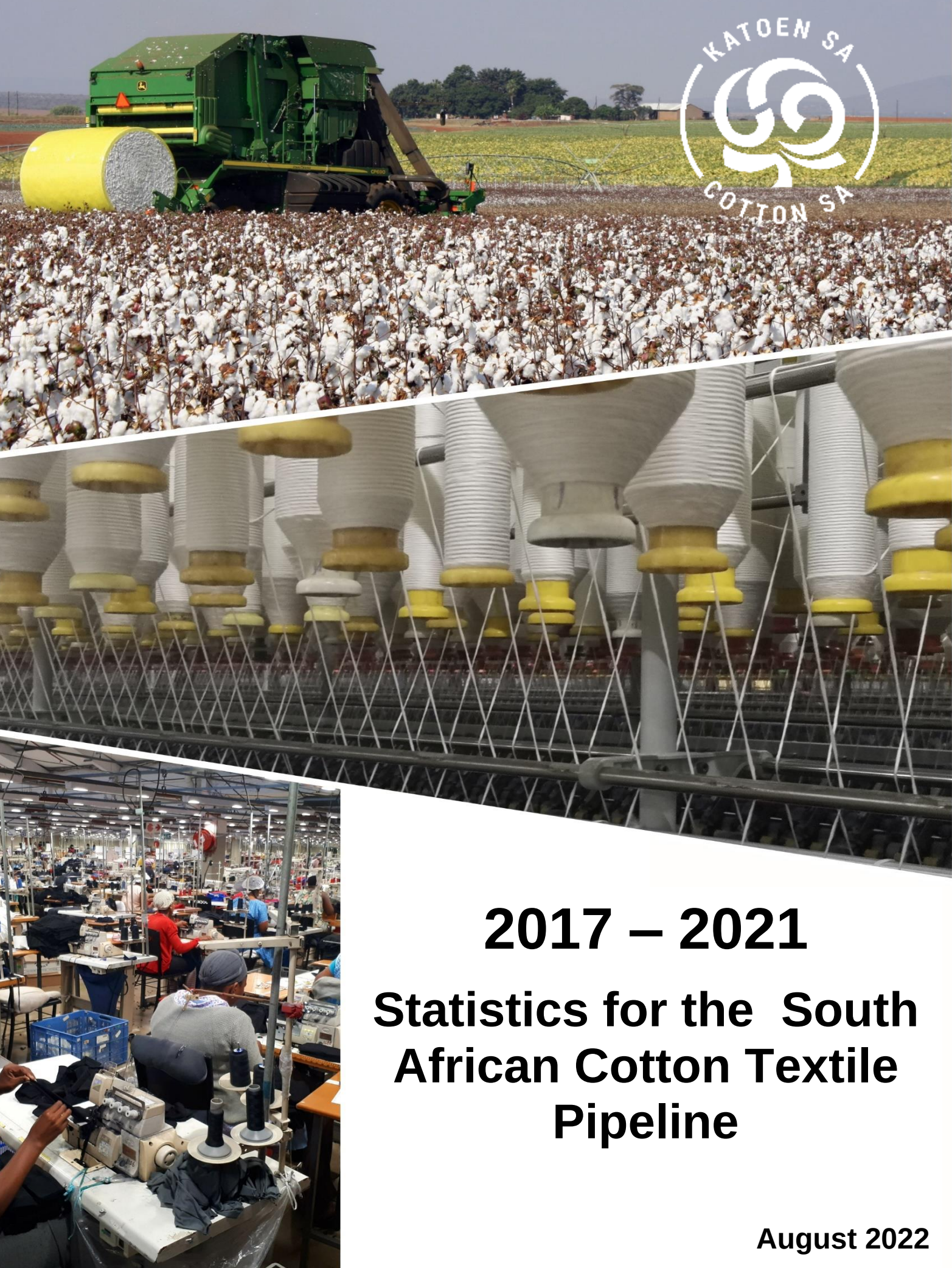




2017 – 2021

Statistics for the South African Cotton Textile Pipeline

August 2022

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STATISTICAL INFORMATION

SOUTH AFRICAN TEXTILE INDUSTRY STATISTICS SUMMARY 2017 – 2021

	2017	2018	2019	2020	2021
General:					
Employment (average)*	30 102	28 325	29 369	27 154	26 763
Sales (R'mill)	22 698	22 970	24 705	22 036	26 229
Imports (R'mill)	19 214	20 105	20 347	26 218	23 014
Exports (R'mill)	11 662	12 581	11 937	12 167	14 278
Fabric production (mill m ²)**					
Cotton	80	79	74	69	85
Spun synthetic	82	81	76	70	87
Continuous filament	27	26	25	23	28
Worsted	3	3	3	3	3
Wovens - total	192	189	178	164	204
Knitted	63	63	56	39	44
Fabrics – total	255	252	233	203	249
Fibre consumption ('000 tons)**	97	99	96	89	87
Cotton lint consumption ('000 tons)	23	19	19	10	19
Spun yarn production ('000 tons)**	30	30	28	27	32

Source: Textile Federation * Excluding knitting mills ** Estimates

NOTE: The Covid-19 pandemic and the lockdown during 2020 had a negative effect on the local textile and clothing industries, with some recovery during 2021.

CONSUMER PRICE INDEX (CPI)

Base: 2016 = 100			
	TOTAL "All items"	CLOTHING	HOME TEXTILES
2017	103.0	101.1	97.8
2018	107.8	103.1	94.9
2019	111.7	105.2	91.0
2020	115.9	106.7	92.1
2021	121.1	108.0	91.7

Source: Stats SA

INFLATION RATE (%)

	Official inflation rate (%)
2017	5.3
2018	4.7
2019	4.4
2020	3.3
2021	4.5

Source: SA Reserve Bank

PRODUCTION PRICE INDEX (PPI)

2020=100 PPI for final manufactured goods	Manufacturing	Textiles	Clothing
2017	87.0	89.1	88.4
2018	91.7	93.0	93.1
2019	96.0	98.3	96.4
2020	98.3	99.7	99.3
2021	105.3	102.6	103.5

Source: Stats SA

The PPI measures the changes in the price of locally produced commodities. It is a measure of the change in the prices of goods either as they leave the factory or as they enter the production process.

INDEX OF PHYSICAL VOLUME OF PRODUCTION

2015=100	2017	2018	2019	2020	2021
Manufacturing	99.2	101.3	100.5	91.0	94.1
Spin, weave, finish	103.3	101.5	95.5	88.4	109.8
Other textiles	98.3	101.4	90.3	69.9	79.5
Knitting mills (fabrics & garments)	93.8	94.2	82.9	57.9	66.0
Clothing	85.5	84.4	80.7	68.0	57.2

Source: Stats SA (Seasonally adjusted)

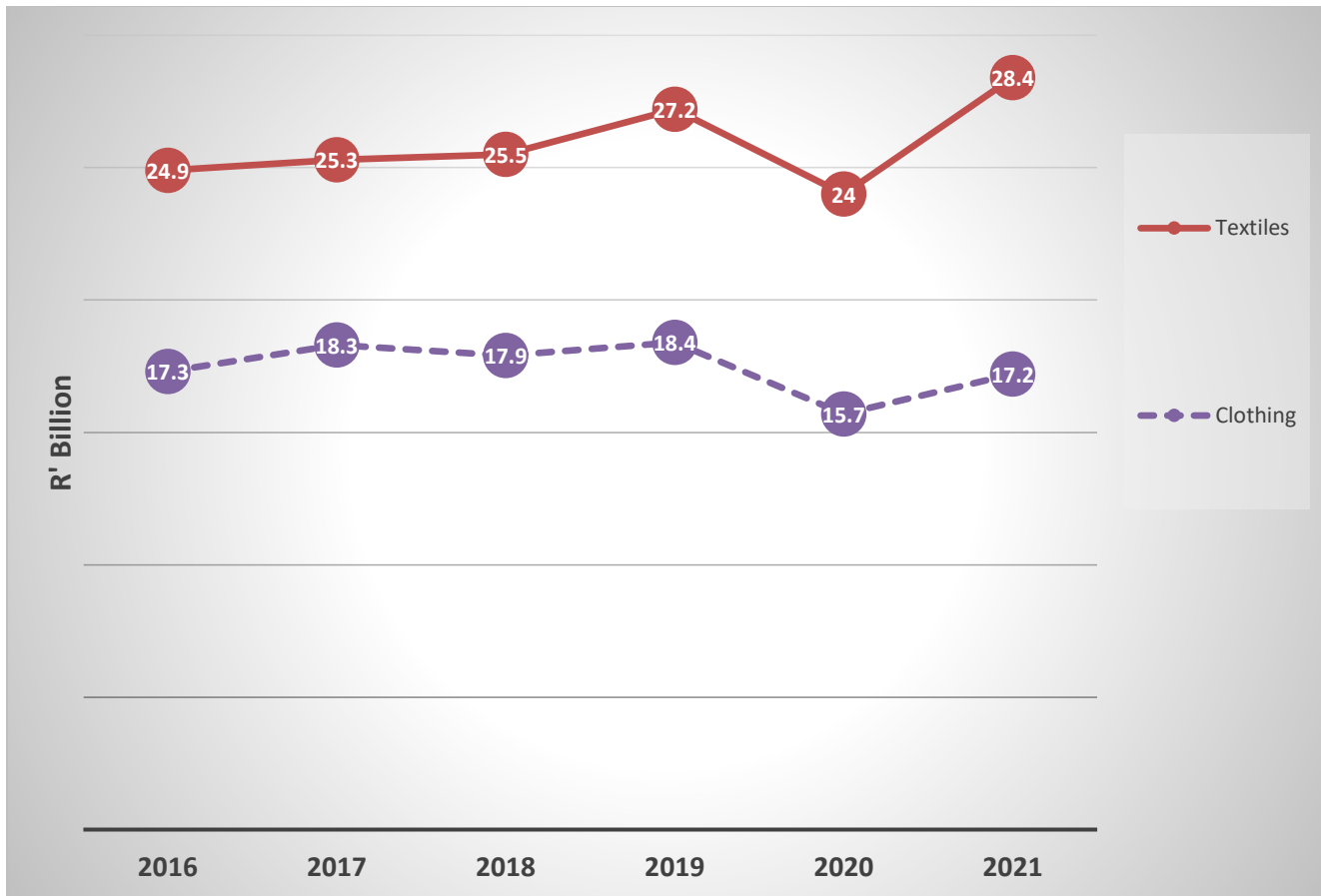
2020/21 was the height of the Covid-19 pandemic.

VALUE OF SALES (EX-FACTORY)

R'Million	2017	2018	2019	2020	2021
Manufacturing (total)	2 137 631	2 323 822	2 396 753	2 145 195	2 528 214
Spin, weave, finish	8 385	7 134	7 555	7 281	8 903
Other textiles	14 313	15 836	17 168	14 755	17 326
Total Textiles	22 698	22 970	24 723	22 036	26 229
Knitting mills (fabrics & garments)	2 622	2 562	2 524	1 943	2 218
Wearing apparel	18 295	17 922	18 393	15 685	17 246
TOTAL Textiles & Clothing	43 615	43 454	45 642	39 664	45 692

Source: Stats SA (Actual values) Include all products

Graph 1: VALUE OF SALES



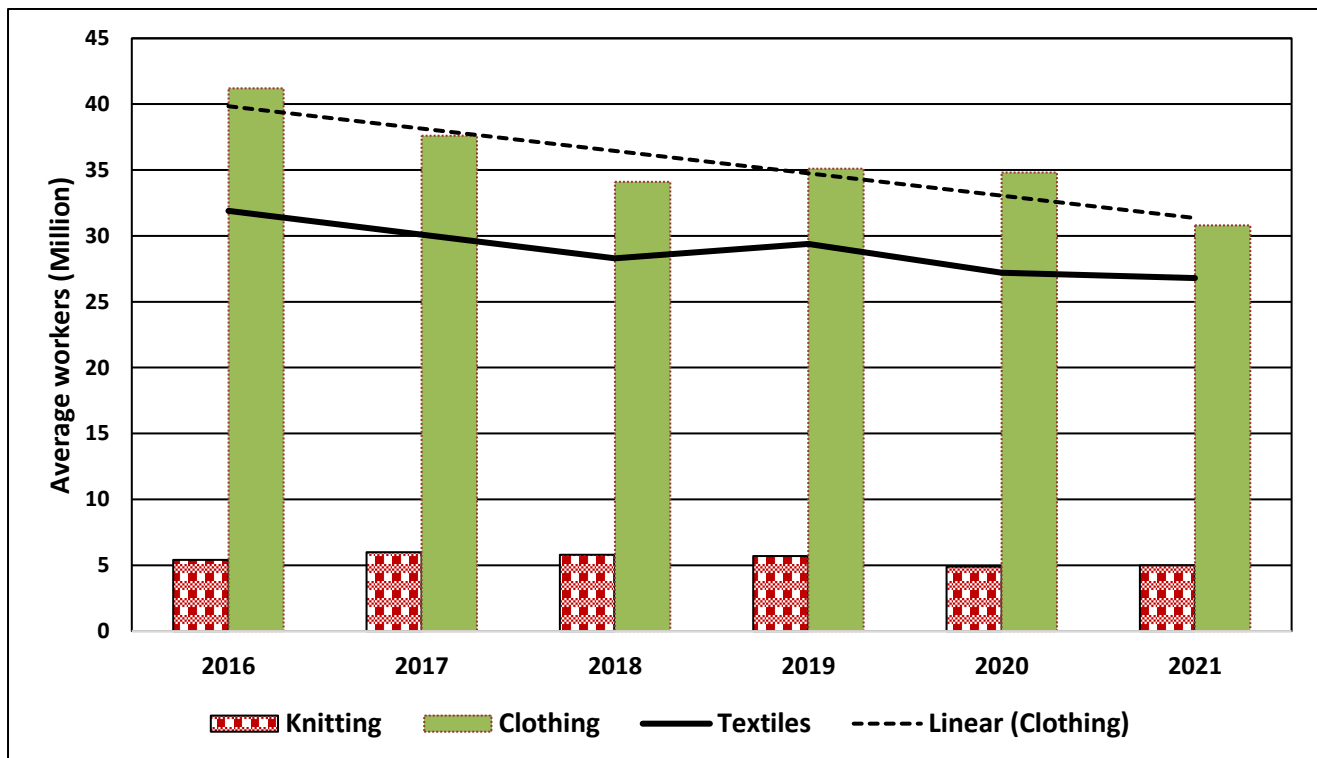
EMPLOYMENT

No of employees ('000)	2017	2018	2019	2020	2021
Average per annum	No	No	No	No	No
Manufacturing	1 193	1 221	1 220	1 135	1118
Textiles & Clothing	73.7	68.3	70.2	62.0	62.5
Textiles	30.1	28.3	29.4	27.2	26.8
- Spin, weave, finish	8.3	7.4	7.4	6.8	6.6
- Other textiles	21.8	20.9	22.0	20.3	20.2
Knitting mills (fabrics & garments)	6.0	5.8	5.7	4.9	5.0
Clothing	37.6	34.1	35.1	34.8	30.8

Source: Stats SA

Employment in the manufacturing industry represents approximately 12% of the total South African employment. Textiles and clothing represent approximately 5.6% of total manufacturing employment. The unemployment rate for 2021 was set at 35%.

Graph 2: EMPLOYMENT



COTTON STATISTICS

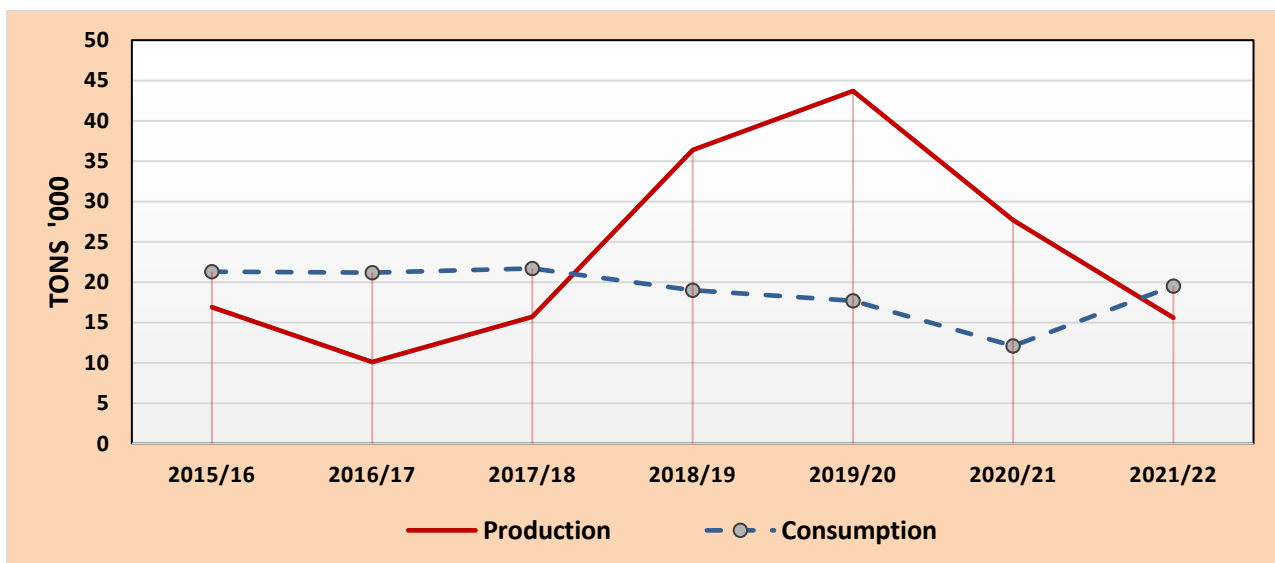
SOUTH AFRICA	Production Tons'000	Imports Tons'000	Exports Tons'000	Local consumption Tons'000	SA lint price estimates c/kg
2015/16	16.9	19.3	11.4	21.3	1 903
2016/17	10.1	16.5	9.0	21.2	2 261
2017/18	15.7	14.2	8.4	21.7	2 362
2018/19	36.5	15.9	26.0	19.0	2 191
2019/20	43.7	12.1	35.7	17.7	2 269
2020/21	27.7	7.5	28.7	12.1	2 156
2021/22	15.6	18.2	14.6	19.5	2 537
WORLD	Production Tons (mill)	Imports Tons (mill)	Exports Tons (mill)	Consumption Tons (mill)	Cotlook A price US c/lb
2015/16	23.1	7.6	7.5	24.5	70
2016/17	26.7	8.1	8.2	27.0	83
2017/18	25.9	8.9	9.0	26.9	88
2018/19	25.7	9.2	9.2	26.1	84
2019/20 est	24.7	8.8	8.8	26.2	71
2020/21 est	24.6	9.8	9.8	25.0	85
2021/22 est	25.9	10.1	10.1	26.2	130

Source: Cotton SA (local) and ICAC (world)

During 2021 South Africa exported cotton textiles (fibres excluded) to the value of approximately R673.4 million, while it imported cotton textiles (fibres excluded) to the value of about R2 007 million.

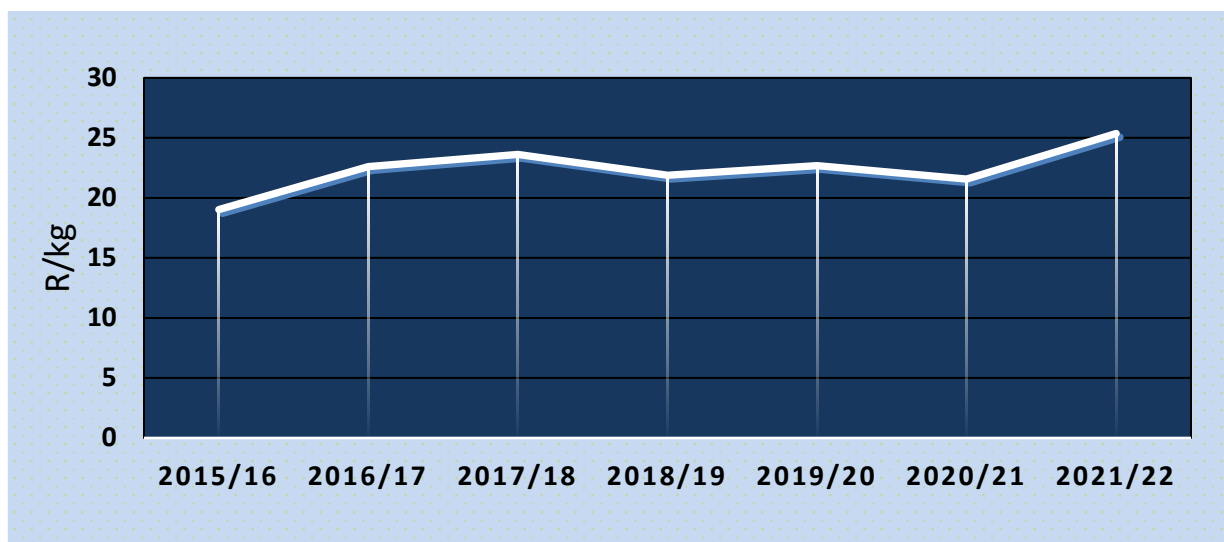
Cotton clothing to the value of R1 782 million has been exported while R14 138 million has been imported.

Graph 3: SOUTH AFRICAN COTTON
(fibre (lint) production & consumption)



Source: Cotton SA

Graph 4: SA cotton lint prices R/kg



Source: Cotton SA

RAW MATERIAL PRICES (R/kg)

TONS	2017	2018	2019	2020	2021
Locally produced lint	23.62	21.91	22.69	21.56	25.37
Average fob price of imported fibres:					
Cotton lint	24.11	25.44	23.69	25.37	28.60
Polyester	15.96	19.59	19.71	18.15	18.75
Nylon	48.47	89.95	62.30	53.25	75.11
Acrylic	41.22	47.97	40.43	41.18	45.06
Viscose	31.43	33.00	32.98	39.07	44.80

*Source: Cotton SA (local) and SARS (imported)

SOUTH AFRICAN FIBRE CONSUMPTION (estimates)

TONS	2017	2018	2019	2020	2021
Cotton*	22 602	18 907	19 195	16 463	19 396
Wool & mohair	6 970	3 430	4 075	4 300	796
Jute, sisal, etc	6 887	9 218	12 247	12 696	9 787
Polyester	29 158	30 843	26 301	16 315	17 800
Nylon	10 155	10 292	10 212	12 060	10 894
Acrylic	5 342	2 640	4 432	3 936	2 526
Viscose	470	428	516	403	455
Polyprop/HDPE	20 521	17 337	17 703	21 382	23 818
Other	3 926	4 408	923	1 769	1 800
TOTAL	109 876	106 037	95 604	89 324	87 345

*Source: Cotton SA

Cotton fibre consumption represented about 22% of total fibre consumption in 2021.

TEXTILE & CLOTHING EXPORTS TO CERTAIN MAJOR REGIONS

R 'MILLION	2017	2018	2019	2020	2021
EU	2 735	3 037	3 310	2 552	2 567
SADC	8 544	8 592	9 084	8 564	10 355
India	154	163	296	82	475
China	3 788	3 939	2 719	3 740	3 852
USA	330	322	438	393	512

Source: SARS

SADC is the major receiver of locally produced of cotton textile and textile products.

TEXTILE & CLOTHING IMPORTS FROM CERTAIN MAJOR REGIONS

R 'MILLION	2017	2018	2019	2020	2021
EU	2 637	3 202	3 221	2 864	3 091
SADC	9 954	10 157	9 510	10 183	12 886
India	2 373	2 598	2 864	5 698	2 841
China	18 990	20 624	21 818	27 857	23 741
USA	540	708	723	620	734

Source: SARS

Although China is still the major source for imports, the situation in respect of cotton textiles and textile products is different. In terms of cotton SADC is the major source, with China second.

FIBRE CONTENT OF FABRIC IMPORTS (estimates)

TONS	2017	2018	2019	2020	2021
Wool	160	266	141	63	115
Cotton	28 280	32 290	29 422	24 519	24 718
Vegetable	1 353	1 717	2 216	2 129	2 410
Nylon filament	5 612	8 766	8 805	7 097	4 849
Polyester filament	20 153	22 848	23 911	21 604	25 768
Synth filament (other)	28 149	26 216	27 597	28 586	22 381
Artificial filament	1 032	1 700	2 242	2 736	2 027
Polyester staple	14 182	14 561	13 695	9 773	11 522
Acrylic	200	2 386	1 531	590	175
Synth staple (other)	26 944	26 442	25 103	21 819	35 541
Artificial staple	25 109	32 493	31 558	23 248	15 615
Silk	129	218	176	128	168
TOTAL	151 302	169 901	166 398	142 292	145 290

Source: SARS (Customs)

UTILISATION OF PRODUCTION CAPACITY (%)

Percentage	2017	2018	2019	2020	2021
Manufacturing	81.4	81.3	80.9	72.3	77.6
Textiles	65.6	66.4	66.4	60.5	66.2
Clothing	75.7	75.3	75.6	68.8	72.6

Source: Stats SA

Capacity utilisation in the textile sector continues to be less than 70%, while clothing is less than 80%. Insufficient demand is the reason for the under-utilisation of production capacity, which is partly the result of the continued increase in imports. The Covid-19 lockdown in 2020/21 had a major impact on local production.

RETAIL TRADE SALES [Constant 2015 and current prices]

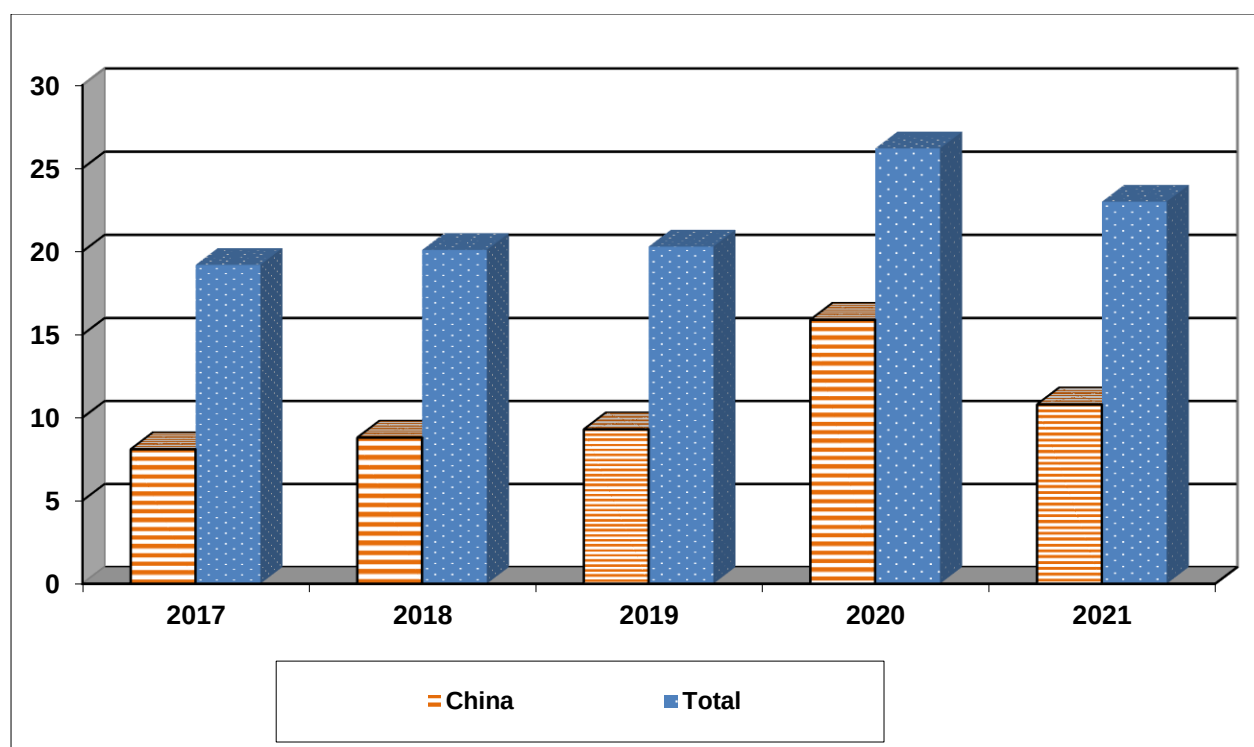
R ('million)	2017	2018	2019	2020	2021
Total constant 2015	911 000	928 352	953 959	890 666	956 668
Total current prices	1 006 249	1 045 685	1 092 921	1 050 442	1 161 114
TCFL constant 2015	177 564	163 150	171 303	151 136	172 942
TCFL current prices	177 570	181 130	185 391	163 902	189 019

Source: Stats SA

TCFL: Textiles, Clothing, Leather & Footwear

Graph 5: TEXTILE IMPORTS: CHINA vs TOTAL

Actual values (R'billion)



Source: SARS Graph is in respect of textiles (excluding clothing).

China remains the major supplier of textiles to South Africa.

TEXTILE & TEXTILE ARTICLE EXPORTS (excl BELN)

R'000 (fob)	2017	2018	2019	2020	2021
FIBRES - Total	6 462 606	7 175 406	6 281 494	6 035 097	7 449 278
Wool	5 900 393	6 194 481	5 223 423	5 021 682	6 072 794
Cotton (all fibres)	69 155	347 368	323 727	228 395	131 843
Synthetic	492 233	631 988	732 721	784 316	1 226 684
YARNS - Total	263 618	317 890	362 460	380 956	341 811
Wool	135 329	175 821	226 952	233 831	224 260
Cotton	7 429	9 327	11 298	12 020	12 541
Vegetable	431	67	212	118	244
Filament	113 373	125 140	116 437	128 332	96 610
Spun synthetic	7 024	7 535	7 268	6 403	7 972
FABRICS – Total	314 009	271 710	262 280	230 537	274 706
Silk	6 834	3 991	2 600	3 800	7 239
Wool	15 591	19 740	10 969	1 480	5 459
Cotton	21 354	27 240	23 567	20 405	27 627
Vegetable	7 484	2 102	2 455	2 087	2 971
Filament	99 342	94 110	74 567	64 421	66 428
Spun synthetic	24 513	23 632	25 732	44 958	39 527
Woven pile	1 850	3 856	2 088	3 399	2 045
Knitted	137 041	97 040	120 303	89 987	123 409
DOMESTIC TEXTILES	199 841	220 341	180 759	165 784	197 544
MISCELLANEOUS	1 971 762	2 144 762	2 262 238	2 957 767	2 945 280
TOTAL – TEXTILES	9 211 945	10 130 109	9 349 231	9 770 141	11 208 619
GARMENTS – Total	1 022 396	1 168 376	1 227 027	1 133 023	1 205 246
Knitted	520 961	614 727	666 273	490 308	543 655
Other	501 435	553 648	560 754	642 715	661 590

Source: SARS

TEXTILE & TEXTILE ARTICLE EXPORTS (incl BELN)

R'000 (fob)	2017	2018	2019	2020	2021
FIBRES - Total	6 545 569	7 246 663	6 361 820	6 134 726	7 682 808
Wool	5 908 068	6 199 496	5 229 836	5 031 282	6 082 430
Cotton (all fibres)	141 463	409 767	389 521	309 801	347 824
Synthetic	494 429	634 943	739 052	791 119	1 232 647
YARNS - Total	392 209	407 095	434 719	444 076	492 609
Wool	138 667	178 376	230 141	236 879	227 001
Cotton	54 560	54 330	45 746	36 017	117 394
Vegetable	541	262	318	306	4 934
Filament	156 685	157 977	145 088	158 690	127 340
Spun synthetic	41 106	16 038	13 042	11 927	15 744
FABRICS – Total	1 234 768	1 289 305	1 323 452	1 091 467	1 464 874
Silk	32 482	38 933	29 435	31 796	37 540
Wool	18 205	23 261	13 670	8 200	8 983
Cotton	404 937	466 539	451 015	365 912	555 972
Vegetable	10 676	5 369	4 201	3 814	5 102
Filament	362 923	412 716	423 727	371 701	440 302
Spun synthetic	83 541	82 318	110 544	111 183	104 256
Woven pile	7 372	6 958	8 210	14 655	14 019
Knitted	214 632	253 212	282 650	184 206	298 699
DOMESTIC TEXTILES	621 151	636 115	602 450	539 634	643 633
MISCELLANEOUS	2 867 957	3 001 900	3 214 102	3 957 279	3 993 592
TOTAL – TEXTILES	11 661 654	12 581 078	11 936 653	12 167 182	14 277 516
GARMENTS – Total	5 253 019	5 296 132	5 591 297	4 946 905	6 075 954
Knitted	2 864 244	2 917 026	2 939 174	2 410 124	3 020 344
Other	2 388 776	2 379 107	2 652 123	2 536 784	3 055 610

Source: SARS

TEXTILE & TEXTILE ARTICLE IMPORTS (Excl BELN countries)

	2017		2018		2019		2020		2021	
	Tons	R'mill	Tons	R'mill	Tons	R'mill	Tons	R'mill	Tons	R'mill
FIBRES – TOTAL	53 977	1 568	50 852	1 649	52 555	1 661	41 748	1 415	51 169	1620
Wool	2 639	189	2 201	245	1 992	207	1 203	137	985	167
Cotton (all fibres)	21 387	485	14 934	373	14 011	328	6 923	177	13 373	380
Synthetic	23 133	850	24 410	971	24 298	1 044	50 847	993	27 006	995
YARNS – TOTAL	53 762	1 914	53 501	2 078	52 414	2 128	43 849	1 749	53 548	2 353
Filament	35 378	1 173	35 328	1 307	33 463	1 279	27 201	1 012	33 078	1 334
Wool	40	5	423	36	606	44	316	26	611	45
Vegetable	630	13	655	14	692	16	550	13	725	17
Cotton	7 212	299	6 965	285	7 746	336	8 477	357	9 393	457
Synthetic	10 498	421	10 123	430	9 863	434	7 290	327	9 720	479
FABRICS – TOTAL	149 784	7 176	189 879	7 491	162 958	8 801	139 388	6 805	141 411	8 362
Filament	36 946	1 748	41 515	1 974	42 798	2 073	46 184	1 888	42 133	2 317
Wool	88	19	225	25	127	21	50	14	98	32
Vegetable	1 352	114	1 717	154	2 196	203	2 192	185	2 407	228
Cotton	17 155	1 406	43 290	1 323	16 921	1 332	12 246	1 067	14 158	1 335
Spun synthetic	39 562	1 289	47 586	1 285	46 378	1 289	30 177	1 208	23 737	1 301
Woven pile	2 386	135	1 764	140	2 447	163	1 627	130	1 815	145
Knitted	52 190	2 451	53 587	2 560	51 916	2 593	46 785	2 293	56 897	2 982
DOMESTIC TEXTILES	21 081	1 305	23 582	1 453	21 709	1 483	15 864	1 212	19 080	1 436
MISCELLANEOUS	-	5 704	-	5 943	-	5 905	-	13 197	-	7 001
TEXTILES - TOTAL	-	17 668	-	18 614	-	18 879	-	24 378	-	20 772
GARMENTS - TOTAL	-	17 980	-	19 935	-	21 781	-	20 031	-	43 431
Knitted	-	9 026	-	9 777	-	10 985	-	9 984	-	12 402
Other	-	8 954	-	10 158	-	10 796	-	10 047	-	10 257

Source: SARS

TEXTILE & TEXTILE ARTICLE IMPORTS (Incl BELN countries)

	2017		2018		2019		2020		2021	
	Tons	R'mill	Tons	R'mill	Tons	R'mill	Tons	R'mill	Tons	R'mill
FIBRES – TOTAL	61 219	2 248	62 614	2 137	53 723	1 852	55 483	1 832	59 071	2 390
Wool	11 221	775	9 661	709	4 519	443	3 309	320	7 826	893
Cotton (all fibres)	18 581	408	22 498	532	15 183	377	15 622	384	14 434	423
Synthetic	24 791	1 023	23 635	851	24 713	971	24 298	1 044	27 006	995
YARNS – TOTAL	56 186	2 097	56 484	2 041	55 879	2 181	53 124	2 163	55 496	2 460
Wool	37	4	41	5	423	36	606	44	611	45
Cotton	8 395	369	9 460	410	9 293	387	8 445	370	11 309	563
Vegetable	554	12	630	13	655	14	692	16	725	17
Filament	37 570	1 288	35 760	1 184	35 362	1 308	33 471	1 280	33 107	1 335
Synthetic	9 623	420	10 588	426	10 140	431	9 866	434	9723	479
FABRICS – TOTAL	133 495	7 230	153 538	7 471	168 453	7 818	166 837	8 047	145 865	8 777
Silk	569	50	129	14	216	29	176	27	168	24
Wool	82	26	93	19	225	25	127	21	98	32
Cotton	15 958	1 349	18 662	1 497	19 387	1 416	18 300	1 431	15 498	1 444
Vegetable	1 641	172	1 353	114	1 717	154	2 216	204	2 410	228
Filament	43 885	1 756	37 250	1 757	42 032	1 999	43 289	2 098	42 952	2 351
Spun Synthetic	25 221	1 399	39 578	1 291	47 606	1 287	46 401	1 293	23 911	1 323
Woven pile	2 672	157	2 386	135	1 766	140	2 447	163	1 816	145
Knitted	43 467	2 322	54 088	2 645	55 504	2 767	53 881	2 810	59 013	3 231
DOMESTIC TEXTILES	19 667	1 563	22 757	1 545	26 798	1 985	25 064	2 051	22 157	2 032
MISCELLANEOUS	-	6 142	-	6 020	-	6 269	-	6 256	-	7356
TEXTILES - TOTAL	-	19 281	-	19 214	-	20 105	-	20 347	-	23 015
GARMENTS - TOTAL	-	23 746	-	22 310	-	24 434	-	26 870	-	28 113
Knitted	-	11 174	-	10 431	-	11 120	-	12 465	-	14 184
Other	-	12 572	-	11 878	-	13 314	-	14 406	-	13 929

Source: SARS

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