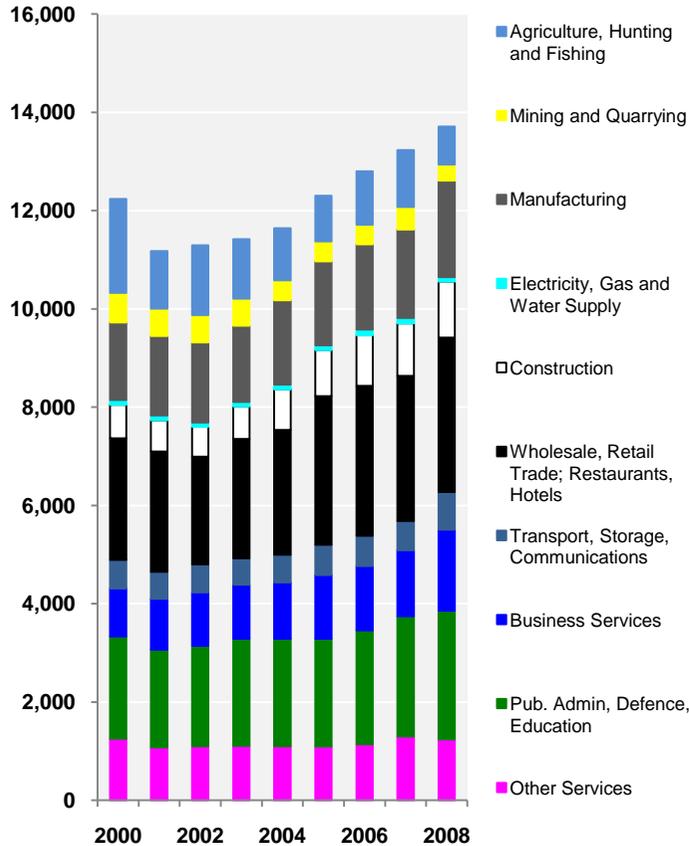
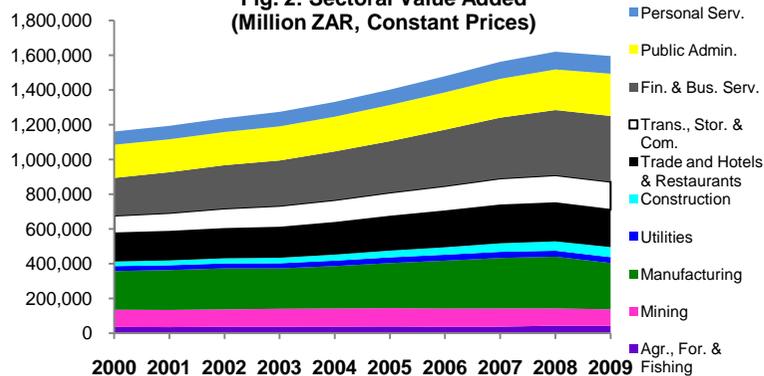


Fig. 1: Employment by Major Economic Activity ('000s), 2000-2008



Source: ILO Laborsta; Persons aged 15 years and over. 2004: Break. Methodology revised; data not strictly comparable.

Fig. 2: Sectoral Value Added (Million ZAR, Constant Prices)



Source: Statistics South Africa.

Wholesale & Retail Trade and Hotels & Restaurants

Wholesale and retail trade (also referred to as commerce), including hotels and restaurants, employed a total of 3.1 million people in 2008 (see Figs.1 & 3), making it the largest total employment sector in South Africa. Among those working in the sector approximately 2,127,000 are working in the formal sector and 716,000 are working independently. From June 2008 to June 2009, the rate of employment in the sector decreased by 3.6 per cent, accompanied by a drop in gross earnings. The sector contributed more than 13.5 per cent in value added GDP in 2008, though the annual growth rate has slowed in recent years, reaching just 5.2 per cent in 2008 (see Fig. 2).

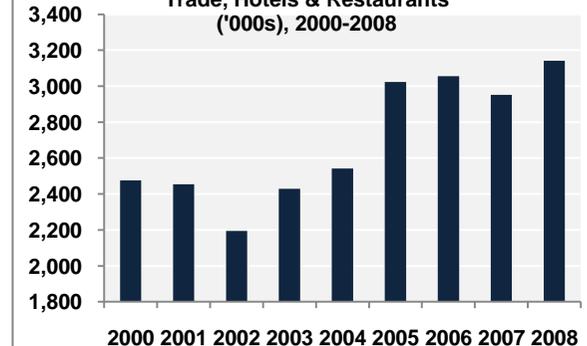
The retail trade industry represents the largest share of employment within the broader sector and the three largest types of retail traders in South Africa include non-specialized food, beverage & tobacco stores; textiles, clothing, footwear & leather stores; and specialized food, beverage & tobacco outlets. According to establishment survey data, employees in registered retail trade establishments numbered nearly 600,000 in 2009. Similarly, establishment survey data for wholesale trade counted nearly 450,000 employees in registered enterprises in 2009 with the largest shares of wholesale traders operating in the machinery & equipment and food, beverage & tobacco subsectors. Within the trade industry, employment levels are concentrated in large enterprises, however small enterprises do comprise a significant number of wholesale and retail outlets in the country. Micro-enterprises also contribute importantly to employment levels and sales in wholesale and retail trade, particularly in the re-sale of second hand goods. Females comprised 50.3 per cent of employees in the retail trade industry; however, within wholesale trade, employment is 66 per cent male, with females working predominately in the wholesale trade of clothing, apparel and footwear. Within the hotels and accommodation subsector, micro-enterprises provided employment to half of the nearly 90,000 persons employed in registered enterprises in 2009. Large enterprises also contributed significantly to employment levels with 42 per cent of accommodation workers employed in large establishments. The proportion of female workers in the sub-industry was 61 per cent in 2009.

The majority of profits in the trade industry in South Africa came from the sales of food beverages and tobacco; textiles, apparel & leather goods; and household furniture, appliances & equipment. In terms of merchandise trade (much of it through wholesale merchant exporters and importers) international exports reached 80.7 billion USD, while imports to South Africa reached 99.5 billion USD in 2008. Manufactures represented 54.5 per cent of total exports in 2008, while fuels & mining products, and agricultural products contributed 35.4 and 8.7 per cent, respectively to export trade. South Africa's major export partners include the European Union, Japan, the United States, China and India.

The South African labour market is typified by a surplus of unskilled workers and a shortage of skilled workers, and the wholesale and retail trade sector, along with the hotels and restaurants sector, attracts a number of low- or unskilled workers who are often required to work part-time or on a casual basis. This often requires long hours with low pay and limited entitlement to benefits. After agriculture and domestic services, this sector has the third lowest level of salaries and wages, and employees are particularly vulnerable to precarious work and contracts.

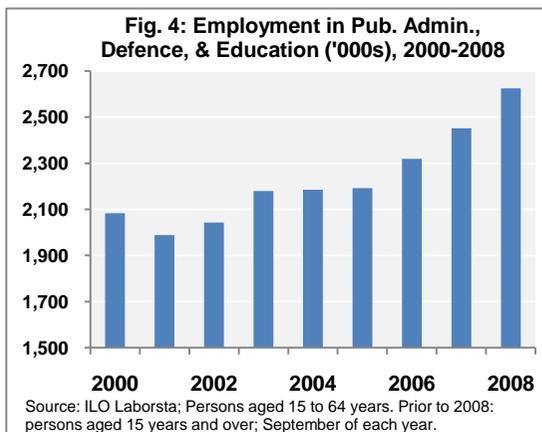
In terms of earnings in the sector, workers in wholesale & retail trade and hotels & restaurants earned an average of 6,415 ZAR per month in 2008, much less than the 9,235 ZAR earned on average per month by workers across the total economy.

Fig. 3: Employment in Wholesale & Retail Trade, Hotels & Restaurants ('000s), 2000-2008



Source: ILO Laborsta; Persons aged 15 to 64 years. Prior to 2008: persons aged 15 years and over; September of each year.

Public Administration, Defence & Education



More than 2.5 million people were employed in South Africa in 2008 in public administration, defence and education, which together represented the second largest employment sector in the country (see Figs. 1 & 4). Public administration contributed 14.4 per cent of GDP in 2008, down from 16.5 per cent in 2000 (see Fig. 2). Central government services also contributed 12.5 per cent to GDP in 2008 (see Fig. 2). According to the National Treasury, government expenditure on education has

grown yearly by 11 per cent on average between 2006 and 2009, by 5.8 per cent on defence and intelligence and by 11 per cent on general administration costs. The government's 2009 Programme of Action establishes improved education as a priority for the next five years, with efforts being made to ensure access to well managed schools with more qualified teachers across the entire school system. In 2009 there were 12 million students taught by 386,587 teachers in 24,693 public schools, and 386,098 students enrolled in 1,174 private schools taught by an additional 24,557 teachers.

South Africa's Expanded Public Works Programme (EPWP) was launched in April 2004 to promote economic growth and create opportunities for sustainable development through additional work opportunities and training programmes, particularly for low-skilled workers. A key focus of the EPWP has been the provision of public social services. The first five years of the Programme have resulted in the creation of 1.4 million jobs in South Africa. The second phase of the EPWP, launched in 2009, will create an estimated two million full-time jobs for the poor and the unemployed, with a particular focus on generating opportunities for youth, women and those job seekers with disabilities.

Social dialogue regarding labour market policy and social and economic policy in South Africa generally takes place at the National Economic Development and Labour Council (NEDLAC). Freedom of association is guaranteed by law, and all workers, except members of the National Intelligence Agency and the Secret Service, are allowed to join unions and are protected against unfair dismissal. The bargaining councils serve as the forum for collective bargaining for both public and private sectors in South Africa. Municipal government employees are not considered part of the public service, and therefore are not covered by the bargaining council for the public service.

The right to strike is recognized for all workers including those in the public sector. In August 2010 more than a million civil servants took part in a national strike, including teachers and hospital staff who went on strike for three weeks, in order to put pressure on the government to meet their demand for wage increase.

In terms of earnings, workers in the sector earned 10,903 ZAR per month on average in 2008, more than the 9,235 ZAR per month earned on average by workers across all economic sectors in South Africa.

Key Labour Market Indicators (2009)

Economically Active Population:

Total: 17,382,500

Men: 9,399,750

Women: 7,982,500

Labour Force Participation Rate:

Total: 55.8%

Men: 63.3%

Women: 49.1%

Unemployment Rate:

Total: 24.0%

Men: 22.2%

Women: 26.1%



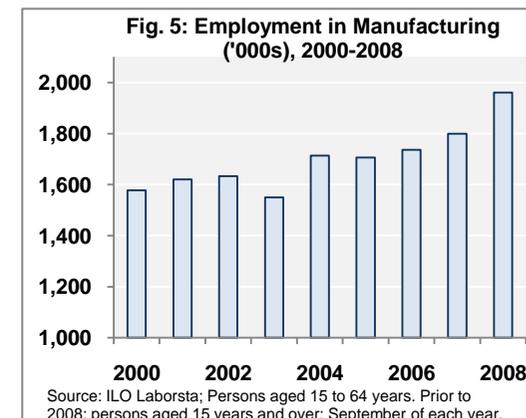
Manufacturing

The manufacturing industry is South Africa's third largest employer, with 1.96 million workers employed in 2008, up from 1.57 million in 2000 (see Figs. 1 & 5). The manufacturing industry has grown at an average annual rate of 3 per cent from 2000 to 2008, compared to the total economy which grew at just 1.5 per cent over the same period. In terms of value added, manufacturing contributed 18.4 per cent to GDP in 2008, a slight decline from the 19.2 per cent share in 2000 (see Fig. 2).

The largest subsectors in terms of employment include the manufacturing of basic metals, metal products, machinery & equipment; the manufacturing of food products & beverages; and textiles, clothing, leather & footwear manufacturing. According to establishment survey data, 319,685 people were employed in the manufacture of basic metals, metal products & equipment; 194,828 people were employed in food products and beverage manufacturing; and 169,842 people were employed in textiles, clothing, leather & footwear manufacturing in 2008. Overall females comprised just 32 per cent of the total manufacturing labour force, though the share of female employees ranged from less than 17 per cent in the basic metals, metal products, machinery & equipment subsector to more than 67 per cent in textiles, clothing, leather & footwear manufacturing.

South Africa's manufactured goods comprised more than half of its exports in 2008, with major products including carbon steel, stainless steel and aluminium, wearing apparel, knit, woven and specialty fabrics, as well as processed meats, fruits and fruit juices. The metals industry also supports the production of machine parts many of which provide inputs for the country's growing automotive sector.

Within the manufacturing industry, small, medium and micro enterprises employ more than 43 per cent of all workers. While large companies, do continue to contribute the largest share of employment and revenue, the contribution of small, medium and micro enterprises to employment is increasingly important in the industry. In terms of earnings, workers in the manufacturing sector earned 8,240 ZAR per month on average in 2008, compared to 9,235 ZAR per month for workers across the total economy.



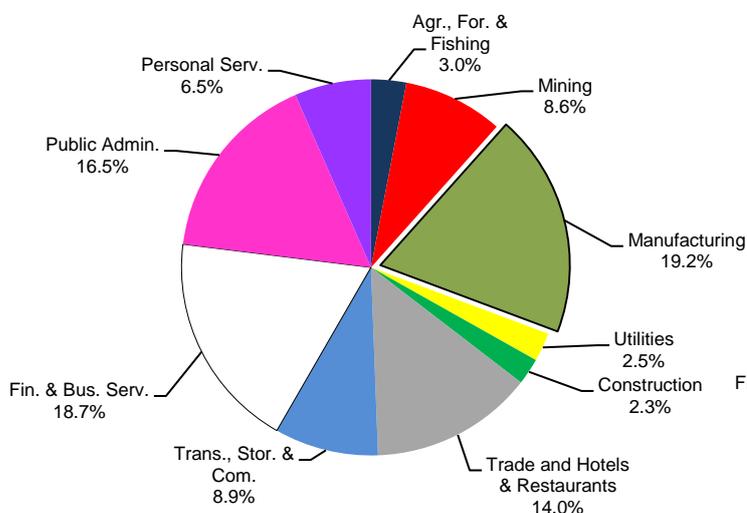
South Africa

Table 1: GDP Value Added by Industry (Million ZAR, Constant Prices) & % Share in Total Value Added

	2000	2001	2002	2003	2004	2005	2006	2007	2008
Total GDP	1,157,441.0	1,191,007.0	1,236,270.0	1,273,129.0	1,330,390.0	1,401,067.0	1,478,492.0	1,561,410.0	1,619,175.0
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Agr., For. & Fishing	34,787.0	33,639.0	35,826.0	36,070.0	36,380.0	37,402.0	35,359.0	36,301.0	42,154.0
	3.0%	2.8%	2.9%	2.8%	2.7%	2.7%	2.4%	2.3%	2.6%
Mining	99,069.0	98,970.0	99,960.0	103,355.0	104,915.0	105,992.0	105,364.0	105,336.0	99,398.0
	8.6%	8.3%	8.1%	8.1%	7.9%	7.6%	7.1%	6.7%	6.1%
Manufacturing	222,579.0	229,701.0	236,133.0	232,581.0	243,965.0	259,101.0	275,782.0	290,246.0	297,900.0
	19.2%	19.3%	19.1%	18.3%	18.3%	18.5%	18.7%	18.6%	18.4%
Utilities	28,597.0	27,539.0	28,503.0	29,344.0	31,335.0	33,010.0	34,139.0	35,294.0	34,198.0
	2.5%	2.3%	2.3%	2.3%	2.4%	2.4%	2.3%	2.3%	2.1%
Construction	26,410.0	27,711.0	29,321.0	31,575.0	34,451.0	38,558.0	42,582.0	48,971.0	53,644.0
	2.3%	2.3%	2.4%	2.5%	2.6%	2.8%	2.9%	3.1%	3.3%
Trade and Hotels & Restaurants	161,503.0	164,572.0	168,357.0	172,845.0	182,175.0	195,012.0	206,636.0	217,607.0	219,359.0
	14.0%	13.8%	13.6%	13.6%	13.7%	13.9%	14.0%	13.9%	13.5%
Trans., Stor. & Com.	102,874.0	108,944.0	118,749.0	126,287.0	132,459.0	139,472.0	146,607.0	156,289.0	161,672.0
	8.9%	9.1%	9.6%	9.9%	10.0%	10.0%	9.9%	10.0%	10.0%
Fin. & Bus. Serv.	216,747.0	234,450.0	249,165.0	261,123.0	279,544.0	295,504.0	324,002.0	349,501.0	375,090.0
	18.7%	19.7%	20.2%	20.5%	21.0%	21.1%	21.9%	22.4%	23.2%
Public Admin.	191,340.0	189,552.0	190,910.0	196,193.0	199,947.0	208,561.0	214,947.0	223,618.0	233,653.0
	16.5%	15.9%	15.4%	15.4%	15.0%	14.9%	14.5%	14.3%	14.4%
Personal Serv.	75,735.0	77,438.0	79,346.0	83,756.0	85,219.0	88,455.0	93,073.0	98,247.0	102,107.0
	6.5%	6.5%	6.4%	6.6%	6.4%	6.3%	6.3%	6.3%	6.3%

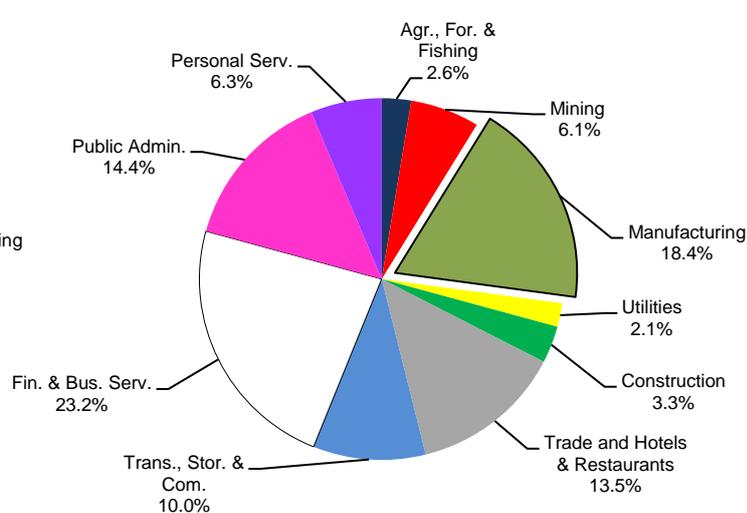
Source: Statistics South Africa.

Share in Sectoral Value Added, 2000



Source: Statistics South Africa.

Share in Sectoral Value Added, 2008



Source: Statistics South Africa.

Table 2: World Merchandise Exports (Thousand USD, Current Prices)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total All Products	26,297,951.9	25,997,548.6	23,064,373.2	31,635,839.0	40,263,523.1	46,991,046.5	52,601,759.8	64,026,608.4	73,965,546.0	53,863,891.9
All Food Items	2,232,007.6	2,344,651.7	2,456,850.7	3,126,684.8	3,510,694.7	3,990,370.9	3,734,146.0	4,213,903.3	5,428,720.0	5,466,599.1
Food	1,800,355.2	1,869,021.4	1,974,795.3	2,456,623.7	2,722,953.1	3,138,229.3	2,928,918.5	3,246,117.3	4,350,614.5	4,333,659.2
Beverages & Tobacco	431,652.4	475,630.3	482,055.4	670,061.1	787,741.6	852,141.7	805,227.5	967,786.0	1,078,105.5	1,132,939.9
Agricultural Raw Materials	1,038,435.4	854,963.2	897,122.7	1,111,077.2	1,151,226.8	1,255,238.4	1,220,818.1	1,359,788.3	1,607,842.6	1,212,221.1
Ores, Metals, Precious Stones & Non-Monetary Gold	4,579,253.6	7,520,686.1	4,174,375.0	7,969,078.4	11,185,891.7	13,378,380.1	17,601,632.4	21,690,232.7	24,004,481.8	17,246,301.1
Ores & Metals	2,799,590.1	5,935,758.5	2,598,523.7	6,019,593.9	8,852,042.4	10,461,609.4	14,975,015.8	18,782,137.9	21,480,618.2	15,738,958.4
Fuels	2,664,190.6	3,047,820.6	2,853,167.2	3,105,805.1	3,664,159.4	4,866,212.8	4,997,176.9	6,759,014.9	7,120,311.6	6,022,680.3
Coal, Coke, & Briquettes	1,326,368.0	1,770,064.8	1,839,110.6	1,804,841.7	2,436,025.2	3,273,054.2	3,139,154.0	3,386,407.2	4,785,502.6	4,215,108.8
Petroleum, Petroleum Products & Related Materials	1,321,709.5	1,262,722.3	1,005,455.8	1,290,758.2	1,219,123.6	1,581,028.4	1,827,875.6	3,225,979.7	2,198,697.0	1,675,470.7
Gas, Natural & Manufactured	16,110.5	14,937.7	8,522.6	10,044.3	9,009.5	12,129.2	30,143.9	17,722.0	21,932.8	19,184.5
Electric Current	2.6	95.8	78.2	161.0	1.2	0.9	3.4	128,906.0	114,179.2	112,916.2
Manufactured Goods	12,246,316.2	12,152,557.8	12,677,095.9	16,309,268.0	20,734,407.7	23,488,880.4	24,882,721.3	29,935,261.1	35,759,068.1	23,909,179.3
Chemicals	2,054,657.2	2,021,458.6	2,154,313.0	2,395,903.4	3,157,394.4	3,955,149.0	3,909,928.1	4,340,227.0	5,723,719.8	4,100,199.1
Machinery & Transport Equipment	4,569,980.9	5,226,498.6	5,260,405.9	6,544,142.7	7,938,609.9	9,574,435.4	11,293,341.8	13,411,646.1	16,229,148.6	10,786,593.1
Iron & Steel	2,757,975.5	2,176,224.7	2,411,353.8	3,868,268.6	5,650,033.6	5,864,078.9	5,647,878.6	7,460,143.3	8,859,678.1	5,116,155.9
Textile Fibres, Yarn, Fabrics & Clothing	645,424.7	645,594.5	694,194.9	822,377.2	760,583.5	699,461.8	663,869.5	727,187.6	680,782.3	590,177.9
Other Manufactured Goods	5,621,678.1	4,904,600.7	5,262,377.0	7,369,221.8	9,638,403.3	9,959,296.0	9,679,451.4	12,183,388.0	13,806,199.7	9,022,387.1

Source: UNCTADStat. Data presented according to SITC Rev.3 and standard UNCTAD product groupings.

Table 3: World Merchandise Imports (Thousand USD, Current Prices)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total All Products	26,770,731.4	25,595,222.8	26,212,020.2	34,543,063.0	47,603,274.1	55,032,638.7	68,469,125.1	79,872,587.2	87,593,067.6	63,766,058.0
All Food Items	1,254,434.8	1,114,569.7	1,307,428.0	1,716,415.2	2,362,417.8	2,450,927.7	2,976,617.4	4,128,454.0	4,588,642.9	4,163,326.1
Food	1,107,478.9	963,477.0	1,147,655.0	1,491,230.4	2,043,831.8	2,123,946.2	2,584,918.4	3,595,517.2	4,029,327.7	3,495,782.1
Beverages & Tobacco	146,955.9	151,092.6	159,773.0	225,184.8	318,586.1	326,981.4	391,699.0	532,936.9	559,315.2	667,544.0
Agricultural Raw Materials	395,856.1	346,645.8	385,548.1	482,218.8	605,648.7	596,760.9	672,616.3	759,832.3	775,197.4	567,152.1
Ores, Metals, Precious Stones & Non-Monetary Gold	1,178,382.9	978,930.7	1,140,717.3	1,575,612.0	2,046,263.3	2,360,068.2	3,132,303.0	3,684,412.0	3,819,827.3	1,635,030.1
Ores & Metals	710,272.6	543,687.9	667,085.7	937,669.6	1,335,532.1	1,408,809.6	2,185,628.4	2,632,018.5	2,937,493.4	1,187,219.3
Fuels	3,825,725.5	3,769,152.5	3,269,184.9	4,105,260.8	6,858,268.1	7,846,149.1	12,546,998.3	14,847,257.0	19,555,041.5	13,663,311.0
Coal, Coke, & Briquettes	90,166.2	188,414.8	119,581.2	170,425.1	236,755.8	225,158.5	283,948.4	285,391.9	690,777.6	365,924.0
Petroleum, Petroleum Products & Related Materials	3,734,009.0	3,570,159.7	3,134,742.7	3,934,525.1	6,620,993.3	7,620,196.5	12,242,068.8	14,317,574.5	18,512,752.7	12,949,005.5
Gas, Natural & Manufactured	652.8	316.6	515.8	310.6	519.0	794.1	20,981.2	138,640.9	196,038.9	139,697.0
Electric Current	897.5	10,261.4	14,345.3	:	0.0	:	:	105,649.7	155,472.4	208,684.5
Manufactured Goods	17,799,623.2	17,230,201.9	17,757,670.0	23,421,298.8	31,672,423.6	36,978,649.7	43,862,414.7	50,631,893.9	53,021,741.5	40,224,373.9
Chemicals	3,131,803.6	2,952,781.2	3,181,327.4	3,813,919.2	4,752,213.7	5,516,706.2	6,104,893.3	7,163,896.8	8,549,922.8	6,673,793.3
Machinery & Transport Equipment	9,839,319.1	9,800,440.3	9,839,798.6	13,594,997.2	18,829,874.3	21,672,146.1	25,890,299.5	29,795,178.5	30,670,036.9	22,201,293.6
Iron & Steel	323,569.8	316,201.6	337,079.5	451,962.6	655,604.1	828,438.3	1,130,889.0	1,572,557.5	1,549,018.1	1,029,628.2
Textile Fibres, Yarn, Fabrics & Clothing	901,727.0	818,011.9	877,618.5	1,147,749.3	1,643,329.1	1,864,117.7	2,233,662.7	2,176,511.0	2,165,394.2	2,091,149.0
Other Manufactured Goods	4,828,500.5	4,476,980.5	4,736,544.0	6,012,382.4	8,090,335.6	9,789,797.4	11,867,221.8	13,672,818.6	13,801,781.9	11,349,287.0

Source: UNCTADStat. Data presented according to SITC Rev.3 and standard UNCTAD product groupings.

Table 4: Total Employment by Major Economic Activity (thousands) & % Share in Total Employment

	2000	2001	2002	2003	2004	2005	2006	2007	2008
Total Employment	12,238.0	11,181.0	11,296.0	11,424.0	11,643.0	12,301.0	12,800.0	13,234.0	13,713.0
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Agriculture, Hunting, Forestry & Fishing	1,914.0	1,178.0	1,420.0	1,212.0	1,063.0	925.0	1,088.0	1,164.0	776.0
	15.6%	10.5%	12.6%	10.6%	9.1%	7.5%	8.5%	8.8%	5.7%
Mining & Quarrying	603.0	554.0	559.0	552.0	405.0	411.0	398.0	455.0	328.0
	4.9%	5.0%	4.9%	4.8%	3.5%	3.3%	3.1%	3.4%	2.4%
Manufacturing	1,578.0	1,620.0	1,633.0	1,550.0	1,714.0	1,706.0	1,737.0	1,799.0	1,961.0
	12.9%	14.5%	14.5%	13.6%	14.7%	13.9%	13.6%	13.6%	14.3%
Electricity, Gas & Water Supply	94.0	94.0	84.0	91.0	99.0	100.0	119.0	116.0	94.0
	0.8%	0.8%	0.7%	0.8%	0.9%	0.8%	0.9%	0.9%	0.7%
Construction	683.0	634.0	605.0	664.0	824.0	935.0	1,024.0	1,066.0	1,141.0
	5.6%	5.7%	5.4%	5.8%	7.1%	7.6%	8.0%	8.1%	8.3%
Wholesale & Retail Trade; Hotels & Restaurants	2,476.0	2,454.0	2,194.0	2,429.0	2,542.0	3,024.0	3,055.0	2,952.0	3,141.0
	20.2%	21.9%	19.4%	21.3%	21.8%	24.6%	23.9%	22.3%	22.9%
Transport, Storage & Communications	582.0	546.0	574.0	537.0	563.0	616.0	611.0	596.0	767.0
	4.8%	4.9%	5.1%	4.7%	4.8%	5.0%	4.8%	4.5%	5.6%
Financial & Business Services	976.0	1,035.0	1,084.0	1,098.0	1,147.0	1,296.0	1,309.0	1,340.0	1,646.0
	8.0%	9.3%	9.6%	9.6%	9.9%	10.5%	10.2%	10.1%	12.0%
Pub. Admin, Defence & Education	2,084.0	1,989.0	2,043.0	2,180.0	2,185.0	2,192.0	2,319.0	2,452.0	2,624.0
	17.0%	17.8%	18.1%	19.1%	18.8%	17.8%	18.1%	18.5%	19.1%
Private Households	1,146.0	1,034.0	1,029.0	1,075.0	1,075.0	1,067.0	1,108.0	1,244.0	1,232.0
	9.4%	9.2%	9.1%	9.4%	9.2%	8.7%	8.7%	9.4%	9.0%
Not Classifiable by Economic Activity	103.0	42.0	72.0	34.0	26.0	29.0	33.0	51.0	3.0
	5.4%	3.6%	5.1%	2.8%	2.4%	3.1%	3.0%	4.4%	0.4%

Note: Persons aged 15 to 64 years. Prior to 2008: persons aged 15 years and over; September of each year.

Source: ILO Laborsta.

