

SOUTH AFRICAN TEXTILE & CLOTHING STATISTICS

2012 - 2016



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 and improve the capacity in the cotton industry value chain for sustainable textiles and apparel.

STATISTICAL INFORMATION

CONSUMER PRICE INDEX (CPI)

Base: 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

Source: Stats SA

PRODUCTION PRICE INDEX (PPI)

2012=100 PPI for final manufactured goods	Total Manufacturing	Textiles	Clothing
2012	100	100	100
2013	106.0	104.7	105.6
2014	113.8	109.8	113.8
2015	118.3	116.0	119.8
2016	126.3	120.6	129.5

Source: Stats SA

INDEX OF PHYSICAL VOLUME OF PRODUCTION

2010=100	2012	2013	2014	2015	2016
Total Manufacturing	105.2	106.7	106.4	106.6	107.2
Spin, weave, finish	86.1	82.6	81.8	84.4	88.3
Other textiles	97.5	95.2	96.2	92.8	93.7
Knitting mills (fabrics & garments)	71.7	65.4	57.7	54.0	52.7
Clothing	101.6	101.2	101.7	101.0	96.1

Source: Stats SA (Seasonally adjusted)

VALUE OF SALES (EX-FACTORY)

R (Million)	2012	2013	2014	2015	2016
Total Manufacturing	1509672	1677477	1820517	1865263	2005684
Spin, weave, finish	4448	5380	6342	6996	8198
Other textiles	10607	10454	11737	13968	14340
Total Textiles	15055	15834	18079	20964	22538
Knitting mills (fabrics & garments)	1653	1727	2048	2376	2396
Wearing apparel	14674	15447	16928	15334	17354

Source: Stats SA (Actual values)

EMPLOYMENT

No of employees	2012	2013	2014	2015	2016
Average per annum	No	No	No	No	No
Total Manufacturing	1151000	1145000	1137000	1134000	1185000
Textiles	32293	31765	29947	29718	32214
- Spin, weave, finish	8109	7813	7690	7853	9010
- Other textiles	24184	23952	22257	21864	23204
Knitting mills (fabrics & garments)	4878	4948	4750	4638	4885
Clothing	47319	42025	40841	41130	41160

Source: Stats SA

COTTON LINT STATISTICS

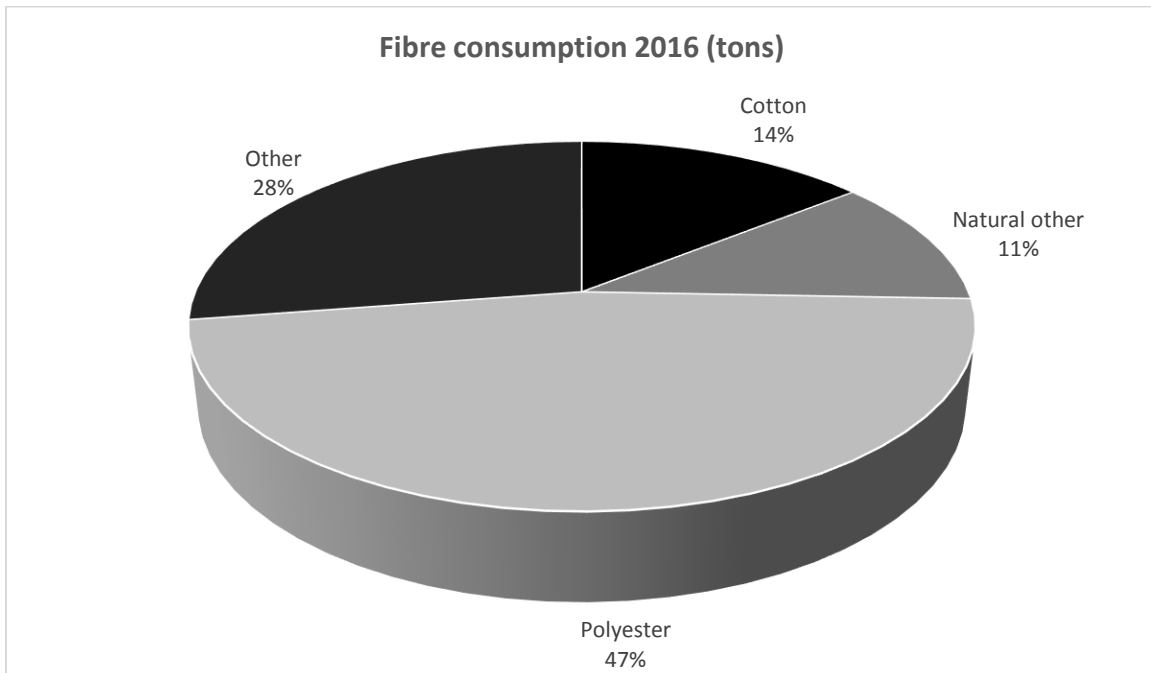
SOUTH AFRICA	Production	Imports	Exports	Local consumption	SA price
	Tons'000	Tons'000	Tons'000	Tons'000	c/kg
2011/12	13	16	14	20	1364
2012/13	6	17	11	19	1508
2013/14	10	19	3	22	1674
2014/15	10	18	7	21	1852
2015/16est	17	19	11	21	1903
2016/17est	9	18	9	21	2000
WORLD	Production	Imports	Exports	Consumption	Cotlook A price
	Tons (mill)	Tons (mill)	Tons (mill)	Tons (mill)	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	21.1	7.5	7.6	24.1	70
2016/17est	22.9	7.8	7.8	24.1	75
2017/18est	23.4	8.2	8.2	24.3	

Source: Cotton SA

SOUTH AFRICAN FIBRE CONSUMPTION (Mill level)

TONS	2012	2013	2014	2015	2016
Cotton	19800	21000	22000	23000	17680
Wool & mohair	2047	4963	4896	15943	7368
Jute, sisal, etc	4974	4749	4255	5634	6626
Polyester staple	30106	11755	9570	7905	31056
Polyester CF	19978	24358	23362	22583	26966
Nylon	9799	10386	10311	10351	288
Acrylic	5633	2469	5127	4462	6287
Viscose	689	717	552	484	555
Polyprop/HDPE	24551	21707	21901	19953	18357
Other	6435	15388	12581	5096	8440
TOTAL	124012	117492	114555	115311	123623

** Preliminary/estimates*



COTTON & COTTON TEXTILE ARTICLE IMPORTS (incl BLNS)

Quantity / Volume	2014	2015	2016
Fibres (tons)	31519	21822	18581
Yarns (tons)	8413	7784	8395
Woven fabrics (tons)	16903	17519	15958
Knitted fabrics (tons)	2886	3122	3338
Home textiles (tons)	8376	9327	8163
Garments (mill units)	240.2	246.7	233.6
Garments (tons)	5404	5647	7729

Source: SARS (Customs)

UTILISATION OF PRODUCTION CAPACITY (%)

Percentage	2012	2013	2014	2015	2016
Total Manufacturing	82	82	81	81	82
Textiles	71	72	70	71	68
Clothing	80	81	80	79	78

Source: Stats SA

COTTON & COTTON TEXTILE ARTICLE EXPORTS (incl BLNS)

Quantity / Volume	2014	2015	2016
Fibres (tons)	4955	3625	6198
Yarns (tons)	1810	326	433
Woven fabrics (tons)	2769	3497	6233
Knitted fabrics (tons)	1504	1017	931
Home textiles (tons)	2605	2243	2265
Garments (mill units)	20.9	21.1	18.6
Garments (tons)	1034	1254	9127

Source: SARS (Customs)

TEXTILE & TEXTILE ARTICLE IMPORTS (Incl BLNS countries)

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

Source: SARS (Customs & Excise)

SARS only started to include the volume and value of trade with the BLNS countries from 2013 onwards.

TEXTILE & TEXTILE ARTICLE EXPORTS (Incl BLNS countries)

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

Source: SARS (Customs & Excise)

SARS only started to include the volume and value of trade with the BLNS countries from 2013 onwards.

RETAIL TRADE SALES [Constant 2012 and current prices]

R ('million)	2012	2013	2014	2015	2016
Total constant 2012	694364	712158	725510	748607	762788
Total current prices	694363	741034	795519	855879	926561
TCFL constant 2012	n/a	145543	147982	155227	147757
TCFL current prices	n/a	149519	160475	175947	177348

Source: Stats SA

TCFL: Textiles, Clothing, Footwear & Leather

POPULATION

	Population million	Unemployment %
2012	52.4	
2013	53.2	
2014	54.1	24.3
2015	55.0	24.5
2016	55.9	26.5

Source: Stats SA

Sources of information:

Statistics SA

SARS (Customs & Excise)

Cotton SA

Textile Federation

**Compiled by Cotton SA
May 2017**

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