



National Agricultural  
Marketing Council  
Promoting market access for South African agriculture

# Markets and Economic Research Centre

## Macroeconomic Digest



*An Update on Selected  
Macroeconomic Indicators*

*Labour – November 2022*

## EXECUTIVE SUMMARY

The Quarterly Labour Force Survey (QLFS) published by Statistics South Africa on 29 November 2022 provides an overview of the observed changes in the key labour market indicators between the third quarter (July - September) of 2022 and the second quarter (April - June) of 2022. The number of employed persons increased by 204 000 to 15.8 million in the third quarter of 2022, while the number of unemployed persons decreased by 269 000 to 7.7 million compared to the second quarter of 2022, resulting in a decrease of 66 000 (down by 0.3%) in the number of people in the labour force. Stats SA (2022) observed that a large number of persons moved from the "unemployed" category to the "employed" and "not economically active" statuses between the second and third quarter of 2022, which resulted in a decrease of 1.0 percentage point in the unemployment rate to 32.9%.



During the second quarter of 2022, the number of employed persons increased in six of the ten industries. The Agricultural sector decreased by 1 000 jobs (-0.1%) and reach 873 000 jobs in the third quarter of 2022. The largest employment increase measured in percentages was recorded in the KwaZulu-Natal Province (29.6%), Western Cape (8.4%) and Free States (8.2%). While North West and Limpopo Provinces showed a decrease of 36.8% and 17.8%, respectively. Furthermore, the number of women increased by 4 000 (1.4%), while men decreased by 5 000 (0.9%) when compared to the previous quarter.

## Introduction

The Macroeconomic Digest Labour Report of the third quarter of 2022 provides an overview of employment figures by industry, province, and gender composition in the agricultural sector. The figures in this publication are based on data obtained from Statistics South Africa (Stats SA) released on 29 November 2022.

### 1. Employment by Industry

The Quarterly Labour Force Survey (QLFS) published by Stats SA provides an overview of the observed changes in the key labour market indicators between the third quarter (July - September) of 2022 and the second quarter (April - June) of 2022. The number of employed persons increased by 204 000 to 15.8 million in the third quarter of 2022, while the number of unemployed persons decreased by 269 000 to 7.7 million compared to the second quarter of 2022, resulting in a decrease of 66 000 (down by 0.3%) in the number of people in the labour force. Stats SA (2022) observed that a large number of persons moved from the "unemployed" category to the "employed" and "not economically active" statuses between the second and third quarter of 2022, which resulted in a decrease of 1.0 percentage point in the unemployment rate to 32.9%.

**Table 1** shows employment by industry between the second quarter of 2022 and the third quarter of 2022. The number of employed persons increased in six of the ten industries. The largest increase in employment was recorded in Manufacturing (123 000), followed by Trade (82 000), Construction (46 000) and Transport (33 000). While, the Finance (80 000), Private households (36 000), Mining and Agriculture (1 000 each) industries showed the largest decline in employment. The decline in the Agricultural sector might be attributed to the disruption of horticulture and livestock activities during the third quarter. From the horticultural industry point of view, there are problems with exporting citrus products to the European Union (EU), which in 2021 accounted for roughly 36% of South Africa's exports of oranges, and to Russia, which will account for 7% and now is currently battling sanctions which are anticipated to affect its economic performance. For the livestock sector, outbreaks of Foot-and-Mouth Disease (FMD) affected beef production. These may have been a factor to the overall decline in agricultural employment.

**Table 1: Quarterly and Annual total employment**

Industry	Jul-Sept 2021	Apr-June 2022	Jul-Sept 2022	Qtr.-to-qtr. change	Year-on-year change	Qtr.-to-qtr. change	Year-on-year change
	Thousand				Percentage (%)		
<b>Total*</b>	<b>14 282</b>	<b>15 562</b>	<b>15 765</b>	<b>204</b>	<b>1 483</b>	<b>1.3</b>	<b>10.4</b>
Agriculture	829	874	873	-1	43	-0.1	5.2
Mining	345	407	407	-1	62	-0.2	18.0
Manufacturing	1 402	1 507	1 630	123	229	8.2	16.3
Utilities	96	104	116	13	21	12.2	21.9
Constructing	1 157	1 177	1 223	46	66	3.9	5.7
Trade	2 778	3 163	3 245	82	468	2.6	16.8
Transport	964	906	939	33	-25	3.6	-2.6
Finance	2 386	2 460	2 380	-80	-6	-3.2	-0.2
Community and social services	3 191	3 821	3 849	27	658	0.7	20.6

Industry	Jul-Sept 2021	Apr-June 2022	Jul-Sept 2022	Qtr.-to-qtr. change	Year-on-year change	Qtr.-to-qtr. change	Year-on-year change
	Thousand					Percentage (%)	
Private households	1 130	1 124	1 088	-36	-42	-3.2	-3.7

\*Note: Total includes "other" industry. Due to rounding, numbers do not necessarily add up to totals.

Source: Stats SA, 2022

**Table 2** shows the employment status in Agriculture per province. Between the second quarter and third quarter of 2022, agricultural employment increased in six of the provinces. The largest employment increase measured in percentages was recorded in the KwaZulu-Natal Province (29.6%), Western Cape (8.4%) and Free States (8.2%), while North West and Limpopo Provinces showed a decrease of 36.8% and 17.8%, respectively. The temporary ban on the export of certain vegetables from South Africa to Botswana and Namibia may be responsible for the decline in employment in these two provinces, particularly in the Limpopo provinces given its proximity to Botswana.

Year-on-year (y-o-y), agricultural employment increased by 43 000 more people employed, translating to a 5.2% increase.

**Table 2: Employment by the province in Agriculture**

Employment by Agriculture per province	Jul-Sept 2021	Apr-June 2022	Jul-Sept 2022	Qtr.-to-qtr. change	Year-on-year change	Qtr.-to-qtr. change	Year-on-year change
	Thousand					Percentage (%)	
<b>Total Agriculture</b>	<b>829</b>	<b>874</b>	<b>873</b>	<b>-1</b>	<b>43</b>	<b>-0.1</b>	<b>5.2</b>
Western Cape	197	187	203	16	6	8.4	2.8
Eastern Cape	107	110	118	7	10	6.7	9.7
Northern Cape	34	35	36	1	2	2.6	6.0
Free State	72	86	93	7	21	8.2	28.6
KwaZulu-Natal	113	91	119	27	5	29.6	4.7
North West	52	54	34	-20	-18	-36.8	-34.5
Gauteng	28	36	38	2	10	4.7	34.4
Mpumalanga	92	104	93	-11	0	-10.5	0.4
Limpopo	133	170	140	-30	7	-17.8	5.4

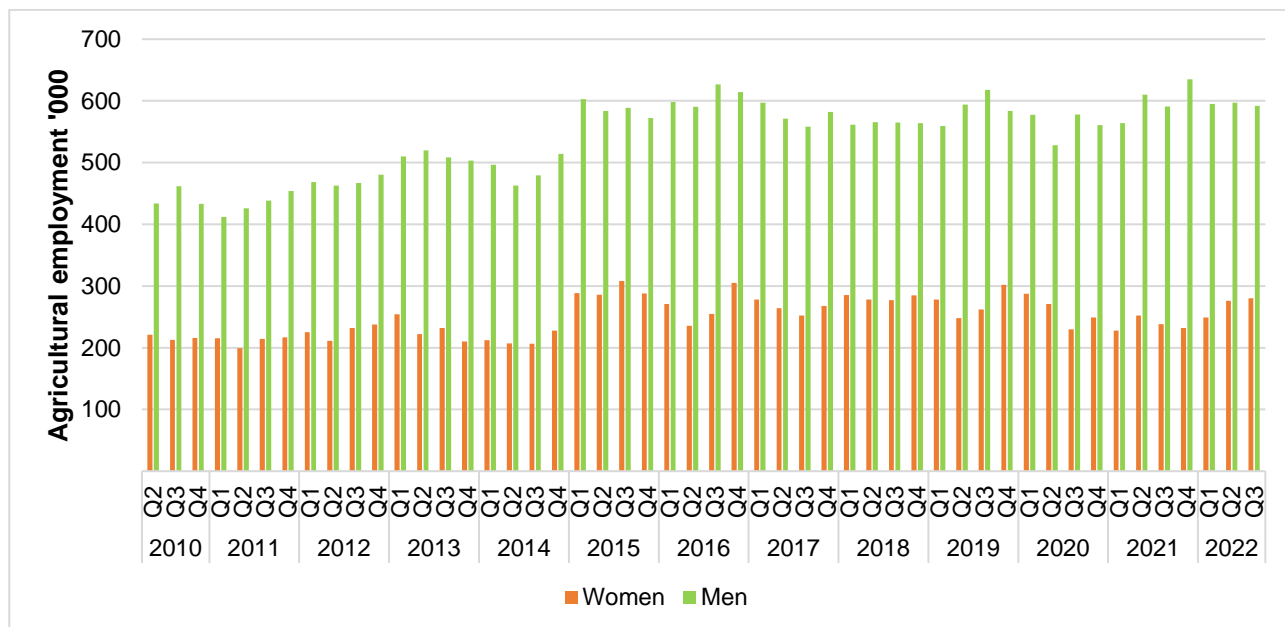
Source: Stats SA, 2022

## 2. Gender Composition of Agricultural Employment

Gender inequality affects access to and control over resources which in turn undermines the sustainable and inclusive development of the Agricultural sector. There is a strong link between food security and gender. According to the United Nation Women's Watch, women play key roles in maintaining all four pillars of food security: as food producers and agricultural entrepreneurs; "gatekeepers" who dedicate their own time, income, and decision-making to maintain the food and nutritional security of their households and communities; and "managers" of the stability of food supplies in times of economic hardship.

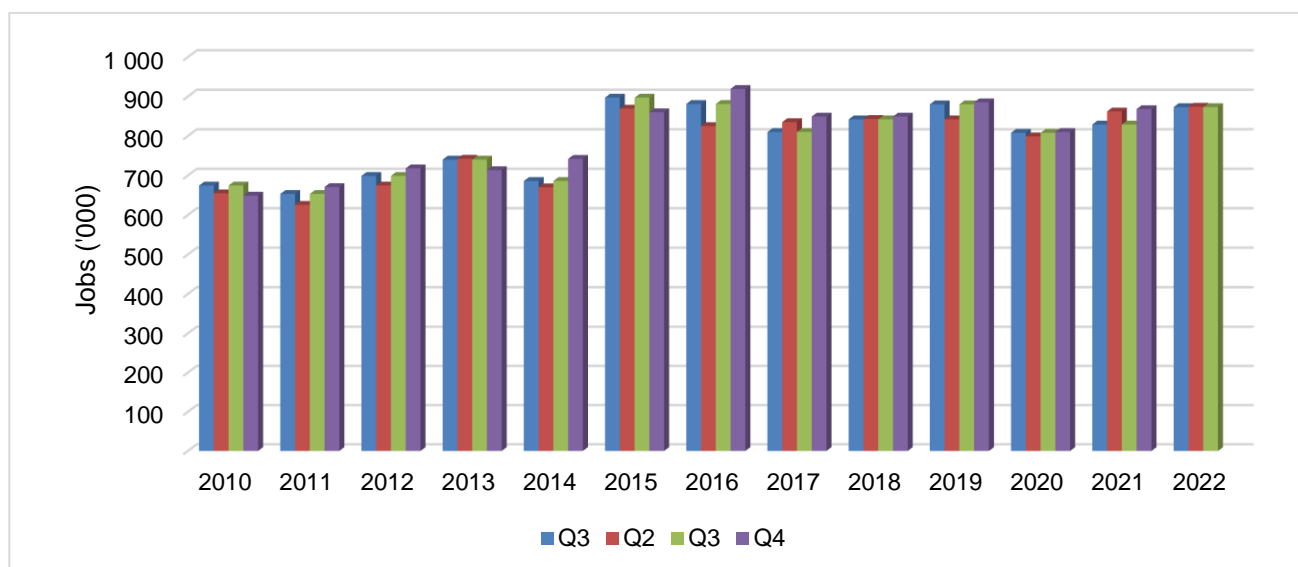
**Figure 1** provides an overview of employment status on gender distribution within the Agricultural sector. Data from Stats SA (2022) shows that men have been the main participants in the agriculture sector from the third quarter of 2010 to the third quarter of 2022. In the third quarter of 2022, the

number of men and women actively involved in Agriculture was 592 000 and 280 000, respectively. The number of women increased by 4 000 (1.4%), while men decreased by 5 000 (0.8%) when compared to the previous quarter. Although the number of women employed in this quarter has increased, gender inequality in Agriculture in South Africa still remains a challenge. An opportunity to emphasise policy discussion and implementation to address transformation issues in the sector is therefore critical.



**Figure 1: Gender distribution in Agriculture**  
Source: Stats SA, 2022

**Figure 2** presents the long-term trends in Agricultural sector employment on a quarterly basis since 2010. Based on **Figure 2**, overall employment increased by 29.5%, from 674 000 to 873 000 jobs, between the second quarter of 2010 and the second quarter of 2022, respectively. The long-term trends illustrate that there is a fluctuation in employment in the agricultural sector between and within each quarter and this might be attributed to the adoption of production technologies and the seasonality of agricultural production.



**Figure 2: Agricultural employment trends**  
Source: Stats SA, 2022



## Conclusion

When compared to the second quarter of 2022, the unemployment rate dropped by 1.0 percentage points in the third quarter of 2022, reaching 32.9%. This decline is not unexpected, especially because a large industry such as finance, which greatly contributes to overall employment across the nation from the banking sub-sector to insurance, also experienced a decline. Although there is a decrease in unemployment this quarter, the high level of unemployment remains a major concern and may potentially have negative effects on economic welfare and deepen poverty in the country. In the third quarter of 2022, South Africa's number of people employed in the agricultural sector was down by 0.1% compared to the second quarter of 2022. It is observed that the third quarter of each year is typically not a busy period for agriculture, however, there were other disruptions that occurred in horticulture and livestock sub-sectors which negatively affected employment.

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