

# A PROFILE OF THE SOUTH AFRICAN PORK MARKET VALUE CHAIN

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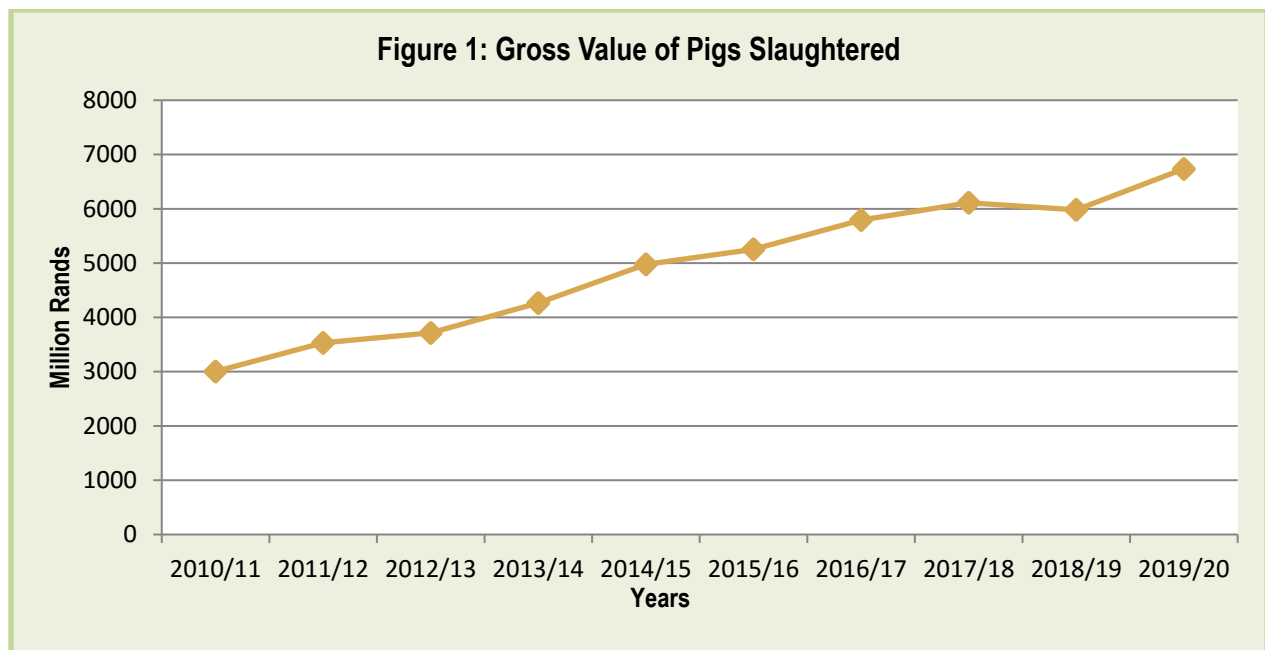
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## TABLE OF CONTENTS

<b>1. DESCRIPTION OF THE INDUSTRY .....</b>	<b>3</b>
1.1 Production areas.....	3
1.2. Production trends.....	4
1.3. Local consumption.....	5
1.3. Employment.....	6
<b>2. MARKET STRUCTURE .....</b>	<b>6</b>
2.1. Domestic market.....	6
2.2. Import-export analysis .....	7
2.3 South African export and import analysis .....	7
2.2.1. Exports for pork .....	7
2.2.3. Imports .....	18
<b>3. MARKETING CHANNELS / VALUE CHAIN.....</b>	<b>22</b>
<b>4. OPPORUNITIES AND CHALLENGES .....</b>	<b>24</b>
<b>5. STRENGTHS AND WEAKNESSES .....</b>	<b>24</b>
<b>6. MARKET INTELLIGENCE .....</b>	<b>25</b>
6.1. Export tariffs .....	25
6.2. Import tariffs.....	26
<b>7. PERFORMANCE ANALYSIS OF SOUTH AFRICAN PORK INDUSTRY IN 2020 .....</b>	<b>27</b>
7.1. Exports .....	27
7.2. Imports.....	33
<b>8. ACKNOWLEDGEMENTS .....</b>	<b>39</b>

## 1. DESCRIPTION OF THE INDUSTRY

Pork is one of the smallest industries in terms of overall South African agricultural sector. It contributes around 2.2% to the primary agricultural sector. Figure 1 below shows the gross value of pigs slaughtered for the past decade. The gross value of production of pork is dependent on the quantity produced and the price received by farmers. The trend in gross value follows a pattern of prices since the industry is characterized by volatile prices. The average gross value of pigs slaughtered over the past 10 years amounted to R4.9 billion per annum. The contribution of pork to the gross value of agricultural production increased steadily from 2010/11 to 2017/18. In 2018/19, gross value of pork experience a slight decrease of 2% emanating from listeriosis outbreak during 2018. In 2019/20, the gross value have increased by 12%.

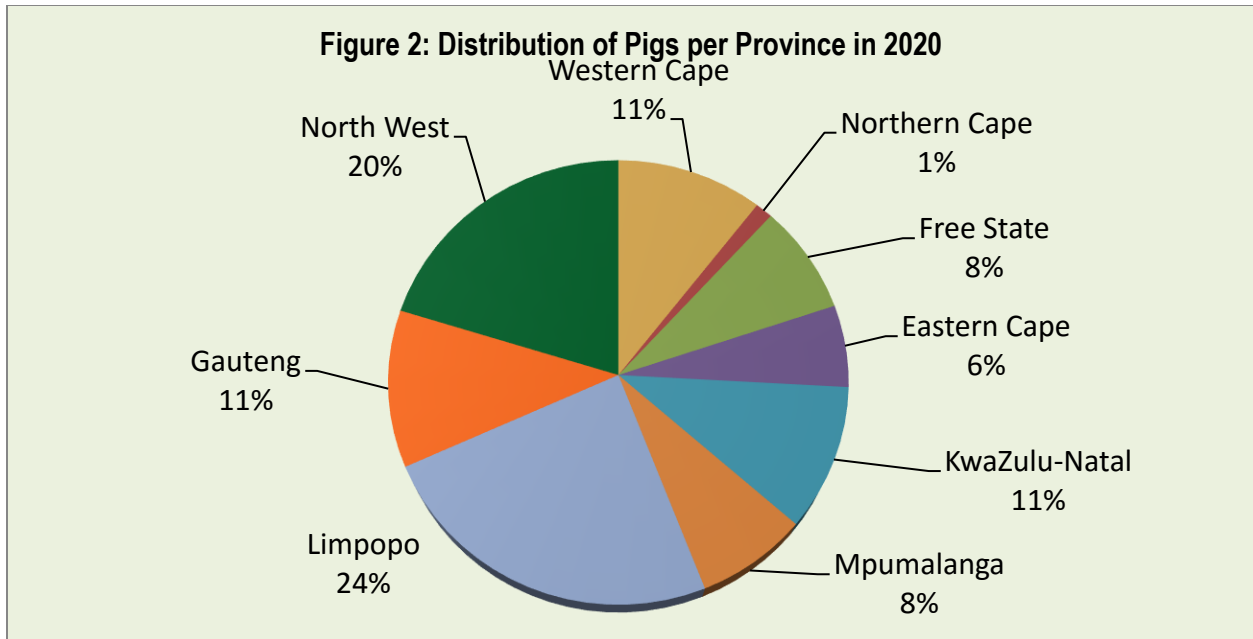


Source: *Statistics and Economic Analysis, DALRRD*

### 1.1 Production areas

Pig numbers are estimated at 1.357 million for the year 2020; this is a decrease of 2.3% compared to 2019. Noteworthy is the fact that the pig numbers in South Africa has been decreasing for the previous few years, this may be due to the fact that the consumption of pork meat is increasing rapidly.

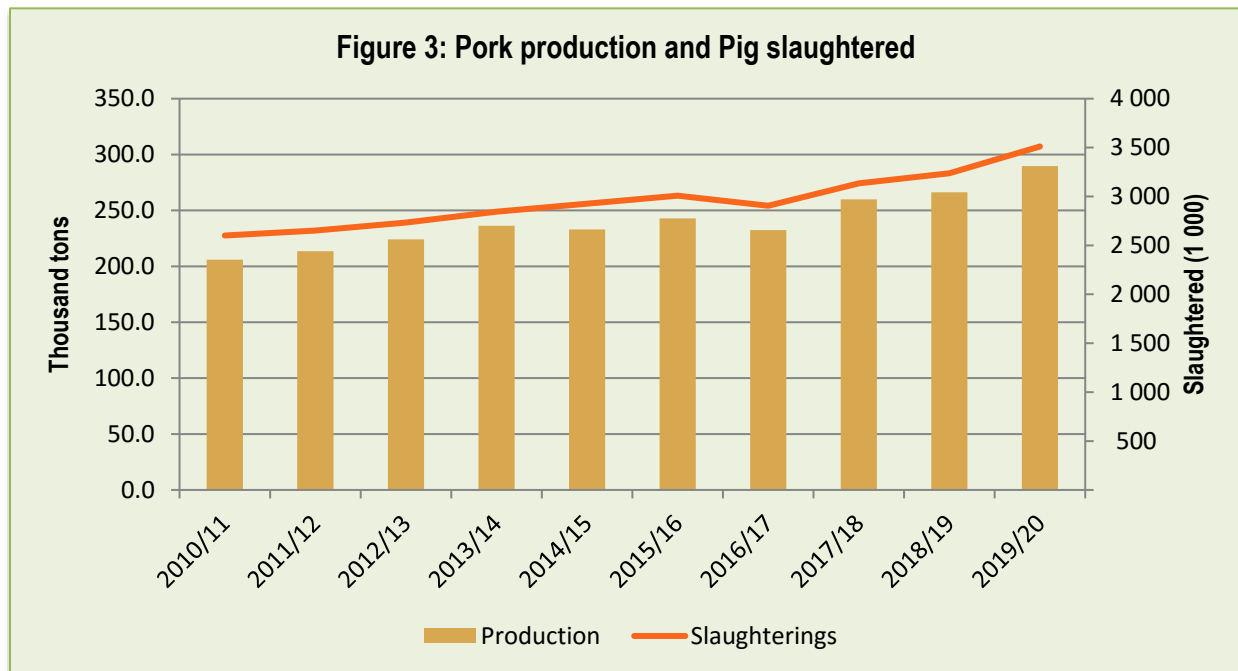
Pork is produced throughout South Africa, however the area where pork is produced is not necessarily where the animals are populated. Figure 2 below shows the number of pigs' population per province during year 2020. The figure clearly shows that Limpopo and North West provinces were the largest producers accounting for 24% and 20% respectively. Western Cape, KwaZulu-Natal and Gauteng followed with a share of 11% each. The province with lowest pig numbers is Northern Cape with 1% share.



Source: Statistics and Economic Analysis, DALRRD

### 1.2. Production trends

During the past decade, approximately 29.5 million pigs were slaughtered yielding more than 2.4 million tons of pork meat. On average, 2.9 million pigs were slaughtered and produced an average of 240 000 tons per year for the period under analysis. Figure 3 below shows the production trend in relation to number of pigs slaughtered for the past decade.

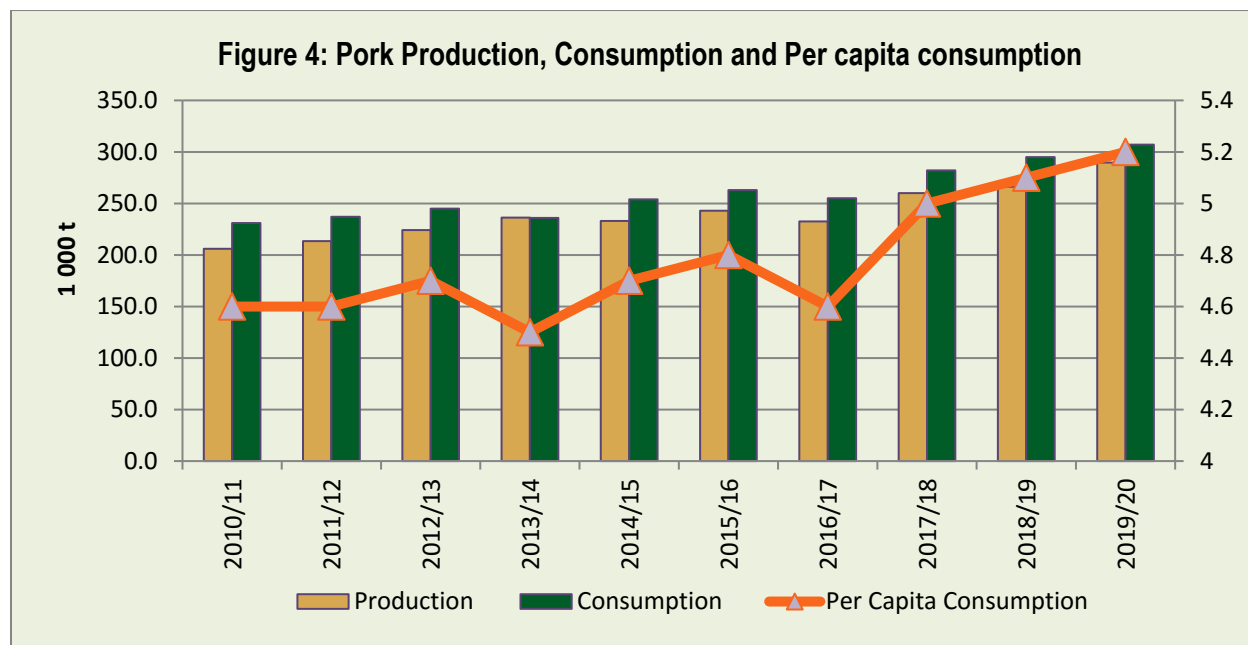


Source: Statistics and Economic Analysis, DALRRD

With the response to the increasing consumption and/or demand for pork products, the pork production has been increasing over the past decade so has the number of pigs slaughtered. However, both production and slaughtering have experienced the slight decrease of 4% and 3% respectively in 2016/17. The decline in 2016/17 has been attributed to drought in 2015/2016 period. Overall, pork production and slaughtering showed an increasing trend from 2010/11 to 2019/20 with the exception of 2016/17. This shows that there may be improvements on the pork production efficiency.

### 1.3. Local consumption

Pork is the most consumed products globally whilst South African consumption is the lowest as compared to poultry and beef consumption. Pork consumption is influenced by the religious and cultural beliefs in the country. Figure 4 below depicts local consumption of pork comparing it to the total production for the past decade.



Source: Statistics and Economic Analysis, DALRRD

It is clear from Figure 4 that South Africa consumes more than they produce which makes the country self-insufficient in pork production. This has been the case for the past decade excluding 2013/14. During 2013/14, South Africa was self-sufficient by producing 236 300 tons which became more than the consumption of 236 000 tons and consumption had slightly decreased during the period of 2013/14. This may be due to high price of pork meat, which made it relatively expensive to its substitutes such as poultry and beef. From 2014/15 to 2018/19, the situation returned to its nature where the consumption outstripped the production. This had caused South Africa to import pork to meet local demand. The per capita consumption has shown an increasing trend from 2010/11 to 2019/20 except in 2013/14 and 2016/17, which is in line with the decrease in consumption. The increased per capita consumption may be due to the increasingly urbanised consumers with the increased per capita income and the well-marketed rib portion consumption.

### 1.3. Employment

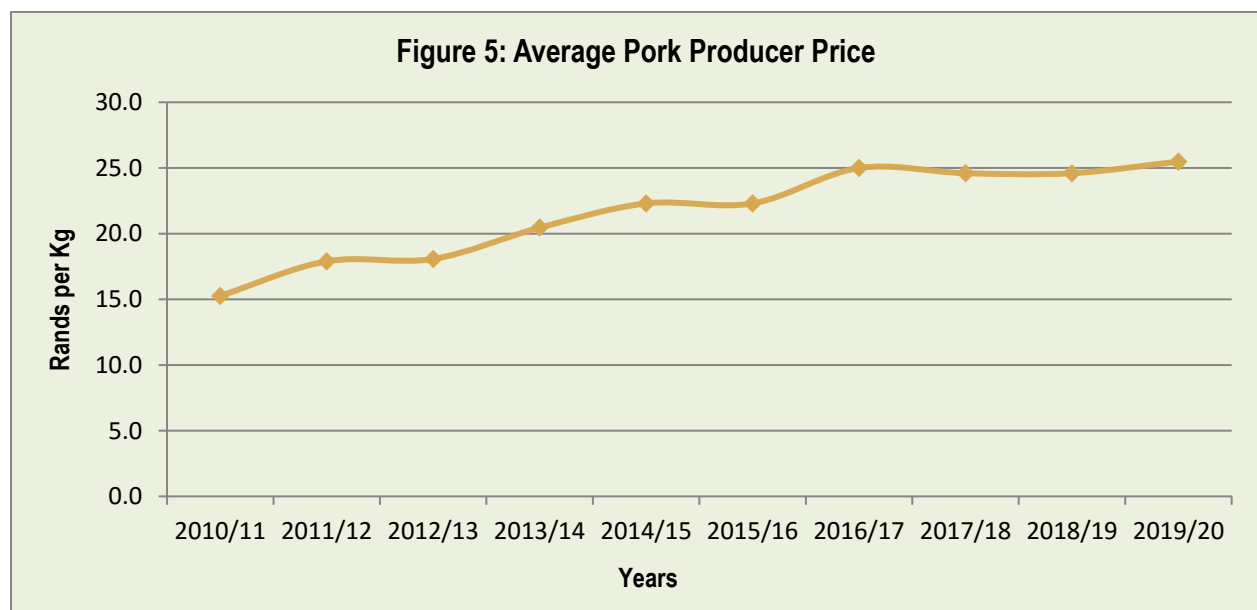
Commercial pig farmers are estimated at 156, stud farmers at 19 and smallholder farmers at 365. The total number of sows is estimated at 136 000 sows. The industry is estimated to employ about 3 105 workers, comprising of about 2 300 at farm level and 845 workers in the processing and abattoir sectors.

## 2. MARKET STRUCTURE

### 2.1. Domestic market

The pork industry evolved from a highly regulated environment to one that is completely deregulated today. Since the deregulation of the agricultural marketing dispensation in 1997, demand and supply forces determine the prices in the red meat industry. The local market for pork is split into the fresh meat market and the processing meat market, where 45% goes to fresh market and about 55% goes to processing meat market.

Average producer prices of pork from 2010/11 to 2019/20 are illustrated in Figure 5.

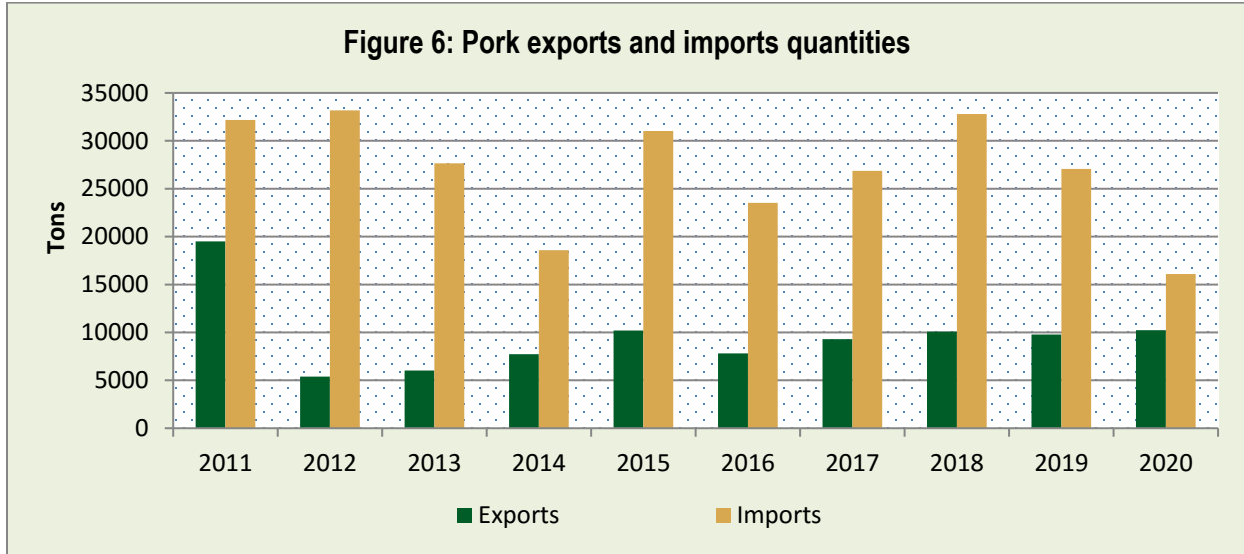


Source: Statistics and Economic Analysis, DALRRD

The price of pork in South Africa is vulnerable to international markets and price shifts of beef or chicken as main substitutes. The average producer price of pork has shown an overall increasing trend for the period under consideration. However, there was a slight decline of 1.5% of producer prices in 2017/18 that was pressured by oversupply of pork and pork products. The prices remained flat in 2018/19, the price stability was exacerbated by the listeriosis outbreak that reduced demand. The price have reached a new peak of R25.48 in 2019/20 and the lowest price of R15.3/kg was experienced in 2010/11. For the past ten years, the pork producer price increased by R10.21/ Kg, thus 67%.

## 2.2. Import-export analysis

South Africa's pork imports are predominantly pork ribs while exports are composed of fresh or chilled meat. Figure 6 below, compares volumes of imports and exports for pork from 2011 to 2020.



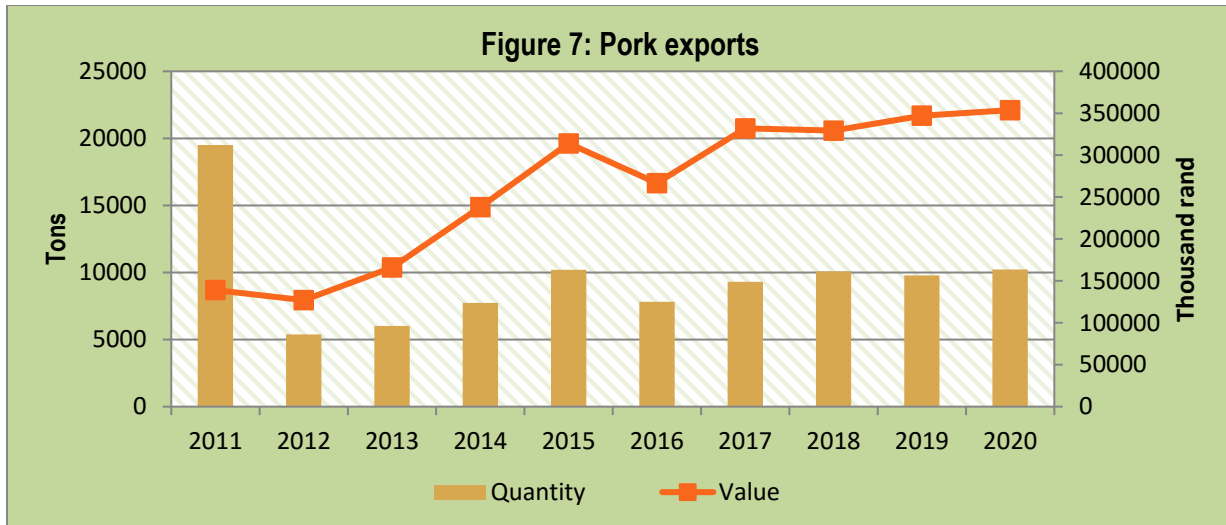
Source: Quantec

Figure 6 indicates that from 2011 to 2020, South Africa's pork exports were far less than the imports. This also confirms that South Africa relies on imports to satisfy the local demand of pork. The exports were minimal throughout the period under analysis, except in 2011 where exports reached almost 20 000 tons. Both Import and export trends were fluctuating during the period under review. However, from 2012 to 2014 the imports are showing a steady decrease whilst exports are increasing. From 2015 to 2019, imports and exports are moving in the same trend. They both declined by 17% and 3% respectively from 2018 to 2019. During the period under review, imports of pork meat reached its peak in 2012 and trough in 2014. In 2020, exports increased by 4% and imports significantly declined by 40%, this is in conjunction with the increasing levels of production and consumption.

## 2.3 South African export and import analysis

### 2.2.1. Exports for pork

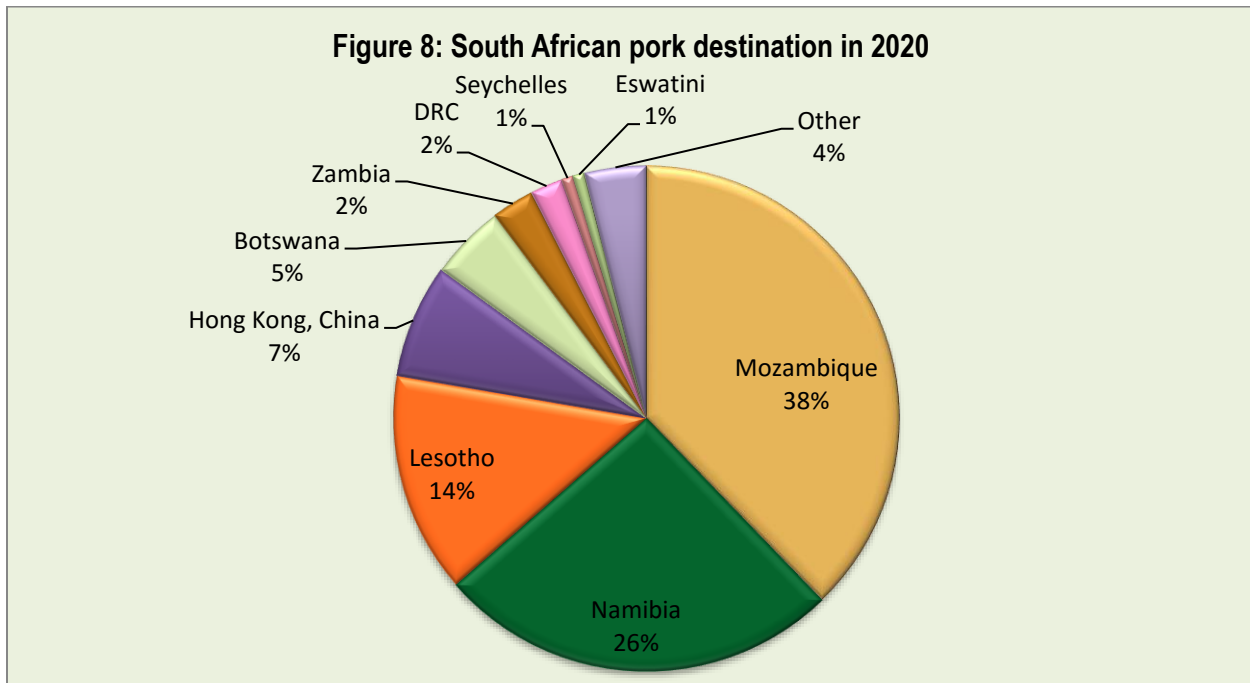
Despite the fact that South Africa is a net importer of pork, there are other pork products that are exported. South Africa exported approximately 96 064 tons of pork from 2011 to 2020, yielding an export value of approximately R 2.7 billion over the same period. The quantity and the value for exports of pork are shown in Figure 7 below.



Source: Quantec

Figure 7 indicates that exports value of pork was slightly fluctuating at an increasing trend from 2011 to 2020. From the period of 2012 to 2015, the value of exports showed a steady increase, which indicates the worth to export pork meat in this period, followed by a slight decrease in 2016. According to Figure 7, it is clear that quantity of pork exports remained lower over the past decade excluding the year 2011, which displayed outlier at approximately 20 000 tons. In 2020, the export quantity increased by 4% while the value also shown an increase of 2%. On average, South Africa exports over 9 606 tons per annum in past decade, with the exclusion of 2011.

Figure 8 below represent the South African pork destination in 2020.

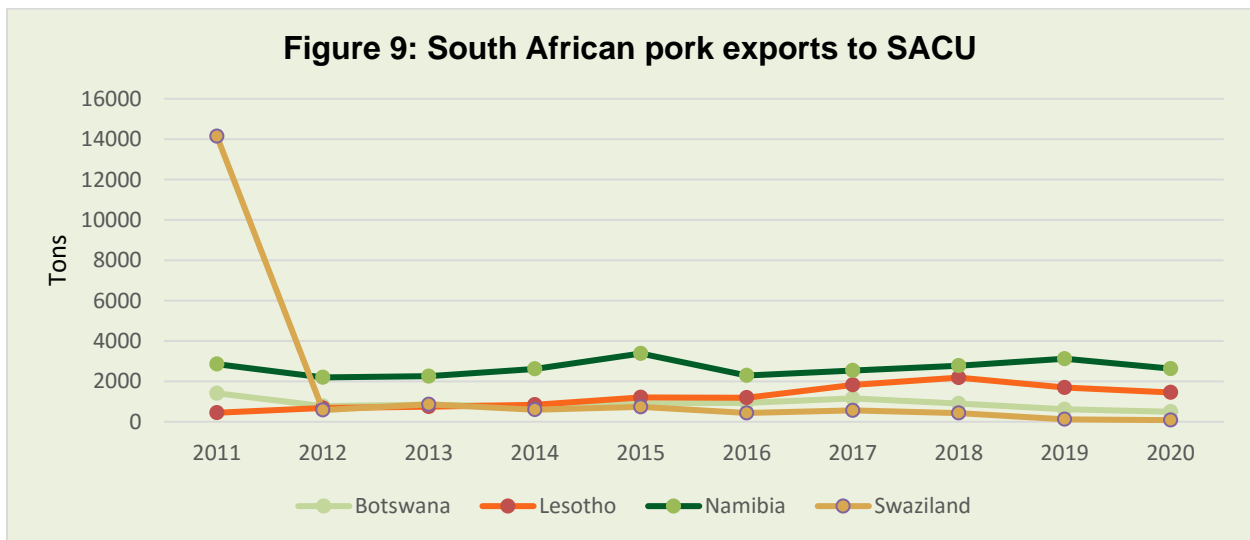


Source: Trade Map



South African pork exports represent approximately 4% of local production. It is noted that South African pork is mainly exported to SADC countries, which constitutes about 90% of the total pork exports. In 2020, Mozambique was the biggest export market with a share of 38% followed by Namibia with 26%, Lesotho with 14%, Hong Kong, China and Botswana with 7% and 5% respectively.

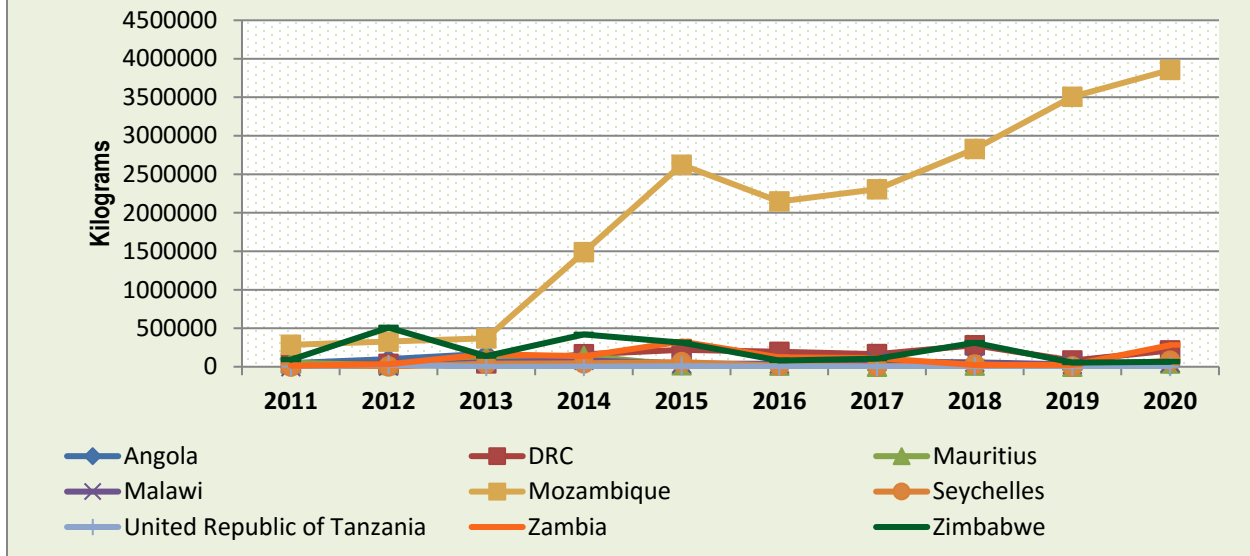
Approximately 90% of South African pork exports goes to Southern African Development Community (SADC) countries. Since 2010, data has been separated between SACU members and SADC (excluding SACU) members. SACU members account for more than half of the total pork exported to all SADC countries. The products exported are mainly fresh or chilled pork meat, in a form of carcass and half carcasses. Figure 9 and Figure 10 presents volumes of pork exports to SACU and SADC (Excluding SACU) for the past ten years.



Source: Quantec

According to Figure 9 above, Namibia have dominated the export market for South Africa within SACU except 2011. Swaziland led the market with a share of 75% in 2011, then Namibia took a lead for the rest of the analysed period. For the past ten years in total, Namibia has led by taking up a share of 40% followed by Swaziland with 28% then Lesotho and Botswana accounted for 19% and 13% respectively.

**Figure 10: South African pork exports to SADC (Excl SACU)**

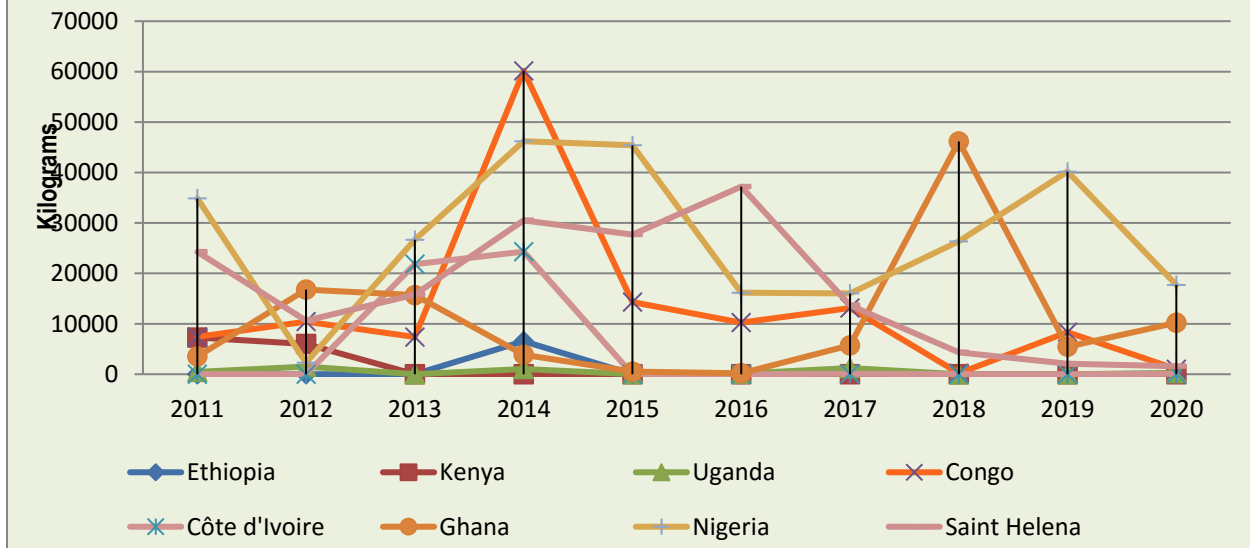


Source: Quantec

As indicated above, South African pork exports mainly goes to SADC countries. In exclusion of SACU members, Mozambique was the top pork export market within SADC while the rest were fairly low. In total, Mozambique demanded the greatest share (75%) of pork exported by South Africa during the period under analysis followed by Zimbabwe at a distance with a share of 8%. Tanzania and Seychelles recorded the lowest shares of South Africa pork exports during the period under review. During 2020, Mozambique remained the biggest market for South African pork exports to SADC with a share of 84%.

Figure 11 below present South African pork export to Middle, Western and Eastern Africa from 2011 to 2020.

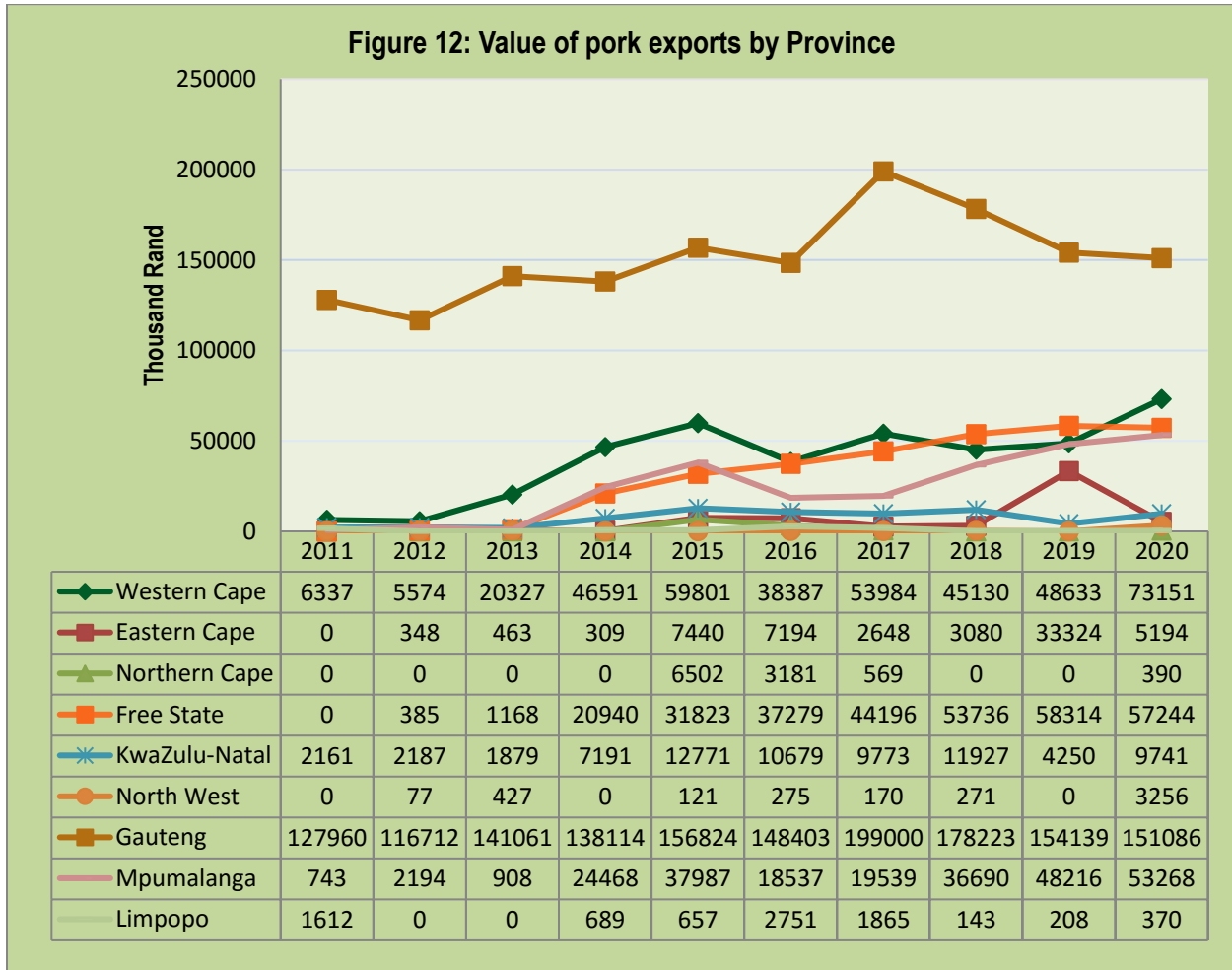
**Figure 11: Pork exports to Middle, Western and Eastern Africa**



Source: Quantec

Figure 11, displays that South Africa's pork exports to Middle, Western and Eastern Africa was fluctuating during the past decade. In total, Nigeria demanded the greatest share (36%) of South African pork for the past ten years followed at a distance by Saint Helena (22%) and Congo (18%). Ethiopia and Uganda was the smallest importer of South African pork with a share of 1% each. In total, all the countries within this region, their pork intake had decreased by 45% from 2019 to 2020. This was influenced by tremendous decrease of Nigeria intake of 56%.

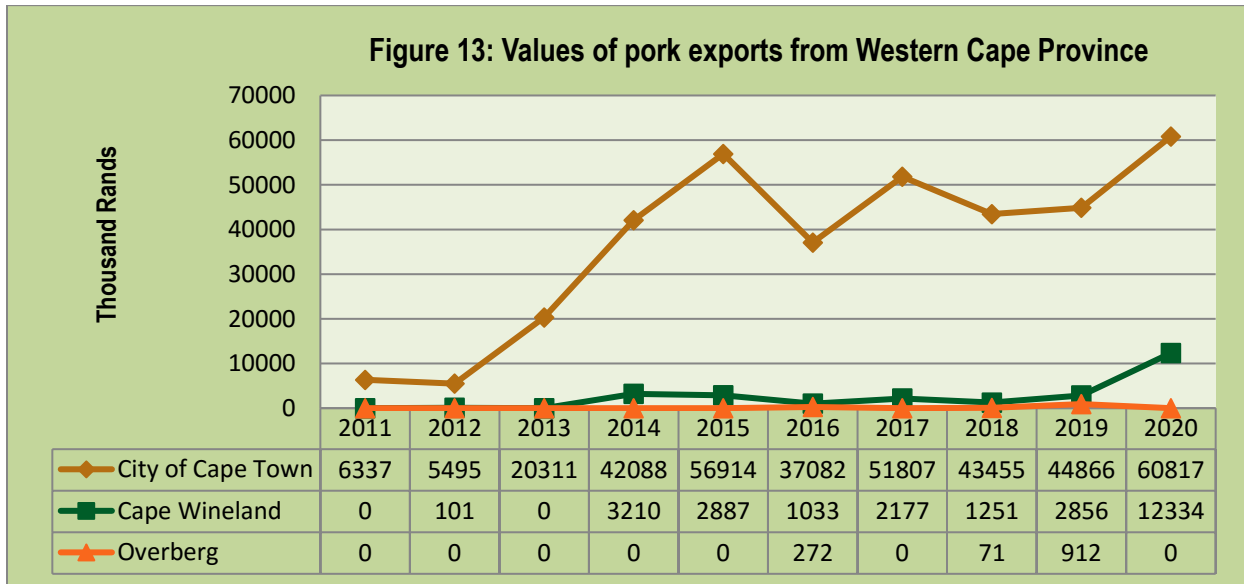
Values of pork exports from various provinces of South Africa are presented in Figure 12.



Source: Quantec

Gauteng Province dominated pork exports for the entire period under consideration. Western Cape Provinces followed Gauteng at a distance. This is because these provinces are main exit points for exports in South Africa and due to infrastructure developments that facilitate trade. The province reached its peak in 2017 with a record of R199 million. Western Cape shows immense increase of its exports of pork from 2012 to 2015. With the total exports of pork from the country, Gauteng has an export share of 58% followed by Western Cape and Free State with 15% and 12% respectively. Other provinces such as Limpopo, Eastern Cape, Northern Cape and North West are presenting a small contribution to the total exports of pork meat.

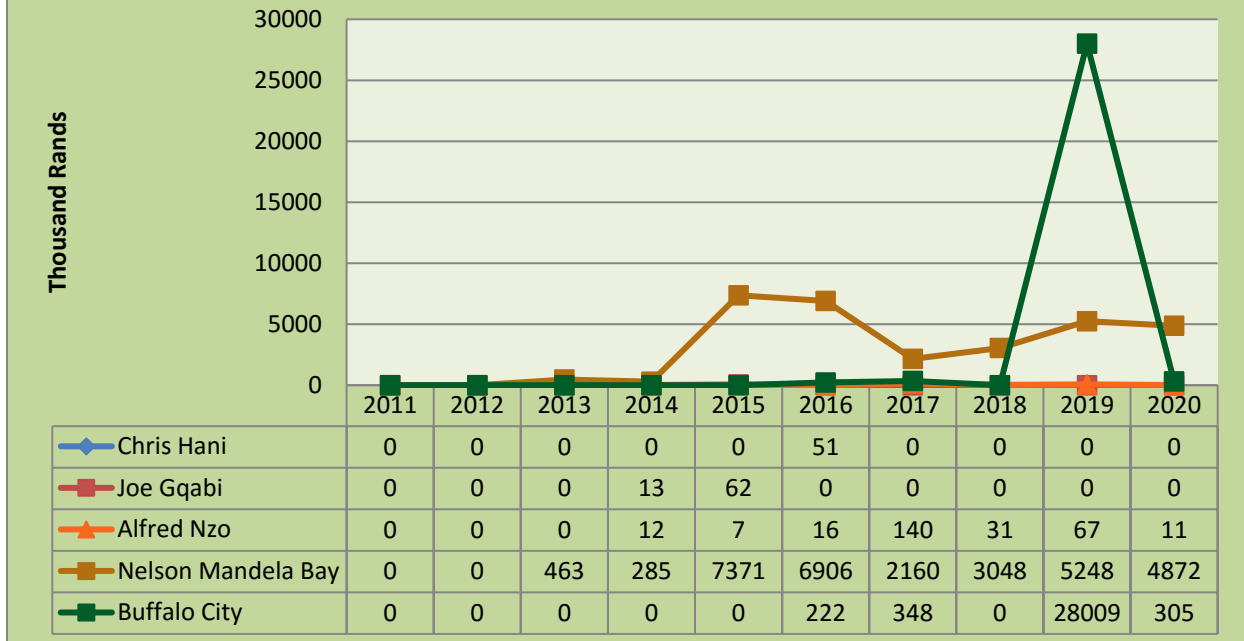
The following figures (Figures 13 - 21) show the value of pork exports from the various districts of 9 (nine) Provinces of South Africa.



Source: Quantec

Figure 13 indicates that City of Cape Town Metropolitan Municipality were a biggest exporter during the past decade and experienced sharp increases from 2012 to 2015. The export market dominance might be due to the fact that City of Cape Town is the main exit point for exports in the Western Cape. Overberg District Municipality recorded exports only in 2016, 2018 and 2019. Cape Winelands indicated its irregular export of pork during the period under review. However, in 2020, the district has reached the new peak by increasing exports by 332%. City of Cape Town have recorded a 100% share of exports in 2011 and 2013. The district further recorded over 90% export shares for the other years. This clearly shows that City of Cape Town is the main exporter within the Province.

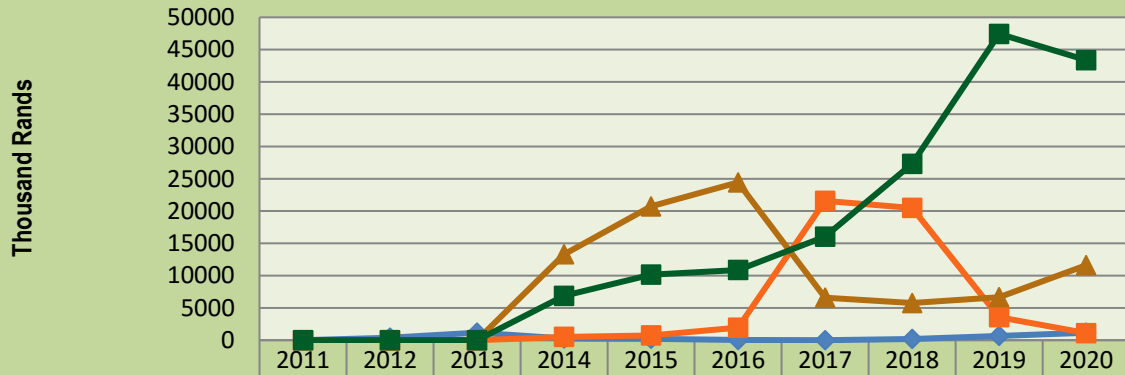
**Figure 14: Value of pork exports from Eastern Cape Province**



Source: Quantec

From Eastern Cape Province, there were no records of pork exports during the period from 2011 to 2012. Nelson Mandela District Municipality recorded exports from 2013 to 2020, which was the highest exports from the Province except in 2019 where Buffalo City took a lead. Other District Municipalities such as Chris Hani, Alfred Nzo, Joe Gqabi and Buffalo City presented low exports. Nelson Mandela Bay District Municipality took a lead by exporting a share of more than 90% from 2013 to 2016. In 2019, Buffalo City outstripped Nelson Mandela Bay and recorded the highest pork exports with the province and accounted for 84% of total exports from the province. Buffalo City pork exports declined drastically in 2020 leading to a huge total exports decrease of the province.

**Figure 15: Values of pork exports from Free State Province**

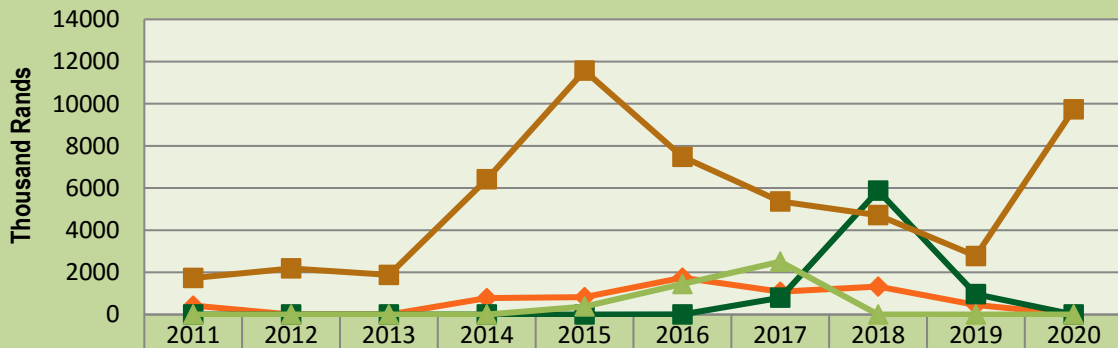


	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Xhariep	0	385	1168	262	216	29	0	188	662	1164
Lejweleputswa	0	0	0	515	737	1937	21575	20482	3561	1101
Thabo Mofutsanyane	0	0	0	13294	20720	24438	6583	5755	6655	11612
Mangaung	0	0	0	6870	10150	10876	16037	27311	47435	43366

Source: Quantec

From Free State Province, all district municipalities have recorded intermittent pork exports during the period under analysis. In 2011, the province did not export pork. Xhariep District Municipality recorded its exports from 2012 to 2016 and again in 2018 to 2020. Thabo Mofutsanyane, Lejweleputswa and Mangaung District Municipalities recorded exports of pork from 2014 to 2020. During 2017, Thabo Mofutsanyane's pork exports declined by 73% from the previous year and remained flat until 2019. Mangaung have shown increasing trend since its inception of exports in 2014 to 2019. This district shot up exports by 74% in 2019 followed by a slight decrease of 8% in 2020. The overall pork exports from the province have declined by 2% in 2020.

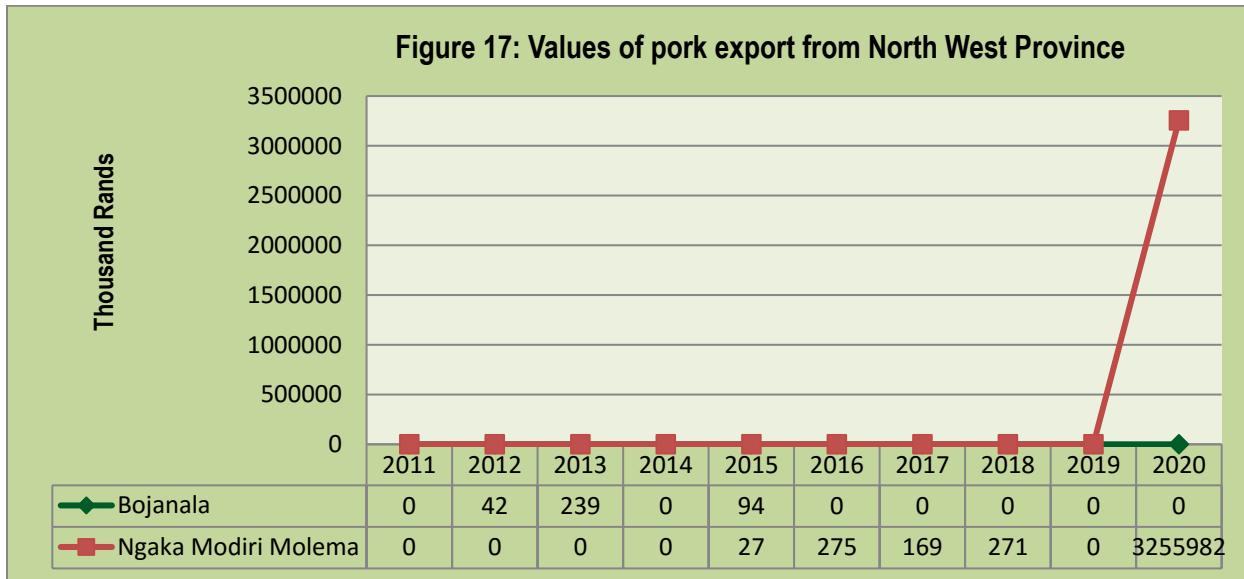
**Figure 16: Values of Pork exports from KwaZulu Natal Province**



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Uthukela	423	0	0	779	823	1746	1084	1324	453	0
Umzinyathi	0	0	0	0	0	3	799	5874	966	0
iLembe	0	0	0	0	380	1447	2507	0	0	0
eThekweni	1731	2187	1879	6413	11567	7482	5363	4716	2774	9735

Source: Quantec

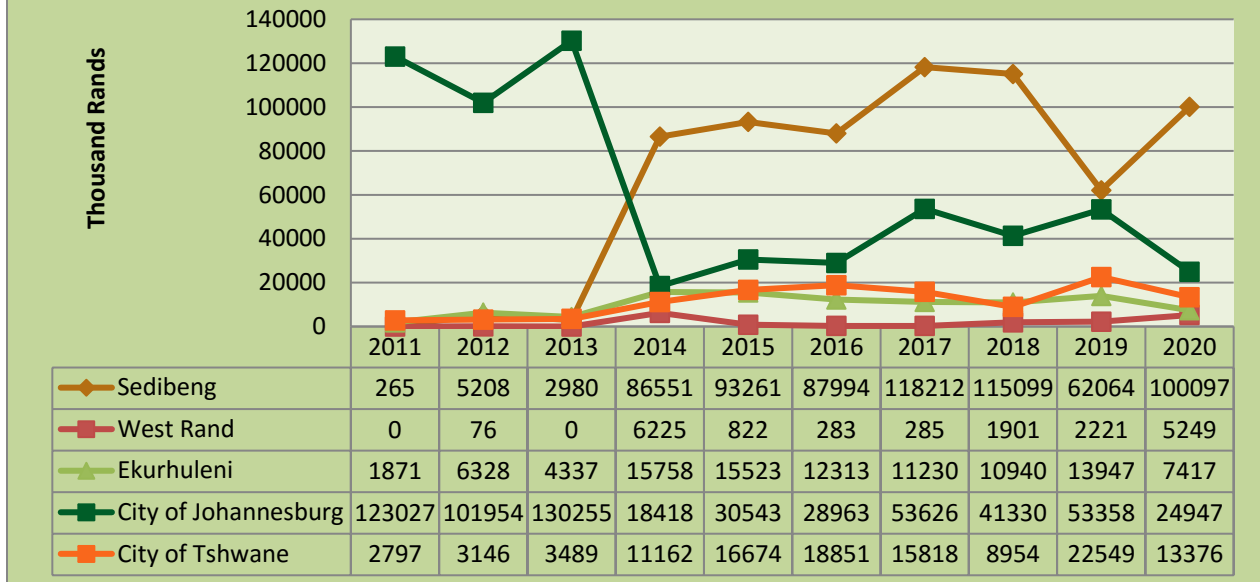
Exports of pork from KwaZulu-Natal occurred mainly in eThekweni District Municipality. UThukela, Umzinyathi and iLembe District Municipalities has shown irregular pork exports during the period under analysis. ILembe District Municipality exported pork from 2015 to 2017 for the past ten years. EThekweni District Municipality dominated the export with the highest values recorded in 2010 and 2015. This is because eThekweni District is the main exit point in KwaZulu–Natal Province for exports. eThekweni had had shown a declining trend from 2015 to 2019, followed by an immense increase of 251% in 2020. Umzinyathi is the lowest exporter of pork meat, however in 2018; its exports went up by 635% and became the leading exporter.



Source: Quantec

From North West Province, District Municipalities have recorded irregular exports for pork during the period under analysis. There were no export recorded in 2011, 2014 and 2019. Bojanala District Municipality recorded exports of pork during 2012, 2013 and 2015. In 2015, Bojanala and Ngaka Modiri Molema had 78% and 22% share respectively. Ngaka Modiri Molema recorded exports from 2015 to 2018 and 2020. In 2020, this district municipality reached a new peak with a record of R3.2 million.

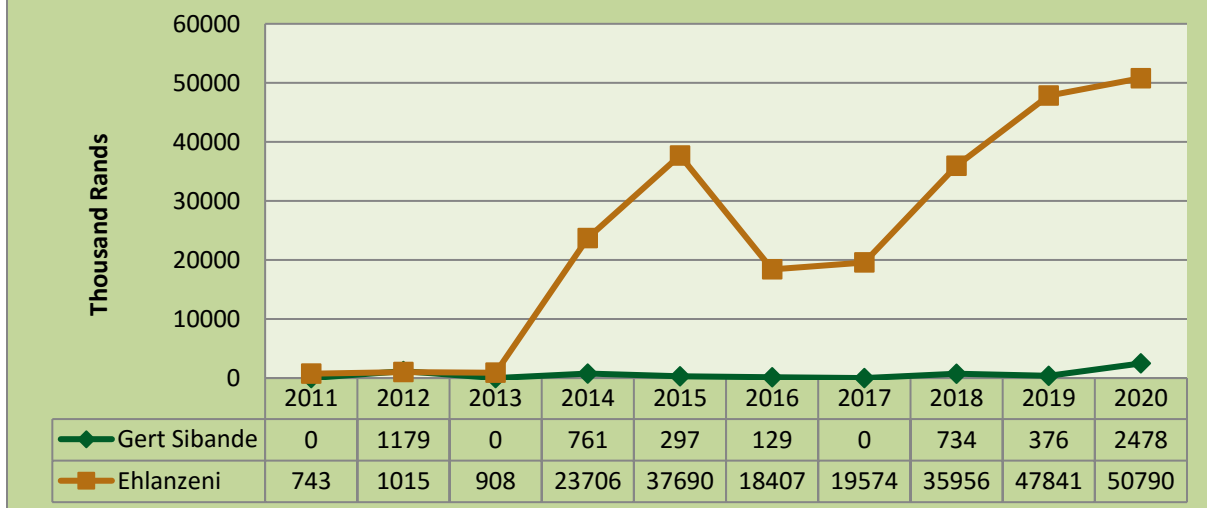
**Figure 18: Values of pork export from Gauteng Province**



Source: Quantec

From Gauteng Province, highest pork exports occurred mainly in City of Johannesburg and Sedibeng District Municipalities. City of Johannesburg recorded the highest exports during the period 2011 to 2013 with an export share of over 80%. However, in 2014 there was decline of 85%. Noteworthy is the fact that City of Johannesburg is one of the main exit point for exports in South Africa. Sedibeng District Municipality took the highest position from 2014 to 2020. The municipality reached new peak in 2017 at a value of R118 million. These records made Sedibeng District Municipality to be the leading exporter during the past decade followed City of Johannesburg Metropolitan Municipality. From 2014 to 2018, Sedibeng recorded the highest share of approximately 60% of total exports from the province. The decline in 2019 led the Sedibeng district with a share of 40%. The overall exports from the province have decreased by 2% in 2020 from the previous year.

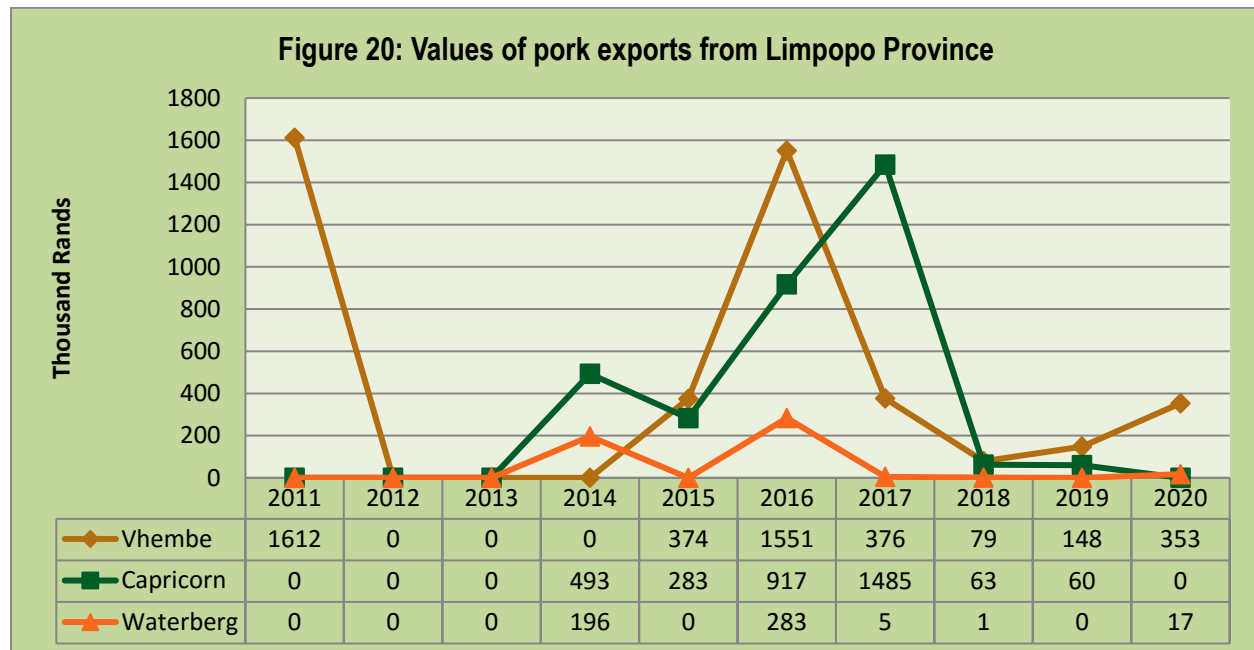
**Figure 19: Values of pork export from Mpumalanga**



Source: Quantec

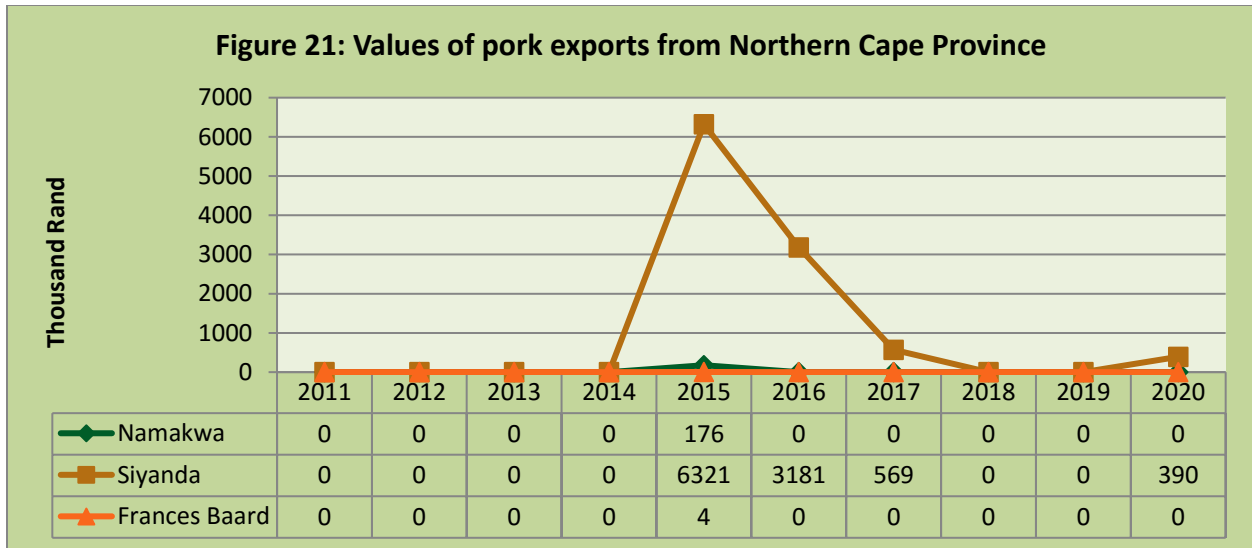


Figure 19 shows that the District Municipalities in Mpumalanga Province that participated in pork exports during the past decade were Ehlanzeni and Gert Sibande. However, Ehlanzeni District Municipality dominated the export market within the Province. In 2016, Ehlanzeni recorded pork exports worth more than R18 million which is a decrease from R37.7 million (51%) from previous year. However, the municipality started increasing until 2020. Gert Sibande District Municipality recorded irregular exports during the past decade. On average, Ehlanzeni is the highest exporter of pork meat however Gert Sibande was a leading exporter in 2012 with an export share 54%.



Source: Quantec

Limpopo Province is one of the lowest exporter of pork meat. Figure 20 shows the export trend for the past decade. Vhembe, Capricorn and Waterberg District Municipalities have recorded irregular exports in the period under review. The province highest exports was recorded in 2011 through Vhembe District Municipality reaching R1.6 million. In 2017, Capricorn increased exports by 62% and followed by a drastic decline of 96% in 2018. The total pork exports from the province declined in 2018 and remained flat in 2019. In 2020, Vhembe accounted for 95% followed by Waterberg with 5% share. There were no pork exports from Limpopo Province in 2012 and 2013.

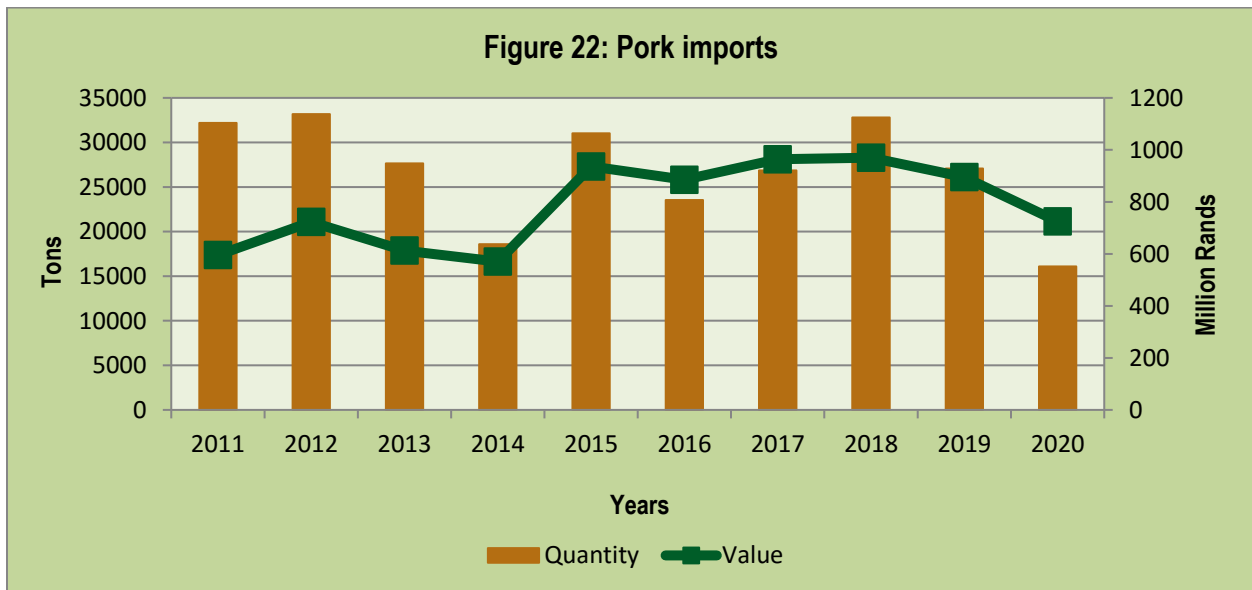


Source: Quantec,

From Northern Cape Province, Siyanda District Municipality recorded pork export from 2015 to 2017 and 2020. Namakwa and Francis Baard District Municipalities recorded only in 2015. Siyanda District Municipality had a share of 97% of pork export from the province in 2015, followed by Namakwa and Frances Baard District Municipalities with 2.7% and 0.1% respectively. Siyanda shows a massive decline of pork export from R6.3 million in 2015 to R569 000 in 2017. However, this District Municipality had a share of 100% in both 2016 and 2017 respectively. From 2011 to 2014 and again from 2018 to 2019, the province did not export pork meat.

### 2.2.3. Imports

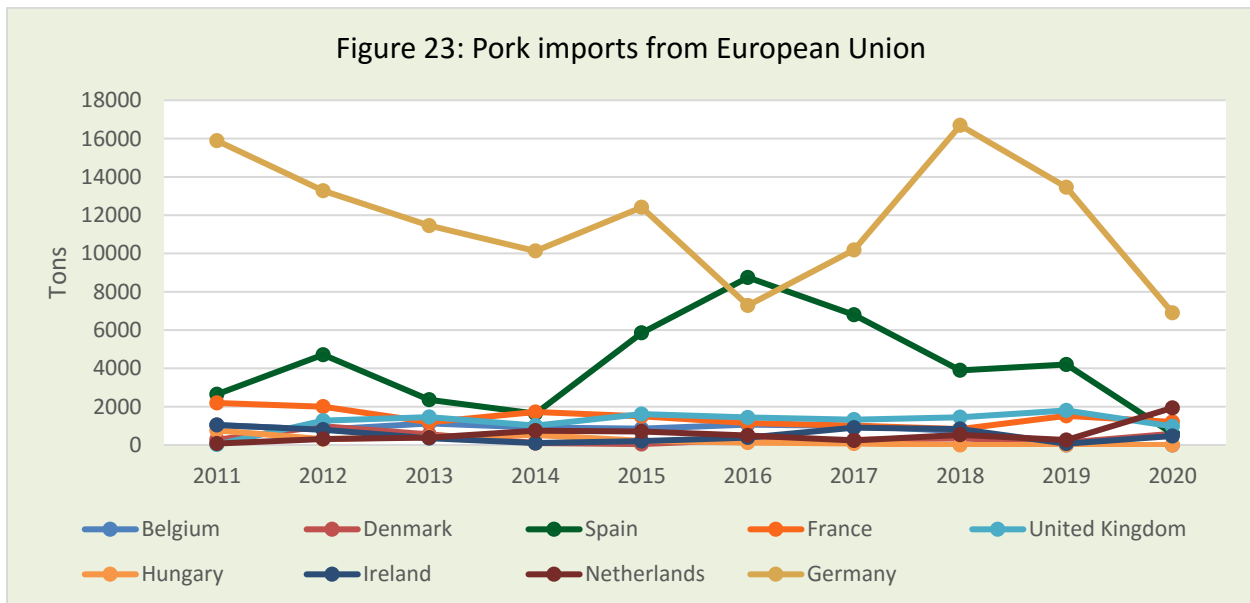
South Africa imported approximately 16 091 tons of pork in 2020 at an estimated value of R725 million. Figure 22 below show the imports of pork from 2011 to 2020.



Source: Quantec

Figure 22 shows that pork imports (quantity & value) have been fluctuating in the past decade. The most imported pork products are frozen ribs, which accounted for more than 90% of total pork imports. From 2016 to 2018, the pork imports increased due to recent drought coupled with the listeriosis outbreak that affected local supply. In 2020, the quantity and value of imports decreased by 40% and 19% respectively from the previous year. This marked the lowest imports in the past decade. The decrease in imports emanated from Covid 19 trade disruption and African Swine Fever (ASF) outbreak in Germany, the biggest supplier of pork to South Africa, whereby local importers were banned to buy their pork.

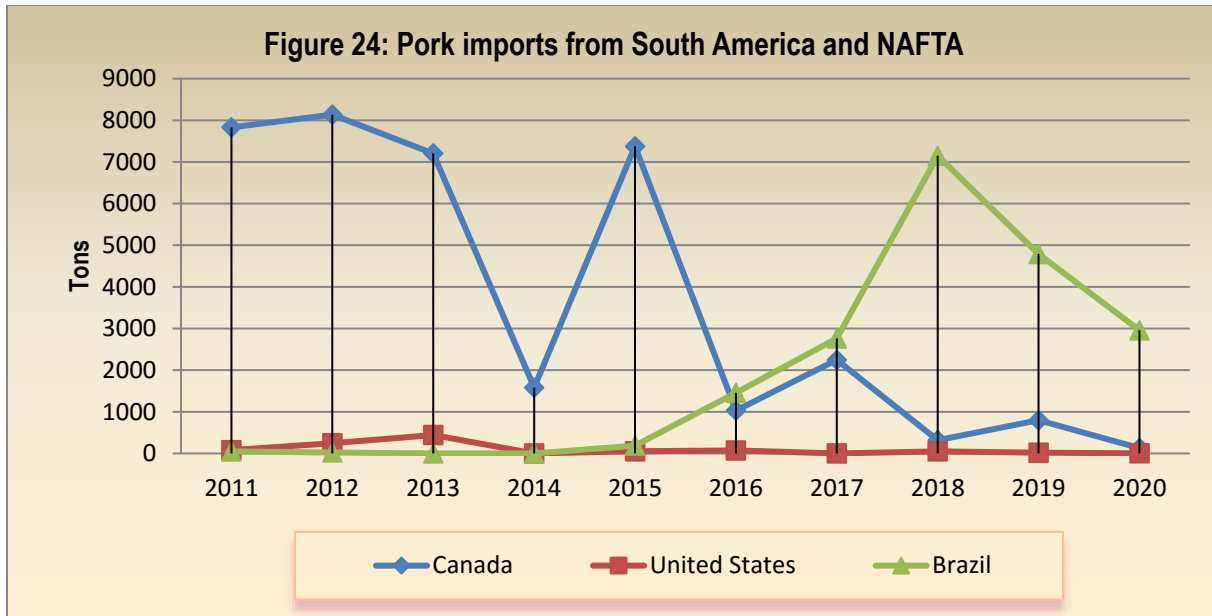
Figure 23 presents pork imports from the European Union member states during the past decade.



Source: Quantec EasyData

European Union (EU) supplied 80% of the total South African pork imports in 2020. During the past decade, the pork imports from European Union were dominated by Germany and Spain. Germany was the leading supplier for the past decade except in 2016. Spain outstripped Germany and became the biggest supplier of pork in that year. Spain became mostly the second highest supplier during the period reviewed. The significant decline (41%) of pork imports from the EU, particularly Germany has affected the total South African imports in 2020. Despite the huge decrease, Germany was still the highest exporter of pork meat to South Africa within the European Union countries with 56% total share, followed at a distance by Spain (20%) and France (7%). Hungary, Netherlands and Denmark were the lowest supplier of pork to South Africa.

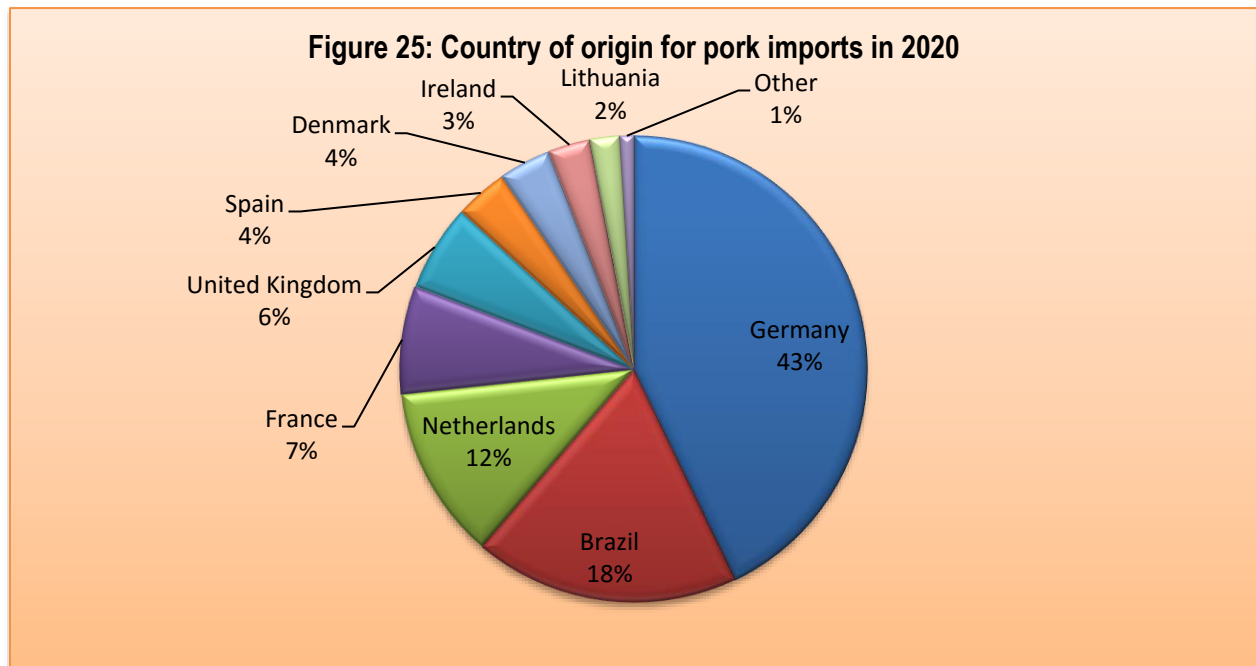
Figure 24 presents imports of pork for North American Free Trade Agreement (NAFTA) and South American countries from 2011 to 2020.



Source: Quantec EasyData

It can be observed from Figure 24 above that Canada was the biggest pork import market for South Africa until 2015. In 2016, Brazil increased its pork supply to South Africa and took a lead until 2020. Brazil is the second biggest supplier of pork in South Africa following Germany. On average, South African pork imports from North American Free Trade Agreement (NAFTA) and South America shows that Canada accounted for 64% of the market share, followed by Brazil (34%) and United State (2%). Intermittent imports of pork were recorded from the two countries hence the lowest shares.

Figure 25 below presents the top markets of South African pork imports during 2020.



Source: Quantec EasyData

Figure 25 indicates that in 2020, Germany accounted for the greatest share of pork imports of South Africa accounting for 43% followed by Brazil which obtained 18%, and Netherlands (12%) and France (7%). It is clear that most of pork imports are from the European Union, which accounted for 80% collectively.

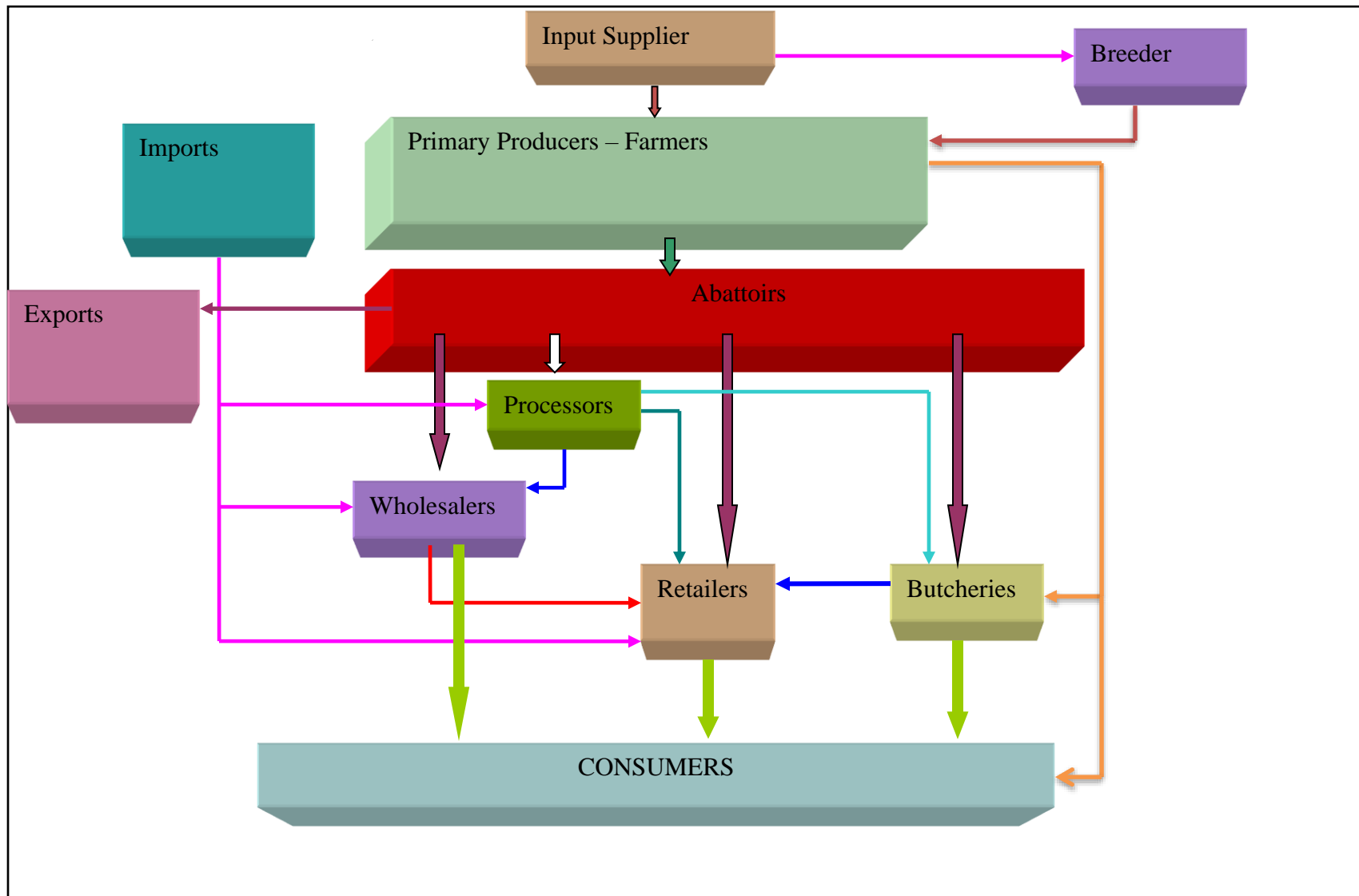
### **3. MARKETING CHANNELS / VALUE CHAIN**

Previous studies conducted on the ground indicates that the pork value chain operates on varying levels of horizontal and vertical intergration which makes the chain a difficult structure. Other organisations functions in the many levels on the chain. The pork value chain is presented in Figure 26.

Generally, the chain starts at the Input suppliers, value will be added until the product reaches the final consumer. The feed for pigs mainly includes grains, fish meal, bran and premixes. The input suppliers sell the stock to primary producers and also to breeders however breeders still sells to the primary producers too.

The primary producers are mainly farmers. Farmers grow the pigs and incur the cost of production which includes Feed, Medicine and Labour which accounts for 80% of total cost. The pigs are slaughtered at abattoirs but the farmer also sells to butcheries and final consumers. There are 143 abattoirs that slaughters pigs. The abattoirs sells meat to the butchers/wholesalers/retailers/processors. The meat can be bought by consumers directly from abattoirs and/or butcheries and/or wholesalers and/or retailers. In some cases the consumer buys live pig and perform processing activities him/herself.

Figure 26: Pork Marketing Channels



#### 4. OPPORTUNITIES AND CHALLENGES

Table 1 presents opportunities and challenges applicable to the pork industry in South Africa.

**Table 1: Opportunities and Challenges**

OPPORTUNITIES	CHALLENGES
Supplier of quality protein for human health	Very susceptible to world conditions and cheap imports
Industry with tremendous Growth Potential	Stiff competition both nationally and internationally
Pro-active in addressing consumer requirements and doing promotions	Health and safety issues
Dedicated social development training programme	Phytosanitary issues
	Outbreak of diseases such as swine fever and Foot and Mouth Disease (FMD)

#### 5. STRENGTHS AND WEAKNESSES

##### Strengths

- The turnaround production time is quicker than red meat production. It is becoming a meat of choice.
- Piggeries can be established in relatively small areas.
- Feed costs are much lower than other meat production costs.
- The demand for pork meat has increased significantly over the years due to the high prices and unavailability of red meat substitutes.

##### Weaknesses

- The industry is susceptible to diseases. Health, safety and phyto-sanitary issues can be inhibitive in terms of growth.
- Shortage of water could affect the cleaning of pens and this could be a challenge in terms of meeting the safety requirements.
- It is more labour intensive than the red meat industry.



## 6. MARKET INTELLIGENCE

### 6.1. Export tariffs

Tariffs that different importing countries applied to pork originating from South Africa in 2019 and 2020 are shown on Table 2.

**Table 2: Pork export tariffs**

Country	Product Code	Trade regime description	2019		2020	
			Applied tariffs	Total ad valorem equivalent tariff (estimated)	Applied tariffs	Total ad valorem equivalent tariff (estimated)
Namibia; Lesotho; Botswana and Eswatini	02031100; 02031200; 02031900; 02032100; 02032200; 02032900	Intra SACU rate	0%	0%	0%	0%
Mozambique;	02031190; 02031200; 02031900; 02032200; 02032190; 02032900; 02032900	Preferential tariff for SADC countries	0%	0%	0%	0%
Hong Kong, China	02031100; 02031200; 02031910; 02032100; 02032200; 02032900	MFN duties	0%	0%	0%	0%

Source: Market Access Map

Table 2 indicates that most of the applied tariffs in 2019 remained the same as in 2020. Mozambique provided South Africa with preferential tariff for SADC a rate of 0% in both 2019 and 2020 for pork exports of specified products in Table 1 above. Hong Kong, China Most Favoured Nations (MFN) duties for SA of 0% during 2019 and 2020. Lastly, Botswana, Lesotho, Namibia and Eswatini applied 0% through Intra SACU trade during the same period.

## 6.2. Import tariffs

Tariffs that South Africa applied to imports of pork originating from all possible countries in 2020 are shown on Table 3 below.

**Table 3: Pork import tariffs**

	Article Description	Statistical unit	Rate of Duty				
			General	EU	EFTA	SADC	MERCOSUR
<b>02.03</b>	<b>Meat of swine, fresh, chilled or frozen:</b>						
<b>0203.1</b>	<b>Fresh or chilled:</b>						
0203.11	Carcasses and half-carcasses	Kg	15% or 130c/kg	15% or 130c/kg	15% or 130c/kg	free	15% or 130c/kg
0203.12	Hams, shoulders and cuts thereof, with bone in	Kg	15% or 130c/kg	15% or 130c/kg	15% or 130c/kg	free	15% or 130c/kg
<b>0203.19</b>	<b>Other</b>						
0203.19.10	Rib	Kg	free	free	free	free	free
0203.19.90	Other	Kg	15% or 130c/kg	15% or 130c/kg	15% or 130c/kg	free	15% or 130c/kg
<b>0203.2</b>	<b>Frozen</b>						
0203.21	Carcasses and half-carcasses	Kg	15% or 130c/kg	15% or 130c/kg	15% or 130c/kg	free	15% or 130c/kg
0203.22	Hams, shoulders and cuts thereof, with bone in	Kg	15% or 130c/kg	15% or 130c/kg	15% or 130c/kg	free	15% or 130c/kg
<b>0203.29</b>	<b>Other</b>						
0203.29.10	Rib	Kg	free	free	free	free	free
0203.29.90	Other	Kg	15% or 130c/kg	15% or 130c/kg	15% or 130c/kg	free	15% or 130c/kg

Source: SARS

Table 3 above indicate the tariff duties applied by South Africa to trade agreement members of EU, EFTA, SADC, MERCOSUR and General members on sub products of meat of swine, fresh, chilled or frozen. South Africa applied tariff of 15% or 130c/Kg to trade agreements (EU, EFTA, MERCOSUR and General member of WTO) and duty free for SADC members with an exception of rib product. The rib products which was the highest imported product was duty free for all countries.

## 7. PERFORMANCE ANALYSIS OF SOUTH AFRICAN PORK INDUSTRY IN 2020

### 7.1. Exports

**Table 4: List of importing markets for pork, fresh, chilled or frozen exported by South Africa in 2020**

South Africa's exports represent **0.1%** of world exports for this Pork, fresh, chilled or frozen, its ranking in world exports is **31**.

Importers	Indicators														
	Value exported in 2020 (USD thousand)	Trade balance 2020 (USD thousand)	Share in South Africa's exports (%)	Quantity exported in 2020	Quantity unit	Unit value (USD/unit)	Growth in exported value between 2016-2020 (% p.a.)	Growth in exported quantity between 2016-2020 (% p.a.)	Growth in exported value between 2019-2020 (% p.a.)	Ranking of partner countries in world imports	Share of partner countries in world imports (%)	Total imports growth in value of partner countries between 2016-2020 (% p.a.)	Average distance between partner countries and all their supplying markets (km)	Concentration of all supplying countries of partner countries	Average tariff (estimated) faced by South Africa (%)
World	21732	-22557	100	10283	Tons	2113	3	6	-10		100	8			
Mozambique	8429	8429	38.8	3883	Tons	2171	18	17	8	88	0.01	8	1400	0.85	0
Namibia	4924	4924	22.7	2653	Tons	1856	-1	5	-23	87	0.01	-2	3235	0.52	0
Lesotho	2424	2424	11.2	1453	Tons	1668	-5	3	-34	98	0	3	369	1	0
Hong Kong, China	1926	1926	8.9	748	Tons	2575	66	32	2710	11	2	-8	10075	0.18	0
Botswana	1670	1670	7.7	496	Tons	3367	-14	-17	-35	110	0	-11	522	1	0
DRC	485	485	2.2	212	Tons	2288	-8	-5	59	81	0.02	-20	6596	0.24	10
Kuwait	318	318	1.5	54	Tons	5889	160	61							
Seychelles	215	215	1	79	Tons	2722	24	35	414	96	0	1	7484	0.11	15
Malawi	212	212	1	50	Tons	4240	-5	-3	50	147	0	1	1343	0.55	0
Eswatini	152	152	0.7	78	Tons	1949	-42	-39	-45						0
Egypt	151	151	0.7	47	Tons	3213				145	0	-26	9451	0.93	28.6

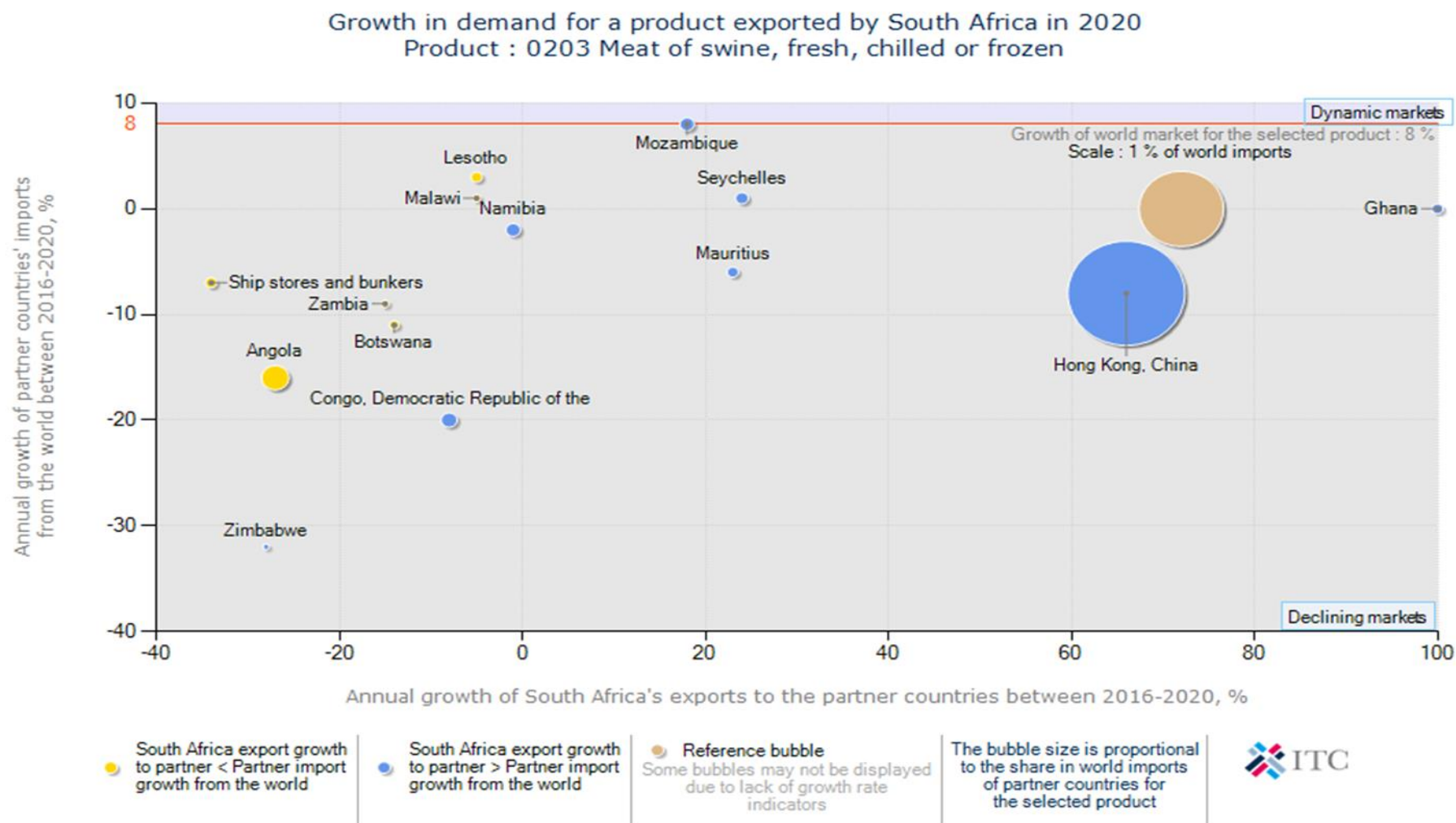
Source: ITC calculations based on COMTRADE statistics.

Table 4 presents the trade indicators of importing market of pork from South Africa in 2020. During this year, South Africa exported 10 283 tons of pork (fresh, chilled or frozen) at an average value of US\$2 113/unit. The major export destinations for pork (fresh, chilled or frozen) originating from South Africa during 2020 were Mozambique, Namibia and Lesotho. The greatest share of South African pork (fresh, chilled or frozen) exports were exported to Mozambique which demanded 38.8% followed by Namibia which commanded 22.7% and Lesotho with 11.2%.

South Africa's pork (fresh, chilled or frozen) exports increased by 3% in value and 6% in quantity during the period of 2016 and 2020. During the same period, exports of pork (fresh, chilled or frozen) to Mozambique, increased by 18% in value and 17% in quantity. Namibia decreased by 1% in value and increased by 5% in quantity. Lesotho decreased by 5% in value and increased by 3% in quantity during the same periods.

Between the period 2019 and 2020, South African exports of pork (fresh, chilled or frozen) to the world decreased by 10%. During the same periods, the exports to Mozambique increased by 8%, Namibia and Lesotho decreased by 23% and 34% respectively.

Figure 27: Growth in demand for pork, 2020



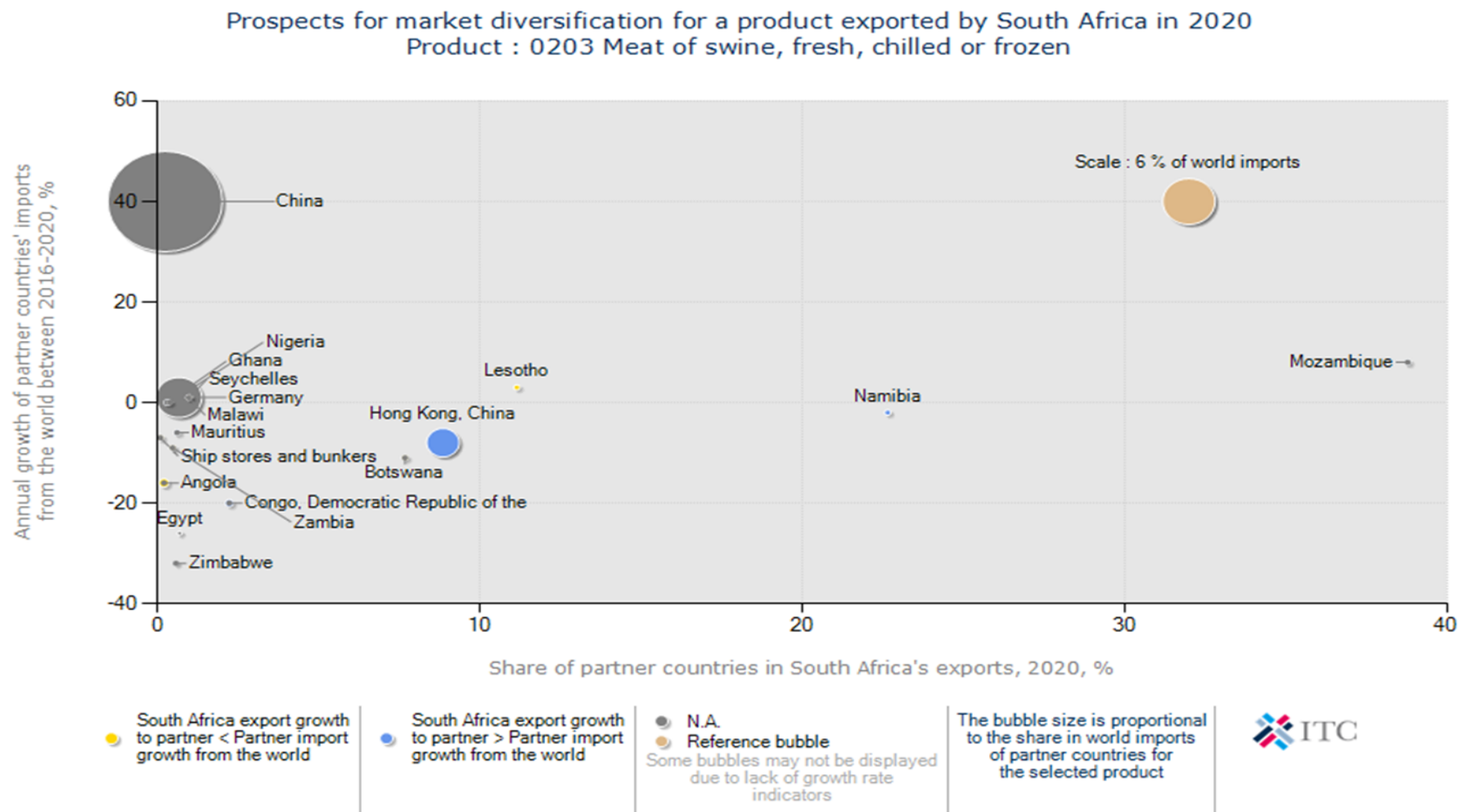
Source: Trademap

Growth in demand for South African pork in 2020 is depicted in Figure 27. The figure illustrates that between 2016 and 2020; South Africa's pork (fresh, chilled or frozen) exports to Angola, Lesotho and Botswana were growing at a rate that is less than their import growth from the rest of the world.

At the same period, South Africa's pork (fresh, chilled or frozen) exports to Hong Kong, China, Seychelles, Mauritius, Democratic Republic of Congo (DRC), Namibia, Mozambique and Namibia were growing at a rate that is greater than their imports from the rest of the world.

Zimbabwe represent loss in the declining market of South Africa pork (fresh, chilled or frozen) exports. While Ghana represent growth dynamic markets.

Figure 28: South African pork's prospects for market diversification in 2020



Source: ITC Trademap

Figure 28 shows the prospects for market diversification for pork (fresh, chilled or frozen) exports by South Africa in 2020. The figure above shows that Mozambique commanded the greatest shares of South Africa's pork (fresh, chilled or frozen) exports of 38% during the year 2020, followed by Namibia with 22.7%.

If South Africa wishes to diversify its pork (fresh, chilled or frozen) exports, the biggest market exists in China due to its annual growth imports of 40% and world import share of pork (fresh, chilled or frozen) of 31.3%.



## 7.2. Imports.

**Table 4: List of supplying markets for the Pork (fresh, chilled or frozen) imported by South Africa in 2020**

South Africa's imports represent **0.1%** of world exports for this Pork, fresh, chilled or frozen, its ranking in world exports is **52**.

Exporters	Indicators														
	Value imported in 2020 (USD thousand)	Trade balance 2020 (USD thousand)	Share in South Africa's imports (%)	Quantity imported in 2020	Quantity unit	Unit value (USD/unit)	Growth in imported value between 2016-2020 (% p.a.)	Growth in imported quantity between 2016-2020 (% p.a.)	Growth in imported value between 2019-2020 (% p.a.)	Ranking of partner countries in world exports	Share of partner countries in world exports (%)	Total exports growth in value of partner countries between 2016-2020 (% p.a.)	Average distance between partner countries and all their importing markets (km)	Concentration of all importing countries of partner countries	Average tariff (estimated) applied by South Africa (%)
World	44289	-22557	100	16091	Tons	2752	-7	-7	-29		100	7			
Germany	16772	-16626	37.9	6899	Tons	2431	-2	2	-46	3	13	3	2911	0.09	8
Brazil	8953	-8953	20.2	2957	Tons	3028	22	22	-18	7	5.7	10	14944	0.36	8
Netherlands	6365	-6365	14.4	1938	Tons	3284	37	33	544	6	7.9	11	4728	0.12	8
France	3540	-3540	8	1202	Tons	2945	2	5	-6	9	3.1	8	4434	0.14	8
United Kingdom	2562	-2562	5.8	969	Tons	2644	-2	-5	-16	13	1.5	13	5274	0.27	8
Spain	1716	-1716	3.9	591	Tons	2904	-43	-44	-83	1	17.4	16	6445	0.23	8
Denmark	1658	-1658	3.7	583	Tons	2844	5	7	402	5	8.4	4	5325	0.17	8
Ireland	1449	-1449	3.3	469	Tons	3090	-20	-20	702	14	1.5	2	6134	0.19	8
Lithuania	920	-920	2.1	327	Tons	2813			1300	33	0.04	8	435	0.3	8
Canada	271	-271	0.6	129	Tons	2101	-40	-41	-85	4	8.5	6	8057	0.26	8
China	72	-20	0.2	26	Tons	2769			-13	23	0.2	-24	946	0.76	8

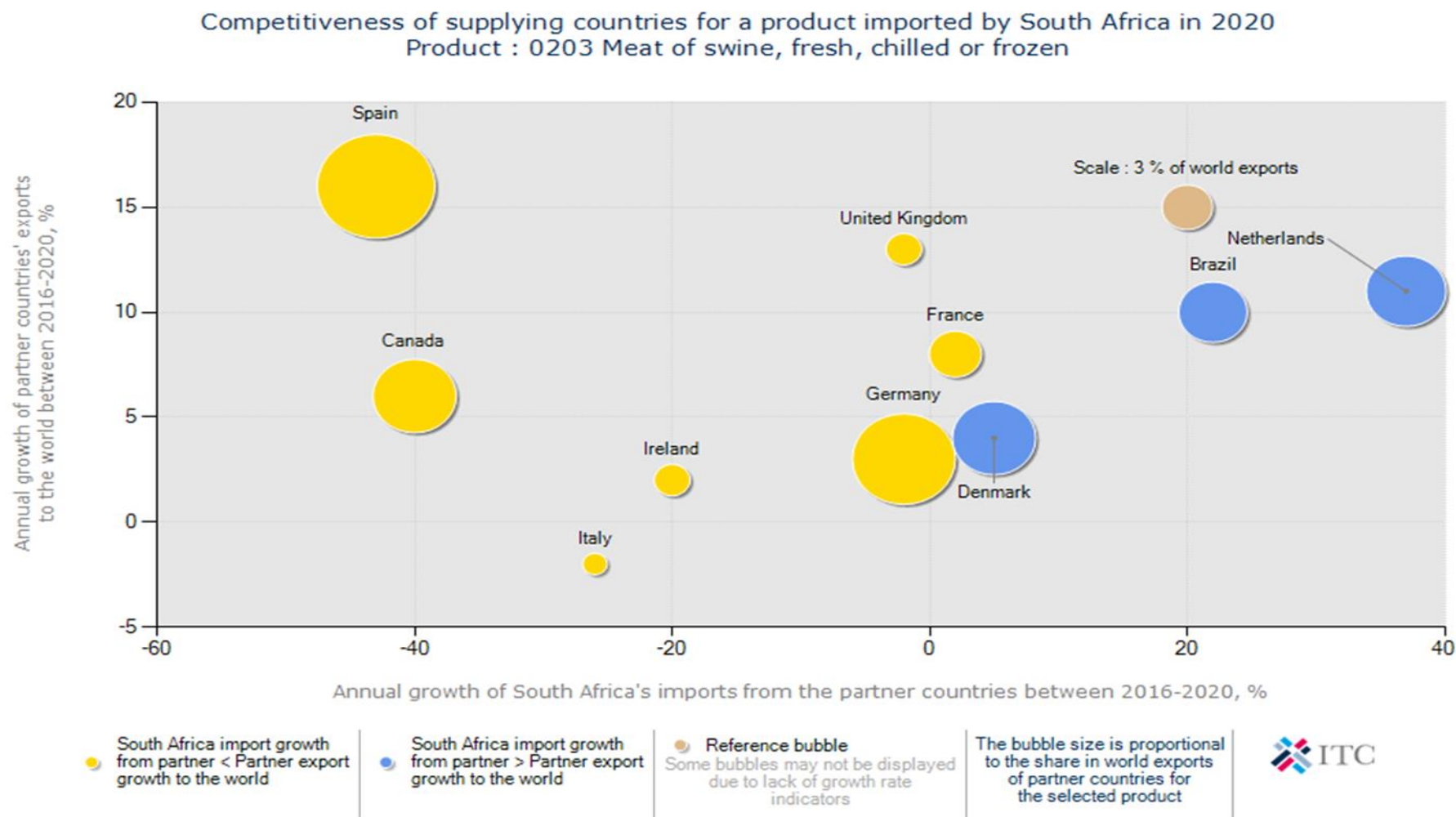
Source: ITC calculations based on COMTRADE statistics.

Table 4 provides a list of supplying nations for pork imported by South Africa in 2020. South Africa's imports represent 0.1% of world imports for pork (fresh, chilled or frozen) and its ranking in world imports is 52. Table 4 shows that during 2020 South Africa imported a total of 16 091 tons of pork (fresh, chilled or frozen) that worth US\$ 2 752/unit. The major origins for pork (fresh, chilled or frozen) imported by South Africa during 2020 were Germany with a share of 37.9%, followed by Brazil (20.2%) and Netherlands (14.4%).

South Africa's pork (fresh, chilled or frozen) imports decreased by 7% in value and 7% in quantity between the periods 2016 and 2020. During the same period, imports for pork (fresh, chilled or frozen) from Germany decreased by 2% in value and increased by 2% in quantity and imports from Brazil increased 22% in value and 22% in quantity.

Between the year 2019 and 2020, South Africa's imports of pork (fresh, chilled or frozen) decreased by 29% in value. During the same period, imports of pork (fresh, chilled or frozen) from Germany decreased by 46% and Brazil 18% while Netherlands increased by 544%.

Figure 29: Competitiveness of suppliers of South Africa's pork imports in 2020

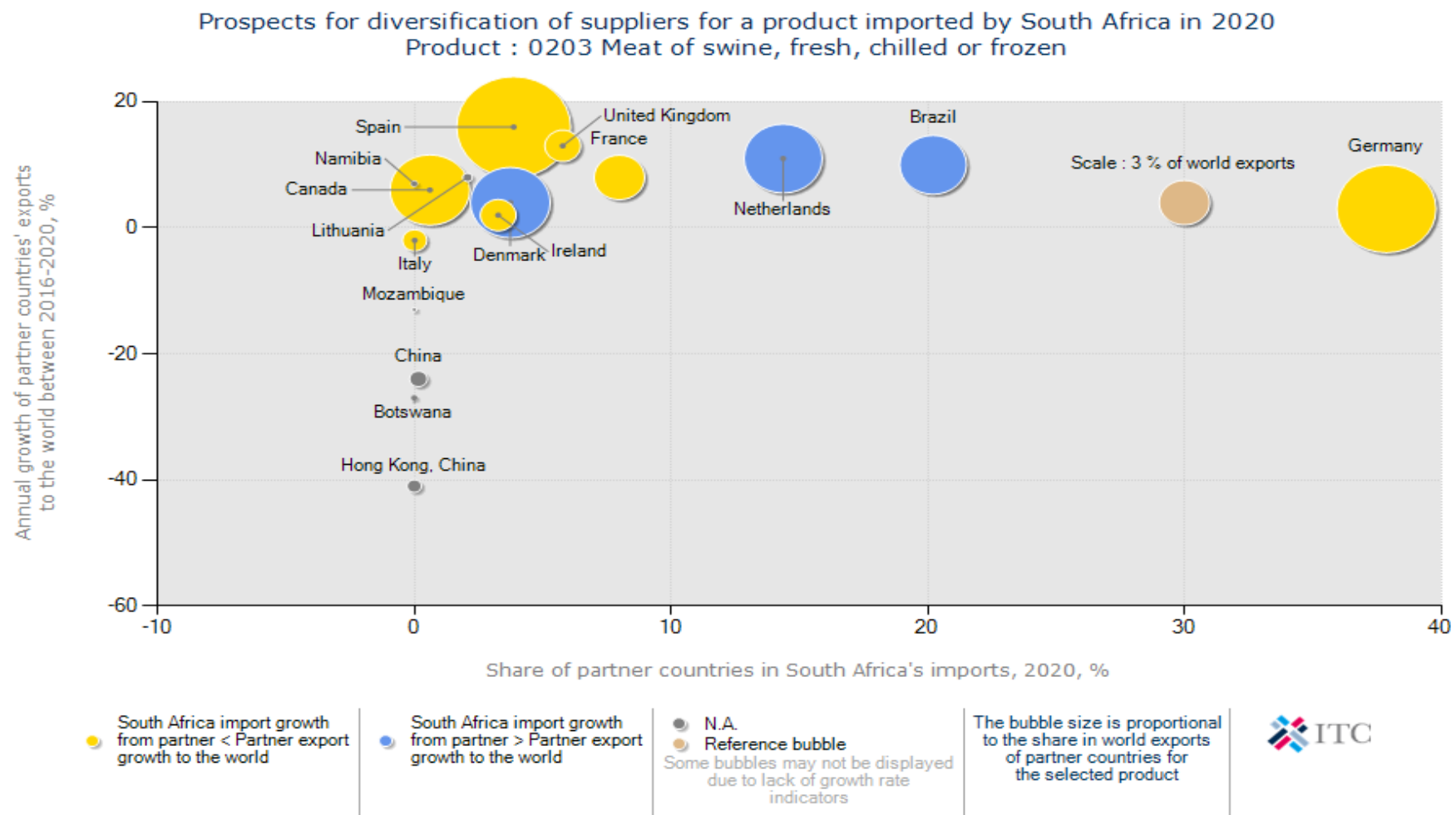


Source: ITC Trademap

Figure 29 depicts the competitiveness of suppliers to South Africa for pork in 2020. The figure illustrates that South Africa's pork (fresh, chilled or frozen) imports from Canada, France, Ireland, Spain, Italy and United Kingdom (UK) were growing at a rate that is less than their export growth to the rest of the world.

At the same time, South Africa's pork (fresh, chilled or frozen) imports from Brazil, Denmark and Netherlands were growing at a rate that is greater than their exports to the rest of the world. The most competitive market is Spain due to its world biggest share of 17.36% and Germany with a share of 13.03%.

Figure 30: Prospects for market diversification of suppliers of pork imported by South Africa in 2020



Source: ITC Trademap

Figure 30 illustrates prospects for diversification of suppliers of pork imported by South Africa in 2020. The analysis shows that Germany commanded the greatest shares of South Africa's pork (fresh, chilled or frozen) imports during the year 2020. Germany is the biggest supplier of pork (fresh, chilled or frozen) with a share of 38% in South African import market followed by Brazil with 20.2%.

Spain is the biggest market of pork imports with the world market share of 17.36%. South Africa can expand its imports from Spain because currently South Africa import growth from Spain is less than its exports to the world.

## 8. ACKNOWLEDGEMENTS

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- **Directorate: Statistics and Economic Analysis.**  
[www.dalrrd.gov.za](http://www.dalrrd.gov.za)
- **Quantec Easydata**  
[www.easydata.co.za](http://www.easydata.co.za)
- **ITC Market Access Map**  
<http://www.macmap.org/SouthAfrica>
- **ITC Trade Map**  
<http://www.trademap.org>.

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