



**destea**

department of  
economic, small business development,  
tourism and environmental affairs  
FREE STATE PROVINCE

## **[An Economic Intelligence Report]**

**[Manufacturing: For  
higher productivity and  
growth]**

**[March 2017]**

[The Manufacturing sector is one of the prioritised sectors in the Free State economic environment. Currently, the overall growth in the manufacturing industry in the province is closely linked to the fuel, petroleum and chemical sub-sector. Emphasis thus will be on the economic contribution of manufacturing in relation to the contribution of the other sectors such as agriculture, mining, electricity, construction, trade, transport, finance and community & social services. The goal is to highlight the current contribution of manufacturing and project how long-term trends will shape manufacturing in future.]

This report therefore provides an overview of the current economic performance of manufacturing and its contribution to the provincial economy.]

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The issue of the *Economic Intelligence Report* focuses mainly on the three months quarter ending *March 2017*.

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## 1. Introduction

This edition of the Economic Intelligence Report gives an overview of the manufacturing sector and its contribution to the provincial economy. It is regarded as one of the prioritised sectors as per the Free State Growth and Development Strategy (FSGDS), as well as the Draft Provincial Economic Development Strategy Framework (PEDS).

Manufacturing plays a key role globally, nationally as well as in the Free State province. Manufacturing industries have helped drive economic growth and rising living standards for nearly three centuries and continue to do so in developing economies. Building a manufacturing sector is still a necessary step in national development, raising incomes and providing the machinery, tools, and materials to build modern infrastructure and housing.<sup>1</sup>

Emphasis will also be placed on the contribution of manufacturing to the national economic environment, as well as the performance of manufacturing in the provincial economic landscape. In advanced economies, manufactured goods stand as the tangible expression of innovation and competitiveness. Furthermore, manufacturing can be regarded as the route to higher productivity and rising living standards for developing economies.

Manufacturing plays an important role in the transition from an economy based on primary agriculture to the one characterised by high value added products. The global economy is facing serious challenges that are in turn affecting the manufacturing sector. This negative global economic environment subsequently has an effect on the ability of the economy to create jobs. This report therefore will also include an analysis on the employment in this sector and subsequent new era of innovation and opportunities.

Information was collected by using data from IHS Global Insight and several publications from Statistics South Africa, namely Gross Domestic Product (GDP), the Quarterly Labour Force Survey (QLFS) and others.

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<sup>1</sup> McKinsey Global Institute (MGI), Manufacturing the future: The next era of global growth and innovation

## 2. Economic Overview

### 2.1 Gross Domestic Product per Region (GDP-R)

Before zooming into the sectoral performance of the Free State economy, with a special focus on the manufacturing sector, it is important to start with an overview of the Free State economy as a whole.

In 2015 the Free State Province had a total GDP of R 196 billion in 2015 (up from R 85.5 billion in 2005) in current prices. The province as depicted in *table 1* below contributed 4.88% to the South Africa GDP of R 4.01 trillion in 2015 increasing in the share of the National Total from 5.21% in 2005.<sup>2</sup>

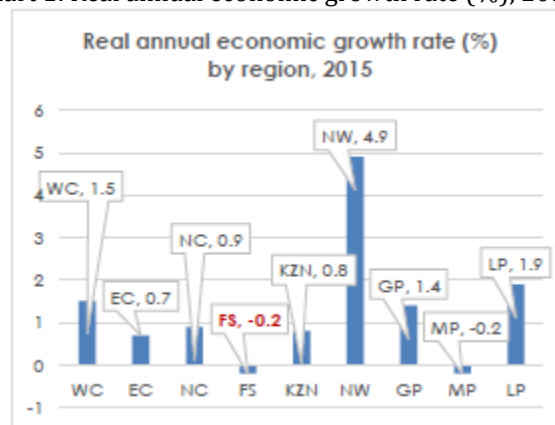
Table 1: Gross Domestic Product (GDP) - Free State and National Total, 2005-2015  
[R Billions, Current Prices]

	Free State	National Total	Free State as % of national
2005	85.5	1,639.3	5.2%
2006	101.2	1,839.4	5.5%
2007	114.0	2,109.5	5.4%
2008	129.7	2,369.1	5.5%
2009	135.9	2,507.7	5.4%
2010	147.2	2,748.0	5.4%
2011	157.6	3,023.7	5.2%
2012	163.9	3,254.0	5.0%
2013	179.1	3,549.2	5.0%
2014	189.2	3,812.6	5.0%
2015	195.9	4,013.6	4.9%

Source: IHS Global Insight Regional Explorer version 1046

The lowest annual economic growth rate as measured by Gross Domestic Product by Region at market prices for 2015 as per *chart 1* were recorded in Free State and Mpumalanga (-0,2%), while the highest was recorded in North West (4.9%).<sup>3</sup>

Chart 1: Real annual economic growth rate (%), 2015



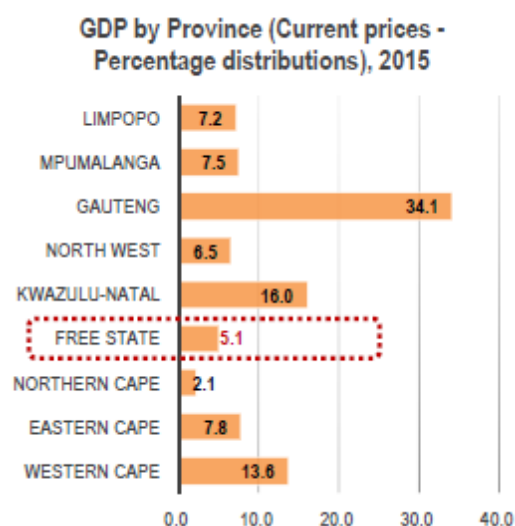
Source: Stats SA, Free State Fact Sheet, GDP (Q4, 2016)

<sup>2</sup>IHS Global Insight Regional Explorer version 1046, p15

<sup>3</sup>Statistics SA, Free State Fact Sheet, GDP (Q4, 2016)

When looking at the respective provinces, the highest GDP by province at current prices for 2015 was recorded in Gauteng (34.1%), followed by KwaZulu-Natal (16.0%) and Western Cape (13.6%) as indicated in the *chart 2* below. Northern Cape recorded the lowest (2.1%), followed by the Free State with 5.1%.

Chart 2: Gross Domestic Product by province, 2015



Source: Stats SA, Free State Factsheet, GDP, (Q4: 2016)

When looking at the industries, the highest contributors to the Free State GDP in 2015 at current prices were general government services at 15.4%, as per *table 2* below, followed by finance at 14.9% and trade industries at 12.7%. Manufacturing contributed 10.2% to the GDP of the province, which is very encouraging taking into account that it registered an increase of 1 percentage point compared to its contribution in 2012.

Table 2: GDPR by activity, percentage of current prices: Free State, 2012 – 2015

Industry	2012	2013	2014	2015
<b>Primary Industries</b>	<b>16.2</b>	<b>15.7</b>	<b>15.1</b>	<b>13.2</b>
Agriculture, forestry and fishing	4.1	4.1	4.3	4.1
Mining and quarrying	12.0	11.7	10.8	9.1
<b>Secondary Industries</b>	<b>15.2</b>	<b>15.2</b>	<b>15.2</b>	<b>16.7</b>
Manufacturing	9.2	9.2	9.0	10.2
Electricity, gas and water	3.5	3.3	3.6	4.2
Construction	2.5	2.6	2.5	2.4
<b>Tertiary Industries</b>	<b>58.6</b>	<b>58.6</b>	<b>59.2</b>	<b>59.6</b>
Trade, catering and accommodation	13.9	13.3	12.9	12.7
Transport, storage and communication	8.9	9.0	9.5	9.5
Finance, real estate and business services	13.5	13.7	14.3	14.9
Personal services	7.3	7.2	7.0	7.1
General government services	15.0	15.3	15.5	15.4
<b>All industries at basic prices</b>	<b>90.1</b>	<b>89.6</b>	<b>89.4</b>	<b>89.5</b>
Taxes less subsidies on products	9.9	10.4	10.6	10.5
<b>GDPR at market prices</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Stats SA, GDP (Q4, 2016)

## 2.2 Gross Value Added by Region (GVA-R)

The Free State Province's economy is made up of various industries as per *table 3*. The GVA-R variable provides a sector break-down, where each sector is measured in terms of its value addition in the local economy. The manufacturing sector is but one of nine sectors that are contributing to the GVA<sup>4</sup> of the province.

The summary as per *table 3* below puts the Gross Value Added (GVA) of National in relation to that of the Free State Province in 2015 in current prices.

*Table 3: GVA by Broad Economic Sector - Free State, 2015 [R Billions, Current Prices]*

Sector	Free State	National Total	Free State as % of national
Agriculture	8.4	85.1	9.8%
Mining	20.4	286.0	7.1%
Manufacturing	17.6	474.5	3.7%
Electricity	7.3	131.6	5.6%
Construction	4.9	145.3	3.3%
Trade	25.5	539.0	4.7%
Transport	18.6	368.0	5.1%
Finance	26.8	739.1	3.6%
Community services	45.1	821.2	5.5%
Total Industries	174.6	3,589.8	4.9%

*Source: IHS Global Insight Regional eXplorer version 1046*

In 2015, the community services sector was the largest within Free State Province accounting for R 45.1 billion or 25.8% of the total GVA in the province's economy. The sector that contributed the second most to the GVA of the Free State Province was the finance sector at 15.4%, followed by the trade sector with 14.6%. The sector that contributed the least to the economy of Free State Province was the construction sector with a contribution of R 4.87 billion or 2.79% of the total GVA.<sup>5</sup>

The manufacturing sector contributed 17.6 billion or 10.08% to the GVA of the Free State Province.

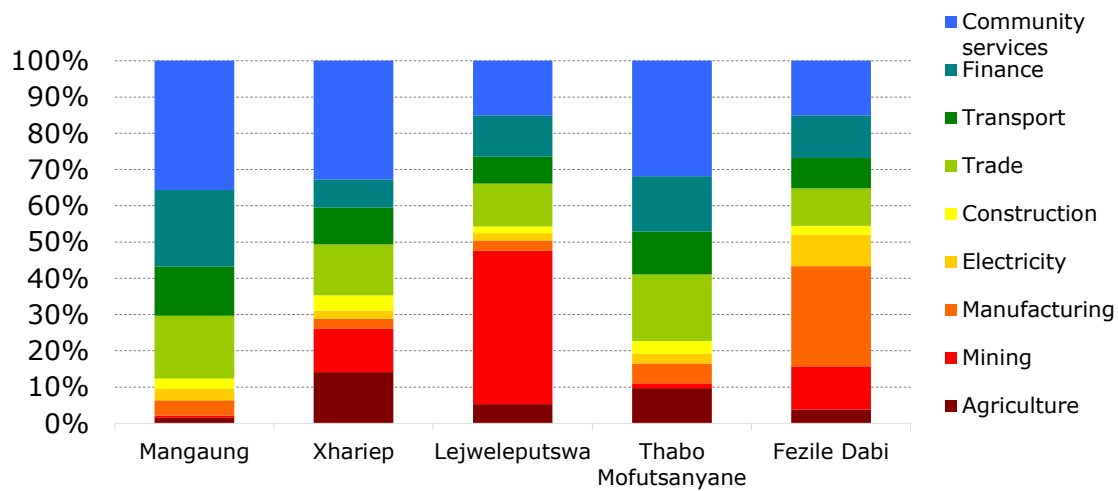
The community sector, as per *chart 3* below, which includes the government services, is generally a large contributor towards GVA in smaller and more rural local municipalities.

<sup>4</sup>Gross Value Added (GVA) is defined as a measure of output (total production) of a region in terms of the value that was created within that region. GVA can be broken down into various production sectors.

<sup>5</sup>Global Insight Regional eXplorer version1046, p. 19

When looking at the regions within Free State Province it is clear the manufacturing sector within the Fezile Dabi District municipality contributed the highest (27.6%)<sup>6</sup> towards its own GVA, as well as the highest if compared to the contribution of the manufacturing sectors in the Mangaung Metro and the four district municipalities (see *chart 3* below). The Mangaung metropolitan municipality contributed R 59.1 billion or 33.87% to the GVA of Free State Province, making it the largest metropolitan municipality in terms of its contribution to the overall GVA of Free State Province.

*Chart 3: Gross VALUE Added (GVA) by Broad Economic Sector – Metro & District Municipalities of Free State Province, 2015 [Percentage Composition]*



Source: IHS Global Insight Regional eXplorer version 1046

### 2.3 Economic Performance of sectors

The GVA in the construction sector, between 2005 and 2015, had the highest average annual growth rate in Free State at 4.31% as per *table 4* below. The industry with the second highest average annual growth rate is the finance sector averaging at 2.85% per year. The electricity sector had an average annual growth rate of 0.08%, while the mining sector had the lowest average annual growth of 0.94%.<sup>7</sup> Overall a positive growth existed for all the industries in 2015 with an annual growth rate of 0.41% since 2014.

<sup>6</sup> IHS Global Insight Regional eXplorer version 1029, see also Annexure 1

<sup>7</sup> IHS Global Insight Regional eXplorer version 1046, p21



The manufacturing sector recorded an average annual growth rate of 1.53%, which is higher than that of the primary industries, as well as the electricity sector. It should be noted that the growth and increasing sophistication and specialisation of manufacturing may generate increased demand for service inputs into manufacturing. Accordingly, the growth of services as a result and their increasing share in the composition of the economy should not be interpreted as services “replacing manufacturing as it is associated with an increased demand arising from manufacturing itself”.<sup>8</sup>

*Table 4: Gross Value Added (GVA) by Broad Economic Sector - Free State Province, 2005, 2010 and 2015 [R billions, 2010 Constant Prices]*

	2005	2010	2015	Average Annual growth
<b>Agriculture</b>	5.8	6.7	6.4	<b>0.92%</b>
<b>Mining</b>	22.2	18.9	20.2	<b>-0.94%</b>
<b>Manufacturing</b>	13.1	14.6	15.3	<b>1.53%</b>
<b>Electricity</b>	4.5	4.5	4.5	<b>0.08%</b>
<b>Construction</b>	2.7	3.8	4.2	<b>4.31%</b>
<b>Trade</b>	20.1	22.6	26.0	<b>2.58%</b>
<b>Transport</b>	10.1	11.6	12.6	<b>2.24%</b>
<b>Finance</b>	17.0	20.5	22.5	<b>2.85%</b>
<b>Community services</b>	26.0	30.5	34.3	<b>2.80%</b>
<b>Total Industries</b>	121.6	133.6	145.9	<b>1.84%</b>

*Source: IHS Global Insight Regional eXplorer version 1046*

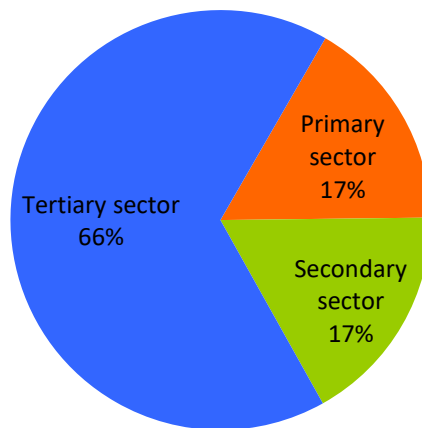
The tertiary sector, as per chart 4 below, contributes the most to the GVA within the Free State Province at 66.4%. This sector consists of four broad economic sectors namely the trade, transport, finance and the community services sector. This is slightly lower than the national economy (68.7%). The secondary sector contributed a total of 17.1% (ranking second) and consists of three broad economic sectors namely manufacturing, electricity and the construction. Agriculture and mining sectors, which constitute the primary sector, contributed the least at 16.5%.<sup>9</sup>

<sup>8</sup>Tregenna, F. 2007. Which sectors can be engines of growth and employment in South Africa? An analysis of manufacturing and services. Faculty of Economics, University of Cambridge.

<sup>9</sup>IHS Global Insight Regional eXplorer version 1046, p22

Chart 4: Gross Value Added (GVA) by aggregate economic sector

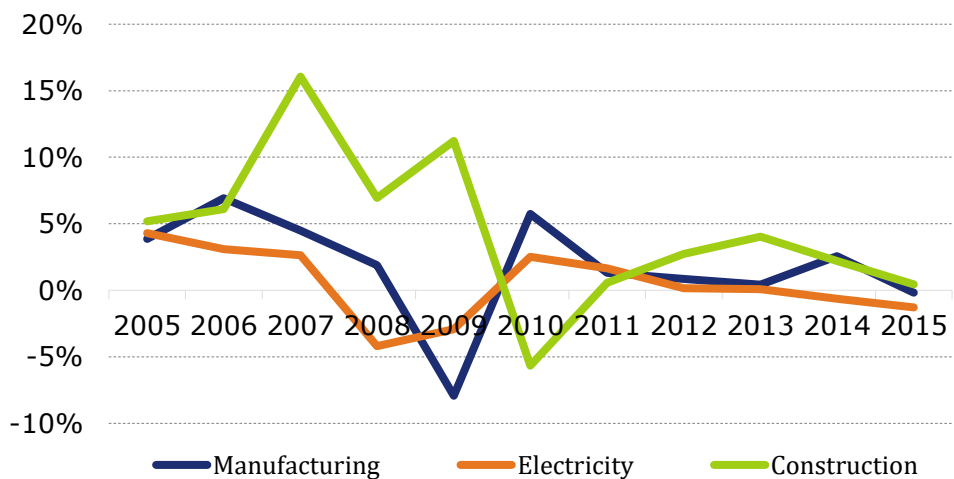
Free State, 2015



Source: IHS Global Insight Regional eXplorer version 1046

Chart 5 below represents the average growth rates in the GVA for the secondary sector (that consist of manufacturing, electricity and construction) in Free State Province from 2005 to 2015.

Chart 5: Gross value added (GVA) by secondary sector  
Free State, 2005-2015

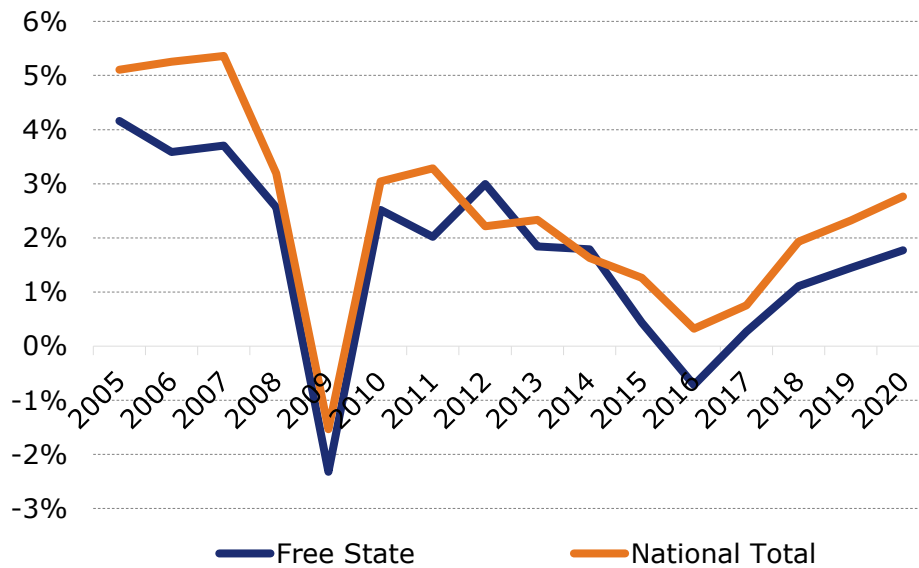


Source: IHS Global Insight Regional eXplorer version 1046

## 2.4 Economic Growth Forecast

It is expected that Free State Province's GDP will grow at an average annual rate of 0.77% from 2015 to 2020 as per *chart 6* below. South Africa as a whole is forecasted to grow at an average annual growth rate of 1.61%, which is higher than that of the Free State Province.<sup>10</sup>

*Chart 6: Gross Domestic Product (GDP) - Free State and National Total, 2005-2020  
[Average Annual Growth Rate, Constant 2010 Prices]*



Source: IHS Global Insight Regional eXplorer version 1046

In 2020, Free State's forecasted GDP will be an estimated R 167 billion (constant 2010 prices) or 5.1% of the total GDP of South Africa. The ranking in terms of size of the Free State Province will remain the same between 2015 and 2020, with a contribution to the South Africa GDP of 5.1% in 2020 compared to the 5.3% in 2015. At a 0.77% average annual GDP growth rate between 2015 and 2020, Free State ranked the eighth compared to the other regional economies.<sup>11</sup>

Looking at the *gross value added (GVA) by broad economic sector*, it is expected that manufacturing as per *table 5* below is to grow at an average 0.98% annually from R 15.3 billion in 2015 to R 16.1 billion in 2020 in Free State Province.

<sup>10</sup>IHS Global Insight Regional eXplorer version 1046, p.18

<sup>11</sup>IHS Global Insight Regional eXplorer version 1046, p.18

Table 5: Gross value added (GVA) by broad economic sector - Free State Province, 2015-2020 [R billions, constant 2010 prices]

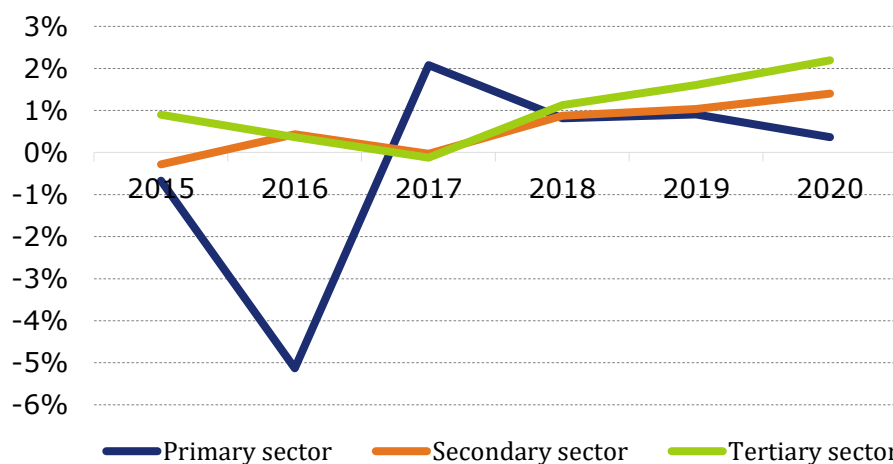
	2015	2016	2017	2018	2019	2020	Average Annual Growth
Agriculture	6.4	5.9	6.0	6.0	6.0	6.2	-0.77%
Mining	20.2	19.3	19.8	20.0	20.2	20.2	-0.06%
Manufacturing	15.3	15.5	15.5	15.7	15.8	16.1	0.98%
Electricity	4.5	4.4	4.4	4.5	4.6	4.7	0.86%
Construction	4.2	4.1	4.1	4.1	4.1	4.1	-0.29%
Trade	26.0	25.8	25.7	26.0	26.2	26.7	0.53%
Transport	12.6	12.5	12.5	12.8	13.0	13.4	1.27%
Finance	22.5	22.6	22.7	23.1	23.6	24.2	1.50%
Community Services	34.3	34.8	34.7	34.8	35.3	36.1	1.01%
Total Industries	145.9	145.0	145.4	146.9	148.9	151.5	0.76%

Source: IHS Global Insight Regional eXplorer version 1046

The finance sector is expected to grow fastest at an average of 1.50% annually from R 22.5 billion in Free State Province to R 24.2 billion in 2020. The community services sector is estimated to be the largest sector within the Free State Province in 2020, with a total share of 23.8% of the total GVA (as measured in current prices), growing at an average annual rate of 1.0%. The sector that is estimated to grow the slowest is the agriculture sector with an average annual growth rate of -0.77%.<sup>12</sup>

It is furthermore expected that the Primary sector is to grow at an average annual rate of -0.23% between 2015 and 2020, as per chart 7 below. The Secondary sector is to grow at 0.74% on average annually, whilst the Tertiary sector is expected to grow at an average annual rate of 1.03% for the same period.

Chart 7: Gross Value Added (GVA) by aggregate Economic Sector - Free State Province, 2015-2020 [Annual Growth Rate, Constant 2010 Prices]

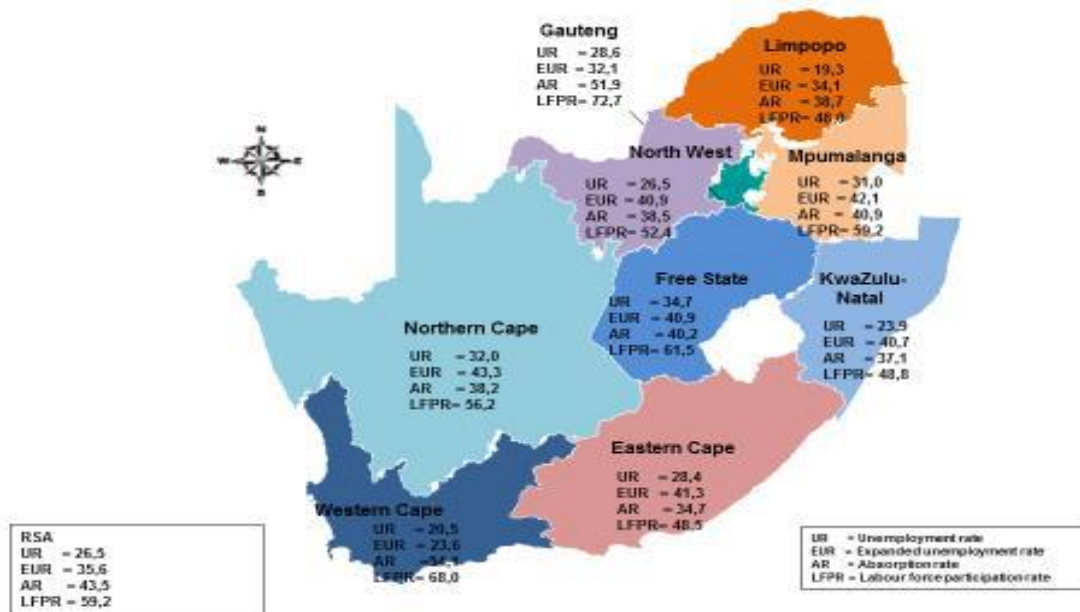


Source: IHS Global Insight Regional eXplorer version 1046

<sup>12</sup>IHS Global Insight Regional eXplorer version 1046, p26

### 3. Free State Labour Market

#### 3.1 Summary - SA labour market measures at a glance, Q4: 2016



#### 3.2 Labour force characteristics

Statistics South Africa in the recent Quarterly Labour Force Survey (QLFS) recorded 1 885 000 working age population (people in the age group 15-64) for Free State in Q4: 2016. The province registered 1 875 000 people for the same period in 2015. It is thus evident from *table 6* below that the population in the age group 15-64 increased with 10 000 year-on-year (Q4: 2015 to Q4: 2016). This implies that the economy of the province should grow faster in order to absorb this increasing number of new entrants into the labour market.<sup>13</sup>

Table 6: Labour force characteristics – Free State, Quarter 4:2016

	Oct-Dec 2015	Jan-Mar 2016	Apr-Jun 2016	Jul-Sep 2016	Oct-Dec 2016	Q-to-Q change	Y-on-Y change	Q-to-Q change	Y-on-Y change
	Thousand				Percent				
Population 15-64	1 875	1 879	1 882	1 884	1 885	1	10	0.1	0.5
Labour force	1 176	1 196	1 176	1 186	1 160	-26	-16	-2.2	-1.4
Employed	825	790	797	781	757	-24	-68	-3.0	-8.2
Unemployed	351	405	379	405	403	-2	52	-0.6	14.7
Not economically Active	700	683	706	699	726	27	26	3.9	3.8
Discouraged work-Seekers	71	66	81	85	82	-3	11	-3.4	15.7
Other	629	617	625	614	644	30	15	4.9	2.4
<b>Rates (%)</b>									
Unemployment rate	29.8	33,9	32,2	34.2	34.7	0.5	4.9	-	-
Employed population ratio (Absorption)	44.0	42,1	42,4	41.4	40.2	-1.2	-3.8	-	-
Labour force participation rate	62.7	63,6	62,5	62.9	61.5	-1.4	-1.2	-	-

Source: Stats SA, QLFS, Q4 2016

<sup>13</sup>Statistics South Africa, Quarterly Labour Force Survey (QLFS), Quarter 4, 2016

It is however important to note that discouraged work seekers increased year-on-year (Q4:2015 to Q4:2016) with 11 000. Not economically active population increased year-on-year with 3.8%. These trends clearly demonstrate the need for the Free State to grow the economy in order to bring down the level of poverty, unemployment and inequality. Increased manufacturing is regarded as a key sector that may bring about positive change in the current employment levels.

### 3.3 Employment by industry

Employment in the province during Q4: 2016 was the highest in Trade, followed by Community and Social Services and Private Households as per *table 7* below. These industries recorded a workforce of 193 000, 181 000 and 89 000, respectively. Employment a year ago (Q4: 2015) was the highest in Community and Social Services (213 000) followed by Trade (187 000) and Private Households (93 000).<sup>14</sup>

It is thus clear from this analysis that the mentioned sectors are instrumental in terms of creating jobs in the province.

The manufacturing sector experienced a decrease both year-on-year (Q4:2015 to Q4:2016) and quarterly (Q3: 2016 to Q4:2016) of 10 000 and 1000 jobs respectively. This situation highlights the importance of the department to channel more resources towards manufacturing, which is one of the priority sectors as per the Industrial Policy Action Plan (IPAP) as well as the Free State Growth and Development Strategy (FSGDS).

*Table 7: Employment per industry – Q4:2015 to Q4:2016*

	Oct-Dec 2015	Jan-Mar 2016	Apr-Jun 2016	Jul-Sep 2016	Oct-Dec 2016	Q-to-Q change	Y-on-Y change	Q-to-Q change	Y-on-Y change
	Thousands					Percentage			
Agriculture	64	72	66	60	65	5	1	8.6	1.3
Mining	35	35	35	28	17	-11	-18	-38.1	-50.3
Manufacturing	69	59	66	60	59	-1	-10	-2.3	-14.5
Utilities	9	10	9	10	10	0	1	2.8	12.6
Construction	53	57	56	55	54	-1	1	-2.2	2.1
Trade	187	166	155	176	193	17	6	9.6	3.4
Transport	38	34	36	38	36	-2	-2	-5.1	-4.2
Finance	65	57	59	63	53	-10	-12	-15.7	-18.0
Community & Social Services	213	201	214	193	181	-12	-32	-6.4	-15.2
Private households	93	100	101	97	89	-8	-4	-8.5	-4.4

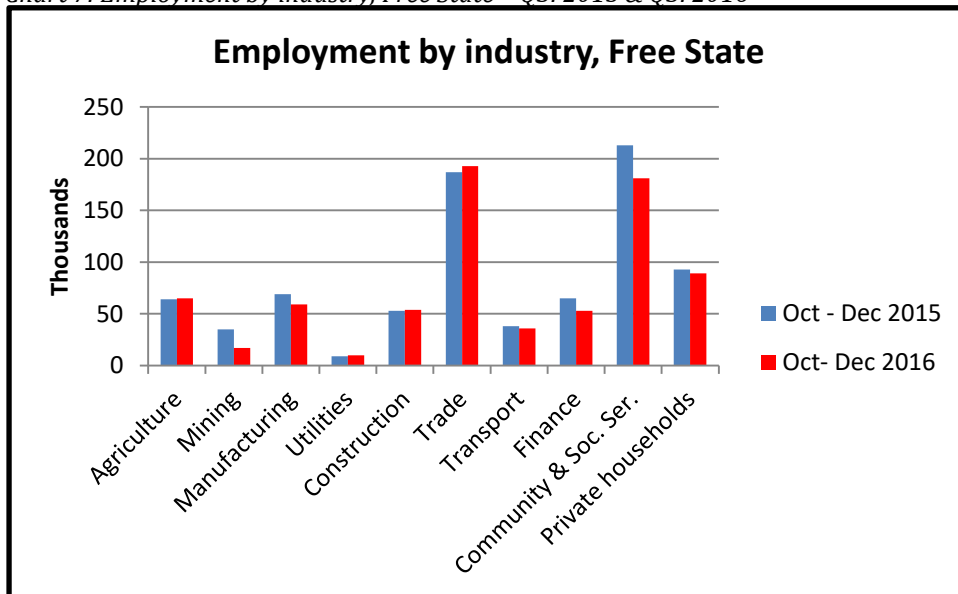
Due to rounding, numbers do not necessarily add up to totals.

**Source: Stats SA, QLFS, Q4 2016**

<sup>14</sup>Statistics South Africa, Quarterly Labour Force Survey (QLFS), Quarter 4, 2016

It is important to note that the highest employment gains quarter-to-quarter (Q3:2016 to Q4:2016) and year-on-year (Q4:2015 to Q4:2016) were observed in Trade contributing 17 000 and 6 000 jobs respectively. Job losses (as per *table 7* above, as well as *chart 7* below) were observed in seven industries (quarter-to-quarter) and in six industries (year-on-year) with the highest job losses in Community & Social Services both quarter-to-quarter (12 000 jobs) and year-on-year (32 000 jobs).

Chart 7: Employment by industry, Free State – Q3: 2015 & Q3: 2016



Source: Stats SA QLFS Q4, 2016

From the data provided above, it is clear that the priority sectors in the province did not create any additional jobs, except for agriculture. Jobs instead were lost in mining (both quarterly and annually), manufacturing (both quarterly and annually) and in transport (both quarterly and annually). Which means a lot needs to be done to radically transform these sectors.

#### 4. Conclusion

The manufacturing economy in the Free State is dominated by the petrochemical subsector within the Fezile Dabi District municipality. The petrochemical subsector has grown at a rate of 4.5% per annum since 1996 – a rate more than the national average of 4.2%.<sup>15</sup> The manufacturing sector compared to the other sectors contributed the highest (27.6%) towards the GVA of Fezile Dabi, as well as the

<sup>15</sup>Lochner, M. (2011). Manufacturing Report, University of the Free State (UFS)

highest if compared to the contribution of the manufacturing sectors in the Mangaung Metro and four district municipalities.

### Other key findings

- The manufacturing sector contributed 17.6 billion or 10.08% to the GVA of the Free State Province in 2015 (current prices).
- The manufacturing sector recorded an average annual growth rate of 1.53% in 2015, which is higher than the primary industries, as well as the electricity sector.
- It is expected that manufacturing, when looking at the *gross value added (GVA) by broad economic sector*, is to grow at an average of 0.98% annually from R 15.3 billion in 2015 to R 16.1 billion in 2020 in Free State Province.
- The manufacturing sector experienced a decrease both year-on-year (Q4:2015 to Q4:2016) and quarterly (Q3: 2016 to Q4:2016) of 10 000 and 1000 jobs respectively.

## 5. Recommendations

The following recommendations for manufacturing in South Africa (which is also applicable for Free State) are found in the McKinsey report<sup>16</sup>:

- **Advanced manufacturing.** To focus on a globally competitive manufacturing hub with high-value-added categories such as automotive, industrial machinery and equipment, and chemicals. To realize this opportunity, Free State manufacturers will have to pursue new markets and step up innovation and productivity.
- **Natural gas.** Natural-gas plants - which are fast to build, entail low capital costs, and have a small carbon footprint. It can provide an alternative to diversify the power supply.

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<sup>16</sup>McKinsey Global Institute (2015), "South Africa's Big Five: Bold Priorities for Inclusive Growth". September, 2015.



- Value-adding to raw and unprocessed agricultural exports. With consumption rising in markets throughout sub-Saharan Africa and Asia, Free State could triple its agricultural exports by 2030. This could be a key driver of rural growth, benefiting the nearly one in ten South Africans who depend on subsistence or smallholder farming.

This priority sector may also contribute in creating long-term, sustainable job opportunities by:

- Strengthen SEZ in competitive export industries, cluster complementary businesses for greater economies of scale and reduction in transport costs, skills transfers, etc.
- Value chain development, especially in agriculture, bio-fuels and mining
- Strengthen trade agreements and diplomatic marketing with other countries.
- Strengthen research and innovation funding in the manufacturing sector.

Successfully delivering on these priorities will move Free State closer to realizing its Vision 2030 of “the future we want” characterized by shared prosperity for all. The province, however firstly have to embrace some fundamental changes to become more globally competitive; such as to address a serious skills shortage through a dramatic expansion of vocational training. It is also required that business and government have to strengthen existing or create new partnerships characterized by a shared vision, collaboration, and trust.

**Annexure 1: Gross Value Added by Region (GVA-R), Broad Economic Sectors (9 sectors), Sector's share of regional total (%), 2015**

	Agriculture	Mining	Manufacturing	Electricity	Construction	Trade	Transport	Finance	Community and social services
Free State	4.8%	11.7%	10.1%	4.2%	2.8%	14.6%	10.7%	15.4%	25.8%
Mangaung	1.5%	0.6%	4.2%	3.2%	2.9%	17.3%	13.5%	21.2%	35.6%
Xhariep	14.1%	11.9%	2.8%	2.2%	4.3%	14.0%	10.2%	7.7%	32.7%
Lejweleputswa	5.3%	42.3%	2.8%	2.0%	1.8%	11.8%	7.4%	11.4%	15.1%
Thabo Mofutsanyana	9.7%	1.3%	5.5%	2.6%	3.5%	18.4%	11.8%	15.3%	31.8%
Fezile Dabi	3.8%	12.0%	27.6%	8.7%	2.5%	10.3%	8.4%	11.8%	15.1%

Source: IHS, Rex Regional eXplorer, 1029