

SOUTH AFRICAN TEXTILE & CLOTHING STATISTICS

2013 - 2017



Issued by Cotton SA

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OVERVIEW OF THE SOUTH AFRICAN TEXTILE INDUSTRY

Over the years Government announced various programmes for the local textile and clothing industries, like the Structural Adjustment Programme (SAP), the General Export Incentive Scheme (GEIS), and the Duty Credit Certificate Scheme (DCCS).

Furthermore, various trade blocs were created that affected the local textile and clothing industries, for example the bilateral trade agreements with neighbouring Zimbabwe and Malawi, the Southern African Development Community (SADC), the European Union (EU), and the USA Africa Growth and Opportunity Act (AGOA). In terms of AGOA the preferential treatment was never extended to yarns, fabrics and domestic textiles, but only to clothing.

At the beginning of 2002, the tariff structure on textiles and clothing was drastically affected with the removal of the alternate specific duties, which heralded the onset of illegal imports and undervalued imports, especially from the East.

A new interim programme called the "Textile and Clothing Industry Development Programme" (TCIDP) was announced during 2006. A new programme for South Africa, which is WTO compliant, and called the Production Incentive Programme, has then been developed. It consisted of two components (an Upgrade Grant and an Interest Subsidy for Working Capital) and should be administered by the IDC, to run until March 2017. The Production Programme was introduced during 2010, to be applicable until March 2017.

During 2008 *the dti* launched a new general incentive programme called the Enterprise Investment Programme (EIP), which included the Manufacturing Investment Programme (MIP), to be available until the end of 2014. During 2009 *the dti* also launched the Clothing and Textile Competitiveness Improvement Programme (CTCIP), to be applicable until 2014 and administered by the IDC.

Government had reviewed its Industrial Policy Action Plan (IPAP), and during June 2011 the Government introduced its Preferential Procurement Programme.

Between 2008 and 2010, being the height of the global economic crisis, a number of manufacturing entities closed, giving a clear indication that the local textile industry was contracting. The last couple of years we have also seen changes in the textile and clothing sectors as results of closures, amalgamations, change of ownership and change of names.

During November 2013, the Government approved a 5-year business plan and R200 million grant funding for the establishment of a National Cluster for the South African **cotton** textile and apparel sector. The main objective of this cluster initiative is to build, improve and grow the capacity in the

cotton industry value chain for sustainable textiles and apparel, and to supply the local and international customers with fully traceable and sustainable cotton products.

The local cotton industry has also adjusted and since 2014 subscribed to the Better Cotton Initiative (BCI), an international initiative that exists to make global cotton products better for the people who produce it, better for the environment it grows in and better for the sector's future. The main objective is to develop and produce better cotton as a sustainable mainstream commodity. BCI is based on the following principles: crop protection, water stewardship, soil health, biodiversity and land responsibility, fibre quality, decent work, and effective management systems.

The Nkomazi Cotton Development Project started in 2014. It is a small holder farming project, which has grown to 752 small-scale farmers structured into 22 co-operatives, and who is currently also BCI certified.

STATISTICAL INFORMATION

CONSUMER PRICE INDEX (CPI)

2012=100	TOTAL "All items"	CLOTHING	HOME TEXTILES
2012	100	100	100
2013	103.4	101.7	n/a
2014	109.8	107.1	98.6
2015	114.7	113.0	95.1
2016	122.0	119.0	94.2
2016=100			
2016	97.8	97.6	99.6
2017	103.0	101.1	97.8

Source: Stats SA

PRODUCTION PRICE INDEX (PPI)

2016=100 PPI for final manufactured goods	Total Manufacturing	Textiles	Clothing
2013	82.0	86.5	79.5
2014	88.1	90.7	85.8
2015	91.3	95.7	90.3
2016	97.8	99.6	97.5
2017	102.5	103.4	102.8

Source: Stats SA

INDEX OF PHYSICAL VOLUME OF PRODUCTION

2015=100	2013	2014	2015	2016	2017
Total Manufacturing	100.0	99.5	100	100.6	99.2
Spin, weave, finish	98.1	96.9	100	104.7	103.3
Other textiles	102.5	103.6	100	100.9	98.3
Knitting mills (fabrics & garments)	122.1	107.1	100	97.7	93.8
Clothing	100.0	100.8	100	95.3	85.5

Source: Stats SA (Seasonally adjusted)

VALUE OF SALES (EX-FACTORY)

R (Million)	2013	2014	2015	2016	2017
Total Manufacturing	1677477	1820517	1865263	2005684	2137631
Spin, weave, finish	5380	6342	6996	8198	8385
Other textiles	10454	11737	13968	14340	14313
Total Textiles	15834	18079	20964	22538	22698
Knitting mills (fabrics & garments)	1727	2048	2376	2396	2622
Wearing apparel	15447	16928	15334	17354	18295

Source: Stats SA (Actual values)

EMPLOYMENT

No of employees	2013	2014	2015	2016	2017
Average per annum	No	No	No	No	No
Total Manufacturing	1145512	1137487	1157625	1188374	1192901
Textiles	31765	29947	32715	31917	31349
- Spin, weave, finish	7813	7690	10960	8881	8890
- Other textiles	23952	22257	21755	23037	22460
Knitting mills (fabrics & garments)	4948	4750	4720	5386	6071
Clothing	42025	40841	40715	41226	36967

Source: Stats SA

SOUTH AFRICAN FIBRE CONSUMPTION (Mill level)

TONS	2013	2014	2015	2016	2017
Cotton	21582	21254	21284	17680	22603
Wool & mohair	9461	8852	6548	7368	6558
Jute, sisal, etc	4783	4587	5711	6626	6898
Polyester staple	45814	40504	39268	31156	29158
Polyester CF	22929	22352	22600	26966	25649
Nylon	10129	10249	10236	10188	10188
Acrylic	5878	5128	4461	6287	5342
Viscose	717	552	484	555	470
Polyprop/HDPE	22744	21653	19948	18357	17952
Other	10240	10304	8941	8440	5267
TOTAL	154274	145435	139481	133623	130085

** Preliminary/estimates*

COTTON LINT STATISTICS

SOUTH AFRICA	Production Tons'000	Imports Tons'000	Exports Tons'000	Local consumption Tons'000	SA price for lint c/kg
2012/13	12.1	14.6	10.8	19.0	1508
2013/14	5.3	19.6	3.4	22.4	1674
2014/15	8.8	18.1	6.6	20.8	1852
2015/16est	16.9	19.3	11.4	21.3	1903
2016/17est	10.1	16.0	9.0	20.5	2000
WORLD	Production Tons (mill)	Imports Tons (mill)	Exports Tons (mill)	Consumption Tons (mill)	Cotlook A price US c/lb
2011/12	27.8	9.8	9.9	22.8	100
2012/13	26.8	9.8	10.1	23.5	88
2013/14	26.2	9.0	9.0	23.7	91
2014/15	26.2	8.0	8.0	24.2	71
2015/16	23.1	8.1	8.5	24.5	70
2016/17est	25.7	8.2	8.5	25.4	83
2017/18est	25.4	9.1	9.1	26.5	

Source: Cotton SA

LOCAL PRODUCTION* OF FABRICS

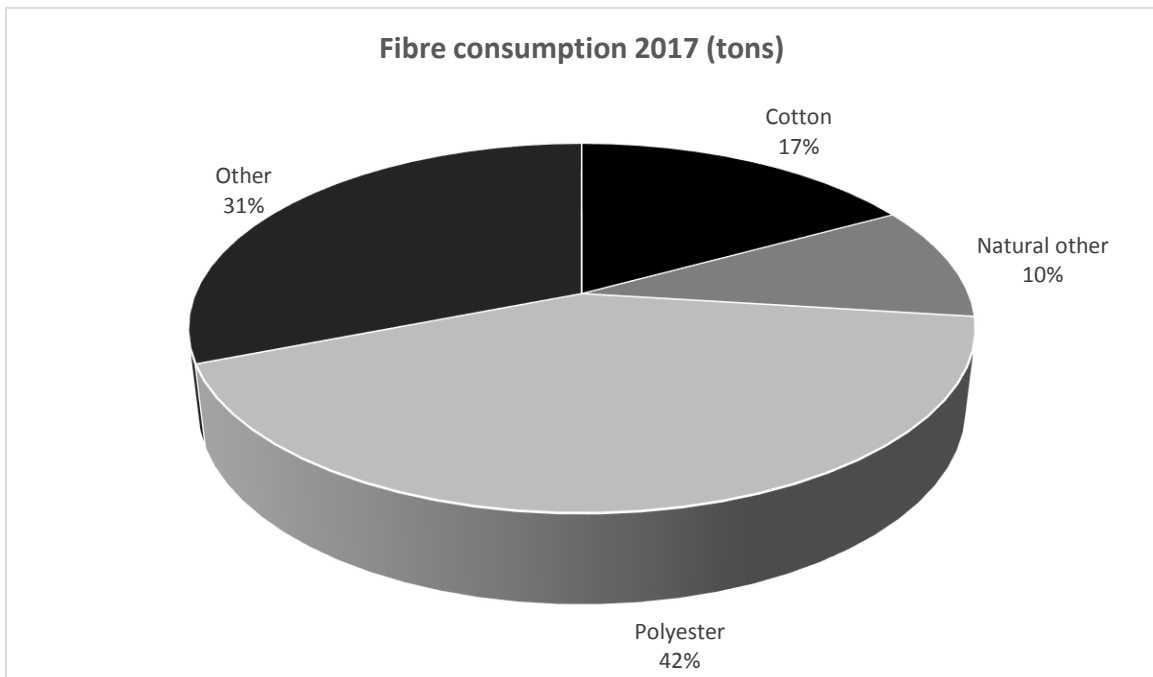
Million m2	2013	2014	2015	2016	2017
Cotton	76	75	78	102	101
Spun synthetics	78	77	79	107	106
Continuous filament	25	25	25	35	35
Worsted	3	3	4	5	5
<i>WOVENS – TOTAL</i>	<i>182</i>	<i>180</i>	<i>186</i>	<i>249</i>	<i>247</i>
Knitted fabrics	70	72	62	42	40
<i>FABRICS -TOTAL</i>	<i>252</i>	<i>252</i>	<i>248</i>	<i>291</i>	<i>287</i>

**Estimates*

SPUN YARN PRODUCTION*

Tons ('000)	2013	2014	2015	2016	2017
Cotton	36	37	28	54	53

**Estimates*



COTTON & COTTON TEXTILE ARTICLE IMPORTS (incl BLNS)

<i>Quantity / Volume</i>	2014	2015	2016	2017
Fibres (tons)	31519	21822	18581	22498
Yarns (tons)	8413	7784	8395	9460
Woven fabrics (tons)	16903	17519	15958	18662
Knitted fabrics (tons)	2886	3122	3338	6576
Home textiles (tons)	8376	9327	8163	8912
Garments (mill units)	240.2	244.8	233.2	225.3
Garments (tons)	5404	5489	5230	6060

Source: SARS (Customs)

UTILISATION OF PRODUCTION CAPACITY (%)

Percentage	2013	2014	2015	2016	2017
Total					
Manufacturing	81.5	81.2	80.6	81.9	81.4
Textiles	71.6	70.0	70.4	68.5	65.7
Clothing	81.2	79.3	79.2	77.5	75.7

Source: Stats SA

COTTON & COTTON TEXTILE ARTICLE EXPORTS (incl BLNS)

<i>Quantity / Volume</i>	2014	2015	2016	2017
Fibres (tons)	4955	3625	6198	6222
Yarns (tons)	1810	326	433	1088
Woven fabrics (tons)	2769	3497	6233	5835
Knitted fabrics (tons)	1504	1017	931	920
Home textiles (tons)	2605	2243	2265	2003
Garments (mill units)	20.9	21.1	18.6	20.4
Garments (tons)	1034	1254	9127	1228

Source: SARS (Customs)

TEXTILE & TEXTILE ARTICLE IMPORTS (Incl BLNS countries)

	2013		2014		2015		2016		2017	
	Tons	R'000	Tons	R'000	Tons	R'000	Tons	R'000	Tons	R'000
FIBRES : TOTAL	89778	1683743	70871	1757692	59784	1834978	61219	2247671	62614	2136594
Wool	11677	164228	8444	267618	8572	533697	11221	775397	9661	709436
Cotton	45675	774391	31519	601351	21822	410388	18581	408448	22498	531790
Synthetic	27642	710154	26322	846995	23669	832662	24791	1022587	23635	850560
YARNS : TOTAL	54179	1620166	49445	1726349	51118	1840705	56186	2097379	56484	2040732
Wool	148	8748	71	8225	47	6411	37	4284	41	5354
Cotton	13172	316663	8413	297736	7784	286874	8395	369083	9460	409894
Vegetable	664	8028	619	9031	647	9862	554	11605	630	12807
Filament	32024	976427	33364	1122488	34328	1178460	37570	1287798	35760	1183912
Synthetic	8164	307395	6972	285514	8302	354600	9623	420493	10588	425717
FABRICS : TOTAL	145697	5361845	129287	6152950	144341	7068097	133495	7230432	153538	7471140
Silk	505	35355	607	36741	910	54892	569	49678	129	14456
Wool	161	29994	134	31099	110	32373	82	26103	93	18867
Cotton	37896	1013237	16903	1159449	17519	1305883	15958	1348643	18662	1497067
Vegetable	2061	127746	2797	165058	2358	180625	1641	171752	1353	113632
Filament	39264	1310149	43725	1538414	45158	1710670	43885	1756443	37250	1756715
Spun Synthetic	32534	1257294	24534	1258257	29018	1360734	25221	1398910	39578	1290842
Woven pile	4412	171012	2751	159412	3049	178319	2672	156789	2386	135032
Knitted	28864	1417058	37835	1804520	46219	2244601	43467	2322115	54088	2644530
DOMESTIC TEXTILES	27565	1407554	25086	1385003	20994	1579189	19667	1562993	22757	1545447
MISCELLANEOUS	-	4653994	-	5176446	-	6031831	-	6142330	-	6019645
TEXTILES : TOTAL	-	14727302	-	16198440	-	18354800	-	19280805	-	19213558
GARMENTS : TOTAL	-	16951130	-	18713084	-	22105700	-	23745733	-	22309691
Knitted	-	8439265	-	9215139	-	10675506	-	11174107	-	10431380
Woven	-	8511865	-	9497944	-	11430194	-	12571625	-	11878310

Source: SARS (Customs & Excise)

TEXTILE & TEXTILE ARTICLE EXPORTS (Incl BLNS countries)

	2013		2014		2015		2016		2017	
	Tons	R'000	Tons	R'000	Tons	R'000	Tons	R'000	Tons	R'000
FIBRES : TOTAL	63724	3972434	66277	4187589	69492	4660050	82330	5681717	86053	6545569
Wool	51173	3726150	50098	3822518	51812	4278326	53662	5103997	55491	5908068
Cotton	5236	95163	4955	105773	3625	68915	6198	136193	6222	141463
Synthetic	7272	149811	11180	257797	13927	311089	22312	436501	24235	494429
YARNS : TOTAL	7990	332640	4634	299076	3244	264802	3489	317448	5022	392209
Wool	925	108089	462	119404	363	102927	421	143584	394	138667
Cotton	4028	121218	1810	63896	326	18734	433	23359	1088	54560
Vegetable	177	13411	312	27009	319	26104	42	1993	35	541
Filament	2548	78180	1883	79265	2066	106102	2347	133772	2663	156685
Spun Synthetic	307	11470	166	9484	169	10811	246	14709	840	41106
FABRICS : TOTAL	13467	899265	14831	946874	13348	1194544	17107	1139368	15504	1234768
Silk	490	20036	406	27634	639	39483	446	29323	528	32482
Wool	211	33555	111	19886	56	15934	43	10754	78	18205
Cotton	2725	177591	2769	204520	3497	245191	6233	263033	5835	404937
Vegetable	272	10299	71	5516	69	6218	70	8155	282	10676
Filament	4506	272575	4473	308493	4375	339132	5986	387146	4488	362923
Spun Synthetic	1566	135583	1296	82750	1432	90377	1075	101941	892	83541
Woven pile	343	21405	249	12513	124	6939	193	13015	203	7372
Knitted	3354	228221	5456	285563	3155	451270	3061	326001	3198	314632
DOMESTIC TEXTILES	11614	643773	12527	710704	10120	704548	12570	627266	7663	621151
MISCELLANEOUS	-	2200057	-	2422319	-	2491881	-	2728098	-	2867957
TEXTILES : TOTAL	-	8048447	-	8566562	-	9315826	-	10493897	-	11661654
GARMENTS : TOTAL	-	4205710	-	4640282	-	5118382	-	5247653	-	5253019
Knitted	-	2128622	-	245656	-	2704409	-	2718026	-	2864244
Woven	-	2077089	-	2183826	-	2413973	-	2529627	-	2388776

Source: SARS (Customs & Excise)

RETAIL TRADE SALES [*Constant 2012 and current prices*]

R ('million)	2012	2013	2014	2015	2016
Total constant 2012	694 364	712 158	725 510	748 607	762 788
Total current prices	694 363	741 034	795 519	855 879	926 561
<i>TCFL constant 2012</i>	<i>n/a</i>	<i>145 543</i>	<i>147 982</i>	<i>155 227</i>	<i>147 757</i>
<i>TCFL current prices</i>	<i>n/a</i>	<i>149 519</i>	<i>160 475</i>	<i>175 947</i>	<i>177 348</i>

*Source: Stats SA**TCFL: Textiles, Clothing, Footwear & Leather***RETAIL TRADE SALES** [*Constant 2015 and current prices*]

R ('million)	2013	2014	2015	2016	2017
Total constant 2015	825 828	841 368	869 176	883 754	911 000
Total current prices	7520540	807 870	869 176	939 250	1 006 249
<i>TCFL constant 2015</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>
<i>TCFL current prices</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>177 564</i>

*Source: Stats SA**TCFL: Textiles, Clothing, Footwear & Leather**Sources of information:**Statistics SA**SARS (Customs & Excise)**Cotton SA**Textile Federation***Compiled by Cotton SA
May 2018***www.cottonsa.org.za**Tel (012) 8041462*

