



From Vision to Valuation: South Africa's journey to develop the first experimental Biodiversity Economy Satellite Account

Istat Workshop: Challenges in
the measurement of nature in
official statistics

26 May 2026

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SANBI

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Overview

- NCA in South Africa and its vision
- Stats SA Natural Capital series
- Experimental Biodiversity-Based Tourism Estimates for South Africa
- Experimental Biodiversity Economy Satellite Accounts for South Africa in development
- Key lesson and take-home message



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Natural Capital Accounting in South Africa and it's vision



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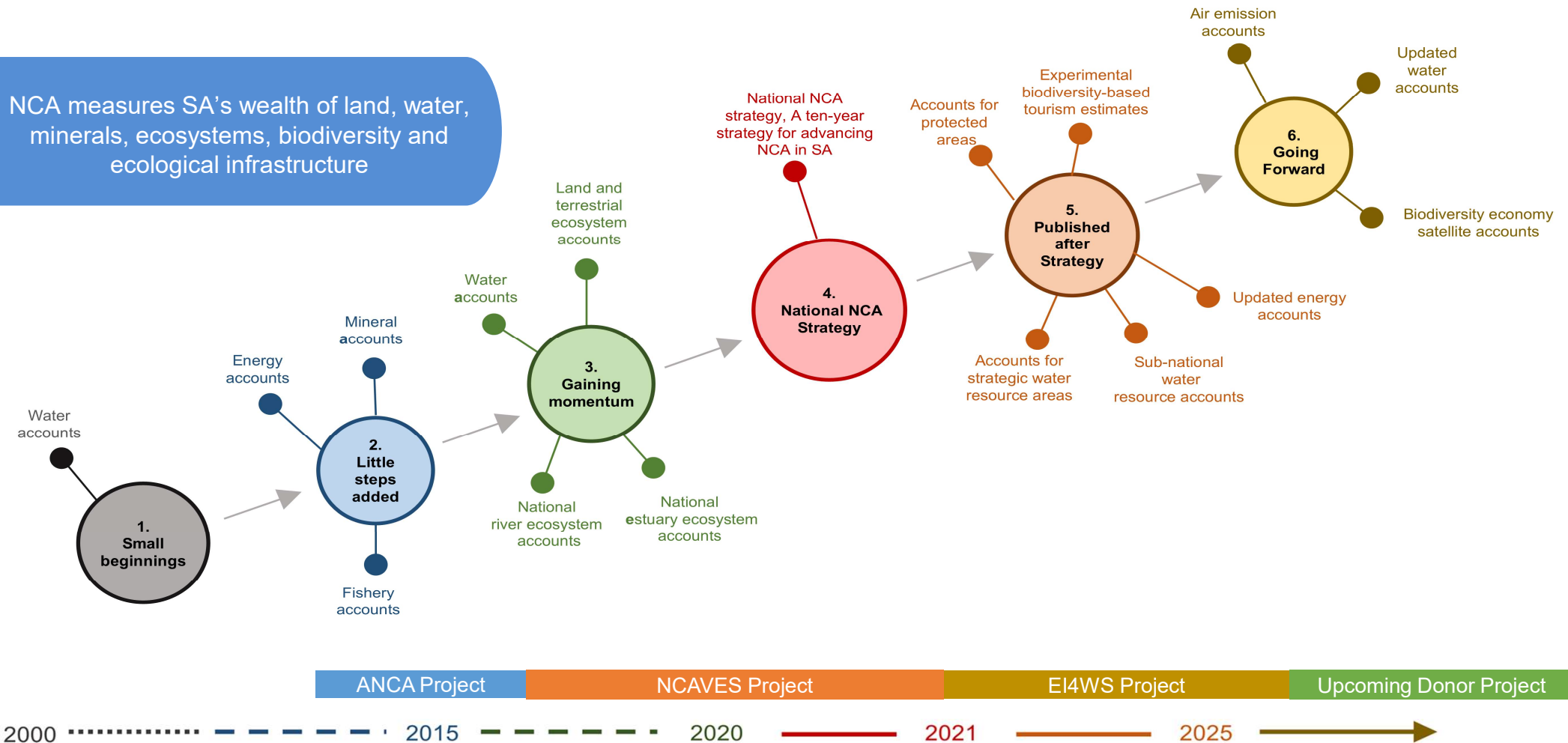
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NCA in South Africa: A two-decade journey

NCA measures SA's wealth of land, water, minerals, ecosystems, biodiversity and ecological infrastructure



From early beginnings with national water accounts in 2000, momentum has grown. Since 2014, donor funded projects have helped to increase capacity, especially for ecosystem accounting.

National NCA Strategy to take NCA forward in South Africa



Published by Stats SA in
June 2021

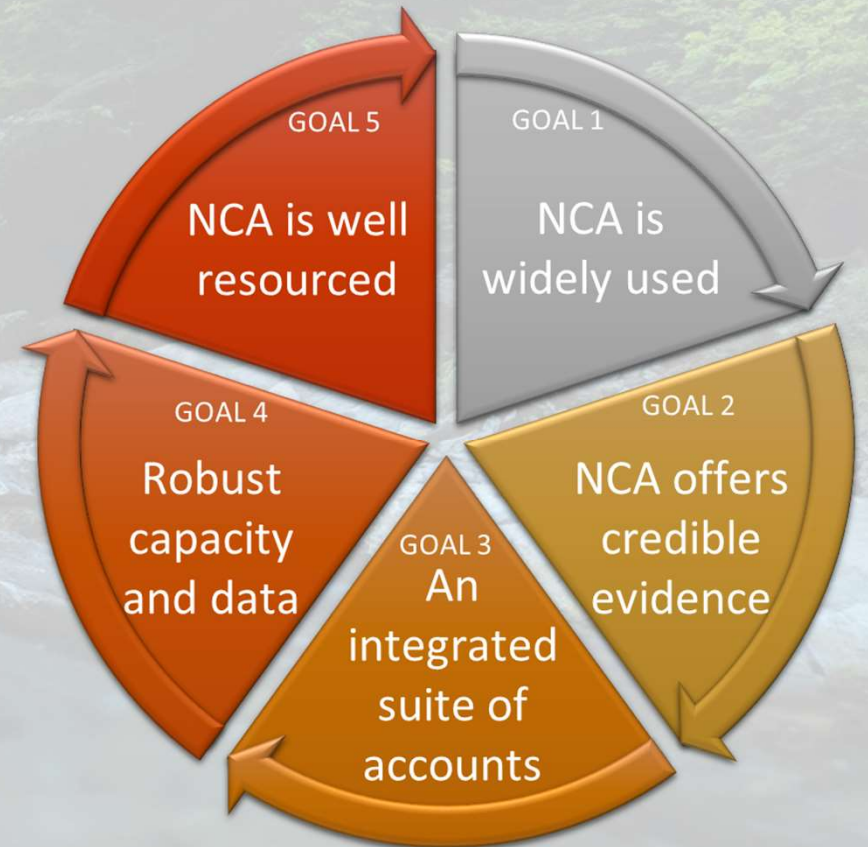


Vision:

Natural capital accounting is widely used to provide credible evidence for integrated planning and decision-making, in support of the development needs of the country



Intensive co-development process with
range of stakeholders over three years



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Stats SA Natural Capital series



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Stats SA's *Natural Capital* series

Land and Terrestrial Ecosystem Accounts, 1990 to 2014: Released in December 2020

1



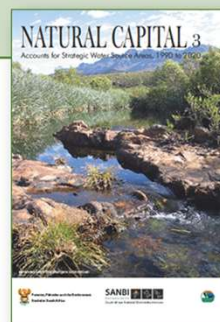
Accounts for Protected Areas, 1990 to 2020: Released in October 2021

2



Accounts for Strategic Water Source Areas, 1990 to 2020: Released in March 2023

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Sub-national Water Resource Accounts, 2015 to 2021: Released in March 2024

4



Experimental Biodiversity-Based Tourism Estimates, 2013 to 2019: Released in June 2024

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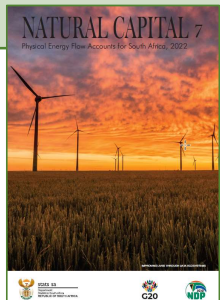
Physical Energy Flow Accounts for South Africa, 2015 to 2021: Released in March 2025

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Physical Energy Flow Accounts for South Africa, 2022: Released in November 2025

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Experimental Biodiversity- Based Tourism Estimates for South Africa



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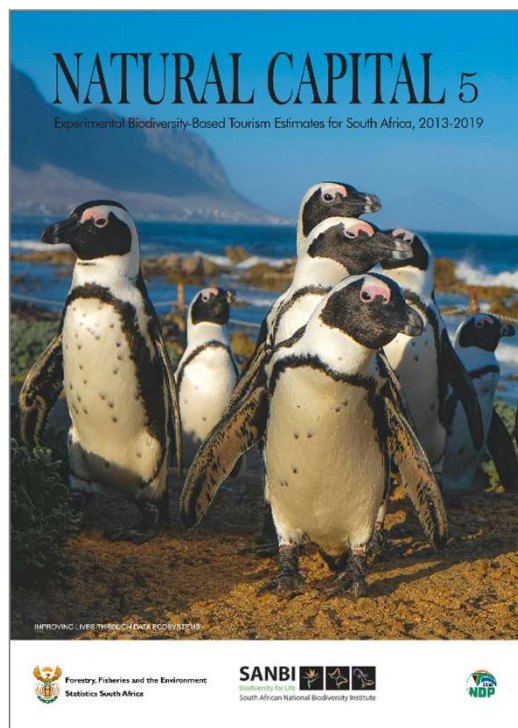
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Natural Capital series 5: Experimental Biodiversity-Based Tourism Estimates for South Africa



1. Was released on the Stats SA website (www.statssa.gov.za) on 11 July 2024.
2. Was compiled by Stats SA, but working in partnership with SANBI, DFFE, NDT and SA Tourism.
3. Provides the first estimates of biodiversity-based tourism expenditure to the South African tourism sector and the South African economy, which is directly linked to the Tourism Satellite Account (TSA) for South Africa.
4. The Experimental Biodiversity-Based Tourism Estimates build upon and expand the work previously conducted by the SANBI and Stats SA concerning biodiversity-based tourism employment, as part of the last National Biodiversity Assessment 2018 (NBA 2018).
5. It contributes to the implementation of South Africa's National Natural Capital Accounting (NCA) Strategy, which was published by Stats SA in June 2021.
6. Statistics that come from the Experimental Biodiversity-Based Tourism Estimates for South Africa, 2013 to 2019 will be used for the compilation of the first experimental BESA (biodiversity tourism sub-sector of the Biodiversity Economy)



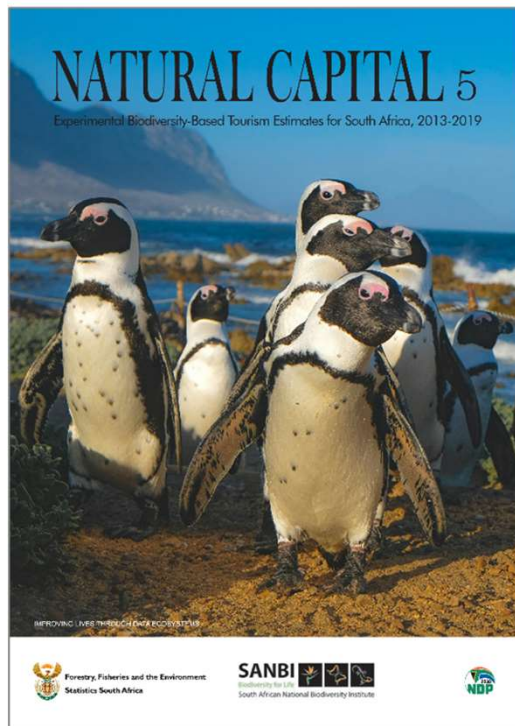
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NC Series 5: Experimental Biodiversity-Based Tourism Estimates, 2013 to 2019



Tourism

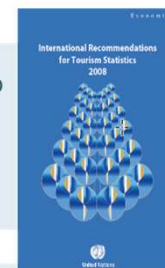
Tourism refers to the activity of visitors. A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips taken by visitors qualify as tourism trips.

Biodiversity Assets

Biodiversity is the variety of life, including the genes of individual plants or animals, the huge number of species and the different ecosystems in which they live. Biodiversity assets includes species, ecosystems and other biodiversity-related resources that generate ecosystem services, support livelihoods, and provide a foundation for economic growth, social development and human wellbeing.

Biodiversity-based tourism

Biodiversity-based tourism is tourism that involves the use or enjoyment of biodiversity assets, including trips and visits by domestic and inbound same-day visitors and tourists to partake in and experience South Africa's ecosystems and species. This includes making use of these biodiversity assets for recreational or leisure purposes. Thus biodiversity-based tourism activities occur in or with one or more natural ecosystems and/or with one or more indigenous species.



No formal definition or internationally agreed standard



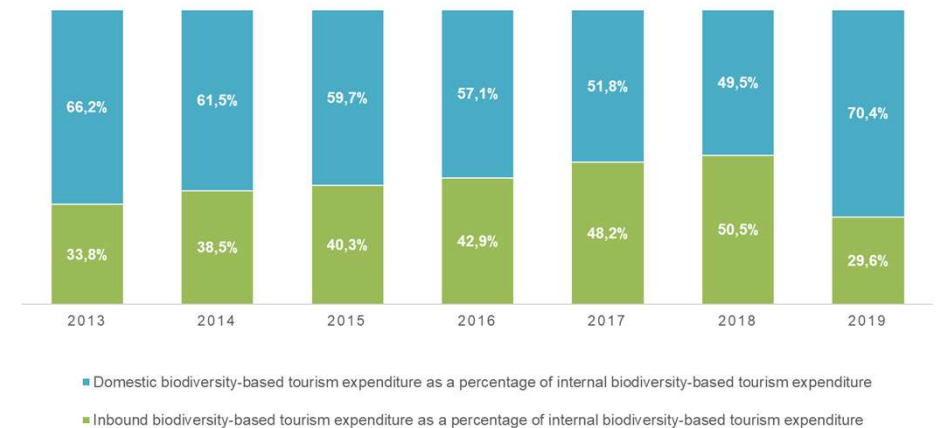
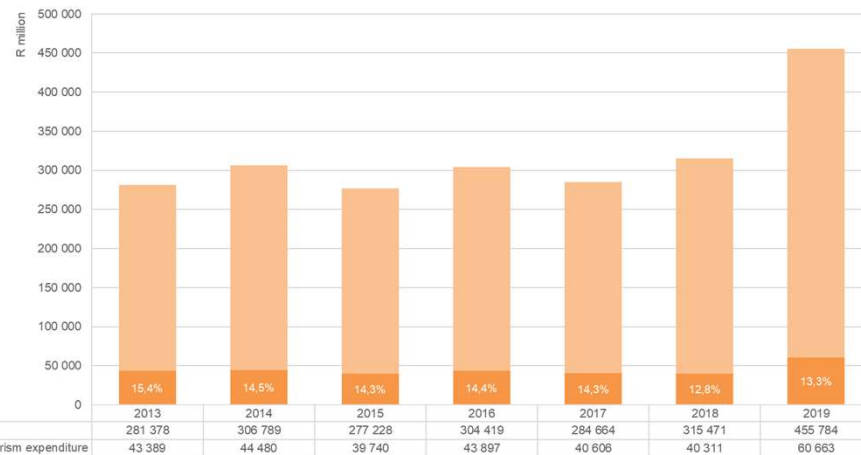
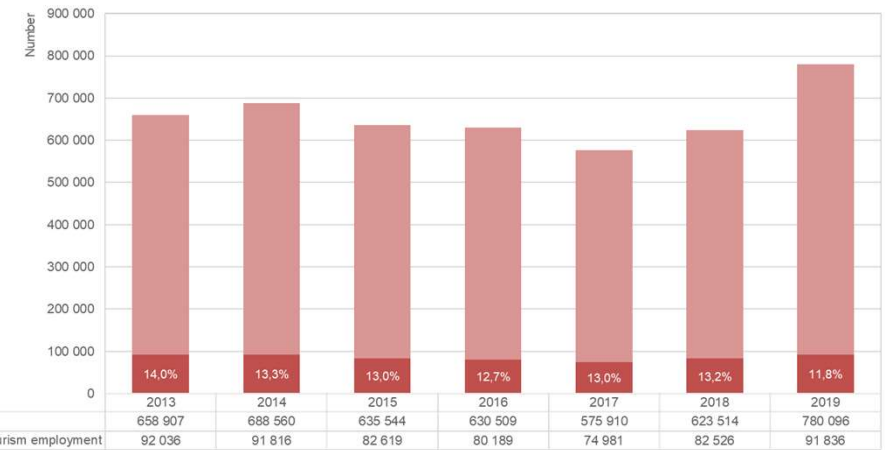
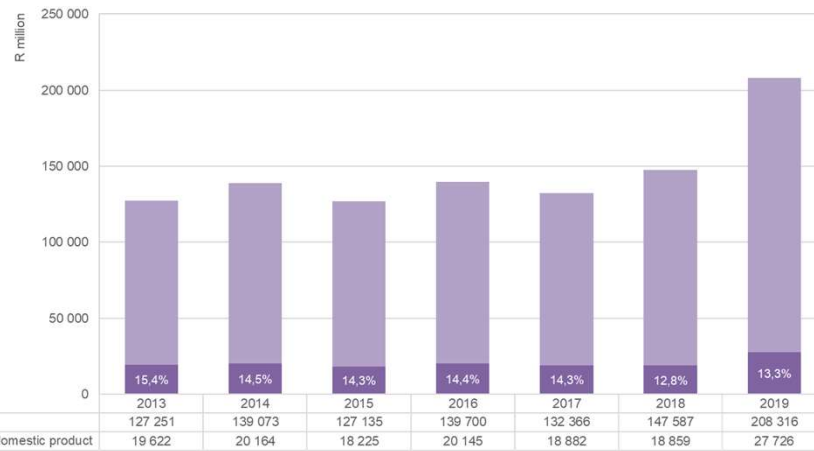
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Biodiversity-Based Tourism Estimates : economic activity, employment and spend





Experimental Biodiversity Economy Satellite Account for South Africa – in development



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Defining the Biodiversity Economy

From South Africa's **National Biodiversity Economy Strategy**:

The biodiversity economy consists of businesses and other economic activities that either ***directly depend on biodiversity*** for their core business or that ***contribute to conservation of biodiversity*** through their activities

Adapted from a definition proposed by van Paddenburg et al. 2012



Defining the biodiversity economy is not straightforward, and there is no international consensus on a definition. Not the same as *green economy* or *bioeconomy*.



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Conceptual framework for the Biodiversity Economy



Biodiversity-related economic activity

A. Conserving biodiversity
(sectors/activities that contribute directly to conserving or managing biodiversity)

A1. Protecting and managing biodiversity assets

A2. Maintaining and restoring ecological infrastructure

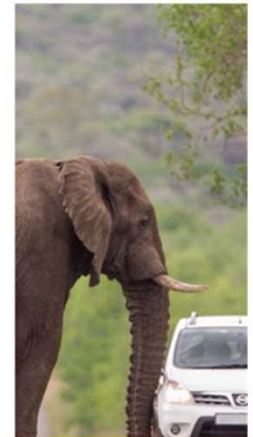
A3. Research and professional services

B. Using biodiversity
(sectors/activities that depend directly on utilising biodiversity)

B1. Non-consumptive use of biodiversity

B2. Extractive use of biodiversity

Focus is on natural or semi-natural ecosystems and indigenous species



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Why a satellite account approach for measuring the Biodiversity Economy?

- Satellite accounts:
 - Allow experimentation with new concepts and methodologies
 - Fully embedded in the traditional set of national accounts, and enable analysis of a range of economic statistics (GDP, jobs etc)
 - Stats SA have experience in satellite accounts compilation(e.g. tourism satellite account)
- There are other ways to measure the biodiversity economy (e.g. ecosystem service valuation, Green GDP) but no standardised or regularly produced approaches exist.
- The BESA is intended to complement accounts that are being produced in South Africa through the System of Environmental-Economic Accounting (SEEA) Ecosystem Accounting (EA).
- BESA will focus on ecosystems and species to activities that fall inside the SNA production boundary.



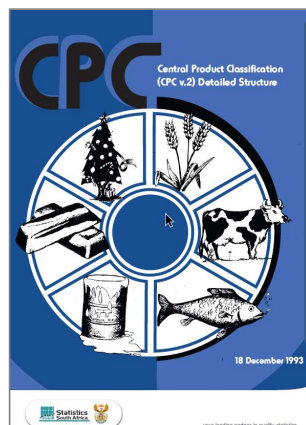
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Draft experimental BESA – where did we start?

Benchmarked
new Supply
and Use-tables
time-series –
released 25
August 2021
by Stats SA



**SUT compilation level:
118 product groupings**
SUT publication level: 108
product groupings

Scoping
workshop

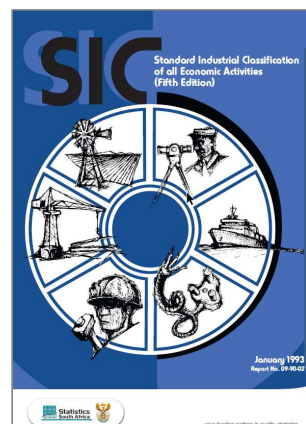
- Initial one day scoping workshop used for planning of work, identifying key stakeholders, and agreeing on adopting the conceptual framework for the biodiversity economy from the NBA.

Scoping
working
sessions

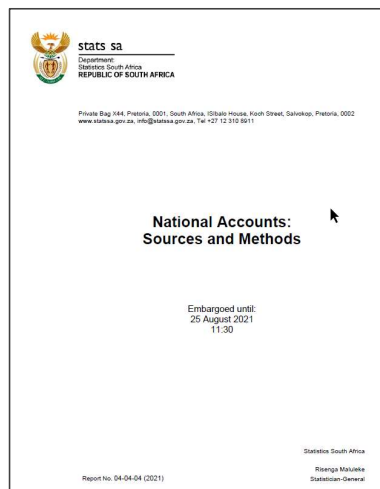
- 12 scoping work sessions with the core working group - roughly two hours per session.
- Invitations to join these sessions were extended to a broader reference group comprising subject matter experts in specific areas e.g. marine ecosystems, agriculture, forestry, biomass and others.
- Focused on linking the conceptual framework for the biodiversity economy to the industry and product classifications used for compiling South Africa's national accounts (SUTs).

Draft BESA
compilation

- DFFE provided Stats SA draft BESA scoping document (EXCEL workbook) in order to start compiling a draft BESA according to the scoping requirements provided.



**SUT compilation level:
213 industry groupings**
SUT publication level: 124
industry groupings



Biodiversity Economy industry and product scoping

Each individual industry (SIC) code and product (CPC) code was assessed in respect of five parameters:

- Inclusion within the biodiversity economy (yes or no).
- Degree of inclusion (indicated as a percentage range).
- Rationale for inclusion, with examples.
- Category and sub-category of the biodiversity economy into which it best fits.
- Areas of research for further refinement or increased certainty.

Based upon 7 principles:

1. Use the definition of the biodiversity economy, and keep coming back to it.
2. Where an activity is considered part of the biodiversity economy, no part of that activity is excluded because it has a negative environmental impact.
3. All economic activities related to indigenous species are included.
4. All economic activities that directly depend on natural ecosystems are included.
5. Non observed activities in the biodiversity economy are included (inclusive of subsistence, informal and illegal activities).
6. Activities are included even where the proportion related to biodiversity is currently estimated to be negligible.
7. Activities that may be considered to be part of the green economy more broadly but that are not directly related to biodiversity are excluded.



Draft experimental BESA, 2018 – where did we start?

Table 4: Summary of results for product codes

Proportion related to biodiversity	Number of CPC codes	% of total number of codes
All or most (>80%)	3	2.5%
Some (20-80%)	1	0.8%
Few (<20%)	35	29.7%
None	79	66.9%
Total	118	100%

Table 3: Summary of results for industry codes

Proportion related to biodiversity	Number of SIC codes	% of total number of codes
All or most (>80%)	2	0.9%
Some (20-80%)	1	0.5%
Few (<20%)	36	16.9%
None	174	81.7%
Total	213	100%

Table 8: Proposed proportions to be used to calculate the economic contribution of the industries and products identified as biodiversity-related to GDP and employment

Group to which industry/product code allocated	Proposed proportion to be used to extract data from SUTs	Alternative proportions that could be used for sensitivity testing	
		Conservative	Generous
All or most (estimate >80% related to biodiversity)	85%	80%	90%
Some (estimate 20-80% related to biodiversity)	40%	30%	50%
Few (estimate <20% related to biodiversity)	3.5%	1%	5%

3 different approaches
3 different answers



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Draft experimental BESA – where did we start?

Supply and use tables

-SUT Directorate released updated SUTs – ongoing alignment of the draft BESA to the National Accounts

BESA system development

-Draft BE SUT (automated system), based upon the SUT - and system checking.
-3 Draft BESA (proposed, conservative and generous) (automated system), based on draft BE SUT and DFFE, SANBI and Stats SA draft BESA scoping – and system checking

Initial macro indicators

-Draft BE gross value added (GVA) and gross domestic product (GDP) – 3 approaches.
-Draft BE taxes less subsidies - 3 approaches.
-Draft BE exports- 3 approaches.

BESA employment

-Ongoing engagements - how must BE employment be disaggregated – what would DFFE and SANBI want to monitor and report on for BE employment for policy.



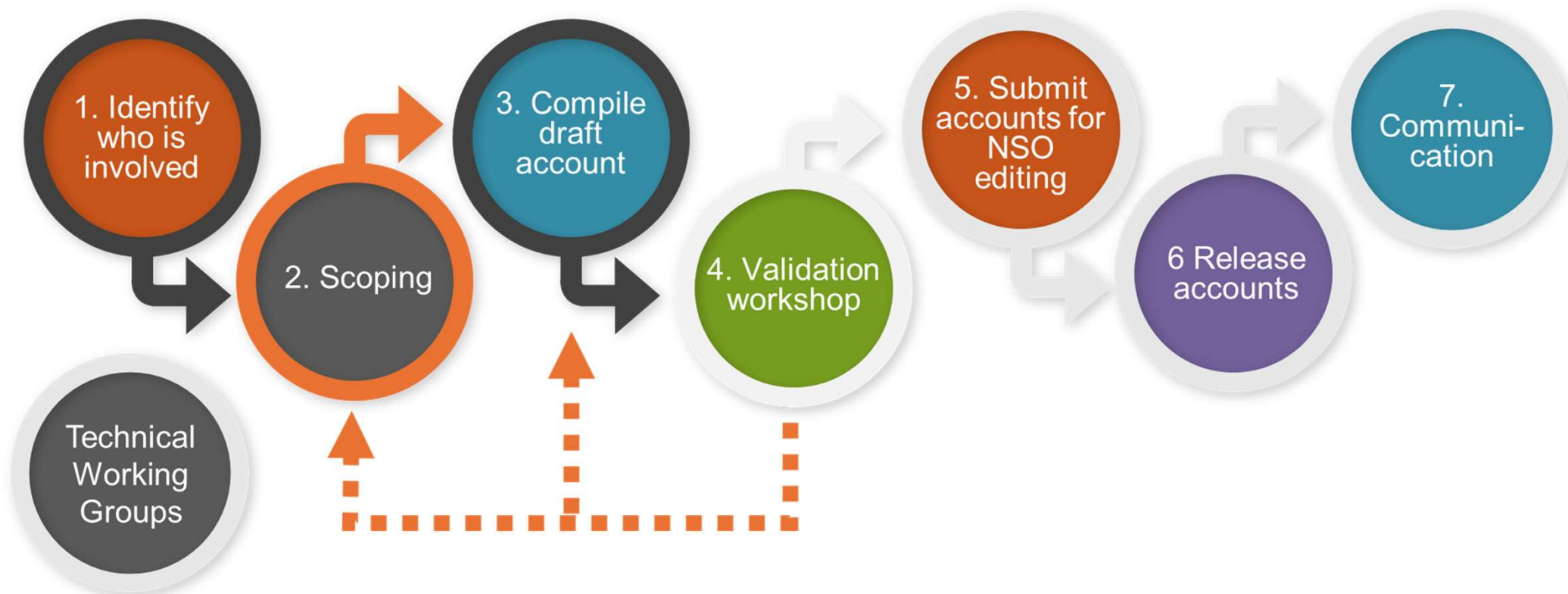
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The process for the compilation of natural capital accounts



Re-scoping exercise of the BESA industry ratios

BESA industry ratio re-scoping exercise focussed on the following, per each of the 39 identified BE industries from the SUT:

- Estimate *industry ratios* for each identified industry of the biodiversity economy.
- For each of the identified industries of the biodiversity economy, an explanation is given of the identified information sources and reasoning for the initial estimate.
- These biodiversity economy industry ratios are a *best estimate* based on the available information.
- In some cases, there is detailed industry information that allows an estimate with high certainty.
- In other cases, a reasoned estimate is made based on limited available information with less certainty.

Table 2: Descriptive terms for assessing the level of certainty in the estimates of the industry ratios.

Level of certainty	Explanation
Low	Speculative. The estimate is based on very limited evidence and large gaps remain. Significant assumptions are needed to arrive at an estimate. Accuracy is uncertain
Medium	Probable. The estimate is supported by some relevant, available evidence, although there are still some uncertainties that might affect accuracy.
High	Reliable. The estimate is backed by reasonable and consistent evidence, although minor uncertainties may still exist. Accuracy is relatively certain.

Re-scoping exercise of the BESA industry ratios

- A detailed list of BE industries was developed, using the conceptual framework for the biodiversity economy.
- The list began with a list of industries used in previous estimates of biodiversity employment.
- It was then cross-checked and added to from the *Compendium of Benefits of Biodiversity* of the National Biodiversity Assessment 2018.
- It was also cross checked with the dependencies database of the ENCORE model to identify possibly relevant dependencies that had been overlooked.
- Finally, it was checked against the list of industry classes from the Standard Industrial Classification (SIC) to identify any SIC classes that may not have been covered already.

A1: Protecting and managing biodiversity assets

National government departments (DFFE, DWS, DALRRD)

Wildlife crime prevention

Biodiversity entities (incl. SANBI, SANParks, iSimangaliso)

Provincial departments (relevant programmes)

Municipalities (relevant sections)

Conservation NGOs

A2: Restoring and maintaining ecological infrastructure

Department of Public Works - Expanded Public Works Programme

Water resource management

A3: Research and professional services related to biodiversity

Government research institutions

Research and education

Environmental assessment

Wildlife veterinarians

B1: Non-consumptive use of biodiversity

Biodiversity-based tourism

Water provision

Sports and recreation

Media and photography

Organic fertiliser

B2: Consumptive or extractive use of biodiversity

Ocean fisheries

Pollinator-dependent crops

Rangeland agriculture

Wildlife ranching, hunting and game products

Bioprospecting and biotrade

Indigenous plant trade

Traditional medicine

Industry organisations



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Re-scoping exercise of the BESA industry ratios

Draft working document

than a dependency. If the underlying natural resource, the ecosystems, reduces in condition, the spending in these industries will increase due to the increased risk (a negative relationship). This is counter to the other sub-sectors included, in which economic activities benefit from a higher condition of the underlying resource (a positive relationship).

Organic fertiliser

The SIC contains a specific class for the production of organic fertiliser such as compost (116, Table 29). It is likely that this production relies to some extent on natural micro-organisms.

Table 29: Standard Industrial Classification classes (Stats SA, 1993) related to organic fertiliser.

	Industry ratio	Confidence
Direct dependency		
116 Production of organic fertiliser	50.0	Medium

Many organic fertilisers are created through composting, which involves the breakdown of organic materials by microorganisms like bacteria and fungi. A diverse range of microbes in the compost pile accelerates the decomposition process and leads to a richer, more effective fertilizer. Often, natural micro-organisms will be relied on for the composting process, although it is possible to introduce decomposing bacteria and organisms from elsewhere. Hence, the industry is moderately dependent on biodiversity. Other types of organic fertiliser include animal manure from domestic animals. A suggested estimate is that 50.0% of the industry relies on natural micro-biodiversity.

The confidence in the estimate is medium, as there is a single SIC class related to organic fertiliser, a large proportion of which is likely to be biodiversity-relevant. Remaining research questions include:

- What portion of organic fertiliser production in South Africa involves decomposition?
- To what extent does organic fertiliser production rely on indigenous microbes?

B2: Consumptive use

Ocean fisheries

South Africa has a long coastline of more than 3 200 km and a rich marine biodiversity of more than 10 000 species.⁷⁹ There are 22 commercial fisheries in the country that produce an estimated 600 000 tonnes of fish annually.⁷⁹ Hake, Cape horse mackerel, rock lobster and small pelagic fish are the largest fisheries.⁸⁰ Indigenous wild fish stocks are a biodiversity resource, that is also highly dependent on water quality and nursery spaces.

Table 30: Standard Industrial Classification classes (Stats SA, 1993) related to ocean fisheries.

	Industry ratio	Confidence
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⁷⁹ Stats SA (2016) Environmental Economic Accounts Compendium, Statistics South Africa, Pretoria.
⁸⁰ DEFF (2023) State of the South African marine fisheries 2023. Department of Forestry, Fisheries and the Environment, Pretoria.

Draft working document

Direct dependency		
131 Fishing, operation of fish hatcheries and fish farms		
1310 Ocean and coastal fishing	100.0	High
1311 Fish hatcheries and fish farms	10.0	Low
301 Production, processing and preservation of meat, fish, fruit, vegetables, oils and fats		
3012 Processing and preserving of fish and fish products	50.0	Medium
Indirect dependency		
612 Wholesale trade in agricultural raw materials, livestock, food, beverages and tobacco		
61221 Wholesale trade in foodstuffs		
622 Retail trade in food, beverages and tobacco in specialised stores		
62209 Other retail trade in food, beverage and tobacco		

The wild harvested species are the direct resource of ocean fisheries. If fisheries collapse, so do the economic sectors that rely on them. Saltwater, wild-caught fish is highly dependent on nursery habitats and the genetic diversity of the populations⁸¹. Thus, the entire industry class for 'ocean and coastal fishing' (1310; Table 30) is considered to be dependent on biodiversity. Aquaculture farms rely far less on biodiversity as they may use exotic fish species and constructed pools, but fish farms located in the ocean or estuaries still rely on biodiversity for water quality and animal feed.⁸¹ Aquaculture remains a very small part of the fisheries sector in South Africa, contributing only 5 418 tonnes (0.8%).⁸² The remainder is wild-caught fish.

Since the fish species themselves are the product, it is fair to include the processing of fish as a direct dependency. Not all fish products sold in South Africa come from local fisheries, some are imported. But, South Africa is a net exporter of fish.⁸³ South Africa imported 149 879 tonnes of fish products in 2023 and exported 402 181 tonnes (73%).⁸⁴ This implies that of the fish used for local markets, approximately 200 000 tonnes (57.0%) are locally caught (600 000 – 402 181) and 149 879 imported (43.0%). Thus, at least 50.0% of fish processed in South Africa comes directly from wild harvesting in our oceans.

The confidence in the estimate for ocean fisheries is high, as the dependency of ocean fisheries on biodiversity is well established and a single SIC class covers all ocean fishing, so the entire class can be included. Confidence in fish farming is low, as there is little information available on the industry in South Africa to determine its dependence on indigenous fish species, food or water quality. The degree to which fish processing is based on indigenous, wild caught fish compared to imported fish is also uncertain, leading to a medium confidence in that estimate. Remaining research questions include:

- Is there any portion of ocean and coastal fishing that is not dependent on indigenous species?

⁸¹ ENCORE (2024) Exploring Natural Capital Opportunities, Risks and Exposure.

⁸² <https://encorenature.org/en>

⁸³ DAFF (2016) A profile of the South African aquaculture market value chain. Department of Agriculture, Forestry and Fisheries, Pretoria.

⁸⁴ FAO (2024) Fishery and aquaculture country profiles: South Africa. Food and Agriculture Organisation. <https://www.fao.org/fishery/en/fao/zaf>

⁸⁵ DEFF (2023) State of the South African marine fisheries 2023. Department of Forestry, Fisheries and the Environment, Pretoria.

Draft working document

- What proportion of fish processing in South Africa uses wild caught, indigenous fish from South African waters?
- To what extent are South African aquaculture farms dependent on biodiversity or ecological infrastructure?

Pollinator dependent crops

Crops at least partially pollinated by animals account for 35% of global food production.^{85, 86} This means that pollination is either essential for these crops or results in increased production. Animal pollinators are particularly important for production of fruit and vegetables. Cereals are more often wind pollinated. South Africa uses two indigenous sub-species of honeybee in addition to wild pollinators.⁸⁷ Pollinators need a variety of plants and flowers for food.

Pollinators do not get 'consumed' or used up during production of crops, hence this sub-sector does not fit perfectly within the 'extractive use' sector of the biodiversity economy, and may be more correctly included under 'non-consumptive use'. However, it is included here with other agricultural and production activities.

Table 31: Standard Industrial Classification classes (Stats SA, 1993) related to pollinator-dependent crops.

	Industry ratio	Confidence
Direct dependency		
111 Growing of crops		
1111 Growing of cereals and other crops n.e.c.	4.6	Medium
1112 Growing of vegetables, horticultural specialties and nursery products	95.0	Medium
1113 Growing of fruit, nuts, beverage and spice crops	70.0	Medium
Indirect dependency		
301 Production, processing and preservation of meat, fish, fruit, vegetables, oils and fats		
3013 Processing and preserving of fruit and vegetables		
612 Wholesale trade in agricultural raw materials, livestock, food, beverages and tobacco		
6121 Wholesale trade in agricultural raw materials and livestock		
61221 Wholesale trade in foodstuffs		
622 Retail trade in food, beverages and tobacco in specialised stores		
62201 Retail trade in fresh fruit and vegetables		

⁸⁵ Klein, A.M., Vassiere, B.E., Cane, J.H., Steffan-Dewenter, I., Cunningham, S.A., Kremen, C. & Tscharntke, T. (2007) Importance of pollinators in changing landscapes for world crops. Proceedings of the Royal Society B: Biological Sciences, 274(1608): 303–313.

⁸⁶ FAO (2019) The State of the World's Biodiversity for Food and Agriculture, J. Bélanger & D. Pilling (eds.). FAO Commission on Genetic Resources for Food and Agriculture Assessments. Rome. 572 pp. <http://www.fao.org/3/CA3128EN/CA3128EN.pdf>

⁸⁷ SANBI (2019) National Biodiversity Assessment 2018 Supplementary Material: Compendium of South African Biodiversity. Compiled by Sarah L. Davis. South African National Biodiversity Institute.



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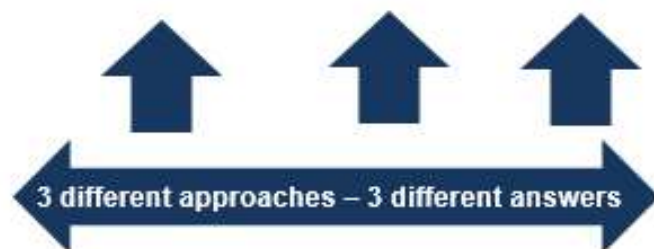
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Experimental BESA compilation system development in progress

Table 8. Proposed proportions to be used to calculate the economic contribution of the industries and products identified as biodiversity-related to GDP and employment

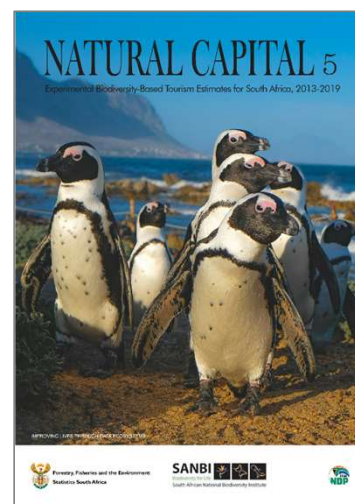
Group to which industry/product code allocated	Proposed proportion to be used to extract data from SUTs	Alternative proportions that could be used for sensitivity testing	
		Conservative	Generous
All or most (estimate >80,0% related to biodiversity)	85,0%	80,0%	90,0%
Some (estimate 20,0-80,0% related to biodiversity)	40,0%	30,0%	50,0%
Few (estimate <20,0% related to biodiversity)	3,5%	1,0%	5,0%

Source: Diner et al, 2021.



Biodiversity economy - industry ratio estimates - working document

ONE agreed upon approach and ONE answer!



Biodiversity-related economic activity

A. Conserving biodiversity
(sectors/activities that contribute directly to conserving or managing biodiversity)

A1. Protecting and managing biodiversity assets

A2. Maintaining and restoring ecological infrastructure

A3. Research and professional services

B. Using biodiversity
(sectors/activities that depend directly on utilising biodiversity)

B1. Non-consumptive use of biodiversity

B2. Extractive use of biodiversity

Focus is on natural or semi-natural ecosystems and indigenous species

Way forward (work in progress) – experimental BESA for South Africa

Stats SA recompiling the draft BESA and applying the new BE industry ratio's for a next version of the draft BESA for SA

DFFE, SANBI and Stats SA further engaging on the development of the BE product ratios re-scoping – similar process the BE industry ratio re-scoping

DFFE, SANBI and Stats SA further engaging on the labour market related variables which are relevant for the biodiversity economy.

Decisions on the inclusion of more detailed employment data will depend on the labour market issues that are considered of special significance for policy and research by DFFE and SANBI for the biodiversity economy.

Aim is to release the first experimental BESA for South Africa in the Stats SA NC series by latest November 2028



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IMPROVING LIVES THROUGH DATA ECOSYSTEMS





Key lessons and take home message



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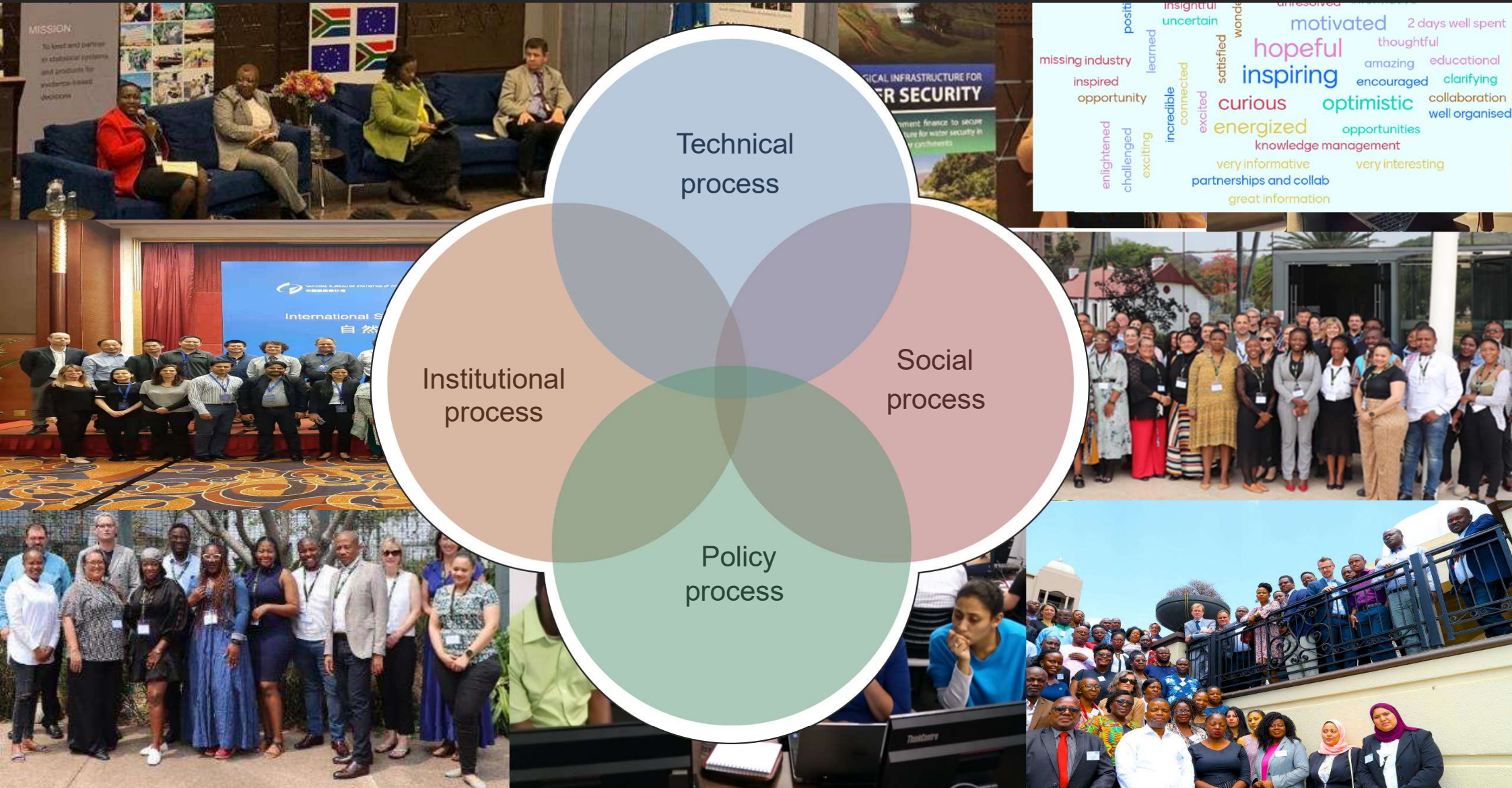
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South African National Biodiversity Institute

Putting attention to process makes a difference to impact



inspiring

hopeful

motivated

energetic

curious

optimistic

insightful

wonderful

amazing

educational

clarifying

collaboration

well organised

opportunities

knowledge management

very informative

partnerships and collab

great information

very interesting

enlightened

challenged

exciting

incredible

connected

excited

satisfied

missing industry

inspired opportunity

learned

positive

uncertain

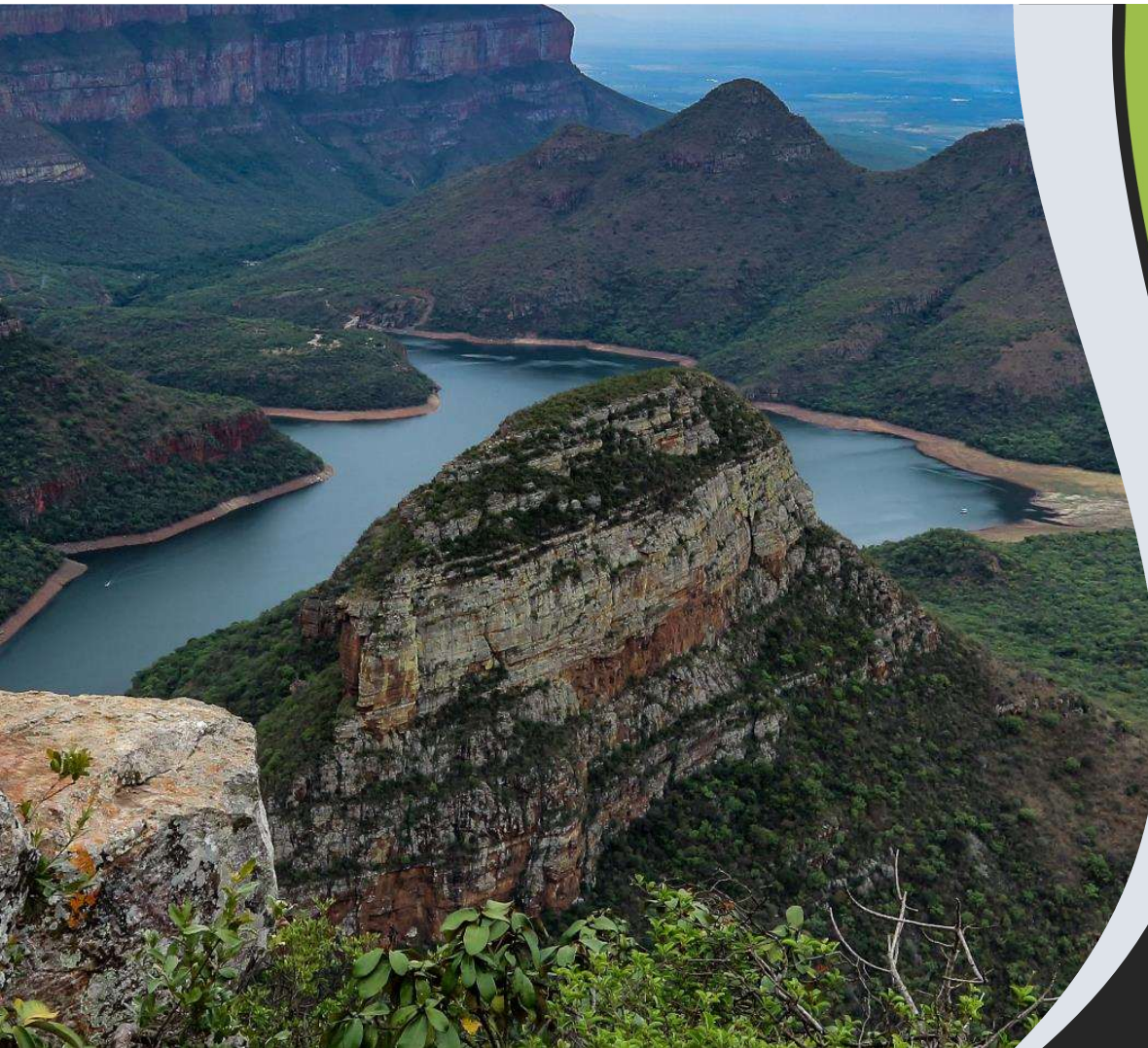
wonder

unresolved

thoughtful

encouraged

2 days well spent



Thank you



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