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Department:  
Agriculture, Forestry and Fisheries  
REPUBLIC OF SOUTH AFRICA

# **Trade Performance Review of the Agriculture, Forestry and Fisheries (AFF) sector of South Africa: 2017 to 2018**

Author: Ms. Samkelisiwe Ngwenya (Economist)

Supervisor: Mr. Tshepo Ranoto

Enquiries: Department of Agriculture, Forestry and Fisheries

Directorate: International Trade

Data Source: Global Trade Atlas

## Executive Summary

The purpose of this annual report is to inform sector stakeholders about the status of South Africa's imports and exports performance for agriculture, forestry and fisheries products by analysing trade flows for 2018 compared to 2017.

### Key observations on export performance in 2018

- South Africa's exports of AFF products increased by 6.02% in value terms from 2017 to 2018.
- South Africa's total export value of AFF products was R177.25 billion for the 2018 calendar year.
  - In 2018, South Africa's total export value for primary AFF products was R85.91 billion. (48% of total AFF exports)
  - The total export value for secondary AFF products was R91.34 billion. (52% of AFF exports)
- Edible fruits and nuts (HS08) were South Africa's largest product grouping export category with a value of R48.74 billion. (28% of total AFF exports)
- Exports of sugars and sugar confections (HS17) had the highest growth rate of 22.34% per annum from 2017 to 2018.
- Netherlands was the largest export destination market for South Africa's AFF products; with an export value of R13.58 billion in 2018. The main products that were exported to the Netherlands were fresh grapes, fresh oranges and avocados.
- Among the top 10 destination markets identified, South Africa's export growth of AFF products to China notably increased by 25.54% per annum. The three major products exported to China were wool, wood pulp and fresh oranges.
- South Africa's exports of AFF products to Japan decreased the most at a declining rate of 17.97% per annum from 2017 to 2018. The three major products exported were wood chips, maize corn and vegetable products.

### Key observations on imports in 2018

- South Africa's imports of AFF products decreased by 10.31% in value terms from 2017 to 2018.
- South Africa's total import value of AFF products amounted to R129.45 billion for the 2018 calendar year.
  - In 2018, South Africa's total import value of primary AFF products was R36.35 billion. (28% of total AFF imports)
  - The total import value for secondary AFF products was R93.09 billion. (72% of total AFF imports)
- Printed books, brochures and manuscripts (HS49) were South Africa's largest import product grouping with a value of R15.39 billion.
- Imports of printed books (HS49) had the highest annual import growth rate of 153.17% from 2017 to 2018.
- The United Kingdom was the largest supplier of AFF products to South Africa, with an imported value of R13.31 billion (10.31% of total AFF). The main products that were

imported in 2018 from the United Kingdom were unused postage, whiskies and printed books

- Among the top 10 supplier markets, South Africa's import growth of AFF products from the United Kingdom increased most by 96.45% per annum.
- South Africa's imports of AFF products from Argentina decreased the most at a declining rate of 11.27% per annum from 2017 to 2018. The three major products imported were soybean oilcake, wheat & meslin and refined soybean.

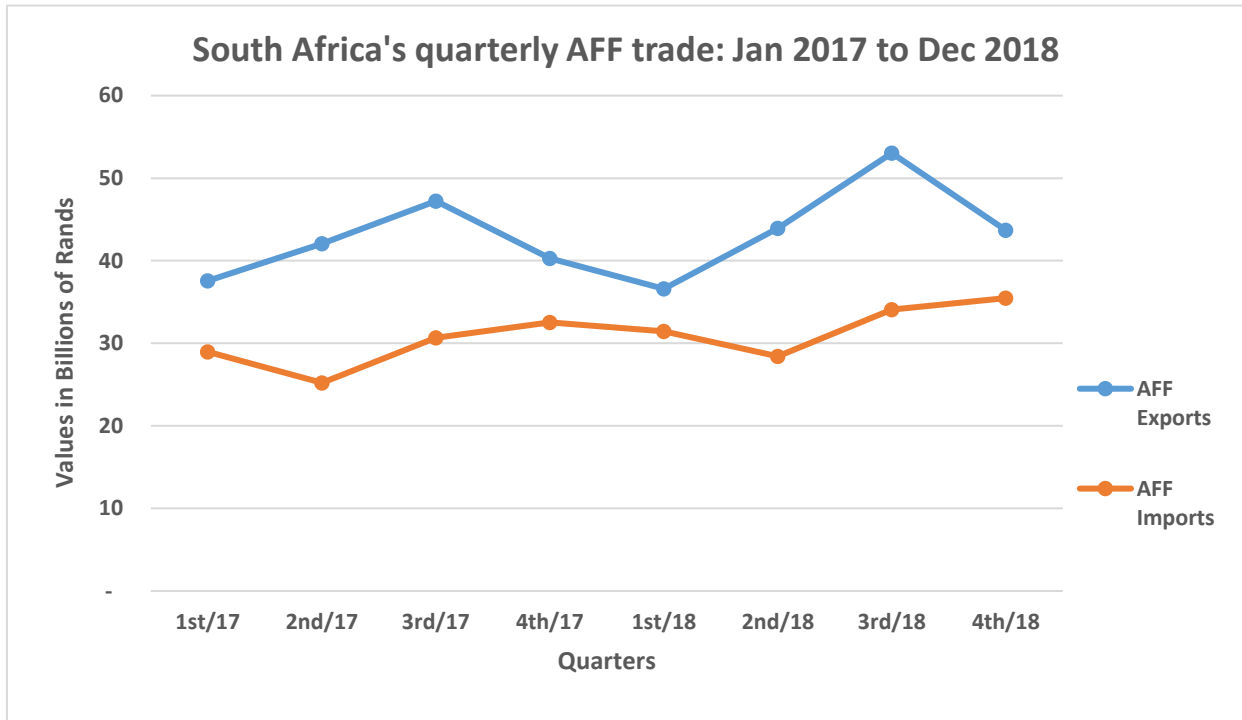


Figure 1: Quarterly series of South Africa's agriculture, forestry and fisheries trade for 2017 and 2018

**1. Analysis of South Africa's major agriculture, forestry and fisheries export markets and product drivers in 2018**

**Table 1: South Africa's top 10 largest export destinations for agriculture, forestry and fisheries products by value in 2018**

Partner Country	Values (Billion Rands) 2018	% share of total AFF exports by value	% Change from 2017 to 2018	Top 3 products exported into major markets
<b>World</b>	177.25	100.00	6.02	
<b>Sub-total</b>	90.61	51.12		
<b>Netherlands</b>	13.58	7.66	9.15	Fresh grapes Fresh oranges Fresh or dried avocados
<b>China</b>	13.30	7.51	25.54	Wool Chemical wood pulp Fresh oranges
<b>United Kingdom</b>	12.11	6.83	10.78	Fresh grapes Wine Fresh apples
<b>Namibia</b>	11.27	6.36	2.59	Cane or beet sugar Cigarettes containing tobacco Wine
<b>Botswana</b>	10.74	6.06	3.99	Maize corn Waters Sunflower-seed or safflower Oil
<b>Mozambique</b>	8.01	4.52	5.58	Cane or beet sugar Soups or broths Malt beer
<b>United States</b>	5.71	3.22	13.71	Macadamia nuts Wine Fresh oranges
<b>Lesotho</b>	5.56	3.13	1.42	Groats and meal of maize corn Chicken cuts Cigarettes containing tobacco
<b>Japan</b>	5.30	2.99	- 17.97	Wood chips or particles Maize corn Vegetable products
<b>Zimbabwe</b>	5.03	2.84	- 14.53	Prepared animal feed Soybean oil Sauces

Source: Global Trade Atlas, 2018

The top ten export destinations for AFF exports contributed 51% of the total AFF exports value of R177.25 billion in 2018.

In 2018, **the Netherlands** remained the largest export destination market for South Africa's agriculture, forestry and fisheries (AFF) products with a value of R13.58 billion. From 2017 to 2018, exports increased in value by 9.15% per annum and the share of total AFF exports to

the Netherlands was 7.66%. The top three products exported to the Netherlands were fresh grapes, fresh oranges and fresh or dried avocados.

**China** moved up the rank and ranked the second largest export destination market with a value of R13.30 billion. Exports of AFF products to China increased 25.54% and had a market share of 7.51% of the total AFF products. The top three products exported to China were wool, chemical wood pulp and fresh oranges.

**The United Kingdom** also moved up the rank and was the third largest export destination market, with a value of R12.11 billion and share of 6.83% of the total AFF products exported from South Africa. The value exported increased by 10.78% per annum from 2017 to 2018. The top three products exported to the United Kingdom were fresh grapes, wine and fresh apples.

**Namibia** moved down the rank and was the fourth largest export destination with an export value R11.27 billion of AFF products from South Africa, with a share of 6.36% of the total AFF products. The exported value increased by 2.59% per annum from 2017 to 2018. The top three products that attributed to the positive change were sugar, cigarettes and wine.

**Botswana** remained the fifth largest export destination market for South Africa's AFF products with a value of R10.74 billion with a share of 6.06% of the total AFF exports. The annual growth rate increased by 3.99% and the top three products exported to Botswana were maize corn, waters and sunflower seed oil.

### 1.1. Export market growth analysis during 2018

**Table 2: South Africa's growing and declining agriculture, forestry and fisheries export markets in 2018**

Growing export markets during 2017/2018						
Ranking	Top 3 growing markets	Values (Billion Rands)	Export growth (%)	Top 3 products driving export growth and their individual growth percentage		
1	Viet Nam	3.29	76.06	Maize corn (∞)	Fresh grapes (52.6%)	Cotton (∞)
2	Spain	3.02	55.88	Frozen hake fillets (66.83%)	Frozen hake (19.26%)	Macadamia nuts (54.21%)
3	Malaysia	2.27	54.20	Fresh oranges (10.64%)	Dog and cat food (182.85%)	Sauces (10.03%)
Shrinking export markets during 2017/2018						
Ranking	Top 3 shrinking markets	Values (Billion Rands)	Export shrinkage (%)	Top 3 products driving export shrinkage and their individual shrinkage percentage		
1	Kenya	1.08	- 47.07	Wood particle board (-4.70%)	Krafliner (-5.28%)	Fresh oranges (-27.49%)
2	Angola	1.96	- 28.93	Groats and meal of maize corn (-26.54%)	Cigarettes containing tobacco (-39.00%)	Fresh apples (-19.20%)

3	Hong Kong	3.88	- 25.45	Macadamia nuts (-29.36%)	Fresh oranges (-1.98%)	Fresh grapes (-38.81%)
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Source: Global Trade Atlas, 2018

The selection in table 2 looks at SA's export destination markets that had an export value greater or equal to one billion Rand. Table 2 shows that, of mentioned selection criteria, South Africa's export of agriculture, forestry and fisheries products to Viet Nam, Spain and Malaysia were the fastest growing markets in value terms. In 2018, exports of maize corn and cotton to Viet Nam recorded infinite growth rate, followed by dog and cat food to Malaysia with an annual growth rate of 182.85%. The table further shows shrinking annual growth of exports to Kenya, Angola and Hong Kong. The shrinkage was mostly influenced by the exports of cigarettes to Angola, fresh grapes and macadamia nuts to Hong Kong.

## 1.2. Export market analysis at product grouping level (HS2) in 2018

**Table 3: South Africa's top 10 major agriculture, forestry and fisheries product groupings by value in 2018**

Product grouping description	Exported value (Bill Rands)	Product grouping share in SA total AFF exports (%)	Product grouping growth (%)	Top 3 products exported within the product grouping	Top 3 export markets by value
<b>HS 08</b> Edible fruits and nuts	48.74	27.50	7.95	Fresh or dried citrus fruit, Fresh or dried grapes, Fresh apples, pears and quinces	Netherlands, United Kingdom, China
<b>HS 22</b> Beverages, spirits and vinegar	18.74	10.57	6.39	Wine, Ethyl alcohol, Ethyl alcohol under 80%	United Kingdom, Namibia, Germany
<b>HS 47</b> Wood Pulp	12.07	6.81	- 3.74	Chemical wood pulp, dissolving grades, Chemical wood pulp, not dissolving grades, Waste and scrap of paper or paperboard	China, India, Indonesia
<b>HS 48</b> Paper, paperboard and articles	9.11	5.14	9.94	Kraft paper and paperboard, Cartons, Paper for writing	Namibia, Zimbabwe, Botswana
<b>HS 20</b> Prepared vegetables, fruit, nuts or other plant parts	8.90	5.02	12.86	Fruit and vegetable juice, Prepared fruit and nuts, Prepared frozen vegetables not elsewhere specified	Netherlands, Botswana, Namibia,

Product grouping description	Exported value (Bill Rands)	Product grouping share in SA total AFF exports (%)	Product grouping growth (%)	Top 3 products exported within the product grouping	Top 3 export markets by value
<b>HS 44</b> Wood and wood articles	7.75	4.37	8.78	Fuel wood, Stripped wood in the rough, Builders and carpentry wood	Japan, Botswana, Namibia
<b>HS 10</b> Cereals	7.36	4.15	- 4.95	Maize corn, Rice, Wheat and meslin	Viet Nam, Botswana, Eswatini
<b>HS 03</b> Fish, crustaceans and aquatic invertebrates	7.17	4.05	20.30	Live fresh molluscs, Chilled or frozen fish fillets, Frozen fish	Spain, Italy, Hong Kong
<b>HS 17</b> Sugars and sugar confectionary	6.38	3.60	22.34	Cane or beet sugar, Sugar confection, Pure lactose and caramel sugars	Mozambique, Namibia, Malaysia
<b>HS 21</b> Miscellaneous edible preparations	5.97	3.37	0.60	Food preparations not elsewhere specified, Sauces, Soups	Mozambique, Botswana, Namibia

Source: Global Trade Atlas, 2018

The top 10 export product groups in table 3 were highly concentrated with a market share of 75% but relatively less concentrated compared to 2017 with a share of 77% of total AFF exports.

In 2018, **edible fruits and nuts** remained the leading product grouping with an exported value of R48.74 billion and a product grouping share of 27.50% of South Africa's AFF exports. The product grouping had an annual growth rate of 7.95% in value term, from 2017 to 2018. The main export products by the product grouping were fresh or dried citrus fruits, fresh or dried grapes, fresh apples, pears and quinces. The top three destination markets were the Netherlands, the United Kingdom and China.

**Beverages, spirits and vinegar** was the second largest exporting product grouping with an exported value of R18.74 billion and a product grouping share of 10.57% of South Africa's AFF exports. From 2017 to 2018, the beverages, spirits and vinegar exports growth rate increased by 6.39% per annum. The main beverages from the product grouping were wine and ethyl alcohol. The top three destination markets for the product grouping were the United Kingdom, Namibia and Germany.

**The wood pulp** product grouping was the third largest with an exported value of R12.07 billion and a product grouping share of 6.81% of South Africa's AFF exports. The product grouping had a negative growth rate of 3.74% per annum from 2017 to 2018. The main export products by this product grouping were dissolving and non-dissolving grades of chemical wood pulp

and waste & scrap of paper and paperboard. The top three destination markets for the sector were China, India and Indonesia, respectively.

**The paper, paperboards and articles** product grouping was the fourth largest, with an exported value of R9.11 billion and a share of 5.14% of South Africa's AFF exports. From 2017 to 2018, the value of exports increased by 9.94% per annum. The main export products from this product grouping were Kraft paper and paperboards, cartons and paper for writing. The three largest destination markets were Namibia, Zimbabwe and Botswana, respectively.

The fifth largest exporting industry was the **prepared vegetables, fruits and nuts** with an exported value of R8.90 billion and a product grouping share of 5.02% of South Africa's total AFF exports. There was a positive export growth rate of 12.86% per annum from 2017 to 2018. The main products exported by the product grouping were fruit and vegetable juice, prepared frozen vegetables and prepared fruits & nuts. The top market destinations were the Netherlands, Botswana and Namibia.



## 2. Analysis of South Africa's major suppliers (imports) of agriculture, forestry and fisheries products in 2018

Table 4 on the next page shows the top 10 supplier markets of agriculture, forestry and forestry products to South Africa; with imported values, share in South Africa's AFF imports, the import growth rate from 2017 to 2018 and the top three products imported by South Africa from the partner countries.

**Table 4: South Africa's top 10 suppliers of agriculture, forestry and fisheries products in value during 2018**

Top 10 import markets	Imported value 2018 (Billion Rands)	Share in SA AFF imports (%)	Import growth 2017-2018 (%)	Top 3 products imported into major markets
<b>World</b>	129.45	100.00	10.31	
<b>Sub-total</b>	67.97	52.51		
United Kingdom	13.31	10.28	96.45	Unused postage Whiskies Printed books
Brazil	7.44	5.74	- 2.11	Frozen chicken cuts and edible offal Frozen Meat and chicken offal Chemical wood pulp
China	7.33	5.66	0.85	Animal guts, excluding fish Apple juice Peptones
Thailand	6.97	5.39	5.57	Semi or wholly milled rice Sardines Broken rice
Germany	6.46	4.99	19.18	Wheat and meslin Frozen meat of swine Paper and paperboard
Namibia	6.15	4.75	13.77	Live cattle Malt beer Live sheep
United States	6.11	4.72	- 0.69	Frozen chicken cuts and edible offal Frozen Meat and chicken offal Chemical wood pulp
Swaziland	5.62	4.34	3.64	Raw cane sugar, subheading Note 2 to chapter 17 Raw cane sugar, not elsewhere specified or included Refined cane or beet sugar
Argentina	4.67	3.61	- 11.27	Soybean oilcake Wheat and meslin Refined soybean oil

Top 10 import markets	Imported value 2018 (Billion Rands)	Share in SA AFF imports (%)	Import growth 2017-2018 (%)	Top 3 products imported into major markets
France	3.91	3.02	25.68	Grape brandy Sparkling wine Animal feed preparation, except dog and cat food

Source: Global Trade Atlas, 2018

## 2.1. Import market analysis

In 2018, **the United Kingdom** was reported South Africa's largest supplier of agriculture, forestry and fisheries products with the value of R13.31 billion and a share of 10.28% of South Africa's total AFF imports. From 2017 to 2018, South Africa's import of AFF products from the United Kingdom sharply increased by 96.45% per annum. The main three products that South Africa imported from the United Kingdom were unused postage, whiskies and printed books.

**Brazil** that held the first position on the rank in 2017 moved down the rank to the second largest supplier with the value of R7.44 billion and a share of 5.74% of South Africa's AFF imports. From 2017 to 2018, annual imports shrank at a rate of 2.11%. The three major products imported from Brazil were frozen chicken cuts, frozen meat and chicken offal and chemical wood pulp.

**China** was the third largest supplier of agriculture, forestry and fisheries products to South Africa with the imported value of R7.33 billion and a share of 5.66% of South Africa's AFF imports. South Africa's import from China had a growth rate of 0.85% per annum. The main products imported by South Africa were animal guts, apple juice and peptones.

**Thailand** maintained the position the fourth largest supplier of agriculture, forestry and fisheries products with the value of R6.97 billion and a share of 5.39% of South Africa's AFF imports. From 2017 to 2018, South Africa's import of AFF products from Thailand increased by 5.67% per annum. The main three products from Thailand were wholly or semi-milled rice, sardines and broken rice.

**Germany** was the fifth largest supplier of agriculture, forestry and fisheries products with a value of R6.46 billion and a share of 4.99% of South Africa's AFF imports. From 2017 to 2018, imports grew at 19.18% per annum. The main three products from Germany were wheat and meslin, frozen meat of swine and paper & paperboards.

Table 5 below gives a picture of growing and declining suppliers of agriculture, forestry and fisheries products for South Africa during 2018. The selection on table 5 looks at SA's import suppliers that had an import value greater or equal to one billion Rand. The top three growing import markets were an unidentified country, Russia, the United Kingdom and Zimbabwe. The top three shrinking import markets were Argentina, Indonesia and Belgium.

**Table 5: South Africa's growing and declining suppliers (imports) of agriculture, forestry and fisheries products in 2018**

<b>Growing import markets during 2018</b>						
<b>Ranking</b>	<b>Top 3 growing markets</b>	<b>Values (Billion Rands)</b>	<b>Import growth (%)</b>	<b>Top 3 products driving import growth and their individual growth percentage</b>		
1	Unidentified country	1.10	530.39	Unused postage (542.13%)	Printed books (932.01%)	
2	Russia	3.19	100.62	Wheat and muslin (79.74%)	Newsprint (762.87%)	Chemical wood pulp (152.11%)
3	United Kingdom	13.31	96.45	Unused postage (309.43%)	Food preparations (153.28%)	Coffee extracts (10.43%)
4	Zimbabwe	2.24	69.53	Tobacco (31.96%)	Unused postage (650.56%)	Fermented black tea (18.50%)
<b>Shrinking import markets during 2018</b>						
<b>Ranking</b>	<b>Top 3 shrinking markets</b>	<b>Values (Billion Rands)</b>	<b>Import shrinkage (%)</b>	<b>Top 3 products driving import shrinkage and their individual shrinkage percentage</b>		
1	Argentina	4.67	- 11.27	Soybean Oilcake (-16.47%)	Refined soybean oil (-52.94%)	Frozen shrimps and prawns (-9.38%)
2	Indonesia	3.73	- 10.80	Refined palm oil (-10.66%)	Palm kernel or babassu oil (-20.73%)	Cocoa butter (-18.71%)
3	Belgium	1.62	- 8.89	Paper and paperboards (-4.10%)	Active yeasts (-0.60%)	Frozen vegetables (-2.75%)

Source: Global Trade Atlas, 2018

In 2018, imports of unused postage and printed books from an unidentified country recorded annual import growth rates of 542.13% and 932.01%, respectively. Imports of newsprint from Russia, unused postage from Zimbabwe and the United Kingdom, also recorded high annual import growth rates. Refined soybean oil from Argentina, palm kernel oil and refined palm reported a higher declining rate in imports from 2017 to 2018.

## 2.2. Imports analysis by product grouping level (HS2) during 2018

Table 6 below shows the imported value per industry, the product grouping share, percentage growth or decline of the product grouping from 2017 to 2018, the top three products imported in the respective product grouping and the top three import markets of agriculture, forestry and fisheries products for South Africa.

**Table 6: South Africa's top 10 major agriculture, forestry and fisheries import product groupings by value during 2018**

Product grouping description	Imported value (Billion Rands)	Share in SA total AFF imports (%)	Product grouping growth (%)	Top 3 products imported within the product grouping	Top 3 import markets by value
<b>HS49</b> Printed books, newspapers and manuscripts	15.39	11.89	153.17	Unused postage, Books and similar printed matter, Printed matter, not elsewhere specified	United Kingdom, Unidentified country, Switzerland
<b>HS 48</b> Paper, paperboard and articles	14.16	10.94	16.99	Paper and paperboard, Coated paper and paperboard, Uncoated paper for writing	Germany, China, Finland
<b>HS 10</b> Cereals	13.07	10.10	- 3.36	Rice, Wheat and meslin, Maize corn	Thailand, Russia, India
<b>HS 02</b> Meat and edible meat offal	9.14	7.06	1.42	Fresh, chilled or frozen meat and edible offal, Fresh, chilled or frozen meat of swine (pork), Edible offal, bovine, swine, sheep, goat, horse	Brazil, United States, Germany
<b>HS 15</b> Animal or vegetable fats, oils and waxes	8.77	6.78	- 13.67	Modified palm oil and its fractions, Sunflower-seed oil, Soybean oil and its fractions	Indonesia, Malaysia, Netherlands
<b>HS 22</b> Beverages, spirits and vinegar	8.07	6.23	19.65	Ethyl alcohol, Beer made from malt; Sweetened waters	United Kingdom, France, Namibia
<b>HS 17</b> Sugars and sugar confectionary	5.76	4.45	- 30.43	Cane or beet sugar, Cane confections, Sugar not elsewhere specified	Eswatini, Brazil, China

Product grouping description	Imported value (Billion Rands)	Share in SA total AFF imports (%)	Product grouping growth (%)	Top 3 products imported within the product grouping	Top 3 import markets by value
<b>HS 23</b> Food industry residues	5.45	4.21	- 0.93	Animal feed preparations, Soybean oilcake, Flour meal	Argentina, Netherlands, France
<b>HS 44</b> Wood, articles of wood and wood charcoal	5.03	3.89	4.98	Sawn or chipped wood, Plywood, Fibreboard wood	Eswatini, China, Malaysia
<b>HS 21</b> Miscellaneous edible preparations	4.60	3.55	10.59	Food preparations not elsewhere specified, Extracts of tea, coffee or mate, Sauces	Germany, United States, United Kingdom

Source: Global Trade Atlas, 2018

The top 10 import product groupings were highly concentrated with a share of about 60.49% of total AFF imports.

In 2018, **printed books, newspapers and manuscripts** was the largest product group imported, with an imported value of R15.39 billion and a share of 11.89% of South Africa's total AFF imports. From 2017 to 2018, the product grouping's growth rate was 153.17% per annum. The top three products imported during this period were unused postage, books and similar printed matter and printed matter, not elsewhere specified. The top three suppliers were the United Kingdom, an unidentified country and Switzerland.

**Paper, paperboard and articles** was the second largest product group imported, with an imported value of R14.16 billion and a share of 10.94% of South Africa's total AFF imports. From 2017 to 2018, the product grouping's growth rate was 16.99% per annum. The top three major products imported during the reporting year were paper and paperboard, coated paper and paper for writing. The top three suppliers were Germany, China and Finland.

**The cereals** product grouping was the third largest product group imported, with an imported value of R13.07 billion and a market share of 10.10% of South Africa's total AFF imports. The product grouping reported a decline rate of 3.36% per annum between 2017 and 2018. The three major import products were rice, wheat & meslin and maize corn. The three main suppliers from this product grouping were Thailand, Russia and India.

The fourth largest product grouping of imports was **meat and edible meat offal** with R9.14 billion worth of imports and a share of 7.06% of total AFF imports. The product grouping grew at a rate of 1.42% between 2017 and 2018. The top three major products were 1.fresh, chilled or frozen edible offal, 2.pork and edible offal of bovine, sheep, horse, goat and 3.pigs (swine). The top three supplier partners were Brazil, United States and Germany.

**Animal and vegetable fats, oils and waxes** were the fifth largest product group imported, imported with a value of R8.77 billion and a share of 6.78% of South Africa's total AFF imports. The product group declined at 13.67% per annum from 2017 to 2018. The top three major products imported under this product grouping were modified palm oil and its fractions, sunflower-seed oil and soybean oil. The top three supplier partners were Indonesia, Malaysia and the Netherlands.