  - H2008: Fruit, edible plant parts res, prepared/preserved: 756.54 Rm
  - H2009: Fruit and vegetable juices, not fermented/ spirited: 684.52 Rm
  - H0303: Fish, frozen, whole: 446.98 Rm
  - H0304: Fish fillets, fish meat, mince except liver, roe: 388.81 Rm

Exports total value (including others): 11 192.16 Rm

Imports total value (including others): 7 717.85 Rm

Top trading partners

- **Top import destinations' share**
- **Top export destinations' share**

**Major traded products:**
- **Imports:**
  - H1006: Rice: 1 712.72 Rm
  - H2304: Soya-bean oil-cake and other solid residues: 1 120.49 Rm
  - H1511: Palm oil and its fractions, not chemically modified: 1 076.30 Rm
  - H0207: Meat, edible offal of domestic poultry: 781.47 Rm
  - H1604: Prepared or preserved fish, fish eggs, caviar: 613.13 Rm

- **Exports:**
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  - H2008: Fruit, edible plant parts res, prepared/preserved: 756.54 Rm
  - H2009: Fruit and vegetable juices, not fermented/ spirited: 684.52 Rm
  - H0303: Fish, frozen, whole: 446.98 Rm
  - H0304: Fish fillets, fish meat, mince except liver, roe: 388.81 Rm

Exports total value (including others): 11 192.16 Rm

Imports total value (including others): 7 717.85 Rm

**Top trading partners:**
- Thailand: 20%
- Argentina: 15%
- Brazil: 10%
- Malaysia: 8%
- Indonesia: 6%
- China: 5%
- Netherlands: 4%
- Zimbabwe: 3%
- Mozambique: 2%
- Italy: 1%
- Japan: 1%
- USA: 1%
- Zambia: 1%
- UK: 1%
Production weight: 6.8

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

- Production: 1.8%
- Capacity utilisation: -3.0% (Percentage points)
- Employment (y/y): -2.5%
- Exports (R): 17.4%
- Imports (R): 32.3%

Production trends

- Production index (Volume of production: Production capacity)

Employment trends

- Number (1,000)

Trade trends

- R billion per quarter (current values)

Major traded products

- HS4 Code: Semester 1

Export performance

- (2009: Semester 1 compared to 2008: Semester 1)

Top trading partners

- 2009: Semester 1
Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

Production trends

*Included in Other manufacturing

Employment trends

*Included in Other manufacturing

Trade trends

R billion per quarter (current values)

Major traded products

2009: Semester 1

HS4 Code : Sector description | Rm
--- | ---
H2403: Tobacco, tobacco substitute products nes | 85.34
H2402: Cigars, cigarettes etc, tobacco/tobacco substitute | 80.39
Imports total value (including others) | 165.73
Exports total value (including others) | 804.72

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

HS4 Code : Sector description | Change in Rm
--- | ---
H2403: Tobacco, tobacco substitute products nes | 342.57
H2402: Cigars, cigarettes etc, tobacco/tobacco substitute | 144.15

Top trading partners

2009: Semester 1

France
China
Portugal
Zimbabwe
USA
Germany
Switzerland
Yemen
Egypt
Iran
Angola
Mal
UAE
Saudi Arabia

Top import sources' share
Top export destinations' share
Trend analysis: Semester 1, 2009 compared to Semester 1, 2008
-19.6% Production
-7.2% Capacity utilisation
-6.9% Employment (y/y)
-5.9% Exports (R)
1.7% Imports (R)

Production trends
- Production index
- Capacity utilisation (%)
- Volume of production
- Production capacity

Employment trends
- Number (1,000)

Trade trends
- R billion per quarter (current values)
- Exports
- Imports

Major traded products
- 2009: Semester 1
- HS4 Code: Sector description
- Rm
- Imports total value (including others)
- 3,401.22
- Exports total value (including others)
- 1,260.20

Export performance
- 2009: Semester 1 compared to 2008: Semester 1
- Change in Rm
- HS4 Code: Sector description

Top trading partners
- 2009: Semester 1
- China
- Pakistan
- India
- Germany
- Taiwan
- USA
- Turkey
- Italy
- Mozambique
- Belgium
- UK
- China
- Germany
- USA

Production weight: 1.6

Textiles

Exports
Imports

Top import sources' share
Top export destinations' share
Production trends

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008
-8.9% Production
-2.9% (Percentage points) Capacity utilisation
-15.0% Employment (y/y)
-15.0% Exports (R)
18.7% Imports (R)

Employment trends

Trade trends

R billion per quarter (current values)

Export performance
(2009: Semester 1 compared to 2008: Semester 1)

Major traded products
2009: Semester 1

Top trading partners
2009: Semester 1

Wearing apparel

Production weight: 2.3

Production index
Capacity utilisation (%)

Volume of production
Production capacity

Employment (1,000)

Imports total value (including others)
Exports total value (including others)

HS4 Code : Sector description

Imports
Exports

Exports
Imports

HS4 Code : Sector description

HS4 Code : Sector description

Change in
Rm

China
Mauritius
Bangladesh
India
Vietnam
Thailand
Indonesia
UK
USA
Zambia
Angola
Mozambique
UAE
DR Congo

0% 20% 40% 60% 80%

Top import destinations' share
Top export destinations' share
Leather and leather products

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

-28.0% Production
-9.8% (Percentage points) Capacity utilisation
-0.4% Employment (y/y)
-44.7% Exports (R)
15.8% Imports (R)

Production trends

Employment trends

Trade trends

Major traded products 2009: Semester 1

Export performance 2009: Semester 1 compared to 2008: Semester 1

Top trading partners 2009: Semester 1

Production weight: 0.6
Production trends

- Production index: 110
- Capacity utilisation (%): 90
- Volume of production
- Production capacity

Employment trends

- Number (1000): 20
- Employment (y/y): 13.4%
- Exports (R): 24.1%
- Imports (R): 13.4%

Trade trends

- Exports
- Imports

Export performance

- HS4 Code: Sector description
- Change in Rm
- H6404: Footwear with uppers of textile materials 3.24
- H6402: Footwear, with outer sole, upper rubber or plastic 3.00
- H6405: Footwear res, sole not leather, rubber or plastic 1.54
- H6403: Footwear with uppers of leather 1.06
- H6406: Parts of footwear, insoles, heel cushions, etc 0.79
- H6401: Waterproof footwear, rubber, plastic -0.03

Major traded products

- 2009: Semester 1
- HS4 Code: Sector description
- Rm

- H6402: Footwear, with outer sole, upper rubber or plastic 870.83
- H6403: Footwear with uppers of leather 821.98
- H6404: Footwear with uppers of textile materials 596.23
- H6406: Parts of footwear, insoles, heel cushions, etc 64.88
- H6405: Footwear res, sole not leather, rubber or plastic 43.78

- Imports total value (including others) 2,412.66
- Exports total value (including others) 81.37

Top trading partners

- 2009: Semester 1
- Country
- Top import sources' share
- Top export destinations' share

- China
- Vietnam
- Italy
- Indonesia
- India
- Brazil
- Thailand
- Zimbabwe
- Zambia
- Malawi
- Mozambique
- UK
- Angola
- DRC
Wood and wood products

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

- Production: -14.2%
- Capacity utilisation: -5.4% (percentage points)
- Employment (y/y): -5.3%
- Exports (R): -15.9%
- Imports (R): 18.2%

**Production trends**

![Production index graph](image)

**Volume of production**

<table>
<thead>
<tr>
<th>Year</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>80</td>
<td>84</td>
<td>88</td>
<td>92</td>
<td>94</td>
<td>96</td>
<td>100</td>
</tr>
</tbody>
</table>

**Capacity utilisation (%)**

<table>
<thead>
<tr>
<th>Year</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>80</td>
<td>84</td>
<td>88</td>
<td>92</td>
<td>94</td>
<td>96</td>
<td>100</td>
</tr>
</tbody>
</table>

**Employment trends**

![Employment number (1000) graph](image)

<table>
<thead>
<tr>
<th>Year</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>80</td>
<td>84</td>
<td>88</td>
<td>92</td>
<td>94</td>
<td>96</td>
<td>100</td>
</tr>
</tbody>
</table>

**Trade trends**

![R billion per quarter (current values) graph](image)

- Exports
- Imports

**Export performance**

(2009: Semester 1 compared to 2008: Semester 1)

<table>
<thead>
<tr>
<th>HS4 Code : Sector description</th>
<th>Change in Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H4410: Particle board, wood, ligneous material</td>
<td>29.23</td>
</tr>
<tr>
<td>H4402: Wood charcoal (including shell or nut charcoal)</td>
<td>12.88</td>
</tr>
<tr>
<td>H4601: Mats, screens, articles of plaiting materials</td>
<td>3.56</td>
</tr>
<tr>
<td>H4421: Articles of wood, nes</td>
<td>3.21</td>
</tr>
<tr>
<td>H4416: Wooden casks, barrels, vats, tubs, etc</td>
<td>2.51</td>
</tr>
<tr>
<td>H4411: Fibreboard of wood or other ligneous materials</td>
<td>2.10</td>
</tr>
<tr>
<td>H4414: Wooden frames for paintings, photographs, etc</td>
<td>0.58</td>
</tr>
<tr>
<td>H4417: Tools, broom handles, bodies, etc, of wood</td>
<td>0.42</td>
</tr>
<tr>
<td>H4419: Tableware and kitchenware of wood</td>
<td>0.20</td>
</tr>
<tr>
<td>H4413: Densified wood, in blocks, plates, strips or profile</td>
<td>0.19</td>
</tr>
</tbody>
</table>

**Top trading partners**

(2009: Semester 1)

- Malaysia (Top import source share)
- France (Top export destinations' share)
- China
- Indonesia
- Brazil
- Portugal
- Germany
- Japan
- UK
- Mozambique
- Australia
- Zimbabwe
- Zambia
- India

**Major traded products**

(2009: Semester 1)

<table>
<thead>
<tr>
<th>HS4 Code : Sector description</th>
<th>Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H4407: Wood sawn, chipped lengthwise, sliced or peeled</td>
<td>391.85</td>
</tr>
<tr>
<td>H4416: Wooden casks, barrels, vats, etc</td>
<td>230.53</td>
</tr>
<tr>
<td>H4411: Fibreboard of wood or other ligneous materials</td>
<td>110.88</td>
</tr>
<tr>
<td>H4412: Plywood, veneered panels, etc</td>
<td>107.98</td>
</tr>
<tr>
<td>H4408: Veneers and sheets for plywood etc &lt;6mm thick</td>
<td>90.82</td>
</tr>
</tbody>
</table>

**Imports total value (including others)**

1 311.58

**Exports total value (including others)**

1 249.54
Production weight: 3.8

**Paper and paper products**

**Trend analysis: Semester 1, 2009 compared to Semester 1, 2008**

<table>
<thead>
<tr>
<th>Category</th>
<th>Change</th>
<th>(Percentage points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production</td>
<td>-11.3%</td>
<td></td>
</tr>
<tr>
<td>Capacity utilisation</td>
<td>-3.8</td>
<td></td>
</tr>
<tr>
<td>Employment (y/y)</td>
<td>14.7%</td>
<td></td>
</tr>
<tr>
<td>Exports (R)</td>
<td>4.5%</td>
<td></td>
</tr>
<tr>
<td>Imports (R)</td>
<td>-6.8%</td>
<td></td>
</tr>
</tbody>
</table>

**Production trends**

![Graph showing production index and capacity utilisation (%).]

**Employment trends**

![Graph showing employment number (1 000).]

**Trade trends**

![Graph showing exports and imports in R billion per quarter (current values).]

**Export performance**

![Table showing change in HS4 Code: Sector description in Rm.]

**Major traded products**

![Table showing major traded products in 2009: Semester 1.]

**Top trading partners**

![Graph showing top trading partners' share and top import destinations' share.]
Production weight: 4.4

Production trends

- Trend analysis: Semester 1, 2009 compared to Semester 1, 2008
  - Production: -10.9%
  - Capacity utilisation: -1.1%
  - Employment (y/y): -2.5%
  - Exports (R): 11.1%
  - Imports (R): 0.6%

Production index

- Volume of production
- Production capacity

Employment trends

- Number (1,000)

Trade trends

- R billion per quarter (current values)

Export performance

- 2009: Semester 1 compared to 2008: Semester 1

Major traded products

- 2009: Semester 1

Top trading partners

- 2009: Semester 1
Production weight: 8.5

Coke and refined petroleum products

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

-4.5% Production capacity utilisation
-2.2 (percentage points) Employment (y/y)
20.0% Exports (R)
0.6% Imports (R)

Production trends

Volume of production
Production capacity

Employment trends

Number (1000)

Trade trends

R billion per quarter (current values)

Export performance
(2009: Semester 1 compared to 2008: Semester 1)

HS4 Code : Sector description Change in Rm
H2710: Petroleum oils, bituminous, distillates, except crude 103.51
H2712: Petroleum jelly and wax, other mineral waxes 101.40
H2713: Petroleum coke, bitumen & other oil millieu residues 8.57
H8401: Nuclear reactors, fuel elements, etc -0.15
H2706: Tar from coal, lignite or peat, other mineral tars -0.25
H2711: Petroleum gases & other gaseous hydrocarbons -20.15
H2704: Retort carbon, coke/semi-coke of coal, lignite, peat -24.47
H2844: Radioactive elements, isotopes, compounds etc -129.59

Major traded products
2009: Semester 1

<table>
<thead>
<tr>
<th>HS4 Code : Sector description</th>
<th>Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H2710: Petroleum oils, bituminous, distillates, except crude</td>
<td>9 256.35</td>
</tr>
<tr>
<td>H2713: Petroleum coke, bitumen &amp; other oil millieu residues</td>
<td>721.60</td>
</tr>
<tr>
<td>H2712: Petroleum jelly and wax, other mineral waxes</td>
<td>179.87</td>
</tr>
<tr>
<td>H2704: Retort carbon, coke/semi-coke of coal, lignite, peat</td>
<td>161.69</td>
</tr>
<tr>
<td>H2844: Radioactive elements, isotopes, compounds etc</td>
<td>25.30</td>
</tr>
<tr>
<td>Imports total value (including others)</td>
<td>10 346.89</td>
</tr>
<tr>
<td>H2710: Petroleum oils, bituminous, distillates, except crude</td>
<td>5 084.55</td>
</tr>
<tr>
<td>H2712: Petroleum jelly and wax, other mineral waxes</td>
<td>660.23</td>
</tr>
<tr>
<td>H2844: Radioactive elements, isotopes, compounds etc</td>
<td>438.41</td>
</tr>
<tr>
<td>H2713: Petroleum coke, bitumen &amp; other oil millieu residues</td>
<td>112.79</td>
</tr>
<tr>
<td>H2711: Petroleum gases &amp; other gaseous hydrocarbons</td>
<td>79.86</td>
</tr>
<tr>
<td>Exports total value (including others)</td>
<td>6 444.00</td>
</tr>
</tbody>
</table>

Top trading partners
2009: Semester 1

Netherlands: 10.2%
India: 3.4%
USA: 12.3%
Singapore: 8.5%
Turkey: 6.8%
Saudi Arabia: 8.2%
Zimbabwe: 7.9%
Zambia: 6.5%
Mozambique: 4.6%
USA: 3.1%
DRC: 2.6%
Angola: 1.9%
Germany: 1.3%

Top export destinations’ share
Top import sources’ share

IDC
Basic chemicals

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

-30.5% 
-6.6 (percentage points) 
-0.2% 
-27.8% 
-34.1%

Production 
Capacity utilisation 
Employment (y/y) 
Exports (R) 
Imports (R)

Production trends

Employment trends

Trade trends

Major traded products

Export performance

Top trading partners

Production weight: 4.5

HS4 Code : Sector description 
Rm

<table>
<thead>
<tr>
<th>HS4 Code : Sector description</th>
<th>Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H3901: Polymers of ethylene, in primary forms</td>
<td>807.83</td>
</tr>
<tr>
<td>H3907: Polycetals, polethers, etc, primary</td>
<td>738.22</td>
</tr>
<tr>
<td>H3102: Mineral or chemical fertilizers, nitrogenous</td>
<td>565.09</td>
</tr>
<tr>
<td>H3903: Polymers of styrene, in primary forms</td>
<td>401.16</td>
</tr>
<tr>
<td>H2934: Heterocyclic compounds, res</td>
<td>399.47</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HS4 Code : Sector description</th>
<th>Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H2809: Diphosphorus pentaoxide, phosphoric acids</td>
<td>1 706.31</td>
</tr>
<tr>
<td>H2901: Acyclic hydrocarbons</td>
<td>1 333.45</td>
</tr>
<tr>
<td>H3902: Polymers of propylene, olefins in primary forms</td>
<td>1 305.26</td>
</tr>
<tr>
<td>H2914: Ketones and quinones, their derivatives</td>
<td>574.27</td>
</tr>
<tr>
<td>H2905: Acyclic alcohols and their derivatives</td>
<td>562.33</td>
</tr>
</tbody>
</table>

Exports total value (including others) | 11 268.21 |

Imports total value (including others) | 10 697.19 |

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

HS4 Code : Sector description 
Change in Rm

<table>
<thead>
<tr>
<th>HS4 Code : Sector description</th>
<th>Change in Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H3901: Polymers of ethylene, in primary forms</td>
<td>231.48</td>
</tr>
<tr>
<td>H3904: Polymers of vinyl chloride, halogenated olefins</td>
<td>202.22</td>
</tr>
<tr>
<td>H3104: Mineral or chemical fertilizers, potassic</td>
<td>80.11</td>
</tr>
<tr>
<td>H2849: Carbies, whether or not chemically defined</td>
<td>55.74</td>
</tr>
<tr>
<td>H3206: Colouring matter res, inorganic luminophores</td>
<td>50.72</td>
</tr>
<tr>
<td>H2842: Salts of inorganic acids and peroxyoxaoids</td>
<td>25.26</td>
</tr>
<tr>
<td>H2832: Sulphites, thiosulphates</td>
<td>24.09</td>
</tr>
<tr>
<td>H2928: Organic derivatives of hydrazine/hydroxylamine</td>
<td>17.77</td>
</tr>
<tr>
<td>H3103: Mineral or chemical fertilizers, phosphatic</td>
<td>17.20</td>
</tr>
<tr>
<td>H2827: Chlorides, bromides, iodides, oxides thereof</td>
<td>13.43</td>
</tr>
</tbody>
</table>

Top trading partners

(2009: Semester 1)

<table>
<thead>
<tr>
<th>Country</th>
<th>Top import sources' share</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>8.9%</td>
</tr>
<tr>
<td>USA</td>
<td>6.7%</td>
</tr>
<tr>
<td>Germany</td>
<td>4.0%</td>
</tr>
<tr>
<td>Belgium</td>
<td>3.8%</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>2.9%</td>
</tr>
<tr>
<td>India</td>
<td>2.3%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>2.1%</td>
</tr>
<tr>
<td>China</td>
<td>12.3%</td>
</tr>
<tr>
<td>USA</td>
<td>9.1%</td>
</tr>
<tr>
<td>Brazil</td>
<td>3.9%</td>
</tr>
<tr>
<td>Belgium</td>
<td>3.3%</td>
</tr>
<tr>
<td>Zambia</td>
<td>2.9%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Top export destinations' share</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>12.3%</td>
</tr>
<tr>
<td>USA</td>
<td>9.1%</td>
</tr>
<tr>
<td>Brazil</td>
<td>3.9%</td>
</tr>
<tr>
<td>Belgium</td>
<td>3.3%</td>
</tr>
<tr>
<td>Zambia</td>
<td>2.9%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>2.1%</td>
</tr>
</tbody>
</table>
Production weight: 5.3

Other chemicals and man-made fibres

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008
- Production index: 7.4% (Percentage points)
- Capacity utilisation: -0.4%
- Employment (y/y): 1.7%
- Exports (R): 2.8%

**Production trends**

- Production index: 70
- Capacity utilisation (%): 82
- Volume of production: 75
- Production capacity: 135

**Employment trends**

- Number (1,000): 50
- Employment (y/y): -6.4% -2.8% -0.4%

**Trade trends**

- R billion per quarter (current values)
- Exports: 12.0
- Imports: 8.0

**Export performance**

- (2009: Semester 1 compared to 2008: Semester 1)
- Change in Rm

<table>
<thead>
<tr>
<th>HS4 Code : Sector description</th>
<th>Change in Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H3808: Insecticides, fungicides, herbicides etc (retail)</td>
<td>245.83</td>
</tr>
<tr>
<td>H3004: Medicaments, therapeutic, prophylactic use</td>
<td>241.45</td>
</tr>
<tr>
<td>H3209: Polymer based paints, aqueous varnishes</td>
<td>84.77</td>
</tr>
<tr>
<td>H3402: Organic surface active agents, excluding soap</td>
<td>73.18</td>
</tr>
<tr>
<td>H3401: Soaps</td>
<td>69.40</td>
</tr>
<tr>
<td>H3307: Shaving and toilet preparations nes, deodorizers</td>
<td>29.16</td>
</tr>
<tr>
<td>H3603: Safety or detonating fuses, detonators, igniters</td>
<td>26.49</td>
</tr>
<tr>
<td>H3305: Hair preparations</td>
<td>18.18</td>
</tr>
<tr>
<td>H3304: Beauty, make-up and skin care preparations</td>
<td>17.64</td>
</tr>
<tr>
<td>H3405: Polishes, creams, scouring pastes, etc</td>
<td>17.44</td>
</tr>
</tbody>
</table>

**Import performance**

- (2009: Semester 1 compared to 2008: Semester 1)
- Change in Rm

<table>
<thead>
<tr>
<th>HS4 Code : Sector description</th>
<th>Change in Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H3004: Medicaments, therapeutic, prophylactic use</td>
<td>5 908.52</td>
</tr>
<tr>
<td>H3808: Insecticides, fungicides, herbicides etc (retail)</td>
<td>1 796.25</td>
</tr>
<tr>
<td>H3002: Blood, antisera, vaccines, toxins and cultures</td>
<td>871.75</td>
</tr>
<tr>
<td>H3208: Insecticides, fungicides, herbicides etc (retail)</td>
<td>726.83</td>
</tr>
<tr>
<td>H3822: Composite diagnostic or laboratory reagents</td>
<td>708.38</td>
</tr>
</tbody>
</table>

**Major traded products**

- 2009: Semester 1
- HS4 Code : Sector description
- Exports total value (including others): 5 719.17
- Imports total value (including others): 18 401.37

**Top trading partners**

- 2009: Semester 1
- Top import sources' share
- Top export destinations' share

USA, Germany, France, UK, China, India, Switzerland, Zambia, Zimbabwe, Mozambique, Angola, Kenya, UK, USA
Production trends

Trade trends

Export performance

Top trading partners
**Production weight:** 2.7

**Plastic products**

**Trend analysis: Semester 1, 2009 compared to Semester 1, 2008**

- Production: 2.0% (2009) compared to 2008: 0.8%
- Capacity utilisation: 7.7% (2009) compared to 2008: 7.6%
- Employment (y/y): -5.9% (2009) compared to 2008: -0.8%
- Exports (R): 7.7% (2009) compared to 2008: -7.6%

**Production trends**

- Production index: 80 to 170
- Capacity utilisation (%): 74 to 82
- Volume of production: 80 to 170
- Production capacity: 80 to 170

**Employment trends**

- Number (1,000): 36 to 44
- Employment (y/y): 2.0% to 0.8%

**Trade trends**

- Exports (R billion per quarter): 0 to 2.5
- Imports (R billion per quarter): 0 to 2.5

**Export performance**

(2009: Semester 1 compared to 2008: Semester 1)

- HS4 Code: Sector description
- Change in Rm

<table>
<thead>
<tr>
<th>HS4 Code</th>
<th>Sector description</th>
<th>Change in Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H3920</td>
<td>Plastic plate, sheet, film not cellular, reinforced</td>
<td>727.79</td>
</tr>
<tr>
<td>H3926</td>
<td>Plastic articles nes</td>
<td>480.96</td>
</tr>
<tr>
<td>H3923</td>
<td>Containers, bobbins and packages, of plastics</td>
<td>381.38</td>
</tr>
<tr>
<td>H3919</td>
<td>Self-adhesive plates, sheets, film etc of plastic</td>
<td>331.65</td>
</tr>
<tr>
<td>H3917</td>
<td>Plastic tube, pipe, hose and fittings</td>
<td>307.39</td>
</tr>
<tr>
<td>H3916</td>
<td>Monofilament (&gt;1mm), rods, etc, of plastics</td>
<td>-5.18</td>
</tr>
<tr>
<td>H3918</td>
<td>Plastic floor, wall or ceiling covering, roll or tiles</td>
<td>0.51</td>
</tr>
<tr>
<td>H3922</td>
<td>Bathroom wares, of plastics</td>
<td>194.92</td>
</tr>
<tr>
<td>H3920</td>
<td>Plastic plate, sheet, film not cellular, reinforced</td>
<td>95.36</td>
</tr>
</tbody>
</table>

**Imports total value (including others): 2 985.51**

**Exports total value (including others): 1 166.75**

**Major traded products**

- 2009: Semester 1

**Top trading partners**

- 2009: Semester 1
Production weight: 1.0

Glass and glass products

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

Production: +1.1%
Capacity utilisation: -5.3 % (Percentage points)
Employment (y/y): -6.2%
Exports (R): +83.7%
Imports (R): -12.1%

Production trends

Employment trends

Trade trends

Major traded products

Export performance

Top trading partners

Production index
Capacity utilisation (%)
Volume of production
Production capacity

Number (1,000)

R billion per quarter (current values)

HS4 Code: Sector description
Change in
Rm

HS4 Code: Sector description
Rm

China
Germany
Italy
USA
France
Brazil
189.27
174.54
118.84
236.20
190.24
106.53

Imports total value (including others)
893.60

Imports
Exports

Exports total value (including others)
636.37

H7019: Glass fibres, glass wool and articles thereof
155.45

Italy
US
France
Brazil
UK
Angola
Mozambique
Belgium
Belgium
France
Germany

0% 5% 10% 15% 20% 25% 30% 35%

H7007: Safety glass (toughened, tempered, laminated)
67.56

H7010: Glass bottles, flasks, jars, phials, stoppers, etc.
63.33

H7005: Float glass, surface ground, polished glass
12.14

H7016: Glass blocks, bricks, tiles, leaded lights, etc.
2.72

H7013: Glassware for table, kitchen, toilet, decoration
1.70

H7017: Laboratory, hygienic/pharmaceutical glassware
1.12

H7011: Glass envelopes for electrical/electronic lamps etc
0.73

H7015: Unworked glasses for spectacles, clocks, etc
0.70

H7006: Cast, drawn/float glass sheet, edge worked/bent
0.63

Major traded products

2009: Semester 1

Exports (R)
Imports (R)

Exports total value (including others)

Exports total value (including others)

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

Change in
Rm

Major traded products

2009: Semester 1

Exports (R)
Imports (R)

Exports total value (including others)

Exports total value (including others)

Top trading partners

2009: Semester 1

China
Germany
Italy
USA
France
Brazil

0% 5% 10% 15% 20% 25% 30% 35%

Top import destinations' share

Top export destinations' share

Top trading partners

2009: Semester 1

China
Germany
Italy
USA
France
Brazil

0% 5% 10% 15% 20% 25% 30% 35%

Top import destinations' share

Top export destinations' share

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

Change in
Rm

Major traded products

2009: Semester 1

Exports (R)
Imports (R)

Exports total value (including others)

Exports total value (including others)

Top trading partners

2009: Semester 1

China
Germany
Italy
USA
France
Brazil

0% 5% 10% 15% 20% 25% 30% 35%
Production weight: 3.8

Non-metallic mineral products

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

-19.2% Production
-4.0 (Percentage points) Capacity utilisation
-7.7% Employment (y/y)
-19.3% Exports (R)
-35.5% Imports (R)

Production trends

Employment trends

Trade trends

Major traded products

Export performance

Top trading partners
Production weight: 7.7

Basic iron and steel products

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

- Production: -21.8% (Percentage points)
- Capacity utilisation: 4.1%
- Employment (y/y): -47.1%
- Exports (R): -10.4%

Production trends

Employment trends

Trade trends

Major traded products

2009: Semester 1

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

Major traded products

2009: Semester 1

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

HS4 Code : Sector description            Change in Rm
H7225: Flat-rolled alloy steel, width >600mm             1 444.63
H7208: Hot-rolled products, iron/steel, width >600mm, etc     531.16
H7210: Flat-rolled iron/steel, >600mm, clad, plated/coated     470.00
H7307: Pipe fittings, of iron or steel                      449.63
H7304: Tube/hollow profile, seamless iron/steel not cast       363.62
Imports total value (including others)                     5 191.00
H7202: Ferro-alloys                                         9 585.75
H7219: Rolled stainless steel sheet, width >600mm            3 006.84
H7208: Hot-rolled products, iron/steel, width >600mm, etc    1 461.11
H7207: Semi-finished products of iron or non-alloy steel      1 377.48
H7205: Granules and powders, of pig iron, iron or steel      901.33
Exports total value (including others)                      20 648.96

HS4 Code : Sector description            Change in Rm
H7207: Semi-finished products of iron or non-alloy steel      1 181.10
H7205: Granules and powders, of pig iron, iron or steel       693.03
H7208: Hot-rolled products, iron/steel, width >600mm, etc     323.00
H7213: Hot rolled bar, rod of iron/steel, in irregular coils  257.34
H7307: Pipe fittings, of iron or steel                        53.89
H7222: Bar, rod, stainless steel, angles, shapes/sections     21.64
H7214: Iron/steel bar, forged hot-rolled drawn, extruded      17.03
H7216: Angles, shapes & sections of iron/non-alloy steel      6.75
H7305: Pipe, welded iron/steel, diameter >406.4mm             1.47
H7227: Bar, rod, hot-rolled alloy steel, irregular coils      0.78

Top trading partners

2009: Semester 1

China
Germany
Austria
Sweden
Japan
France
USA
China
Taiwan
Germany
France
India
USA
Netherlands
Japan

0% 5% 10% 15% 20% 25% 30% 35%

Top import sources' share
Top export destinations' share
Production weight: 3.4

Basic non-ferrous metal products

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

- Production: -9.7%
- Capacity utilisation: -9.2 (Percentage points)
- Employment (y/y): -6.9%
- Exports (R): -18.9%
- Imports (R): -57.0%

Production trends

Employment trends

Trade trends

Export performance

Major traded products

Top trading partners

Production index

Capacity utilisation (%)

Volume of production

Production capacity

Number (1,000)

R billion per quarter (current values)

Major traded products

2009: Semester 1

HS4 Code : Sector description

Rm

Exports total value (including others)

Imports total value (including others)

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

HS4 Code : Sector description

Change in
Rm

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

Top trading partners

2009: Semester 1

Australia

Germany

China

Zambia

Zimbabwe

UK

USA

Japan

Switzerland

USA

UK

China

Germany

Hong Kong

Percentage points

-9.7% -9.2 -6.9%

-18.9% -57.0%

-18.9% -57.0%

-9.7% -9.2 -6.9%

-18.9% -57.0%

-18.9% -57.0%

-18.9% -57.0%

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-18.9% -57.0%

-18.9% -57.0%

-18.9% -57.0%

-18.9% -57.0%

-18.9% -57.0%
Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

-16.3% Production
-7.8% (Percentage points) Capacity utilisation
-5.5% Employment (y/y)
-4.8% Exports (R)
-6.8% Imports (R)

Production trends

Production index
Capacity utilisation (%)

Volume of production
Production capacity

Employment trends

Number (1,000)

Trade trends

R billion per quarter (current values)

Exports
Imports

Major traded products 2009: Semester 1

Rm

HS4 Code : Sector description

Imports total value (including others) 5 536.65
Exports total value (including others) 4 210.27

Export performance
(2009: Semester 1 compared to 2008: Semester 1)

Change in Rm

HS4 Code : Sector description

Exports
Imports

Top trading partners 2009: Semester 1

China
Germany
France
USA
Italy
India
Taiwan
Zimbabwe
Angola
Zambia
Mozambique
Ghana
DRC
Nigeria

Top import destinations’ share
Top export destinations’ share
Production weight: 6.1

Machinery and equipment

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

- Production: -22.7%
- Capacity utilisation: -12.9% (percentage points)
- Employment (y/y): 0.5%
- Exports (R): -41.8%
- Imports (R): -17.5%

Production trends

- Volume of production
- Production capacity

Employment trends

- Number (1'000)

Trade trends

- R billion per quarter (current values)

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

HS4 Code : Sector description | Change in Rm
--- | ---
H8481: Taps, cocks, valves for pipes, tanks, boilers, etc | 6.1
H8438: Industrial food and drink preparation machinery | 47.04
H8482: Ball or roller bearings | 46.51
H8437: Machines to clean, sort or mill seed, grain, etc | 46.40
H8424: Equipment to project, disperse liquid or powder | 32.55
H8477: Machinery for rubber, plastics industry | 32.19
H8473: Parts, except covers, for office machines | 26.58
H8431: Parts for use with lifting, moving machinery | 25.46
H8433: Harvesting, produce cleaning & grading machinery | 18.31
H8422: Machinery for dish washing, bottle washing, filling | 17.03

Top trading partners

2009: Semester 1

- China
- Germany
- USA
- Italy
- Japan
- UK
- France
- Germany
- Zambia
- USA
- Spain
- Mozambique
- UK
- Zimbabwe

Imports total value (including others) | 5 215.88
Exports total value (including others) | 5 807.48
Imports total value (including others) | 1 023.07
Exports total value (including others) | 640.50
Imports total value (including others) | 3 153.92
Exports total value (including others) | 598.39
Imports total value (including others) | 377.83
Exports total value (including others) | 13 058.18
Electrical machinery and apparatus

Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

- Production: -0.3%
- Capacity utilisation: 1.8% (Percentage points)
- Employment (y/y): 1.4%
- Exports (R): -4.4%
- Imports (R): -5.7%

Production trends

Employment trends

Trade trends

Major traded products

Export performance

Top trading partners

Production weight: 2.5

Production index

Capacity utilisation (%)

Volume of production

Production capacity

Number (1,000)

Exports total value (including others)

Imports total value (including others)

Exports and Imports

R billion per quarter (current values)

Exports

Imports

Production Capacity utilisation (%)

HS4 Code : Sector description

Change in Rm

Exports

Imports

China
Germany
USA
Japan
France
UK
Italy
Mozambique
Zambia
Zimbabwe
Germany
DRC
Nigeria
USA

Top import destinations' share

Top export destinations' share

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

HS4 Code : Sector description

Change in Rm

H8504: Elec transformers, static converters & rectifiers
119.16

H8501: Electric motors and generators
76.88

H8547: Insulating fittings for electrical equipment
57.96

H8537: Electrical power, etc, control & distribution boards
23.57

H8536: Electrical switches, connectors, etc, for < 1kV
16.99

H8505: Electro & equipment using magnets
14.10

H8405: Lamps and light fittings, illuminated signs, etc
13.77

H8539: Electric filament, discharge lamps
5.08

H8503: Parts for electric motors and generators
4.06

H8502: Electric generating sets and rotary converters
2.47

Top trading partners

(2009: Semester 1)

HS4 Code : Sector description

Rm

H8504: Elec transformers, static converters & rectifiers
2 293.04

H8502: Electric generating sets and rotary converters
1 708.76

H8536: Electrical switches, connectors, etc, for < 1kV
1 232.82

H8501: Electric motors and generators
1 050.93

H8544: Insulated wire and cable, optical fibre cable
889.15

Imports

Exports

Imports total value (including others)
12 272.15

Exports total value (including others)
2 641.97

Major traded products

2009: Semester 1

H8504: Elec transformers, static converters & rectifiers
H8502: Electric generating sets and rotary converters
H8536: Electrical switches, connectors, etc, for < 1kV
H8501: Electric motors and generators
H8544: Insulated wire and cable, optical fibre cable

Imports

Exports

Imports total value (including others)
434.65

Exports total value (including others)
379.86

Major traded products

2009: Semester 1

H8504: Elec transformers, static converters & rectifiers
H8502: Electric generating sets and rotary converters
H8536: Electrical switches, connectors, etc, for < 1kV
H8501: Electric motors and generators
H8537: Electrical power, etc, control & distribution boards

Imports

Exports

Imports total value (including others)
276.59

Exports total value (including others)
265.27

Major traded products

2009: Semester 1

H8504: Elec transformers, static converters & rectifiers
H8502: Electric generating sets and rotary converters
H8536: Electrical switches, connectors, etc, for < 1kV
H8501: Electric motors and generators
H8544: Insulated wire and cable, optical fibre cable

Imports

Exports

Imports total value (including others)
889.15

Exports total value (including others)
889.15

Major traded products

2009: Semester 1

H8504: Elec transformers, static converters & rectifiers
H8502: Electric generating sets and rotary converters
H8536: Electrical switches, connectors, etc, for < 1kV
H8501: Electric motors and generators
H8544: Insulated wire and cable, optical fibre cable

Imports

Exports

Imports total value (including others)
2 293.04

Exports total value (including others)
2 293.04

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

HS4 Code : Sector description

Change in Rm

H8504: Elec transformers, static converters & rectifiers
119.16

H8501: Electric motors and generators
76.88

H8547: Insulating fittings for electrical equipment
57.96

H8537: Electrical power, etc, control & distribution boards
23.57

H8536: Electrical switches, connectors, etc, for < 1kV
16.99

H8505: Electro & equipment using magnets
14.10

H8405: Lamps and light fittings, illuminated signs, etc
13.77

H8539: Electric filament, discharge lamps
5.08

H8503: Parts for electric motors and generators
4.06

H8502: Electric generating sets and rotary converters
2.47

Top trading partners

(2009: Semester 1)

China
Germany
USA
Japan
France
UK
Italy
Mozambique
Zambia
Zimbabwe
Germany
DRC
Nigeria
USA

Top import destinations' share

Top export destinations' share

Export performance

(2009: Semester 1 compared to 2008: Semester 1)

HS4 Code : Sector description

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H8504: Elec transformers, static converters & rectifiers
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13.77

H8539: Electric filament, discharge lamps
5.08

H8503: Parts for electric motors and generators
4.06

H8502: Electric generating sets and rotary converters
2.47
Production weight: 0.4

**TV, radio and communication equipment**

### Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

- **Production** down -7.6% (-0.5 percentage points)
- **Capacity utilisation** down -6.8%
- **Employment (y/y)** down -8.4%
- **Exports (R)** down -7.7%
- **Imports (R)**

### Production trends

- **Production index**: 2002 to 2009
- **Capacity utilisation (%)**: 60 to 95

### Employment trends

- **Number (1,000)**: 1999 to 2008
- **Employment (y/y)**

### Trade trends

- **R billion per quarter (current values)**:
  - **Exports**
  - **Imports**

### Export performance

- **(2009: Semester 1 compared to 2008: Semester 1)**
  - **Change in Rm**
    - H8525: Radio and TV transmitters, television cameras: 117.82
    - H8527: Radio, radio-telephony receivers: 45.20
    - H8518: Audio-electronic equipment non-recording devices: 8.63
    - H8532: Electrical capacitors, fixed, variable or adjustable: 2.57
    - H8519: Non-recording sound reproducing equipment: 2.24
    - H8534: Electronic printed circuits: 2.22
    - H8533: Electrical resistors & rheostats except for heating: 1.39
    - H8540: Thermionic and cold cathode valves and tubes: 1.17
    - H8520: Electronic sound recording equipment: 0.00
    - H8522: Accessories of audio, video recording equipment: -1.64

### Major traded products

- **2009: Semester 1**
  - **Imports total value (including others)**: 12 063.65
    - H8541: Diodes, transistors, semi-conductors, etc: 1 129.43
    - H8529: Parts for radio, TV transmission equipment: 706.69
    - H8521: Diodes, transistors, semi-conductors, etc: 654.49
  - **Exports total value (including others)**: 1 575.44
    - H8528: Television receivers, video monitors, projectors: 289.43
    - H8517: Electric apparatus for line telephony, telegraphy: 250.69
    - H8529: Parts for radio, TV transmission equipment: 191.27
    - H8528: Television receivers, video monitors, projectors: 184.79

### Top trading partners

- **2009: Semester 1**
  - **Top import destinations’ share**
  - **Top export destinations’ share**

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**Page | 42**
**Professional and scientific equipment**

**Trend analysis: Semester 1, 2009 compared to Semester 1, 2008**

-6.6%  
Production

0.7%  
Employment (y/y)

-7.7%  
Exports (R)

-20.8%  
Imports (R)

**Production trends**

**Employment trends**

**Trade trends**

**Major traded products**

2009: Semester 1

**Export performance**

(2009: Semester 1 compared to 2008: Semester 1)

**Top trading partners**

2009: Semester 1

USA
Germany
China
Japan
Switzerland
France
UK
Sweden

[Graphs and data tables showing production, employment, trade, and major traded products, as well as top trading partners]
**Motor vehicles, parts and accessories**

### Trend analysis: Semester 1, 2009 compared to Semester 1, 2008

- **Production**: -40.0% (-15.6% (percentage points))
- **Capacity utilisation**: -0.8%
- **Employment (y/y)**: -29.7%
- **Exports (R)**: -36.5%

### Production trends

- **Production index**
- **Capacity utilisation (%)**

### Employment trends

- **Number (1,000)**

### Trade trends

- **R billion per quarter (current values)**

### Export performance

- **(2009: Semester 1 compared to 2008: Semester 1)**
- **Change in Rm**

### Major traded products

- **2009: Semester 1**
- **Imports total value (including others)**: 32 499.16
- **Exports total value (including others)**: 20 557.89

### Top trading partners

- **2009: Semester 1**
- **Top import destinations’ share**
- **Top export destinations’ share**
### Production trends

- **Volume of production**
- **Production capacity**

### Employment trends

- Number (1,000)

### Trade trends

- **Exports**
- **Imports**

### Major traded products

- **2009: Semester 1**

### Export performance

- **2009: Semester 1 compared to 2008: Semester 1**

### Top trading partners

- **2009: Semester 1**
### Production Weight

**Furniture**

### Trend Analysis: Semester 1, 2009 Compared to Semester 1, 2008

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production</td>
<td>1999</td>
<td>2000</td>
</tr>
<tr>
<td>Employment (y/y)</td>
<td>76</td>
<td>81</td>
</tr>
<tr>
<td>Production Capacity</td>
<td>77</td>
<td>82</td>
</tr>
<tr>
<td>Capacity Utilisation</td>
<td>91</td>
<td>96</td>
</tr>
</tbody>
</table>

-14.1% Production

### Production Trends

- **Volume of Production**
- **Production Capacity**

### Employment Trends

- Employment (1,000)

### Trade Trends

- **Exports**
- **Imports**

R billion per quarter (current values)

### Major Traded Products

**2009: Semester 1**

<table>
<thead>
<tr>
<th>HS4 Code : Sector description</th>
<th>Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H9401: Seats (except dentist, barber, etc chairs)</td>
<td>794.56</td>
</tr>
<tr>
<td>H9403: Other furniture and parts thereof</td>
<td>565.70</td>
</tr>
<tr>
<td>H9404: Mattress supports, mattresses, bedding</td>
<td>7.41</td>
</tr>
</tbody>
</table>

Imports (Rm)

- Imports total value (including others) | 1 367.67 |

Exports (Rm)

- Exports total value (including others) | 1 470.23 |

### Export Performance

**2009: Semester 1 compared to 2008: Semester 1**

<table>
<thead>
<tr>
<th>HS4 Code : Sector description</th>
<th>Change in Rm</th>
</tr>
</thead>
<tbody>
<tr>
<td>H9403: Other furniture and parts thereof</td>
<td>36.93</td>
</tr>
<tr>
<td>H9404: Mattress supports, mattresses, bedding</td>
<td>-3.56</td>
</tr>
<tr>
<td>H9401: Seats (except dentist, barber, etc chairs)</td>
<td>-682.97</td>
</tr>
</tbody>
</table>

### Top Trading Partners

**2009: Semester 1**

- Top import destinations' share
- Top export destinations' share
Production trends

Employment trends

Trade trends

Export performance

Major traded products

Top trading partners
Acronyms and data sources

**Acronyms:**

**BRICs**  
Brazil, Russia, India and China

**EU (25)**  
European Union member states are: Austria, Belgium, Cyprus, Czech Republic, Germany, Denmark, Estonia, Spain, Finland, France, United Kingdom, Greece, Hungary, Ireland, Italy, Lithuania, Luxembourg, Latvia, Malta, The Netherlands, Poland, Portugal, Sweden, Slovenia and Slovakia.

**GDP**  
Gross domestic product.

**HS Codes**  
Harmonized System codes.

**LDC**  
Least developed country.

**MERCOSUR/L**  
Mercado Común del Sur (in Spanish) or Mercado Comum do Sul (in Portuguese) members are: Argentina, Brazil, Paraguay and Uruguay.

**NAFTA**  
North American Free Trade Agreement members are: Canada, Mexico and the United States of America.

**nes**  
Not elsewhere specified.

**SA**  
Republic of South Africa.

**SACU**  
Southern African Customs Union members are: Botswana, Lesotho, Namibia, South Africa and Swaziland.

**SADC**  
Southern African Development Community members are: Angola, Botswana, Democratic Republic of Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, United Republic of Tanzania, Zambia and Zimbabwe.

**USA / US**  
United States of America.

**UK**  
United Kingdom

**y/y**  
Year-on-year growth rate

**q/q**  
Quarter-on-quarter growth rate.

**Data sources:**

**South African Revenue Services**  
South African trade data.

**International Trade Centre (ITC)**  
Trade data on BRICs and Africa.

**Quantec Research**  
South African employment data.

**StatsSA**  
South African production and capacity utilization data.