



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 2023*

## EXECUTIVE SUMMARY

The Quarterly Labour Force Survey (QLFS) published by Stats SA provides an overview of the observed changes in key labour market indicators between the third quarter (July - September) and the second quarter (April - June) of 2023. The number of employed persons increased by 399 000 to 16.7 million in the third quarter of 2023, while the number of unemployed persons decreased by 72 000 to 7.8 million compared to the second quarter of 2023, resulting in a decrease of about 326 000 (1.3%) in the number of people in the labour force.

Stats SA (2023) observed that a number of persons moved from the "*not economically active*" and "*unemployed*" statuses to the "*employed*" category between the third quarter and the second quarter of 2023, resulting in a decrease of 0.7 percentage points in the unemployment rate to 31.9%.



Comparing the third quarter of 2023 to the second quarter of 2023, there was an increase in the overall number of employed individuals across six of the ten industries. Respectively, employment in the agricultural sector increased by 61 000 (6.9%) on a quarter-on-quarter (q/q) basis, reaching 956 000 of employed people.

By province, the largest increase in agricultural employment in percentage terms was recorded in Northern Cape and Gauteng, both at (38%), followed by North West (31%), Western Cape (19%), Eastern Cape (13%) and KwaZulu-Natal with the least increase of 1%. Mpumalanga, Free State, and Limpopo provinces recorded decreases of 14%, 9% and 7%, respectively. During the third quarter of 2023, the number of women employed in agriculture increased by 20 000 (7.3%), while the number of men increased by 41 000 (6.7%) when compared to the previous quarter.

## Introduction

The Macroeconomic Digest Labour Report of the third quarter of 2023 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 14 November 2023. The Stats SA report can be accessed online:

<https://www.statssa.gov.za/publications/P0211/P02113rdQuarter2023.pdf>

### 1. Employment by Industry

The Quarterly Labour Force Survey (QLFS) published by Stats SA provides an overview of the observed changes in key labour market indicators between the third quarter (July - September) and the second quarter (April - June) of 2023. The number of employed persons increased by 399 000 to 16.7 million in the third quarter of 2023, while the number of unemployed persons decreased by 72 000 to 7.8 million compared to the second quarter of 2023, resulting in an increase of 326 000 (1.3%) in the number of people in the labour force. Stats SA (2023) observed that a number of persons moved from the "not economically active" and "unemployed" statuses to the "employed" category between the third quarter and the second quarter of 2023, resulting in a decrease of 0.7 percentage points in the unemployment rate to 31.9%.

**Table 1** shows employment by industry between the third and second quarter of 2023. Six out of the ten industries had an increase in the number of employed persons. The largest increase in employment was recorded in finance (237 000), followed by community and social services (119 000), agriculture (61 000), construction (53 000), trade (29 000) and private households (22 000). Employment in the manufacturing, mining, transport and utilities industries decreased by 50 000, 35 000, 20 000 and 16 000 persons, respectively.

The rise in employment within the agricultural sector may be attributed to preparations for the start of South Africa's 2023/24 summer crop planting season. Even though there is still uncertainty regarding the intensity of El Niño, the South African Weather Services (SAWS) provided optimistic rainfall predictions for specific regions in the country from September to October.

**Table 1: Quarterly employment, quarter-to-quarter and year-on-year changes**

Industry	Apr-Jun 2022	Jan-Mar 2023	Apr-Jun 2023	Qtr.-to-qtr. change	Year-on-year change	Qtr.-to-qtr.	Year-on-year change
	Thousand					Percentage (%)	
Total*	15 765	16 346	16 745	399	979	2.4%	6.2%
Agriculture	873	894	956	61	83	6.8%	9.5%
Mining	407	444	409	-35	2	-7.8%	0.5%
Manufacturing	1 630	1 558	1 508	-50	-123	-3.2%	-7.5%
Utilities	116	129	113	-16	-3	-12.5%	-2.9%
Construction	1 223	1 304	1 357	53	134	4.1%	11.0%
Trade	3 245	3 361	3 390	29	145	0.9%	4.5%
Transport	939	986	966	-20	27	-2.0%	2.9%
Finance	2 380	2 599	2 836	237	456	9.1%	19.1%

Industry	Apr-Jun 2022	Jan-Mar 2023	Apr-Jun 2023	Qtr.-to-qtr. change	Year-on-year change	Qtr.-to-qtr.	Year-on-year change
	Thousand					Percentage (%)	
Community and social services	3 849	3 965	4 084	119	235	3.0%	6.1%
Private households	1 088	1 093	1 116	22	28	2.0%	2.6%

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

Source: Stats SA, 2023

**Table 2** illustrates the employment trends in agriculture per province. Six provinces recorded an increase in employment in the agricultural sector, while three recorded a decrease between the third quarter of 2023 and the second quarter of 2023. By province, the largest increase in agricultural employment in percentage terms was recorded in Northern Cape at (38.9%), followed by Gauteng (36.4%), North West (32.3%), Western Cape (18.8%), Eastern Cape (12.9%) and KwaZulu-Natal with the least increase of 1.0%. During the period under review, several locations in South Africa received favourable climatic conditions which might have increased labour demand for activities such as planting seasonal crops and, in some cases, harvesting. However, Mpumalanga, Free State and Limpopo provinces recorded decreases of 13.7%, 9.2%, and 7.2%, respectively.

Difficulties, such as safety regulations related to cold treatment in the European Union (EU) faced by the citrus industry, one of the largest industries within the fruit subsector present a serious threat to this year's overall employment. The ongoing electricity cuts present a persisting threat to the overall horticultural industry as most of its products are produced under irrigation. On the other hand, year-on-year (y-o-y) agricultural employment increased by 83 000 people employed, translating to a 9.5% increase.

**Table 2: Agricultural employment by province**

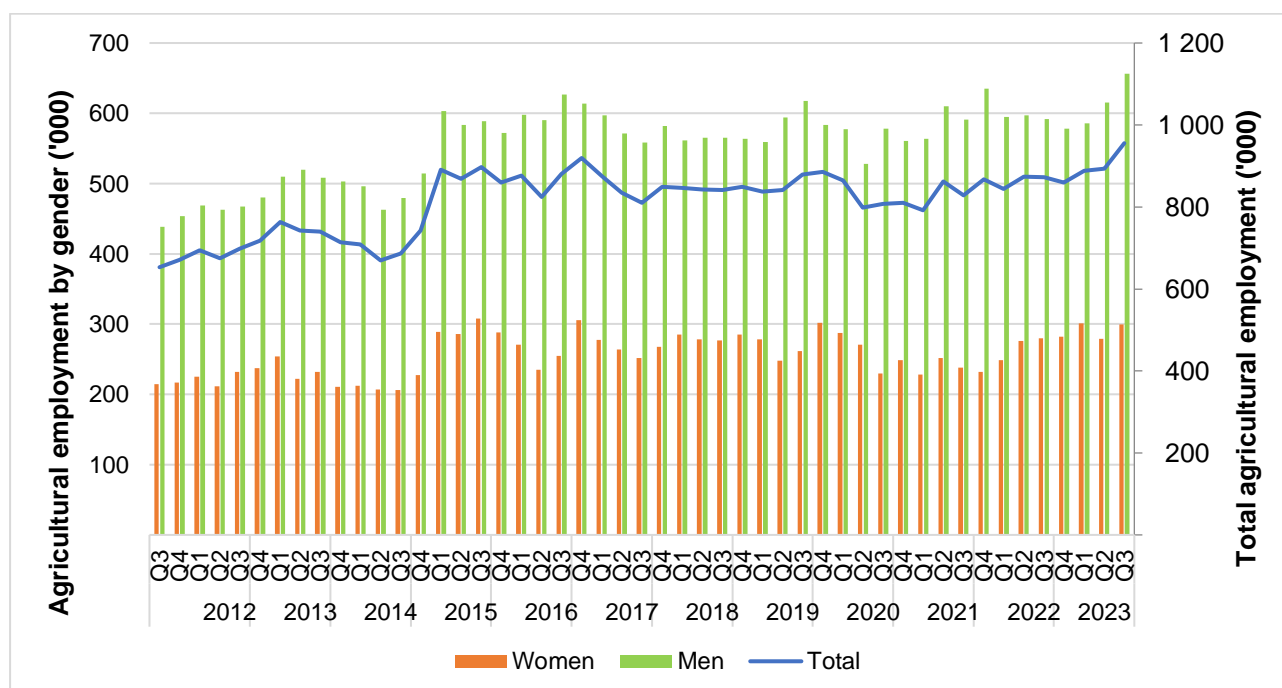
Employment by Agriculture per province	Jul-Sep 2022	Apr-June 2023	Jul-Sep 2023	Qtr.-to-qtr. Change	Year-on-year change	Qtr.-to-qtr. change	Year-on-year change
	Thousand					Percentage (%)	
<b>Total Agriculture</b>	<b>873</b>	<b>894</b>	<b>956</b>	<b>61</b>	<b>83</b>	<b>6.8%</b>	<b>9.5%</b>
Western Cape	203	200	238	38	35	18.8%	17.3%
Eastern Cape	118	121	136	16	19	12.9%	15.9%
Northern Cape	36	38	52	15	17	38.9%	46.6%
Free State	93	71	65	-7	-28	-9.2%	-30.5%
KwaZulu-Natal	119	148	150	1	31	1.0%	26.3%
North West	34	39	51	12	17	32.3%	49.8%
Gauteng	38	28	39	10	1	36.4%	2.2%
Mpumalanga	93	101	87	-14	-6	-13.7%	-6.4%
Limpopo	140	149	138	-11	-2	-7.2%	-1.4%

Source: Stats SA, 2023

## 2. Gender Composition of Employment in the Agricultural Sector

By affecting access to and control over resources, gender inequality limits the agricultural sector from growing in a way that is both sustainable and inclusive. According to the United Nations Women's Watch, women play crucial roles in upholding all the four pillars of food security 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.

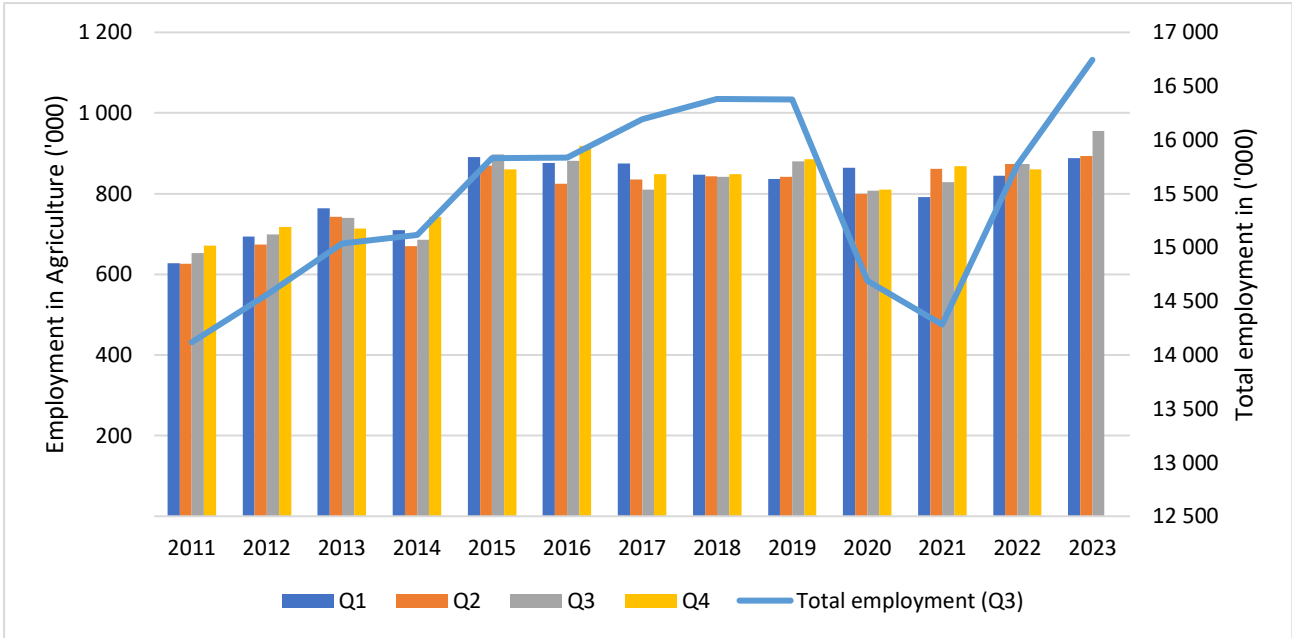
**Figure 1** provides an overview of the employment situation and gender distribution in the agricultural sector. Data from Stats SA (2023) shows that men have been the primary participants in the agriculture sector from the third quarter of 2011 to the third quarter of 2023. In the third quarter of 2023, the number of men and women actively involved in agriculture was 656 000 and 299 000, respectively. During the third quarter of 2023, the number of women increased by 20 000 (7.2%), while the number of men increased by 41 000 (6.7%) compared to the previous quarter. When combining both genders, the number of people employed in agriculture increased by 61 000 (6.8%) for the respective analysis.



**Figure 1: Employment by gender distribution in agriculture**

Source: Stats SA, 2023

**Figure 2** illustrates the long-term trends of employment in the agricultural sector on a quarterly basis since 2011. Long-term trends reveal a substantial increase in employment in agriculture. However, the periods when agricultural employment declines, as observed in **Figure 2** can be attributed to seasonal employment, as farmers tend to hire more workers during specific periods of a particular marketing season. On a long-term basis, employment increased by 46.3%, from 653 000 jobs in the third quarter of 2011 to 956 000 in the third quarter of 2023. When comparing agricultural employment to overall employment in South Africa, agriculture employs about 16.3% of the employed pool, making the sector essential in the employment of South African citizens.



**Figure 2: Employment trends in the agricultural sector**

Source: Stats SA, 2023

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