

**A SOUTH AFRICAN EXPORT OPPORTUNITY SCAN FOR VALUE-ADDED
AGRICULTURAL PRODUCTS**

Compiled by

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for

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LIST OF ABBREVIATIONS

ASEAN	ASSOCIATION OF SOUTH-EAST ASIAN NATIONS
CARICOM	CARIBBEAN COMMUNITY AND COMMON MARKET
EFTA	EUROPEAN FREE TRADE ASSOCIATION
FAO	FOOD AND AGRICULTURAL ORGANISATION
HS	HARMONISED SYSTEM
IT	INFORMATION TECHNOLOGY
ITC	INTERNATIONAL TRADE CENTRE
LDCS	LESS DEVELOPED COUNTRIES
NAFTA	NORTH AMERICAN FREE TRADE AGREEMENT
PPI	PRODUCT PERFORMANCE INDEX
SA	SOUTH AFRICA
SAARC	SOUTH ASIAN ASSOCIATION FOR REGIONAL COOPERATION
SACU	SOUTH AFRICAN CUSTOMS UNION
SADC	SOUTH AFRICAN DEVELOPMENT COMMUNITY
TPI	TRADE PERFORMANCE INDEX
UK	UNITED KINGDOM
USD	UNITED STATES DOLLAR
USDA	UNITED STATES DEPARTMENT OF AGRICULTURE

1. INTRODUCTION

South African and global trade is greatly affected by the growth and stability of world markets. Global food demand is altered by changes in world population, economic growth, and income. Other factors affecting trade are global supplies and prices, changes in exchange rates, government support of agriculture, and trade policies.

Within the next 20 years, the world will gain another 1.4 billion people. Representing a 25-percent increase in global population, most of these people will live in the expanding urban centres of developing countries and will add greatly to the world's demand for food. Prospects are good that economic growth in developing countries will continue, raising the incomes and improving the diets of the 5 billion people currently living in those countries. Demand for meats, vegetables, fruits, dairy products, vegetable oils, processed foods, beverages and other goods will soar as consumers use their higher incomes to diversify their diets away from grains and other staple foods. Economic growth also means increasing urbanisation and, for many households, an end to growing their own food and a rise in the tendency to purchase food from supermarkets and convenience stores. These trends are already well underway, and urban retailers are tapping supplies from home-country producers, as well as from around the world – to the extent their governments will allow (USDA, 2004).

Meeting these increased food demands will be an enormous challenge and opportunity for the world's agricultural producers.

Under current global trade rules, government policies often misdirect agricultural resources toward the production patterns of the past. Such policies are ill suited to satisfying evolving consumer demand in global food markets. In contrast, global agricultural policy reform offers economic gains in which billions of people could share.

1.1 Current trends in world agricultural trade

The past few decades have seen periods of rapid trade growth in developed and developing countries. This growth has been aided by the growth of the world economy and the lowering of trade barriers, as well as increased supply capabilities. From literature the following key trends in international agricultural trade are highlighted (FAO, 2005):

- The global economy, including agriculture, is integrating rapidly through trade. The rate of growth in agricultural trade over the past decade has been about 3 percent annually, more than three times the rate of agricultural output growth.

- Developing countries are much less dependent on agricultural exports now than in the past.
- Developing countries are rapidly becoming their own best markets for agricultural exports.
- Exports of processed agricultural products are expanding rapidly, driven by demographic, social and economic trends.
- Supermarkets are emerging as a major force in developing countries.
- The LDCs are now much less integrated into the world economy than are developing countries as a whole, and this is particularly striking for their agriculture sectors. In contrast with the growing importance of processed agricultural exports in other developing countries, the LDCs have seen the share of their processed product exports decline from around 30 percent of total agricultural exports in the 1960s to less than 20 percent in the 1990s.

2. TRADE PERFORMANCE INDICATORS

All data used in this report is the most recent data available.

2.1 Methodology

The International Trade Centre (ITC) developed the Trade Performance Index (TPI) to assess and monitor the dimensions of export performance by sector and by country. This is done by calculating the level of competitiveness and diversification of a particular export sector using comparisons with other countries. The TPI monitors the evolution of export diversification for products and markets.

The TPI calculates two composite rankings, namely the overall position and ranking of a country and sector, and changes in performance.

The composite ranking referring to overall position is based on the following criteria:

- Value of net exports
- Per capita exports
- World market shares
- Diversification of products
- Diversification of markets

The composite ranking referring to changes in performance is based on the following criteria:

- Change in world market share

- Change in cover ratio
- Level of specialisation
- Changes in product diversification
- Changes in market diversification

Table 1 reports on the trade performance of fresh food, processed food, wood products and textiles respectively. In terms of fresh food it is evident from Table 1 that South Africa is a net exporter of fresh foods. Trends from 1999 to 2003 indicate that exports increased by 6 percent per annum and contributed 6 percent to total national exports within this period. The South African fresh food sector had a 0.68 percent share of the world market in 2003. This world market share increased by 2.53 percent per annum between 1999 and 2003. This increase in market share could be explained by an increase in the competitiveness of South African fresh food exports (2.44% per annum) between 1999 and 2003. When taking the above into account, the sector reported an absolute world market gain of 0.0273 percentage points per annum.

In the processed food sector, South Africa reported net exports for 2003. Annual per capita exports increased by 7 percent between 1999 and 2003, and contributed 5 percent to national exports. South Africa secured 0.51 percent of the world market share in 2003, but showed a decline in world market share of 2.44 percent per annum between 1999 and 2003, mainly due to the decline in competitiveness of 0.26 percent per annum from 1999 to 2003. Notwithstanding this loss in competitiveness, an absolute world market gain of 0.0037 percent per annum was achieved.

The wood product sector also reported net exports for 2003. This sector showed an increase of 17 percent per annum between 1999 and 2003 and contributed 4 percent to national exports. In this sector South Africa secured 0.60 percent of the world market share and showed a relatively small increase of 0.26 percent in world market share per annum. An increase of 1.44 percent in competitiveness per annum was achieved, which indicates that South Africa became increasingly more competitive between 1999 and 2003. When taking the above into account, the sector reported an absolute world market gain of 0.0293 percentage points per annum.

From Table 1 it is evident that the textile sector is a net importer, but in spite of this it reported an increase in exports of 13 percent per annum from 1999 to 2003 and contributed over 1 percent to national exports. South Africa secured 0.16 percent of the world market for these products, with an increase of 2.41 percent per annum in their competitiveness for market share from 1999 to 2003. Despite the increase in competitiveness, South Africa still showed a decline of 0.22 percent per annum in relative market share. Notwithstanding a loss in competitiveness, an absolute world market gain of 0.0135 percentage points per annum was achieved.

The TPIs for chemicals, basic manufacturing, non-electronic machinery, IT and consumer electronics, electronic components, transport equipment, miscellaneous manufacturing and minerals are available in Annexure A. It is evident from these tables that all these sectors have shown an increase in absolute world market share between 1999 and 2003, with the exception of the chemicals sector, which reported a 0.0002 percent loss in absolute world market share.

Table 1: TPI for South Africa

Indicators		South Africa	Fresh food		Processed food		Wood products		Textiles		
			Value	Rank (173)**	Value	Rank (146)**	Value	Rank (125)**	Value	Rank (112)**	
General Profile	G1	Value of exports (\$ 000)	2,027,219		1,496,983		1,281,642		293,094		
	G2	Trend of exports (99 - 03) p.a.	6%	97	7%	104	17%	40	13%	50	
	G3	Share in national exports	6%		5%		4%		1%		
	G4	Share in national imports	3%		3%		2%		2%		
	G5	Average annual change in per capita exports	9%	38	7%	67	7%	36	12%		
	G6	Relative unit value (world average = 1)									
	G7	Average annual change in relative unit value									
Position in 2003 (Current Index)	P1	Value of net exports (\$ 000)	951,476	23	522,401	20	586,973	15	-341,990	89	
	P2	Per capita exports (\$/inhabitant)	45	84	33.3	85	28.5	53	6.5	69	
	P3	Share in world market	0.68%	30	0.51%	33	0.60%	31	0.16%	47	
	P4a	Product diversification (N° of equivalent products)	26	14	13	36	10	53	29	36	
	P4b	Product spread (concentration)		11		25		37		33	
	P5a	Market diversification (N° of equivalent markets)	19	4	19	7	16	5	18	5	
	P5b	Market spread (concentration)		4		9		10		11	
Change 1999-2003 (Change Index)	C1	Relative change in world market share (% p.a.)	2.53%		-2.44%		0.26%		-0.22%		
		Sources	Competitiveness effect p.a.	2.44%	49	-0.26%	84	1.44%	51	2.41%	31
			Initial geographic specialisation p.a.	1.83%	53	-0.26%	96	-0.50%	82	-1.18%	94
			Initial product specialisation p.a.	0.23%	71	0.44%	58	0.56%	61	3.84%	14
		Adaptation p.a.	-1.98%	130	-2.36%	116	-1.24%	93	-5.29%	100	
	C2	Trend of import coverage by exports	-2%	81	-1%	73	-2%	73	7%	27	
	C3	Matching with dynamics of world demand		101		88		45		21	
	C4a	Change in product diversification (N° of equiv. products)		89		88		25		11	
	C4b	Change in product spread (concentration)		90		89		26		13	
C5a	Change in market diversification (N° of equiv. markets)		69		75		46		30		
C5b	Change in market spread (concentration)		74		82		49		37		
Indicators included in chart	A	Absolute change in world market share (% points p.a.)	0.0273%	16	0.0037%	46	0.0293%	15	0.0135%	21	
	P	Current Index		14		20		18		36	
	C	Change Index		88		111		24		10	

Tables 2.1 to 2.5 show the Product Performance Indicators (PPIs) for various agricultural commodities. From Table 2.1 it is clear that animal feed displayed the highest average annual change in per capita exports (68.4%), (also if compared to Tables 2.2 to 2.5) while beverages and cereal products & rice showed increases of 9.9 and 5.7 percent respectively. Beverages claimed the highest share of national exports (2.1%), as well as the highest export value of 643 262 thousand USD, but compared to Table 2.4 the Fruit and vegetable sector performed better.

Table 2.1: Product performance for animal feed, beverages, and cereal products & rice

Product Performance Table										
Indicators			Value	Rank	Value	Rank	Value	Rank		
			Animal feed		Beverages		Cereal products and rice			
General Profile	G1	Value of exports (in thousand US\$)	42,381		643,262		151,515			
	G2	Trend of exports (1999-2003) p.a.	52.5%	7	6.1%	78	5.3%	53		
	G3	Share in national exports	0.1%		2.1%		0.5%			
	G4	Share in national imports	0%		0.5%		1.3%			
	G5	Average annual change in per capita exports	68.4%	5	9.9%	58	5.7%	38		
	G6	Relative unit value (world average = 1)	0		0		0			
	G7	Average annual change in relative unit value	0%		0%		0%			
Position in 2003 (Current Index)	P1	Value of net exports (in thousand US\$)	28,855	10	492,362	9	241,590	76		
	P2	Per capita exports (US\$ per inhabitant)	0.94	31	14.30	40	3.37	48		
	P3	Share in world market	1%	22	1.3%	16	0.4%	30		
	P4a	Product diversification (N° of equivalent products)	3	13	3	54	2	60		
	P4b	Product spread (concentration)		12		30		30		
	P5a	Market diversification (N° of equivalent markets)	7	11	8	18	4	48		
	P5b	Market spread (concentration)		9		8		28		
Change 1999-2003 (Change Index)	C1	Percentage change in world market share p.a.		0.1%		0%		0%		
		Sources	Competitiveness effect p.a.		0.1%	9	0%	50	-0%	78
			Initial geographic specialisation p.a.		0.1%	7	0%	50	0.1%	13
			Initial product specialisation p.a.		-0.1%	53	0%	48	-0%	52
			Adaptation p.a.		-0.1%	51	-0%	77	-0%	66
	C2	Trend of import coverage by exports		37.4%	11	3.4%	55	-5.5%	63	
	C3	Matching with dynamics of world demand			4		76		25	
	C4a	Change in product diversification (N° of equiv. products)			14		46		47	
	C4b	Change in product spread (concentration)			12		50		47	
	C5a	Change in market diversification (N° of equivalent markets)			34		73		88	
C5b	Change in market spread (concentration)			34		74		85		
Composite Indices	Current Index			11		9		43		
	Change Index			1		80		73		

Source: International Trade Centre: www.p-maps.org

Table 2.2 shows the PPI for cocoa & cocoa products, coffee & coffee products, and cut flowers & ornamental plants. Cocoa & cocoa products and cut flowers & ornamental plants showed increases in average annual change in per capita exports of 3.9 and 8.6 percent respectively, while coffee & coffee products declined by 0.3 percent. Of the products included in Table 2.2, cut flowers & ornamental plants had the largest share in the world market (0.4%).

Table 2.2: Product performance for cocoa & cocoa products, coffee & coffee products, and cut flowers & ornamental plants

Product Performance Table										
Indicators			Value	Rank	Value	Rank	Value	Rank		
			Cocoa and cocoa products		Coffee and coffee products		Cut flowers and ornamental plants			
General Profile	G1	Value of exports (in thousand US\$)	23,392		6,958		45,648			
	G2	Trend of exports (1999-2003) p.a.	44.6%	7	14.8%	14	6.8%	39		
	G3	Share in national exports	0.1%		0%		0.1%			
	G4	Share in national imports	0.2%		0.1%		0%			
	G5	Average annual change in per capita exports	3.9%	61	-0.3%	29	8.6%	24		
	G6	Relative unit value (world average = 1)	0		0		0			
	G7	Average annual change in relative unit value	0%		0%		0%			
Position in 2003 (Current Index)	P1	Value of net exports (in thousand US\$)	-22,375	56	22,895	55	39,078	15		
	P2	Per capita exports (US\$ per inhabitant)	0.52	69	0.15	73	1.01	32		
	P3	Share in world market	0.1%	48	0.1%	59	0.4%	23		
	P4a	Product diversification (N° of equivalent products)	3	19	3	2	5	4		
	P4b	Product spread (concentration)		21		3		6		
	P5a	Market diversification (N° of equivalent markets)	4	45	7	18	4	23		
	P5b	Market spread (concentration)		29		32		13		
Change 1999-2003 (Change Index)	C1	Percentage change in world market share p.a.		-0.1%		0%		0%		
		Sources	Competitiveness effect p.a.		-0.1%	86	0%	34	0%	24
			Initial geographic specialisation p.a.		0%	28	-0%	72	0%	29
			Initial product specialisation p.a.		-0.1%	91	0.1%	20	0%	33
			Adaptation p.a.		0.1%	7	-0%	74	-0%	41
	C2	Trend of import coverage by exports		-4.7%	54	-4.8%	43	3.2%	29	
	C3	Matching with dynamics of world demand			67		27		57	
	C4a	Change in product diversification (N° of equiv. products)			6		72		22	
	C4b	Change in product spread (concentration)			7		68		20	
	C5a	Change in market diversification (N° of equiv. markets)			12		6		50	
C5b	Change in market spread (concentration)			14		6		48		
Composite Indices	Current Index			46		41		9		
	Change Index			13		29		46		

Source: International Trade Centre: www.p-maps.org

Table 2.3 shows the PPI for dairy products, fragrances & flavours, as well as fruit & vegetable juices. The average annual change in per capita exports for the respective products was 5.6, 3.6 and 5.3 percent respectively. All the products included in Table 2.3 showed increasing shares in the world market, with fruit & vegetable juices showing the highest growth rate (1.4%).

Table 2.3: Product performance for dairy products, fragrances & flavours, and fruit & vegetable juices

Product Performance Table			Value		Rank		Value		Rank		
Indicators			Value	Rank	Value	Rank	Value	Rank	Value	Rank	
			Dairy products		Fragrances and flavours		Fruit and vegetable juices				
General Profile	G1	Value of exports (in thousand US\$)	44,073		30,985		104,925				
	G2	Trend of exports (1999-2003) p.a.	11.5%	41	6.4%	40	4.5%	44			
	G3	Share in national exports	0.1%		0.1%		0.3%				
	G4	Share in national imports	0.1%		0.3%		0%				
	G5	Average annual change in per capita exports	5.6%	51	3.6%	47	5.3%	35			
	G6	Relative unit value (world average = 1)	0		0		0				
	G7	Average annual change in relative unit value	0%		0%		0%				
Position in 2003 (Current Index)	P1	Value of net exports (in thousand US\$)	3,111	29	49,252	43	92,809	9			
	P2	Per capita exports (US\$ per inhabitant)	0.98	61	0.69	42	2.33	35			
	P3	Share in world market	0.1%	48	0.2%	31	1.4%	14			
	P4a	Product diversification (N° of equivalent products)	7	12	5	4	5	4			
	P4b	Product spread (concentration)		10		3		5			
	P5a	Market diversification (N° of equivalent markets)	6	27	15	6	11	2			
	P5b	Market spread (concentration)		25		14		1			
Change 1999-2003 (Change Index)	C1	Percentage change in world market share p.a.		-0%		-0.1%		0%			
		Sources	Competitiveness effect p.a.		-0%	59	-0%	36	0%	28	
			Initial geographic specialisation p.a.		0%	13	-0%	59	0%	37	
			Initial product specialisation p.a.		-0%	63	-0%	42	0%	58	
			Adaptation p.a.		-0%	59	-0%	44	-0%	48	
	C2	Trend of import coverage by exports		3.3%	35	8.5%	18	-9.9%	55		
	C3	Matching with dynamics of world demand			19		38		37		
	C4a	Change in product diversification (N° of equiv. products)			50		17		64		
	C4b	Change in product spread (concentration)			58		18		70		
	C5a	Change in market diversification (N° of equivalent markets)			27		3		16		
C5b	Change in market spread (concentration)			29		4		19			
Composite Indices	Current Index			30		18		3			
	Change Index			34		13		50			

Source: International Trade Centre: www.p-maps.org

Table 2.4 shows the PPI for fruit & vegetables, hides, skins, furskins & leather, as well as leather products. Fruit & vegetables and leather products show average annual increases in per capita exports of 9.2 and 12.2 percent respectively, while hides, skins, furskins & leather showed a decline of 0.5 percent per annum between 1999 and 2003. Fruit & vegetables had the highest export value (959 233 thousand USD)

Table 2.4: Product performance for fruit & vegetables, hides, skins, furskins & leather, and leather products

Product Performance Table										
Indicators			Value	Rank	Value	Rank	Value	Rank		
			Fruit and vegetables		Hides, skins, furskins and leather		Leather products			
General Profile	G1	Value of exports (in thousand US\$)	959,233		171,638		13,900			
	G2	Trend of exports (1999-2003) p.a.	4.5%	84	13.6%	73	22.8%	19		
	G3	Share in national exports	3.1%		0.6%		0%			
	G4	Share in national imports	0.3%		0.3%		0.2%			
	G5	Average annual change in per capita exports	9.2%	40	-0.5%	97	12.2%	19		
	G6	Relative unit value (world average = 1)	0		0		0			
	G7	Average annual change in relative unit value	0%		0%		0%			
Position in 2003 (Current Index)	P1	Value of net exports (in thousand US\$)	870,613	8	74,883	25	37,269	56		
	P2	Per capita exports (US\$ per inhabitant)	21.32	34	3.81	48	0.31	66		
	P3	Share in world market	1.5%	14	0.6%	31	0.1%	44		
	P4a	Product diversification (N° of equivalent products)	8	38	6	8	4	33		
	P4b	Product spread (concentration)		24		10		32		
	P5a	Market diversification (N° of equivalent markets)	11	5	5	43	9	6		
	P5b	Market spread (concentration)		8		19		21		
Change 1999-2003 (Change Index)	C1	Percentage change in world market share p.a.		0%		-0.1%		0%		
		Sources	Competitiveness effect p.a.		0%	36	-0%	93	-0%	38
			Initial geographic specialisation p.a.		0%	72	-0%	68	-0%	50
			Initial product specialisation p.a.		0%	54	0%	74	0.1%	12
			Adaptation p.a.		-0%	89	-0%	72	-0%	56
	C2	Trend of import coverage by exports		-2%	66	-5.8%	88	8.5%	11	
	C3	Matching with dynamics of world demand			46		63		10	
	C4a	Change in product diversification (N° of equiv. products)			60		20		39	
	C4b	Change in product spread (concentration)			62		22		40	
	C5a	Change in market diversification (N° of equivalent markets)			32		12		40	
C5b	Change in market spread (concentration)			36		14		40		
Composite Indices	Current Index			7		18		42		
	Change Index			47		50		7		

Source: International Trade Centre: www.p-maps.org

Table 2.5 shows the PPI for live animals, meat & animal products, medicinal plants and nuts, with respective average annual changes in per capita exports of 31.7, 3.6, 25.1 and 11.2 percent.

Table 2.5: Product performance for live animals, meat & animal products, medicinal plants, and nuts

Product Performance Table			Value		Rank		Value		Rank		
Indicators			Value	Rank	Value	Rank	Value	Rank	Value	Rank	
			Live animals		Meat and animal products		Medicinal plants		Nuts		
General Profile	G1	Value of exports (in thousand US\$)	14,643		79,238		15,484		29,713		
	G2	Trend of exports (1999-2003) p.a.	32%	9	4.6%	59	22.8%	5	11.3%	25	
	G3	Share in national exports	0%		0.3%		0%		0.1%		
	G4	Share in national imports	0%		0.5%		0%		0%		
	G5	Average annual change in per capita exports	31.7%	7	3.6%	51	25.1%	2	11.2%	22	
	G6	Relative unit value (world average = 1)	0		0		0		0		
	G7	Average annual change in relative unit value	0%		0%		0%		0%		
Position in 2003 (Current Index)	P1	Value of net exports (in thousand US\$)	4,039	30	68,042	81	13,863	5	16,364	20	
	P2	Per capita exports (US\$ per inhabitant)	0.33	46	1.76	64	0.34	14	0.66	36	
	P3	Share in world market	0.2%	35	0.1%	34	1.6%	14	0.6%	25	
	P4a	Product diversification (N° of equiv. products)	3	8	4	41	1	22	1	53	
	P4b	Product spread (concentration)		9		25		33		37	
	P5a	Market diversification (N° of equiv. markets)	3	19	12	2	2	35	4	25	
	P5b	Market spread (concentration)		16		14		23		25	
Change 1999-2003 (Change Index)	C1	Percentage change in world market share p.a.		0%		-0%		0.2%		0%	
		Sources	Competitiveness effect p.a.		0.1%	7	0%	49	0.2%	9	0%
			Initial geographic specialisation p.a.		-0%	47	0%	28	0%	16	-0%
			Initial product specialisation p.a.		-0%	48	-0%	68	-0%	36	-0%
			Adaptation p.a.		-0%	48	-0%	82	0%	4	-0%
	C2	Trend of import coverage by exports		7.3%	24	0.5%	40	33.5%	4	12.2%	
	C3	Matching with dynamics of world demand			45		72		32	35	
	C4a	Change in product diversification (N° of equiv. products)			8		24		15	35	
	C4b	Change in product spread (concentration)			9		24		14	39	
C5a	Change in market diversification (N° of equiv. markets)			5		61		40	10		
C5b	Change in market spread (concentration)			9		70		26	10		
Composite Indices	Current Index			25		32		16		28	
	Change Index			10		60		6		17	

Source: International Trade Centre: www.p-maps.org

Figure 1 plots the ranking of international competitiveness in terms of static indicators (Current Index) and dynamic indicators (Change Index). Position one in the ranking refers to the best performance out of 189 countries. From Figure 1 it is clear that fruit & vegetable juices exported by South Africa are ranked number 3 in the world in terms of performance followed by fruit & vegetables and cut flowers & ornamental plants. (The factors determining trade performance are shown in Tables 2.1 to 2.5).

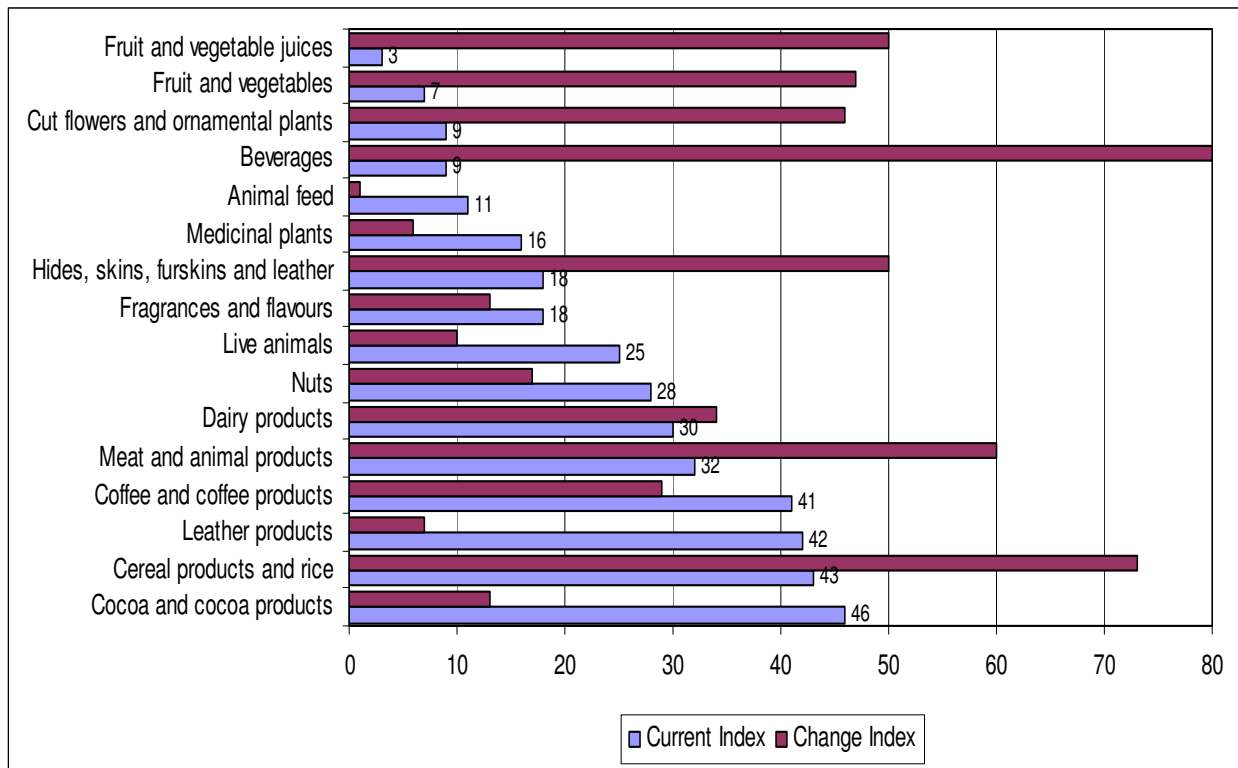


Figure 1: Product performance for South Africa (Current Index: 2003; Change Index 1999 to 2003)

Table 3 shows South Africa's revealed comparative advantage in exports according to the Balassa formula. The index compares the share of a given sector in national exports with the share of this sector in world exports. For a country to be a specialist in the sector under review, the value of the revealed comparative advantage must be **greater than one**. Table 3 shows that South Africa has a revealed competitive advantage in the areas **fresh food, processed food**, minerals, and wood products.

Table 3: South African revealed comparative advantages (2003)

SOUTH AFRICA	Rank	Revealed comparative advantage
Fresh food	104	1.51
Clothing	102	0.28
Textiles	90	0.36
Processed food	89	1.13
Electronic components	76	0.16
Miscellaneous manufacturing	76	0.43
IT and consumer electronics	64	0.12
Minerals	62	1.86
Wood products	49	1.35
Chemicals	46	0.71
Transport equipment	31	0.84
Non-electronic machinery	28	0.76
Basic manufactures	8	3.79

Source: International Trade Centre: www.p-maps.org

3. SOUTH AFRICAN AGRICULTURAL TRADE FLOWS

Data for this section was made available by the Department of Trade and Industry (www.dti.gov.za)

Table 4 shows South Africa's total exports and imports for the main trading sectors from 1994 to 2004. Total exports dropped by 12.26 percent in 2003, but gained 7.5 percent in 2004. All sectors reported negative growth rates during 2003. Growth in the agricultural, mining and manufacturing sectors declined by 4.68, 21.13 and 7.45 percent respectively, but reported growth rates of 1.04, 3.63 and 9.96 percent respectively in 2004. In terms of the share in total exports, the agricultural sector's share declined from 4.82 percent in 2003 to 4.53 percent in 2004. The manufacturing sector holds the largest share in South Africa's exports (63.2%).

Table 4 also shows the South African imports for the main trading sectors. Like exports, total imports also declined during 2003 (6.02%). The imports of the individual sectors also declined, with the agricultural, mining and manufacturing sectors declining by 16.25, 6.32 and 5.67 percent respectively in 2003, but reporting gains of 12, 33.93 and 15.98 percent respectively in 2004. In 2004,

agricultural imports only contributed 1.82 percent to total imports, while the manufacturing sector contributed 82.78 percent to total imports. The contribution of the agricultural sector did not change much during the period 1994 to 2004. South Africa remained a net exporter of agricultural products for the period 1994 to 2004.

Table 4: Total value of South African exports and imports in the main trading sectors

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Exports Rand Million											
Total	90,234	102,124	115,403	131,537	144,953	165,555	210,373	251,330	314,102	275,581	296,246
Agriculture	4,689	4,315	5,748	5,972	6,999	8,115	7,862	10,174	13,944	13,291	13,430
Mining	45,261	45,006	47,301	52,102	57,870	62,749	79,905	95,251	115,798	91,334	94,645
Manufacturing	38,983	51,300	61,483	72,722	79,276	93,699	121,673	145,220	183,859	170,166	187,122
Other Trade	1,301	1,503	872	741	809	992	933	685	501	790	1,050
Percentage Share											
Agriculture	5.2	4.23	4.98	4.54	4.83	4.9	3.74	4.05	4.44	4.82	4.53
Mining	50.16	44.07	40.99	39.61	39.92	37.9	37.98	37.9	36.87	33.14	31.95
Manufacturing	43.2	50.23	53.28	55.29	54.69	56.6	57.84	57.78	58.53	61.75	63.16
Other Trade	1.44	1.47	0.76	0.56	0.56	0.6	0.44	0.27	0.16	0.29	0.35
Percentage Growth											
Total	21.12	13.18	13	13.98	10.2	14.21	27.07	19.47	24.98	-12.26	7.5
Agriculture	68.41	-7.97	33.2	3.9	17.2	15.95	-3.12	29.41	37.06	-4.68	1.04
Mining	11.74	-0.56	5.1	10.15	11.07	8.43	27.34	19.21	21.57	-21.13	3.63
Manufacturing	29.46	31.6	19.85	18.28	9.01	18.19	29.86	19.35	26.61	-7.45	9.96
Other Trade	18.52	15.53	-41.99	-14.96	9.17	22.57	-5.96	-26.51	-26.89	57.6	32.93
Imports Rand Million											
Total	76,823	99,055	113,642	127,940	144,171	147,356	187,608	216,033	275,427	258,839	306,927
Agriculture	1,688	2,879	2,703	2,717	2,946	2,730	3,237	3,025	5,948	4,982	5,579
Mining	6,390	9,596	11,487	17,507	12,807	16,664	30,658	32,443	36,461	34,158	45,749
Manufacturing	68,473	86,339	99,185	107,463	128,157	127,720	153,317	180,184	232,235	219,074	254,087
Other Trade	271	241	268	254	262	242	396	381	783	626	1,512
Percentage Share											
Agriculture	2.2	2.91	2.38	2.12	2.04	1.85	1.73	1.4	2.16	1.92	1.82
Mining	8.32	9.69	10.11	13.68	8.88	11.31	16.34	15.02	13.24	13.2	14.91
Manufacturing	89.13	87.16	87.28	83.99	88.89	86.67	81.72	83.41	84.32	84.64	82.78
Other Trade	0.35	0.24	0.24	0.2	0.18	0.16	0.21	0.18	0.28	0.24	0.49
Percentage Growth											
Total	28.11	28.94	14.73	12.58	12.69	2.21	27.32	15.15	27.49	-6.02	18.58
Agriculture	-14.06	70.51	-6.12	0.52	8.44	-7.33	18.56	-6.56	96.67	-16.25	12
Mining	-8.43	50.19	19.7	52.41	-26.85	30.12	83.98	5.82	12.38	-6.32	33.93
Manufacturing	34.95	26.09	14.88	8.35	19.26	-0.34	20.04	17.52	28.89	-5.67	15.98
Other Trade	-3.41	-11.28	11.35	-5.08	2.82	-7.55	63.85	-3.91	105.69	-20.08	141.7

Source: The Department of Trade and Industry: www.dti.gov.za

South African exports by region are shown in Table 5. The major destinations for exports in 2005 were the European Union, North-East Asia, NAFTA, and the SADC. There have been no significant changes in the top ten export destinations. It is important to note the growing export markets of South Middle Asia (459%), North Africa (98%), SAARC (89%), CARICOM (54%), Central Europe (35%) and the Pacific Continent (32%) during the 2004 to 2005 period.

Table 5: South African exports by main regions

REGION	Export (R'000)				R a n k		Proportion 2005		Annual Growth 2004-2005
	Name	2005	2004	2003	2002	2005	2004	%Total	
EUROPEAN UNION	106,465,141	93,426,877	84,258,707	98,256,760	1	1	35.40%	35.40%	14.00%
NORTH-EAST ASIA	38,644,688	31,146,173	28,588,466	30,397,204	2	3	12.80%	48.20%	24.10%
NAFTA	34,618,921	33,161,481	31,055,096	38,574,499	3	2	11.50%	59.80%	4.40%
SADC	31,857,479	26,318,907	26,875,686	31,790,492	4	4	10.60%	70.40%	21.00%
CHINAS	17,672,818	18,833,797	15,052,256	13,427,070	5	5	5.90%	76.20%	-6.20%
MIDDLE EAST	13,265,728	10,217,066	9,765,024	10,984,187	6	6	4.40%	80.60%	29.80%
PACIFIC CONTINENT	10,465,716	7,922,196	6,332,008	5,767,365	7	8	3.50%	84.10%	32.10%
ASEAN	9,468,729	8,281,462	7,354,246	7,676,882	8	7	3.10%	87.30%	14.30%
SAARC	8,695,242	4,604,103	4,322,042	4,876,233	9	11	2.90%	90.20%	88.90%
EFTA & OTHER	8,258,433	7,633,254	6,138,296	6,035,305	10	9	2.70%	92.90%	8.20%
WEST AFRICA	6,905,406	5,881,072	5,398,876	5,193,265	11	10	2.30%	95.20%	17.40%
N-EAST AFRICA	4,336,377	4,234,504	3,295,458	3,600,441	12	12	1.40%	96.60%	2.40%
MERCOSUR	2,989,879	2,468,232	2,082,549	2,799,534	13	13	1.00%	97.60%	21.10%
NORTH AFRICA	1,750,061	883,012	1,195,361	1,911,896	14	17	0.60%	98.20%	98.20%
CENTRAL EUROPE	1,421,083	1,056,134	892,994	915,526	15	14	0.50%	98.70%	34.60%
INDIAN OCEAN	960,770	935,178	1,214,847	1,054,377	16	16	0.30%	99.00%	2.70%
CENTRAL AFRICA	914,623	737,708	974,031	981,320	17	18	0.30%	99.30%	24.00%
EASTERN EUROPE	911,355	1,004,887	818,517	580,387	18	15	0.30%	99.60%	-9.30%
ANDEAN	502,774	517,190	592,962	744,150	19	19	0.20%	99.80%	-2.80%
CARICOM	275,048	178,459	153,859	469,314	20	20	0.10%	99.90%	54.10%
CENTRAL AMERICA	210,569	163,808	151,679	140,202	21	21	0.10%	99.90%	28.50%
CARIBBEAN	85,411	82,423	126,640	208,131	22	22	0.00%	100.00%	3.60%
SOUTH MIDDLE ASIA	75,850	13,570	54,684	11,433	23	23	0.00%	100.00%	459.00%
Total REGIONS	300,752,101	259,701,493	236,694,284	266,396,511	25	1	100.00%	100.00%	15.80%

Source: The Department of Trade and Industry: www.dti.gov.za

Table 6 shows the top 10 destinations for South African agricultural and food exports. The UK has continued to maintain its leading position, which it has occupied since 1994, as the major destination for South African exports. The Netherlands, however, moved up from 8th position in 1994 to 2nd position in 2003, while Belgium dropped from 3rd position, which it maintained from 1994 up until 2000. Mozambique and Angola (two SADC countries) moved up to 3rd and 8th positions respectively from their long-held 5th and 10th positions. Germany, on the other hand, regained 4th position after dropping to 7th position in 2000. Noteworthy is Zimbabwe, which moved to 5th position in 2003.

Table 6: Top 10 destinations for South African agricultural and food exports (2003)

RANK 2003	COUNTRY	RANK		EXPORT VALUE IN 2003 (\$M)	EXPORT VALUE IN 2003 (RBN)	% TOTAL	CUMULATIVE SHARE
		1994	2000				
	Total			3042.33	23.000		
1	UNITED KINGDOM	1	1	414.95	3.137	13.64	13.64
2	NETHERLANDS	8	2	323.54	2.446	10.63	24.27
3	MOZAMBIQUE	5	5	165.48	1.251	5.44	29.71
4	GERMANY	4	7	162.96	1.232	5.36	35.07
5	ZIMBABWE	12	14	149.21	1.128	4.90	39.97
6	UNITED STATES	7	6	132.80	1.004	4.37	44.34
7	JAPAN	2	4	122.35	0.925	4.02	48.36
8	ANGOLA	10	10	117.33	0.887	3.86	52.22
9	BELGIUM	3	3	113.62	0.859	3.73	55.95
10	ITALY	6	9	90.61	0.685	2.98	58.93

Source: National Department of Agriculture: NDA (2004)

Table 7 shows the top 20 South African export products according to their annual growth in value between 2000 and 2004 measured in percentage, while Table 8 show the top 20 South African export products according to their value (R'000) in 2005. In both cases the products are described on an HS4 digit level.

Table 7: Annual growth in the value of agricultural exports for South Africa (Top 20) (2000-2004).

Rank	HS4	Product	Annual growth in value between 2000 & 2004, %
1	1210	Hop cones, fresh or dried	102
2	1205	Rape or colza seeds, broken or not	85
3	0905	Vanilla	82
4	1212	Locust beans	80
5	0409	Natural honey	67
6	0703	Onions, garlic and leeks, fresh or chilled	49
7	0104	Live sheep and goats	46
8	0706	Carrots, turnips and salad beetroot, fresh or chilled	45
9	0101	Live horses, asses, mules and hinnies	43
10	0103	Live swine	43
11	1007	Grain sorghum	43
12	0704	Cabbages and cauliflowers, fresh or chilled	36
13	0810	Fruits n.e.s., fresh	34
14	0808	Apples, pears and quinces, fresh	29
15	0102	Live bovine animals	27
16	1201	Soya beans, broken or not	27
17	0701	Potatoes	25
18	0801	Brazil nuts, cashew nuts and coconuts	24
19	0802	Nuts n.e.s.	23
20	0805	Citrus fruit, fresh or dried	23

Source: Trade and Industrial Policy Strategies: www.tips.org.za

From Table 8 it is evident that wine of fresh grapes, including fortified wines, and citrus fruit (fresh or dried) remained in the top 2 positions from 2004 to 2005 and reported respective growths of 10.8 and 6.9 percent in value from 2004 to 2005. These products are ranked 14th and 17th in the world in terms of export value in 2005.. Other products that reported significant growth were cereal groats, meal & pellets, which moved from position 472 in the world to the 62nd spot with a 2076 percent growth between 2004 and 2005. Maize in turn moved from ranking 52nd to 29th with a 129 percent growth over the same period. Other nuts, fresh or dried, shelled or peeled or not, moved from ranking 175th to 110th with a 109 percent growth rate.

Dates, figs, pineapples, avocados, guavas, mangoes & mangosteens, fresh or dried, as well as chocolate & other food preparations containing cocoa, grew by 43 percent from 2004 to 2005.

Table 8: Value of agricultural commodity and food exports (Top 20) (2005).

Commodities (HS4)			R a n k		Proportion 2005		Annual Growth
	2005	2004	2005	2004	%Total	Cum.	2004-2005
Wine of fresh grapes, including fortified wines	3,807,293	3,437,011	14	14	1.10%	56.50%	10.80%
Citrus fruit, fresh or dried	3,176,996	2,973,041	17	17	1.00%	59.60%	6.90%
Grapes, fresh or dried:	2,099,731	2,034,470	23	18	0.60%	63.90%	3.20%
Cane or beet sugar and chemically pure sucrose, in solid form	1,769,865	1,438,450	25	29	0.50%	65.00%	23.00%
Maize (Corn)	1,665,644	726,236	29	52	0.50%	67.10%	129.40%
Apples, pears and quinces, fresh	1,532,494	1,673,415	32	24	0.50%	68.50%	-8.40%
Fruit, nuts and other edible parts of plants, otherwise prepared or preserved, whether or not containing added sugar or other sweetening matter or spirit, not elsewhere specified or included	1,134,393	1,224,464	38	32	0.30%	70.80%	-7.40%
Fruit juices (including grape must) and vegetable juices, unfermented and not containing added sugar or other sweetening matter or spirit, not elsewhere specified or included	823,479	617,161	55	59	0.20%	75.90%	33.40%
Cereal groats, meal and pellets	680,452	31,267	62	472	0.20%	77.50%	2076.30%
Wool, not carded or combed	581,088	581,532	73	64	0.20%	79.60%	-0.10%
Wool and fine or coarse animal hair, carded or combed	468,094	544,130	92	69	0.10%	82.50%	-14.00%
Other nuts, fresh or dried, shelled or peeled or not	399,867	191,484	110	175	0.10%	84.80%	108.80%
Leather further prepared after tanning or crusting	334,019	269,977	123	127	0.10%	86.30%	23.70%
Dates, figs, pineapples, avocados guavas, mangoes and mangosteens, fresh or dried	318,222	222,092	128	153	0.10%	86.70%	43.30%
Apricots, cherries, peaches (including nectarines), plums and sloes, fresh	312,508	339,934	129	101	0.10%	86.80%	-8.10%
Raw skins of sheep or lambs	309,391	374,475	130	93	0.10%	86.90%	-17.40%
Food preparations not elsewhere specified or included	273,738	239,900	146	143	0.10%	88.30%	14.10%
Unmanufactured tobacco; tobacco refuse	234,704	270,863	158	126	0.10%	89.30%	-13.30%
Chocolate and other food preparations containing cocoa	190,846	133,459	188	216	0.10%	91.10%	43.00%
Leather of bovine or equine animals, without hair	172,704	196,759	206	173	0.10%	92.10%	-12.20%

Source: The Department of Trade and Industry: www.dti.gov.za

As shown in Table 9, of the total value of imports, 11.80 percent came from Argentina, making it the largest importer of agricultural products into South Africa in 2003. Argentina is followed by the United States with 8.12 percent, Brazil with 7.45 percent and the United Kingdom with 6.21 percent. The four SADC countries to make the top-20 list are Zimbabwe, Zambia, Malawi and Mozambique with shares of 4.33, 2.16, 1.50, and 0.54 percent respectively.

Table 9: The 20 countries with the largest food and agricultural exports into SACU: 2003

RANK	COUNTRY	1994 (\$BN)	2003 (\$BN)	1994 (RBN)	2003 (RBN)	SHARE (%)	CUM SHARE(%)	1994 RANK
	Grand Total							
1	Argentina	0.15	0.21	0.519	1.634	11.80	11.80	3
2	United States	0.15	0.15	0.547	1.124	8.12	19.92	1
3	Brazil	0.03	0.14	0.122	1.031	7.45	27.37	12
4	United Kingdom	0.15	0.11	0.528	0.860	6.21	33.58	2
5	China	0.03	0.11	0.093	0.851	6.15	39.73	14
6	Thailand	0.08	0.09	0.300	0.718	5.19	44.92	6
7	Australia	0.09	0.08	0.336	0.603	4.36	49.28	5
8	Zimbabwe	0.12	0.08	0.417	0.599	4.33	53.61	4
9	Malaysia	0.08	0.08	0.275	0.594	4.29	57.90	7
10	Germany	0.04	0.07	0.153	0.530	3.83	61.73	9
11	Netherlands	0.04	0.05	0.133	0.384	2.77	64.50	11
12	Canada	0.04	0.04	0.137	0.334	2.41	66.91	10
13	France	0.06	0.04	0.211	0.312	2.25	69.16	8
14	Zambia	0.01	0.04	0.030	0.299	2.16	71.32	20
15	Malawi	0.02	0.03	0.076	0.208	1.50	72.82	15
16	New Zealand	0.01	0.03	0.045	0.198	1.43	74.25	19
17	Belgium	0.03	0.02	0.116	0.151	1.09	75.34	13
18	Cote D'Ivoire	0.02	0.01	0.066	0.099	0.72	76.06	16
19	Singapore	0.01	0.01	0.049	0.087	0.63	76.69	18
20	Mozambique	0.01	0.01	0.050	0.075	0.54	77.23	17

Source: National Department of Agriculture: NDA (2004)

4. TOP TRADED AGRICULTURAL PRODUCTS

4.1 Methodology

Trademaps available from www.tips.org.za were used to determine growth in agricultural imports from a world perspective, as well as growth in South African exports. These trends were obtained on an HS2, HS4 and HS6 level. The trends displayed in this section are on an HS4 digit basis, while the HS6 digit trends can be seen in Annexure B. The growth trends were ranked according to the long-term growth rate (2000 to 2004) for the various products. Only the top 10 products were identified.

These products were then compared on a world import/South African export basis in table format. From these tables some opportunities in trade were identified.

4.2 Growth in the value of imports of primary agricultural products in the world (top 10)

Table 10 shows the growth in the value of primary agricultural imports in the world for the period 2000 to 2004. Only the top 10 highest growth rates are reported on an HS4 digit code level. Table 10 also shows the annual growth in value of South African exports of the same products over the same period.

For all the products listed in Table 10, with the exception of manioc, arrowroot salem (yams), etc. and oil seeds, annual growth of South African exports grew at a faster rate than those of world imports.

For comparison purposes Table 10 also shows the annual growth rates for the 2003-2004 period for the same products. It is clear that in several instances South Africa has not been able to match import growth in the world market, e.g. oilseeds, maize, and fruits n.e.s., fresh.

Table 10: World top 10 primary agricultural product imports and South African exports ranked according to growth in value (2000-2004)

Rank	HS4		Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %
			World Imports	SA Exports	World Imports	SA Exports
1	0602	Plants, live, n.e.s. (incl. their roots), cuttings & slips; mushroom spawn	15	21	10	31
2	0810	Fruits n.e.s., fresh	15	34	21	-32
3	0802	Nuts n.e.s.	14	23	27	7
4	0701	Potatoes	13	25	16	-2
5	0808	Apples, pears and quinces, fresh	13	29	13	37
6	0714	Manioc, arrowroot salem (yams), etc.	12	-4	54	-76
7	0709	Vegetables n.e.s., fresh or chilled	12	14	13	1
8	1207	Oil seeds	11	-9	30	-84
9	0103	Live swine	10	43	27	-89
10	1005	Maize (corn)	10	15	15	-18

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 11 shows the growth in the value of primary agricultural imports in the world for the period 2003 to 2004. Only the top 10 highest growth rates are reported on an HS4 digit code level. Table 11 also shows South Africa's position in terms of the growth in the value of exports of these specific products.

For rape or colza seeds, broken or not (375%) and cotton, not carded or combed (77%), growth in the value of exports by South Africa exceeded the growth in the value of imports in the world. The only other product with a positive growth in the value of exports for the period 2003 to 2004 was nuts n.e.s. (7%). For all other products, South Africa experienced negative growth for the period 2003 to 2004. Table 11 also shows that South Africa's export position for these products was more favourable over the longer run.

Table 11: World top 10 primary agricultural product imports and South African exports ranked according to growth in value (2003-2004)

Rank	HS4		Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %
			World Imports	SA Exports	World Imports	SA Exports
1	1203	Copra	141	No trade	-18	No trade
2	0714	Manioc, arrowroot salem (yams), etc.	54	-76	12	-4
3	1205	Rape or colza seeds, broken or not	39	375	4	85
4	5201	Cotton, not carded or combed	38	77	8	18
5	1002	Rye	38	No trade	5	No trade
6	1207	Oil seeds	30	-84	11	-9
7	1001	Wheat and meslin	29	0	8	-14
8	5305	Coconut, abaca, ramie & other vegetable fibres, raw, processed, not spun	29	0	4	47
9	0802	Nuts n.e.s.	27	7	14	23
10	0103	Live swine	27	-89	10	43

Source: Trade and Industrial Policy Strategies: www.tips.org.za

4.3 Growth in the value of exports of primary agricultural products by South Africa (Top 10)

Table 12 shows the growth in value of primary agricultural exports by South Africa for the period 2000 to 2004. Only the top 10 highest growth rates are reported on an HS4 digit code level. Table 12 also compares growth in the value of imports in the world for the same products over the same period.

The growth in the value of exports for the products shown was in all cases higher than the growth in the value of imports of the same products in the world for the period 2000 to 2004.

South African exports for rape or colza seeds, broken or not, and locust beans showed significant growth over the short term (2003-2004).

Table 12: South African top 10 primary agricultural product exports and world imports ranked according to growth in value (2000-2004)

Rank	HS4		Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %
			SA Exports	World Imports	SA Exports	World Imports
1	1210	Hop cones, fresh or dried	102	4	1	21
2	1205	Rape or colza seeds, broken or not	85	4	375	39
3	0905	Vanilla	82	40	47	-26
4	1212	Locust beans	80	8	226	17
5	0409	Natural honey	67	25	12	-8
6	0703	Onions, garlic and leeks, fresh or chilled	49	13	15	11
7	0104	Live sheep and goats	46	15	36	3
8	0706	Carrots, turnips and salad beetroot, fresh or chilled	45	10	11	3
9	0101	Live horses, asses, mules and hinnies	43	0	-41	10
10	0103	Live swine	43	10	-89	27
10	1007	Grain sorghum	43	1	-46	8

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 13 shows the growth in value of agricultural product exports by South Africa for the period 2003 to 2004. Only the top 10 highest growth rates are reported on an HS4 digit code level. Table 13 also indicates the ranking of world imports with respect to these exports.

The export of all these products by South Africa has grown quite extensively. The following products grew in value at extremely high rates (over 100%) over the period 2003-2004: Rape or colza seeds, broken or not (375%); locust beans (226%); and bananas & plantains, fresh or dried (134%).

In comparing the growth rates of South Africa's exported products to those of world imports for the same period, the following can be said: With the exception of vanilla, which grew negatively at -26%, all other products traded grew at a positive rate, with live sheep & goats showing the slowest growth rate of 3%.

Table 13: South African top 10 primary agricultural product exports and world imports ranked according to growth in value (2003-2004)

Rank	HS4		Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %
			SA Exports	World Imports	SA Exports	World Imports
1	1205	Rape or colza seeds, broken or not	375	38	85	8
2	1212	Locust beans	226	16	80	13
3	0803	Bananas and plantains, fresh or dried	134	11	-33	8
4	5201	Cotton, not carded or combed	77	38	18	5
5	0901	Coffee	53	16	-9	-1
6	0801	Brazil nuts, cashew nuts & coconuts	48	27	24	1
7	0905	Vanilla	47	-26	82	40
8	0806	Grapes, fresh or dried	46	11	16	9
9	0808	Apples, pears and quinces, fresh	37	13	29	12
10	0104	Live sheep and goats	36	3	46	15

Source: Trade and Industrial Policy Strategies: www.tips.org.za

4.4. Growth in the value of imports of processed agricultural products in the world (top 10)

Table 14 shows the growth in the value of processed agricultural imports in the world for the period 2000 to 2004. Only the top 10 highest growth rates are reported on an HS4 digit code level. Table 14 indicates the ranking of South Africa's exports with respect to world imports of the same products.

From Table 14 it is evident that South Africa did not export animal fats & oils or their fractions for the period 2000 to 2004. Although birds' eggs (dried) are amongst the top ten agricultural food products imported by the world, the value of exports of this product experienced negative growth for South Africa.

With the exception of food preparations n.e.s. (9%) the growth rate for South Africa's other exported products reached double digits, and some [olive oil & its fractions (29% vs. 20%), buttermilk & yoghurt (34% vs. 18%)] have even been growing faster than the world's top 10 imported agricultural food products.

Table 14: World top 10 processed agricultural product imports and South African exports ranked according to growth in value (2000-2004)

Rank	HS4		Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %
			World Imports	SA Exports	World Imports	SA Exports
1	0209	Pig and poultry fat	24	12	62	-59
2	1509	Olive oil and its fractions	20	29	36	-9
3	1506	Animal fats & oils and their fractions	19	No trade	78	
4	0408	Birds' eggs, dried	19	-13	18	-27
5	0403	Buttermilk and yoghurt	18	34	19	25
6	2202	Non-alcoholic beverages (excl. water, fruit or vegetable juices and milk)	18	17	19	-26
7	1905	Bread, biscuits, wafers, cakes and pastries	15	14	17	-1
8	1904	Breakfast cereals and cereal bars	15	25	17	-8
9	2106	Food preparations, n.e.s.	15	9	19	0
10	2105	Ice-cream	15	17	11	35

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 15 shows the growth in the value of processed agricultural imports in the world for the period 2003 to 2004. Only the top 10 highest growth rates are reported on an HS4 digit code level. Table 15 also indicates the ranking of South Africa's processed agricultural exports with respect to those of world imports.

South Africa did not export ground-nut oil-cake & other solid residues (which grew at 135%) or animal fats & oils & their fractions (which grew at 78%). Both these products grew aggressively in world imports over the period 2003-2004.

Exports by South Africa for the following agricultural food products showed negative growth in comparison to the double-digit growth in world imports: Pig & poultry fat (-59% vs. 62%); flour & meals of oil seeds (-79% vs. 40%); and olive oil & its fractions (-9% vs. 36%).

South Africa's exports for the following products grew faster in value terms over the period 2003-2004 than world imports of the same products: Other oils from olives (131% vs. 39%); oil-cake n.e.s. (86% vs. 37%); rape, colza or mustard oil & their fractions (115% vs. 34%); and ginger, saffron, turmeric, thyme, bay leaves & curry (54% vs. 33%).

Table 15: World top 10 processed agricultural product imports and South African exports ranked according to growth in value (2003-2004)

Rank	HS4	World Imports	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %
			World Imports	SA Exports	World Imports	SA Exports
1	2305	Ground-nut oil-cake and other solid residues	135	No trade	-3	No trade
2	1506	Animal fats & oils and their fractions	78	No trade	19	No trade
3	0209	Pig and poultry fat	62	-59	24	12
4	1208	Flour and meals of oil seeds	40	-79	8	6
5	1510	Other oils from olives	39	131	13	-25
6	2306	Oil-cake n.e.s.	37	86	10	72
7	1509	Olive oil and its fractions	36	-9	20	29
8	1514	Rape, colza or mustard oil and their fractions	34	115	12	24
9	1513	Coconut (copra), palm kernel/babassu oil and their fractions	33	27	13	32
10	0910	Ginger, saffron, turmeric, thyme, bay leaves and curry	33	54	13	11

Source: Trade and Industrial Policy Strategies: www.tips.org.za

4.5 Growth in the value of exports of processed agricultural products by South Africa (top 10)

Table 16 shows the growth in the value of processed agricultural exports by South Africa for the period 2000 to 2004. Only the top 10 highest growth rates are reported on an HS4 digit code level. Table 16 also indicates the world ranking of processed agricultural imports with respect to those of South Africa's exports.

The lowest growth rate for these top 10 agricultural food products exported by South Africa is 58% (swede, mangold, fodder root, hay, lucerne (alfalfa), clover, etc.). Sustained high growth rates were achieved in excess of 58% over the four-year period from 2000-2004. Comparing these growth rates to those of world imports, it can be clearly seen that South Africa's exports for these specific products are much higher. All of South Africa's top 10 agricultural food exports, shown in this table, grew faster over this period than those of world imports.

Table 16: South African top 10 processed agricultural product exports and world imports ranked by growth in value (2000-2004)

Rank	HS4	SA Exports	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %
			SA Exports	World Imports	SA Exports	World Imports
1	0510	Bile and other animal glands for pharmaceutical preparation	79	13	86	39
2	2303	Beet-pulp, bagasse and brewing or distilling dregs and waste	72	9	-90	18
3	2306	Oil-cake n.e.s.	72	10	86	37
4	1804	Cocoa butter, fat and oil	68	18	149	8
5	2001	Cucumbers, gherkins and onions preserved by vinegar	68	14	40	14
6	2301	Flour, etc. of meat, meat offal, fish, crust, etc. unfit for human consumption	68	3	-34	12
7	1803	Cocoa paste, defatted or not	65	26	-27	-9
8	2205	Vermouth and other grape wine flavoured with plants or aromatic substances	63	10	-33	12
9	0204	Meat of sheep or goats, fresh, chilled or frozen	60	13	-43	17
10	1214	Swede, mangold, fodder root, hay, lucerne (alfalfa), clover, etc.	58	6	-41	-1

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 17 shows the growth in the value of processed agricultural exports by South Africa for the period 2003 to 2004. Only the top 10 highest growth rates are reported on an HS4 digit code level. Table 17 also indicates the ranking of world imports of processed agricultural products with respect to South African exports of these for the same period.

South Africa achieved exceptionally high growth rates in agricultural food exports over the period 2003-2004 for the products tabled below. Eight out of the ten products grew at a rate of over 100%, while the remaining two products came close at 96% and 91% respectively. World imports of the same products also grew, but at much slower rates than South Africa's exports.

Table 17: South African top 10 processed agricultural product exports and world imports ranked by growth in value (2003-2004)

Rank	HS4		Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %
			SA Exports	World Imports	SA Exports	World Imports
1	0404	Whey % natural milk products n.e.s.	351	26	30	13
2	1602	Prepared or preserved meat, meat offal or blood n.e.s.	207	19	19	4
3	1804	Cocoa butter, fat and oil	149	8	68	18
4	2201	Mineral and aerated waters	133	10	3	13
5	1510	Other oils from olives	131	37	-25	10
6	1514	Rape, colza or mustard oil and their fractions	115	33	24	13
7	0511	Animal products n.e.s.	114	10	18	4
8	1107	Malt, roasted or not	105	16	18	3
9	0201	Meat of bovine animals, fresh or chilled	96	12	21	8
10	1518	Animal or vegetable fats and oils chemically modified; inedible mixtures	91	29	-29	19

Source: Trade and Industrial Policy Strategies: www.tips.org.za

The same analysis as was presented in this section was done on the HS6 digit code level. The tables appear in Appendix B.

5. CONCLUSION

5.1 Trade performance

The Trade Performance Index was used to investigate current trade flows for South Africa.

5.1.1 Trade Performance Index

In terms of trade performance in 2003, of the 13 main sectors in South Africa, the fresh food sector showed the best performance if only agricultural products are taken into consideration. The fresh food sector increased its exports by 6 percent per annum from 1999 to 2003 and contributed 6 percent to total national exports with a world market share of 0.68 percent in 2003. Processed foods showed an increase in per capita annual exports of 7 percent from 1999 to 2003 and contributed 5 percent to the total national exports in 2003, securing 0.51 percent of the world market share. The processed food sector showed a decline in world market share of 2.44 percent per annum from 1999 to 2003, mainly due to the annual decline in the competitiveness effect of 0.26 percent.

Tables 2.1 to 2.5 show the Product Performance Indicators (PPI) for various agricultural commodities. When looking at the annual growth in per capita exports from 1999 to 2003, the following products performed best: animal feed (68.4%), live animals (31.7%), medicinal plants (25.1%), leather products (12.2%), nuts (11.2%), beverages (9.9%) and fruit & vegetables (9.2%). In terms of value traded, fruit & vegetables contributed the largest share (959 233 million USD). In terms of share in world markets in 2003, medicinal plants performed best with 1.6 percent, followed by fruit & vegetables, fruit & vegetable juices and beverages with 1.5, 1.4, and 1.3 percent respectively.

Figure 1 plots the ranking of international competitiveness in terms of static indicators (Current Index, 2003) and dynamic indicators (Change Index, 1999 to 2003). Position one in the ranking refers to the best performance out of 189 countries. From Figure 1 it is clear that fruit & vegetable juices (ranked 3rd) have the highest ranking in South Africa, followed by fruit & vegetables (ranked 7th) and cut flowers & ornamental plants (ranked 9th).

5.1.2 Trade Flows

Total South African exports of all products increased from 90 234 million Rand in 1994 to 269 284 million Rand in 2004. Total imports increased from 76 823 million Rand to 306 927 million Rand over the same period. The average share in agricultural exports over the period 1994 to 2004 was 4.6 percent of total exports, while the average share in agricultural imports was 2 percent of total

imports. The mining and manufacturing sectors contributed on average 39 percent and 56 percent respectively to total exports, while these sectors contributed 12 percent and 85 percent respectively to total imports between 1994 and 2003. Noteworthy is that the value of exports by all sectors dropped during 2003, but rebounded again in 2004.

The major export destinations for all products exported by South Africa are the European Union, North-East Asia, NAFTA and the SADC. These regions account for 70.4 percent of total exports. The ranking of export destinations in terms of value did not change meaningfully between 2004 and 2005. Noteworthy is that the following regions recorded a growth of more than 50 percent from 2004 to 2005 in terms of the value of goods exported to them: South Middle Asia, North Africa, SAARC and CARICOM.

The major export destinations for agricultural products exported by South Africa according to export value in 2003 are the United Kingdom, Netherlands, Mozambique, Germany and Zimbabwe. These regions account for 40 percent of total agricultural exports. The only significant change in rankings was Zimbabwe, which moved from 14th place in 2000 to 5th place in 2003. The top ten destinations for South African agricultural exports account for nearly 60 percent of exports.

The top agricultural exports according to annual growth in value between 2000 and 2004 were hop cones (fresh or dried), rape or colza seeds (broken or not), vanilla, locust beans, and natural honey. All these products had an annual growth rate of more than 50 percent for the specified period. The top destinations, as well as the export barriers to these countries, are summarised in Table 13A in the annexure.

The top agricultural exports according to export value in 2005 were wine of fresh grapes (including fortified wines), citrus fruit (fresh or dried), grapes (fresh or dried), cane or beet sugar & chemically pure sucrose in solid form, as well as maize. The only significant change in the ranking of the top 5 products was maize, which moved from 52nd to 29th place, growing by 129 percent from 2004 to 2005. Other products showing significant growth in the same period included cereal grouts, meal & pellets (2076%) and other nuts, fresh or dried, shelled or peeled or not (108%).

5.1.3 Trademaps

Table 18 shows the fastest growing world imports according to annual growth in value between 2000 and 2004. It is clear from Table 18 that vanilla, cocoa paste (defatted or not), natural honey, pig & poultry fat, and olive oil & its fractions are some of the fastest growing imported products in the world (growing by more than 20% annually in value during the period 2000 to 2004). The results from Table 18 are summarised in Table 19.

Table 18: Fastest growing agricultural and food products imported by the world ranked according to annual growth in value between 2000 and 2004 (%)

Rank	HS4	Product	World Imports	SA Exports
1	0905	Vanilla	40	82
2	1803	Cocoa paste, defatted or not	26	65
3	0409	Natural honey	25	67
4	0209	Pig and poultry fat	24	12
5	1509	Olive oil and its fractions	20	29
6	0403	Buttermilk and yoghurt	18	34
7	2202	Non-alcoholic beverages (excl. water, fruit or vegetable juices and milk)	18	17
8	1804	Cocoa butter, fat and oil	18	68
9	0602	Plants, live, n.e.s. (incl. their roots), cuttings & slips; mushroom spawn	15	21
10	0810	Fruits n.e.s., fresh	15	34
11	0104	Live sheep and goats	15	46
12	1905	Bread, biscuits, wafers, cakes and pastries	15	14
13	1904	Breakfast cereals and cereal bars	15	25
14	2105	Ice-cream	15	17
15	0802	Nuts n.e.s.	14	23
16	2001	Cucumbers, gherkins and onions preserved by vinegar	14	68
17	0701	Potatoes	13	25
18	0808	Apples, pears and quinces, fresh	13	29
19	0510	Bile and other animal glands for pharmaceutical preparation	13	79
20	0204	Meat of sheep or goats, fresh, chilled or frozen	13	60
21	0709	Vegetables n.e.s., fresh or chilled	12	14
22	0103	Live swine	10	43
23	1005	Maize (corn)	10	15
24	2306	Oil-cake n.e.s.	10	72
25	2205	Vermouth and other grape wine flavoured with plants or aromatic substances	10	63

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 19: World imports versus South African exports for various agricultural commodities (HS4) according to their annual growth in value between 2000 and 2004

World imports	South African exports
>40%	
<ul style="list-style-type: none"> • Vanilla 	<ul style="list-style-type: none"> • Vanilla • Bile and other animal glands of pharmaceutical preparation • Oil-cake n.e.s. • Cocoa butter, fat and oil • Cucumbers, gherkins and onions preserved by vinegar • Natural honey • Cocoa paste, defatted or not • Vermouth and other grape wine flavoured with plants or aromatic substances • Meat of sheep or goats, fresh, chilled or frozen • Live sheep and goats • Live swine
20%-30%	
<ul style="list-style-type: none"> • Cocoa paste, defatted or not • Natural honey • Pig and poultry fat • Olive oil and its fractions 	<ul style="list-style-type: none"> • Buttermilk and yoghurt • Fruit n.e.s., fresh • Olive oil and its fractions • Apples, pears and quinces, fresh • Breakfast cereals and cereal bars • Potatoes • Nuts n.e.s. • Plants, live, n.e.s. (incl. their roots), cuttings & slips; mushroom spawn
15%-20%	
<ul style="list-style-type: none"> • Buttermilk and yoghurt • Non-alcoholic beverages (excl. water, fruit & vegetable juices and milk) • Cocoa butter, fat and oil • Plants, live, n.e.s. (incl. their roots), cuttings & slips; mushroom spawn • Fruits n.e.s., fresh • Live sheep and goats • Bread, biscuits, wafers, cakes and pastries • Breakfast cereals and cereal bars • Ice-cream 	<ul style="list-style-type: none"> • Non-alcoholic beverages (excl. water, fruit & vegetable juices and milk) • Ice-cream

10%-15%	
<ul style="list-style-type: none"> • Nuts n.e.s. • Cucumbers, gherkins and onions preserved by vinegar • Potatoes • Apples, pears and quinces, fresh • Bile and other animal glands for pharmaceutical preparation • Meat of sheep or goats, fresh, chilled or frozen • Vegetables n.e.s., fresh or chilled • Live swine • Maize • Oil-cake n.e.s. • Vermouth and other grape wine flavoured with plants or aromatic substances 	<ul style="list-style-type: none"> • Maize • Bread, biscuits, wafers, cakes and pastries • Vegetables n.e.s., fresh or chilled • Pig and poultry fat

5.1.4 National Export Performance

The national export performance tool provides an overview of the export performance of a country in terms of the composition of products and their exports, the dynamics of the international demand for the export products, and growth trends for their leading export products.

Figure 2 shows the growth of national supply and international demand for the top 28 agricultural export products of South Africa in 2004 in terms of export value of the products (the larger the bubble, the greater the value), and compares the annual growth of exports of South Africa between 2000 and 2004 on percentage terms (on the horizontal axis) to the annual growth of world imports over the same period (vertical axis). The total growth of South African exports for the period 2000 to 2004 can be seen on the vertical reference line (just above 10 percent per annum). The vertical line (indicating constant world market shares) divides the figure into two parts. Exported products to the right of the line have grown faster than world imports and thereby increased their share in the world market. Exports of products to the left of the line have seen erosion of their world market share. Figure 2 also provides an overview of the concentration of exports. The appearance of one or a few comparatively large circles shows that exports are highly concentrated.

The horizontal and vertical lines in Figure 2 divide the figure into four quadrants with different characteristics. These characteristics can be defined as follows:

Champions – winners in growing markets: These are the export products of South Africa that performed extremely well, including citrus fruit (fresh or dried);

wine of fresh grapes; beer made from malt; apples, pears & quinces (fresh); nuts n.e.s.; preserved fruits n.e.s.; and maize. These products are the only agricultural commodities in the quadrant and the only dynamic commodities growing faster than world trade in general and for which South Africa has outperformed world market growth and increased its share in world imports. Trade promotion for these products is less risky, and promotional efforts should aim at broadening the supply capacity.

Underachievers – losers in growing markets: These products represent particular challenges for trade promotion efforts in South Africa. While international demand for these products has been growing at above-average rates, South Africa has been falling behind. South African exports have either declined or grown less dynamically than world trade. This means that South Africa has been losing international market share. Generally, the cause is not international demand but rather a problem on the supply side. For these products, it is important to identify and remove constraints that obstruct a more dynamic expansion of exports. Agricultural products falling into this category include dates, figs, pineapples, mangoes, avocados & guavas; food preparations n.e.s.; chocolate & other preparations containing cocoa; spirit liqueurs, other spirit beverages & alcoholic preparations; and pig iron & spiegeleisen in pigs.

Achievers in adversity – winners in declining markets: Products in this category are characterised by growing shares of South African exporters in world import markets, which are declining or growing at a below-average rate. From a trade promotion perspective, niche marketing strategies are required to encourage positive trade performance despite the overall decline in these markets. Products in this category include grapes (fresh or dried); vegetable tanning extracts, tannins & their salts; wool (not carded or combed); locust beans; and raw hides & skins of bovine/equine animals.

Losers in declining markets: The export prospects for products in this category are questionable. World imports for products in this category have been stagnating or have declined, and the market share of South Africa has gone down. Products in this category include cane or beet sugar & chemically pure sucrose in solid form; cut flowers & flower buds for bouquets (fresh or dried); fruit & vegetable juices (unfermented); meat & edible offal n.e.s.; wool & fine or coarse animal hair (carded or combed); and tobacco (unmanufactured) & tobacco refuse. Trade promotion efforts for products in this category face difficulty.

Table 20: South African exports ranked according to value in '000 USD in 2004

HS4	Product	Value 2004 in US\$ thousand
	All products	40,206,116
2204	Wine of fresh grapes	534,646
0805	Citrus fruit, fresh or dried	453,236
0806	Grapes, fresh or dried	316,678
0808	Apples, pears and quinces, fresh	261,311
1701	Cane or beet sugar and chemically pure sucrose, in solid form	221,461
2008	Preserved fruits n.e.s.	190,157
1005	Maize (corn)	112,949
7201	Pig iron and spiegeleisen in pigs	102,748
2009	Fruit & vegetable juices, unfermented	95,446
5101	Wool, not carded or combed	89,769
5105	Wool and fine or coarse animal hair, carded or combed	84,457
4102	Raw skins of sheep or lambs	58,277
2202	Non-alcoholic beverages (excl. water, fruit & vegetable juices and milk)	56,229
0809	Apricots, cherries, peaches, nectarines, plums and sloes, fresh	52,820
4104	Leather of bovine/equine animals, other than leather of hd 41.08/41.09	48,388
4107	Leather of other animals, other than leather of hd 41.08/41.09	42,533
2401	Tobacco, unmanufactured, and tobacco refuse	41,869
2203	Beer made from malt	37,887
2106	Food preparations n.e.s.	36,432
0804	Dates, figs, pineapples, mangoes, avocados, guavas	34,526
2208	Spirits, liqueurs, other spirit beverages and alcoholic preparations	31,878
0802	Nuts n.e.s.	31,248
4101	Raw hides & skins of bovine/equine animals	27,825
0208	Meat and edible meat offal n.e.s.	27,821
3201	Vegetable tanning extracts; tannins and their salts	27,731
1212	Locust beans	24,881
0603	Cut flowers and flower buds for bouquets, fresh or dried	21,624
1806	Chocolate and other food preparations containing cocoa	20,697

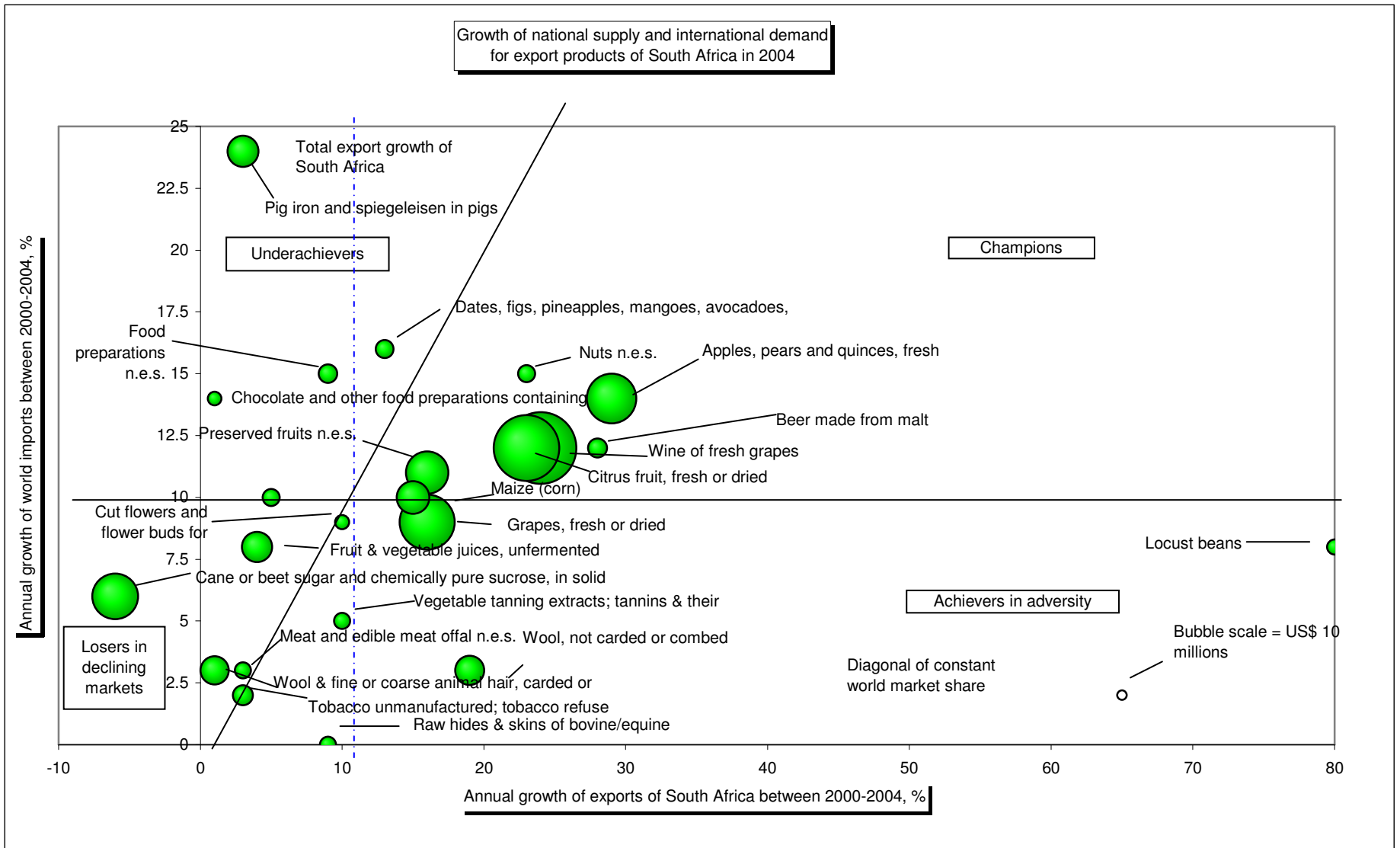


Figure 2: Export portfolio for South Africa

References

USDA (2004) *Seizing the opportunities from trade*. Available from: <http://www.fas.usda.gov/itp/TEI/tei.htm> (Accessed 20 February 2006).

Annexure A

Table 1A: TPI for South Africa

Indicators		South Africa	Chemicals		Basic manufactures		Non-electronic machinery		IT&Consumer electronics		
			Value	Rank (127)**	Value	Rank (130)**	Value	Rank (107)**	Value	Rank (77)**	
General Profile	G1	Value of exports (\$ 000)	2,645,914		9,026,685		2,384,788		395,756		
	G2	Trend of exports (99 - 03) p.a.	13%	65	7%	86	15%	53	8.00%	48	
	G3	Share in national exports	8%		29%		8%		1.00%		
	G4	Share in national imports	13%		6%		15%		11.00%		
	G5	Average annual change in per capita exports	6%	60	28%	9	15%	26	1.00%	46	
	G6	Relative unit value (world average = 1)									
	G7	Average annual change in relative unit value									
Position in 2003 (Current Index)	P1	Value of net exports (\$ 000)	1,543,366	98	7,150,600	5	-2,394,406	89	-2,941,242	66	
	P2	Per capita exports (\$/inhabitant)	59	63	200.6	36	53	44	8.8	61	
	P3	Share in world market	0.32%	34	1.69%	17	0.34%	30	0.06%	43	
	P4a	Product diversification (N° of equivalent products)	68	4	15	52	4	101	15	1	
	P4b	Product spread (concentration)		5		39		74		2	
	P5a	Market diversification (N° of equivalent markets)	20	5	12	23	13	17	19	3	
	P5b	Market spread (concentration)		7		16		19		8	
Change 1999-2003 (Change Index)	C1	Relative change in world market share (% p.a.)	-4.33%		1.74%		1.96%		-3.75%		
		Sources	Competitiveness effect p.a.	0.65%	62	1.76%	46	3.46%	30	-3.23%	56
			Initial geographic specialisation p.a.	-0.79%	89	-0.18%	83	0.62%	67	2.32%	24
			Initial product specialisation p.a.	-2.00%	87	3.31%	23	1.28%	47	1.97%	22
			Adaptation p.a.	-2.19%	98	-3.15%	109	-3.41%	81	-4.80%	57
	C2	Trend of import coverage by exports	1%	53	10%	17	5.00%	35	-2.00%	47	
	C3	Matching with dynamics of world demand		107		50		24		75	
	C4a	Change in product diversification (N° of equiv. products)		21		33		76		4	
	C4b	Change in product spread (concentration)		21		33		75		4	
	C5a	Change in market diversification (N° of equiv. markets)		21		116		74		41	
C5b	Change in market spread (concentration)		24		116		74		45		
Indicators included in chart	A	Absolute change of world market share (% points p.a.)	-0.0002%	79	0.2159%	3	0.0286%	16	0.0005%	39	
	P	Current Index		25		11		47		30	
	C	Change Index		50		51		47		51	

Table 1A continued: TPI for South Africa

Indicators		South Africa	Electronic components		Transport equipment		Clothing		Miscellaneous manufacturing		
			Value	Rank (99)**	Value	Rank (97)**	Value	Rank (117)**	Value	Rank (124)**	
General Profile	G1	Value of exports (\$ 000)	456,809		3,288,279		304,784		1,173,200		
	G2	Trend of exports (99 - 03) p.a.	11%	54	14%	52	9%	65	9.00%	87	
	G3	Share in national exports	1%		10%		1%		4.00%		
	G4	Share in national imports	5%		13%		1%		7.00%		
	G5	Average annual change in per capita exports	9%	37	18%	31	5%	52	9.00%	47	
	G6	Relative unit value (world average = 1)									
	G7	Average annual change in relative unit value									
Position in 2003 (Current Index)	P1	Value of net exports (\$ 000)	1,082,271	80	-638,514	60	-37,491	92	-971,511	110	
	P2	Per capita exports (\$/inhabitant)	10.2	64	73.1	46	6.8	96	26.1	66	
	P3	Share in world market	0.07%	49	0.37%	28	0.13%	60	0.19%	43	
	P4a	Product diversification (N° of equivalent products)	29	18	4	74	19	50	8	79	
	P4b	Product spread (concentration)		18		54		52		52	
	P5a	Market diversification (N° of equivalent markets)	15	10	7	26	3	68	8	33	
	P5b	Market spread (concentration)		15		25		35		25	
Change 1999-2003 (Change Index)	C1	Relative change in world market share (% p.a.)	3.23%		3.10%		-1.41%		2.37%		
		Sources	Competitiveness effect p.a.	-0.06%	64	4.15%	30	1.17%	52	-0.97%	84
			Initial geographic specialisation p.a.	2.62%	44	0.53%	72	-0.95%	72	0.81%	57
			Initial product specialisation p.a.	6.57%	7	1.02%	49	0.14%	57	6.11%	11
		Adaptation p.a.	-5.90%	84	-2.61%	71	-1.77%	85	-3.59%	111	
	C2	Trend of import coverage by exports	6%	29	-4%	66	-2%	63	6%	38	
	C3	Matching with dynamics of world demand		3		39		69		26	
	C4a	Change in product diversification (N° of equiv. products)		47		89		62		19	
	C4b	Change in product spread (concentration)		52		85		65		19	
C5a	Change in market diversification (N° of equiv. markets)		16		86		21		13		
C5b	Change in market spread (concentration)		20		86		21		16		
Indicators included in chart	A	Absolute change of world market share (% points p.a.)	0.0053%	35	0.0325%	14	0.0024%	41	0.0099%	30	
	P	Current Index		40		40		76		54	
	C	Change Index		6		90		55		12	

Table 1A continued: TPI for South Africa

Indicators		South Africa	Minerals		
			Value	Rank (151)**	
General Profile	G1	Value of exports (\$ 000)	6,464,437		
	G2	Trend of exports (99 - 03) p.a.	6%	62	
	G3	Share in national exports	21%		
	G4	Share in national imports	17%		
	G5	Average annual change in per capita exports	6%	56	
	G6	Relative unit value (world average = 1)			
	G7	Average annual change in relative unit value			
Position in 2003 (Current Index)	P1	Value of net exports (\$ 000)	1,136,480	37	
	P2	Per capita exports (\$/inhabitant)	143.7	63	
	P3	Share in world market	0.83%	32	
	P4a	Product diversification (N° of equivalent products)	6	10	
	P4b	Product spread (concentration)		4	
	P5a	Market diversification (N° of equivalent markets)	15	4	
	P5b	Market spread (concentration)		5	
Change 1999-2003 (Change Index)	C1	Relative change in world market share (% p.a.)	-2.58%		
		Sources	Competitiveness effect p.a.	-2.60%	114
			Initial geographic specialisation p.a.	-1.71%	142
			Initial product specialisation p.a.	1.95%	53
			Adaptation p.a.	-0.22%	54
	C2	Trend of import coverage by exports	-23%	132	
	C3	Matching with dynamics of world demand		93	
	C4a	Change in product diversification (N° of equiv. products)		41	
	C4b	Change in product spread (concentration)		43	
	C5a	Change in market diversification (N° of equiv. markets)		31	
C5b	Change in market spread (concentration)		36		
Indicators included in chart	A	Absolute change of world market share (% points p.a.)	0.0441%	18	
	P	Current Index		6	
	C	Change Index		78	

Annexure B

Table 1B: World top 10 HS6 agricultural product imports ranked by growth in value between 2000 and 2004

Rank	HS6		Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %
			World imports	SA Exports	World imports	SA Exports
1	060120	Bulbs, tubers, corms, etc. in growth or in flower and chicory plants & roots	27	42	27	4
2	120710	Palm nuts and kernels, broken or not	23	No trade	86	No trade
3	110814	Manioc (cassava) starch	22	8	27	0
4	080290	Nuts, edible, fresh or dried, shelled or peeled or not, n.e.s.	21	23	42	7
5	081040	Cranberries, bilberries and other fruits of the genus Vaccinium, fresh	21	162	40	68
6	071420	Sweet potatoes, fresh or dried, sliced or pelleted or not	21	-4	36	-77
7	080122	Brazil nuts, without shell, fresh or dried	18	No trade	78	No trade
8	071410	Manioc (cassava), fresh or dried, sliced or pelleted or not	16	No trade	75	No trade
9	091040	Thyme and bay leaves	16	12	32	17
10	060290	Plants, live, n.e.s.	15	21	11	37

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 2B: World top 10 HS6 agricultural product imports ranked by growth in value between 2003 and 2004

Rank	HS6		Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %
			World imports	SA Exports	World imports	SA Exports
1	091010	Ginger	90	-62	13	-4
2	120710	Palm nuts & kernels, broken or not	86	No trade	23	No trade
3	080122	Brazil nuts, without shell, fresh or dried	78	No trade	18	No trade
4	71410	Manioc (cassava), fresh or dried, sliced/pelleted or not	75	No trade	16	No trade
5	010599	Poultry, live, except domestic fowl, weighing more than 185 g	74	-88	5	-27
6	230670	Maize/corn germ oil-cake and solid residues	64	No trade	9	No trade
7	510510	Carded wool	63	423	-4	-5
9	100110	Durum wheat	48	No trade	9	No trade
10	071332	Beans, small red (Adzuki), dried, shelled, whether skinned/split or not	47	179	10	0
11	080131	Cashew nuts, in shell, fresh or dried	46	No trade	-1	No trade

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 3B: South Africa, top 10 HS6 agricultural product exports ranked by growth in value between 2003 and 2004

Rank	HS6		Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %
			SA Exports	World imports	SA Exports	World imports
1	070890	Leguminous vegetables, shelled or unshelled, fresh or chilled, n.e.s.	723	9	-7	2
2	080410	Dates, fresh or dried	602	10	55	12
3	510510	Carded wool	423	63	-5	-4
4	090820	Mace	380	7	0	1
5	090111	Coffee, not roasted, not decaffeinated	380	15	-34	-4
6	120500	Rape or colza seeds, broken or not	375	39	85	4
7	081010	Strawberries, fresh	277	20	-19	13
8	060410	Mosses and lichens suitable for bouquets or for ornamental purposes	233	1	-2	8
9	080132	Cashew nuts, without shell, fresh or dried	224	31	46	8
10	071350	Broad beans and horse beans, dried, shelled, whether skinned/split or not	200	19	41	7

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 4B: South African top 10 HS 6 agricultural product exports ranked by growth in value between 2000 and 2004

Rank	HS6		Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %
			SA Exports	World imports	SA Exports	World imports
1	010392	Swine, live, except pure-bred animals weighing 50 kg or more	167	10	110	34
2	081040	Cranberries, bilberries and other fruits of the genus Vaccinium, fresh	162	21	68	40
3	081020	Raspberries, blackberries, mulberries and loganberries, fresh	139	28	3	15
4	081050	Kiwifruit, fresh	133	16	-65	21
5	010593	Live fowl (gallus domesticus) >2 kg	123	7	0	34
6	090190	Coffee husks & skins, coffee substitutes	113	6	66	28
7	100820	Millet	92	10	-38	4
8	120500	Rape or colza seeds, broken or not	85	4	375	39
9	010410	Sheep (live)	83	16	83	3
10	090500	Vanilla beans	82	40	47	-26

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 5B: South African top 10 HS6 agricultural product exports ranked by growth in value between 2003 and 2004

Rank	HS6		Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %
			SA Exports	World imports	SA Exports	World imports
1	070890	Leguminous vegetables, shelled or unshelled, fresh or chilled, n.e.s.	723	9	-7	2
2	080410	Dates, fresh or dried	602	10	55	12
3	510510	Carded wool	423	63	-5	-4
4	090820	Mace	380	7	0	1
5	090111	Coffee, not roasted, not decaffeinated	380	15	-34	-4
6	120500	Rape or colza seeds, broken or not	375	39	85	4
7	081010	Strawberries, fresh	277	20	-19	13
8	060410	Mosses and lichens suitable for bouquets or for ornamental purposes	233	1	-2	8
9	080132	Cashew nuts, without shell, fresh or dried	224	31	46	8
10	071350	Broad beans and horse beans, dried, shelled, whether skinned/split or not	200	19	41	7

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 6B: World top 10 HS6 agricultural product imports ranked by growth in value between 2000 and 2004

Rank	HS6		Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %
			World imports	SA Exports	World imports	SA Exports
1	110820	Inulin	51	No trade	74	No trade
2	151321	Palm kernel or babassu oil, crude	27	No trade	61	No trade
3	040811	Egg yolks, dried	26	0	39	43
5	200510	Homogenised vegetables, prepared/preserved, other than by vinegar/acetic acid, not frozen	25	46	24	0
6	020900	Pig fat, lean meat, free & poultry fat, unrendered, fresh, chilled, frozen or cured	24	12	62	-59
7	210120	Tea or maté extracts, essences & concentrates & preparations thereof	21	17	20	-60
8	020422	Sheep cuts, bone in, fresh or chilled	20	84	26	32
9	150600	Animal fats & oils & their fractions n.e.s., refined or not, but not chemically modified	19	No trade	78	No trade
10	160290	Meat, meat offal or blood, prepared or preserved, n.e.s.	19	-10	31	7
11	170240	Glucose, incl. syrup containing in dry state min 20% but <50% by wt of fructose	19	86	26	273

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 7B: World top 10 HS6 agricultural product imports ranked by growth in value between and 2003 and 2004

Rank	HS6		Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %
			World imports	SA Exports	World imports	SA Exports
1	230500	Ground-nut oil-cake & other solid residues, ground/pelleted or not	135	No trade	-3	No trade
2	150430	Marine mammal fats & oils & their fractions, refined or not, but not chemically modified	78	-39	-6	-1
3	150600	Animal fats & oils & their fractions n.e.s., refined or not, but not chemically modified	78	No trade	19	No trade
4	110820	Inulin	74		51	
5	040520	Dairy spreads	64	-54	18	10
6	020900	Pig fat, lean meat, free & poultry fat, unrendered, fresh, chilled, frozen or cured	62	-59	24	12
7	151321	Palm kernel or babassu oil, crude	61	No trade	27	No trade
8	200819	Nuts and seeds n.e.s. incl. mx, otherwise prepared or preserved, sugared, sweetened, spirited or not	55	47	18	-22
9	110314	Rice groats and meal	54	No trade	-60	No trade
10	120810	Soya bean flour & meals	48	-64	7	45

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 8B: World top 10 HS6 agricultural product exports ranked by growth in value between 2000 and 2004

Rank	HS6		Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %
			SA Exports	World imports	SA Exports	World imports
1	170191	Refined sugar, in solid form, containing added flavouring or colouring matter	339	15	24	10
2	040610	Cheese, fresh (including whey cheese), unfermented, and curd	197	14	65	18
3	160210	Homogenised preparations of meat and meat offal	177	13	202	39
4	040620	Cheese, grated or powdered, of all kinds	157	12	614	16
5	020410	Lamb carcasses and half carcasses, fresh or chilled	152	5	86	11
6	240310	Smoking tobacco, whether containing tobacco substitutes in any proportion or not	145	6	201	11
7	170220	Maple sugar and maple syrup	118	12	-49	12
8	170260	Fructose & fructose syrup n.e.s., containing in dry state >50% by wt of fructose	115	2	373	0
9	020311	Swine carcasses and half carcasses, fresh or chilled	112	7	152	24
10	021012	Bellies, streaky and cuts thereof, swine, cured	109	21	-15	20

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Table 9B: World top 10 HS6 agricultural product exports ranked by growth in value between and 2003 and 2004

Rank	HS6	South African exports (foods)	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2003 & 2004, %	Annual growth in value between 2000 & 2004, %	Annual growth in value between 2000 & 2004, %
			SA Exports	World imports	SA Exports	World imports
1	151311	Coconut (copra) oil, crude	3367	22	26	3
2	200710	Homo prep (jams, fruit jellies, etc.) cooked, prepared, sugared/ sweetened or not	1177	38	77	13
3	240290	Cigars, cheroots, cigarillos and cigarettes, containing tobacco substitutes	928	-3	30	27
4	160419	Fish n.e.s., prepared or preserved, whole or in pieces, but not minced	922	29	57	2
5	160300	Extracts & juices of meat, fish or crust ,molluscs/other aquatic invertebrates	855	4	87	0
6	160250	Bovine meat and meat offal n.e.s., excluding livers, prepared or preserved	670	20	27	10
7	200880	Strawberries n.e.s., otherwise prepared/preserved, sugared, sweetened/spirited or not	655	16	34	16
8	071030	Spinach, N-Z spinach and orache spinach (garden spinach), frozen	650	30	103	4
9	180310	Cocoa paste, not defatted	650	-5	0	26
10	040620	Cheese, grated or powdered, of all kinds	614	16	157	12

Source: Trade and Industrial Policy Strategies: www.tips.org.za

Annexure C

Table 1C: Top 3 destinations of the top 20 South African export commodities and their respective barriers

Rank	HS4	Product	Importing country	Trade regime description	Applied tariffs	Total ad valorem equivalent tariff (estimated)
1	1210	Hop cones, fresh or dried	Zimbabwe	MFN duties (Applied)	15.00%	15.00%
			Germany	Preferential tariff for South Africa	0.00%	0.00%
			Tanzania	MFN duties (Applied)	0%	0%
2	1205	Rape or colza seeds, broken or not	Angola	N/A		
			Malawi	MFN duties (Applied)	0%	0%
			Zimbabwe	MFN duties (Applied)	5.00%	5.00%
3	0905	Vanilla	Germany	Preferential tariff for South Africa	0.00%	0.00%
			Mozambique	MFN duties (Applied)	25.00%	25.00%
			United Kingdom	Preferential tariff for South Africa	0.00%	0.00%
4	1212	Locust beans	Germany	Preferential tariff for South Africa	0.00%	0.00%
			Morocco	N/A	NA	NA
			Japan	MFN duties (Applied)	0.00%	0.00%
5	0409	Natural honey	Korea	MFN duties (Applied)	1000%	1000%
			United Kingdom	Preferential tariff for South Africa	10.80%	10.80%
			Angola	MFN duties (Applied)	10.00%	10.00%
6	0703	Onions, garlic and leeks, fresh or chilled	Angola	MFN duties (Applied)	15.00%	15.00%
		Onions, garlic and leeks, fresh or chilled	Mozambique	Preferential tariff for South Africa	0.00%	0.00%
		Onions	Netherlands	Preferential tariff for South Africa	5.20%	5.20%
		Garlic		Preferential tariff for South Africa	0.00%	0.00%
		Leeks		Preferential tariff for South Africa	5.60%	5.60%
7	0104	Live sheep and goats	Mauritius	MFN duties (Applied)	0.00%	0.00%
			Uganda	MFN duties (Applied)	0.00%	0.00%
			Rwanda	MFN duties (Applied)	5.00%	5.00%
8	0706	Carrots, turnips and salad beetroot, fresh or chilled	United Kingdom	Preferential tariff for South Africa	7.40%	7.40%
			Angola	MFN duties (Applied)	15.00%	15.00%
			Zambia	Preferential tariff for South Africa	15.00%	15.00%
9	0101	Live horses, asses, mules and hinnies	United States	Preferential tariff for AGOA countries	0.00%	0.00%
			Angola	MFN duties (Applied)	2.00%	2.00%
			UAE	MFN duties (Applied)	0.00%	0.00%
10	0103	Live swine	UAE	MFN duties (Applied)	0.00%	0.00%
			Saudi Arabia	General tariff	0.00%	0.00%
			Zimbabwe	MFN duties (Applied)	25.00%	25.00%

Rank	HS4	Product	Importing country	Trade regime description	Applied tariffs	Total ad valorem equivalent tariff (estimated)
11	1007	Grain sorghum	Zimbabwe	MFN duties (Applied)	15.00%	15.00%
			Angola	MFN duties (Applied)	2.00%	2.00%
			Uganda	MFN duties (Applied)	25.00%	25.00%
12	0704	Cabbages and cauliflowers, fresh or chilled	United Kingdom	Preferential tariff for South Africa	5.2% - 7.4%	5.2% - 7.4%
			Angola	MFN duties (Applied)	15.00%	15.00%
			Mozambique	MFN duties (Applied)	25.00%	25.00%
13	0810	Fruits n.e.s., fresh	United Kingdom	Preferential tariff for South Africa	2.80%	2.80%
			France	Preferential tariff for South Africa	2.80%	2.80%
			Netherlands	Preferential tariff for South Africa	2.80%	2.80%
14	0808	Apples, pears and quinces, fresh	United Kingdom	Preferential tariff for South Africa	3.70%	3.70%
			Netherlands	Preferential tariff for South Africa	3.70%	3.70%
			Belgium	Preferential tariff for South Africa	3.70%	3.70%
15	0102	Live bovine animals	Mauritius	MFN duties (Applied)	0.00%	0.00%
			Mozambique	Preferential tariff for South Africa	0.00%	0.00%
			Rwanda	MFN duties (Applied)	5.00%	5.00%
16	1201	Soya beans, broken or not	Zimbabwe	MFN duties (Applied)	5.00%	5.00%
			Malawi	MFN duties (Applied)	0.00%	0.00%
			Zambia	Preferential tariff for South Africa	0.00%	0.00%
17	0701	Potatoes, seed	Angola	MFN duties (Applied)	5.00%	5.00%
		Potatoes, excl. seed		Preferential tariff for South Africa	15.00%	15.00%
		Potatoes, seed	Mozambique	Preferential tariff for South Africa	0.00%	0.00%
		Potatoes, excl. seed		MFN duties (Applied)	25.00%	25.00%
		Potatoes		Mauritius	MFN duties (Applied)	0.00%
18	0801	Brazil nuts	Mozambique	MFN duties (Applied)	25.00%	25.00%
		Cashews		Preferential tariff for South Africa	0.00%	0.00%
		Coconuts		MFN duties (Applied)	25.00%	25.00%
		Brazil nuts	Zimbabwe	MFN duties (Applied)	15.00%	15.00%
		Cashews		MFN duties (Applied)	15.00%	15.00%
		Coconuts		MFN duties (Applied)	10.00%	10.00%
		Brazil nuts	Zambia	Preferential tariff for South Africa	15.00%	15.00%
		Cashews		Preferential tariff for South Africa	15.00%	15.00%
		Coconuts		Preferential tariff for South Africa	15.00%	15.00%
19	0802	Nuts n.e.s.	United States	Preferential tariff for AGOA countries	0.00%	0.00%
			Netherlands	Preferential tariff for South Africa	0.00%	0.00%
			Japan	MFN duties (Applied)	0.00%	0.00%
20	0805	Citrus fruit, fresh or dried	United Kingdom	Preferential tariff for South Africa	7.90%	7.90%
			Netherlands	Preferential tariff for South Africa	7.90%	7.90%
			Belgium	Preferential tariff for South Africa	7.90%	7.90%

