

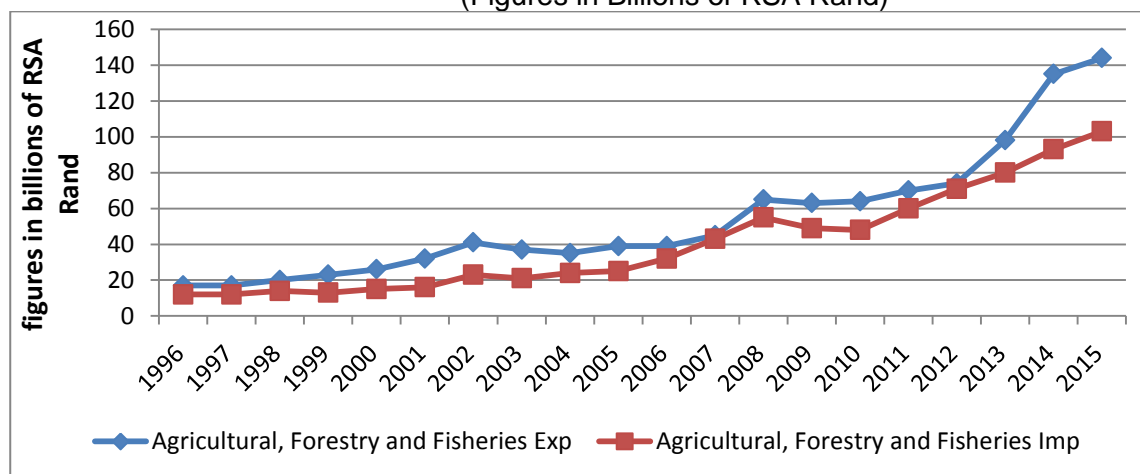
## SECTOR TRADE PERFORMANCE REVIEW DURING 2015 (STPR- 2015)

### SOUTH AFRICA'S AGRICULTURAL, FORESTRY AND FISHERIES (AFF) TRADE PERFORMANCE DURING 2015

#### PURPOSE

The purpose of this briefing is to inform stakeholders on the status of South Africa's agricultural, forestry and fisheries trade performance on an annual basis by analysing trade flows.

#### South Africa's agricultural, forestry and fisheries trade: 1996 to 2015. (Figures in Billions of RSA Rand)



Source: Global Trade Atlas, 2016

#### Key observations on the export side:

- South Africa's exports of AFF products increased by 7% in 2015.
- South Africa's total export value of AFF products amounted to R144.4 billion in 2015.
- South Africa's total export value of primary AFF products amounted to R71.6 billion in 2015.
- South Africa's total export value of secondary AFF products amounted to R72.8 billion in 2015.
- Edible fruits and nuts was South Africa's largest AFF sub-sector export with a value of R37.1 billion in 2015.
- Exports of cereals decreased the most by 43% in 2015.
- Exports of edible meat increased the most by 32% in 2015.
- Namibia was the largest export market for South Africa's AFF exports with a value of R11.1 billion in 2015.
- South Africa's exports of AFF products to Zambia had the highest growth rate at 27% in 2015.
- South Africa's exports of AFF products to Zimbabwe decreased by 10% in 2015.

#### Key observations on the import side:

- South Africa's imports of AFF products increased by 11% during 2015.
- South Africa's total import value of AFF products amounted to R102.9 billion in 2015.
- South Africa's total import value of processed AFF products amounted to R70.6 billion in 2015.

- South Africa's total import value of primary AFF products amounted to R32.2 billion in 2015.
- Cereals were South Africa's largest AFF sub-sector imports with a value of R14.2 billion in 2015.
- Imports of animal or vegetable fats decreased the most by 9% in 2015.
- Imports of cereals increased the most, by 30% in 2015.
- China was the largest supplier for South Africa's AFF imports with a value of R6.6 billion in 2015.
- South Africa's imports of AFF products from Argentina experienced the highest growth of 44% in 2015.
- South Africa's imports of AFF products from the United Kingdom decreased by 5% during 2015.

### 1. Analysis of South Africa's major agricultural, forestry and fisheries export markets and product drivers in 2015.

**Table1. South Africa's top ten largest export destinations for agricultural, forestry and fisheries products by value in 2014 and in 2015.**

Calendar year 2014			Calendar Year 2015				
Top 10 export markets	Share in SA total agric exports	Export value (bill Rand)	Top 10 export markets	Share in SA total agric exports	Export value (bill Rand)	Growth 2014-2015	Top 3 products exported into major markets
Namibia	7%	9.9	Namibia	8%	11.1	12%	cane sugar, cigarettes, corn
Netherlands	7%	9.0	United Kingdom	7%	9.6	18%	grapes, apples, wine
Botswana	6%	8.2	Netherlands	7%	9.6	6%	grapes, oranges, wine
United Kingdom	6%	8.2	China	6%	9.1	16%	chemical wood pulp, wool, wine
China	6%	7.9	Botswana	6%	8.8	8%	corn, sunflower seed, non-alcoholic beverages
Zimbabwe	5%	7.4	Mozambique	5%	7.3	6%	corn, cane sugar, food preparations
Mozambique	6%	6.9	Zimbabwe	5%	6.7	-10%	wheat, soybean, food preparations

Calendar year 2014			Calendar Year 2015				
Top 10 export markets	Share in SA total agric exports	Export value (bill Rand)	Top 10 export markets	Share in SA total agric exports	Export value (bill Rand)	Growth 2014-2015	Top 3 products exported into major markets
Lesotho	3%	4.6	Lesotho	3%	4.7	1%	maize, corn, cigarettes
Japan	3%	4.1	Zambia	3%	4.5	27%	food preparations, wheat, animal feed
Swaziland	3%	4.0	Swaziland	3%	4.2	4%	corn, animal feed, waters (mineral or sweetened)

- Namibia** ranked as South Africa's largest agricultural, forestry and fisheries export destination by value in 2015. The export value of agricultural, forestry and fisheries products to Namibia increased from R9.9 billion in 2014 to R11.1 billion in 2015. South Africa's exports of agricultural, forestry and fisheries products to Namibia increased by 12% growth in 2015. Namibia's share in South Africa's total agricultural, forestry and fisheries exports also increased from 7% in 2014 to 8% in 2015. The three major agricultural, forestry and fisheries products that South Africa exported to Namibia in 2015 were: cane sugar, cigarettes and corn.
- United Kingdom** improved its ranking from being South Africa's fourth largest agricultural, forestry and fisheries export destination to second position in 2015. The export value of agricultural, forestry and fisheries products from South Africa to the United Kingdom increased from R8.2 billion in 2014 to R9.6 billion in 2015. South Africa's exports of agricultural, forestry and fisheries products to the United Kingdom increased by 18% growth in 2015. The United Kingdom's share in South Africa's total agricultural, forestry and fisheries exports increased from 6% in 2014 to 7% in 2015. The three major agricultural, forestry and fisheries products that South Africa exported to the United Kingdom in 2015 were: grapes, apples and wine.
- The Netherlands** ranked the third largest export market for South Africa's agricultural, forestry and fisheries products by value. The export value of agricultural, forestry and fisheries products from South Africa to the Netherlands increased from R9.0 billion in 2014 to R9.6 billion in 2015. South Africa's agricultural, forestry and fisheries exports to the Netherlands increased by 6% growth in 2015. The Netherlands share in South Africa's total agricultural, forestry and fisheries exports was 7% in 2014 and in 2015. The three major agricultural, forestry and fisheries products that South Africa exported to the Netherlands in 2015 were: grapes, oranges and wine.

- **China** ranked the fourth largest export market for South Africa's agricultural, forestry and fisheries products by value. The export value of South Africa's agricultural, forestry and fisheries products to China increased from R7.9 billion in 2014 to R9.1 billion in 2015. South Africa's agricultural, forestry and fisheries exports to China increased by 16% growth in 2015. China's share in South Africa's total agricultural, forestry and fisheries exports was 6% in 2014 and in 2015. The three major products exported by South Africa to China during 2015 were: chemical wood-pulp, wool and wine.
- **Botswana** ranked the fifth largest export market for South Africa's agricultural, forestry and fisheries products and the second largest export market in Africa during 2015. The total export value of South Africa's agricultural, forestry and fisheries products to Botswana increased from R8.2 billion in 2014 to R8.8 billion in 2015. South Africa's total agricultural, forestry and fisheries exports to Botswana increased by 8% growth in 2015. Botswana's share in South Africa's total agricultural, forestry and fisheries exports was 6% in 2014 and in 2015. The three major products exported by South Africa to Botswana were: corn, sunflower seeds and non-alcoholic beverages.

### 1.1 Export market analysis during 2015:

**Table 2 South Africa's growing and declining agricultural, forestry and fisheries export markets during 2015.**

Growing Export Markets During 2015					
Ranking	Top 3 Growing Markets	Export Growth (2014-2015)	Top 3 Products driving export growth & their individual growth percentage (2014-2015)		
1	India	99%	chemical wood pulp (193%)	wood in chips (18%)	wool (11%)
2	United States of America	18%	macadamia nuts (80%)	oranges (32%)	wine (20%)
3	United Kingdom	17%	apples (50%)	grapes (21)	wine (3%)
Shrinking Export Markets During 2015					
Ranking	Top 3 Shrinking Markets	Shrinkage percentage (2014-2015)	Top 3 Products driving export shrinkage & their individual shrinkage percentage (2014-2015)		
1	Taiwan	-62%	corn (-99%)	grape fruit (-16%)	chemical wood pulp (-9%)
2	Indonesia	-25%	grapes (-82%)	oranges (-64%)	chemical wood pulp (-6%)
3	Angola	-18%	liqueurs & cordials (-25%)	cigarettes (-16%)	maize (-14%)

Table 2 above indicates that, of all South Africa's agricultural, forestry and fisheries export markets, India, the United States of America and the United Kingdom were the fastest growing export markets by value during 2015. Exports of chemical wood pulp to India, macadamia nuts to the United States of America and apples to the United Kingdom recorded the highest growth during 2015. The table further indicates that Taiwan, Indonesia and Angola recorded the highest negative growth during the same period. The fastest declines were: with corn to Taiwan, grapes to Indonesia and liqueurs and cordials to Angola.

## 1.2 Export market analysis at sub-sector level during 2015:

**Table 3. South Africa's top 10 major agricultural, forestry and fisheries export sub-sectors by value during 2015.**

Rank	Sub-sector Description (HS Level 2)	Exported value (bill Rand) 2015	Sub-sector share in RSA total AFF exp	Sub-sector growth in (2014 2015)	Top 3 products exported within the sub-sector	Top 3 export markets by value during 2015
1	(HS 08) edible fruits & nuts	37.1	38%	21%	citrus, grapes & apples	Netherlands, United Kingdom, Hong Kong
2	(HS 22) beverages, spirits & vinegar	16.1	16%	5%	wine, ethyl alcohol, waters	United Kingdom, Namibia, Germany
3	(HS 47) wood pulp	10.3	11%	15%	chemical wood pulp, scrap of paper, pulp of fibres	China, India, Indonesia
4	(HS 48) paper and paperboard	8.4	9%	6%	kraft paper, paper, cartons	Namibia, Zimbabwe, Botswana
5	(HS 20) preparations of vegetables, fruits & nuts	7.8	8%	10%	fruit juice, vegetables & fruit, nuts	Netherlands, Botswana, Namibia
6	(HS 44) wood & articles of wood	6.3	7%	14%	fuel in wood, wood in the rough, builders joiners & carpentry	Japan, Namibia, Botswana
7	(HS 03) fish	5.3	5%	0.9%	frozen fish, fish fillets, live molluscs	Italy, Spain, Hong Kong
8	(HS 10) cereals	5.0	5%	-43%	corn (maize), wheat & meslin, rice	Botswana, Zimbabwe, Namibia

Rank	Sub-sector Description (HS Level 2)	Exported value (bill Rand) 2015	Sub-sector share in RSA total AFF exp.	Sub-sector growth in (2014 2015)	Top 3 products exported within the sub-sector	Top 3 export markets by value during 2015
9	(HS 02) meat & edible meat	3.7	4%	32%	poultry, bovine, swine	Mozambique, Lesotho, Namibia
10	(HS 23) residues	3.4	3%	29%	preparations for animal feeding, flour, soybean oil cake	Namibia, Botswana, Zimbabwe

- Edible fruits and nuts** is the largest South African export sub-sector by value. Exports of the edible fruits and nuts increased by 21% growth from R30.6 billion in 2014 to R37.1 billion in 2015. The share of edible fruits and nuts in South Africa's total agricultural, forestry and fisheries exports also increased from 31% in 2014 to 38% in 2015. The three major products exported by South Africa under edible fruits and nuts sub-sector during 2015 were: citrus, grapes and apples. The Netherlands, the United Kingdom and Hong Kong were South Africa's three largest markets for the sub-sector by value during 2015.
- Beverages and vinegar-** remained South Africa's second largest sub-sector exports by value in 2015. Exports of the beverages and vinegar increased by 5% growth from R15.3 billion in 2014 to R16.1 billion in 2015. The share of beverages and vinegar in South Africa's agricultural, forestry and fisheries exports increased from 15% in 2014 to 16% in 2015. The three major products exported by South Africa under beverages and vinegar sub-sector during 2015 were: wine, ethyl alcohol and waters. The United Kingdom, Namibia and Germany were South Africa's three largest export markets for the sub-sector by value during 2015.
- Wood pulp-** South Africa's exports of wood pulp increased by 15% growth from R8.9 billion in 2014 to R10.3 billion in 2015. The share of wood pulp in South Africa's agricultural, forestry and fisheries exports increased from 9% in 2014 to 11% in 2015. The three major products exported by South Africa under wood pulp sub-sector during 2015 were: chemical wood pulp, scrap of paper and pulp of fibres from recovered paper. China, India and Indonesia were South Africa's three largest export markets for the sub-sector by value during 2015.
- Paper and Paperboard-** South Africa's exports of paper and paperboard increased by 6% growth from R7.5 billion in 2014 to R8.4 billion in 2015. The share of paper and paperboard in South Africa's agricultural, forestry and fisheries exports increased from 8% in 2014 to 9% in 2015. The three major products exported by South Africa under paper and paperboard sub-sector during 2015 were: kraft paper, paper and cartons. Namibia, Zimbabwe and Botswana were South Africa's three largest export markets for the sub-sector by value during 2015.

- **Preparation of vegetables, fruits and nuts-** South Africa's exports of preparations of vegetables, fruits and nuts increased by 10% growth from R7.1 billion in 2014 to R7.8 billion in 2015. The share of preparation of vegetables, fruits and nuts in South Africa's agricultural, forestry and fisheries exports increased from 7% in 2014 to 8% in 2015. The three major products exported by South Africa under preparation of vegetables, fruits and nuts sub-sector during 2015 were: fruit juice, vegetables and fruits nuts. Netherlands, Botswana and Namibia were South Africa's three largest export markets for the sub-sector by value during 2015.

## 2. Analysis of South Africa's major suppliers of agricultural, forestry and fisheries products in 2014 and in 2015.

**Table 4. South Africa's top ten suppliers of agricultural, forestry and fisheries products by value in 2014 and in 2015.**

Calendar year 2014			Calendar year 2015				Top 3 products Imported into major markets
Top 10 import markets	Share in SA total agric imports	Import value (bill Rand)	Top 10 import markets	Share in SA total agric imports	Import value (bill Rand)	Growth during 2014-2015	
China	6%	5.9	China	6%	6.6	11%	animal guts, peptones, apple juice
Germany	6%	5.6	Argentina	6%	6.0	44%	soybean, corn (maize), grape juice
United kingdom	6%	5.4	Germany	6%	5.7	2%	wheat, meat of swine, folding cartons
United States	5%	4.5	Brazil	5%	5.4	33%	chicken cuts, meat & offal of chicken, corn
Indonesia	5%	4.5	United Kingdom	5%	5.1	-5%	whiskies, printed books, chicken cuts
Thailand	5%	4.3	Thailand	5%	5.1	18%	rice, sardines, tunas
Argentina	5%	4.2	Swaziland	5%	4.8	23%	cane sugar, tropical wood, chewing gum
Brazil	4%	4.0	Namibia	5%	4.6	18%	cattle live, beer, sardines

Calendar year 2014			Calendar year 2015				Top 3 products Imported into major markets
Top 10 import markets	Share in SA total agric imports	Import value (bill Rand)	Top 10 import markets	Share in SA total agric imports	Import value (bill Rand)	Growth during 2014-2015	
Namibia	4%	3.9	United States	4%	4.3	-4%	printed books, food preparations, chemical wood pulp
Swaziland	4%	3.9	India	4%	4.2	9%	rice, shrimps and prawns, paperboard

## 2.1 Import market analysis during 2014 and 2014 calendar years:

- China** remains the largest supplier of South Africa's agricultural, forestry and fisheries products by value during 2015. South Africa's import value of agricultural, forestry and fisheries products from China increased from R5.9 billion in 2014 to R6.6 billion in 2015. Imports of agricultural, forestry and fisheries products from China increased by 11% growth in 2015. China's share in South Africa's total agricultural, forestry and fisheries imports was 6% in 2014 and in 2015. The three major products that South Africa imported from China were: animal guts, peptones and apple juice.
- Argentina** was South Africa's second largest supplier of agricultural, forestry and fisheries products. South Africa's import value of agricultural, forestry and fisheries products from Argentina increased from R4.2 billion in 2014 to R6.0 billion in 2015. Imports of agricultural, forestry and fisheries products from Argentina increased by 44% growth in 2015. Argentina's share in South Africa's total agricultural, forestry and fisheries imports increased from 5% in 2014 to 6% in 2015. The three major products that South Africa imported from Argentina during 2015 were: soybeans, corn (maize) and grape juice.
- Germany** was South Africa's third largest supplier of agricultural, forestry and fisheries products. South Africa's imports of agricultural, forestry and fisheries products from Germany increased in terms of value and share during 2015. South Africa's import value of agricultural, forestry and fisheries products from Germany to South Africa increased from R5.6 billion in 2014 to R5.7 billion in 2015. South Africa's imports of agricultural, forestry and fisheries products from Germany increased by 2% growth in 2015. Germany's share in South Africa's total agricultural, forestry and fisheries products was 6% in 2014 and in 2015.



The three major products that South Africa imported from Germany during 2015 were: wheat, meat of swine and folding cartons.

- **Brazil** was the fourth largest supplier of South Africa’s agricultural, forestry and fisheries products by value during 2015. The import value of agricultural, forestry and fisheries products from Brazil to South Africa increased from R4.0 billion in 2014 to R5.4 billion in 2015. Brazil’s share in South Africa’s total import value of agricultural, forestry and fisheries products increased from 4% in 2014 to 5% in 2015. South Africa’s imports of agricultural, forestry and fisheries products from Brazil increased by 33% growth in 2015. The three major products that South Africa imported from Brazil during 2015 were: chicken cuts, meat and offal of chickens.
- The **United Kingdom** was the fifth largest supplier of South Africa’s agricultural, forestry and fisheries products by value during 2015. The import value of agricultural, forestry and fisheries products from the United Kingdom to South Africa also declined from R5.4 billion to R5.1 billion. South Africa’s imports of agricultural, forestry and fisheries products from United Kingdom decreased by 5% in 2015. The United Kingdom’s share in South Africa’s total imports of agricultural, forestry and fisheries products declined from 6% in 2014 to 5% in 2015. The three major products that South Africa imported from United Kingdom during 2015 were: whiskies, printed books and chicken cuts.
- It is very important to note that none of the countries from **Africa** appeared in South Africa’s top ten suppliers of agricultural, forestry and fisheries products by value during both 2014 and 2015 calendar years observed.

**Table 5 below provides an indication of growing and declining suppliers of South Africa’s agricultural, forestry and fisheries products during 2015.**

**Table 5. South Africa’s growing and shrinking suppliers of agricultural, forestry and fisheries products during 2015.**

Growing Import Markets During 2015					
Ranking	Top 3 Growing Markets	Import Growth (2014-2015)	Products with the highest import growth & their individual growth percentage (2014-2015)		
1	Argentina	44%	grape juice (87%)	soybean oil (82%)	apple juice (47%)
2	Brazil	33%	coffee extracts (106%)	kraft paper (87%)	chicken cuts (75%)
3	Malaysia	30%	tea mate extracts (1551%)	coffee extracts (1231%)	printed books (1088%)

Shrinking Import Markets During 2015					
Ranking	Top 3 Shrinking Markets	Shrinkage percentage (2014-2015)	Products with the highest import shrinkage & their individual shrinkage percentage (2014-2015)		
1	Indonesia	-18%	printed books (-98%)	cigarettes (-75%)	wine (-97%)
2	Russia	-12%	printed books (-70%)	kraft paper (-63%)	cigarettes (-48%)
3	Zimbabwe	-6%	vegetable seeds (-98%)	plywood (-94%)	Food preparations (-82%)

Table 5 indicates that, of all South Africa's agricultural, forestry and fisheries import markets; Argentina, Brazil and Malaysia ranked the highest in terms of import growth during the 2015 calendar year. Imports of grape juice from Argentina, coffee extracts from Brazil and tea mate extracts from Malaysia recorded the highest growth during 2015. South Africa's imports from Indonesia, Russia and Zimbabwe declined significantly during 2015 with printed books from Indonesia, printed books from Russia and vegetable seeds from Zimbabwe declining the most.

## 2.2 Imports analysis at sub-sector level in 2014 to 2015:

**Table6. South Africa's top 10 major agricultural, forestry and fisheries import sub-sectors by value in 2014 and 2015.**

Sub-sector Description (HS Level 2)	imported value (bill Rand) 2015	Sub-sector share in RSA total AFF exp	Sub-sector trade growth between 2014 & 2015	Top 3 products imported within the sub-sector	Top 3 import markets by value during 2015
(HS 10) cereals	14.2	14%	30%	wheat & meslin, rice, maize	Thailand, Russia, India
(HS48) paper and paperboard	12.3	12%	9%	paperboard, kraft paper, cartons	Germany, China, Finland
(HS15) animal or vegetable fats	7.6	7%	-9%	palm oil, soybean oil, sunflower seed	Indonesia, Malaysia, Argentina
(HS 02) meat & edible meat offal	7.1	7%	15%	meat & offal of poultry, meat of swine, bovine, sheep	Brazil, Netherlands, Belgium
(HS 22) beverages, spirits & vinegar	6.1	6%	4%	ethyl alcohol, waters sweetened, beer made from malt	United Kingdom, France, Namibia

Sub-sector Description (HS Level 2)	imported value (bill Rand) 2015	Sub-sector share in RSA total AFF exp	Sub-sector trade growth between 2014 & 2015	Top 3 products imported within the sub-sector	Top 3 import markets by value during 2015
(HS 23) residues	5.3	5%	-2%	soybean oilcake, preparations used in animal, flour	Argentina, Netherlands, France
(HS17) sugar & sugar confectionary	5.2	5%	17%	cane of beet, sugar confectionary, sugar nesoi	Swaziland, Brazil, India
(HS 44) wood and wood articles	4.7	5%	11%	wood sawn, plywood, fiberboard of wood	Swaziland, China, Malaysia
(HS 21) miscellaneous edible preparations	3.9	4%	15%	food preparations, extracts of coffee, sauces	United States, Germany, Netherlands
(HS 03) fish	2.9	3%	12%	frozen fish, crustaceans, fish fillets	Namibia, India, Norway

- Cereals-** Imports of cereals remained South Africa's largest AFF import sub-sector by value over the past four years. Imports of cereals increased by 30% growth from R10.9 billion in 2014 to R14.2 billion in 2015. The share of cereals in South Africa's agricultural, forestry and fisheries imports increased from 12% in 2014 to 14% in 2015. The three major products imported by South Africa under cereals sub-sector in 2015 were: wheat, rice and maize. Thailand, Russia and India ranked three largest suppliers for South African imported cereals by value during 2015
- Paper and paperboard-** Imports of paper and paperboard into South Africa increased by 9% growth from R11.3 billion in 2014 to R12.3 billion in 2015. The share of paper and paperboard in South Africa's agricultural, forestry and fisheries imports was 12% in 2014 and in 2015. The three major products imported by South Africa under paper and paperboard sub-sector in 2015 were: paperboard, kraft paper and cartons. Germany, China and Finland ranked three largest suppliers for South African imported paper and paperboard by value during 2015
- Animal or vegetable oil-** Imports of animal or vegetable oil into South Africa decreased by 9% from R8.6 billion in 2014 to R7.6 billion in 2015. The share of animal or vegetable oil in South Africa's agricultural, forestry and fisheries imports decreased from 9% in 2014 to 7% in 2015. The three major products imported by South Africa under animal or vegetable oil sub-sector in 2015 were: palm oil, soybean oil and sunflower seed. Indonesia, Malaysia and Argentina ranked three largest suppliers for South African imported animal and vegetable oil by value during 2015.

- **Meat and edible meat offal-** Imports of meat into South Africa increased by 15% growth from R6.1 billion in 2014 to R7.1 billion in 2015. The share of meat and edible meat offal in South Africa's agricultural, forestry and fisheries imports was 7% in 2014 and in 2015. The three major products imported by South Africa under meat and edible meat offal sub-sector in 2015 were: meat and offal of poultry, meat of swine, bovine and sheep. Brazil, the Netherlands and Belgium ranked three largest suppliers for South African imported meat and meat offal by value in 2015.
- **Beverages and spirits-** Imports of beverages and spirits into South Africa increased by 4% growth from R6.0 billion in 2014 to 6.2 billion in 2015. The share of beverages and spirits in South Africa's agricultural, forestry and fisheries was 6% in 2014 and in 2015. The three major products imported by South Africa under beverages and spirits sub-sector in 2015 were: ethyl alcohol, waters sweetened and beer made from malt. The United Kingdom, France and Namibia ranked three largest suppliers for South African beverages and spirits by value in 2015.

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