



QUARTERLY  
**Economic  
Overview  
of the  
Agriculture,  
Forestry and  
Fisheries Sector**

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## PREFACE

The core business of the Directorate: Statistics and Economic Analysis is to provide economic and statistical services to monitor the economic performance of the Agriculture, Forestry and Fisheries (AFF) sector. To support this important task, the Economic and Statistical Research division/unit conducts economic analyses of the performance of and external impact on the AFF sector and its industries.

This publication, the *Quarterly Economic Overview of the Agriculture, Forestry and Fisheries sector*, was developed because of a need within the Department of Agriculture, Forestry and Fisheries (DAFF) to be regularly informed on developments and expected economic trends in the agriculture sector. The quarterly report has now been established as a regular feature in the directorate's work plan. Since the beginning of 2004 the report has also been published for outside use to add value to a number of regular economic publications on the agriculture sector. It is our vision to maintain it as indispensable reading for everyone interested in developments in the AFF and the South African AFF sector.

This issue looks at the economic developments in the second quarter of 2011 as well as the expected economic trends in the South African AFF sector as the domestic and global economies continue to recover from the global economic recession.

Any new comments on the content of this quarterly report series are most welcome.

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## EXECUTIVE SUMMARY

The global economy has entered a new phase marked by weaker global activity, sharp falls in confidence and growing downside risks. Prospects for emerging market economies – which have been carrying the global economy while advanced economies struggle to recover from recession – have become more uncertain again although growth is expected to remain fairly robust. Economic activity in advanced economies was negatively affected by the devastating earth-quake which hit Japan; the greater-than-expected weakness in US economic activity; as well as the downside risks from the euro debt. Following a 5,1% economic growth rate in 2010, the global economy is expected to expand at an annualised rate of 4,0% in 2011, remaining the same in 2012.

As global grain consumption continues to outpace global grain production, a 16 million tons deficit is forecast for the 2011/2012 season. World grain production for 2011/2012 is forecast at 1 808 million tons while world grain consumption is forecast at 1 824 million tons. Although the industrial use of grain for bio-fuels is declining, there has been a sharp increase in the use of grain for feed and for food. Global feed use is expected to increase by 17 million tons to 766 million tons in 2011/2012. Grain prices are expected to remain high in 2011/2012 due to tight supplies; while the global grain trade is expected to remain relatively flat at 244 million tons, up one million ton from the year ended in June 2011.

The SA economy slowed sharply in the second quarter of 2011, growing by just 1,3% following a 4,5% growth rate in the first quarter of 2011. The main contributor to the slowing economy was the manufacturing sector which recorded a negative growth of 7% after expanding by 14,5% in the first quarter of 2011. Economic activity in the agriculture, forestry and fishing sector contracted for the second consecutive quarter, recording a negative growth of 7,8% in the second quarter from a 3,7% contraction in the first quarter of 2011. This was mainly due to negative contribution by field crops and animal products.

As the SA economy contracts, the unemployment rate rose even further to 25,7% in the second quarter of 2011, up from 25% in the previous quarter. The number of unemployed persons rose by 174 000 from 4,36 million in the first quarter of 2011 to 4,40 million in the second quarter. Employment in agriculture declined for the fourth consecutive quarter with the sector shedding 5 000 jobs quarter-on-quarter and 32 000 jobs year-on-year during the second quarter of 2011. However, sector comparisons show that the manufacturing sector

took the largest knock in terms of job losses, losing 68 000 jobs in the second quarter, followed by mining (31 000) and the trade sector (18 000).

Gross farm income from all agricultural products amounted to R40,5 billion in the second quarter of 2011, a 1,3% increase from R39,7 billion recorded in the second quarter of 2010. Gross income from animal products increased by 4,0% year-on-year to reach R17,1 billion in the second quarter of 2011 while gross income from field crops and horticultural crops decreased by 0,6% and 0,8% respectively, during the second quarter of 2011 compared to the same quarter of 2010. Following a 20,4% drop in the first quarter of 2011, the net farm income recorded another significant decline of 11,1% from R17,0 billion in the second quarter of 2010 to R15,3 billion in the second quarter of 2011. This decline can be partly attributed to the 13,1% increase in expenditure on intermediate goods and services compared to the slight increase in gross farm income. Consumption expenditure on food increased by 2,5% from R84,9 billion in the second quarter of 2010 to R87,0 billion in the second quarter of 2011.

The value of agricultural exports increased by 7% from R12,4 billion in the second quarter of 2010 to R13,3 billion in the second quarter of 2011. During the same period, the value of agricultural imports increased by 25% from R7,7 billion to R9,6 billion. Following a decline in the first quarter of 2011, fisheries exports increased significantly by 18% from R527 million in the second quarter of 2010 to R623 million in the second quarter of 2011. Fisheries imports on the other hand declined by 25% from R346 million to R259 million during the same period. The export value of forestry products amounted to R2,3 billion in the second quarter of 2011, a 2% increase compared to the second quarter of 2010; while forestry imports increased by 8% to R1,6 million during the same period.

## 1. GLOBAL OVERVIEW OF THE AGRICULTURAL ECONOMY

Global growth remained subdued in the second quarter of 2011 as the devastating effects of the earthquake on the Japanese economy and the slowdown in the United States activity hit global output. Also, the downside risks from euro debt crisis and greater-than-expected weakness in U.S. activity is expected to keep global output unbalanced.

The global economy is expected to expand at an annualised rate of 4,0% in 2011, and will remain flat at 4,0% in 2012. Growth in advanced economies is expected to slowdown significantly to 1,6% in 2011, before rising slightly to 1,9% in 2012. Though slowing down, growth in emerging and developing economies remains strong, expanding at an annualised rate of 6,4% in 2011, and is expected to drop to 6,1% in 2012. Global inflation picked up from 3,5% in the last quarter of 2010, to 4% in the first quarter of 2011 mainly because of larger than expected increases in commodity prices.

As the new marketing season (2011/2012) for major food crops has begun in July, world grain production is expected to accelerate to 1 808 million tons, from 1 748 million tons in the previous season, which represents a 3,4% increase. While

prospects of the global crop look good, dominant concerns were about the reduced maize production in the U.S; however, this has been offset by raised production of maize in Brazil, Ukraine and EU-27 coupled with the raised production of wheat in major wheat producing countries. The anticipated increase in global grain production mostly reflects the rise in food and feed use while the rate of increase of industrial use of grain for biofuels is seen to be slowing down compared to the previous season.

Global feed use is expected to increase to 766 million tons in 2011/2012, from 749 million tons in the previous marketing year. The global grain trade forecast for 2011/2012 is almost unchanged at 244 million tons, up one million tons from the year ended June 2011. The outturn, underpinned by increased wheat exports and expected record Ukraine shipments of maize, has more than offset reductions in the U.S. maize exports. World wheat production and consumption are forecast to be balanced in 2011/2012, with a rise in production (677 million tons) matched by higher use (678 million tons). Global wheat production increased by 4% from 651 million tons in the previous season to 677 million tons in 2011/2012 due to favourable weather conditions across major wheat producing countries. A further increase in projected demand of wheat for feed has contributed to a larger than normal upturn in

world wheat consumption, from 657 million tons in the previous season to 678 million tons in 2011/2012.

Global maize production forecast is raised by 3% in 2011/2012, from 824 million tons in 2010/2011 to 849 million tons. However, maize output is projected to be affected by demand, with maize for feed expected to be negatively affected by increased demand for poor quality wheat and a reduction in demand for maize destined for biofuel production. Despite expected ample production in 2011/2012, grain prices are expected to remain high as total global production barely meet demand for grain. Global grain consumption is expected to exceed supply by a total of 16 million tons. However, Russia's decision to lift its grain export ban from July is expected to soften price shocks.

## 2. THE STATE OF THE DOMESTIC ECONOMY OF AGRICULTURAL, FORESTRY AND FISHERIES

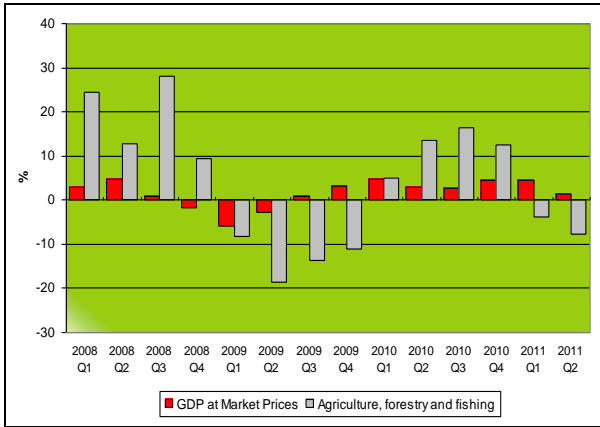
### 2.1 Growth

The real Gross Domestic Product (GDP) at market prices slowed more than expected in the second quarter of 2011, falling to a seasonally adjusted and annualised 1,3% as compared to the previous quarter, and 3% as compared to the previous year. The slack in output growth came mainly from the

manufacturing, mining and agriculture sectors. Growth in the manufacturing sector declined by 7% quarter-on-quarter, mainly due to lengthy strike in the automotive industry and weaker exports. The mining sector output fell by 4,2% quarter-on-quarter mainly due to a decline in production of metal ores, gold and coal, while output in agriculture dropped due to lower production of field crops and animal products. Growth in other sectors of the economy also remained subdued, with the construction activity growing by only 0,5% while the finance and real estate industries slowed to 2,9%. The wholesale, retail, motor trade and accommodation industries eased slightly on softer consumer spending.

Figure 1 indicates that the real value added by agriculture, forestry and fisheries sector recorded a negative growth of 7,8% in the second quarter of 2011, as compared to a negative growth of 3,7% recorded in the previous quarter. The agricultural sector remains the worst performer, attributed to a disappointing field crop season.





**Figure 1: Trends in the real GDP growth and the growth in the real value added by the sector.**

Source: Stats SA

In figure 2, the economy’s real value added moderately increased from R1,88 trillion recorded in the previous quarter to R1,89 trillion in the second quarter of 2011. On the other hand, the agriculture, forestry and fisheries sector’s value added continued to decline in the second quarter of 2011, from R42,88 billion in the first quarter to R42,02 billion in the second quarter of 2011.



**Figure 2: Trends in the real GDP and the real value added by the sector.**

Source: Stats SA

## 2.2 Inflation

The Producer Price Index (PPI) for domestic products picked up further in July 2011, rising to 8,9% year-on-year, from 7,4% in June. Over the month, prices rose by 2,7% due to higher electricity prices, increase in the price of gas and water as well as agriculture and other commodity price increases. Food prices at the agricultural level rose by 0,9% month-on-month and by 5% annually. The largest price increase came from fruits and grains which increased by 5,4% and 2,7%, respectively, month-on-month.

Figure 3 shows that producer prices on the agriculture, forestry and fishing sector, including mining, declined to 5% in the second quarter of 2011 as compared to 5,9% in the first quarter of 2011. However, looking at agriculture alone, producer prices increased to 4,7% as compared to 2,2% in the first quarter. After reaching its highest peak of 26,3% in the third quarter of 2010, producer prices in the forestry sector continued to level off, with prices declining to 7,2% in the second quarter of 2011, from 11% in the first quarter. Meanwhile, producer prices in the fisheries sector declined for the second quarter in a row, to 6,3% in the second quarter of 2011, from 0,9% in the first quarter.

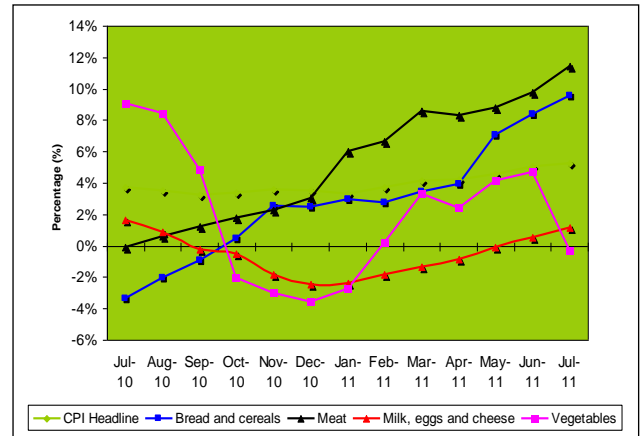


**Figure 3: Trends in the PPI inflation**  
Source: Stats SA

The annual consumer price index (CPI) rose further in July, increasing to 5,3% year-on-year, up from 5% in June. The main culprits to inflation continue to be high food and fuel prices as well as increases in administered costs. Prices rose by 0,9% in July as compared to June, underpinned by increases in electricity tariff, which went up by 16%, as well as water and other services which rose by 8,7% as compared to last month. Car prices together with public transport costs also contributed to the rise in July inflation, however, petrol prices fell by 3,2% in that month. Food prices rose to 7,5% year-on-year, up from 7,3% in June. High food inflation was driven by the persistent rise in prices of breads and cereals, meat, as well as oils and fat. Inflation in the hotel and restaurant category also advanced, increasing to 5,4% from 1,1% the previous year.

Figure 4 shows changes in prices of selected major South African food products and compares the items with the overall

inflation. The annual inflation of bread and cereals; meat; as well as milk, eggs and cheese rose to 9,5%, 11,4%, and 1,1%, respectively in July 2011. The annual inflation of bread and cereals, as well as meat has been persistently rising since October 2010, while that of milk, eggs and cheese started rising in June 2011, after a moderate slowdown of 0,1% in May. Meanwhile, vegetable inflation declined to 0,3% in July 2011 following a rise of 4,7% and 4,1% in June and May, respectively.



**Figure 4: Trends in the CPI inflation**  
Source: Stats SA

### 2.3 Employment

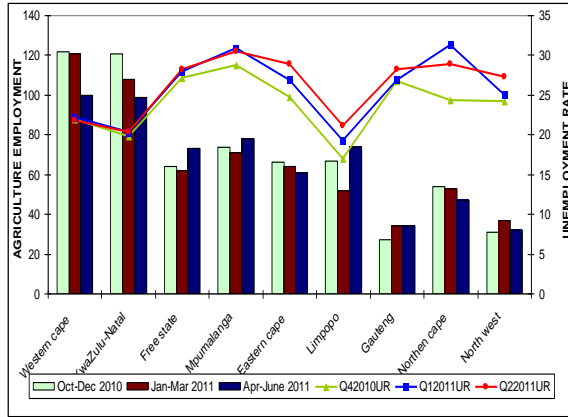
During the second quarter of 2011, the number of unemployed persons rose by 174 000, from 4,3 million to 4,5 million, pushing the unemployment rate to 25,7% from 25% in the first quarter. The labour force, which is a category of ages between 15 – 64 years rose by 181 000 to 17,7 million in the second quarter. Data from the Labour Force Survey indicates that the rate of new entrants in the labour market has increased

faster than jobs created in the economy. Only 7 000 jobs were created in the second quarter of 2011 compared to the previous quarter – a figure too little to offset a strong rise in the labour force. The formal sector contracted by 21 000 jobs, while the informal sector gained 34 000 jobs in comparison to the previous quarter. The quarter-on-quarter change to women employment was 0,5%, which translates to 29 000 more women employed during the second quarter of 2011. Meanwhile, men did not fair well in employment, with a 0,3% (22 000) loss in employment compared to the previous quarter.

During the same period, the number of women employed in the agricultural sector declined by 17 000, which is a 11,2% decline year-on-year and 8,2% decline in comparison to the previous quarter. In contrast, men in the agricultural sector fared well in employment, gaining 12 000 jobs, which is equivalent to a 3% increase. However, employment of men in agriculture declined by 1,9% as compared to the previous year. The overall employment in the agricultural sector slowed down for the fourth quarter in a row, with a loss of 5 000 jobs quarter-on-quarter, equivalent to a 0,8% decline, and 32 000 job losses within a year, which represents a 5,1% fall in employment year-on-year. However, sector comparisons shows that the manufacturing sector took the largest knock in terms of job

losses, which accounted for 68 000 job losses, followed by mining (31 000) and the trade sector (18 000). The rate of employment decreased faster in the mining sector at 9,9%, followed by utilities (4,1%) and manufacturing (3,8%) as compared to the previous quarter. During the second quarter of 2011, employment among the population groups increased, except for the Coloured group which experienced the largest job losses of 6% (93 000 people). Blacks were the largest group that gained employment (57 000) followed by Whites (30 000) and Indians (13 000).

Figure 5, illustrates the distribution of agricultural sector employment across the nine provinces. Overall employment in the agricultural sector across provinces declined during the second quarter of 2011 except for Limpopo, Free State, and Mpumalanga which posted huge gains in employment of 42,3%, 17,7% and 9,9% respectively, compared to the previous quarter. The highest rise of employment in Limpopo can be attributed to the provincial government's initiatives to improve transport systems and to revitalize irrigation systems in the province. The highest rate of job losses in the agricultural sector were recorded in Western cape (17,4%), followed by North West (13,5%) and the Northern Cape (11,3%) as compared to the previous quarter.

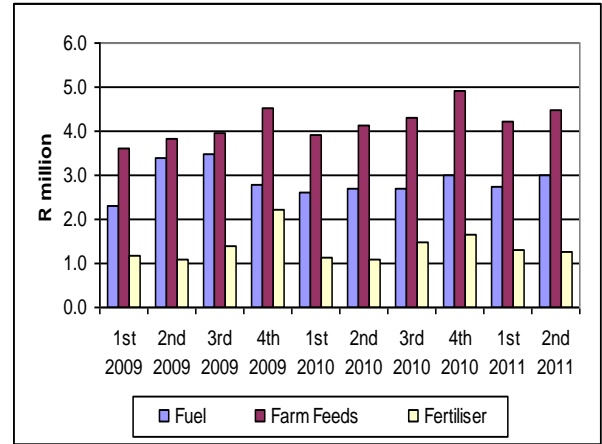


**Figure 5: Provincial agricultural employment**  
Source: Stats SA

## 2.4 Expenditure on intermediate goods and services by the agricultural sector

During the second quarter of 2011, the expenditure on intermediate goods and services increased by 13,1% to reach R20,2 billion, from R17,8 billion in the second quarter of 2010. Farm feeds remained the largest expenditure item during the second quarter of 2011 amounting to R4,5 billion, followed by farm services at R3,3 billion and fuel at R3,0 billion. The highest expenditure increase during the second quarter of 2011 compared to the second quarter of 2010 was recorded by dips and sprays which increased by 22%, followed by seeds and plants (18%) and packing material (18%). Farm services increased by 15,7% while fertilisers and fuel increased by 13,4% and 11,1% respectively, during the same period. (Appendix A.1)

Figure 6 illustrates quarterly changes in expenditure on fuel, farm feeds and fertiliser since 2009.



**Figure 6: Trends in the expenditure on fuel, farm feeds and fertiliser between 2009 and 2011**  
Source: DAFF

## 2.5 Nominal gross farm income and net farm income from agricultural products

Real gross farm income from all agricultural products amounted to R40,5 billion in the second quarter of 2011, an increase of 1,3% from the R39,7 billion recorded in the second quarter of 2010. (Appendix A.2) Gross income from field crops decreased slightly by 0,6% from R12,3 billion to R12,2 billion during the same period. The decline in gross income from field crops is largely attributed to the 32,9% decline in income from maize, which declined from R6,6 billion in the second quarter of 2010 to R4,4 billion in the second quarter of 2011. The decline in income from maize was mainly as a result of extensive crop failure which resulted from

the fact that 82,000 hectares of genetically-manipulated maize failed to produce hardly any seed and also as a result of the maize surplus that led to total area planted to maize falling by 8,0% to 2,5 million hectares after land used for maize was utilized for soybeans and sunflower production. Other income decreases were recorded in crops such as lucerne seed, groundnuts and hay which decreased by 46,3%, 30,4% and 23,6% respectively. Income from sunflower seed more than doubled, increasing from R1,1 billion in the second quarter of 2010 to R2,8 billion in the same quarter of 2011. The sharp increase in income from sunflower seed followed a record area planted to sunflower seeds after prices surged, encouraging SA producers to switch away from maize. Farmers are estimated to have planted about 575,200 hectares of sunflower seeds, up from 397,700 hectares a year ago.

Income from cotton also increased sharply during the same period and this can be attributed to an increase in local cotton production for the first time in seven years. According to the International Cotton Advisory Committee (ICAC) the main reasons for the surge in prices include low world stocks, lower than expected production, robust demand and panic buying at the beginning of the season.

Gross income from animal products increased by 4,0% to R17,1 billion in the

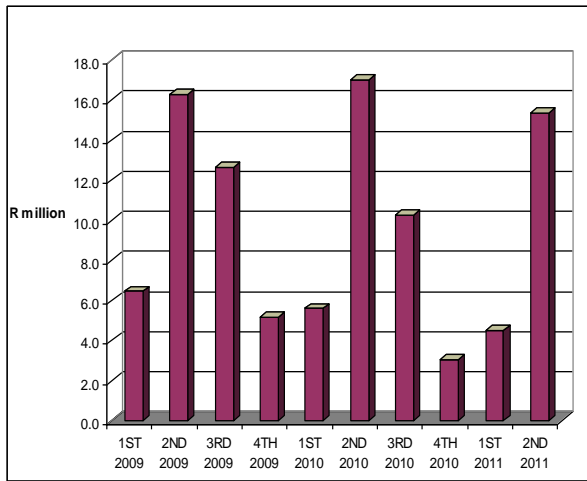
second quarter of 2011 from R16,4 billion in the second quarter of 2010 (Appendix A.2). The largest income increase in this category was recorded by wool which increased by 94,6% supported by a healthy demand from the major wool-consuming countries while supply concerns were also the main drivers behind sales. Income from poultry meat, which is the largest contributor to income from animal products, increased by 6,0% from R6,1 billion to R6,5 billion during the period under review. The largest decline was recorded by income from ostrich feathers and products which declined by 63,5%.

Gross income from horticultural products decreased marginally by 0,8%, to R11,2 billion in the second quarter of 2011 compared to the second quarter of 2010. Income from vegetables, which is the largest contributor to income from horticultural products, increased by 12,2% from R2,8 billion in the second quarter of 2010 to R3,1 billion in the second quarter of 2011. Income from the second largest contributor, which is deciduous and other fruit, declined by 5,6% during the same period. The largest income increase of 62,8% was recorded by rooibos tea while the largest income decrease of 90,8% was recorded by dried fruit.

Figure 7 shows that the net farm income in the second quarter of 2011 was lower



compared to the net farm incomes for second quarters of both 2010 and 2009.



**Figure 7: Trends in the net farm income between 2009 and 2011**

Source: DAFF

The net farm income in the second quarter of 2011 was R15,3 billion, a decrease of 11,1% compared to R17,0 billion in the second quarter of 2010. The net farm income in the second quarter of 2009 was estimated at R16,3 billion . The decrease in the net farm income is mainly attributed to an increase of 13,1% in expenditure on intermediate goods and services whilst gross farm income only registered a slight increase of 1,3%.

## 2.6 Private consumption expenditure on agricultural products

During the second quarter of 2011, private expenditure on food amounted to R87,0 billion, an increase of 2,5% compared to the R84,9 billion reported for the second quarter of 2010. The main expenditure items were

oils and fats which increased significantly by 25,7% together with expenditure on sugar which also increased significantly by 21,4%. Expenditure on potatoes increased by 10,5% while expenditure on meat as well as expenditure on fruit and vegetables increased by 6,2% and 4,5% respectively. During the same period, the expenditure on bread and grain decreased by 5,2% while expenditure on milk, milk products and eggs also decreased by 2,9%. (Appendix A.3)

## 2.7 Trade of agricultural, forestry and fisheries products

### 2.7.1 Agricultural trade

According to data on table A.4, trade of agricultural products improved significantly between the second quarter of 2010 and the second quarter of 2011 with the total export value of agricultural products increasing by 7%, from R12,4 billion to R13,3 billion between the second quarter of 2010 and the second quarter of 2011. During the second quarter of 2011, South Africa gained most of its agricultural export revenue from products exported to the Netherlands. From this country alone, South Africa gained R1,5 billion of agricultural export revenue which represents 11% of the total export value. United Kingdom was the second largest export destination for South Africa's agricultural exports with R1.1 billion of agricultural export revenue received,

representing 9% of the total export value. Other countries from which a substantial amount of agricultural export revenue was received include Mexico, Zimbabwe, Mozambique, Russia, Germany, China, United States and Hong Kong. All of these countries including the Netherlands and United Kingdom accounted for 54% of the total export revenue received from agricultural products.

The most important agricultural products which contributed a considerable amount to the total agricultural export value include maize (9%), fresh oranges (8%), wine grapes (in 2 litres) 7% and fresh apples (Table A.5).

The total import value of agricultural products increased significantly between the second quarter of 2010 and the second quarter of 2011. According to data on Table A.6, the import value increased by 25% from R7,7 billion to R9,6 billion between the second quarter of 2010 and the second quarter of 2011. The top ten sources of agricultural imports into SA during the second quarter of 2011 collectively accounted for 66% of the total import value of agricultural products (Table A.6). Argentina, United States, Brazil and Thailand were the top 4 sources of agricultural imports during the second quarter of 2011, accounting for 16%, 9%,

7% and 6% respectively of the total import value of agricultural products.

The 4 most important agricultural products which contributed a considerable amount to the total import value include wheat and meslin (11%), soybean oil cake and other solid residue (8%), palm oil (refined but not chemically modified) 6% and rice (6%), Table A.7. These four products combined accounted for 31% of the total import value of agricultural products

### **2.7.2 Fisheries trade**

The total export value of fish and seafood improved significantly between the second quarter of 2010 and the second quarter of 2011. According to data on Table A.8, the export value improved by 18%, from R527 million to R623 million between the second quarter of 2010 and the second quarter of 2011. The major export destinations for South African fish and seafood were Spain, Italy, China, Hong Kong, United States, Cameroon, Portugal, Japan, Germany and Greece which jointly accounted for 79% of the total export revenue from fish and seafood. The biggest proportion of fish and seafood exported during the second quarter include cuttle fish and squid (dried, frozen salted or in brine), fish with bones (frozen), whiting and hake (frozen except fillets, liver and roe), lobsters (live, fresh, chilled, dried, salted or in brine) and rock lobster and other sea crawfish (frozen). Table A.9.

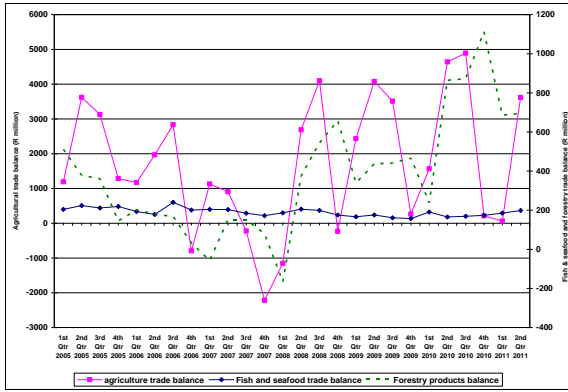
According to data on table A.10, the total import value of fish and seafood decreased considerably by 25 % from R346 million to R259 million between the second quarter of 2010 and the second quarter of 2011. The 10 major sources of imports which accounted for 87% of the total import value of fish and seafood in the second quarter of 2011 include Thailand, China, New Zealand, Norway, United States, India, Peru, Argentina, Uruguay and Taiwan. Imported products which accounted for 75% of the total import value of fish and seafood include sardines/sardinella/ brisling (prepared or preserved and not minced), tunas/skipjack/bonito (prepared or preserved and not minced), fish with bones (frozen), cuttle fish and squid (frozen, dried, salted or in brine) and molluscs (prepared or preserved). Table A.11.

### **2.7.3 Forestry trade**

The total export value of forestry products decreased marginally by 2%, from R2,34 billion to just about R2,3 billion between the second quarter of 2010 and the second quarter of 2011 (Table A.12). Export destinations of forestry products during the second quarter of 2011 include Indonesia, China, Thailand, United Kingdom, Zimbabwe, Germany, South Korea, Taiwan, the Netherlands and Mozambique which jointly accounted for 68% of the total export revenue from forestry products. The most

important forestry products which accounted for 80% of the total export revenue of forestry products include chemical woodpulp (dissolving grades), kraftliner (uncoated, bleached, in rolls or sheets), chemical woodpulp (soda etc, N Dis BI and BI nonconif), newsprint (in rolls or sheets), cartons, boxes and cases, corrugated paper and paper boards see Table A.13.

The total import value of forestry products increased by 8% from R1,47 billion to R1,59 billion between the second quarter of 2010 and the second quarter of 2011 (Table A.14). South Africa's major forestry import sources include China, United Kingdom, United States, Germany, Sweden, France, Brazil, Australia, Finland and Italy, which jointly accounted for 69% of the total import value of forestry products. The most important forestry products imported during the second quarter of 2011 include printed books, brochures etc, sanitary napkins, diapers and sanitary art of paper, paper or paperboards (light weight writing etc, clay coated over 10 mech), paper, paper boards, cellulose wadd etc, chemical woodpulp (see Table A.15). All of these products accounted for 44% of the total import value of forestry products.



**Figure 8: Trends in trade balances for agriculture, fish and seafood and forestry products.**

Source: South African Revenue Services

Figure 9 shows trends in the trade balances of agricultural, fish and seafood as well as forestry products. Between the first quarter of 2005 and the second quarter of 2011, agriculture’s trade balance fluctuated significantly experiencing a negative trade balance in five quarters (the fourth quarter of 2006, the third quarter of 2007, the fourth quarter of 2007, the first quarter of 2008 and the fourth quarter of 2008). Only after the first quarter of 2009 did agriculture’s trade balance enter a positive territory, continuing with its fluctuating trend before increasing significantly to reach R4,6 billion during the second quarter of 2010. The first quarter of 2011 started off not too well as agriculture’s trade balance deteriorated to R640 million. The value thereafter improved significantly to reach R3,6 billion during the second quarter of 2011.

Fish and seafood trade balance fluctuated significantly between the first quarter of 2005 and the second quarter of 2011,

remaining in positive territory throughout. The trade balance for forestry products fluctuated significantly between the first quarter of 2005 and the second quarter of 2011, experiencing negative trade balances in two quarters, the first quarter of 2007 and the first quarter of 2008.

## 2.8 Review of agricultural markets

### 2.8.1 Grain market review

Table B1 shows monthly and quarterly proxies of supply and demand of major grains in South Africa, i.e maize, wheat, sunflower and soya beans. South Africa harvested its biggest maize crop in three decades during the 2009/10 season, leaving it a surplus of about 4 million tons. Due to the bumper crop, South African maize producers raised concerns that the surplus will push maize prices lower. A stronger Rand also played an important role, making South African products expensive for foreign buyers.

During the second quarter of 2010, the average opening stock for white and yellow maize were 1,5 million tons and 940 000 tons respectively, while the average total opening stock (White maize plus yellow maize) was 2,5 million tons. Owing to heavy rains that fell during April 2011, and especially in June, producers in some parts of the grain producing areas are battling to collect their harvest. In some instances, producers are even using manual labour

because of soggy grounds for a harvester. The untimely rain and snow is set to delay harvesting although it is still too early to determine the effect it will have, reported Grain SA. Thus during the second quarter of 2011, the average opening stock for white and yellow maize was 1,6 million tons and 799 000 tons respectively, while the average total opening stock (white and yellow maize) was 2,4 million tons, approximately 1% less than in the second quarter of 2010. Consumption of maize in South Africa totalled 722 000 tons in the second quarter of 2010. Of this total, 453 000 tons were white maize while 269 000 tons were yellow maize. Consumption of maize during the second quarter of 2011 totalled 739 000 tons, 2% higher than in the second quarter of 2010. Of this total, 518 000 tons were white maize while 221 000 tons were yellow maize. The total maize exported during the second quarter of 2011 reached 269 000 tons which was 168 000 tons more than the 101 000 tons of maize exported during the second quarter of 2010.

According to the March 2011 edition of crop prospects and food situation, wheat planting in many countries has increased or is expected to increase this year in response to strong prices, while yield recoveries are forecast in those areas that were affected by drought in 2010. Locally, more fallow land will be available for wheat in 2011 due to the anticipated decline in maize plantings

in the summer rainfall area in 2011 (Bureau for Food and Agricultural Policy, 2010).

During the second quarter of 2010, the average opening stock of wheat for human consumption was 1,4 million tons while the average opening stock of wheat for animal feeds reached 12 000 tons. The average opening stock of wheat for human consumption during the second quarter of 2011 declined by 23% to reach 1,1 million tons, meanwhile, the average opening stock of wheat for animal feeds declined by 3% to reach 11 667 tons. The average total opening stock of wheat decreased by 23% from 1,4 million tons to 1,1 million tons between the second quarter of 2010 and the second quarter of 2011. The sharp decrease is due to the smaller wheat crop for the 2010/11 marketing season.

Consumption of wheat in the second quarter of 2010 amounted to 731 000 tons. Of this total, 718 000 tons were for human consumption, 6 000 tons were for the animal feed, while the rest was kept at producer level as seed for the next planting season. During the second quarter of 2011, consumption of wheat decreased by 1% to reach 725 000 tons. Of this total, 716 000 tons were for human consumption while the rest was kept at producer level as seed for the next planting season.



According to the Economist Intelligence Unit estimate, global sunflower production is expected to increase in 2010/11 with higher sunflower seed prices expected to persist. This should result in substantial expansion of sunflower seed and sunflower seed oil output in 2011/12. Locally, summer grain producers are expected to increase sunflower plantings at the expense of maize during 2011 as a result of the relatively higher profitability of sunflower seed production compared to maize production, especially in the Western part of the Northwest province where the potential for maize production is significantly lower than in the Eastern part of the country (Bureau for Food and Agricultural Policy, 2010). Meanwhile, during the second quarter of 2011, the total opening stock of sunflower averaged 209 000 tons which was 24 000 tons (10%) less than the recorded 233 000 tons in the second quarter of 2010. The decrease in stocks can be attributed to lower local supply due to difficult planting conditions farmers had to face in the main sunflower production areas during the 2010 planting season (Bureau for Food and Agricultural Policy, 2010). Consumption of sunflower seed decreased by 11% from 187 000 tons to 167 000 tons between the second quarter of 2010 and the second quarter of 2011. Imports of this commodity decreased significantly from 1 100 tons to no imports between the second quarter of 2010 and the second quarter of 2011.

The average opening stock of soya beans averaged 239 000 tons in the second quarter of 2011, approximately 17% more than 204 000 tons recorded for the second quarter of 2010. The increase in stock was mainly due to the increased area planted to soya beans, driven by relatively poorer profitability of maize as well as the lower input costs which has helped ease pressure of farmers' cash flow position. Consumption of soya beans increased by 19% from 113 000 tons to 134 000 tons between the second quarter of 2010 and the second quarter of 2011.

Grain prices continued to exhibit modest price gains due to higher international prices and the anticipated depreciation of the Rand/Dollar exchange rate. The price of white and yellow maize averaged R 1 091/ton and R 1 147/ton respectively, in the second quarter of 2010 while wheat, sunflower and soya bean prices averaged R 2 232/ton, R 3 370/ton and R 2 536/ton respectively, during the same period. In the second quarter of 2011, the price of white and yellow maize increased by 54% and 49% to average R1 685/ton and R 1 708/ton respectively. During the same period, the price of wheat, sunflower and soya bean increased by 40%, 19% and 27% respectively, to average R 3 120/ton, R 4 001/ton and R 3 228/ton respectively

## 2.8.2 Fruit and vegetable market review

Table B.2 shows quarterly average prices of various fruits that were traded at Fresh Produce Markets (FPMs) during the second quarter of 2009, 2010 and 2011.

Between the second quarter of 2010 and the second quarter of 2011, the average prices of apples, avocados, bananas, oranges, pears and grapes increased by 6%, 6%, 13%, 6%, 12% and 29% respectively, influenced by a combination of a fall in supplies and good uptake in most markets. During the same period, the average price of mangoes weakened, decreasing by 12%.

The quantity of selected fruits traded through the FPMs fell sharply between the second quarter of 2010 and the second quarter of 2011 on account of unfavourable weather conditions which resulted in reduced volumes. Thus the quantities of avocados, bananas, oranges, pears and mangoes decreased by 1%, 3%, 7%, 6% and 54% respectively, while the quantity of apples remained unchanged. On the other hand, the quantity of grapes showed signs of improvement, increasing by 14% during the same period (Table B.3).

Prices of a number of vegetables traded through the FPMs decreased between the

second quarter of 2010 and the second quarter of 2011 on account of increased supplies and weak uptake in markets. The prices of beetroot, carrots, cucumber, onions, potatoes and tomatoes decreased by 12%, 19%, 55%, 20%, 5% and 8% respectively (Table B.4). On the contrary, the prices of lettuce, spinach, cabbage, green beans and sweet potatoes increased by 37%, 7%, 5%, 7% and 30% respectively, due to a decrease in supplies in most markets

During the period under review, the quantity of most vegetables traded through the FPMs increased significantly, with quantities of beetroot, carrots, cucumber, onions, potatoes, tomatoes, and cabbage increasing by 18%, 18%, 71%, 24%, 10%, 4% and 2% respectively (Table B.5). On the other hand, the quantities of lettuce, spinach, green beans and sweet potatoes decreased by 13%, 9, 1% and 14% respectively.

## 2.8.3 Meat Industry Review

The domestic meat industry maintained an upward trend with regard to the gross production value, the average price per kg and the number of cattle slaughtered between the second quarter of 2010 and the second quarter of 2011. The increase in the gross production value and the average price per kg was due to the fact that when

maize prices are low, producers who produce both maize and livestock will feed their livestock maize with the aim of realizing higher value for their maize. As a result, calf prices will tend to increase as calf supply contracts. Thus between the second quarter of 2010 and the second quarter of 2011, the average price of beef trended higher, increasing by 10% from R23,64/kg to R25,94/kg. During the same period, the gross production value of beef increased by 6% from R3,9 billion to R4,1 billion. The number of cattle slaughtered increased by 3% between the second quarter of 2010 and the second quarter of 2011 from 538 720 to 556 986 (Table B.6).

Poultry trended upward during the second quarter of 2011 on tight supplies during winter months. The gross production value of poultry meat, the average price per ton and commercial production posted modest gains in the second quarter of 2011 as compared to the second quarter of 2010. The gross production value of poultry meat increased by 6% from R6,1 billion to R6,5 billion. During the same period, the average price per ton of poultry increased by 5% from R16 570/ ton to R17 450/ton. Commercial production of poultry increased by 1% between the second quarter of 2010 and the second quarter of 2011 (Table B.7).

## **2.8.4 Eggs and dairy Industry Review**

### **2.8.4.1 Eggs**

Egg production grew during the second quarter of 2011 as compared to the second quarter of 2010. Commercial production increased by 3%, from 185,1 million dozens to 190,2 million dozens between the second quarter of 2010 and the second quarter of 2011. The gross production value of eggs increased by 3%, from R1,6 billion to R1,7 billion during the same period while the average price per dozen of eggs increased by 1%, from R8,85/dozen to R8,91/dozen (Table B.8).

### **2.8.4.2 Milk**

Milk production during the first four months of 2011 was marginally below that of January to April 2010. Heavy rains and very wet conditions in the summer rainfall areas has had a negative effect on milk production as producers in most areas reported lower production. Fresh milk processors experience difficulty in obtaining enough milk to supply consumers. According to the Milk Producers Organisation economist, Dr Koos Coetzee, the current downturn may continue for longer than normal, while supply and demand may not balance until late in spring. As a result, between the second quarter of 2010 and the second quarter of 2011, the gross production value of milk decreased by 7% from R2,2 billion to R2,0 billion. During the same period, the

average price per litre of milk decreased by 7%, from R3,10/litre to R2,89/litre. Commercial production on the other hand decreased by 1%, from 710,8 million litres to 705,5 million litres of milk during the same period.

### 3. OUTLOOK OF THE AGRICULTURAL ECONOMY

#### 3.1 Production

Above normal rainfall was received over most summer rainfall areas towards the end of autumn. The above normal rainfall shifted to the central and western parts of the country in May and June and this resulted in flooding in some areas.

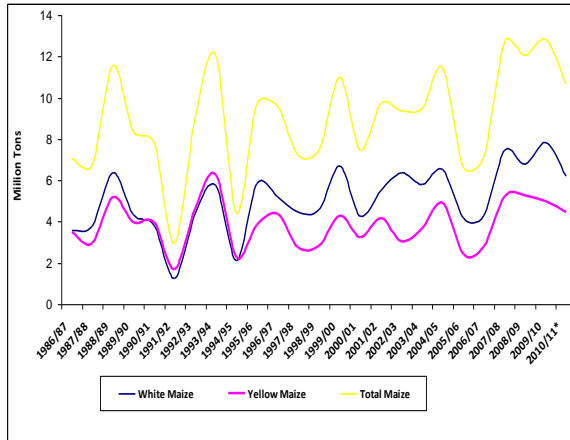
Crops are in reasonable condition except in some parts of the Western Cape where they are poor due to below normal rainfall. The quality and quantity of summer crops harvested has been reduced by floods that occurred earlier in the year.

Veld and livestock are in good condition, however, cases of Lumpy skin, Rift Valley Fever, Blue Tongue and Tribulosis were reported in the Northern Cape. Lumpy Skin Disease was also reported in Gauteng. African Horse Sickness and Contagious Abortion were reported in the North West Province, Foot and Mouth Disease in

KwaZulu-Natal, African Horse Sickness, Rift Valley Fever and Blue Tongue diseases in the Western Cape. Mortalities were reported in the Eastern Cape as a result of tick borne disease and flooding. Control measures have been carried out in all these areas. Veldfires were reported in the Free State, Gauteng, KwaZulu-Natal, Mpumalanga and North West.

Above normal rainfall is expected over most parts during late winter and the beginning of spring but below normal along the southern coast and adjacent areas. At the beginning of summer, rainfall probability decreases to below normal in most summer rainfall areas. Temperatures will start warming up during late winter into the beginning of spring (National Agro-meteorological Committee, 2011)

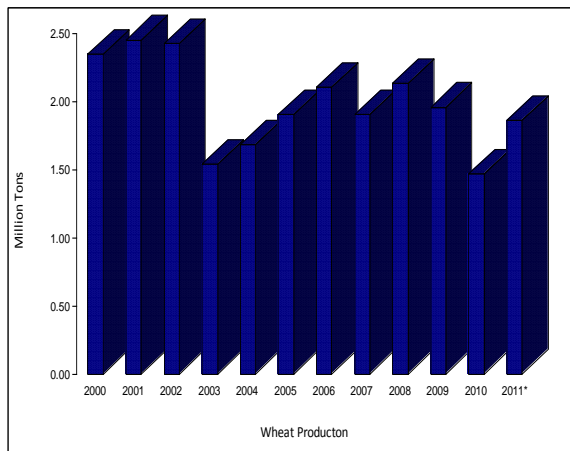
Figure 9 shows that the tons expected for maize for the 2010/2011 production season are 16,7% higher than the previous production season. The tons expected for white and yellow maize are 20,8% and 10,1% above the 2009/2010 maize tons.



**Figure 9: Maize Tons**

Source: DAFF

The tons estimated for wheat are expected to increase by 27,1% in 2011 compared to 2010 while hectares (ha) allocated to wheat have increased by 8,7%. The tons expected for wheat are slightly below the 2007 wheat tons as shown in Figure 10.

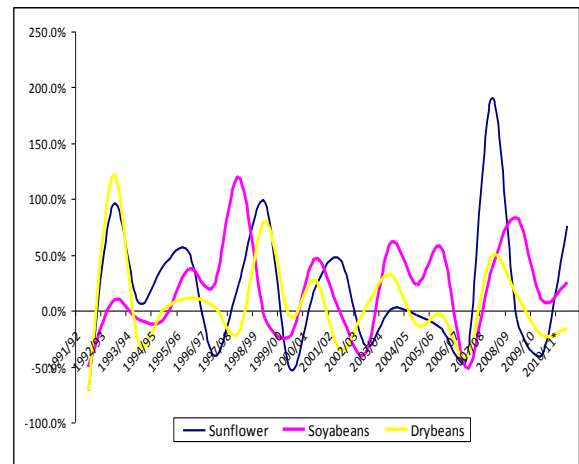


**Figure 10: Wheat**

Source: DAFF

Figure 11 shows growth fluctuations for sunflower, soybeans and dry beans associated with agricultural production. Sunflower, soybeans and dry beans are forecast to grow by 75,9%; 25,2% and -

5,2% respectively in 2010/2011 compared to the 2009/2010 season. The rise in sunflower and soybeans tons estimated can be attributable to the increased hectares allocated. The area planted to sunflower and soybeans increased by 61,6% and 34,2% whilst hectares allocated to dry beans declined by 5%. The rise in the price of oil seeds prior to the 2010/2011 production season inter-alia resulted in increased diversification to oils seed production.



**Figure 11: Sunflower, Soybeans and Dry beans**

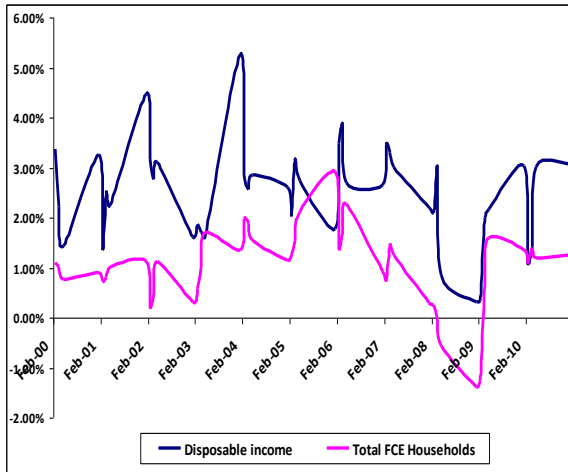
Source: DAFF

### 3.2 Consumption

Total household final consumption expenditure (HFCE) has increased by 1,3% compared to the fourth quarter of 2010, boosted by a rise in household disposable income which has risen by 3% at current prices (Reserve Bank, 2011). Quarter-on-quarter comparison shows that the HFCE



and disposable income have picked up in 2011 as depicted figure 12.



**Figure 12: Household Disposable Income and Household Final Consumption Expenditure**

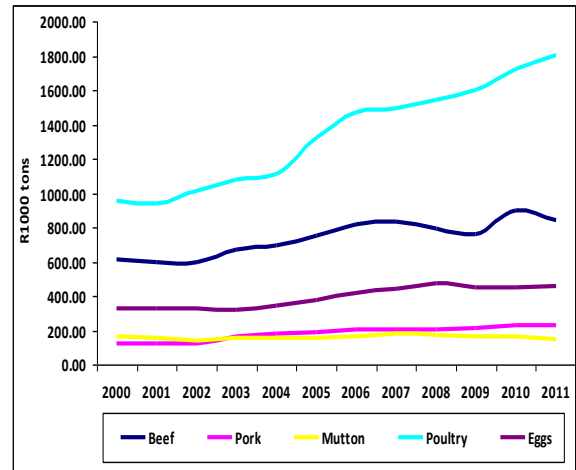
Source: South African Reserve Bank

The Bureau for Economic Research (BER, 2011) estimates consumer spending to rise by 4,5% in 2011 compared to 2010. The high prices are expected to affect the consumption of non-durable goods.

The PPI accelerated at the fastest pace in more than a year in July, reflecting increased costs of fuel, food and electricity (Statistics SA, 2011).

The consumption of high meat products is expected to decline in 2011 compared to 2010 as shown on the graph below. Beef, pork and mutton consumption is expected to decline by 7%; 1,3% and 6,3% respectively, while poultry and egg consumption is expected to increase by 5,1% and 3,2%,

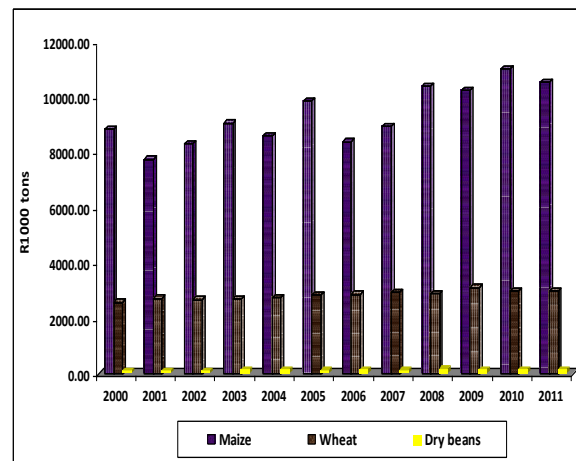
respectively. The rise in input costs is driving up the food prices leading to a change in consumption patterns as high priced food items are substituted.



**Figure 13: Meat Consumption Expectation**

Source: DAFF

As table 14 illustrates, the consumption of maize is expected to decline by 4,4% in 2011 while wheat and dry beans are expected to rise by 0,2% and 0,6% respectively.



**Figure 14: Grain Consumption Expectation**

Source: DAFF

### 3.3 Employment

The number of unemployed persons increased by 174 000 between the first quarter and the second quarter of 2011, while the number of discouraged work-seekers decreased by 16 000 in the same periods. The unemployment rate stood at 25,7% in the second quarter of 2011 an increase of 0,7% compared to the first quarter of 2011.

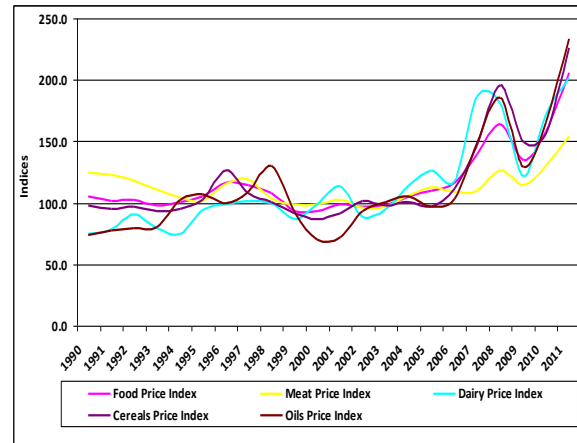
Agricultural employment has declined by 0,8% in the second quarter of 2011 compared to the first quarter of 2011, while year-on-year it has declined by 5,1%, Statistics SA (2011). Employment in agriculture, forestry and fishing declined by a yearly average rate of 13,2% between the periods 2007 and 2010. The number of highly skilled workers declined by 9,5%, skilled workers by 11,8% while semi and unskilled workers have declined by 13,5% between 2007 and 2010 (Quantec, 2011).

Agricultural employment may rise during the fourth quarter of 2011 as farmers prepare for the 2011/2012 planting season. The short-term rise in food prices may also result in increased planting decisions.

### 3.4 Inflation

The Food and Agricultural Organization (FAO) expect the international food price index to rise by 26,8% in 2011 compared to 2010 as depicted by the sharp rise in the

food price index in figure 15.



**Figure 15: International Food Price Index**

Source: FAO

The international meat, dairy, cereals and oil price indices are expected to rise by 18,7%; 17,9%; 44,7% and 41,6% respectively in 2011 compared to 2010.

The average spot price for SA white and yellow maize was R1 684 and R1 705 for the five months ending in July compared R1 099 and R1 153 during the same months in 2010. The white and yellow maize prices have risen by 53,4% and 47,9% respectively during the same period. Concerns on yield due to floods in SA as well as uncertain weather conditions in the US supported the rise in maize prices (FAO, 2011). The US maize price averaged R1 931 during the same period in 2011 compared to R1 110 during the same period in 2010; an increase of 73,9% which is currently above the local maize price

The average spot price for wheat, sunflower

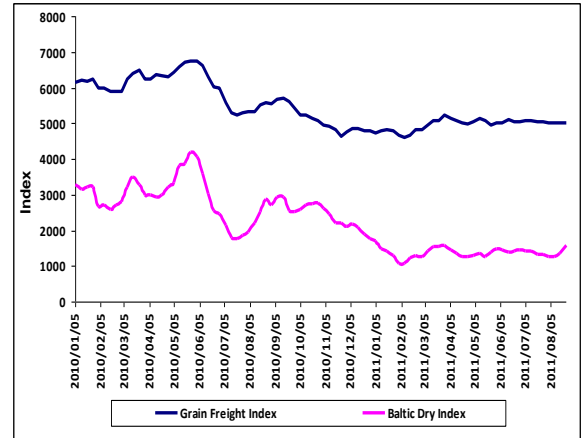
and soybeans was R3 078; R4 071 and R3 326 respectively in 2011 compared to R2 239; R3 345 and R2 588 in 2010. The price of wheat, sunflower and soybeans rose by 37,5%; 21,7% and 28,5% respectively.

Food and fuel costs continue to be the main drivers behind higher inflation. The BER expects the inflation rate to rise to 6% in quarter four of 2011 driven by high commodity and electricity prices.

The suggestion by the BER after a retail survey are that, a large gap has developed between input costs and selling prices; and that retailers did not pass the full extent of input pressures to consumers in quarter two of 2011, but low profitability will result in the full cost passed on to consumers in the second half of 2011.

### 3.5 Agricultural trade

The international freight council index shows that the grain freight shipped has declined. In the three months ending in August 2011 the index was 11,7% and 44,5% for the Grain and Baltic freight indices respectively, compared to the same months in 2010 which is an indirect indication of a fall in global demand and supply due to, amongst others, the rise in food prices.



**Figure 16: International Freight Index**

Source: DAFF

The rising food and oil prices in the midst of the global slowdown are likely to put pressure on trade in the second half of 2011.

The Rand is expected to depreciate against the US Dollar, averaging \$7 in the third quarter of 2011 and \$7,12 during the fourth quarter of 2011 (Table 1).

Although depreciation of the Rand bodes well for SA's agricultural trade, downside risks have again risen to the fore, including that the global economic recovery may be more fragile than had been thought. IMF cut its Euro zone 2011 growth forecast to 1,9% from 2% and U.S. 2011 growth to 1,6% from a 2.5% (Reuters, 2011).

**Table 1: Forecast of the exchange rate**

Quarter 2 2011		Quarter 3 2011	Quarter 4 2011
6.84	BER	7.130	7.25
	FNB	6.85	7.00
	Absa	7.00	7.10
	Average	7.00	7.12

Source: BER, FNB and ABSA

## 4. CONCLUSION

The euro debt crisis, weaker economic activity in the US and the Japan earthquake are some of the factors that have negatively affected the pace of recovery in advanced economies which slowed considerably in the second quarter of 2011. Economic activity in developing economies also registered a slower pace of increase in the second quarter of 2011 and although growth is expected to remain fairly robust, economic prospects have become more uncertain. Though fears of another global economic recession have not yet been completely ruled out, they seem to have subsided; and the global economy is expected to expand, albeit at a slower pace than last year.

Real growth in the SA economy slowed substantially in the second quarter of 2011 with real value added in the main goods-producing sectors contracting notably. The agriculture, forestry and fishing sector contracted as output declined given a smaller maize crop than that yielded in 2010 coupled with the impact of heavy rainfall which impacted negatively on field crop and livestock production.

Employment in agriculture has been declining for four consecutive quarters and with the net farm income also recording year-on-year declines for four consecutive

quarters, employment in agriculture may decline further as farmers try to cut costs.

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**Appendix A: Agricultural economic variables**

**Table A.1: Intermediate expenditure on goods and services by agriculture**

<b>Expenditure on intermediate goods and services (R million)</b>														
	Farm services	Building and fencing material	Fuel	Dips and sprays	Electricity	Maintenance and repair of machinery and implements	Fertilizers	Packing material	Seeds and plants	Farm feeds	Insurance	Water tax	Other	Total
2 <sup>nd</sup> Qtr 2009	2 443	786	3 375	722	300	1 071	1 106	1 383	1 082	3 810	299	163	39	16 788
2 <sup>nd</sup> Qtr 2010	2 854	841	2 711	880	333	1 264	1 108	1 660	1 277	4 120	335	188	41	17 826
2 <sup>nd</sup> Qtr 2011	3 303	900	3 013	1074	370	1 466	1 256	1 958	1 506	4 457	375	216	43	20 155
2 <sup>nd</sup> Qtr 2009 to 2 <sup>nd</sup> Qtr 2010	16.8%	7.0%	-19.7%	21.9%	11%	18.0%	0.2%	20.0%	18.0%	8.1 %	12.0%	15.3%	5.1%	6.2%
2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011	15.7%	7.0%	11.1%	22.0%	11.1%	16.0%	13.4%	18.0%	17.9%	8.2%	11.9%	14.9%	4.9%	13.1%

**Table A.2: Nominal gross income from agricultural products between 2009 and 2011**

Year	2009				2010				2011	2 <sup>nd</sup> Qtr 2009 to 2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011
	Quarter	2nd	3rd	4th	1st	2nd	3rd	4th	1st		
<b>Real gross income from agricultural products (R billion)</b>											
Field crops	13 253,50	11 881,08	5297,98	1740,33	12 328,74	9067,80	4528,19	1761,73	12 252,40	-7,0%	-0,6%
Horticulture	9685,43	8548,25	7155,84	8317,03	11 239,39	9328,84	6662,15	8346,73	11 152,73	16,0%	-0,8%
Animal products	15 242,70	15 469,97	16 940, 41	16 735,91	16 403,83	16 241,34	17 905,67	17 383,91	17 067,70	7,6%	4,0%
<b>Total</b>	<b>38 181,63</b>	<b>35 899,30</b>	<b>29 394,24</b>	<b>26 793,28</b>	<b>39 971,97</b>	<b>34 637,97</b>	<b>29 096,01</b>	<b>27 492,37</b>	<b>40 472,83</b>	<b>4,7%</b>	<b>1,3%</b>

Source: DAFF

**Table A.3: Private consumption expenditure on food between 2009 and 2011**

	Private consumption expenditure on food (R million)									
	Meat	Bread and grain	Sugar	Milk, milk products and eggs	Oils and fats	Potatoes	Fruit and veg.	Coffee, tea	Other	Total food
2 <sup>nd</sup> Qtr 2009	26 057	23 552	1 204	8 469	1 958	3 067	8 256	2 452	7 256	82 269
3 <sup>rd</sup> Qtr 2009	26 646	24 294	1 292	9 557	1 944	2 809	8 805	2 546	7 535	85 428
4 <sup>th</sup> Qtr 2009	27 679	23 559	1 368	10 610	1 847	3 422	9 516	2 636	7 800	88 437
1 <sup>st</sup> Qtr 2010	28 708	22 332	1 208	9 404	1 678	3 096	8 584	2 535	7 501	85 044
2 <sup>nd</sup> Qtr 2010	28 361	22 187	1 348	9 015	1 779	3 186	8 996	2 530	7 487	84 891
3 <sup>rd</sup> Qtr 2010	28 736	24 353	1 376	10 028	1 904	3 180	10 075	2 691	7 965	90 310
4 <sup>th</sup> Qtr 2010	30 184	23 951	1 546	10 536	1 907	3 769	9 677	2 756	8 157	92 483
1 <sup>st</sup> Qtr 2011	29 751	19 313	1 057	9 290	1 893	3 002	9 187	2 483	7 349	83 326
2 <sup>nd</sup> Qtr 2011	30 128	21 040	1 637	8 758	2 237	3 520	9 402	2 592	7 672	86 987
2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011	6,2%	-5,2%	21,4%	-2,9%	25,7%	10,5%	4,5%	2,5%	2,5%	2,5%

Source: DAFF



**Table A.4: Export values of agricultural products by destination between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	Export values by destination (R millions)				Export value as % of total export value		Cumulative %	
Total	11 449	12 205	12 360	13 254	-	-	-	-
Netherlands	1 399	1 167	1 313	1 514	11%	11%	11%	11%
United Kingdom	1 378	1 323	1 222	1 130	10%	9%	21%	20%
Mexico	2	2	4	903	0%	7%	21%	27%
Zimbabwe	527	801	827	844	7%	6%	27%	33%
Mozambique	516	483	1 161	597	9%	5%	37%	38%
Russia	388	286	378	522	3%	4%	40%	42%
Germany	510	470	530	466	4%	4%	44%	45%
China	239	258	371	435	3%	3%	47%	48%
United States	338	387	475	397	4%	3%	51%	51%
Hong Kong	142	191	210	395	2%	3%	53%	54%

Source: South African Revenue Services

**Table A.5: Export values of agricultural products by product between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	Export values by product (R millions)				Export value as % of total export value		Cumulative %	
Total	11 449	12 205	12 360	13 254	-	-	-	-
Corn (Maize), Other Than Seed Corn	325	1 010	234	1 238	2%	9%	2%	9%
Oranges, Fresh	553	674	769	1 012	6%	8%	8%	17%
Wine, Fr Grape Nesoi & Gr Must W Alc, Nov 2 Liters	1 088	1 091	1 062	917	9%	7%	17%	24%
Apples, Fresh	849	845	767	884	6%	7%	23%	31%
Grapefruit, Fresh Or Dried	484	442	441	621	4%	5%	26%	35%
Wool, Not Carded Or Combed, Greasy, Shorn	348	249	307	569	2%	4%	29%	40%
Pears And	433	489	537	540	4%	4%	33%	44%

Quinces, Fresh								
Mandarins (Inc Tanger Etc) & Citrus Hybr Fr Or Dri	326	359	414	451	3%	3%	37%	47%
Wine, Fr Grape Nesoi & Gr Must With Alc, Nesoi	377	394	380	384	3%	3%	40%	50%
Lemons And Limes, Fresh Or Dried	352	289	411	357	3%	3%	43%	53%

Source: South African Revenue Services

**Table A.6: Import values of agricultural products by exporting country between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	Import values by exporting country (R millions)				Import value as % of import value		Cumulative %	
Total	8 761	8 130	7 721	9 636	-	-	-	-
Argentina	981	918	724	1 523	9%	16%	9%	16%
United States	518	305	410	882	5%	9%	15%	25%
Brazil	758	928	698	718	9%	7%	24%	32%
Thailand	1 117	879	608	540	8%	6%	32%	38%
United Kingdom	401	324	447	510	6%	5%	37%	43%
China	354	636	475	497	6%	5%	44%	48%
Germany	362	521	596	491	8%	5%	51%	54%
Malaysia	559	322	354	450	5%	5%	56%	58%
Indonesia	481	276	322	404	4%	4%	60%	62%
Spain	65	60	83	377	1%	4%	61%	66%

Source: South African Revenue Services

**Table A.7: Import values of agricultural products by product between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	Import values by product (R millions)				Import value as % of import value		Cumulative %	
Total	8,761	8,130	7,721	9,636	-	-	-	-
Wheat (Other Than Durum Wheat), And Meslin	438	396	543	1,028	7%	11%	7%	11%

Soybean Oilcake & Oth Solid Residue, Wh/Not Ground	666	536	370	780	5%	8%	12%	19%
Palm Oil, Refined But Not Chemically Modified	699	407	446	622	6%	6%	18%	25%
Rice, Semi- Or Wholly Milled, Polished Etc Or Not	967	839	515	537	7%	6%	24%	31%
Whiskies	263	264	398	400	5%	4%	29%	35%
Chicken Cuts And Edible Offal (Inc Livers), Frozen	282	400	306	356	4%	4%	33%	39%
Soybean Oil, Refined, And Fractions, Not Modified	256	32	318	318	4%	3%	38%	42%
Food Preparations Nesoi	285	241	223	248	3%	3%	40%	45%
Meat & Offal Of Chickens, Not Cut In Pieces, Frozen	4	23	106	192	1%	2%	42%	47%
Tobacco, Partly Or Wholly Stemmed/Stripped	157	264	263	187	3%	2%	45%	48%

Source: South African Revenue Services

**Table A.8: Export values of fish and seafood by destination between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	<b>Export values by destination (R millions)</b>				<b>Export value as % of total export value</b>		<b>Cumulative %</b>	
Total	732	650	527	623	-	-	-	-
Spain	211	133	116	132	22%	21%	22%	21%
Italy	141	104	83	99	16%	16%	38%	37%
China	6	3	18	50	3%	8%	41%	45%
Hong Kong	49	76	54	48	10%	8%	51%	53%
United States	54	48	41	42	8%	7%	59%	60%
Cameroon	0	24	14	34	3%	5%	62%	65%
Portugal	44	33	14	29	3%	5%	65%	70%
Japan	47	43	21	22	4%	4%	69%	73%
Germany	0	15	15	21	3%	3%	71%	77%
Greece	24	13	11	17	2%	3%	73%	79%

Source: South African Revenue Services

**Table A.9: Export values of fish and seafood by product between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	<b>Export values by product (R millions)</b>				<b>Export value as % of total export value</b>		<b>Cumulative %</b>	

Total	732	650	527	623	-	-	-	-
Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine	199	117	103	117	20%	19%	20%	19%
Fish, Nesoi, With Bones, Frozen	58	81	79	84	15%	13%	35%	32%
Whiting & Hake, Except Fillets, Liver, Roe, Frozen	70	60	40	70	8%	11%	42%	43%
Lobsters, Live, Fresh, Ch, Dried, Salted Or In Brine	24	61	61	67	12%	11%	54%	54%
Rock Lobster And Other Sea Crawfish, Frozen	72	59	48	53	9%	9%	63%	63%

Source: South African Revenue Services

**Table A.10: Import values of fish and seafood by exporting country between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	Import values by exporting country (R millions)				Import value as % of import value		Cumulative %	
Total	329	413	346	259	-	-	-	-
Thailand	179	266	170	103	49%	40%	49%	40%
China	18	29	30	42	9%	16%	58%	56%
New Zealand	15	26	34	28	10%	11%	68%	67%
Norway	10	12	14	18	4%	7%	72%	74%
United States	5	3	5	10	1%	4%	73%	78%
India	4	8	7	7	2%	3%	75%	80%
Peru	27	4	9	5	3%	2%	78%	82%
Argentina	0	4	4	4	1%	2%	79%	84%
Uruguay	1	1	2	4	1%	2%	79%	85%
Taiwan	2	2	4	4	1%	2%	81%	87%

Source: South African Revenue Services

**Table A.11: Import values of fish and seafood by product between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	Import values by product (R millions)				Import value as % of import value		Cumulative %	
World	329	413	346	259	-	-	-	-
Sardines/Sardinella/Brisling Prep/Pres, Not Minced	112	214	126	60	36%	23%	36%	23%
Tunas/Skipjack/Bonito Prep/Pres Not Minced	77	60	49	51	14%	20%	51%	43%
Fish, Nesoi, With Bones, Frozen	20	32	41	34	12%	13%	62%	56%
Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine	38	22	44	33	13%	13%	75%	69%
Molluscs, Etc., Prepared Or Preserved	8	24	15	15	4%	6%	79%	75%

Source: South African Revenue Services

**Table A.12: Export values of forestry products by destination between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	Export values by destination (R millions)				Export value as % of total export value		Cumulative %	
Total	2 208	1 898	2 337	2 282	-	-	-	-
Indonesia	386	348	562	399	24%	17%	24%	17%
China	56	173	159	263	7%	12%	31%	29%
Thailand	126	87	167	152	7%	7%	38%	36%
United Kingdom	196	156	151	151	6%	7%	44%	42%
Zimbabwe	77	94	124	142	5%	6%	50%	49%
Germany	194	78	164	104	7%	5%	57%	53%

Korea South	22	38	74	92	3%	4%	60%	57%
Taiwan	56	88	32	91	1%	4%	61%	61%
Netherlands	32	57	62	80	3%	4%	64%	65%
Mozambique	56	80	73	79	3%	3%	67%	68%

Source: South African Revenue Services

**Table A.13: Export values of forestry by product between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	<b>Export values by product (R millions)</b>				<b>Export value as % of total export value</b>		<b>Cumulative %</b>	
World	2 208	1 898	2 337	2 282	-	-	-	-
Chemical Woodpulp, Dissolving Grades	1 021	694	1 104	1 129	47%	49%	47%	49%
Kraftliner, Uncoated, Bleached, In Rolls Or Sheets	273	260	346	357	15%	16%	62%	65%
Chem Woodpulp, Soda Etc, N Dis S Bl & Bl Nonconif	100	152	262	220	11%	10%	73%	75%
Newsprint, In Rolls Or Sheets	71	57	84	70	4%	3%	77%	78%
Cartons, Boxes & Cases Corrugated Paper & Paperbd	44	39	44	52	2%	2%	79%	80%

Source: South African Revenue Services

**Table A.14: Import values of forestry products by exporting country between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	<b>Import values by exporting country (R millions)</b>				<b>Import value as % of import value</b>		<b>Cumulative %</b>	
Total	1 833	1 461	1 473	1 587	-	-	-	-
China	156	159	208	220	14%	14%	14%	14%

United Kingdom	242	239	185	214	13%	13%	27%	27%
United States	210	214	189	195	13%	12%	40%	40%
Germany	175	156	117	148	8%	9%	47%	49%
Sweden	74	43	58	73	4%	5%	51%	54%
France	49	45	42	56	3%	4%	54%	57%
Brazil	37	54	39	53	3%	3%	57%	60%
Australia	27	36	22	48	1%	3%	58%	63%
Finland	80	46	39	48	3%	3%	61%	66%
Italy	52	27	34	45	2%	3%	63%	69%

Source: South African Revenue Services

**Table A.15: Import values of forestry by product between 2008 and 2011**

	2 <sup>nd</sup> Qtr 2008	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011
	Import values by product (R millions)				Import value as % of import value		Cumulative %	
Total	1 833	1 461	1 473	1 587	-	-	-	-
Printed Books, Brochures, Etc., Nesoi	356	299	273	300	19%	19%	19%	19%
Sanitary Napkins, Diapers & Sanit Art Of Paper Etc	329	197	164	184	11%	12%	30%	30%
Ppr/Pbrd Ex Lit-Wgh Writng Etc Clay Ctd Ov 10% Mec	127	75	83	76	6%	5%	35%	35%
Paper, Paperbd, Cellulose Wadd Etc, Coat Etc Nesoi	56	45	43	70	3%	4%	38%	40%
Chemical Woodpulp, Soda Etc. N Dis S BI & BI Conif	24	75	116	67	8%	4%	46%	44%

Source: South African Revenue Services



**Appendix B: Review of agricultural markets**

**Table B.1: Proxies of grain supply and consumption and grain prices**

	Apr 2010	May 2010	Jun 2010	2 <sup>nd</sup> Qtr 2010	Apr 2011	May 2011	Jun 2011	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011% change
	<b>Volumes (1000 tons)</b>								
White maize opening stock*	1 742	1 362	1 453	1 519	2 334	1 609	998	1 647	8%
Yellow maize opening stock*	1 028	769	1 022	940	918	727	753	799	-15%
Total maize opening stock*	2 770	2 131	2 475	2 459	3 252	2 336	1 751	2 446	-1%
White maize processed for local consumption	435	464	460	453	509	537	507	518	14%
Yellow maize processed for local consumption	255	271	281	269	192	213	258	221	-18%
Total maize processed for local consumption	690	735	741	722	701	750	765	739	2%
Total white maize exports	70	92	52	71	264	246	184	231	224%
Total yellow maize exports	67	10	12	30	21	67	25	38	27%
Total maize exports	137	102	64	101	285	313	209	269	166%
Wheat opening stock: human market*	1 528	1 443	1 295	1 422	1 223	1 083	962	1 089	-23%
Wheat opening stock: feed market*	14	12	10	12	13	12	10	12	-3%
Wheat opening stock*	1 542	1 455	1 305	1 434	1 236	1 095	972	1 101	-23%
Wheat consumption: human consumption	211	247	260	718	220	236	260	716	0%
Wheat consumption: animal feed	4	1	1	6	0	0	0	0	-100%
Total wheat consumption	217	251	263	731	223	239	263	725	-1%
Wheat imports (for human consumption only)	127	105	100	332	75	118	208	401	21%
Wheat exports	17	21	20	19	13	17	14	15	-24%
Average opening sunflower stock*	174	219	306	233	57	148	421	209	-10%
Sunflower seed imports	0.9	0	0.2	1.1	0	0	0	0	-100%
Total processed sunflower for consumption	65	66	56	187	37	63	67	167	-11%
Average soya bean opening stock*	48	182	381	204	49	155	512	239	17%
Soya bean consumption	34	43	36	113	53	44	37	134	19%
	<b>Market prices (R/ton)</b>								2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011% change
White maize	1 103	1 117	1 052	1 091	1 625	1 682	1 748	1 685	54%
Yellow maize	1 156	1 183	1 102	1 147	1 650	1 715	1 759	1 708	49%
Wheat	2 165	2 245	2 286	2 232	3 092	3 228	3 039	3 120	40%
Sunflower	3 298	3 429	3 384	3 370	3 959	3 972	4 071	4 001	19%
Soya bean	2 530	2 547	2 531	2 536	3 191	3 245	3 249	3 228	27%

\* Quarterly figures are reported in averages and where there is no asterix, quarterly figures are reported in totals  
Source: Sagis

**Table B.2: Prices of selected fruits traded at the FPM**

	Average prices at FPM (R/ton)			Percentage changes	
	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2009 to 2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011
Apples	3 877	4 002	4 243	3%	6%
Avocados	4 466	5 819	6 181	30%	6%
Bananas	4 068	3 614	4 095	-11%	13%
Oranges	1 571	1 662	1 767	6%	6%
Pears	3 736	3 679	4 120	-2%	12%
Mangoes	5 334	6 859	6 004	29%	-12%
Grapes	4 598	6 451	8 337	40%	29%

Source: DAFF

**Table B.3: Quantities of selected fruits traded at the FPM**

	Total quantities sold at FPM (1000 tons)			Percentage changes	
	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2009 to 2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011
Apples	39.7	41.6	41.6	5%	0%
Avocados	7.4	6.1	6.0	-18%	-1%
Bananas	47.9	55.0	53.6	15%	-3%
Oranges	56.6	58.5	54.4	3%	-7%
Pears	11.2	13.8	12.9	23%	-6%
Mangoes	0.4	0.7	0.3	105%	-54%
Grapes	6.5	5.7	6.5	-12%	14%

Source: DAFF

**Table B.4: Prices of selected vegetables traded at the FPM**

	Average prices at FPM (R/ton)			Percentage changes	
	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2009 to 2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011
Beetroot	3 278	3 021	2 672	-8%	-12%
Carrots	4 385	4 204	3 408	-4%	-19%
Cucumber	3 266	4 869	2 214	49%	-55%
Lettuce	2 432	3 927	5 365	61%	37%
Onions	4 190	3 513	2 821	-16%	-20%
Potatoes	2 881	2 590	2 469	-10%	-5%
Spinach	3 162	4 330	4 613	37%	7%
Tomatoes	3 853	5 462	5 004	42%	-8%
Cabbage	1 780	1 375	1 445	-23%	5%
Green beans	4 714	5 380	5 752	14%	7%
Sweet potatoes	1 810	1 705	2 208	-6%	30%

Source: DAFF

**Table B.5: Quantities of selected vegetables traded at the FPM**

	Total quantities sold at FPM (1000 tons)			Percentage changes	
	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2009 to 2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011
Beetroot	7.5	7.2	8.4	-5%	18%
Carrots	19.4	18.4	21.7	-5%	18%
Cucumber	0.2	0.1	0.1	-63%	71%
Lettuce	6.3	6.1	5.3	-4%	-13%
Onions	64.0	68.8	85.4	8%	24%
Potatoes	217.5	226.1	248.1	4%	10%
Spinach	3.0	2.2	2.0	-26%	-9%
Tomatoes	61.8	54.4	56.4	-12%	4%
Cabbage	26.4	27.7	28.1	5%	2%
Green beans	3.4	3.2	3.2	-4%	-1%
Sweet potatoes	8.5	9.1	7.8	7%	-14%

Source: DAFF

**Table B.6: Beef**

	Units	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2009 to 2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011
Gross value	R 'million	3 093	3 876	4 090	25%	6%
Average price	R/kg	22,49	23,64	25,94	5%	10%
Quantities	Heads	504 717	538 720	556 986	7%	3%

\*Heads refer to the number of cattle slaughtered

Source: DAFF

**Table B.7: Poultry**

	Units	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2009 to 2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011
Gross value	R 'million	6 004	6 096	6 463	2%	6%
Average price	R/Mt	17 303	16 570	17 450	-4%	5%
Commercial Production	Mt	331 795	352 545	354 808	6%	1%

Source: DAFF

**Table B.8: Eggs**

	Units	2 <sup>nd</sup> Qtr 2009	2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2011	2 <sup>nd</sup> Qtr 2009 to 2 <sup>nd</sup> Qtr 2010	2 <sup>nd</sup> Qtr 2010 to 2 <sup>nd</sup> Qtr 2011
Gross value	R 'million	1 692	1 639	1 696	-3%	3%
Average price	R/dozen	9,17	8,85	8,91	-3%	1%
Total Production	1000 dozen	184 499	185 132	190 382	0%	3%

Source: DAFF

**Table B.9: Milk**

	<b>Units</b>	<b>2<sup>nd</sup> Qtr 2009</b>	<b>2<sup>nd</sup> Qtr 2010</b>	<b>2<sup>nd</sup> Qtr 2011</b>	<b>2<sup>nd</sup> Qtr 2009 to 2<sup>nd</sup> Qtr 2010</b>	<b>2<sup>nd</sup> Qtr 2010 to 2<sup>nd</sup> Qtr 2011</b>
Gross value	R 'million	2 029	2 203	2 041	9%	-7%
Average price received by farmers	R/litre	3,02	3,10	2,89	3%	-7%
Total Production	1000 litre	672 769	710 760	705 528	6%	-1%

Source:

DAFF

**Appendix C: Descriptions of forestry import and export products****Table C.1: Descriptions of forestry import and export products****Export products descriptions**

**Fuel In Log;Chips,etc.:** Fuel wood, in logs, in billets, in twigs, in faggots or in similar forms; wood in chips or particles; sawdust and wood waste and scrap, whether or not agglomerated in logs, briquettes, pellets or similar forms

Fuel wood, wood in chips and sawdust and wood waste

**Wood Charcoal:** Wood charcoal (including shell or nut charcoal), whether or not agglomerated

**Blders' Joinry+Carpntr:** Builders and apos; joinery and carpentry of wood, including cellular wood panels, assembled parquet panels, shingles and shakes

**Fibrbrd Of Wd/Ot Lign:** Fibreboard of wood or other ligneous materials, whether or not bonded with resins or other organic substances

**Rough,Not Sapwood:** Wood in the rough, whether or not stripped of bark or sapwood, or roughly squared

**Import product descriptions**

**Lumber > 6 mm thick:** Wood sawn or chipped length-wise, sliced or peeled, whether or not planed, sanded or end-jointed, of a thickness exceeding 6 mm

**Cask,Barr,Vat,etc.+Pts:** Casks, barrels, vats, tubs and other coopers and apos; products and parts thereof, of wood, including staves

**Fibrbrd Of Wd/Ot Lign:** Fibreboard of wood or other ligneous materials, whether or not bonded with resins or other organic substances

**Plywood,Veneer,etc.:** Plywood, veneered panels and similar laminated wood

**Blders' Joinry+Carpntr:** Builders and apos; joinery and carpentry of wood, including cellular wood panels, assembled parquet panels, shingles and shakes