

Briefing on the status of Master Plans to the Portfolio Committee on Trade and Industry

27 October 2020



the dtic

Department
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

the dtic - together, growing the economy

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Overview

- Background
- Economic Reconstruction and Recovery Plan
- Master Plans under development and implementation
- Objectives of the Master Plans
- Progress-to-date including achievements
 - Retail-Clothing Textile Leather and Footwear Master Plan
 - Poultry Master Plan
 - Sugar Master Plan
 - Automotives Master Plan
 - Furniture Master Plan
 - Steel Master Plan
- Conclusion and next steps

Economic Reconstruction and Recovery Plan

Economic Reconstruction and Recovery Plan

- On 15 October 2020, President Ramaphosa tabled the Economic Reconstruction and Recovery Plan at a joint sitting of parliament
- The Plan is the culmination of work between government, business, labour and community at Nedlac, and includes key commitments from each stakeholder to achieve its objectives
- The Plan includes measures to:
 - achieve sufficient, secure and reliable energy supply within two years;
 - create mass employment;
 - Increase infrastructure investment;
 - reduce data costs;
 - **increased localisation for reindustrialisation and growth;**
 - resuscitate vulnerable sectors such as tourism, which have been hard hit by the pandemic.

dtic to play
active role



Economic Reconstruction and Recovery Plan

- The Plan has a large focus on increasing local production, and improving the industrial dynamism of key sectors

“To place our economy on a new trajectory, we are going to support a massive growth in local production and make South African exports much more competitive.”

"There are huge opportunities that we can seize through effective partnerships, targeted deployment of resources and the right policies."

- President Ramaphosa, Address to the Joint Sitting of Parliament on South Africa's Economic Reconstruction and Recovery Plan, 15 October 2020

Implementation of Master Plans

The role of master plan implementation in the ERRP

“A vital part of growing our industrialisation effort are the sectoral masterplans, which bring all partners together to agree on specific measures to improve productivity, investment and competitiveness.”

“A central pillar of this work is the transformation of our economy, creating space for new black and women entrants and take deliberate steps to change ownership and production patterns.”

- Since June 2019, a number of Master Plans have been developed and others are currently being developed to help create conducive conditions for industries to grow.
- This will include assisting companies to improve their industrial capacities and sophistication, focusing more on export orientation, and reclaiming domestic market space lost to imports.

The dtic: Progress with sector master plans

4 dtic Master Plans completed covering more than 500 000 direct workers

- 2 deals with food security and rural development: Sugar and Poultry
- 1 deals with labour-intensive sector with predominantly women workers and entrepreneurs: Retail-Clothing, Textile Footwear Leather
- 1 deals with major earner of foreign exchange for South Africa and platform for advanced manufacturing: Car manufacturing

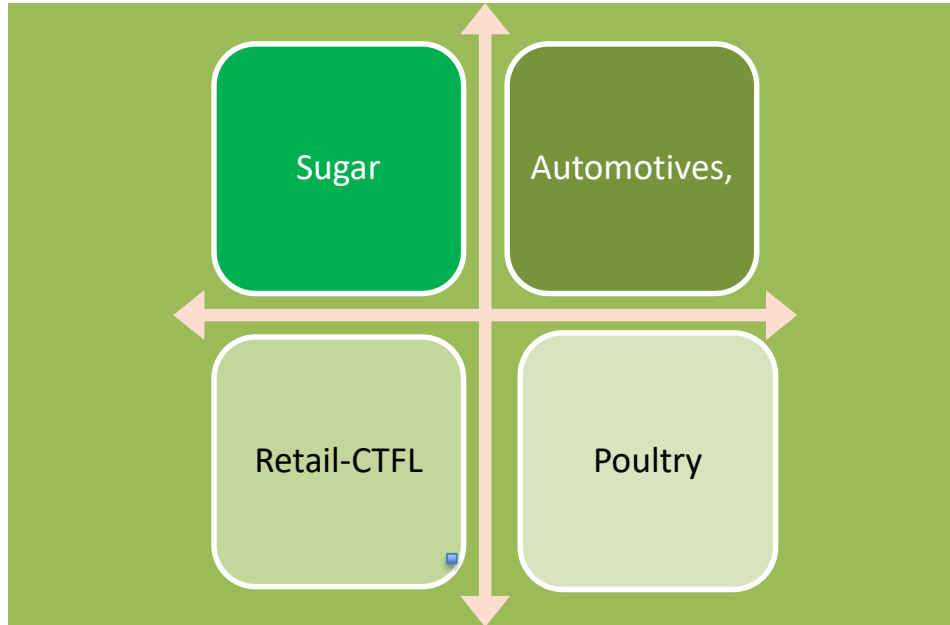
Reciprocal commitments for all stakeholders critical for successful implementation of Master Plans, including focus on localisation, development of SMEs and the informal economy

Implementation now under way.

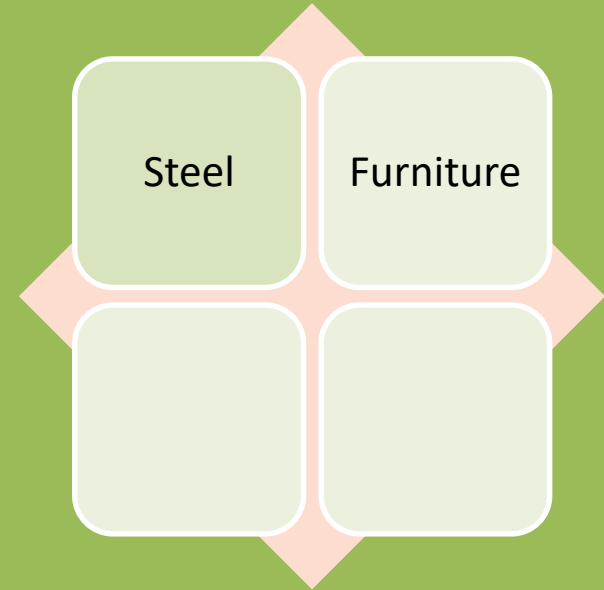
- **dtic Masterplans in Development in this Financial Year**
 - Steel & Metal Fabrication
 - Furniture

Master Plans under development and implementation by the dtic

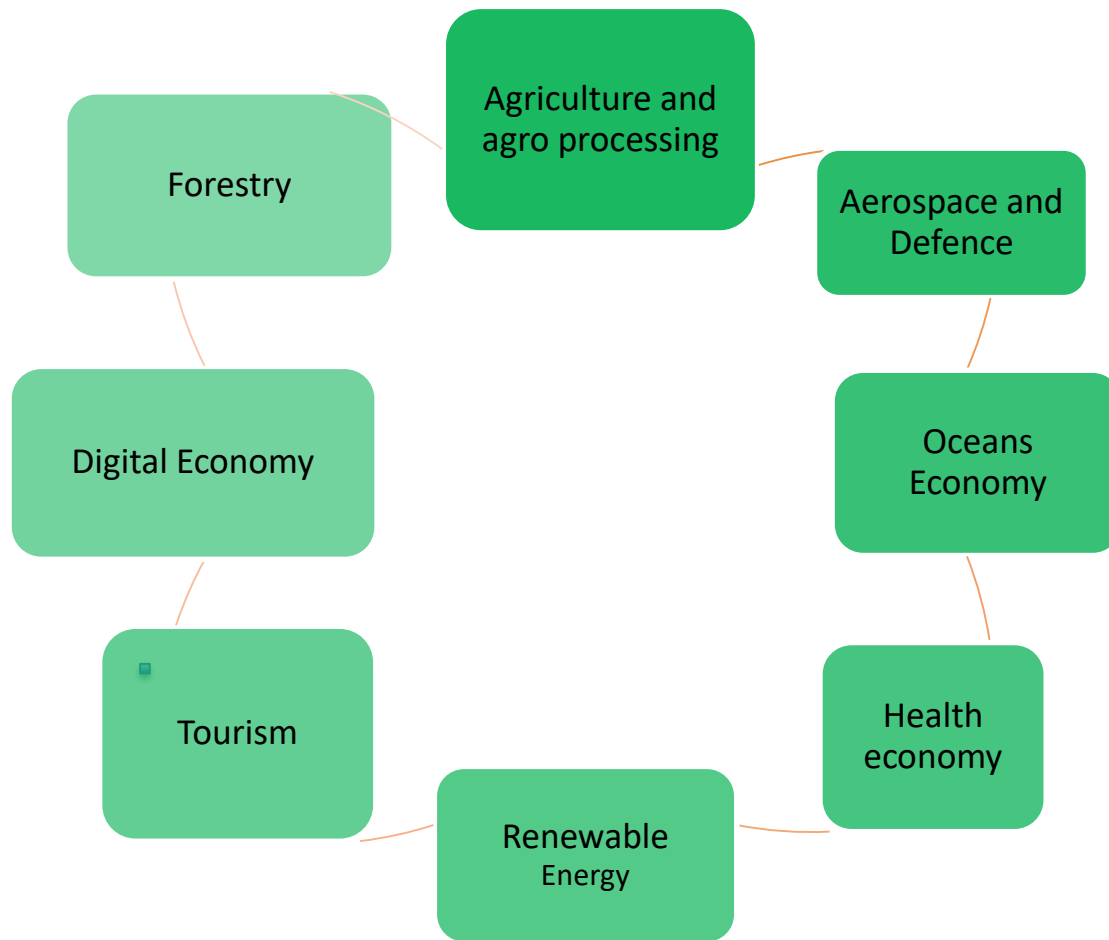
- Dtic Masterplans in implementation**



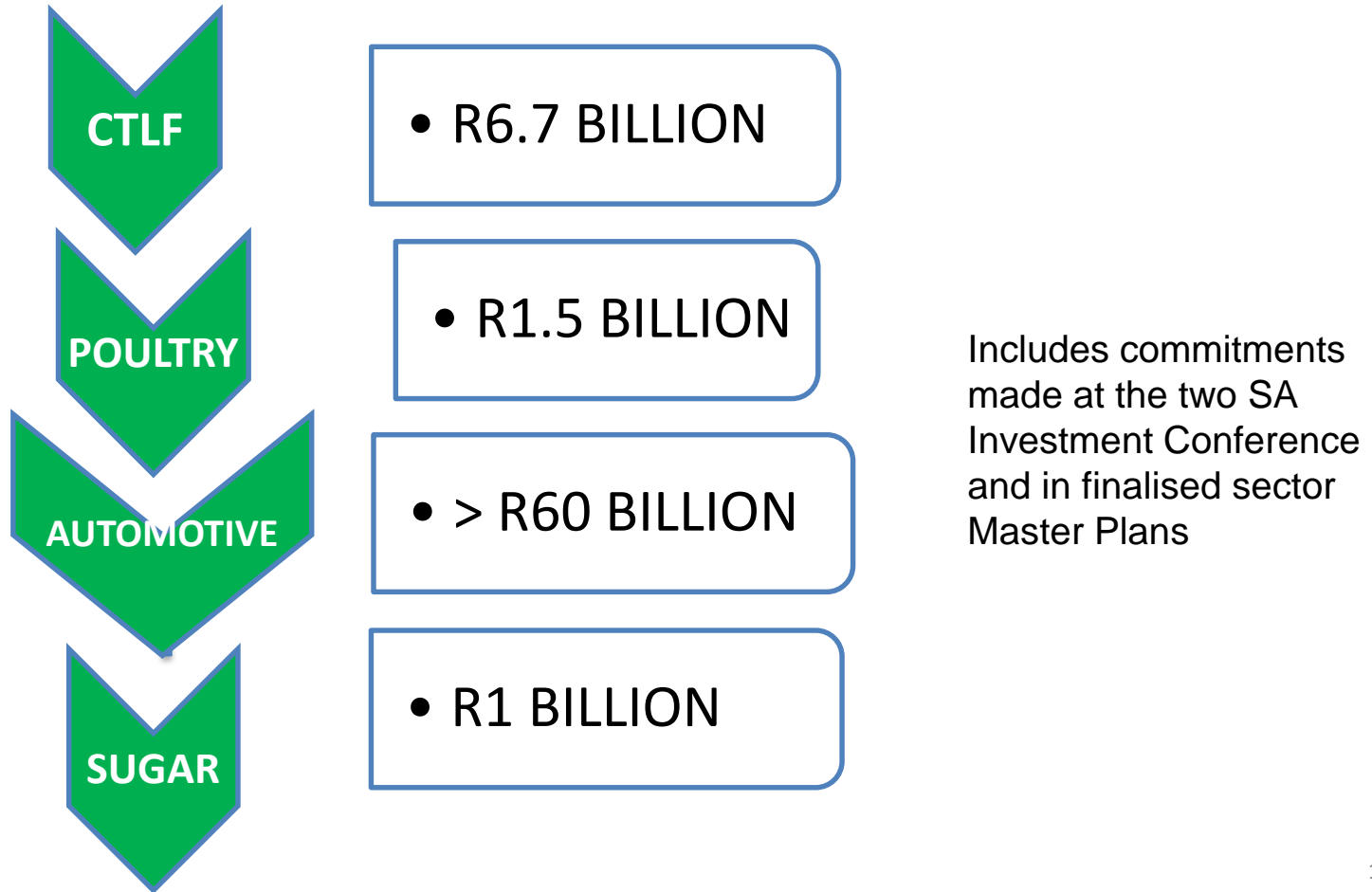
Master plans under development



Master Plans under development and implementation by other government departments



INVESTMENT COMMITMENTS MADE TO DATE



RETAIL-CLOTHING, TEXTILE, LEATHER, & FOOTWEAR MASTER PLAN



RETAIL- CTFL OBJECTIVES

The South African Retail-CTFL value chain generates an estimated R74 billion in gross value added, or 1,7% of GDP.

The R-CTFL value chain sustains approximately 212 000 formal jobs with some 92 000 jobs estimated in the manufacturing sector and 120 000 in the retail portion of the value chain.

Objectives

- Grow local procurement from 44% to 65% of all clothing and footwear sold in SA
- Combatting of illegal imports;
- Creation of a dedicated incentive support
- To increase value chain employment
- To broaden market development in adjacent value chains and the informal economy

IMPLEMENTATION FOCUS: RETAIL CTFL MASTER PLAN

Local procurement by retailers as reported in the media: major retailers on track to ramp up local design manufacturing and on-shoring of products

1. **The Foschini Group** (TFG) Africa **now sources 35%** of its clothing locally (on-shore), a significant improvement given that five-years ago as little as 20% of its apparel items were locally sourced. TFG's factories in Maitland and Caledon in the Western Cape are currently running at 100% operational capacity, and has announced investment in WC factories expected to create 530 jobs this year and 5 000 within 5 years
2. **Truworths'** local textile to total textile purchases has reached 45% and expected to increase to 50% over the next few years.
3. **Mr Price** now sources 35% of total merchandise units locally, worth about R9.2 billion in retail sales. This is an increase from approximately 31% in 2015, which at the time totalled R3 billion in retail sales. Mr Price's committed is to procure 1,357 tons of cotton from local producers.
4. **Game** launched its *Style essentials* clothing line in August 2020, with about 25% of the range being locally manufactured.
5. **Woolworths:** Opened a new factory in Port Shepstone with Baby/Children's underwear supplier (Created additional 200 jobs, enable import replacement program); Set up new black woman-owned supplier, Davis Clothing, for Baby products; Moved formal bottoms garments from Bangladesh to SA; Moved woven shirts from Bangladesh to SA
6. **Pick n Pay Clothing** announced a series of collaborations with SA fashion designers such as Gavin Rajah, Julia Buchanan and Katekani Moreku to improve accessibility of locally produced styles.

IMPLEMENTATION FOCUS: RETAIL CTFL MASTER PLAN

7. **Pep Clothing (PepClo)** has four local factory divisions manufacturing basic school clothing, knitted underwear and flip flops. Pep has recently also started making personal protective equipment (PPE) with ambitions to produce 500 000 disposable gowns over the next financial year. Expansion of production for coveralls expected in February 2021.
8. **Investment secured** : R564 million (Pepkor R30 million, The Foschini Group R350 million and Glodina R184 million).
9. Woolworths has opened a new Baby products factory and t-shirt factory locally.
10. The Foschini Group acquisition of Jet for R480m = 4300 local jobs saved.
11. The DTIC and IDC's **Clothing, Textiles, Footwear and Leather Growth Programme** (CTFLGP) programme has been reviewed with extensive industry and labour inputs – from round table virtual discussions.
12. An agreement was reached that due to budgetary constraints the 2020/21 financial year will only provide an Interest Subsidy for Working Capital. The purpose of this incentive is to offer the industry an opportunity to access short-term industry stabilisation funding to finance working capital requirements and mitigate the consequences of the COVID-19 pandemic. The Guidelines have been finalised and published.
13. **Local PPE Production**: Since the start of the national state of disaster, the **dtic** working with business and labour social partners, has facilitated start-up, expanded production, or SAPHRA licensing for 52 manufacturing companies in South Africa, producing a range of essential items like masks, gowns, coveralls and swabs. Production capacity for medical grade face masks has increased from 6 million to 13 million per months.

IMPLEMENTATION FOCUS: RETAIL CTFL MASTER PLAN

14. Puma SA
approaching 1million
pairs of locally
manufactured styles



Locally-made Puma footwear: The Terra-Mid Africa stitchdown, the Jomo Sano soccer boot, and one of a range of pool sandals.



15. Corrid Shoes to
launch WYSO brand
First World Sustainable
School Shoes in SA,
UK, NZ and Australia



16. Neptune's locally
manufactured boots
supplied to rest of
Africa



17. CR Brands a niche
General goods and Leather
Goods manufacturer
employing 200 workers
diversified, into wet wipes
and adult incontinence for
major SA pharmacy chains.



18. Sneaker factory
diversified into PPEs
created 20 new
jobs. Acquired
necessary
certification and
permits e.g IE,
SAHPRA, NRCS , ISO

IMPLEMENTATION FOCUS: RETAIL CTFL MASTER PLAN

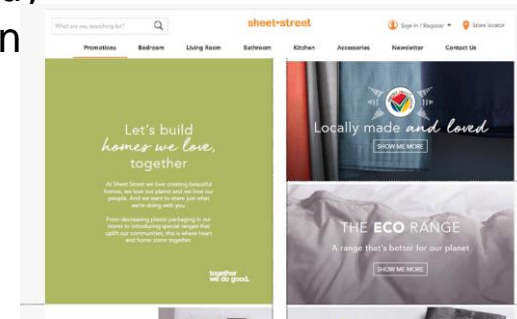
Combatting illegal imports: The Inter Agency Working Group (IAWG) with SARS leading the work, has continued its work with a focus on clamping down on illicit trade. Reports show success in a range of areas in the sector in the last 6 months (September 2019 to February 2020):

19. Seizures of clothing items illegally imported: 523 seizures, valued to R157 million on various illegally imported or counterfeit clothing items.
20. Seizures of counterfeit footwear: 381 seizures finalised, valued at R1.1 million and equating to 134 501 counterfeit items.
21. During COVID-19 lockdown, SARS also seized 34 containers containing illegal CTFL goods, valued at almost R230 million, that was intending to enter our Republic at our ports of entry.



Localisation efforts

22. the dtic is working with NEDLAC, NT and provincial authorities to monitoring and enforcement of the CTFL 100% local content designated legislation with the public sector procurement.
23. Proudly SA developed a portal to house local manufactured PPE including fabric face masks during national lockdown that continues to focus on promoting buy local campaigns.
24. The DTIC in partnership with other government entities to launch **“Why Buy Local”** educational campaign – working on informing society on the rational for buying local – deep dive on the impact on our Economy.
25. Retailers are joining the call to support local by also launching buy local/support Made in RSA campaigns and awareness campaign to increase domestic demand.



R-CTFL Master Plan in the Media

BUSINESS INSIDER | BUSINESS

‘Made in SA, not China.’ Why Foschini, Mr Price and Truworths now want local clothes

Garth Theunissen, Business Insider SA

Oct 15, 2020, 01:36 PM

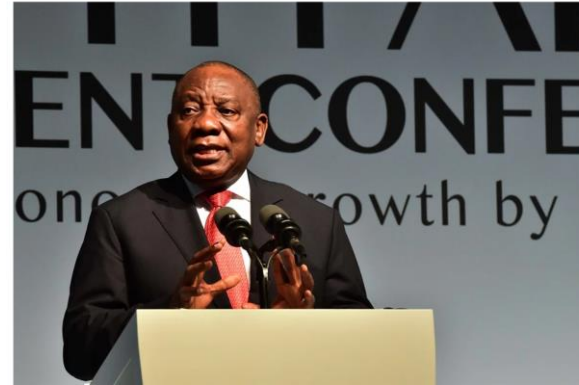


17 Nov 2019

SA's biggest retailers commit to local textiles

City Press Riana De Lange

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 Creamer Media's Engineering News

Govt wants to accelerate localisation plan for textiles, footwear

... the implementation of the masterplan for the sector earlier this month. ... Retail CEOs present included Foschini Group boss and National ...

1 month ago

POULTRY MASTER PLAN



POULTRY MASTER PLAN

Objectives

- To refocus the industry to exports, reclaim the domestic market and change the economic value-extraction - premium meat (breasts) and discounted meats (bone-in/thighs). Saving of 54 000 jobs; creating an initial 3 600 new jobs, with employment growing beyond this rate as exports grow further.

Five key pillars were agreed:

- Expanding production, with clear targets for the period to 2023;
- Improving the consumption of locally-produced chicken in South Africa;
- Driving exports of chicken meat;
- Regulatory reforms to address imports of illegal and health-risk chicken meat; and
- Trade measures to protect local industry and review tariffs

IMPLEMENTATION: POULTRY MASTER PLAN

1. **Increased localisation:** Production of South African poultry increased by 5% during the first 8 months of the year, when compared to the same period last year, with an additional 1 million birds per week produced.
2. **New localisation:** a Poultry Designation Report has been finalised and submitted for consideration by National Treasury.
3. **Investment:** South African Poultry Association reported R735 million new investment, out of R1.5 billion commitment (428 jobs have been created).
4. **Trade support:** gazetting of a 62% bone-in chicken portions, and 42% boneless portions import tariff (Pillar 5 Poultry Master Plan).
5. **Export promotion:** Taskteam (DALRRD, DOH and industry) set up to deal with food safety and standards of both imported and locally produced poultry, including review of identified regulations.
6. **Regulatory environment:** DALRRD completed the traceability policy for imports and Pilot Phase for implementation is underway. Discussions between stakeholders on packaging and labelling of imported meat from multiple countries

IMPLEMENTATION: POULTRY MASTER PLAN

7. **New tariff dispensation:** the Minister of Trade, Industry and Competition has directed ITAC to review the tariff structure and to recommend measures to achieve the objectives of the Masterplan
8. **Cost competitiveness:** A study is being done on industry cost drivers. A broad overview of global trends on the cost production of soya and maize underway.
9. **Transformation:** 20 black-owned independent farms established with support from SAPA since the beginning of the year

SUGAR MASTERPLAN



SUGAR MASTER PLAN

The SA sugar industry concentrated in the rural areas of KwaZulu – Natal and southern Mpumalanga -

- An estimated 20,200 growers - of which there are:
 - Approximately 19 300 black growers (producing 24% of the 19 million tons of cane produced each year);
 - of which approximately 18 770 growers are small-scale farmers producing 11% of total industry production;
 - Approximately 850 'established' growers (producing 69% of the 19 million tons), of which 680 are large-scale commercial farmers; and
 - approximately 50 farmers operating miller-owned estates, producing 7% of total production.
- 14 mills sugar mills – 3 are independently owned and operated, and the balance owned and operated by the three large milling companies Tongaat-Hulett, Illovo and RCL Foods, who also operate the major sugar refineries.
- The industry currently employs an estimated 65,000 people directly, and through upstream and downstream multipliers, supports a further 270,000 indirect jobs.
- The sugar industry sustains an estimated 1 million livelihoods, mostly in deep rural areas.

SUGAR MASTER PLAN

Objective

- A globally competitive, sustainable and transformed sugarcane value-chain and bio-economy that actively contributes to South Africa's economic and social development.

Seven key pillars agreed upon

- Restore the local market and offtake commitments - 80-95% local procurement
- Producer Price Restraint & Certainty – limit prices increases to CPI
- Product Tax Policy Certainty - 'just transition' arrangement to maintain the existing Health Promotion Levy only on sugar
- Strategic Trade Protection – review import tariffs for deep sea imports
- Job Retention and Mitigation – industry wide job retention and mitigation plan
- Small-Scale Grower Retention and Support –deployment of supplier and enterprise development support
- Transformation -Transformation plan to support small scale growers

IMPLEMENTATION: SUGAR MASTER PLAN

1. **Sugar Master Plan** has been finalised (Signing Ceremony to be held).
2. **Localisation:** Jan-Aug 2020: Overall Sugar imports decreased by 11% and deep-sea Sugar imports decreased by 16.4%
3. **Designation:** Sugar industry has been designated (23 June 2020) and exempted in terms of the Competition Act for an exemption, to allow collaboration between industry stakeholders to implement the Master Plan (20 October 2020).
4. **Transformation:** Sugar Regulations amended and extended to 31 March 2024 to transform the governance of South African Sugar Association through the inclusion of small-scale cane growers as equal partners in the formal governance structures (23 June 2020).
5. **Investment:** South African Sugar Association set aside R1 billion over 5 years towards industry transformation, and **R575 million** has been allocated to remedy inequalities experienced by black sugarcane growers.
6. **Diversification:** the Biofuels Regulatory Framework (BRF) Gazetted on 7 February 2020 provides a policy and regulatory framework for the implementation of the Biofuels Industrial Strategy that can support diversification.

SUGAR MASTER PLAN IN THE MEDIA



AGROPROCESSING AND ECONOMIC RECOVERY

- Focus on product penetration, marketing in Africa more especially in the context of ACFTA
- Expand production in major value chains, compete in export markets, and create import replacements in the domestic market
- As a consequence of Covid 19, consumers in the established markets such as Europe and Asia have found a renewed interest in immune boosting foods such as citrus, kiwis, peppers etc all of which presents an expansion opportunity for a country like South Africa
- Increase economic activity and earnings in township economies through the production of affordable furniture for public institutions and promotion of timber structures for human settlements
- Investment support on designs, technology upgrade, recapitalisation/retooling, upgrade of the South African Furniture Industry to ensure leading edge technology
- There is a need to improve access to relief stimulus packages to boost the cash flows of agro enterprises that were affected by Covid-19

AUTOMOTIVE MASTER PLAN



AUTOMOTIVES MASTER PLAN

Objectives

- Grow domestic car production to 1% of global output (projected to reach 140 million units annually by 2035);
- Increase local content in South African assembled vehicles to 60% (from 39% in 2015);
- Double employment in the automotive value chain (from 112 000 in 2015 to 224 000);
- Commitment to double production from 600 000 cars to 1,2 million cars;
- Improve auto industry competitiveness to that of leading international competitors;
- Achieve industry transformation across the value chain by ensuring that 25% Black Owned involved in Tier 2 & Tier 3 component manufacturer levels, dealership networks and authorised repair facilities; and
- Deepen value addition across selected commodities/technologies.

IMPLEMENTATION: AUTOMOTIVES MASTER PLAN

1. A **record R201,7 billion, equating to 15,5% of South Africa's total exports** registered in 2019,
2. **387 125 vehicles exported** worth R148,0 billion, with a record R53,7 billion in automotive components, exported to 151 countries in 2019.
3. All work on track to finish construction work of **Tshwane SEZ Auto Hub** by June 2021 as per the Ford Motor Company briefing held on 08 Sept 2020.
4. **Investment:** More than R60 billion in new investment committed at the SA Investment Conferences, and towards the Automotive Industrial Transformation Fund
5. **Transformation** :Administrative issues related to legal registration of the Automotive Transformation Fund has been completed with 5 of the 7 OEMs having signed the MOA. A database of potential **beneficiaries** compiled and ready for implementation in 2021.
6. **Export promotion:** SKD kits support through APDP granted to scale up exports efforts in the identified markets


IMPLEMENTATION: AUTOMOTIVES MASTER PLAN


7. **Localisation:** Draft APDP 2 guidelines and regulations due for implementation in 2021, published in the Government Gazette on 03 July 2020 for interested parties to comment. Comments received and being processed-
8. Steady progression in average **local value addition** year on year, moving from 41% in 2018 to 43% in 2019.


AUTOMOTIVES MASTER PLAN IN THE MEDIA

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 **#Didyouknow:** The focus on Africa aligns well with the focus of the South African Automotive Masterplan (SAAM) 2021-2035. SA's geographic position places it to benefit from the increased demand for vehicles and automotive components on the continent.
bit.ly/2AyMi32



 BMW South Africa and 9 others

12:57 PM · Jul 23, 2020 · Twitter Web App

 **Moneyweb News**
@Moneyweb

One of the South African Automotive Masterplan's key targets is to achieve 1% of global vehicle production by 2035 (up almost 600 000 units to 1.4 million units a year).



The road ahead for SA's slowing automotive sector
Export market is key as low economic growth continues to bite at home.
moneyweb.co.za

7:35 PM · Jan 15, 2020 · TweetDeck

4 Retweets 4 Likes

← **Tweet**

 **Deloitte SA**
@DeloitteSA

Read about how the South African Automotive Masterplan ([#SAAM](https://twitter.com/SAAM)) 2035 aims to double employment in the sector from 112 000 to 224 000 jobs by 2035, & position South Africa to produce 1.4-million vehicles.
deloitte.co.za/31UgRsF [#AfricaAutoInsights](https://twitter.com/AfricaAutoInsights)



Rooting SA: Strengthening the local automotive industry | Co...
Rooting SA: Strengthening the local automotive industry Value beyond compliance series
deloitte.co.za

3:30 PM · Nov 15, 2019 · Sprinkl

STEEL MASTER PLAN



STEEL MASTER PLAN

Objectives

- Supply side -
 - Improved industrial dynamism and investment
 - Address input constraints (energy, transport and scrap metal inputs)
 - Stepped-up implementation of support measures
- Demand side -
 - Import replacement to increase demand
 - Local content in the SIPs / Infrastructure SA pipeline
 - Export focus in Africa
 - New industries / products.
- Institutional
 - Business-labour partnerships
 - Improved public administration

IMPLEMENTATION: STEEL MASTER PLAN

1. **Master Plan:** A draft has been developed and is the subject of consultations.
2. **Scrap metal:** In July 2020, export of scrap metal suspended for a 4-month period, to allow ITAC to investigate the supply of affordable good quality scrap to the domestic steel producing industry. Amendments to the Price Preference System (PPS) was effected, to improve access to affordable scrap metal for the domestic steel and other metal producing industries. The introduction of an export tax as a long-term policy measure is currently under consideration.
3. **Trade support downstream:** in July 2020, safeguard duty on threaded fasteners of iron or steel implemented
4. **Trade support primary steel:** in August 2020, safeguard duty on certain primary steel products maintained temporarily to allow for ITAC investigation on longer-term desirability;

IMPLEMENTATION: STEEL MASTER PLAN

5. **Customs fraud:** SARS has agreed to prioritise and include steel industry in inter-agency working group to address under-invoicing and mis-declarations.
6. **Localisation: the dtic** has collaborated with **Eskom** and industry to ensure localisation of High Voltage Composite Insulators. A local company, Vexila, is the first ever African manufacturer to secure a contract of this nature with Eskom.
7. **Transnet** has committed to review requirements and to work with the local industry on building local supply chains for large-scale projects and consumables
8. **Infrastructure** - Infrastructure SA was established, consensus was reached at Nedlac that inputs for infrastructure should be manufactured locally.

LOCALISATION SUCCESS : SGB-SMIT POWER MATLA (SPPM) SUCCESSFULLY TESTING THE 2ND 500MVA TRANSFORMER

- ❑ SGB-SMIT POWER MATLA (SPPM) Pretoria branch successfully tested the 2nd 500MVA Transformer unit for ESKOM. SSPM is the only manufacturer of 500MVA in Africa.
- ❑ The company has a successful track record of manufacturing and testing high voltage transformers with the most recent 500 MVA/400/132/22 kV unit passing all factory acceptance tests at the end of July 2020.
- ❑ This is the second 500MVA 400kV unit successfully passing Factory Acceptance Test (FAT) in 2020. The Pretoria plant presently have 3 additional similar units in production, all which are destined for the national utility to support and augment the power grid.



FURNITURE MASTER PLAN



FURNITURE MASTER PLAN

- Furniture contributes 1% to manufacturing GDP.
- The sector employed 68 223 people in 2019 in more than 2 200 registered companies , with an additional 28 195 informal jobs.
- The sector had total imports of R7,5 billion against exports of R3,5 billion in 2019, and a trade deficit of R4 billion.

Objectives

- To build a fast growing, profitable, inclusive and sustainable South African furniture industry
- Increase local production by 50% from current baseline levels by end 2021;
- Improve domestic & export sales by 100% from current baseline by end 2024;
- Increase formal employment from current levels by 25% by end 2022 and;
- Participation of black and/or women participants in industry will double from current baseline by end 2022.

INITIAL ACTIONS: FURNITURE MASTER PLAN

1. A draft Master Plan has been developed and is still subject of consultations
2. **Illegal imports:** SARS reviewing certain tariff headings to reduce the declarations under “other”.
3. **Localisation:** engagements with big retailers such as Lewis, JD Group, Coricraft, Weytlands and big manufacturer BRAVO to explore localisation opportunities.
4. **Local procurement:** working with Proudly SA to secure procurement commitments from private schools, private hospitals, big corporates and restaurants.
5. **Competitiveness:** in order to improve competitiveness in the sector through skills, qualification developed and commitment to co-fund the curricula has been secured from one manufacturer.

FURNITURE MASTER PLAN IN THE MEDIA

 SAFI
@SAFIFurniture


Listen to Bernadette Isaacs, MD of SAFI, speaking to @MichaelJAvery on @Classic1027 about the Furniture Industry Master Plan being developed in partnership with @the_dti
iono.fm/e/817432

#furnitureindustry #furnituredesign #FIMP
#Masterplan #SAFI #SAfurniture

 CLASSIC 1027
The creation of a furniture industry master plan
Bernadette Isaacs, MD of South African Furniture Initiative
iono.fm

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SAFI applauds local procurement amidst the need for hospital beds and temporary healthcare facilities



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Furniture manufacturers urged to explore available funding schemes

24 JUN 2020 DAVID DODD / PHOTO: PDP

While the South African furniture manufacturing sector has endured some tough times in recent years, there are still significant financial incentives for high-quality projects. This is the view of two funding specialists who recently addressed furniture manufacturing entrepreneurs and industry stakeholders in a business webinar.



Conclusion and next steps

- Master Plans are industry social pacts, in which each partner is expected to contribute, shifting away from a state-centric approach to a partnership model
- COVID-19 demonstrated the fragility of global supply chains through unprecedented disruptions as result. While these imposed immediate costs on the economy, they also provide a stronger rationale for the localisation efforts
- We will sharpen our non-financial support and focus efforts on addressing illicit trade including through use of trade measures to support domestic industry
- Stabilisation of industries remains key in our efforts to protect jobs
- **Next 5 months :**
 - Finalize the Steel Master Plan
 - Finalise the Furniture Master Plan
 - Implementation (and monitoring of progress) with Retail-CTLF, Autos, Sugar and Poultry Masterplans
 - Deepen localisation efforts across all Master Plans
 - Make adjustments to take account of Covid-19 as well as Economic R&R Plan

Thank you

Acronyms

- RIS – Re-Imagined Industrial Strategy
- R-CTFL – Retail-Clothing, Textile, Footwear & Leather
- IAWG – Inter-Agency Working Group
- APDP – Automotive Production and Development Programme
- EOC – Executive Oversight Committee
- OEM – Original Equipment Manufacturers
- PPE – Personal Protective Equipment
- PI – Production Incentive
- CIP – Competitiveness Improvement Programme
- CTCP – Clothing and Textiles Competitiveness Programme
- SARS – South African Revenue Services
- NEDLAC – National Economic Development and Labour Council
- ITAC – International Trade Administration Commission
- HS – Harmonised System