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Trade Performance Monitoring Review of the agricultural sector of South Africa 2024:

regional trade agreements and regions of interest

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Introduction

The Trade Performance Monitoring Review follows a new approach that gives a fresh perspective on monitoring the historical trade performance of the country and regional trade agreements. In addition to analysing trade performance of the free trade agreements, geographic regions and geopolitical formations of importance were also included. The review analysed and compared historical trade flows, market shares and growth rates for the calendar year 2024 compared to 2023. Current average tariff rates were added as indicators of the openness of the current markets. Results illustrate regional performance in terms of compound average growth rate and linear trend growth on the trade balance over the past five years.

South Africa's trade performance was monitored within six trade groupings, namely: the African countries (AfCFTA)[1], the SADC-Free Trade Area[2] (SADC-FTA), "Africa, excluding SADC-FTA" (separating the new African countries within the AfCFTA with which South Africa has an agreement), the European Union (SADC-EU EPA), the United Kingdom (SACU-M-UK EPA), MERCOSUR (SACU-MERCOSUR) and the EFTA member states (SACU-EFTA). The USA was analysed to monitor the effects of the preferential market access from the AGOA Act until 2024. In addition, two geographic regions, namely, Asia and the GCC (Gulf states of the Middle East), were included in the analysis due to the renewed interest as potential export diversification growth areas, especially from a private sector perspective. Asian markets are especially important export priorities for the fresh produce industry, such as fruit exports to Asia and meat product exports to the Middle East. The extended BRIC plus members were included due to their increasing importance in geo-politics and as potential trade partners for South Africa. There are no existing trade agreements with the latter regional groupings of interest. Therefore, trade took place at Most Favoured Nation (MFN) tariff rates except for developed countries such as Russia, Japan and South Korea, where South Africa may have lower tariffs because of the Generalised System of Preferences (GSP).

Agricultural products were defined as primary and processed as defined in Article 2, Annex 1 of the World Trade Organisation (WTO) Agreement on Agriculture. Data was sourced from the South African Revenue Services (SARS) through Trade Research Advisory. Trade Advisory provided the data and data processing in the current format. This monitoring approach provides a regional graphic overview from a bird's bird's-eye view perspective. It shows enough detail by regional agreement or regional grouping to define South Africa's international commercial and economic interests by regional grouping and product grouping. Historical trade performance indicators reveal where South Africa's growth prospects originated from and the strategically important trade partners and industries.

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[1] AfCFTA is the Africa Continental Free Trade Area

[2] SADC-12: This grouping includes the SADC FTA countries, excluding South Africa, that are part of the Protocol on Trade (FTA). They include Botswana, Eswatini, Lesotho, Namibia, Zimbabwe, Zambia, Mauritius, Seychelles, Mozambique, Malawi, Madagascar and Tanzania.

South Africa's annual agricultural trade flows overview

Figure 1 illustrates an overview of South Africa's overall agricultural trade performance over a five-year period (2019-2024).

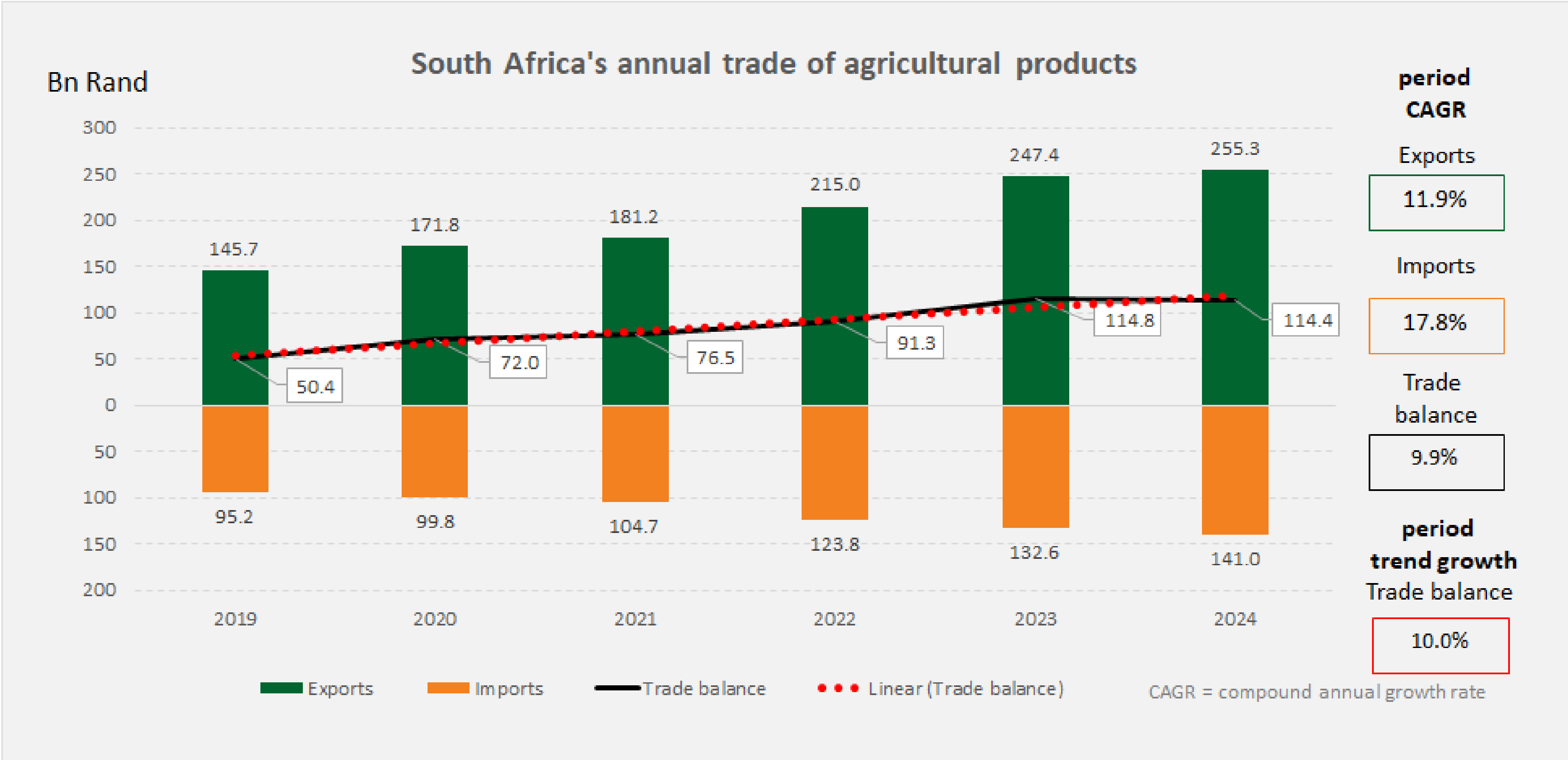

Figure 1: Annual series of South Africa's agricultural trade flows (2019 to 2024) in billion Rand
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

The upward trend in export values from around R146 billion in 2019 to R255 billion in 2024 (12% growth rate) was a central theme, accompanied by a corresponding expansion in the trade balance, which grew from R50 billion to R114 billion. In terms of the compound average growth rate, the trade balance increased by 10% while trend growth showed similar growth patterns of 10% on a year-on-year basis. This steady growth not only reflected a strengthening export sector but also that South Africa's efforts to boost its agricultural competitiveness are yielding results. Imports increased by 18% which may be an indication of an increasing demand over time. Periods of acceleration and moderate fluctuations in these figures provide useful context for interpreting subsequent trends in product-specific and region-specific trade data.

Summarised export performance analysis of South Africa's agricultural products by trade agreement or regional group

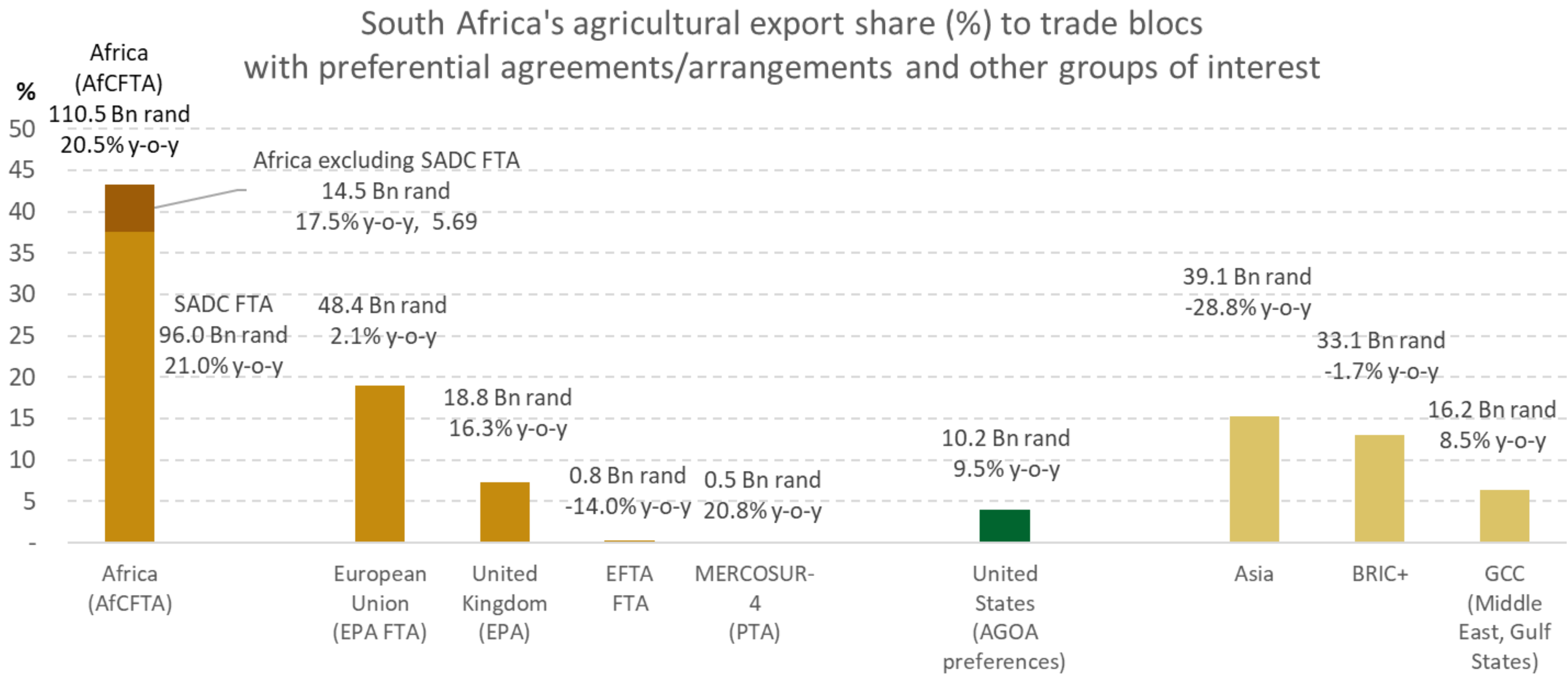

Figure 2: Agricultural product exports share (2024) to preferential trade agreements partners and other groups of interest
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

In Figure 2 and Table 1, the export shares and values for 2024, as well as growth, were broken down by regional destination, highlighting the impact of preferential trade agreements.

Table 1: Agricultural product exports share to preferential trade agreements partners and other groups of interest

South Africa's exports to	Values (Bn Rand) 2023	Values (Bn Rand) 2024	% Share of exports by value in 2024	% growth from 2023 to 2024	Top 3 product groups exported to the blocs/regions/markets (2HS)
World	**247.45**	**255.34**	***100.0***	***3.2***	
BLOCS / Regions sub-total*	**210.30**	**215.55**	***84.4***	***2.5***	
Governed by preferential trade agreements	**156.54**	**178.95**	***70.1***	***14.3***	
**Preferential Agreements - Trading BLOCS / Regions ** **					
Africa (AfCFTA)	**91.70**	**110.52**	***43.3***	***20.5***	1) Cereals 2) Beverages, spirits and vinegar 3) Miscellaneous edible preparations
SADC FTA	*79.34*	*96.00*	*37.6*	*21.0*	1) Cereals 2) Beverages, spirits and vinegar 3) Miscellaneous edible preparations
Africa, excluding SADC FTA	*12.35*	*14.52*	*5.7*	*17.5*	1) Edible fruits and nuts 2) Beverages, spirits and vinegar 3) Miscellaneous edible preparations
European Union (EU EPA)	**47.41**	**48.41**	***19.0***	***2.1***	1) Edible fruits and nuts 2) Beverages, spirits and vinegar 3) Preparations of plants (vegetables, fruit, nuts or other parts)
United Kingdom (UK EPA)	**16.13**	**18.76**	***7.3***	***16.3***	1) Edible fruits and nuts 2) Beverages, spirits and vinegar 3) Sugars and sugar confectionery
EFTA FTA	**0.92**	**0.79**	***0.3***	***-14.0***	1) Edible fruits and nuts 2) Beverages, spirits and vinegar 3) Preparations of plants (vegetables, fruit, nuts or other parts)
MERCOSUR-4 (PTA)	**0.39**	**0.47**	***0.2***	***20.8***	1) Beverages, spirits and vinegar 2) Oil seeds, oleaginous fruits miscellaneous grains 3) Organic chemicals
Groupings & countries of interest					
United States (AGOA)	**9.31**	**10.20**	***4.0***	***9.5***	1) Edible fruits and nuts 2) Preparations of plants (vegetables, fruit, nuts or

South Africa's exports to	Values (Bn Rand) 2023	Values (Bn Rand) 2024	% Share of exports by value in 2024	% growth from 2023 to 2024	Top 3 product groups exported to the blocs/regions/markets (2HS)
					other parts) 3) Beverages, spirits and vinegar
Asia (Geographical)	**54.92**	**39.11**	***15.3***	***-28.8***	1) Edible fruits and nuts 2) Cereals 3) Oil seeds, oleaginous fruits miscellaneous grains
BRIC+ (new extended BRICS)	**33.68**	**33.13**	***13.0***	***-1.7***	1) Edible fruits and nuts 2) Wool and other animal hairs 3) Beverages, spirits and vinegar
GCC (Gulf States)	**14.97**	**16.25**	***6.4***	***8.5***	1) Edible fruits and nuts 2) Meat and edible meat offal 3) Beverages, spirits and vinegar

Table notes:
South Africa's agricultural trade flow from 2023 to 2024 in billion Rand, South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory].
** Notes: Exports include re-exports, totals including BELN flows, total of all partners belonging to a bloc (no duplication)*
*** BLOCS / Regions sub-total includes duplication, since some countries belong to more than one grouping (e.g. SADC FTA and AfCFTA)*
BRIC+ (includes Egypt, Ethiopia, Indonesia, Iran, United Arab Emirates). Saudi Arabia was added in anticipation of joining soon.

Exports to the world increased modestly from R247 billion to R255 billion, a rise of 3%. Exports under preferential trade increased by 14% from R157 billion to R179 billion and making up 70% of 2024 exports. The Africa AfCFTA exports grew by 21% (from R92 bn to R111 bn), and the SADC FTA by 21% (from R79 bn to R96 bn). Preferential trade in the region favourably contributed to export expansion. Overall, exports to Asian countries decreased by 29% while exports to EFTA decreased by 14%. The main product categories in the export basket across all regions mostly consist of: Cereals, beverages, miscellaneous edible preparations, fruits and nuts, plant preparations, sugars, oil seeds, organic chemicals, wool and meat products.

Summarised import trends for South Africa on agricultural products

This graph illustrates the composition of South Africa's agricultural imports by source region in 2024.

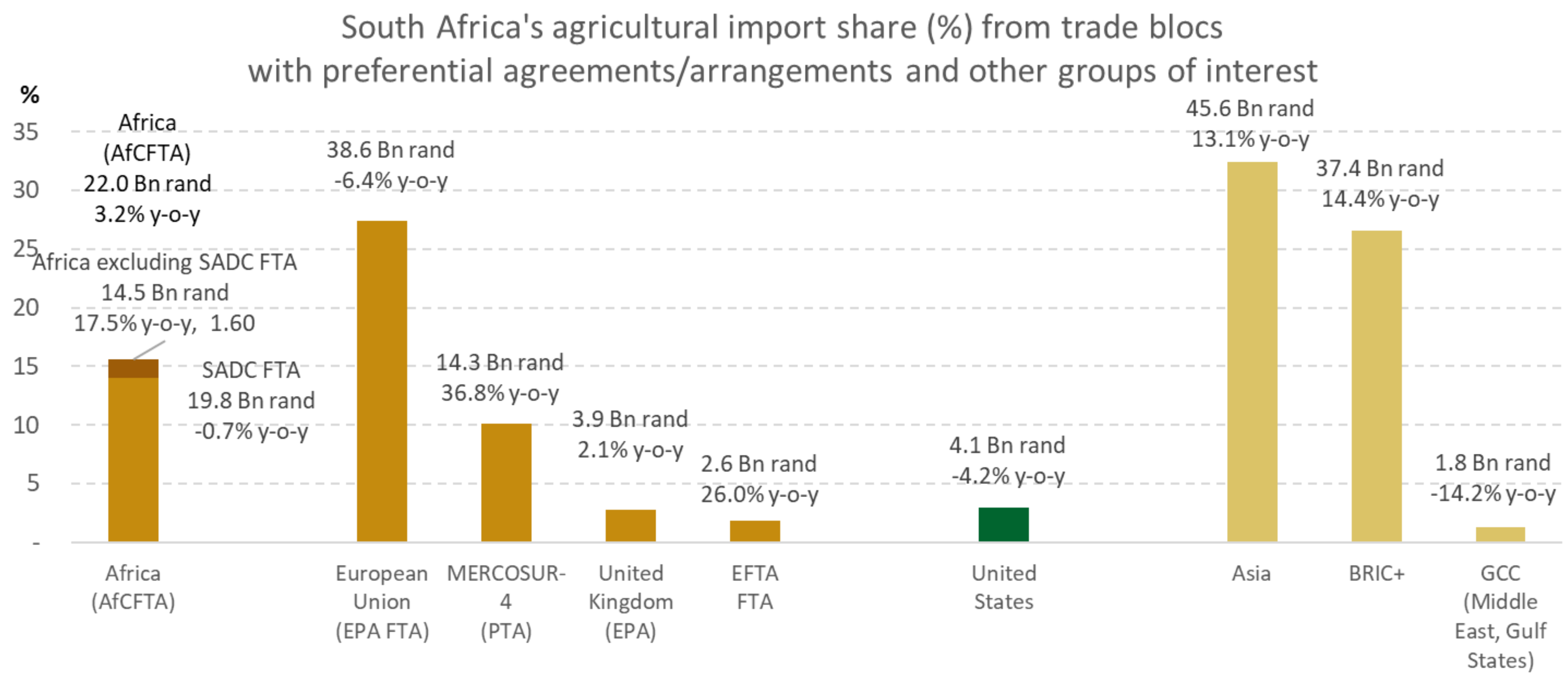

Figure 3: Agricultural product imports share (2024) from preferential agreement partners, other interest groups and specific countries summarised
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Figure 3 and Table 2 show that imports from the world amounted to approximately R141 billion. The visual emphasis on the European Union, Africa, and selected emerging markets of Asia and BRIC provides context for understanding how South Africa balances its imports; a diverse portfolio that plays an important role in domestic processing and food security.

Table 2: Agricultural product imports from preferential agreement partners and other interest groups summarised

South Africa's imports from	Values (Bn Rand) 2023	Values (Bn Rand) 2024	% Share of total exports by value in 2024	% growth from 2023 to 2024	Top 3 product groups imported from the blocs (2HS)
World	**132,60**	**140,98**	***100,0***	***6,3***	
BLOCS / Regions sub-total*	**117,47**	**124,87**	***88,6***	***6,3***	
Governed by preferential trade agreements	**78,90**	**81,39**	***57,7***	***3,2***	
Preferential Agreements - Trading BLOCS / Regions **					
Africa (AfCFTA)	**21,33**	**22,01**	***15,6***	***3,2***	1) Sugars and sugar confectionery 2) Live animals 3) Edible fruits and nuts
SADC FTA	*19,90*	*19,76*	*14,0*	*-0,7*	1) Sugars and sugar confectionery 2) Live animals 3) Edible fruits and nuts
Africa excluding SADC FTA	*1,43*	*2,25*	*1,6*	*57,5*	1) Coffee, tea, mate and spices 2) Edible fruits and nuts 3) Cocoa and cocoa preparations
European Union (EPA FTA)	**41,21**	**38,57**	***27,4***	***-6,4***	1) Beverages, spirits and vinegar 2) Cereals 3) Miscellaneous edible preparations
MERCOSUR-4	**10,43**	**14,27**	***10,1***	***36,8***	1) Meat and edible meat offal 2) Cereals 3) Residues and waste from the food industries; prepared animal fodder
United Kingdom	**3,84**	**3,92**	***2,8***	***2,1***	1) Beverages, spirits and vinegar 2) Miscellaneous edible preparations 3) Products from cereals, flour, starch, milk & pastry
EFTA	**2,08**	**2,62**	***1,9***	***26,0***	1) Tobacco and manufactured tobacco substitutes 2) Beverages, spirits and vinegar 3) Miscellaneous edible preparations
Groupings & countries of interest					
United States	**4,33**	**4,14**	***2,9***	***-4,2***	1) Meat and edible meat offal 2) Miscellaneous edible preparations 3) Beverages, spirits and vinegar

South Africa's imports from	Values (Bn Rand) 2023	Values (Bn Rand) 2024	% Share of total exports by value in 2024	% growth from 2023 to 2024	Top 3 product groups imported from the blocs (2HS)
Asia	**40,37**	**45,65**	***32,4***	***13,1***	1) Cereals 2) Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal/veg wax 3) Preparations of plants (vegetables, fruit, nuts or other parts)
BRIC+	**32,29**	**37,17**	***26,6***	***14,4***	1) Cereals 2) Meat and edible meat offal 3) Preparations of plants (vegetables, fruit, nuts or other parts)
GCC	**2,04**	**1,75**	***1,2***	***-14,2***	1) Organic chemicals 2) Beverages, spirits and vinegar 3) Products from cereals, flour, starch, milk & pastry

Table notes:

South Africa’s agricultural trade flows from 2023 to 2024 in billion Rand, South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory].

** Notes: Exports include re-exports, totals including BELN flows, total of all partners belonging to a bloc (no duplication)*

*** BLOCS / Regions sub-total includes duplication, since some countries belong to more than one grouping (e.g. SADC FTA and AfCFTA)*

BRIC+ (includes Egypt, Ethiopia, Indonesia, Iran, and the United Arab Emirates).

South Africa’s imports from the World grew by 7%, increasing from R133 billion to R141 billion. Monitored blocs/regions covered in this report accounted for 89% (R125 billion) of total agricultural imports. Trading partners under preferential agreements supplied 58% (R81 billion), growing more slowly than overall imports. Imports from Asia emerged as the largest source region with a 32% share (R46 billion), showing strong growth of 13%. Some of the top import product categories were Cereals, Animal or vegetable fats and oils, and Preparations of plants. Among preferential regions, imports from Africa excluding SADC-FTA increased the most by 58%, followed by MERCOSUR-4 and EFTA with 37% and 26% increases, respectively. Imports from Asia and BRIC+ increased by 13% and 14% respectively, while imports from GCC and USA decreased by 14% and 4% respectively.

Monitoring of trade performance by preferential trade agreements

Historical trade performance for each regional trade agreement or country-specific trade agreement was analysed. The analysis provides a view on the overall 5-year compound average annual growth for exports, imports and the resulting trade balance, as well as the linear trend-growth for the trade balance. Supporting tables provide an overview for 2023 and 2024 of the top 10 products, market share per product, trade values and growth from 2023 to 2024. Average ad valorem tariff rate estimates are indicated in square brackets to provide the measure of tariff barriers as an indicator of openness under these agreements.

Africa (AfCFTA)

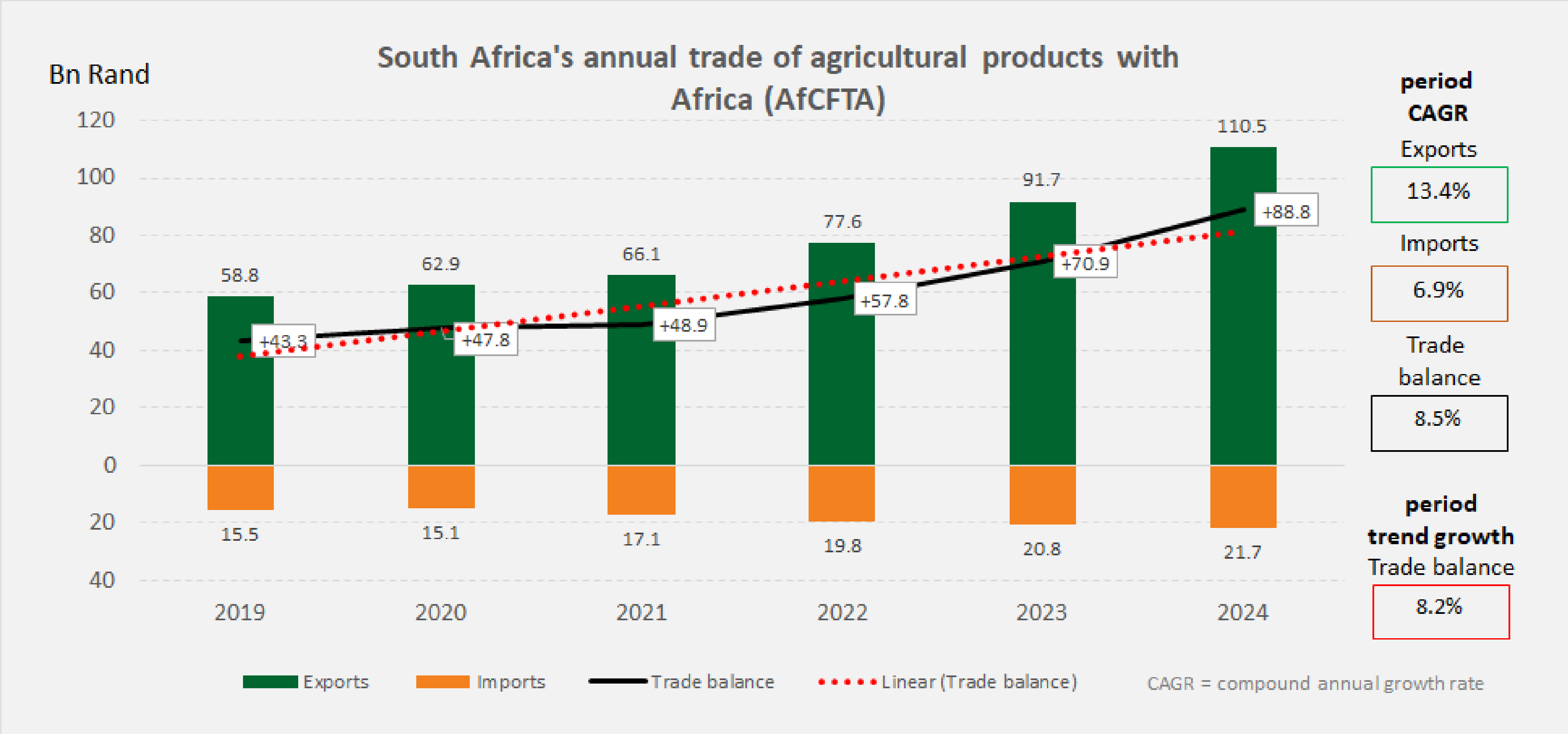

Figure 4: Annual series of South Africa's agricultural trade flows with Africa (AfCFTA) member states (2019 to 2024) in billion Rand
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Figure 4 focusing solely on trade with AfCFTA countries, with a marked increase in agricultural exports from South Africa. Exports increased from approximately R59 billion to R111 billion over five years. The trend corroborates the narrative that tariff phase-down measures under AfCFTA are progressively unlocking significant export growth. Exports reportedly increased by 13% CAGR and imports grew moderately by about 7% CAGR. The trade balance grew from nearly R43 billion in 2019 to R89 billion in 2024 (a 9% compound average growth or 8% trend growth). Growth indicators underline the potential of the AfCFTA as a pivotal driver for South Africa's agriculture.

Exports to Africa

Table 3 zooms in on product-level details with significant figures, focusing on exports to African countries. In 2024, the top 10 products accounted for about 34% of exports to Africa, with certain items like maize corn skyrocketing by 119% from 2023 to 2024. Fresh apples, wheat, and mixed condiments offered more modest yet meaningful growth figures (e.g. fresh apples growing by 21%), while products like maize groats and meal increased by 31%. Each product's entry includes the top three destination markets such as Nigeria, Senegal, and Kenya for apples, illustrating that regional demand is both heterogeneous and opportunity rich. Staple foods are still dominant, such as maize, wheat, soya, while higher value products like apples, beverages and processed food categories progressively become more important in exports.

Table 3: South Africa's top 10 exports of agricultural products to Africa

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share of exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets to Africa exported to [with applied average** tariffs]
Africa (AfCFTA)	**91,697.6**	**110,515.7**	***100.0***	***20.5***	
Products (Top 10)	**27,691.3**	**37,816.6**	***34.2***	***36.6***	
HS100590 Maize corn	6,421.9	14,084.5	*12.7*	*119.3*	1) Zimbabwe [0.0%] 2) Namibia [0.0%] 3) Botswana [0.0%]
HS110313 Maize groats and meal	2,876.2	3,778.0	*3.4*	*31.4*	1) Democratic Republic of Congo [10.0%] 2) Mozambique [0.0%] 3) Lesotho [0.0%]
HS210690 Food preparations; n.e.c. in item no. 2106.10	2,728.9	3,082.3	*2.8*	*13.0*	1) Zimbabwe [0.0%] 2) Botswana [0.0%] 3) Mozambique [0.0%]
HS100199 Wheat and meslin	3,232.9	2,772.0	*2.5*	*-14.3*	1) Botswana [0.0%] 2) Zimbabwe [0.0%] 3) Zambia [0.0%]
HS230990 Dog or cat food, not for retail	2,401.5	2,603.2	*2.4*	*8.4*	1) Namibia [0.0%] 2) Zimbabwe [0.0%] 3) Zambia [0.0%]
HS220600 Cider, perry, mead, sake	2,161.7	2,556.3	*2.3*	*18.3*	1) Botswana [0.0%] 2) Mozambique [0.0%] 3) Zambia [0.0%]
HS080810 Fresh apples	2,064.8	2,506.1	*2.3*	*21.4*	1) Nigeria [20.0%] 2) Senegal [20.0%] 3) Kenya [25.0%]
HS220210 Waters	1,989.4	2,290.2	*2.1*	*15.1*	1) Zimbabwe [0.0%] 2) Namibia [0.0%] 3) Botswana [0.0%]
HS210390 Mixed condiments and mixed seasonings	2,021.5	2,226.4	*2.0*	*10.1*	1) Zimbabwe [0.0%] 2) Botswana [0.0%] 3) Namibia [0.0%]

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share of exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets to Africa exported to [with applied average** tariffs]
HS220300 Beer	1,618.8	2,045.3	*1.9*	*26.3*	1) Zambia [0.0%] 2) Botswana [0.0%] 3) Eswatini [0.0%]

Table notes:
South Africa's agricultural trade flows from/to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Exports include re-exports, totals including BELN flows*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

Imports from African countries

Table 4 reveals detailed import performances. Total imports from Africa grew from R21 billion to R22 billion, a 3% overall increase. Product-specific insights highlight that raw cane sugar, accounting for 17% of the total import value, recorded growth around 6%, whereas live cattle and beer displayed variable trends, with live cattle down by 2% and beer up by over 55%.   Most imports are still from SACU and countries directly bordering South Africa. Dominant import categories are sugar, live cattle, beer, pasta and bananas.

Table 4: South Africa's top 10 imports of agricultural products from Africa

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within the region imported from & [applied average** tariff into South Africa]
Africa (AfCFTA)	**21,334.2**	**22,009.1**	**100.0**	**3.2**	
Products (Top 10)	**11,643.8**	**12,286.8**	***56.5***	***5.5***	
HS170113 Raw cane sugar	3,509.3	3,710.3	*17.1*	*5.7*	1) Eswatini [0.0%] 2) Mauritius [44.8%] 3) Malawi [44.8%]
HS010229 Live cattle	1,887.1	1,846.9	*8.5*	*-2.1*	1) Botswana [0.0%] 2) Namibia [0.0%] 3) Lesotho [0.0%]
HS220300 Beer	1,049.8	1,626.6	*7.5*	*54.9*	1) Botswana [0.0%] 2) Namibia [0.0%] 3) Kenya [5.0%]
HS190219 Uncooked pasta	902.0	893.9	*4.1*	*-0.9*	1) Namibia [0.0%] 2) Nigeria [40.0%] 3) Eswatini [0.0%]
HS080390 Bananas	695.2	870.095	*4.0*	*25.1*	1) Kenya [5.0%] 2) Seychelles [0.0%] 3) Zimbabwe [0.0%]

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within the region imported from & [applied average** tariff into South Africa]
HS170290 Sugars not elsewhere in heading no. 1702	529.3	705.8	*3.2*	*33.3*	1) Kenya [0.0%] 2) Zimbabwe [0.0%] 3) Nigeria [0.0%]
HS010410 Live sheep	720.1	693.8	*3.2*	*-3.7*	1) Namibia [0.0%] 2) Lesotho [0.0%] 3) -
HS240120 Tobacco	1,172.5	684.5	*3.1*	*-41.6*	1) Kenya [109.1%] 2) Zimbabwe [0.0%] 3) Malawi [0.0%]
HS510119 Wool excl. shorn	705.4	684.3	*3.1*	*-3.0*	1) Botswana [0.0%] 2) Namibia [0.0%] 3) Lesotho [0.0%]
HS170410 Chewing gum, sugar-coated or not	473.0	570.59	*2.6*	*20.6*	1) Namibia [0.0%] 2) Kenya [25.0%] 3) Zimbabwe [0.0%]

Table notes:
South Africa's agricultural trade flows from/to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Imports include re-imports, totals including BELN flows*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

SADC Free Trade Area Member States

Figure 5 emphasizes South Africa's the strong regional integration with SADC countries. Exports to SADC FTA members increased from R49 billion in 2019 to R96 billion in 2024, doubling over the period. The robust growth of some high-volume products further emphasises the SADC region's role as a critical export market. Imports were growing at a slower pace than exports, with a widening trade balance in favour of South Africa. Import growth had a rate of approximately 6% per annum.

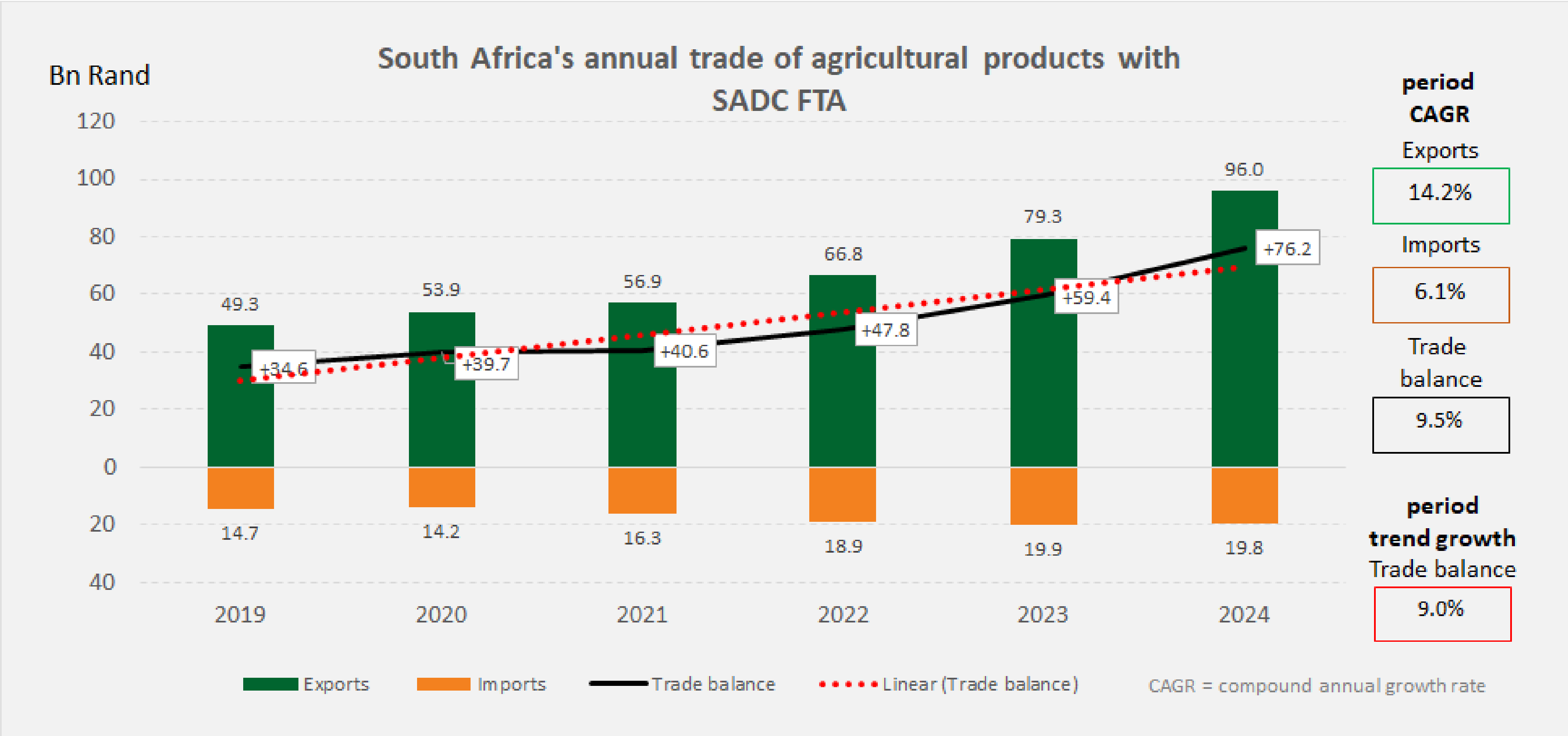

Figure 5: Annual series of South Africa's agricultural trade flows with SADC member states (2019 to 2024) in billion Rand
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Exports to the 12 SADC FTA countries

Product-level data confirms SADC as the dominant trade region. The overall growth of SADC FTA exports increased by 21% while the top 10 products capturing 36% of the exports increased by 39%; reiterating the strategic importance of this bloc. Maize corn leads the list, displaying a staggering 141% increase, while other items like food preparations and beverages show double-digit growth as well. Additional details on destination markets such as Mozambique, Botswana, and Namibia emphasize the interdependence among SADC members, supported by favourable tariff conditions mostly at zero duties. Non-tariff barriers and sudden unpredictable border closures are still the main impediments in trade with neighbouring countries in SACU; but South Africa strongly dominates by trade balance.

Table 5: South Africa's top 10 exports of agricultural products to the SADC FTA members

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets within the region exported to with applied average** tariff
SADC FTA	**79,344.7**	**95,999.8**	***100.0***	***21.0***	
Products (Top 10)	**24,486.5**	**34,132.9**	***35.6***	***39.4***	
HS100590 Maize corn	5,720.7	13,811.1	*14.4*	*141.4*	1) Zimbabwe [0.0%] 2) Namibia [0.0%] 3) Botswana [0.0%]
HS100199 Wheat and meslin	3,232.7	2,758.9	*2.9*	*-14.7*	1) Botswana [0.0%] 2) Zimbabwe [0.0%] 3) Zambia [0.0%]
HS210690 Food preparations; not elsewhere in item no. 2106.10	2,226.4	2,472.8	*2.6*	*11.1*	1) Zimbabwe [0.0%] 2) Botswana [0.0%] 3) Mozambique [0.0%]
HS230990 Dog or cat food, not for retail	2,311.0	2,432.6	*2.5*	*5.3*	1) Namibia [0.0%] 2) Zimbabwe [0.0%] 3) Zambia [0.0%]
HS220600 Cider, perry, mead, sake	2,083.9	2,430.7	*2.5*	*16.6*	1) Botswana [0.0%] 2) Mozambique [0.0%] 3) Zambia [0.0%]
HS220210 Waters	1,942.1	2,208.5	*2.3*	*13.7*	1) Zimbabwe [0.0%] 2) Namibia [0.0%] 3) Botswana [0.0%]
HS210390 Mixed condiments and mixed seasonings	1,869.7	2,049.1	*2.1*	*9.6*	1) Zimbabwe [0.0%] 2) Botswana [0.0%] 3) Namibia [0.0%]
HS220300 Beer	1,606.7	2,035.7	*2.1*	*26.7*	1) Zambia [0.0%] 2) Botswana [0.0%] 3) Eswatini [0.0%]
HS170199 Sucrose	1,701.0	2,016.9	*2.1*	*18.6*	1) Namibia [0.0%] 2) Botswana [0.0%] 3) Zimbabwe [0.0%]
HS150710 Soya-bean oil and its fractions	1,792.3	1,916.6	*2.0*	*6.9*	1) Zimbabwe [0.0%] 2) Zambia [0.0%] 3) Eswatini [0.0%]

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Exports include re-exports, totals including BELN flows*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

Imports from the 12 SADC FTA countries

The total value of imports under the SADC FTA was approximately R20 billion, with a growth of 6% over 5 years and virtually no growth from 2023 to 2024. Key imports include raw cane sugar with a 6% increase, live cattle, and beer, with each subject to duty-free or low-tariff conditions (except for Malawi) that facilitate smooth cross-border flows. The distribution of source markets shows that trade liberalization plays a central role in promoting steady trade within SADC. Imports from the region are dominated by product categories like sugar, live animals, pasta, bananas and tobacco.

Table 6: South Africa's top 10 imports of agricultural products from the SADC FTA members

South Africa's imports* at HS 6-digit level from:	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on imports by value 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & [applied average** tariff into South Africa]
SADC FTA	**19,902.9**	**19,755.1**	***100.0***	***-0.7***	
Products (Top 10)	**11,584.9**	**12,257.3**	***62.9***	***5.8***	
HS170113 Raw cane sugar	3,509.3	3,710.3	*19.0*	*5.7*	1) Eswatini [0.0%] 2) Mauritius [44.8%] 3) Malawi [44.8%]
HS010229 Live cattle	1,887.1	1,846.9	*9.5*	*-2.1*	1) Namibia [0.0%] 2) Botswana [0.0%] 3) Lesotho [0.0%]
HS220300 Beer	1,049.8	1,626.6	*8.4*	*54.9*	1) Namibia [0.0%] 2) Mozambique [0.0%] 3) Lesotho [0.0%]
HS190219 Uncooked pasta	902.0	892.9	*4.6*	*-1.0*	1) Eswatini [0.0%] 2) Namibia [0.0%] 3) Mozambique [0.0%]
HS080390 Bananas	677.0	869.1856	*4.5*	*28.4*	1) Mozambique [0.0%] 2) Eswatini [0.0%] 3) Seychelles [0.0%]
HS170290 Sugars not elsewhere in heading no. 1702	529.3	705.8	*3.6*	*33.3*	1) Eswatini [0.0%] 2) Lesotho [0.0%] 3) Malawi [0.0%]
HS010410 Live sheep	720.1	693.8	*3.6*	*-3.7*	1) Namibia [0.0%] 2) Lesotho [0.0%] 3) -
HS240120 Tobacco	1,152.7	684.4	*3.5*	*-40.6*	1) Zimbabwe [0.0%] 2) Tanzania [0.0%] 3) Mozambique [0.0%]

South Africa's imports* at HS 6-digit level from:	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on imports by value 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & [applied average** tariff into South Africa]
HS510119 Wool excl. shorn	705.4	684.3	*3.5*	*-3.0*	1) Lesotho [0.0%] 2) Eswatini [0.0%] 3) Namibia [0.0%]
HS170410 Chewing gum, sugar-coated or not	452.1	543.02	*2.8*	*20.1*	1) Eswatini [0.0%] 2) Zambia [0.0%] 3) Zimbabwe [0.0%]

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Imports include re-imports, totals including BELN flows*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

Africa excluding SADC FTA member states

In Figure 6, the focus shifts to non-SADC African countries in the AfCFTA. This group of countries is new to having a free trade agreement with South Africa/SACU in the Continent. Exports were R7 billion in 2024, a healthy 8% growth in exports on a compound annual basis, suggesting untapped opportunities in these markets. The divergence from SADC patterns is also evident in that tariff barriers remain higher in these countries with the gradual liberalization. The pace of growth in key products like fresh apples with over 30% growth, food preparations 21% growth, wine 19% growth and cigarettes 104% growth highlights potential future gains once the market is fully liberalised. From the starting point (2019) to the end point (2024), the annual compound trade balance had a growth of 2% while the year-on-year growth trend was 3%.

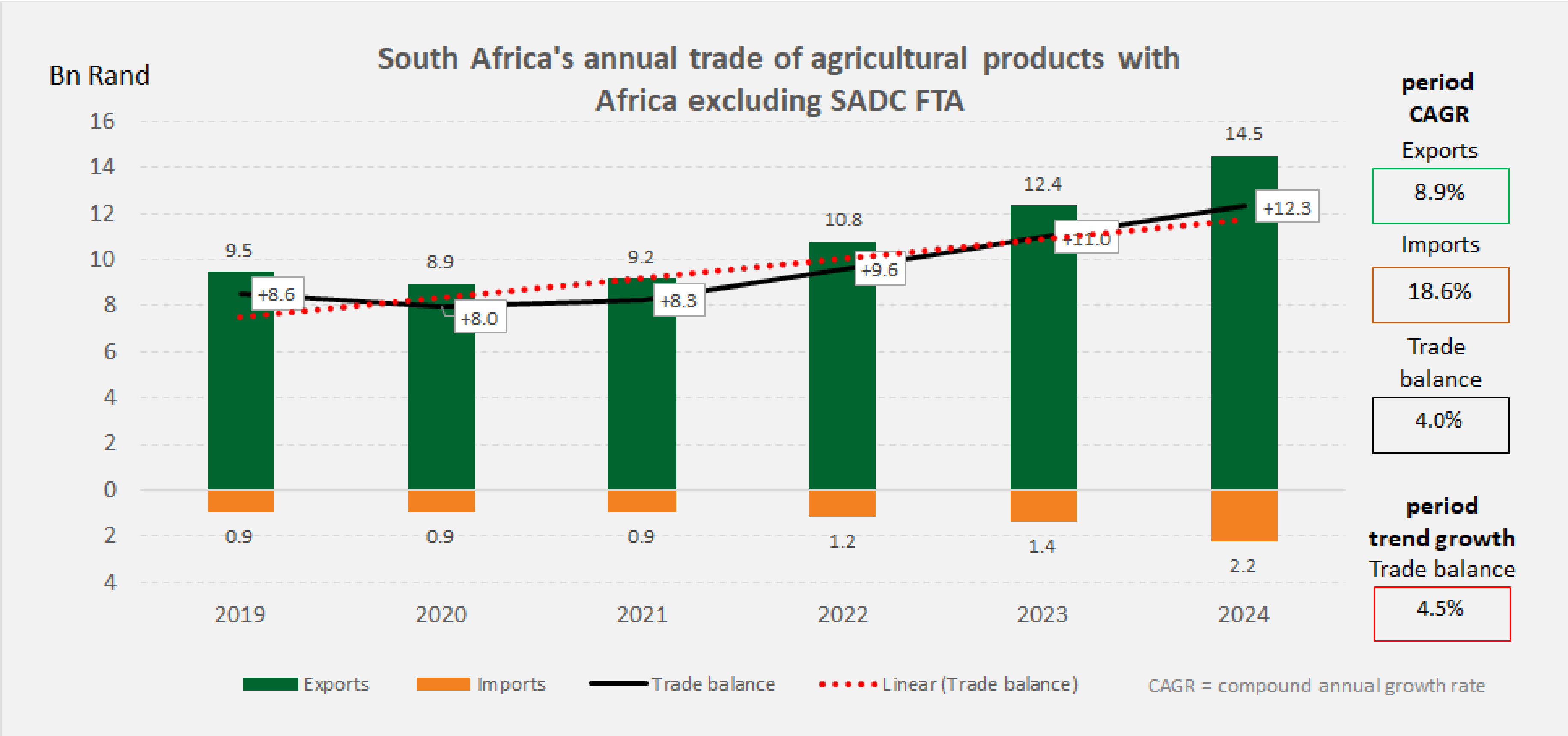

Figure 6: Annual series of South Africa's agricultural trade flows with Africa excluding SADC FTA member states (2019 to 2024) in billion Rand
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Exports to Africa excluding SADC FTA grouping

Table 7 breaks down exports by individual product. Exports are dominated by higher-value products like fruits and processed food. Fresh apples had a 31% growth rate, and other items, such as food preparations and wine, are prominent. Despite the high tariffs[3] imposed by some importing countries (ranging from 20% to 25% on apples), market penetration in countries like Nigeria, Senegal, and Kenya is improving. Other products,

[3] It is expected that these rates should come down once these countries start trading under the AfCFTA rates.

such as maize corn, face contrasting trends (a sharp 65% decline in this category), suggesting that some sectors are more sensitive to external barriers than others. Staples such as grains, oilseeds and meat account for most of the potential value of the new AfCFTA countries in this group.

Table 7: South Africa's top 10 exports agricultural products to Africa excluding SADC FTA members

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value 2024	% Change from 2023 to 2024	Top 3 destination markets within region exported to with applied average** tariff
Africa excluding SADC FTA members	**12,352.9**	**14,516.0**	***100.0***	***17.5***	
Products (Top 10)	**3,414.2**	**3,904.8**	***26.9***	***14.4***	
HS080810 Fresh apples	1,199.8	1,569.0	*10.8*	*30.8*	1) Nigeria [20.0%] 2) Senegal [20.0%] 3) Kenya [25.0%]
HS210690 Food preparations; not elsewhere in item no. 2106.10	367.4	444.0	*3.1*	*20.9*	1) Nigeria [15.6%] 2) Kenya [7.0%] 3) Ghana [15.6%]
HS220421 Wine (≤ 2 Liters)	243.6	290.6	*2.0*	*19.3*	1) Kenya [35.0%] 2) Nigeria [20.0%] 3) Ghana [20.0%]
HS120510 Oil seeds; low erucic acid rape or colza seeds	-	281.6	*1.9*	-	1) Kenya [10.0%] 2) - 3) -
HS100590 Maize corn	684.2	243.2	*1.7*	*-64.5*	1) Côte D'Ivoire [0.0%] 2) Kenya [50.0%] 3) Ghana [5.0%]
HS240220 Cigarettes	114.7	234.2	*1.6*	*104.1*	1) Congo [10.0%] 2) Nigeria [20.0%] 3) Guinea [20.0%]
HS190110 Infant or young children food preparations for retail	225.0	231.3	*1.6*	*2.8*	1) Cameroon [5.0%] 2) Burkina Faso [5.0%] 3) Ghana [5.0%]
HS080521 Mandarins	225.6	223.8	*1.5*	*-0.8*	1) Senegal [20.0%] 2) Nigeria [20.0%] 3) Guinea [20.0%]
HS020230 Boneless beef, frozen	145.5	220.6	*1.5*	*51.6*	1) Egypt [0.0%] 2) Ethiopia [35.0%] 3) Nigeria [35.0%]
HS110313 Maize groats and meal	208.2	166.5	*1.1*	*-20.0*	1) Congo [10.0%] 2) Gabon [10.0%] 3) Cameroon [10.0%]

Table notes:

South Africa's agricultural trade flows from/to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).

** Notes: Exports include re-exports, totals including BELN flows*

*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

Imports from Africa excluding SADC FTA countries

Table 8 provides a detailed look at imports from the rest of the continent. Total imports from this grouping increased 19% over 5 years and by 58% from 2023 to 2024. Imports grew much faster than exports. The top 10 products had an even higher increase of 112%, underlining rapid market shifts in areas like cocoa paste imports, which increased by over 1,111% (coming off a very low base in 2023). The dominant imports, most with very high import growth rates, are notably cocoa, coffee, pasta, cashew nuts, dried kidney beans, tomato sauce, mandarins and tea.

Table 8: South Africa's top 10 imports of agricultural products from the rest of Africa excluding SADC FTA members

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
The rest of AU excluding the SADC FTA	**1,431.3**	**2,254.0**	***100.0***	***57.5***	
Products (Top 10)	**667.9**	**1,412.8**	***62.7***	***111.5***	
HS180310 Cocoa paste	33.3	403.5	*17.9*	*1,111.1*	1) Côte D'Ivoire [0.0%] 2) Ghana [0.0%] 3) -
HS090111 Coffee	258.1	339.0	*15.0*	*31.3*	1) Ethiopia [0.0%] 2) Uganda [0.0%] 3) Rwanda [0.0%]
HS190230 Pasta (excluding stuffed), cooked or otherwise prepared	0.0	149.6	*6.6*	*4,952,130.6*	1) Egypt [20.0%] 2) Tunisia [20.0%] 3) Nigeria [20.0%]
HS080132 Shelled cashew nuts	28.3	125.3	*5.6*	*343.3*	1) Benin [0.0%] 2) Côte D'ivoire [0.0%] 3) Nigeria [0.0%]
HS080610 Fresh grapes	121.2	120.0	*5.3*	*-1.0*	1) Egypt [4.0%] 2) - 3) -
HS200290 Preserved tomatoes	83.5	73.1	*3.2*	*-12.5*	1) Egypt [37.0%] 2) Ghana [37.0%] 3) Nigeria [37.0%]
HS071333 Dried kidney beans	40.1	59.7	*2.6*	*48.8*	1) Ethiopia [10.0%] 2) Kenya [10.0%] 3) Djibouti [10.0%]

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
HS080521 Mandarins	37.7	51.3	*2.3*	*36.4*	1) Morocco [4.0%] 2) Egypt [4.0%] 3) -
HS210320 Tomato ketchup and other tomato sauces	37.6	48.3	*2.1*	*28.4*	1) Egypt [5.0%] 2) Nigeria [5.0%] 3) Ghana [5.0%]
HS090240 Black tea, fermented, in packages <= 3kg	28.1	43.05	*1.9*	*53.2*	1) Kenya [6.0%] 2) Nigeria [6.0%] 3) Ghana [6.0%]

Table notes:

South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).

** Notes: Imports include re-imports, totals including BELN flows*

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European Union (EU) member states

The trend with the European Union is characterized by steady increases in high-value exports. The export figure to the EU increased from approximately R27 billion in 2019 to R48 billion in 2024, marking a modest yet consistent annualised compound growth of 13%. Although growth rates in this region were lower than in some African markets, the quality of products, particularly fresh grapes, mandarins, and avocados, indicated that South Africa is focusing on premium segments of the market. Imports increased by an average of 8% from 2019 to 2024. With the EU, South Africa had a consistently positive trade balance reaching R 10 billion in 2024 from a zero base in 2019.

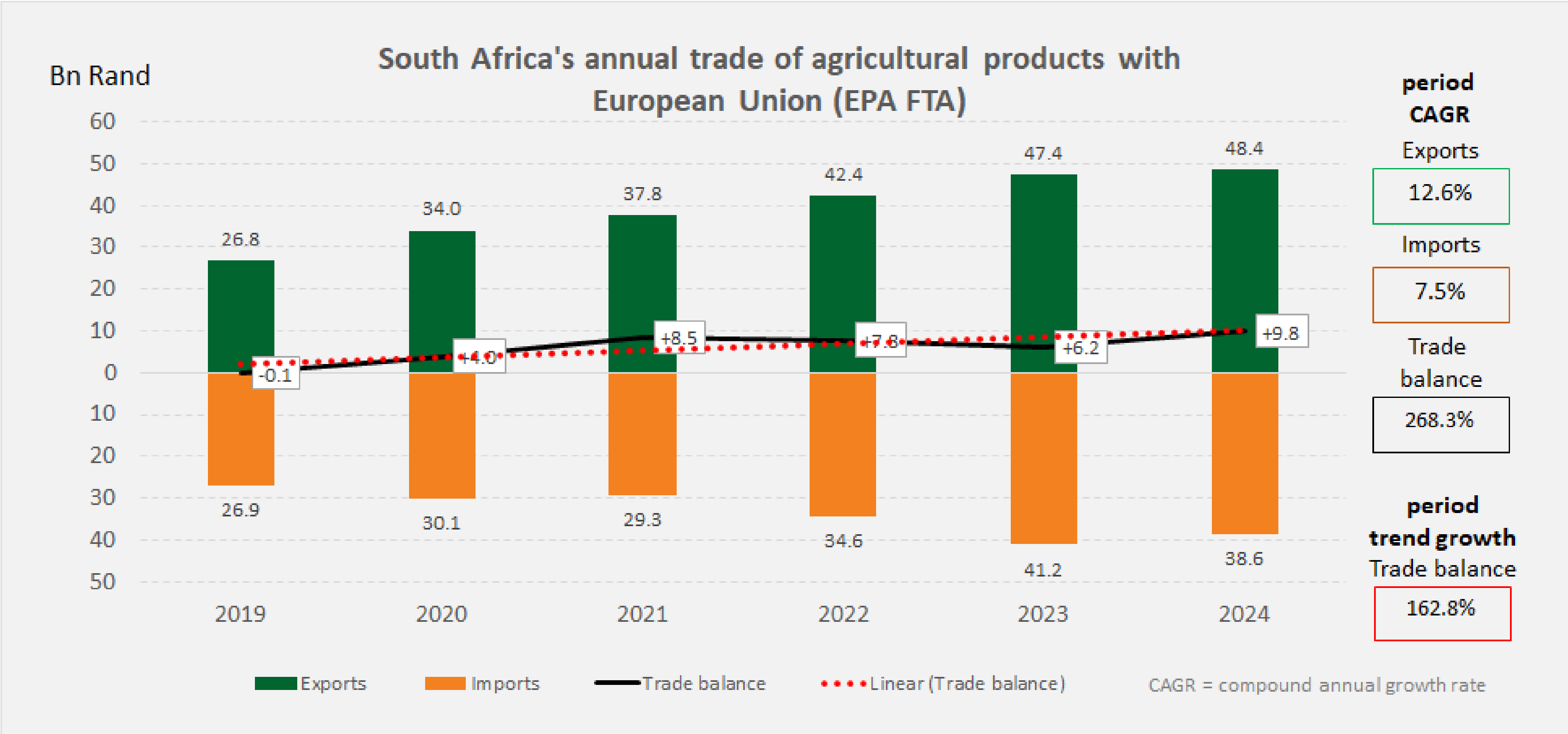

Figure 7: Annual series of South Africa's agricultural trade flow with the EU member states (2019 to 2024) in billion Rand
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Exports to the European Union

The top 10 exports increased by 10%. Fresh grapes stood out with a 12% share by value, although annual growth was minimal (about 0.9%). Avocados increased by 35% and fresh pears, dried grapes by 50% and wines by 12%. Exports of lemons decreased by 12%. Market access tariff barriers remain on citrus (especially oranges) and wine. These figures, combined with market-specific data such as duty rates (often close to zero for horticultural items), reinforce the appeal of South African products to compete in European markets. The overall top 10 products represent a 57% share of total EU-bound exports, indicating concentrated exports targeting high-value consumer goods such as various fruits and beverages.

Table 9: South Africa's top 10 exports of agricultural products to the EU members

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets within the region exported to with applied average** tariff
European Union	**47,407.2**	**48,413.5**	***100.0***	***2.1***	
Products (Top 10)	**25,068.3**	**27,613.9**	***57.0***	***10.2***	
HS080610 Fresh grapes	5,685.5	5,738.1	*11.9*	*0.9*	1) Netherlands [0.0%] 2) Germany [0.0%] 3) Ireland [0.0%]
HS080510 Oranges	4,880.3	4,940.8	*10.2*	*1.2*	1) Netherlands [21.9%] 2) Portugal [21.9%] 3) Italy [21.9%]
HS080521 Mandarins	3,234.9	3,365.8	*7.0*	*4.0*	1) Netherlands [0.0%] 2) Portugal [0.0%] 3) Ireland [0.0%]
HS080440 Avocadoes	2,112.4	2,849.2	*5.9*	*34.9*	1) Netherlands [0.0%] 2) Germany [0.0%] 3) Spain [0.0%]
HS220421 Wine (≤ 2 litres)	2,352.1	2,636.7	*5.4*	*12.1*	1) Netherlands [2.0%] 2) Germany [2.0%] 3) Belgium [2.0%]
HS080550 Lemons	2,829.2	2,498.5	*5.2*	*-11.7*	1) Netherlands [10.4%] 2) Italy [10.4%] 3) Portugal [10.4%]
HS080620 Dried grapes	1,159.6	1,738.3	*3.6*	*49.9*	1) Germany [0.0%] 2) Netherlands [0.0%] 3) France [0.0%]
HS080830 Fresh pears	899.9	1,353.6	*2.8*	*50.4*	1) Netherlands [11.7%] 2) Portugal [11.7%] 3) Italy [11.7%]

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets within the region exported to with applied average** tariff
HS290513 N-butyl alcohol	876.7	1,259.2	*2.6*	*43.6*	1) Belgium [0.0%] 2) - 3) -
HS220429 Wine (>10 litres)	1,037.7	1,233.7	*2.5*	*18.9*	1) Germany [7.5%] 2) Denmark [7.5%] 3) France [7.5%]

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
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Imports from the EU

The top 10 imports had a share of 49% by value. From 2023 to 2024 total agricultural imports from the EU decreased by 6% from R41 billion to R39 billion, driven by shifts in product categories. For instance, wheat and meslin experienced a steep decline of 46%, while other items like food preparations, sunflower seeds, spirits, waters, malt, whiskies, dog and cat food experienced double digit import growth. Import demand for processed high-value and branded luxury products like whiskies and retail dog and cat foods remains steady.

Table 10: South Africa's top 10 imports of agricultural products from the EU members

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
European Union	**41,206.8**	**38,566.6**	***100.0***	***-6.4***	
Products (Top 10)	**19,146.3**	**18,874.4**	***48.9***	***-1.4***	
HS100199 Wheat and meslin	7,235.4	3,893.9	*10.1*	*-46.2*	1) Lithuania [0.0%] 2) Poland [0.0%] 3) Latvia [0.0%]
HS210690 Food preparations; not elsewhere in item no. 2106.10	2,258.2	2,765.8	*7.2*	*22.5*	1) Germany [0.0%] 2) Poland [0.0%] 3) Italy [0.0%]
HS151211 Sunflower seed or safflower oil and their fractions	2,419.1	2,732.1	*7.1*	*12.9*	1) Bulgaria [0.0%] 2) Romania [0.0%] 3) Netherlands [0.0%]
HS220820 Spirits obtained by distilling grape wine or grape	1,767.0	2,170.6	*5.6*	*22.8*	1) France [0.0%] 2) Italy [0.0%] 3) Portugal [0.0%]

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
HS210111 Coffee extracts, essences and concentrates	1,573.8	1,669.0	*4.3*	*6.0*	1) Netherlands [0.0%] 2) Germany [0.0%] 3) Spain [0.0%]
HS220210 Waters	1,045.9	1,476.8	*3.8*	*41.2*	1) Austria [0.0%] 2) Netherlands [0.0%] 3) Poland [0.0%]
HS110710 Roasted malt	175.7	1,148.5	*3.0*	*553.7*	1) Belgium [0.0%] 2) Netherlands [0.0%] 3) France [0.0%]
HS220830 Whiskies	902.2	1,068.6	*2.8*	*18.5*	1) Ireland [0.0%] 2) France [0.0%] 3) Netherlands [0.0%]
HS230990 Dog or cat food, not for retail	887.9	1,037.1	*2.7*	*16.8*	1) France [0.0%] 2) Netherlands [0.0%] 3) Austria [0.0%]
HS230910 Dog or cat food for retail	881.1	911.92	*2.4*	*3.5*	1) Netherlands [0.0%] 2) Czech Republic [0.0%] 3) France [0.0%]

Table notes:
South Africa's agricultural trade flows from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
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United Kingdom (UK)

Post-Brexit trade with the UK is characterized by vigorous growth. Exports to the UK increased significantly from an earlier baseline to R11 billion in 2019 to 19 billion in 2024; a 12% compound annual growth rate. Figure eight underscores the benefits of the independent Economic Partnership Agreement, which has allowed South Africa to leverage preferential conditions in the horticultural sector, especially for products like fresh fruits, wines and tariff rate benefits on sugar. South Africa maintained a very strong trade balance of R15 billion by 2024 with a compound annual growth of 10% or an 8% year-on-year trend growth rate.

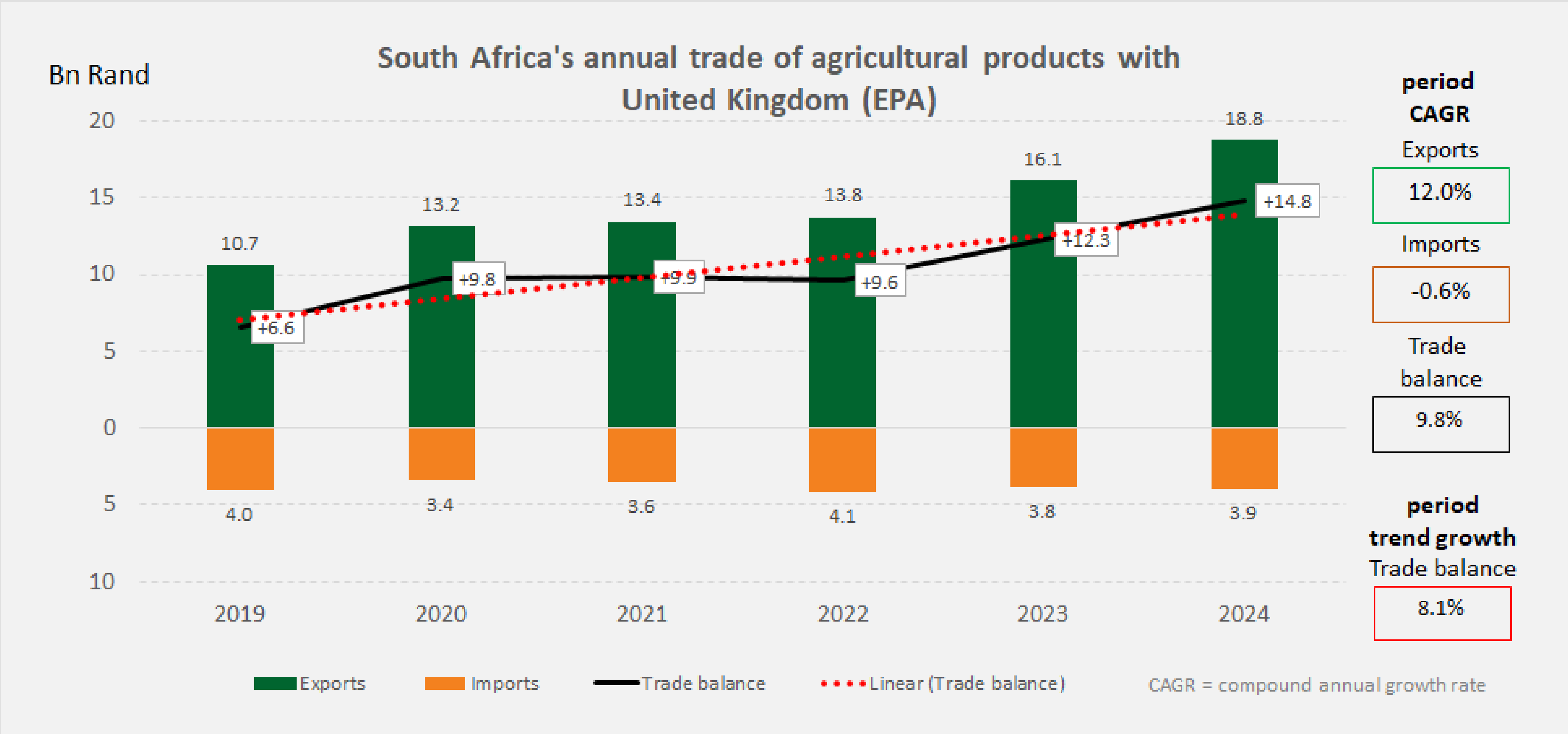

Figure 8: Annual series of South Africa's agricultural trade flow with the UK (2019 to 2024) in billion Rand
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Exports to the UK

Exports to the UK were dominated by fruits and wine. Trade figures reveal a diversified basket led by fresh grapes with a share of 17% of total value and strong growth of 42%. Other strong performers such as lemons and avocados recorded growths of 254% and 48%, respectively. Exports of raw cane sugar, mandarins and wine experienced a decline of 53%, 11% and 6% respectively. Out-of-quota tariffs on sugar remain extremely high at an estimated AVE of 74.4%. Overall, SA exports enjoy duty-free market access to the UK.

Table 11: South Africa's top 10 exports of agricultural products to the United Kingdom

South Africa's exports* at the HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Applied average** tariff on imports from South Africa to the United Kingdom
United Kingdom	**16,127.2**	**18,760.6**	***100.0***	***16.3***	
Products (Top 10)	**11,072.4**	**13,058.9**	***69.6***	***17.9***	
HS080610 Fresh grapes	2,184.3	3,093.2	*16.5*	*41.6*	0.0%
HS080550 Lemons	555.1	1,965.2	*10.5*	*254.0*	0.0%
HS220421 Wine (≤ 2 litres)	1,640.0	1,549.5	*8.3*	*-5.5*	2.4%
HS080810 Fresh apples	1,262.2	1,506.9	*8.0*	*19.4*	0.0%
HS080521 Mandarins	1,617.2	1,444.7	*7.7*	*-10.7*	0.0%
HS081040 Fresh bilberries and cranberries	844.7	880.0	*4.7*	*4.2*	0.0%
HS220429 Wine (>10 litres)	810.7	866.1	*4.6*	*6.8*	6.2%
HS080510 Oranges	629.8	701.9	*3.7*	*11.5*	0.0%
HS170114 Raw cane sugar excl. HS171013	1,200.4	566.5	*3.0*	*-52.8*	74.4%
HS080440 Avocadoes	328.1	484.9	*2.6*	*47.8*	0.0%

Table notes:

South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).

** Notes: Exports include re-exports, totals including BELN flows*

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Imports from the UK

South Africa's imports from the UK remained relatively stable at R4 billion (2019) and R3.9 billion by 2024. The top 10 imports capture more than 70% share that indicate a relatively concentrated product spread of imports. Imports of Gin and Geneva had the highest growth of 94% followed by wholesale Dog or cat food at 55% annual growth. Imports of Frozen swine meat had a healthy increase of 14%, at AVE applied import tariff[4] of 7.5%. Other chocolate and live chicken imports declined by 32% and 14%, respectively.

Table 12: South Africa's top 10 imports of agricultural products from the United Kingdom

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Applied average** tariff on imports from United Kingdom into South Africa
United Kingdom	**3,842.5**	**3,921.8**	***100.0***	***2.1***	
Products (Top 10)	**2,684.9**	**2,836.6**	***72.3***	***5.6***	
HS220830 Whiskies	1,488.9	1,532.0	*10.7*	*2.9*	0.0%
HS010511 Live chicken	246.4	211.2	*1.5*	*-14.3*	0.0%
HS210690 Food preparations; not elsewhere in item no. 2106.10	144.0	165.6	*1.2*	*15.0*	0.0%
HS220850 Gin and Geneva	83.6	161.8	*1.1*	*93.6*	0.0%
HS020329 Frozen swine meat, not elsewhere in item no. 0203.2	127.7	145.5	*1.0*	*14.0*	7.5%
HS230110 Meat or offal flours, meals and pellets	136.7	143.6	*1.0*	*5.0*	0.0%
HS230990 Dog or cat food, not for retail	89.6	139.1	*1.0*	*55.3*	0.0%
HS210390 Mixed condiments and mixed seasonings	125.2	133.7	*0.9*	*6.8*	0.0%
HS180690 Other chocolate	160.5	109.2	*0.8*	*-32.0*	0.0%

[4] The AVE estimate considers the average of the 8-digit tariff lines contained within the reported HS 6-digit line (HS020329 - Frozen swine meat) in the table. There are, for example, two applicable codes for this example: HS 02032910 (at 0% import duty) and HS 02032990 (at 15%), resulting in an average rate of 7.5%, as shown in the table.

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Applied average** tariff on imports from United Kingdom into South Africa
HS110412 Oats - rolled or flaked	82.3	94.9	*0.7*	*15.2*	0.0%

Table notes:

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** Notes: Exports include re-exports, totals including BELN flows*

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European Free Trade Association (EFTA) member states

The trade balance for South Africa with EFTA states remained negative. On a compound annual growth basis, the trade balance decreased by 27% while the year-on-year growth was -23% over the period. South Africa's imports had a compound growth of 7% while exports had a slower growth of only 1%.

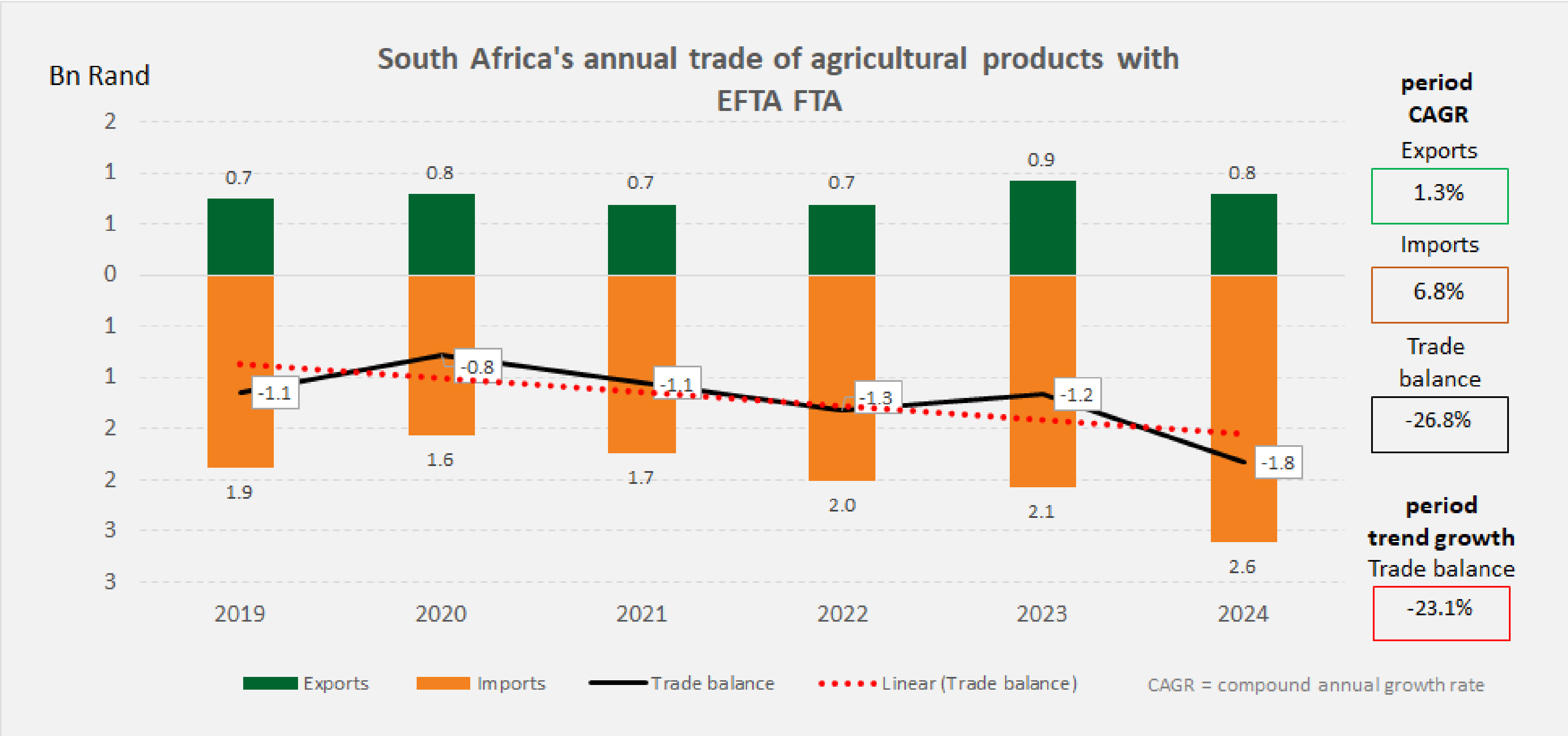

Figure 9: Annual series of South Africa's agricultural trade flow with the EFTA member states (2019 to 2024) in billion Rand
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Exports to EFTA

In 2024, South Africa’s agricultural exports to EFTA states declined by 14% compared to 2023. The top ten exports, accounting for 71% of the total exports, also decreased by 14%. Evident is that trade is very concentrated in the top traded lines. Fresh grapes had the highest growth of 134% while exports of dried fruit, fresh pears and fresh apples increased by 98%, 73% and 69%, respectively. Exports of oranges decreased by 89%. Tariff barriers[5] in Switzerland remains relatively high compared to the EU with an AVE rate of 65% for grapes, 43% for apples, 36% for pears and 13.7% for wine. EFTA remains a small but positive potential growth region for selected high-value South African products.

Table 13: South Africa’s top 10 exports of agricultural products to the EFTA members

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets within region exported to with applied average** tariff
EFTA	**922.2**	**793.1**	***100.0***	***-14.0***	
Products (Top 10)	**655.2**	**562.3**	***70.9***	***-14.2***	
HS080610 Fresh grapes	73.8	172.6	*21.8*	*133.7*	1) Norway [0.0%] 2) Iceland [0.0%] 3) Switzerland [64.9%]
HS220421 Wine (≤ 2 litres)	129.6	113.8	*14.3*	*-12.2*	1) Norway [0.0%] 2) Switzerland [13.7%] 3) Iceland [1.4%]
HS080521 Mandarins	50.0	73.8	*9.3*	*47.7*	1) Norway [9.6%] 2) Switzerland [0.0%] 3) -
HS080620 Dried grapes	31.4	46.9	*5.9*	*49.4*	1) Switzerland [0.0%] 2) Norway [0.0%] 3) Iceland [0.0%]
HS081340 Dried fruit not elsewhere in heading no. 0812	18.8	37.3	*4.7*	*98.5*	1) Switzerland [0.3%] 2) Iceland [0.0%] 3) Norway [0.0%]
HS080510 Oranges	267.4	29.8	*3.8*	*-88.9*	1) Norway [10.2%] 2) Switzerland [0.0%] 3) -
HS200899 Preserved fruit, nuts and other edible parts of plants, other not elsewhere in heading 2008	32.8	25.0	*3.2*	*-23.7*	1) Switzerland [4.2%] 2) - 3) -

[5] Note that these rates are indicative higher-level HS 6-digit ad valorem equivalent rates providing a consolidated estimate of lower-level detail product line import duties based on quantity rates as well as period-specific high-level rates (e.g. for period June 15 to July 14). Each detailed product line at HS 8-digit level needs to be investigated for more details.

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets within region exported to with applied average** tariff
HS200897 Mixed preserved fruits or nuts prepared or preserved in ways not elsewhere in headings 2007 and 2008	28.6	24.0	*3.0*	*-16.1*	1) Switzerland [0.6%] 2) Iceland [0.0%] 3) -
HS080810 Fresh apples	11.6	19.6	*2.5*	*69.4*	1) Norway [15.5%] 2) Switzerland [42.6%] 3) -
HS080830 Fresh pears	11.2	19.49	*2.5*	*73.4*	1) Norway [15.4%] 2) Switzerland [36.4%] 3) -

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Exports include re-exports, totals including BELN flows*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

Imports from EFTA

South Africa imported R2.6 billion worth of agricultural products from EFTA in 2024, an increase of 26% over 2023. The top ten imports made up 96% of the total basket and grew at 26%. Cigarettes were the top imported product despite an import tariff[6] of 22.5%. Dairy whey imports increased substantially from a very low base. Imports of food preparations had a notable increase of 95%. Imports are concentrated in specialised high value manufactured products.

Table 14: South Africa's top 10 imports of agricultural products from the EFTA members

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
EFTA	**2,083.1**	**2,624.2**	***100.0***	***26.0***	
Products (Top 10)	**1,994.4**	**2,514.4**	***95.8***	***26.1***	
HS240220 Cigarettes	1,011.0	1,357.5	*34.6*	*34.3*	1) Switzerland [22.5%] 2) - 3) -

[6] While South Africa (SACU) applies a 0% import duty on HS 24022010 Cigarettes, containing tobacco : Imported from Switzerland, the second tariff line at HS 8-digit level imported from Switzerland, namely HS 24022090 Cigarettes, containing tobacco : Other, attracts a duty of 45%, hence the average at HS 6-digit level as shown in the table is 22.5%.

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
HS220210 Waters	440.6	519.7	*13.3*	*18.0*	1) Switzerland [0.0%] 2) Norway [0.0%] 3) -
HS090121 Coffee	143.3	163.1	*4.2*	*13.9*	1) Switzerland [0.0%] 2) Norway [0.0%] 3) -
HS210111 Coffee extracts, essences and concentrates	133.5	126.1	*3.2*	*-5.6*	1) Switzerland [0.0%] 2) - 3) -
HS210690 Food preparations; not elsewhere in item no. 2106.10	62.3	121.3	*3.1*	*94.7*	1) Switzerland [0.0%] 2) Iceland [0.0%] 3) Norway [0.0%]
HS190110 Infant or young children food preparations for retail	115.4	117.3	*3.0*	*1.6*	1) Switzerland [0.0%] 2) - 3) -
HS230990 Dog or cat food, not for retail	33.8	36.0	*0.9*	*6.7*	1) Switzerland [1.3%] 2) Norway [1.3%] 3) -
HS180632 Chocolate (≤2kg)	35.8	35.4	*0.9*	*-1.0*	1) Switzerland [20.0%] 2) Norway [20.0%] 3) -
HS180690 Other chocolate	18.6	24.2	*0.6*	*30.2*	1) Switzerland [17.0%] 2) Iceland [17.0%] 3) Norway [17.0%]
HS040410 Dairy whey	0.2	13.78	*0.4*	*6822.1*	1) Norway [17.3%] 2) Switzerland [17.3%] 3) -

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Imports include re-imports, totals including BELN flows*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

MERCOSUR-4 member states

South Africa had a negative trade balance of R14 billion reported for 2024 compared to negative R11 billion in 2019 with the MERCOSUR-4. The trade balance gap between 2024 and 2019 therefore widened over time by 22% on an annual compounded growth basis. For MERCOSUR-4 member states, the rest of Latin America is a main source of affordable food contributing to the region's food security. In comparison South Africa's exports to MERCOSUR-4 is of low significance but there is a growing trend off a small base.

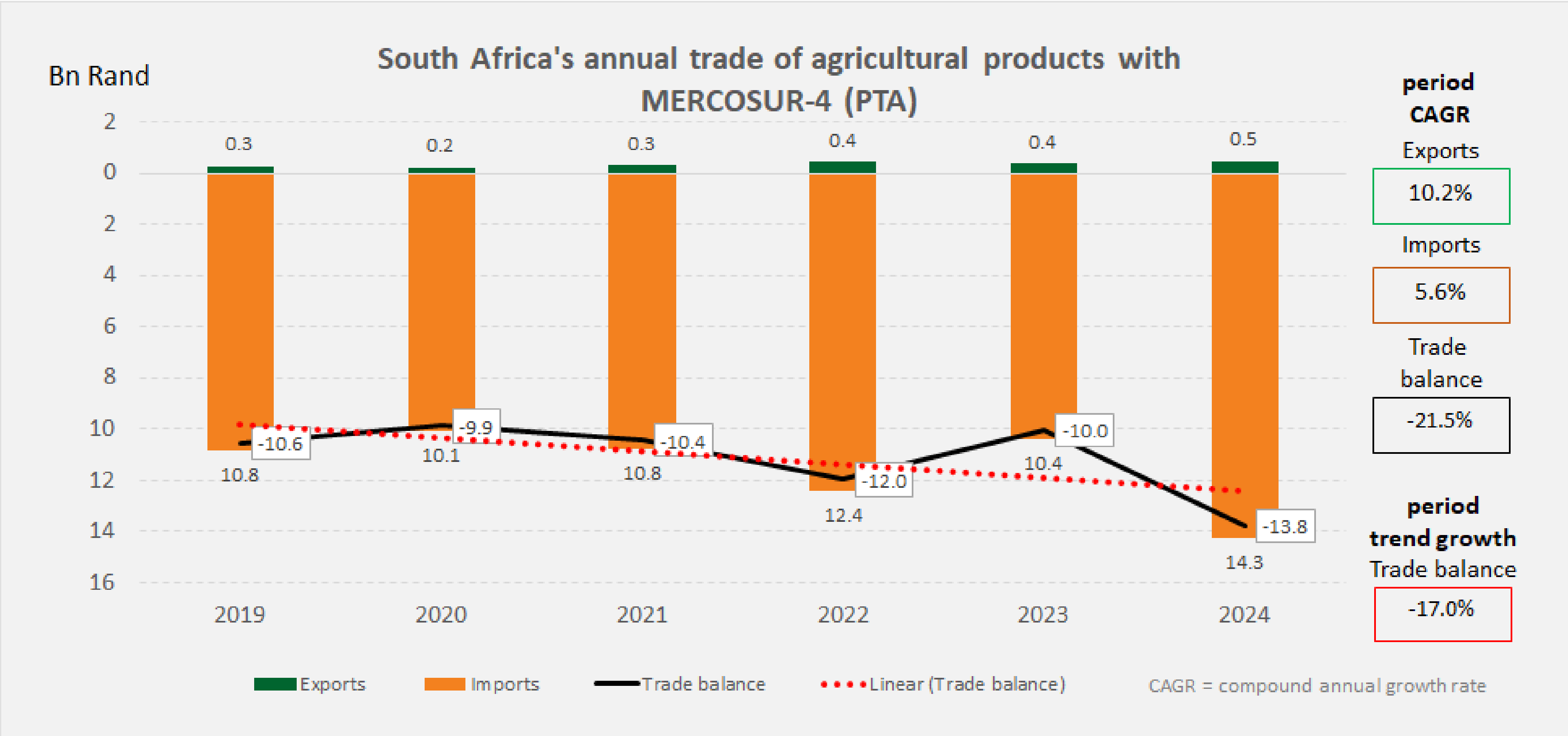

Figure 10: Annual series of South Africa's agricultural trade flow with the MERCOSUR-4 member states (2019 to 2024) in billion Rand
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Exports to MERCOSUR-4

Overall, exports to MERCOSUR-4 increased by 21% between 2023 and 2024 while exports were concentrated in the top 10 products (91% share) and increased by 38%. Beverages exports make up 41% of exports share but have high entry barriers. Exports of seeds for sowing had relatively lower entry barriers.

Table 15: South Africa's top 10 exports of agricultural products to MERCOSUR-4 members

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets within region exported to with applied average** tariff
MERCOSUR-4	**387.4**	**468.1**	***100.0***	***20.8***	
Products (Top 10)	**308.7**	**425.1**	***90.8***	***37.7***	
HS220870 Liqueurs and cordials	106.8	142.9	*30.5*	*33.9*	1) Brazil [20.0%] 2) Paraguay [18.0%] 3) Uruguay [20.0%]
HS120991 Vegetable seeds for sowing	72.0	90.7	*19.4*	*26.0*	1) Brazil [0.0%] 2) Argentina [0.0%] 3) Uruguay [0.0%]
HS290512 Propanol	52.0	74.4	*15.9*	*43.1*	1) Brazil [7.0%] 2) Uruguay [1.0%] 3) Argentina [7.0%]
HS220421 Wine (≤ 2 litres)	34.4	47.3	*10.1*	*37.4*	1) Brazil [27.0%] 2) Paraguay [19.0%] 3) Argentina [20.0%]
HS120999 Sowing seeds	13.2	19.9	*4.3*	*50.7*	1) Brazil [0.0%] 2) Argentina [0.0%] 3) Uruguay [0.0%]
HS080620 Dried grapes	9.6	17.3	*3.7*	*79.6*	1) Brazil [10.0%] 2) Uruguay [10.0%] 3) Argentina [10.0%]
HS200410 Potatoes frozen	-	13.4	*2.9*	-	1) Brazil [14.0%] 2) - 3) -
HS120929 Seeds for sowing of forage plants (excluding lucerne, clover, fescue, Kentucky blue grass, rye grass)	5.7	10.3	*2.2*	*80.0*	1) Argentina [0.0%] 2) Brazil [0.0%] 3) Uruguay [0.0%]
HS330113 Essential oils of lemon	7.4	4.6	*1.0*	*-38.7*	1) Brazil [14.0%] 2) Argentina [14.0%] 3) Uruguay [14.0%]

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets within region exported to with applied average** tariff
HS290519 Other saturated monohydric alcohols	7.6	4.4	*0.9*	*-42.0*	1) Brazil [4.9%] 2) - 3) -

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Exports include re-exports, totals including BELN flows*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

Imports from MERCOSUR-4

South Africa imports staple foods at affordable prices, such as chicken, grains, soya-bean oilcake, coffee, legumes, sunflower seed and animal offal. These are mostly products where South Africa and the region is not fully self-sufficient. Import tariffs on poultry remains high.

Table 16: South Africa's top 10 imports of agricultural products from MERCOSUR-4 members

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
MERCOSUR-4	**10,434.6**	**14,269.0**	***100.0***	***36.7***	
Products (Top 10)	**6,375.8**	**10,304.5**	***72.2***	***61.6***	
HS020712 Frozen whole chicken	1,871.0	2,579.2	*18.1*	*37.9*	1) Brazil [37.7%] 2) Argentina [37.7%] 3) Uruguay [37.7%]
HS100590 Maize corn	0.0	1,795.1	*12.6*	*9,238,222.3*	1) Argentina [0.0%] 2) Brazil [0.0%] 3) -
HS020714 Frozen chicken cuts	1,415.2	1,393.0	*9.8*	*-1.6*	1) Brazil [48.6%] 2) Argentina [48.6%] 3) Paraguay [48.6%]
HS230400 Soya-bean oilcake and other solid residues	907.2	1,040.6	*7.3*	*14.7*	1) Argentina [4.9%] 2) Brazil [4.9%] 3) -
HS090111 Coffee	417.8	898.3	*6.3*	*115.0*	1) Brazil [0.0%] 2) - 3) -

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
HS100790 Grain sorghum	274.2	578.2	*4.1*	*110.9*	1) Brazil [3.0%] 2) - 3) -
HS050400 Animal guts, bladders and stomachs	450.6	554.7	*3.9*	*23.1*	1) Brazil [0.0%] 2) Argentina [0.0%] 3) Uruguay [0.0%]
HS120242 Shelled peanuts, not roasted/cooked	403.5	543.5	*3.8*	*34.7*	1) Brazil [10.0%] 2) Paraguay [10.0%] 3) Argentina [10.0%]
HS071333 Dried kidney beans	35.3	494.1	*3.5*	*1,299.2*	1) Brazil [10.0%] 2) Argentina [10.0%] 3) Uruguay [10.0%]
HS151211 Sunflower seed or safflower oil and their fractions	601.0	427.88	*3.0*	*-28.8*	1) Argentina [10.0%] 2) - 3) -

Table notes:

South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).

** Notes: Imports include re-imports, totals including BELN flows*

*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

Focus on other interest groupings

Other than the regions and countries that South Africa has free trade agreements with, there are regions and countries of special economic and political interest for the industry and government. Particularly, the Asian markets for the fresh produce industry, with the initiative of the fruit industry over the past 20 years to obtain bio-security market access to several priority countries in the east. The meat industry is similarly interested to start accessing the eastern markets when they have sufficiently improved bio-security systems. The geographic definition of Asia was used (Russia included). The analysis of BRIC plus was due to the economic and geo-political importance of trade in the region. Moreover, there is close cooperation in many aspects, with some countries expressing goodwill to South Africa, such as China and the Middle East.

The Middle East is a high value market, as food importer and is less of a threat to South Africa's manufacturing industry. Nevertheless, they don't have the consumer numbers of Asia or the USA. The USA carries prospects of potential, and the unilateral duty-free market access was provided by the AGOA Act until September 2025, theoretically. The future of access to the USA is bleaker with the current geo-politics and the division of the world in a bipolar formation with the USA and China competing dominant superpowers. This undermines the current multilateral trading system as well as the influence of smaller countries like South Africa in the global economic system. Asian countries are of specific importance for the fruit and wine industries as region for future economic expansion and growth. High tariffs remain a major impediment for South Africa into Asia, because Asia has liberalised to a large extend amongst themselves.

The next section therefore provides details for these groups of interest as follows:

- Asia region
- BRIC plus members
- Gulf Cooperation Council (GCC) members (Middle East)
- United States (AGOA)

Asia region (Geographical)

Agricultural exports to Asia had a compound annual growth of 6% and imports increased by 14%. Over the years, the trade balance was in favour of South Africa, except for 2024 when it shifted drastically. The compound growth rate from the trade balance reported for 2019 compared to 2024 showed a sharp decline of 44%, mainly because of decreased exports to Asia while imports from Asia continued along the trend increase. It could be a seasonal effect or trade diversion effect, and it is too early to tell if it is a short- or longer-term phenomena. The linear trend over the period declined by 31% year-on-year. The decline in exports was mainly attributable to the decline in exports of oranges, grapes and wool. Exports of these products did not decline to the EU and the USA but there neither was there much growth to those markets over this period.

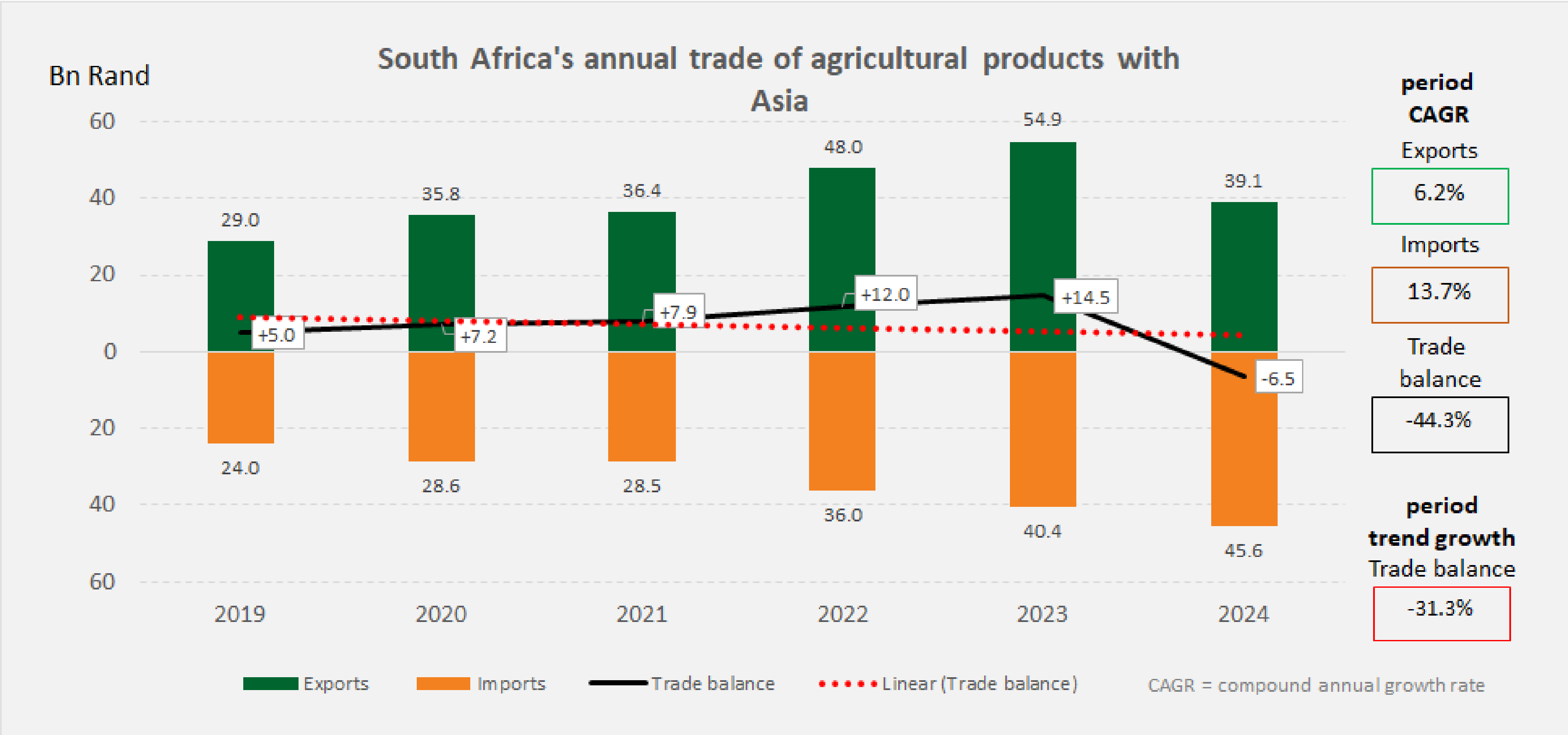

Figure 11: Annual series of South Africa's agricultural trade flow with the Asia region states (2019 to 2024) in billion Rand
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Exports to Asia

Agricultural exports to Asia decreased by 29% from R55 billion in 2023 to R39 billion in 2024. The top 10 export products made up 64% of the export basket and increased by 9% from 2023 to 2024. Greasy shorn wool was the largest exported product but decreased by 7%. Exports of oranges also declined by 13% and grapes declined by 4%, but mandarins increased by 20% and grapefruit by 10%. Exports of raw cane sugar increased by 49% while exports of in shell nuts increased by 12%.

Table 17: South Africa's top 10 exports of agricultural products to Asia region countries

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets within region exported to with applied AVE** tariff
Asia	**54,916.6**	**39,107.4**	***100.0***	***-28.8***	
Products (Top 10)	**22,858.7**	**24,967.8**	***63.8***	***9.2***	
HS510111 Greasy shorn wool	3,903.5	3,625.0	*9.3*	*-7.1*	1) China [38.0%] 2) India [2.5%] 3) Japan [0.0%]
HS080510 Oranges	4,145.0	3,613.8	*9.2*	*-12.8*	1) China [11.0%] 2) Hong Kong [0.0%] 3) India [30.0%]
HS080810 Fresh apples	3,112.9	3,612.9	*9.2*	*16.1*	1) China [10.0%] 2) Hong Kong [0.0%] 3) India [15.0%]
HS080521 Mandarins	2,361.2	2,821.0	*7.2*	*19.5*	1) China [12.0%] 2) Hong Kong [0.0%] 3) India [30.0%]
HS080299 In shell nuts not elsewhere in heading 0801 and 0802	2,031.1	2,750.2	*7.0*	*35.4*	1) China [24.0%] 2) India [100.0%] 3) Japan [0.0%]
HS080261 In shell macadamia nuts	2,146.2	2,393.5	*6.1*	*11.5*	1) China [12.0%] 2) Hong Kong [0.0%] 3) India [30.0%]
HS170114 Raw cane sugar excl. HS171013	1,544.2	2,307.5	*5.9*	*49.4*	1) Singapore [0.0%] 2) Taiwan [6.3%] 3) Malaysia [0.0%]
HS080830 Fresh pears	1,412.3	1,606.8	*4.1*	*13.8*	1) China [11.3%] 2) Hong Kong [0.0%] 3) India [30.0%]
HS080610 Fresh grapes	1,294.3	1,241.6	*3.2*	*-4.1*	1) China [13.0%] 2) Hong Kong [0.0%] 3) India [30.0%]

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets within region exported to with applied AVE** tariff
HS080540 Grapefruit and pomelos	907.9	995.6	*2.5*	*9.7*	1) China [12.0%] 2) Hong Kong [0.0%] 3) India [25.0%]

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
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Imports from Asia

Overall imports from Asia increased by 13%. The top 10 imports were very concentrated, accounting for 70% of the import basket and increased by 15%. Rice import share was 25% at a growth rate of 4%. Rice was imported mainly from Thailand, India and Viet Nam, duty-free. Generally, South Africa is import dependent for these products such as rice, wheat, apple juice, palm oil and some fish products.

Table 18: South Africa's top 10 imports of agricultural products from Asia region countries

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
Asia	**40,372.7**	**45,645.2**	***100.0***	***13.1***	
Products (Top 10)	**27,834.0**	**31,895.8**	***69.9***	***14.6***	
HS100630 Rice	11,070.7	11,521.0	*25.2*	*4.1*	1) Thailand [0.0%] 2) India [0.0%] 3) Viet Nam [0.0%]
HS151190 Palm oil and its fractions	8,399.7	9,027.1	*19.8*	*7.5*	1) Indonesia [10.0%] 2) Malaysia [10.0%] 3) Singapore [10.0%]
HS100199 Wheat and meslin	1,739.6	3,143.9	*6.9*	*80.7*	1) Russian Federation [0.0%] 2) Uzbekistan [0.0%] 3) India [0.0%]
HS200979 Apple juice	1,476.8	1,826.0	*4.0*	*23.6*	1) China [0.0%] 2) Hong Kong [0.0%] 3) Thailand [0.0%]
HS050400 Animal guts, bladders and stomachs	1,398.3	1,508.8	*3.3*	*7.9*	1) China [0.0%] 2) India [0.0%] 3) -

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
HS240412 Products containing nicotine, other than tobacco	841.0	1,413.3	*3.1*	*68.1*	1) China [0.0%] 2) South Korea [0.0%] 3) Hong Kong [0.0%]
HS160413 Prepared sardines, sardinella and brisling or sprats	1,250.1	1,253.7	*2.7*	*0.3*	1) Thailand [3.2%] 2) China [3.2%] 3) Philippines [3.2%]
HS160414 Preserved tunas, skipjack tuna and bonito	451.0	859.4	*1.9*	*90.6*	1) Thailand [12.5%] 2) China [12.5%] 3) Maldives [12.5%]
HS151329 Palm kernel or babassu oil and their fractions	536.5	673.1	*1.5*	*25.5*	1) Indonesia [0.0%] 2) Malaysia [0.0%] 3) China [0.0%]
HS350400 Peptones and their derivatives	670.2	669.47	*1.5*	*-0.1*	1) China [0.0%] 2) India [0.0%] 3) Singapore [0.0%]

Table notes:
South Africa’s agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Imports include re-imports, totals including BELN flows*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

BRIC plus members

South Africa had an oscillating (around zero) agricultural trade balance with BRIC plus members, but turning slightly negative from 2023 to 2024, resulting in a five-year trend growth of negative 30% year-on-year over the period. Due to the 2024 decline the CGAR over five years was minus 38%. Over the years, exports increased by around 13% on a compound annual growth basis while imports increased slightly faster by 15%, hence resulting in a negative trade balance in the latest year.

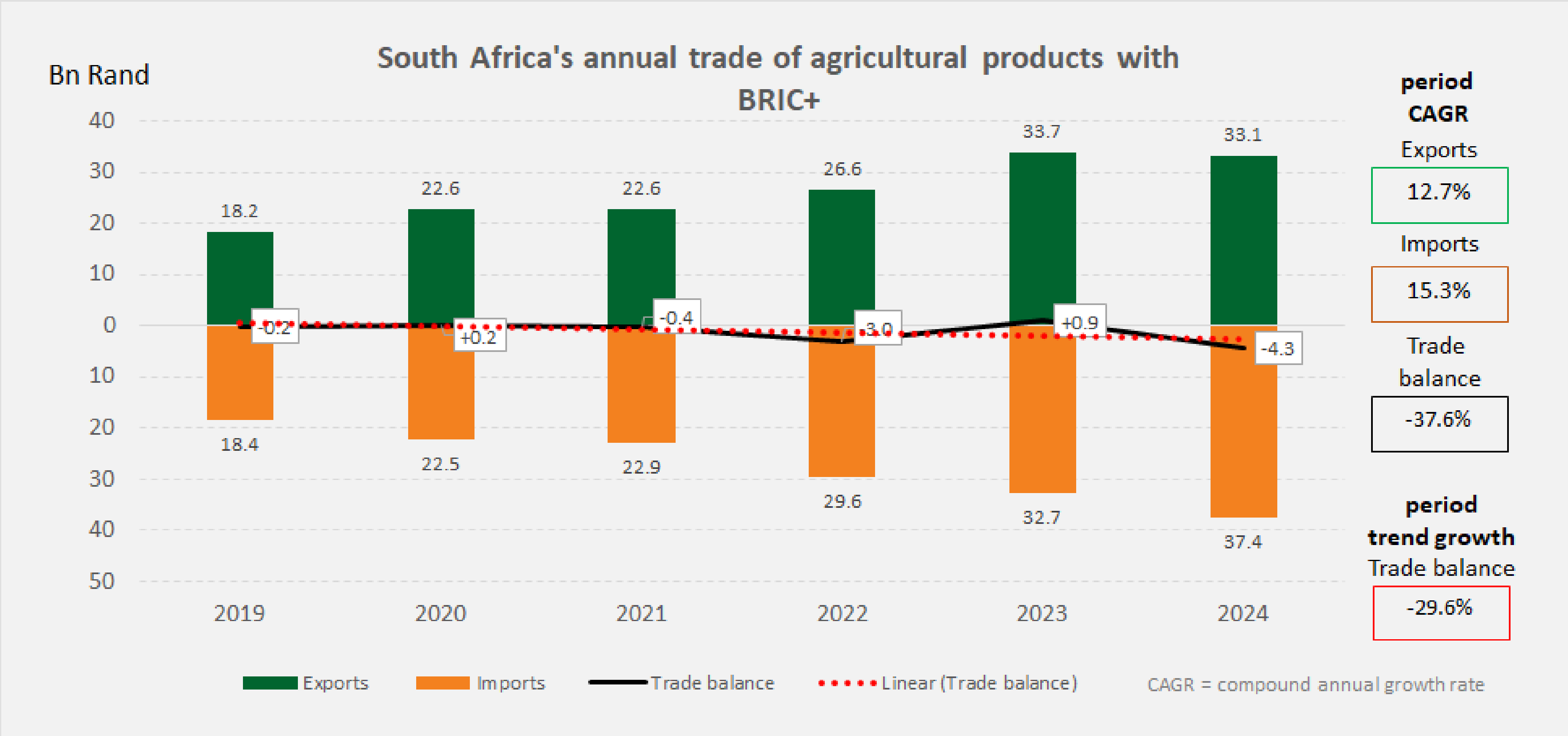

Figure 12: Annual series of South Africa's agricultural trade flow with the BRICS+ states (2019 to 2024) in billion Rand
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Exports to BRIC plus

Overall exports to BRIC plus decreased by 2%. Exports of the top 10 products increased by 5%. Greasy shorn wool was the largest export commodity with a share of 11% in the total basket but decreased by 8% from 2023 to 2024. The average import tariff duty equivalent of wool from South Africa to China[7] was 38% (Most Favoured Nations rate). Exports of oranges and lemons also declined by 14% and 6% respectively, although exports of mandarins grew by 10%. Other nuts grew 36%. Fresh apples, with 43%, had the fastest growing exports to the UAE, India and China. Strong growth of selected export products shows the importance of BRIC and Asia markets despite year-to-year variations due to climate and production fluctuations and the effect of seasonal changes in the attractiveness of markets or trade diversion effects.

Table 19: South Africa's top 10 exports of agricultural products to BRIC+ members

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value 2024	% Change from 2023 to 2024	Top 3 destination markets within region exported to with applied average** tariff
BRIC+	**33,681.1**	**33,125.2**	***100.0***	***-1.7***	
Products(Top10)	**20,087.8**	**21,155.4**	***63.9***	***5.3***	
HS510111 Greasy shorn wool	3,975.8	3,667.5	*11.1*	*-7.8*	1) China [38.0%] 2) India [2.5%] 3) Egypt [0.0%]
HS080510 Oranges	4,067.8	3,488.0	*10.5*	*-14.3*	1) United Arab Emirates [0.0%] 2) Russian Federation [5.0%] 3) China [11.0%]
HS080299 Other nuts not elsewhere in heading 0801 and 0802	2,025.9	2,746.9	*8.3*	*35.6*	1) China [24.0%] 2) United Arab Emirates [5.0%] 3) Russian Federation [5.0%]
HS080521 Mandarins	2,269.7	2,501.6	*7.6*	*10.2*	1) Russian Federation [5.0%] 2) United Arab Emirates [0.0%] 3) China [12.0%]
HS080261 In shell macadamia nuts	2,099.3	2,299.1	*6.9*	*9.5*	1) China [12.0%] 2) India [30.0%] 3) United Arab Emirates [5.0%]
HS080810 Fresh apples	1,436.6	2,057.0	*6.2*	*43.2*	1) United Arab Emirates [0.0%] 2) India [15.0%] 3) China [10.0%]
HS080830 Fresh pears	1,490.2	1,740.9	*5.3*	*16.8*	1) Russian Federation [5.0%] 2) United Arab Emirates [0.0%] 3) India [30.0%]

[7] Note that China's proposed duty-free access for products from Africa announcement is not applicable for the period of analysis.

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value 2024	% Change from 2023 to 2024	Top 3 destination markets within region exported to with applied average** tariff
HS080550 Lemons	1,346.4	1,265.7	*3.8*	*-6.0*	1) United Arab Emirates [0.0%] 2) Russian Federation [5.0%] 3) China [11.0%]
HS080610 Fresh grapes	754.7	753.9	*2.3*	*-0.1*	1) United Arab Emirates [0.0%] 2) Russian Federation [5.0%] 3) China [13.0%]
HS080540 Grapefruit and pomelos	621.4	634.8	*1.9*	*2.2*	1) China [12.0%] 2) Russian Federation [5.0%] 3) United Arab Emirates [0.0%]

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Exports include re-exports, totals including BELN flows.*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

Imports from BRIC plus

Imports from BRIC plus increased by 14% while the top 10 imports representing 59% share increased by 9%. Palm oil, while showing a decline of 15% from 2023 to 2024, was the largest import products at 15%, followed by wheat and meslin with a share of 9% and increased by 35%, originating mostly from Russia, UAE and Brazil. Imports of frozen whole chicken grew by 37%, mainly from Brazil. Coffee imports increased by 99% with duty free market access for the top three suppliers. Imports of rice and chicken cuts decreased by 7% and 10% respectively, with zero import tariffs on rice but high average tariffs of 38% on chicken imports from Brazil and China.

Table 20: South Africa's top 10 imports of agricultural products from BRIC+ members

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
BRIC+	**32,732.7**	**37,447.0**	***100.0***	***14.4***	
Products (Top 10)	**20,238.2**	**22,081.7**	***59.0***	***9.1***	
HS151190 Palm oil and its fractions	6,745.1	5,711.3	*15.3*	*-15.3*	1) Indonesia [10.0%] 2) China [10.0%] 3) India [10.0%]
HS100199 Wheat and meslin	2,332.9	3,143.9	*8.4*	*34.8*	1) Russian Federation [0.0%] 2) United Arab Emirates [0.0%] 3) Brazil [0.0%]

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
HS100630 Rice	2,670.0	2,490.4	*6.7*	*-6.7*	1) India [0.0%] 2) United Arab Emirates [0.0%] 3) Brazil [0.0%]
HS020712 Frozen whole chicken	1,783.7	2,448.9	*6.5*	*37.3*	1) Brazil [37.7%] 2) China [37.7%] 3) -
HS050400 Animal guts, bladders and stomachs	1,818.1	2,001.0	*5.3*	*10.1*	1) China [0.0%] 2) Brazil [0.0%] 3) India [0.0%]
HS200979 Apple juice	1,439.1	1,836.5	*4.9*	*27.6*	1) China [0.0%] 2) Brazil [0.0%] 3) India [0.0%]
HS240412 Products containing nicotine, other than tobacco	838.7	1,408.9	*3.8*	*68.0*	1) China [0.0%] 2) United Arab Emirates [0.0%] 3) -
HS020714 Frozen chicken cuts	1,333.5	1,199.4	*3.2*	*-10.1*	1) Brazil [48.6%] 2) China [48.6%] 3) -
HS090111 Coffee	552.2	1,097.9	*2.9*	*98.8*	1) Brazil [0.0%] 2) Ethiopia [0.0%] 3) Indonesia [0.0%]
HS350400 Peptones and their derivatives	724.9	743.55	*2.0*	*2.6*	1) China [0.0%] 2) Brazil [0.0%] 3) India [0.0%]

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Imports include re-imports, totals including BELN flows*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

Gulf Cooperation Council (GCC) members (Middle East)

South Africa has a growing (9% compound per annum growth) and favourable trade balance (plus R 14.5 billion in 2024) with the GCC over time. Over the past five years, exports to the GCC had a compound annual increase of 15% per year, while imports increased only by 5% per annum over the period. In recent years the Middle East has become a region of economic interest for the South African industry. Most middle eastern countries do not pose a threat to South African manufacturing and therefore prospective future open trade could be beneficial. However, consumer numbers are relatively low compared to other Asian countries. Tariffs are already relatively low, mostly zero for the top 10 exports, due to food import dependences in GCC states.

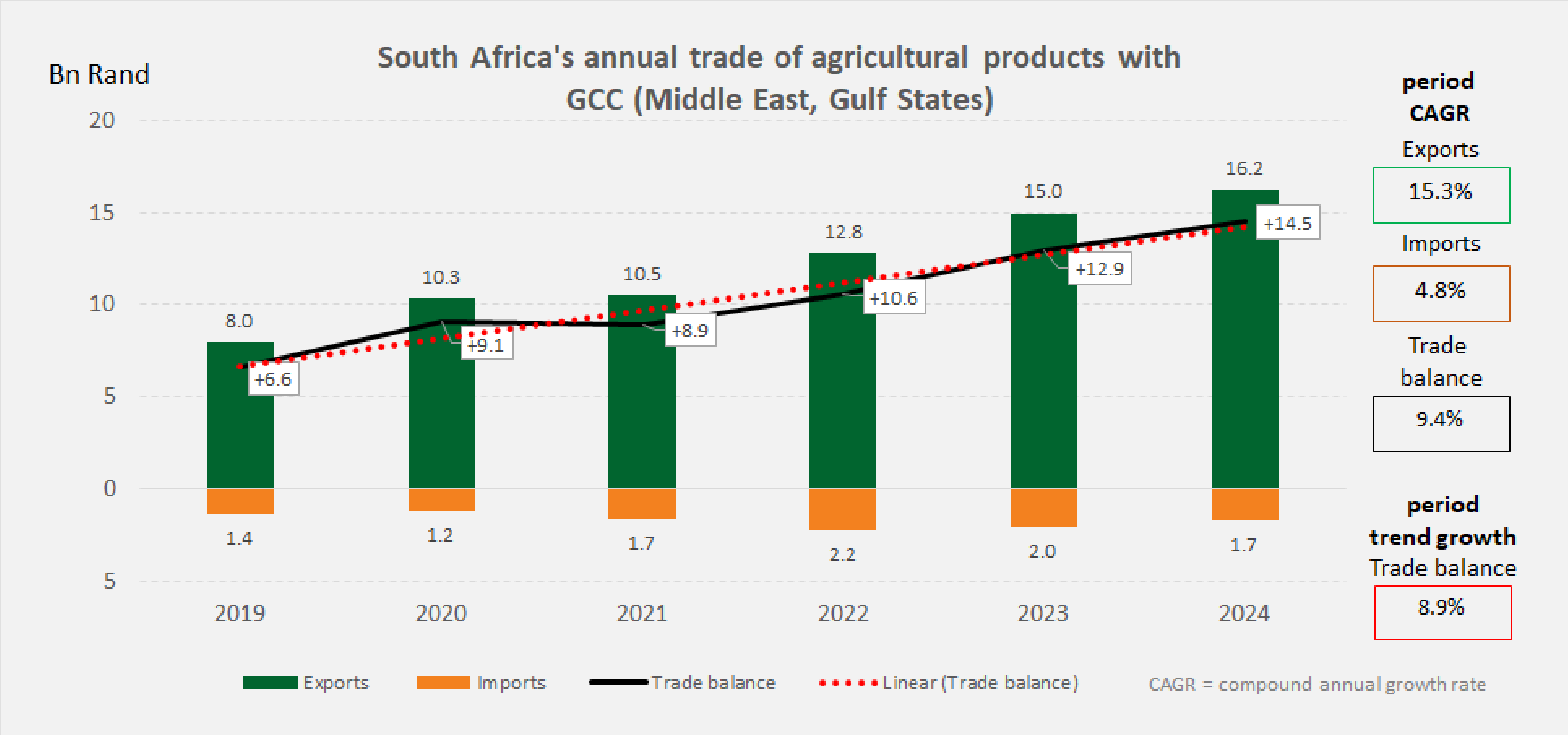

Figure 13: Annual series of South Africa's agricultural trade flow with the GCC states (2019 to 2024) in billion Rand
Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Exports to GCC

South Africa's exports to the GCC increased by 9% from 2023 to 2024, while exports of the top 10, a 64% share, increased by 10%. Oranges had the highest export share of 15% but decreased by 4% year-on-year. Exports of fresh sheep and lamb carcasses had a notable increase of 88% and boneless beef meat by 26%. Despite annual climate and production fluctuations SA enjoy favourable trade on fruits and meats and other products not reflected in the top 10.

Table 21: South Africa's top 10 exports of agricultural products to GCC members

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets within region exported to with applied average** tariff
GCC	**14,968.3**	**16,247.8**	***100.0***	***8.5***	
Products (Top 10)	**9,384.7**	**10,309.7**	***63.5***	***9.9***	
HS080510 Oranges	2,539.0	2,444.2	*15.0*	*-3.7*	1) United Arab Emirates [0.0%] 2) Saudi Arabia [0.0%] 3) Qatar [0.0%]
HS080550 Lemons	1,117.9	1,242.1	*7.6*	*11.1*	1) United Arab Emirates [0.0%] 2) Saudi Arabia [0.0%] 3) Kuwait [0.0%]
HS020130 Boneless beef, chilled	970.4	1,223.6	*7.5*	*26.1*	1) United Arab Emirates [0.0%] 2) Kuwait [0.0%] 3) Qatar [0.0%]
HS080810 Fresh apples	865.4	1,169.2	*7.2*	*35.1*	1) United Arab Emirates [0.0%] 2) Saudi Arabia [0.0%] 3) Qatar [0.0%]
HS080521 Mandarins	1,118.9	1,067.1	*6.6*	*-4.6*	1) United Arab Emirates [0.0%] 2) Saudi Arabia [0.0%] 3) Kuwait [0.0%]
HS080830 Fresh pears	646.2	788.6	*4.9*	*22.0*	1) United Arab Emirates [0.0%] 2) Saudi Arabia [0.0%] 3) Oman [0.0%]
HS020410 Fresh or chilled sheep & lamb carcasses and half-carcasses	362.5	682.6	*4.2*	*88.3*	1) Kuwait [0.0%] 2) United Arab Emirates [0.0%] 3) Qatar [0.0%]
HS081010 Fresh strawberries	462.5	594.6	*3.7*	*28.5*	1) United Arab Emirates [0.0%] 2) Saudi Arabia [0.0%] 3) Qatar [0.0%]

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Top 3 destination markets within region exported to with applied average** tariff
HS220720 Liqueurs and alcohol cordials	569.7	549.5	*3.4*	*-3.5*	1) United Arab Emirates [2.5%] 2) Saudi Arabia [2.5%] 3) -
HS121410 Lucerne	732.1	548.3	*3.4*	*-25.1*	1) United Arab Emirates [0.0%] 2) Saudi Arabia [0.0%] 3) Kuwait [0.0%]

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Exports include re-exports, totals including BELN flows*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

Imports from Gulf GCC

Overall imports from GCC decreased by 14% while the top 10 imports (representing 92% of exports) decreased by 12%. Some of the strong import trends are for tomato ketchup (up 35%), mixed condonements and seasonings (up 59%) and dried lentils (up 41%), mostly imported from the UAE, with some from Oman, Saudi Arabia and Bahrain. South Africa has substantial tariffs on the import of sweet biscuits and chocolate- and cocoa preparations.

Table 22: South Africa's top 10 imports of agricultural products from GCC members

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
GCC	**2,040.3**	**1,748.6**	***100.0***	***-14.3***	
Products (Top 10)	**1,827.0**	**1,601.9**	***91.6***	***-12.3***	
HS290531 Acyclic, diols; ethylene glycol (ethanediol)	924.3	680.2	*38.9*	*-26.4*	1) Saudi Arabia [0.0%] 2) Kuwait [0.0%] 3) United Arab Emirates [0.0%]
HS220210 Waters	261.2	278.6	*15.9*	*6.7*	1) United Arab Emirates [0.2%] 2) Oman [0.2%] 3) Saudi Arabia [0.2%]
HS190531 Sweet biscuits	249.6	227.8	*13.0*	*-8.8*	1) Bahrain [21.0%] 2) United Arab Emirates [21.0%] 3) Saudi Arabia [21.0%]

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total imports by value in 2024	% Change from 2023 to 2024	Top 3 source markets within region imported from & applied average** tariff into South Africa
HS290511 Methanol	152.4	151.3	*8.7*	*-0.7*	1) Saudi Arabia [0.0%] 2) - 3) -
HS210320 Tomato ketchup and other tomato sauces	56.9	77.0	*4.4*	*35.3*	1) Oman [5.0%] 2) United Arab Emirates [5.0%] 3) -
HS290532 Propylene glycol	66.9	61.1	*3.5*	*-8.7*	1) Saudi Arabia [0.0%] 2) United Arab Emirates [0.0%] 3) -
HS210390 Mixed condiments and mixed seasonings	28.9	45.9	*2.6*	*59.0*	1) United Arab Emirates [8.7%] 2) Oman [8.7%] 3) Saudi Arabia [8.7%]
HS080410 Dates - fresh or dried	33.7	35.3	*2.0*	*4.9*	1) Saudi Arabia [0.0%] 2) United Arab Emirates [0.0%] 3) -
HS071340 Dried lentils, shelled, whether or not skinned or split	16.0	22.5	*1.3*	*40.6*	1) United Arab Emirates [0.0%] 2) Bahrain [0.0%] 3) -
HS180631 Chocolate and other food preparations containing cocoa	37.1	22.25	*1.3*	*-40.1*	1) United Arab Emirates [20.0%] 2) Saudi Arabia [20.0%] 3) -

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Imports include re-imports, totals including BELN flows.*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

United States (AGOA)

In 2024, South Africa had a strong positive trade balance of R6 billion with the USA. Imports from the USA decreased by 4% over five years on compound annual growth basis. South Africa's trade balance with the USA maintained a strong compound annualised year-on-year growth of 53%, with a trend growth of 45% through the five years. As much as the African Growth and Opportunity Act (AGOA) provided South Africa with a potential for market access advantage, bio-security issues are still major nontariff barriers; especially on avocadoes but also other fruits exports. The USA was traditionally a very open and competitive market; however, the recently geo-political events create uncertainty with respect to future benefits. If South Africa is to face the higher end of the tariff's spectrum to the USA in comparison to potential low end duty competitor countries, it is unlikely that South African agricultural exports will remain competitive into the USA on low value goods that are very price sensitive.

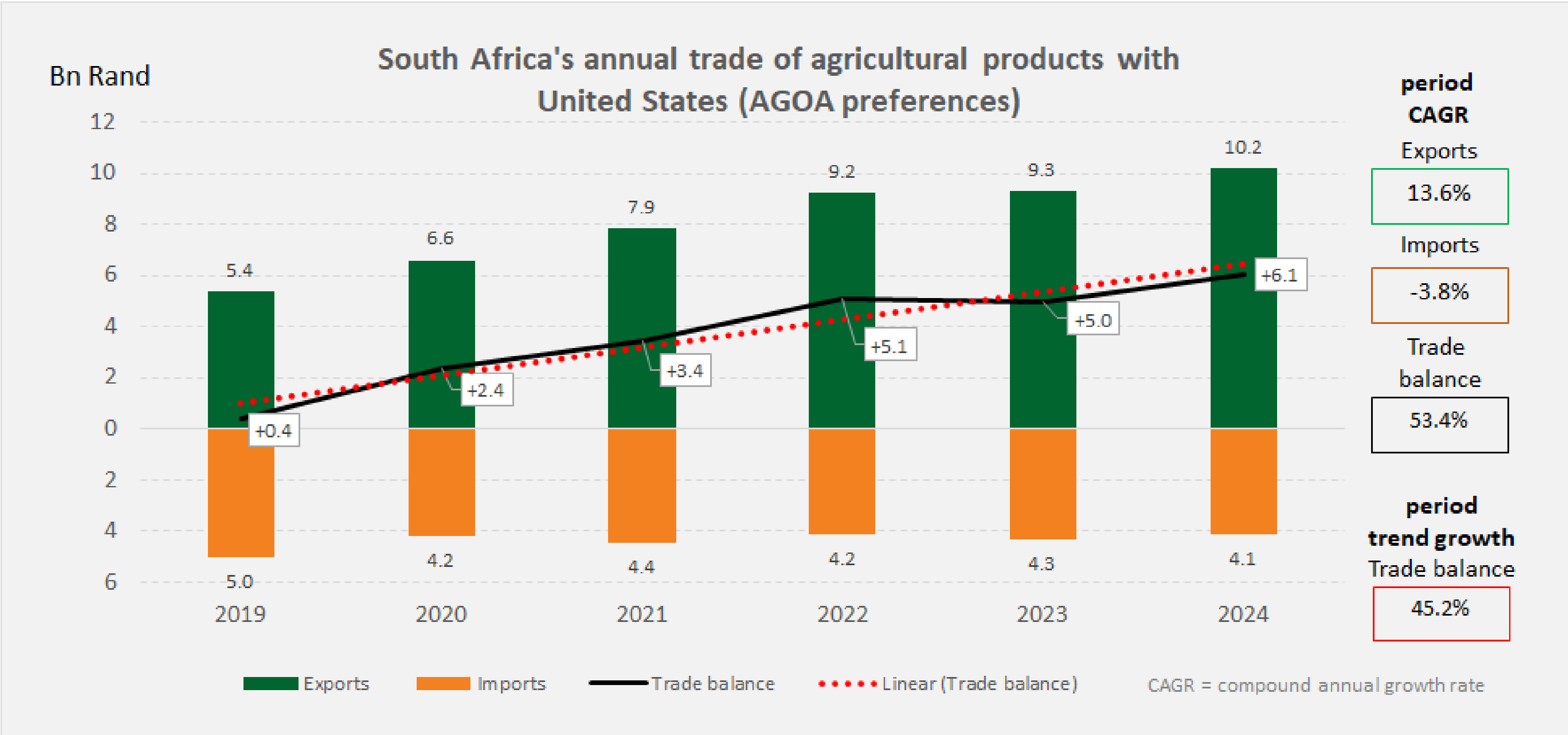

Figure 14: Annual series of South Africa's agricultural trade flow with the US (2019 to 2024) in billion Rand

Source: Calculated from South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [Mar 2025 release]

Exports to the USA

In 2024, South Africa's exports to the United States of America increased by 10% from 2023. The top 10 products made up 56% of the export basket and increased by 3%. The largest exports were shelled macadamia nuts with a share of 9% and a year-on-year increase of 46%. Exports of fresh grapes and apple juice increased by 95% and 93% respectively and dried grapes (raisins) by 31%. Exports of raw cane sugar, mandarins and wine (less or equal to 2 litres) decreased by 35%, 26% and 3% respectively. South Africa enjoyed mostly zero tariffs up to 2024. Current baseline tariffs are 10% plus MFN, with the threat tied to geopolitics that tariffs can go to levels of 30% or 40% or more introducing major uncertainty for exporters.

Table 23: South Africa's top 10 exports of agricultural products to the United States

South Africa's exports* at HS 6-digit level to	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Applied average** tariff on imports from South Africa into USA (2024)	AGOA Status ***8
United States	**9,310.4**	**10,197.8**	***100.0***	***9.5***		
Products (Top 10)	**5,512.3**	**5,700.2**	***55.9***	***3.4***		
HS080262*** Shelled macadamia nuts	649.7	946.5	*9.3*	*45.7*	0.0%	D
HS080510*** Oranges	1,023.6	855.5	*8.4*	*-16.4*	0.0%	D
HS080521*** Mandarins	1,033.5	769.7	*7.5*	*-25.5*	0.0%	D
HS210500*** Ice cream and other edible ice	602.0	602.2	*5.9*	*0.0*	0.0%	D
HS220421*** Wine (≤ 2 litres)	615.4	595.1	*5.8*	*-3.3*	0.0%	D
HS080620*** Dried grapes	375.2	492.6	*4.8*	*31.3*	0.0%	D
HS200979 Apple juice	233.5	449.6	*4.4*	*92.5*	0.0%	NONE

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[8] AGOA eligible, status indicators are D=Denoted to Qualify, AP=Qualify but Apparel Provisions), D/AP=Mixed states at lower then HS6, None= Not included. Note if non-zero tariff with D or AP status, indicates that at lower than H 6-digit designations differ across sub-tariff codes.

HS170114*** Raw cane sugar excl. HS171013	513.5	335.7	*3.3*	*-34.6*	15.0%	D
HS080610*** Fresh grapes	168.1	327.4	*3.2*	*94.8*	0.0%	D
HS081340*** Dried fruit n.e.c. in heading no. 0812	297.8	325.8	*3.2*	*9.4*	0.0%	D

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Exports include re-exports, totals including BELN flows*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*
**** AGOA eligible, status indicators are D=Denoted to Qualify, AP=Qualify but Apparel Provisions), D/AP=Mixed states at lower then HS6, None=Not included*
Note if non-zero tariff with D or AP status, indicates that at lower than H 6-digit designations differ across sub-tariff codes

Imports from the USA

South Africa's overall imports from the USA decreased by 4% from 2023 to 2024 while imports of the top 10 products decreased by only 1%. Soya bean was the largest import with a share of 10%. Imports of vegetable seed for sowing increased by 98% while wholesale dog or cat food increased by 60%. Imports of frozen chicken cuts were drastically down by 63%. Dextrin and other modified starches decreased by 43% while imports of whiskies decreased by 33%. Products from the USA that continue to meet significant pressure connected to regulatory issues include chicken cuts and certain pork meat cuts.

Table 24: South Africa's top 10 imports of agricultural products from the United States

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Applied average** tariff on imports from United States into South Africa
United States	**4,328.3**	**4,144.5**	***100.0***	***-4.2***	
Products (Top 10)	**2,180.5**	**2,157.2**	***52.1***	***-1.1***	
HS120190 Soya beans	-	399.7	*9.6*	-	0.0%
HS210690 Food preparations; not elsewhere in item no. 2106.10	332.7	351.3	*8.5*	*5.6*	6.4%
HS080212 Shelled almond nuts	328.2	304.5	*7.3*	*-7.2*	0.0%
HS020714 Frozen chicken cuts	620.4	232.4	*5.6*	*-62.5*	0.0%

South Africa's imports* at HS 6-digit level from	Values (Mn Rand) 2023	Values (Mn Rand) 2024	% Share on total exports by value in 2024	% Change from 2023 to 2024	Applied average** tariff on imports from United States into South Africa
HS220830 Whiskies	313.7	209.9	*5.1*	*-33.1*	0.0%
HS230990 Dog or cat food, not for retail	103.5	165.9	*4.0*	*60.3*	12.9%
HS120991 Vegetable seeds for sowing	73.0	144.8	*3.5*	*98.3*	0.0%
HS100510 Maize seed	117.2	124.2	*3.0*	*6.0*	0.0%
HS210390 Mixed condiments and mixed seasonings	104.0	117.1	*2.8*	*12.6*	2.1%
HS350510 Dextrin and other modified starches	187.7	107.3	*2.6*	*-42.8*	0.0%

Table notes:
South Africa's agricultural trade flow from / to in million Rand (South African Revenue Services (SARS), Department of Customs and Excise Trade Statistics [March 2025 release, compiled by Trade Research Advisory]).
** Notes: Imports include re-imports, totals including BELN flows.*
*** Average = ad valorem equivalent tariff as obtained from Market Access Map, International Trade Centre, www.macmap.org*

Appendix A: Country groups

Africa	AfCFTA	AU-SADC	SADC FTA	BRICS+	EFTA	EU	MERCOSUR-4	Asia	GCC
Algeria	Algeria	Algeria	-	Brazil	Lichtenstein	Austria	Argentina	Afghanistan	Bahrain
Botswana	Botswana	-	Botswana	India	Switzerland	Belgium	Brazil	Azerbaijan	Kuwait
Angola	Angola	-	Angola	Russia	Iceland	Bulgaria	Paraguay	Bangladesh	Oman
Benin	-	Benin	-	China	Norway	Croatia	Uruguay	Armenia	Qatar
Burkina Faso	Burkina Faso	Burkina Faso	-	South Africa		Cyprus		Bhutan	Saudi Arabia
Burundi	Burundi	Burundi	-	Egypt		Czech Republic		British Indian Ocean Territories	UAE
Cameroon	Cameroon	Cameroon	-	Ethiopia		Denmark		Brunei Darussalam	
Central African Republic	Central African Republic	Central African Republic	-	Indonesia		Estonia		Myanmar	
Comoros	Comoros	-	Comoros	Iran		Finland		Cambodia	
Côte D'Ivoire	Côte d'Ivoire	Côte d'Ivoire	-	UAE		France		Sri Lanka	
DRC	DRC	-	DRC			Germany		China	
Djibouti	Djibouti	Djibouti	-			Greece		Taiwan	
Equatorial Guinea	Equatorial Guinea	Equatorial Guinea	-			Hungary		Christmas Islands	
Eritrea	-	Eritrea	-			Ireland		Cocos Islands	
Eswatini	Eswatini	-	Eswatini			Italy		Georgia	
Ethiopia	Ethiopia	Ethiopia	-			Latvia		Occupied Palestinian Territory	
Gabon	Gabon	Gabon	-			Lithuania		Hong Kong	
Gambia	Gambia	Gambia	-			Luxembourg		India	
Ghana	Ghana	Ghana	-			Malta		Indonesia	
Guinea-Bissau	Guinea-Bissau	Guinea-Bissau	-			Netherlands		Iran	
Kenya	Kenya	Kenya	-			Poland		Japan	
Lesotho	Lesotho	-	Lesotho			Portugal		Kazakhstan	
Liberia	-	Liberia	-			Romania		Korea (North - DPR)	
Libya	-	Libya	-			Slovakia		South Korea	
Madagascar	-	-	Madagascar			Slovenia		Kyrgyzstan	
Cape Verde	Cape Verde	Cape Verde	-			Spain		Lao People's Democratic Republic	
Malawi	Malawi	-	Malawi			Sweden		Macao	
Egypt	Egypt	Egypt	-					Malaysia	
Mali	Mali	Mali	-					Maldives	
Mauritania	Mauritania	Mauritania	-					Mongolia	
Morocco	Morocco	Morocco	-					Nepal	
Mozambique	Mozambique	-	Mozambique					Pakistan	
Guinea	Guinea	Guinea	-					Philippines	

Africa	AfCFTA	AU-SADC	SADC FTA	BRICS+	EFTA	EU	MERCOSUR-4	Asia	GCC
Chad	Chad	Chad	-					Timor-Leste	
Niger	Niger	Niger	-					Russia	
Nigeria	Nigeria	Nigeria	-					Singapore	
Congo	Congo	Congo	-					Viet Nam	
Rwanda	Rwanda	Rwanda	-					Syrian Arab Republic	
Sao Tome And Principe	Sao Tome and Principe	Sao Tome And Principe	-					Tajikistan	
Mauritius	Mauritius	-	Mauritius					Thailand	
Senegal	Senegal	Senegal	-					Turkey	
Seychelles	Seychelles	-	Seychelles					Turkmenistan	
Sierra Leone	Sierra Leone	Sierra Leone	-					Uzbekistan	
Namibia	Namibia	-	Namibia					Yemen	
South Africa	South Africa	-	South Africa						
Somalia	-	Somalia	-						
South Sudan	-	South Sudan	-						
Sudan	-	Sudan	-						
Tanzania	Tanzania	-	Tanzania						
Togo	Togo	Togo	-						
Tunisia	Tunisia	Tunisia	-						
Uganda	Uganda	Uganda	-						
Western Sahara	Western Sahara	Western Sahara	-						
Zambia	Zambia	-	Zambia						
Zimbabwe	Zimbabwe	-	Zimbabwe						

Appendix B: Technical note on growth rates used in this report

Compound annual growth rate (CAGR):

The Compound Annual Growth Rate (CAGR) is a measure of the mean annual growth rate of an investment, revenue, or other metric (such as the value of imports or exports in this report) over a period of time longer than one year, assuming the growth compounds annually (meaning that it indicates the percentage per year that the initial value has to grow to reach the last value in the period – on a ‘straight-line’ basis.

Formula:

CAGR = (Ending Value / Beginning Value)^(1 / n) - 1

Where:

Ending Value = Value at the end of the period

Beginning Value = Value at the beginning of the period

n = Number of years

^ = ‘to the power’ operator

Trend Growth using Least Squares Straight Line Method:

The trend growth using the Least Squares Straight Line method is a statistical technique used to estimate the long-term growth trend in a time series by fitting a straight line that minimizes the sum of squared deviations from the actual data points. The Least Squares method fits a straight line to a time series to estimate the trend component by minimizing the sum of squared deviations from the actual data points.

Linear Trend Equation:

$Y_t = a + b_t X_t$

Where:

Y_t = Trend value in year t

a = Intercept (value when t = 0)

b = Slope (average annual growth rate)

X_t = Observed actual data value at point t

t = Time period, coded as -n to +n (centered around 0)

To calculate a and b:

If the time values are centered such that $\sum t = 0$:

$a = \sum Y / n$

$b = \sum(tY) / \sum(t^2)$