



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 – February 2023*

## EXECUTIVE SUMMARY

The Quarterly Labour Force Survey (QLFS) published by Statistics South Africa on 28 February 2023 provides an overview of the observed changes in the key labour market indicators between the fourth quarter (October - December) of 2022 and the third quarter (July - September) of 2022. The number of employed persons increased 169 000 to 15.9 million in the fourth quarter of 2022, while the number of unemployed persons increased by 28 000 to 7.8 million compared to the third quarter of 2022, resulting in an increase of 197 000 (up by 0.8%) in the number of people in the labour force.

Stats SA (2022) observed that a large number of persons moved from the "not economically active" category to the "employed" and "unemployed" statuses between the third and fourth quarter of 2022, which resulted in a decrease of 0.2 percentage point in the unemployment rate to 32.7%.



Comparing the fourth quarter of 2022 to the fourth quarter of 2021, there was an increase in the overall number of employed individuals across seven of the ten industries. However, the agricultural sector employment decreased by 7 000 (-0.8%), reaching 860 000.

At a provincial level, percentage increase in agricultural employment was recorded in Northern Cape (45.1%), followed by North West (30.4%), Western Cape (9.7%) and KwaZulu-Natal closely at 9.6%. The Eastern Cape, Limpopo, Gauteng, Free State and Mpumalanga provinces, recorded decreases of 24.2%, 23.4%, 12.2%, 3.3% and 1.2%, respectively. Differences in gender employment has also manifested in 0.6% increase in the number of women employed compared to a decrease of 2.4% for men.

## Introduction

The Macroeconomic Digest Labour Report of the fourth 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 28 February 2023.

### 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 fourth quarter (October - December) of 2022 and the third quarter (July - September) of 2022. The number of employed persons increased by 169 000 to 15.9 million in the fourth quarter of 2022, while the number of unemployed persons increased by 28 000 to 7.8 million compared to the third quarter of 2022, resulting in an increase of 197 000 (up by 0.8%) in the number of people in the labour force. Stats SA (2022) observed that a large number of persons moved from the "not economically active" category to the "employed" and "unemployed" statuses between the third and fourth quarter of 2022, which resulted in a decrease of 0.2 percentage point in the unemployment rate to 32.7%.

**Table 1** shows employment by industry between the third quarter of 2022 and the fourth quarter of 2022. Seven out of the 10 industries had an increase in the number of employed people. The largest increase in employment was recorded in the Finance (103 000), Private households (54 000), Trade (52 000) and Transport (43 000). Mining and manufacturing registered employment increases of 30 000 and 26 000, respectively for the same period. By contrast, the number of jobs in Community and social services declined by 122 000, while the number of jobs in the Agricultural sector declined by 12 000. The decline in the agricultural employment was in all subsectors but especially in the livestock sector. This could be linked to the animal disease challenge, partly to load shedding which has been intensifying in recent months, especially in the poultry and dairy sectors.

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

Industry	Oct-Dec 2021	Jul-Sept 2022	Oct-Dec 2022	Qtr.-to-qtr. change	Year-on-year change	Qtr.-to-qtr. change	Year-on-year change
	Thousand				Percentage (%)		
<b>Total*</b>	<b>14 544</b>	<b>15 765</b>	<b>15 934</b>	<b>169</b>	<b>1 390</b>	<b>1.1</b>	<b>9.6</b>
Agriculture	868	873	860	-12	-7	-1.4	-0.8
Mining	370	407	436	30	66	7.3	17.9
Manufacturing	1 316	1 630	1 656	26	340	1.6	25.8
Utilities	82	116	124	8	43	6.6	52.2
Constructing	1 133	1 223	1 212	-12	79	-0.9	7.0
Trade	2 896	3 245	3 297	52	402	1.6	13.9
Transport	951	939	982	43	32	4.6	3.3
Finance	2 404	2 380	2 484	103	79	4.3	3.3
Community and social services	3 264	3 849	3 727	-122	462	-3.2	14.2
Private households	1 258	1 088	1 142	54	-117	5.0	-9.3

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

Source: Stats SA, 2023

**Table 2** shows the employment status in Agriculture per province. Four provinces recorded an increase in agricultural employment while five recorded decreases between the third and fourth quarters of 2022. The agricultural sector employment had decreased by 12 000 (-1.4%) during the fourth quarter of 2022, reaching 860 000. By province the largest employment increase in percentage terms was recorded in the Northern Cape (45.1%), followed by North West (30.4%), Western Cape (9.7%) and KwaZulu-Natal closely at 9.6%. The Eastern Cape, Limpopo, Gauteng, Free State and Mpumalanga provinces, recorded decreases of 24.2%, 23.4%, 12.2%, 3.3% and 1.2%, respectively. The agricultural sector is one of the sectors that is highly susceptible to electricity disruptions. In the short-to-medium term the ongoing load shedding is likely to cause disruption in farm operations with the likelihood of its impact on employment levels.

Year-on-year (y-o-y), agricultural employment decreased by 7 000 less people employed, translating to a 0.8% decrease.

**Table 2: Agricultural employment by province**

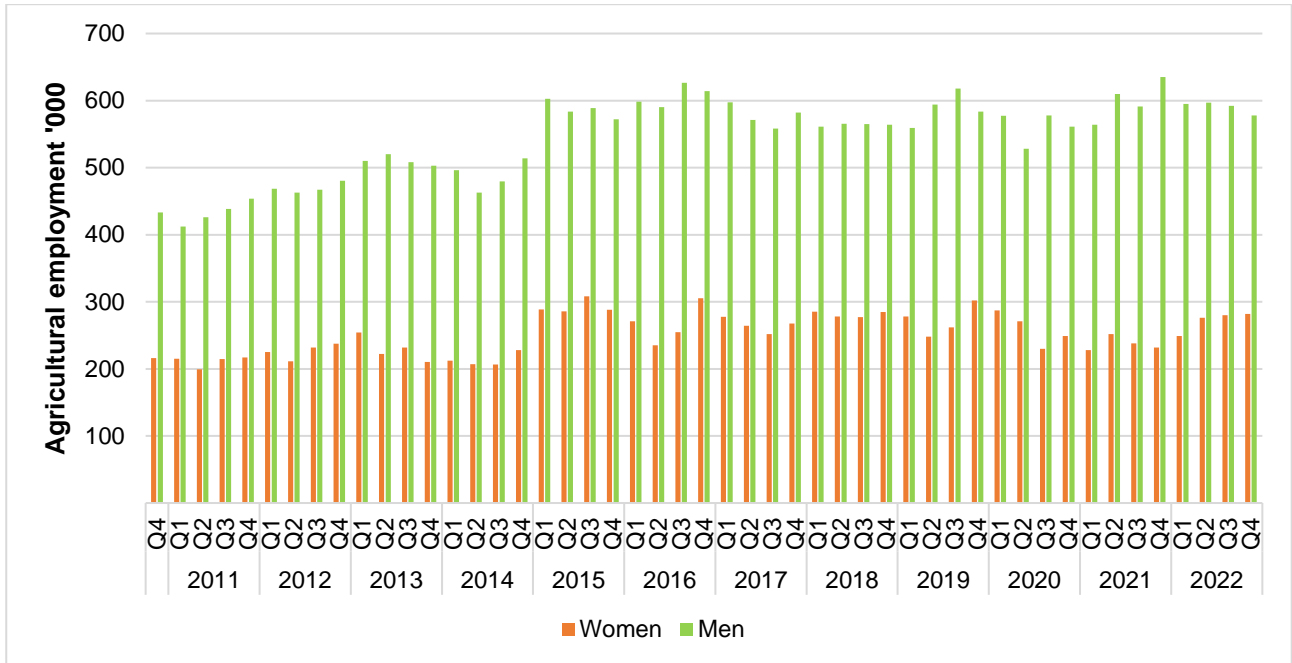
Employment by Agriculture per province	Oct-Dec 2021	Jul-Sept 2022	Oct-Dec 2022	Qtr.-to-qtr. change	Year-on-year change	Qtr.-to-qtr. change	Year-on-year change
	Thousand					Percentage (%)	
<b>Total Agriculture</b>	<b>868</b>	<b>873</b>	<b>860</b>	<b>-12</b>	<b>-7</b>	<b>-1.4</b>	<b>-0.8</b>
Western Cape	178	203	223	20	45	9.7	25.2
Eastern Cape	108	118	89	-28	-19	-24.2	-17.7
Northern Cape	41	36	52	16	11	45.1	27.3
Free State	66	93	90	-3	24	-3.3	35.8
KwaZulu-Natal	132	119	130	11	-3	9.6	-1.9
North West	71	34	44	10	-26	30.4	-37.0
Gauteng	41	38	33	-5	-8	-12.2	-19.4
Mpumalanga	106	93	92	-1	-14	-1.2	-13.3
Limpopo	124	140	107	-33	-17	-23.4	-13.7

Source: Stats SA, 2023

## 2. Gender Composition of Agricultural Employment

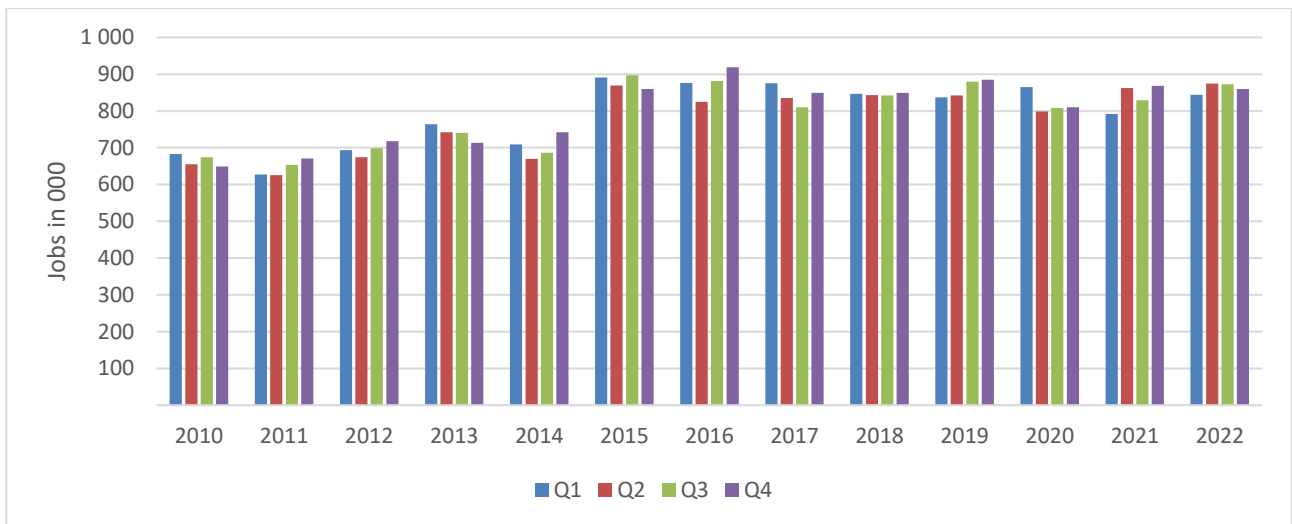
Gender inequality hinders the sustainable and inclusive growth of the agricultural industry by affecting access to and control over resources. Broadly, food production, hence food security and gender are strongly correlated. As food producers and agricultural entrepreneurs, who invest their own time, money, and decision-making to maintain the food and nutritional security of their households and communities, and "managers" of the stability of food supplies in hard times, women play critical roles in upholding all four pillars of food security, according to the United Nations Women's Watch.

**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 fourth quarter of 2010 to the fourth quarter of 2022. In the fourth quarter of 2022, the number of men and women actively involved in Agriculture was 578 000 and 282 000, respectively. The trend observed in the fourth quarter has continued from the third quarter as observed in figure 1. Yet, the overall gender gap in the agriculture industry continues to remain a concern despite a slight increase in women's involvement. The number of women increased by 2 000 (0.6%), while men decreased by 14 000 (-2.4%) when compared to the previous quarter.



**Figure 1: Gender distribution in Agriculture**  
Source: Stats SA, 2023

**Figure 2** presents the long-term trends in Agricultural sector employment on a quarterly basis since 2010. Agricultural employment has increased significantly over the long-term trends, but mechanization has the potential to slow it down, especially on commercial farms. Another crucial factor that must be considered when determining the sector's overall employment numbers is seasonality, as differing levels of farm produce necessitate more labour. As observed in **Figure 2** overall employment increased by 32.5%, from 649 000 to 860 000 jobs, between the fourth quarter of 2010 and the fourth quarter of 2022, respectively.



**Figure 2: Agricultural employment trends**  
Source: Stats SA, 2023

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