

15th November 2024

TO WHOM IT MAY CONCERN

REQUEST FOR A QUOTATION FOR THE 2025 naamsa TRADE DATA PROJECTS

You are hereby invited to provide a quotation for the two 2025 **naamsa** Trade Data projects for purposes of the 2025 Automotive Trade Manual publication as well as the Product Market Matrix 2020 to 2024.

The Automotive Trade Manual – South Africa is an annual publication now produced and compiled by **naamsa** | The Automotive Business Council – the acknowledged source of South African automotive trade data. Accuracy relating to the processing of the relevant trade data and research requirements are therefore imperative and the responsibility of the service provider. The publication is regarded as the iconic national publication to promote the South African automotive industry's world class capabilities to a national and international audience. The publication provides a comprehensive overview of the export and import performance of the South African automotive industry under the Automotive Production Development Programme (APDP) and APDP Phase 2 (APDP2). Among the topics covered in the Manual are the top automotive export destinations, the major countries of origin, the main export trade blocks, the top automotive products being exported and imported, as well as the top growth markets and products. The Manual further explores the impact of the trade arrangements enjoyed by South Africa in the trade of vehicles and related automotive components.

The eligible automotive products identifiable under the APDP and APDP2, based on very specific Customs and Excise tariff codes, comprise approximate 600 tariff lines, prioritises the 150+ export destinations and 70+ countries of origin, identifies growth products and growth markets, analysis the impact of the trade arrangements on the industry's export performance, and track the progress of the APDP and APDP2 for government and industry purposes. The annual publication is widely distributed nationally and international and in addition to website access, in the order of one million electronic

copies are distributed annually to an international clientele base via various avenues. The publication has a life span of at least one year and is extensively used as a reference document by decision-makers and analysts.

The focus of the 2025 projects will be to capture the detailed, updated monthly Customs statistical data and information for the automotive products eligible in terms of the APDP. Please note that programming skills are required for these projects to process the large amounts of raw data which entails a time-consuming exercise involving a few hundred hours to process and subsequently analyse the Customs data in the required user-friendly format. The 2025 trade data projects need to cover the following:

1. Trade data project for purposes of the 2025 Automotive Trade Manual publication:
 - obtaining, processing and analysis of detailed updated monthly Customs and Excise trade statistics of products eligible under the Automotive Production Development Programme (APDP) and APDP2 (guidelines would be provided) for the full year 2024 in Excel spread sheets to be converted into user friendly tables and graphs which would include the following;
 - Purchasing and obtaining the monthly 2024 Customs and Excise trade data from SARS for the approximate 600 eligible APDP eight-digit tariff subheadings ranging from Chapters 39 to 98;
 - Processing of the monthly Customs and Excise trade data for the approximate 600 eight-digit tariff subheadings ranging from Chapters 39 to 98 into annual figures;
 - Identifying and processing annual detailed exports values to the relevant 263 export country destinations listed by SARS for eligible APDP/APDP2 vehicles and the 33 eligible APDP/APDP2 component categories to the export level of R1 million per annum;
 - Identifying and processing of the top 10 eligible APDP/APDP2 component categories by country for those countries with an export value above R100 million;
 - Identifying and processing of the top five destinations for each of the eligible APDP/APDP2 automotive component categories;
 - Identifying and processing annual detailed import values from the relevant 263 countries of origin for eligible APDP/apdp2 vehicles and the 33 eligible APDP/APDP2 component categories;

- Identifying and processing annual detailed export values for the following regions – European Union, Africa, Southern African Development Community (SADC), United States-Mexico-Canada Agreement region (USMCA) and the Common Market of South America (Mercosur);
- Identifying and processing annual detailed import values for the following regions – European Union, Africa, Southern African Development Community (SADC), United States-Mexico-Canada Agreement region (USMCA) and the Common Market of South America (Mercosur);
- Processing of Botswana, eSwatini, Lesotho and Namibia (BELN) export values for eligible APDP vehicles and the eligible 33 eligible component categories separately in order to provide export values to Africa and SADC with BELN country data and without BELN country data;
- Processing of the European Free Trade Association (EFTA) (Iceland, Liechtenstein, Norway and Switzerland) eligible APDP vehicles and component export data;
- Identifying and processing annual detailed import values for the original equipment component imports under Chapter 98 by country of origin;
- Processing of a detailed breakdown and analysis of the South African automotive industry's trade balance for 2024 based on an APDP/APDP2 calculation as well as a broader calculation, including aftermarket component imports (guidelines will be provided);
- Identifying and processing of the South African automotive industry's top 10 trading partners;
- Analysis of the import and export trends and the impact of South Africa's various trade arrangements on the domestic automotive industry;
- Contribute with desk top research on current developments in the South African automotive industry;
- Contribute with desk top research of current developments in the global automotive industry;
- Provide historic trends since 1995 to 2024 for vehicle export volumes and values, automotive component exports, automotive component imports, vehicle production, vehicle imports and vehicle sales;
- Graphic design, formatting and layout of the publication in print ready format;
- Providing of high-resolution images, photographs and graphs and ensure copyright;

- Professional language editing;
- Proof reading of final document;
- The appointed service provider will be responsible to obtain an ISBN registration number for the 2025 Automotive Trade Manual publication;
- The appointed service provider will be responsible to facilitate with the advertisers in the publication with regards to the payment of the adverts and any specific design requirements for printing purposes;
- In case of hard copies printed, the appointed service provider will be responsible to ensure delivery and distribution of the hard copies to public libraries in the country as well as the deliveries to the advertisers, the AIEC, Embassies and other relevant stakeholders in Gauteng, KZN and the Eastern Cape;
- Time frame for project – commencing 1 December 2024 for completion by 15 April 2025.

Deliverable	Action description	Total (costing – as much detail as possible)
2025 Trade data project (Export Manual 2024)	<ul style="list-style-type: none"> - Obtaining, processing and compilation of detailed eligible APDP 2024 Customs statistics and analyses as outlined - Desk top research on national and international automotive trends - Graphic design/formatting/outlay/programming - Obtain copyright for high resolution images/photographs/graphs - Professional language editing - Proof reading - Delivery of print ready A4 report 	
Total		

2. Trade data project for purposes of the Product Market Matrix 2020 to 2024 as a supplementary to and extension of the first project.

The aim of the Product/ Market Matrix 2020 - 2024 as a much more detailed supplementary to the Automotive Trade Manual publication is to identify further export opportunities for the South African automotive industry based on a detailed analysis of growth products and growth markets over a five-year period. The detailed product/market matrix will cover the export ranking value by product category for the 31 identified component categories in order to identify growth markets and for 2020 – 2024 for the automotive component export value an detailed ranking by country for all vehicles and component categories for the approximately 80 countries for the threshold above R10 million in order to identify growth products as well as for each component category product for the top 10 export destinations. Vehicle export details from South Africa to all the countries as well as details for export destinations such as left- or hand-hand drive, new vehicle sales, vehicle parc and vehicle motorisation rate would be included.

- obtaining, processing and analysis of detailed updated monthly Customs and Excise trade statistics of products eligible under the Automotive Production Development Programme (APDP) and APDP2 (guidelines would be provided) for the five years from 2020 to 2024 in Excel spread sheets to be converted into user friendly tables and graphs which would include the following;
 - Purchasing and obtaining the monthly 2020 to 2024 Customs and Excise trade data from SARS for the approximate 600 eligible APDP eight-digit tariff subheadings ranging from Chapters 39 to 98;
 - Processing of the monthly 2020 to 2024 Customs and Excise trade data for the approximate 600 eight-digit tariff subheadings ranging from Chapters 39 to 98 into annual figures;
 - Identifying and processing the eligible APDP/APDP2 vehicle and component categories by country for those countries with an export value above R10 million;
 - Identifying and processing of the top 10 destinations for each of the eligible APDP/APDP2 automotive component categories;
 - Identifying growth markets for the eligible APDP/apdp2 component categories in those instances for which there was an increase of 5 percentage points or more between 2020 and 2024;

- Identifying growth in eligible APDP/APDP2 vehicles and component categories to countries in those instances for which the export values have doubled between 2020 and 2024;
- Contributing with desk top research on automotive country features such as right- or left-hand drive country, 2024 global vehicle production and vehicle sales, amongst others;
- Graphic design, formatting and outlay of the publication in print ready format;
- Providing of high-resolution images and graphs;
- Proof reading of final document;
- Time frame for project – commencing 15 April 2025 for completion by 30 June 2025.

Deliverable	Action description	Total (costing – as much detail as possible)
2024 Trade data project (Product Market Matrix 2019 – 2023)	<ul style="list-style-type: none"> - Obtaining, processing and compilation of detailed monthly eligible APDP Customs statistics for 2020 to 2024 and analyses - Desk top research on national and international automotive trends - Graphic design/formatting/outlay/programming - Obtain copyright for high resolution images/photographs - Proof reading - Delivery of print ready A4 report 	
Total		

The payment for both projects would be based on a 50% upfront payment once the NDA and the SLA have been signed and a 50% payment at completion of the project. **naamsa** will coordinate both projects and provide support where applicable. The essence of the projects is to accurately produce updated APDP/APDP2 eligible detailed trade data to explore and diversify further export opportunities

for the export-oriented South African automotive industry as well as to promote its world class capabilities to an international audience.

Please provide **naamsa** with quotations for both projects by Friday, 29 November 2024, which should include a detailed cost breakdown as well as a confirmation of the timeframe of the delivery stages of the 2025 trade data projects as per the requirements set out above.

For any further information please contact Dr Norman Lamprecht at Tel 082 829 1692 or E-mail: norman@naamsa.co.za.

Yours sincerely

A handwritten signature in black ink, appearing to read 'N. Lamprecht', written in a cursive style.

Dr Norman Lamprecht

Chief Trade and Research Officer