AGRICULTURE

Annual Trade Report

South Africa

2025

FEBRUARY 2026

Preface

South Africa's agricultural sector is a globally competitive, market-oriented industry that plays a pivotal role in driving rural development, food security, and shared economic prosperity in the country and the region. This growth, amongst other catalysts, is supported by access to various export markets. South Africa's agricultural industry plays a critical role in the country's economy, rural development, and food security. The sector accounts for 2.55% of the South African economy, but roughly 12% when accounting for a broader agro-processing value chain. In terms of employment, the sector accounts for roughly 6% of the labour market, which is about 960,000 people, and an additional 350,000 down the value chain. When considering the wider multipliers, the sector provides a meaningful contribution to the socio-economic development of South Africa.

About Agriculture South Africa (AgriSA)

Established in 1904, AgriSA is the largest federation of agricultural organisations in South Africa, representing commercial farmers across all commodities and provinces. Through its commodity chambers and provincial affiliates, AgriSA advocates for an inclusive, sustainable, economically viable and globally competitive agricultural sector that contributes to food security, job creation, and economic development. AgriSA serves as a central interface between producers and policymakers.

Methodology

About this report

This report analyses South Africa's agricultural trade performance for the calendar year 2025 and analysis was conducted over 2021-2025, covering all products classified under HS Tariff Chapters 124 (agriculture and agro-processing). All values are expressed in nominal South African Rand (ZAR) unless otherwise stated.

Data Source

Official customs data from the South African Revenue Service (SARS), accessed and analysed via the AgricultureSA.io analytical platform. Data represents recorded trade flows; informal cross-border trade is not captured.

Subsector Classification

Subsector	HS Tariff Chapters	Notes
Livestock	1–5, 16	Including Chapter 15 headings 1501–1506
Horticulture	6–8, 13–14, 20	Including Chapter 22 headings 2204–2206 (wine)
Agronomy	9–12, 17–19, 21, 23–24	Including remainder of Chapter 15 and 22 headings

Chapters 15 (animal/vegetable fats) and 22 (beverages) are split at the heading level between subsectors to ensure accurate classification.

Currency Context

The South African Rand averaged approximately R18.40/USD in 2025, compared to R16.30/USD in 2021, a depreciation of approximately 13%. The five-year nominal export growth of 53% therefore equates to approximately 30–35% in real USD terms. Both figures represent genuine and substantial growth. The distinction matters for international benchmarking and policy interpretation.

Limitations

SARS customs data is subject to revision delays of up to 12 months. Volume data, in metric tonnes, is not available for all tariff lines. This report therefore analyses trade by value, supplemented by industry volume estimates where available.

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Foreword

R341 million. Every day. This figure reflects the net foreign exchange generated daily by South African agriculture in 2025. A figure that positions agriculture alongside mining as a pillar of South Africa's foreign exchange generation, accounting for roughly 10% of South Africa's export earnings. Agriculture remains a cornerstone of South Africa's economic and strategic strength.

A decade of patient investment in citrus orchards across Limpopo and the Eastern Cape delivered its breakthrough season, propelling total agricultural exports to R266.3 billion and the trade surplus to a record R126.3 billion. Horticulture now generates more than 100% of the national agriculture trade surplus, a reality that should reshape how policymakers, investors, and the public think about farming.

This report provides a balanced, evidence-based assessment of the realities and factors shaping the sector. The sugar industry is undergoing a period of acute structural adjustment, placing approximately 85,000 rural jobs in KwaZulu-Natal at risk. The Foot-and-Mouth (FMD) disease outbreak that spread to eight of nine provinces in 2025, leading to a declared a national disaster in early 2026, has thus far costed an estimated R5.6 billion in lost livestock exports and has fundamentally altered the risk calculus for South Africa's protein sector. Simultaneously, the imposition of a 30% US tariff in August 2025 has negatively impacted the outlook for wine, grapes, and other exports entering the United States market.

AgriSA compiled this report to inform policy and strengthen the long-term competitiveness of our sector. It reflects progress and challenges across key markets, value chains, and policy environments. As an agriculture community we must consolidate our gains while confronting the constraints that limit our full potential. The question is no longer whether strategic investment is warranted, but whether it will be mobilised in time to secure long-term competitiveness.

Johann Kotzé

CEO, AgriSA

AgriCulture South Africa™

Executive Summary

South Africa's agricultural sector delivered a record performance in 2025, achieving strong export growth and significantly strengthening the nation's trade balance. Total agricultural exports reached R266.2 billion, representing an 8.8% increase from R246.4 billion in 2024, while imports grew modestly to R141.6 billion. This resulted in a trade surplus of R124.6 billion, a remarkable 16.4% improvement year-on-year and the highest agricultural trade balance on record.

This sustained five-year growth trajectory reflects the sector's resilience and expanding competitiveness. Since 2021, agricultural exports have increased by 53% from R174.3 billion, demonstrating the sector's capacity to capitalise on global market opportunities despite challenging macroeconomic conditions, currency volatility, logistical constraints, and evolving trade policies in key markets. While performance has been robust, it remains exposed to biosecurity risks, infrastructure bottlenecks, and distortions to the global trade system.

Horticulture remains the top driver of export growth. Citrus exports increased by 35.6% to R44.9 billion, reinforcing South Africa's position as the second-largest citrus exporter globally. Fresh grapes, apples, and pears also recorded strong gains, collectively propelling fruit exports to unprecedented levels.

The red meat industry initially indicated early signs of stabilisation in 2025, reflecting intensified disease management efforts and strengthened biosecurity measures following recent FMD disease outbreaks. However, persistent animal health challenges and the expansion of FMD to several provinces continue to constrain export market access, limiting the sector’s ability to realise its full export potential. Fish and seafood exports increased by approximately 30%, driven by strong demand in key international markets.

The agronomy sector experienced margin pressure from declining maize and sugar prices, despite resilient export volumes. Regional trade within Africa continued to strengthen, with exports to the continent reaching R94.4 billion, approximately 34% of South Africa’s total agricultural exports. This highlights the growing importance of African markets for staple and field crop trade. In the final quarter of 2025, Africa accounted for 53% of total agricultural export value. Neighbouring markets such as Zimbabwe, Mozambique, and Botswana remain central to South Africa's regional trade footprint, collectively accounting for over half of agricultural exports to the continent. Maize remains a cornerstone of intra-African trade flows, with South Africa as a leading supplier to markets in the Southern African region, underscoring its strategic importance for regional food security.

Looking ahead, future export growth will be supported by a progressively diversifying export portfolio, continued market development efforts, and growing demand from emerging destinations. This momentum will be reinforced by expanding intra-African trade and deeper regional integration, positioning South African agriculture for sustained, though carefully managed, growth in 2026.

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IN CONTEXT

SOUTH AFRICA'S NATIONAL AGRICULTURAL TRADE OVERVIEW

Key 2025 Trade Indicators

South African Agriculture Trade at a Glance. 2025.

TOTAL AGRICULTURAL EXPORTS

R266.3bn

▲ +8.1% YoY

TOTAL AGRICULTURAL IMPORTS

R141.6bn

▶ +1.6% YoY

TRADE SURPLUS (RECORD)

R124.7bn

▲ +16.4% YoY

NET FOREIGN EXCHANGE / DAY

R341m

★

Every single day

5-YEAR EXPORT GROWTH

+53%

R174.3B → R266.3B

~30-35% in USD terms

EXPORTS TO AFRICA

R94.4bn

▲ 35% of total | +76% 5yr

Horticulture
RECORD: Citrus increased by 35.6% to R44.9bn. Net surplus R128.1bn, this subsector contributes the most to the trade surplus.

Agronomy
MIXED: Maize -14.2% on price correction. Sugar now net importer. Processed foods growing. Structural deficit R9.0bn.

Livestock
RECOVERY: Fish +32–41%. Lamb +677% over 5 years. Dairy emerging. FMD national disaster threatens reversal.

South African agriculture earned a record R124.7 billion trade surplus in 2025, R341 million in net foreign exchange every day, surpassing the combined daily earnings of the gold and platinum mining sectors. The citrus plantings of a decade ago have now moved through the biological lag into a breakthrough production, generating 103% of the total trade surplus. The defining policy observations of 2025: horticulture generates more than 100% of the national agricultural trade surplus, a concentration of dependence that demands strategic investment in phytosanitary compliance, port logistics, and market diversification.

Source: SARS customs data via AgricultureSA.io.2025

Interpretation and Implications

South Africa's agricultural trade performance in 2025 reflects a consolidation of export-led growth, supported by sustained competitiveness in high-value horticultural and processed-food value chains. Strong export expansion, combined with moderate import growth, resulted in a record trade surplus and continued net foreign exchange generation. Five-year export growth confirms the structural strengthening of South Africa's agricultural export base, with performance remaining resilient in both regional and global markets. Africa continues to serve as a critical anchor market, supporting diversification and mitigating external demand volatility.

Trade outcomes in 2025 were increasingly shaped by a narrow set of high-performing subsectors, particularly within horticulture. While this strengthened short-term earnings, it also heightened exposure to phytosanitary, logistics, and market access risks. Performance in agronomy and livestock remained uneven, reflecting ongoing cost pressures, market volatility, and animal health constraints. Overall, the 2025 performance highlights a sector that is internationally competitive but structurally constrained. Sustaining growth will depend on protecting and diversifying market access, improving infrastructure reliability, and broadening the export base to reduce systemic vulnerability.

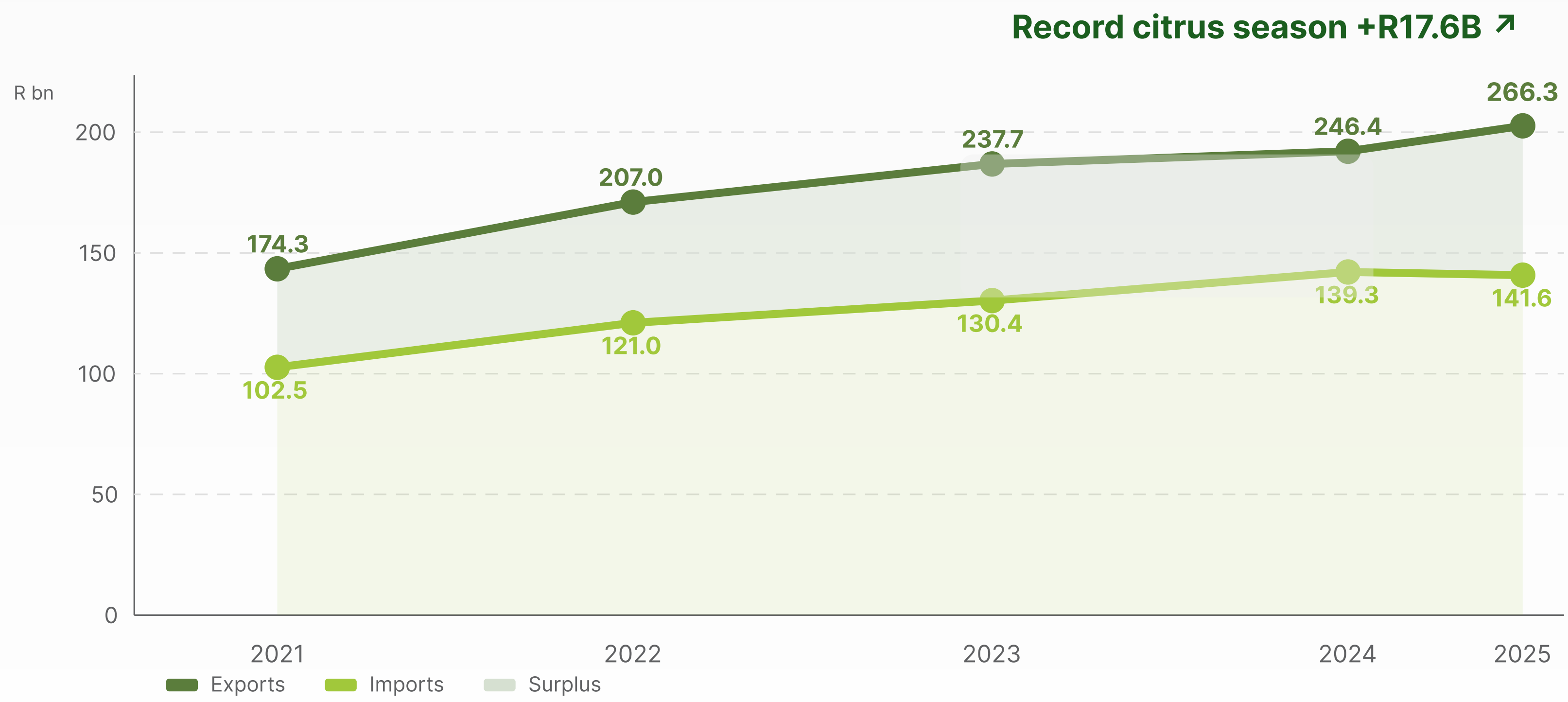
Trade Balance: Five Years of Structural Transformation

From R71.8 Billion to R124.6 Billion: How Agriculture Became South Africa's Foreign Exchange Engine

South Africa's agricultural trade surplus expanded from R71.8 billion in 2021 to a record R124.6 billion in 2025, confirming the sector's growing role as a source of foreign exchange. However, this growth followed a non-linear trajectory shaped by climatic shocks, commodity price cycles, and structural shifts in production.

South Africa's Agricultural Trade Surplus (2021–2025)

Total agriculture Exports, Imports, and Net Balance
Values in R billion
Source: SARS



Between 2021 and 2023, the surplus increased steadily, supported by elevated global commodity prices. Momentum weakened in 2024 before strengthening decisively in 2025.

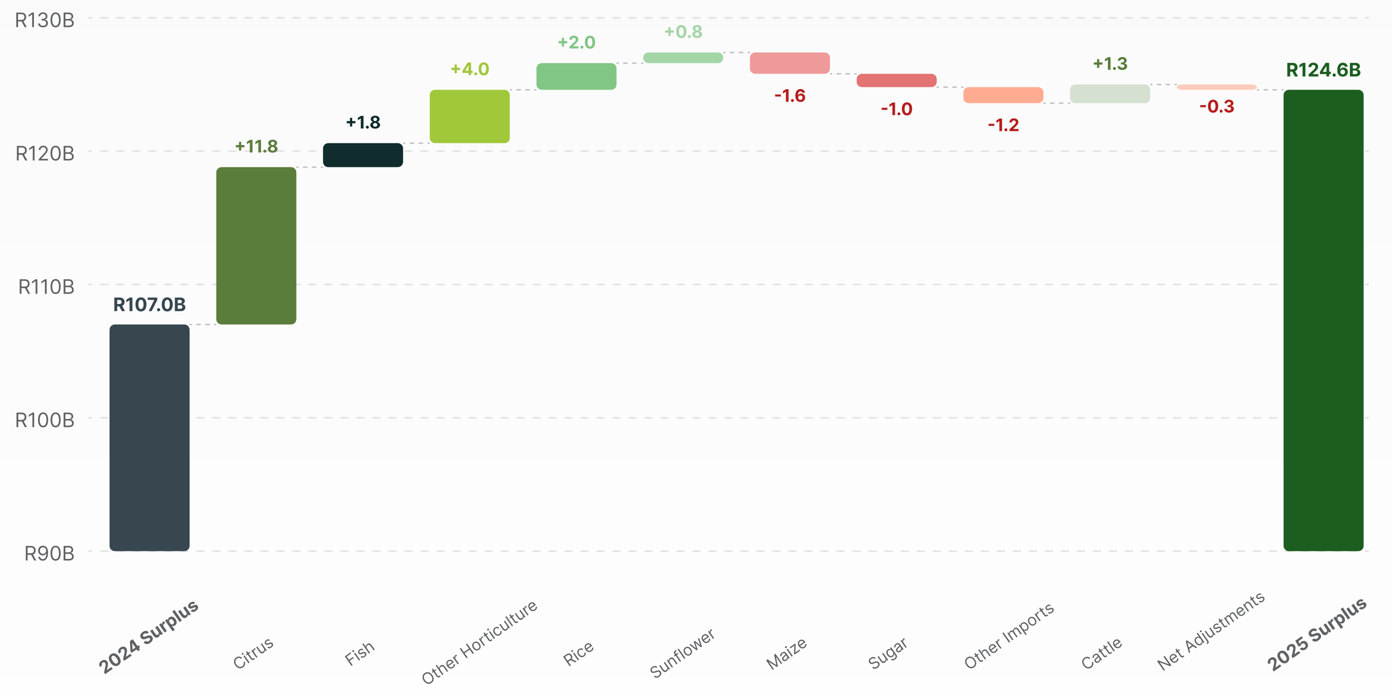
Momentum weakened in 2024, when the surplus plateaued at approximately R107 billion. An El Niño-driven production disruption in agronomy reduced maize and soybean exports by an estimated R10 billion, while import growth accelerated. As a result, export gains were largely offset by rising import demand, limiting further expansion of the surplus.

In 2025, the trade balance strengthened decisively. The citrus planting expansion initiated from 2010 onwards reached full commercial maturity, delivering a record export season and contributing an estimated R17.6 billion in additional export earnings. This supply-side expansion, combined with relatively restrained import growth, enabled the surplus to break through the previous plateau and reach a new high.

Overall, the five-year trajectory reflects three distinct phases: post-pandemic recovery and growth (2021 - 2023), climatic and structural disruption (2024), and export-led consolidation (2025). The data highlights the increasing importance of horticulture in sustaining national trade performance, while also reinforcing the vulnerability of the surplus to climate shocks and logistical challenges. Sustaining future gains will depend on strengthening climate resilience in agronomy, protecting and diversifying horticultural market access, and maintaining efficient logistics and border systems to support export competitiveness.

Decomposition of the R17.6 Billion Surplus Expansion

Analysis of Surplus Growth in 2024–2025. Source: SARS



Citrus contributed R11.8 billion, 67% of the surplus expansion, making it the most significant single-commodity contribution to agricultural trade surplus growth in the period under review.

Decomposition of the R17.6 Billion Surplus Expansion

The agriculture surplus growth between 2024 and 2025 highlights the central role of horticultural expansion in driving recent trade performance. Citrus exports alone contributed an estimated R11.8 billion, accounting for approximately 67% of the total surplus expansion, making citrus the most significant single commodity contribution to agriculture trade balance growth during the period under review. More broadly, the 2025 growth profile reflects a structurally stronger foundation than earlier post-pandemic gains. Approximately 40% of export growth was volume-driven, primarily through citrus maturation and recovery in fisheries output. This contrasts with the 2022 period, when export growth was heavily influenced by temporary global price spikes following the Russian-Ukraine conflict.

Exchange rate movements contributed an estimated 15% to export growth, while improved market access including expanded lamb exports to the Middle East and increased shipments to BRICS-aligned destinations such as Russia accounted for a further 15%. The maturing citrus supply pipeline contributed approximately 35% to growth, reinforcing the importance of long-term investment cycles in shaping trade outcomes.

In contrast, price effects were net negative in 2025, reflecting the easing of global maize and sugar prices. This indicates that recent surplus gains were driven primarily by real production and market expansion rather than by favourable external pricing conditions.

Implications for Trade Resilience

The composition of surplus growth suggests that South Africa's recent trade performance rests on relatively sound structural foundations. Volume-led export growth and sustained investment in high-performing value chains enhance the durability of earnings over the medium term.

However, the experience of 2024 demonstrates the system's vulnerability to climate-related shocks. A single adverse agronomy season was sufficient to offset significant horticultural gains, temporarily halting surplus expansion. Thus, the 2024 plateau demonstrated that a single adverse agronomy season can erase more than a year of horticultural progress, indicating the fragility of a surplus increasingly concentrated in a single high-performing value chain.

Climate models indicate a high probability of severe El Niño conditions in 2026/27, which could simultaneously suppress domestic production and intensify regional demand pressures, placing the trade balance under strain from both supply and demand channels.
Strengthening resilience will therefore require continued investment in three priority areas:

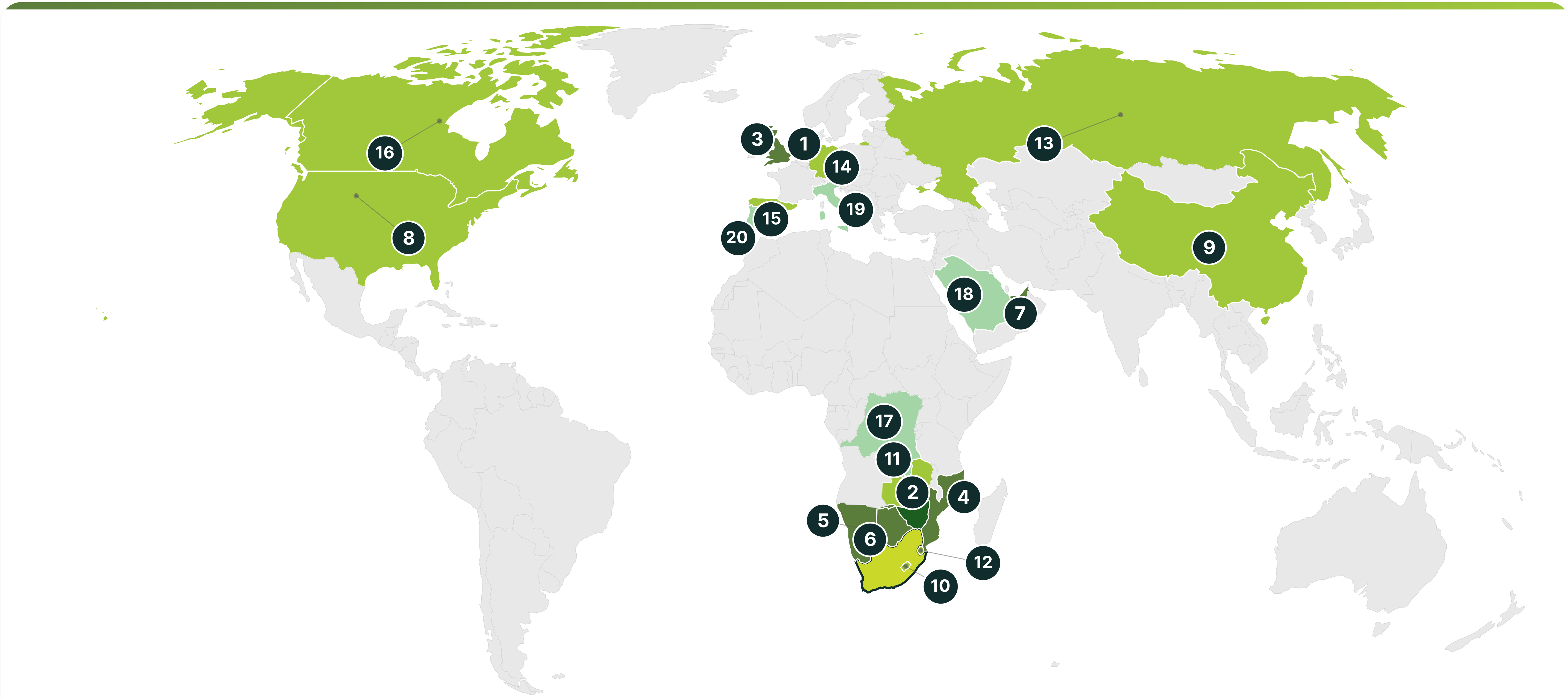
- Enhanced phytosanitary systems to protect horticultural market access
- Accelerated port and logistics reform to support a perishable-goods-dominated export profile
- Sustained market diversification to reduce dependence on a narrow set of destinations and commodities

The three outlined priority areas are all underway in South Africa, but unevenly and not yet at the scale required.

The South African Export Destination Landscape

Top 20 Trade destinations for South African Agricultural Produce

South Africa's agricultural exports in 2025 were concentrated in twenty priority markets across Africa, Europe, Asia, and North America, reflecting both regional depth and growing global reach.



>R20bn | R10-20bn | R5-10bn | R1-5bn | Other

1	**Netherlands**	R33.2bn	**+14.8%**
2	**Zimbabwe**	R20.1bn	**-1.0%**
3	**UK**	R19.8bn	**+14.0%**
4	**Mozambique**	R15.6bn	**+21.0%**
5	**Namibia**	R14.3bn	**-4.4%**
6	**Botswana**	R14.0bn	**-5.9%**
7	**UAE**	R11.4bn	**+15.9%**
8	**USA**	R9.6bn	**-5.8%**
9	**China**	R8.7bn	**-10.1%**
10	**Lesotho**	R8.0bn	**+2.3%**
11	**Zambia**	R7.3bn	**+6.6%**
12	**Eswatini**	R7.1bn	**+8.4%**
13	**Russia**	R6.6bn	**+36.6%**
14	**Germany**	R5.6bn	**+17.6%**
15	**Spain**	R5.4bn	**+32.4%**
16	**Canada**	R5.1bn	**+21.1%**
17	**DR Congo**	R4.3bn	**+1.6%**
18	**Saudi Arabia**	R3.6bn	**+21.7%**
19	**Italy**	R3.4bn	**+0.8%**
20	**Portugal**	R3.0bn	**+34.8%**

Source: SARS Customs Data via AgricultureSA.io for the period 2024–2025. Values in R Billion.

South Africa's 2025 Top 20 Agriculture Export Destinations

Value in R Billion. YoY Growth. Source: SARS

#	Country	Exports	YoY	Imports	Net	5 Year Growth	Export Bar
1	Netherlands	33.2	+14.8%	3.5	+29.7		
2	Zimbabwe	20.1	-1.0%	1.9	+18.2		
3	United Kingdom	19.8	+14.0%	3.5	+16.3		
4	Mozambique	15.6	+21.0%	2.1	+13.5		
5	Namibia	14.3	-4.4%	4.1	+10.2		
6	Botswana	14.0	-5.9%	0.4	+13.6		
7	UAE	11.4	+15.9%	0.4	+11.0		
8	United States	9.6	-5.8%	5.0	+4.6		
9	China	8.7	-10.1%	9.3	-0.6		
10	Lesotho	8.0	+2.3%	0.8	+7.2		
11	Zambia	7.3	+6.6%	0.8	+6.5		
12	Eswatini	7.1	+8.4%	9.2	-2.1		
13	Russia	6.6	+36.6%	2.0	+4.6		
14	Germany	5.6	+17.6%	3.8	+1.8		
15	Spain	5.4	+32.4%	2.9	+2.5		
16	Canada	5.1	+21.1%	1.1	+4.0		
17	DR Congo	4.3	+1.6%	<0.1	+4.3		
18	Saudi Arabia	3.6	+21.7%	0.1	+3.5		
19	Italy	3.4	+0.8%	3.0	+0.4		
20	Portugal	3.0	+34.8%	0.2	+2.8		

Bar colour indicates region: Europe, Africa, Americas, Middle East, Russia/CIS, Bilateral deficit (Eswatini), China

Emerging growth markets

Russia recorded the strongest growth among major destinations, as rising demand from non-EU markets created new access opportunities for South African products. Saudi Arabia continued to expand, supported primarily by sustained halal lamb demand.

Markets under pressure

China declined amid domestic economic slowdown and ongoing sanitary and phytosanitary (SPS) frictions. The United States remains strategically important but faces renewed headwinds following the introduction of a 30% tariff.

Case Study: The Eswatini Trade Balance under SACU

South Africa-Eswatini Agricultural Trade Balance (2025)

Net Deficit of R2.1 Billion Driven by Regional Sugar Trade. Source: SARS

SOUTH AFRICA
Exports to Eswatini
R7.1bn
Maize R0.8bn
Beverages R0.4bn
Soybeans R0.3bn

R7.1bn →
← R9.2bn
Net: -R2.1bn

ESWATINI
Exports to South Africa
R9.2bn
Sugar R5.2bn (56%)
Other sugars R0.9bn
Confectionery R0.9bn
Pasta R0.8bn

Sugar under tariff heading 1701 alone accounted for approximately R5.2 billion, representing 56% of all agricultural imports from Eswatini.

The Eswatini Trade Balance under SACU: Structural Drivers

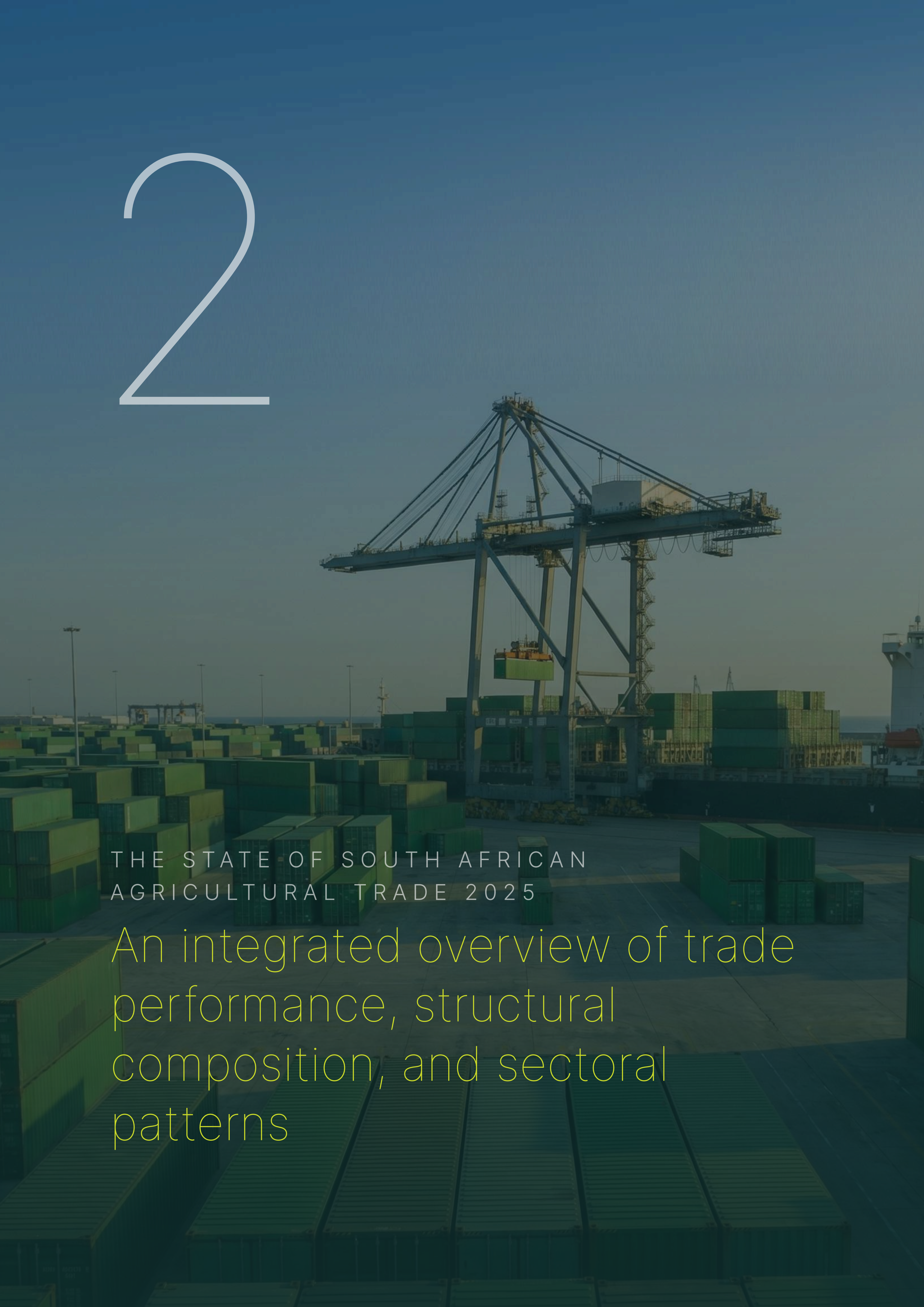
South Africa's bilateral agriculture trade with Eswatini presents a distinctive pattern within the top 20 export destinations. In 2025, Eswatini was the only major partner with which South Africa recorded a net agricultural trade deficit, reflecting the structure of the Southern African Customs Union (SACU) sugar economy.

Total agricultural exports to Eswatini amounted to R7.1 billion, dominated by maize, beverages, and oilseeds. Imports from Eswatini reached R9.2 billion, resulting in a net deficit of R2.1 billion, driven primarily by sugar products. This trade pattern reflects the regional organisation of sugar production and refining within SACU. As domestic cane growing areas in South Africa have declined from approximately 430,000 hectares to between 350,000 and 370,000 hectares, refineries have become increasingly reliant on regional supply, particularly from Eswatini.

Continued conversion of cane land to higher-value crops such as macadamias and avocados is likely to reinforce this trend. At the same time, South Africa's substantial exports to Eswatini reflect the dominance of South African food retailers and processors in the formal Eswatini market. Per capita agricultural exports to Eswatini remain among the highest in the region, highlighting deep commercial integration.

Overall, the bilateral deficit reflects structural regional integration rather than competitiveness weaknesses. It illustrates how SACU market arrangements, production shifts, and value-chain organisation shape trade outcomes within Southern Africa.

“South African agriculture
totals R729 million in agricultural products every day.”



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THE STATE OF SOUTH AFRICAN AGRICULTURAL TRADE 2025

An integrated overview of trade performance, structural composition, and sectoral patterns

Trade Performance Overview

Understanding the 53% Growth: Nominal and Real Trends over Five Years

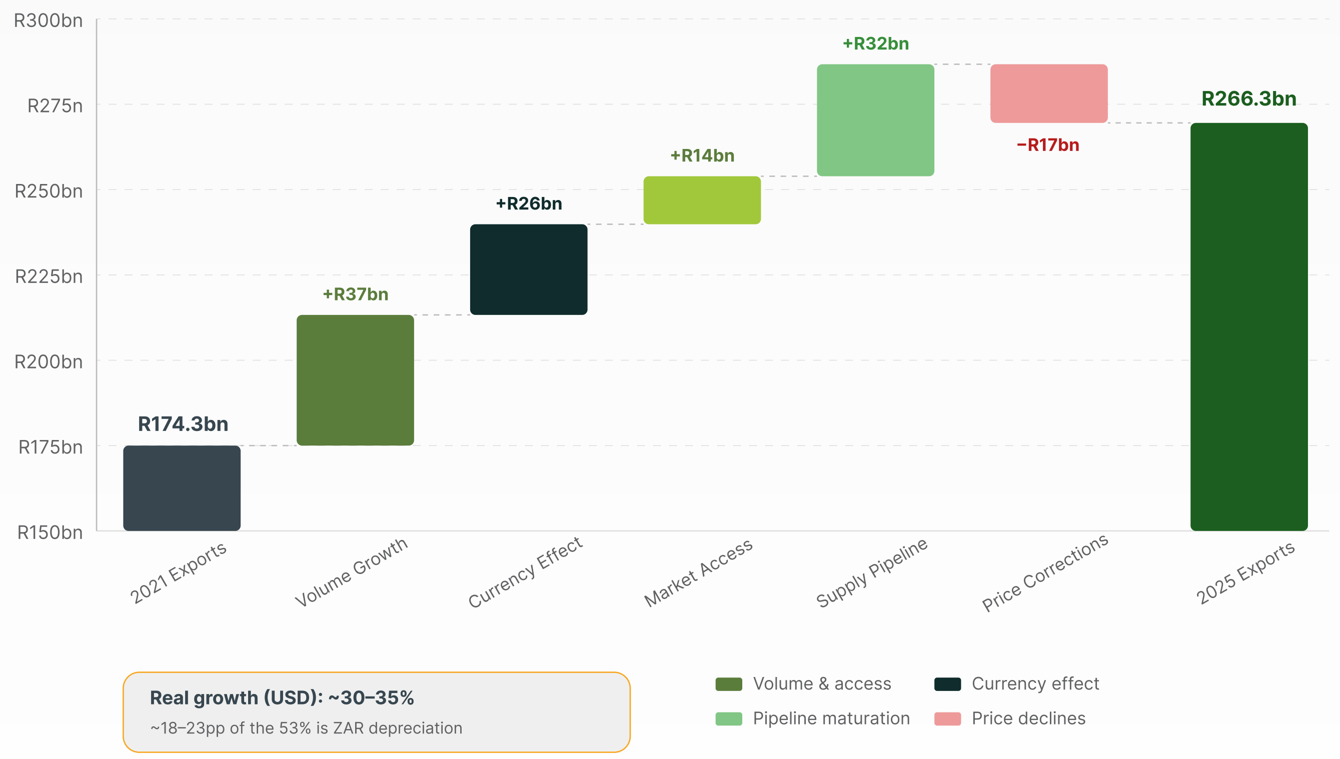
> *South Africa's agricultural exports expanded by 53% over the past five years. However, approximately 18 - 23% of the recorded growth reflects exchange-rate effects rather than underlying production and competitiveness gains. In real, inflation- and currency-adjusted terms, export growth is estimated at 30–35%.*

This distinction is critical. Real growth provides a more accurate measure of structural performance, as it reflects durable improvements in output, market access, and value-chain efficiency, rather than temporary currency-driven effects. It therefore offers a clearer indication of the sector's long-term competitiveness and resilience.

Structural and Market Drivers of 53% Export Growth

Five-Year Growth in Agriculture Exports for the period 2021–2025

From R174.3bn to R266.3 billion. Source: SARS



Approximately 18–23 percentage points of the headline 53% five-year export growth is attributable to ZAR depreciation. In constant currency terms, genuine export growth was approximately 30–35%.

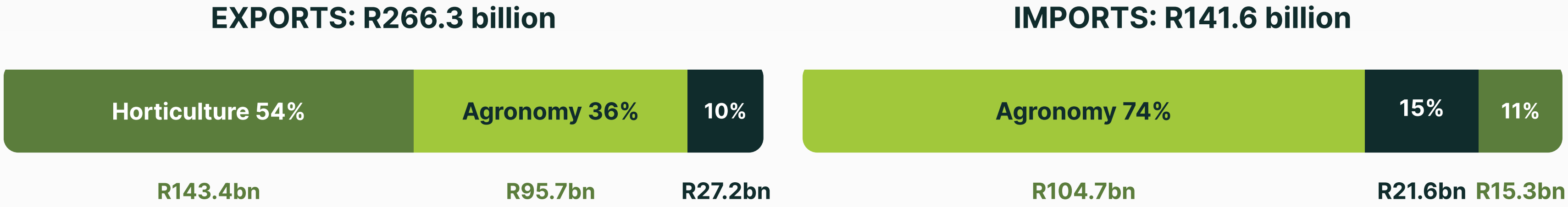
Implication

The growth decomposition reveals that 2025 export growth was more structurally durable than 2022-2023 growth, which was heavily amplified by commodity price spikes that have since unwound. Volume-driven growth, principally citrus maturation and fish recovery, compounds over time. The five-year trajectory was not a smooth ascent: from 2021 to 2023, the surplus increased from R71.8 billion to R107.3 billion, then plateaued as the 2023/24 El Niño drought wiped R10 billion from soybean and maize exports. The 2025 breakout was powered by the citrus performance, which added R11.8 billion while import restraint returned across rice, sunflower oil, and live cattle.

The distinction between nominal and real growth extends beyond a technical distinction. Real export growth of 30-35% represents a credible achievement by international standards. However, the 53% headline figure, if taken at face value, risks obscuring the urgency of persistent structural challenges, including port and logistics constraints, the need to diversify market access, and the growing concentration of surplus generation within a single high-performing value chain.

Structural Imbalance: Horticulture Exports and Agronomy Imports

Sectoral Trade Contrast: Horticulture and Agronomy. ZAR Billion. Source: SARS



Exports

Horticulture: Citrus R44.9bn, grapes R20.4bn, nuts R12.8bn, wine R10.1bn

Agronomy: Maize R13.5bn, sugar R6.2bn, food preps R5.8bn, soybeans R4.6bn

Livestock: Fish R14.2bn, bovine R2.7bn, poultry R1.8bn, lamb R1.2bn

Imports

Horticulture: Fruit juice R3.8bn prepared vegetables R2.4bn

Agronomy: Palm oil R10.4bn, wheat R10.6bn, rice R9.7bn, sugar R6.6bn

Livestock: Poultry R12.8bn, fish R4.2bn, bovine offal R2.1bn

The trade structure reflects a pronounced structural imbalance. Horticulture accounts for approximately 54% of export value while representing only 11% of agricultural imports. In contrast, agronomy contributes just 36% of exports but accounts for 74% of imports. This imbalance underpins the sector's overall trade outcome and is a central driver of the R124.6 billion agricultural trade surplus.

The import profile in this visual reflects a structural dependency that is largely unavoidable. Approximately R30.7 billion agricultural imports represent a permanent baseline, driven by wheat (R10.6 billion), palm oil (R10.4 billion), and rice (R9.7 billion). These are commodities that cannot be produced at scale under South African climatic and geographic conditions. Within agronomy, a notable structural shift has emerged: sugar became a net importer for the first time in 2025, with imports totaling R6.6 billion exceeding exports by approximately R400 million.

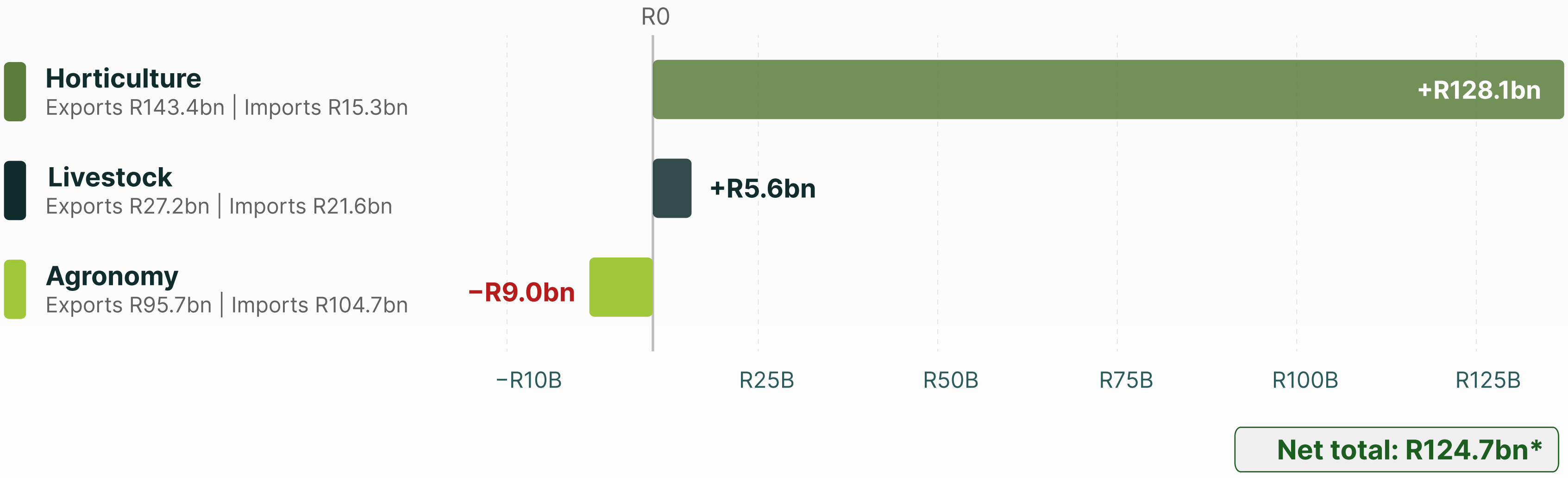
Implication

This structural import baseline is expected to expand as population growth and changing dietary patterns increase. Sustaining the current trade surplus will therefore require export growth to consistently outpace this underlying drag. Priority responses include accelerating horticultural expansion, scaling agro-processing for regional markets, and safeguarding existing market access.

> *Horticulture is not simply a contributor to South Africa's agricultural trade surplus; it is its primary foundation. The combined balance of the other major subsectors remains in deficit. Without the contribution of orchards, vineyards, and packhouses, South Africa's agricultural trade position would shift from surplus to a structurally embedded deficit.*

Diverging Trade Positions across Agricultural Subsectors

Net Trade Balance by Subsector in 2025. ZAR Billion. Source: SARS



**Horticulture alone generated a net surplus of R128.1 billion, exceeding the total agricultural trade surplus.This was partially offset by an agronomy deficit of R9.0 billion, driven primarily by palm oil and wheat imports. Minor differences between subsector totals and the aggregate surplus of R124.7 billion is due to rounding in category-level allocations.*

Livestock's R5.6 Billion surplus represents one of the most dynamic developments in recent subsector performance. Growth was driven primarily by fisheries exports, with hake fillets reaching R3.7 billion (+31.8%) and frozen fish R2.8 billion (+40.7%). Lamb exports also expanded sharply, rising by 677% to R1.16 billion, reflecting the combined effects of improved market access, favourable exchange rates, and strengthened product reputation. However, this recovery remains highly dependent on effective animal health management. The FMD outbreak, declared a national disaster after spreading to eight of nine provinces, poses a material risk to market access and threatens to reverse recent gains.

Implication

With more than 100% of the agricultural trade surplus originating from a single subsector, phytosanitary and animal health investment is not merely a sectoral concern but a macroeconomic priority. Strategic focus should therefore prioritise safeguarding horticultural exports, consolidating livestock growth, and stabilising agronomy performance.

A record trade surplus does not mean there is no risk. It means the risks have not yet materialised at scale. When the five largest structural exposures total R40-55 billion in potential annual losses, the question is not whether the surplus is real but whether it could be strategically safeguarded.

Risk and Resilience in 2025 Agricultural Trade

Assessment of Structural Vulnerabilities and Protective Factors. Source: SARS, AgricultureSA.io Analysis

RISKS

EU Citrus Regulatory Exposure

R23–29bn

at stake in EU/UK citrus exports. MRL tightening, CBS dispute, and FCM interception thresholds could restrict access to the world's highest-value fresh fruit market.

Palm Oil Import Dependence

R10.4bn

100% imported from Indonesia/Malaysia. Zero domestic production capacity. Any supply disruption flows directly to food manufacturing costs across the value chain.

Transnet Logistics Drag

R4–10bn/yr

Port delays destroy perishable fruit shelf life. Container dwell times 3–5x global benchmarks. Rail decay forces grain onto road at R200–400/tonne premium.

RESILIENCE FACTORS

Africa Trade Anchor

R94.4bn

35% of total exports, +76% over 5 years. Continental trade provides a diversification buffer driven by retail expansion, urbanisation, and proximity advantages.

Lamb Breakout Platform

R1.16bn

Eightfold growth since 2021. Middle East halal market created from scratch. R2–3bn potential. Conditional on FMD containment and maintained market access.

Citrus Pipeline Maturity

R44.9bn

+35.6% growth. Orchards planted 2015–2020 are in peak bearing with 20–30+ years remaining. Volume growth will continue at 3–5% annually without new investment.

The current balance between risk and resilience remains cautiously favourable, however, it is increasingly tilted toward heightened vulnerability. Resilience factors are structural and relatively durable, while identified risks are manageable provided that timely and coordinated policy responses are implemented. Among these, exposure to EU citrus markets represents the most significant single concentration risk.

Two of the five major structural risks, namely FMD which led to the declaration of a national disaster in early 2026 after affecting eight of nine provinces, and the introduction of US tariffs on selected agricultural products, have already materialised. Other high-probability risks over the medium term include EU phytosanitary restrictions, concentration in palm oil supply chains, and ongoing deterioration in port and rail performance. While expanding African trade corridors and new export platforms offer meaningful diversification, they are not yet sufficiently scaled to offset the impact of major disruptions in key markets.

Implication

The five defensive priorities, namely: strengthened SPS systems, effective FMD containment, accelerated port and logistics reform, and enhanced trade diplomacy capacity, are foundational to maintaining export stability and are essential to the sustainability of the surplus.

3

SECTORAL DRIVERS OF AGRICULTURAL TRADE

Horticulture | Agronomy | Livestock

SECTORAL DRIVERS OF AGRICULTURAL TRADE

In 2025, South Africa's agricultural trade performance reflected increasingly divergent trajectories across major subsectors. Horticulture remained the principal growth engine, with strong citrus and table grape exports reinforcing the country's competitive position in counter-seasonal fresh produce markets. Agronomy, by contrast, faced renewed pressure as maize and sugar export values weakened amid softer global prices, increasing exposure to commodity market volatility. Livestock and poultry exports remained constrained by animal health restrictions, particularly related to FMD, resulting in only modest trade gains, despite continued expansion in fisheries exports.

On the import side, trade patterns continue to reflect uneven domestic production capacity across value chains. Structural reliance on wheat and palm oil imports highlights processing gaps and ecological limitations, while declining livestock imports point to a gradual strengthening of domestic poultry production. Together, these trends illustrate how sector-specific investment, regulatory capacity, and market access conditions shape trade outcomes. They also underscore the importance of sustained value chain development in supporting export diversification, import substitution where feasible, and long-term foreign exchange generation.

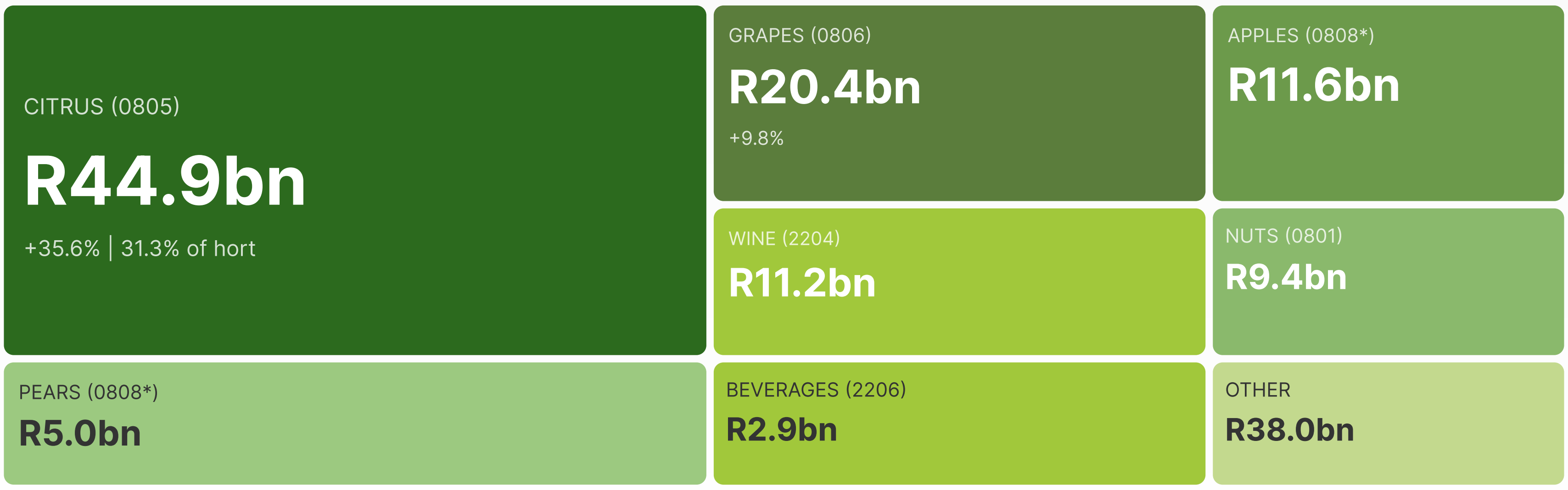
Horticulture: Main Export Driver

The Central Role of Horticulture in Sustaining the National Trade Surplus

> *Without the contribution of horticulture, South Africa's agricultural trade balance would have shifted into a persistent structural deficit over the past five years.*

Horticulture's Contribution to the Agricultural Trade Surplus

R143.4 Billion in Exports Accounting for Over 100% of Net Surplus. Source: SARS



*Citrus alone accounts for 31% of horticulture exports and approximately 17% of all agricultural exports. The export-to-import ratio of 9:1 is unmatched in any other subsector. *Apples and pears share the same HS chapter but differ on subheading level.*

The Citrus and Table Grape Growth Engine

Horticulture's strong export performance in 2025 was driven primarily by sustained expansion in citrus and table grape value chains. Citrus exports reached R44.9 billion, representing a 35.6% increase from the previous year and marking the culmination of a decade-long investment cycle. Between 2015 and 2020, planted citrus area expanded from approximately 77,000 hectares to 95,000 hectares, enabling the sector to meet rising international demand at scale. In 2025, the Citrus Growers Association reported packing of 203.4 million cartons, an increase of 22% year-on-year.

This production expansion was reinforced by strong demand from the European Union, Asia, and the Middle East, favourable growing conditions, and improved orchard productivity. As a result, South Africa consolidated its position as the world's second-largest citrus exporter, with significant growth in oranges, mandarins, and lemon exports.

Table grape exports also performed strongly, supported by South Africa's counter-seasonal production advantage, consistent quality standards, and diversified market access. Robust European demand, together with increasing penetration of Asian markets, underpinned export growth, while sustained investment in production and cold-chain systems in the Western Cape supported reliability and quality.
Together, citrus and table grapes formed the core of the horticulture export engine in 2025, reinforcing the subsector's role as the primary contributor to national trade performance. Their combined success reflects the long-term returns to coordinated investment, market development, and compliance with international standards, while highlighting the importance of maintaining these foundations to sustain future growth.

Top 10 Horticulture Exports: Five-Year Performance

Export Values in R Billion and Five-Year CAGR. Source: SARS

#	Tariff	Product	2025	YoY	CAGR	Trend 2021–2025
1	08051010	Fresh oranges	**16.9**	+25.3%	+10.9%	
2	08061000	Fresh grapes	**16.6**	+7.9%	+12.1%	
3	08052110	Fresh soft citrus	**13.7**	+32.1%	+18.1%	
4	08081000	Apples	**11.6**	+14.2%	+12.8%	
5	08055010	Fresh lemons	**9.2**	+53.7%	+17.0%	
6	08083000	Pears	**5.0**	+12.3%	+13.4%	
7	08062000	Dried grapes	**3.9**	+18.6%	+21.6%	
8	08026200	Macadamias (shelled)	**3.4**	+5.1%	+7.2%	
9	08104000	Blueberries	**3.0**	+8.4%	+7.8%	
10	08094000	Plums	**2.6**	+11.5%	+13.1%	

Every top 10 horticulture tariff line grew over five years. Lemons (+53.7% YoY) were the fastest-growing category; dried grapes posted the highest CAGR (+21.6%).

Grapes, Deciduous Fruit and Nuts

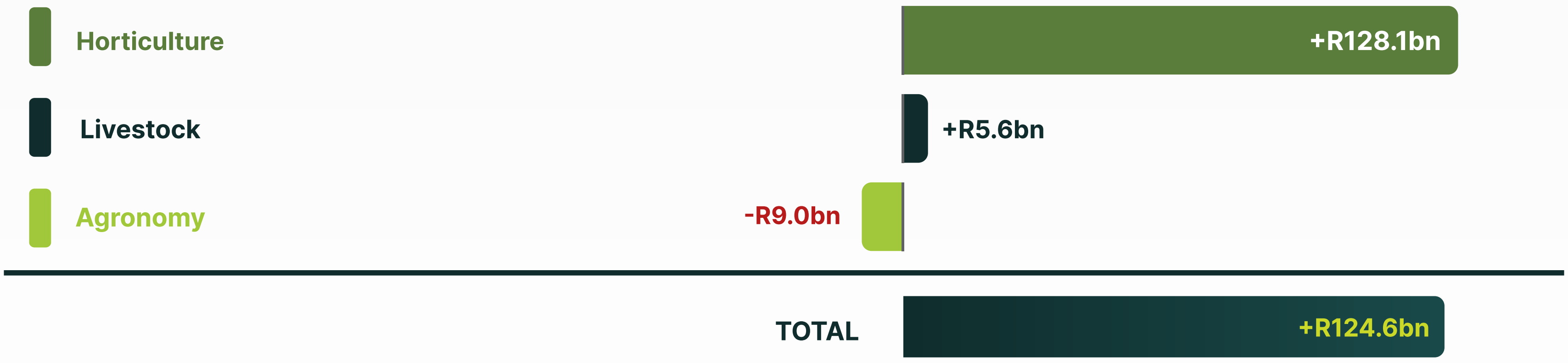
Fresh and dried grapes continued their premium growth trajectory in 2025, reaching R20.4 billion (+9.8%), supported by strong demand for proprietary varieties that command price premiums of 30-50% in key export markets. Apples and pears together contributed R16.6 billion, reinforcing South Africa's competitive position in temperate fruit exports. Nut exports also expanded rapidly, reaching R9.4 billion and recording 73% growth over five years, led primarily by macadamias. South Africa's position as the world's largest macadamia producer provides a strategic platform for further regional processing and value addition, with growing potential to deepen downstream integration.

Structural Imbalance within Horticulture Imports

Horticultural imports remained relatively limited in 2025, totaling approximately R15.3 billion. These were concentrated in a small number of products, notably apple juice concentrate (R1.7 billion), reflecting domestic processing demand, bananas (R1.1 billion), and counter- seasonal grape imports (R0.4 billion). As a result, the horticulture subsector maintained an exceptional export-to-import ratio of approximately 9:1, underscoring its uniquely strong net trade position relative to other agricultural value chains.

Horticulture Generates 103% of the Total Agricultural Trade Surplus

Subsector Net Trade Position in 2025. Values in R Billion. Source: SARS



Horticulture generates 103% of South Africa's agricultural trade surplus. The R128.1 billion net position means that fruit, nuts, vegetables, and wine alone exceed the total agriculture surplus of R124.6 billion.

Five-Year Subsector Net Position Trend

Year	Horticulture	Agronomy	Livestock	Total
2025	**+128.1**	**-9.0**	**+5.6**	**+124.6**
2024	+111.8	-6.0	+1.2	+107.0
2023	+100.3	+7.6	-0.7	+107.3
2022	+90.5	-1.1	-3.5	+85.9
2021	+82.7	-7.8	-3.1	+71.8

Implication

The reliance on citrus as the primary source of surplus generation creates single-commodity risk on a national scale. With approximately 35-40% of citrus exports destined for the European Union, any escalation in SPS restrictions or competitive pressure could place R10-20 billion in annual export revenue at risk.

CASE STUDY: THE CITRUS PLANTING WAVE

A Decade of Patience: How 18,000 Hectares Changed South Africa's Trade Profile

Between 2015 and 2020, South Africa's citrus planting area expanded from approximately 77,000 hectares to 95,000 hectares, reflecting the establishment of nearly 18,000 hectares of new orchards. This expansion represents an estimated R15-20 billion in private-sector investment in land preparation, planting material, irrigation systems, and packhouse infrastructure. These investments were made with a clear understanding of long production timelines. Citrus trees typically require four to six years to reach full commercial maturity. Under the coordination of the Citrus Growers Association, the industry adopted a long-term investment strategy grounded in structural demand growth and market development, rather than short-term price cycles.

2015–2020
INVESTMENT
18,000 ha planted
R15-20bn invested

→

2020–2024
MATURATION
Trees reach bearing
4-6 year cycle

→

2025
FULL PRODUCTION
203.4M cartons
+22% on 2024

→

R44.9bn
EXPORT VALUE
+35.6% YoY
Record

This strategy reached maturity in 2025. Citrus exports increased to R44.9 billion, making citrus the most valuable agricultural export in South Africa's history. More broadly, this performance illustrates the impact of patient, large-scale capital deployment, where private investment decisions taken a decade earlier translated into a measurable improvement in the national balance of payments. At the same time, significant production capacity remains in the pipeline. Orchards planted between 2019 and 2022 are still transitioning toward peak bearing, indicating that the current expansion cycle has not yet fully realised its potential.

Agronomy: Structural Risks and Constraints

Understanding Structural Vulnerability in South Africa's Grain and Sugar Trade

> *The 2025 data highlight agronomy's structural trade challenge, with the subsector recording a net import position of approximately R9.0 billion.*

Top 10 Agronomy Exports: Volatility Beneath the Surface

Values in R billion. Five-year trend from 2021-2025. Source: SARS

#	Tariff	Product	2025	YoY	CAGR	Trend
1	10059090	Maize	**11.1**	-12.3%	+10.5%	
2	21069090	Food preparations	**3.1**	+13.1%	+16.2%	
3	17019900	Refined sugar	**3.0**	+34.9%	+12.1%	
4	17011400	Raw cane sugar	**2.8**	-39.2%	+5.1%	
5	12019000	Soybeans	**2.0**	+58.0%	+50.3%	
6	24022090	Cigarettes	**2.0**	+27.1%	+7.7%	
7	21039099	Sauces/condiments	**2.0**	+21.5%	+11.4%	
8	17049000	Sugar confectionery	**1.9**	+15.6%	+13.8%	
9	12099100	Vegetable seeds	**1.8**	+9.2%	+23.7%	
10	23040000	Soybean oil-cake	**1.8**	+6.2%	+11.5%	

Maize demonstrates high price elasticity; value-added products (food preparations, sauces, confectionery) deliver consistent compounding growth.

Maize and Value-Added Products

Maize exports in 2025 reflected a pronounced boom-and-bust cycle, with strong production volumes offset by declining global prices. While primary maize exports weakened, value-added food products, including preparations, sauces, and confectionery, continued to deliver steady, compounding growth, highlighting the stabilising role of downstream processing. At the HS heading level (HS 1005: Maize), total export values declined by 14.2% to R13.5 billion. The dominant subheading, HS 1005.90.90 (Maize, other than seed), accounted for R11.1 billion, with the remainder reflecting smaller categories including HS 1005.10 (Maize seed) and other maize classifications.

Domestic production recovered strongly to an estimated 16.3 million tonnes, indicating the sectors underlying supply strength. The decline in export value was driven almost entirely by price movements. International maize prices declined from above US$275 per tonne to approximately US$160-180 per tonne, compressing export revenues despite strong production. Regionally, Africa remained the principal destination, absorbing approximately 78% of maize exports (R10.5 billion), reinforcing the crops central role in regional food security and trade integration.

The R30.7 Billion Import Floor: Three Commodities South Africa Cannot Produce

Essential Imports without Domestic Production Alternatives. Source: SARS

WHEAT	PALM OIL	RICE
R10.6bn	R10.4bn	R9.7bn
+7.4% YoY	+13.2% YoY	-17.3% YoY
Self-sufficiency: 40-45% Declining 20+ years Russia emerging supplier	Domestic production: ZERO 100% Indonesia & Malaysia Most concentrated risk	Domestic production: negligible India restriction relief Structural dependency

This figure indicates a combined structural import baseline of R30.7 billion, which exceeds total agronomy net exports by a substantial margin

South Africa faces a combined structural import baseline of approximately R30.7 billion, reflecting essential commodities with no viable domestic substitutes. Within this profile, palm oil represents the most concentrated supply chain exposure in agricultural trade, with near-total reliance on two source countries for a critical input into domestic food manufacturing.

Value-Added Growth and Structural Upgrading

Beneath short-term commodity volatility, a gradual but significant structural shift is underway within agronomy. Processed food exports have continued to expand steadily, reflecting growing industrial capability and deeper value-chain integration. In 2025, food preparations reached R3.1 billion, sauces and condiments R1.9 billion, sugar confectionery R1.9 billion, and vegetable seeds R1.8 billion. Non-alcoholic beverages alone generated R4.0 billion in exports to African markets.

Collectively, these value-added categories now contribute an estimated R10-12 billion in annual export earnings, providing a more stable and resilient revenue base than primary commodities.

Soybean Expansion and Value-Chain Integration

Soybeans represent one of the most transformative developments within the agronomy subsector. Exports increased to R2.0 billion in 2025, reflecting cumulative growth from R260 million in 2021. Planted area expanded to approximately 1.15 million hectares, underpinning rising export capacity.

At the same time, soybean oil-cake exports reached R1.8 billion, signalling the emergence of a more integrated domestic oilseed value chain and strengthening linkages between primary production and processing.

Implication

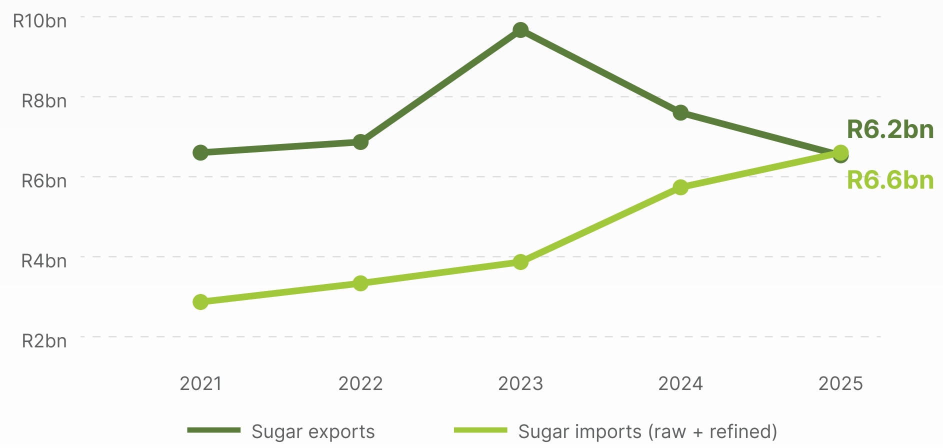
Agronomy's trade contribution remains highly sensitive to climatic conditions and global price cycles, with annual fluctuations of R5–10 billion linked primarily to maize performance. Policy emphasis should therefore shift from maximising primary commodity volumes toward accelerating value-added food manufacturing, particularly for African markets where urbanisation and income growth are driving sustained demand.

Sugar: Structural Realignment and Managed Adjustment

South Africa has entered a net sugar import position, with exports of R6.2 billion and imports of R6.6 billion in 2025. The crossing of declining export values and rising import volumes in 2024–2025 signals a deeper shift within the domestic sugar industry.

Structural Shift in Sugar Trade Balance for the period 2021-2025

HS 1701 Exports and Imports. R Billion. Source: SARS



The convergence of declining exports and rising imports in 2024–2025 reflects a structural turning point within the industry and highlights the need for coordinated policy and industry intervention.

The sugar industry's structural pressures are deeply entrenched. Sugarcane area has declined from approximately 430,000 hectares in the early 2000s to between 350,000 and 370,000 hectares in recent seasons, reflecting sustained shifts in land use. In KwaZulu-Natal, many growers have transitioned to macadamia and avocado orchards, which offer returns several times higher than sugarcane and require long-term investment commitments of 15 to 25 years.

Simultaneaously, domestic demand has been constrained by the Health Promotion Levy introduced in 2018, which is estimated to have reduced sugar consumption by 10–15%. Despite these pressures, the industry continues to support approximately 85,000 direct jobs, predominantly in rural communities, underscoring the social and economic importance of managing the transition in a balanced and coordinated manner.

Case Study: The Structural Transition of South Africa's Sugar Industry

Employment, Land Use Change, and Long-Term Adjustment Pressures

Export values declined to R6.2 billion, while imports increased to R6.6 billion, resulting in South Africa shifting into a net sugar import position of approximately R400 million. Part of this pattern reflects quality segmentation, with higher-grade domestic sugar directed to export and industrial markets and lower-cost imports supplying mass domestic consumption. However, the widening gap primarily reflects structural constraints on domestic production capacity rather than product differentiation alone.

HECTARES DECLINED	JOBS AT RISK	NET POSITION
~80,000 ha	**85,000**	**-R0.4bn**
430K to 350-370K ha	1M+ livelihoods	First net deficit

Three forces drove the conversion: Macadamia margins of R80,000-120,000/ha compared to R15,000-25,000/ha for cane; The Health Promotion Levy reduced domestic demand by approximately 10-15%;, and rising input costs squeezed remaining growers toward the exit. The Eswatini sugar pipeline, comprising approximately R5.17 billion in imports under tariff heading 1701, is expected to deepen as South African refineries increasingly rely on regional raw sugar imports to compensate for declining domestic cane supply. Several domestic mills have already closed due to insufficient cane throughput.

Livestock: Competing in Global Protein Value Chains

Value Differentiation in South Africa's Protein Trade

> *South Africa exports premium protein products at higher unit values than the protein products it imports, creating a value spread that underpins its role in global protein trade.*

Livestock Export Performance: From Fisheries Recovery to Lamb Expansion for the period 2021–2025

Values in R Billion. Five-Year Trends. Source: SARS

#	Tariff	Product	2025	YoY	CAGR	Trend
1	03047490	Fish fillets (hake)	**3.4**	+32.9%	+13.1%	
2	02013090	Fresh bovine meat	**1.9**	-4.6%	+12.4%	
3	02041000	Lamb carcasses	**1.2**	+10.4%	+50.8%	
4	03036600	Frozen hake	**1.1**	+32.5%	+6.7%	
5	02023090	Frozen bovine meat	**0.9**	-24.5%	+0.2%	
6	03074300	Frozen molluscs	**0.8**	-49.7%	-3.8%	
7	04021090	Dairy concentrates	**0.7**	+44.7%	+17.6%	
8	04069099	Cheese	**0.7**	+82.6%	+18.7%	
9	03038900	Other frozen fish	**0.6**	+1.6%	+5.2%	
10	15042000	Fish oils	**0.5**	-37.9%	+26.1%	

Hake fillets have grown in every year of the five-year period, a record of expansion no other major tariff line can match. Lamb's 677% five-year growth is unprecedented.

Fisheries: A Consistent Performance

Fisheries remained the most stable contributor within the livestock subsector in 2025. Hake fillets (HS 0304) generated R3.7 billion, while Frozen hake (HS 03036600) contributed R1.1 billion, anchoring overall export performance. Heading-level values aggregate multiple tariff lines, which explains why total hake fillet exports at the heading level exceed those recorded under the dominant subheading.

South Africa's deep-sea trawl fishery retains Marine Stewardship Council (MSC) certification, the first African fishery to achieve this status, enabling access to premium European markets and supporting sustained price premiums. Strong demand from Spain and Portugal remained closely aligned with hake export performance, reinforcing the sector's resilience.

Lamb: An Emerging Export Platform

Lamb exports represent one of the most significant recent success stories within livestock trade. Export values increased from R150 million in 2021 to R1.16 billion in 2025, reflecting rapid market development from a low base. This expansion was enabled by Saudi Arabia's removal of a long-standing import ban in 2023, improved market access in the Middle East, and favourable exchange-rate conditions relative to major competitors.

South Africa's reputation for high-quality Karoo lamb further strengthened this emerging platform. If current access and supply conditions are maintained, exports could reach R23 Billion over the medium term. However, ongoing FMD outbreaks pose a significant risk to the sustainability of this growth trajectory.

Beef: Structural Constraints and Market Access Risks

Beef exports remained constrained by persistent animal health challenges. Combined fresh and frozen bovine meat exports reached approximately R3.1 billion in 2025, representing only a fraction of the estimated export potential. Disease outbreaks reduced export volumes substantially, while the spread of FMD to most provinces resulted in renewed trade restrictions. Notably, China imposed a comprehensive ban on South African cloven-hoofed animal products, further limiting market access and reinforcing the sectors vulnerability to biosecurity lapses. Restoring and safeguarding export competitiveness will depend on sustained investment in disease control, traceability systems, and regulatory capacity.

Between 2021 and 2024, beef exports expanded, increasing by approximately 50% over the three-year period. This upward trajectory was interrupted in 2025, when export values declined by around 13% compared with 2024, largely reflecting the renewed impact of FMD on market access. Despite this setback, fresh and chilled beef consistently outperformed frozen product exports, indicating stronger demand in higher-value segments. Over the five-year period, total export value nevertheless increased by approximately R726 million (around 30%), demonstrating underlying growth in the sector despite periodic animal health disruptions.

Dairy: Emerging Export Capability

Dairy exports continued to strengthen in 2025, reflecting improving competitiveness and market integration. Cheese exports reached R0.66 billion, while dairy concentrates generated R0.70 billion, together contributing R1.36 billion in export earnings. South Africa became a net dairy exporter in 2023 for the first time since 2014, marking a structural shift in the subsectors trade position. Rising urbanisation and retail modernisation across African markets are supporting sustained growth in regional demand, reinforcing dairys potential as a medium-term export growth platform.

Poultry Imports: Recent Trends and Emerging Pressures

Key Poultry Import Categories. R Billion. Source: SARS

MECHANICALLY DEBONED MEAT	CHICKEN FEET	LEG QUARTERS
R2.2bn	R0.8bn	R0.8bn
▼ -12.6%	▲ +21.1%	▲ +52.0%

The pattern in poultry leg quarter imports rising to R1.22 billion in 2021, declining to R0.50 billion in 2024, and rebounding to R0.76 billion in 2025 is consistent with potential trade diversion through countries not covered by existing anti-dumping measures and warrants closer regulatory monitoring.

Foot-and-Mouth Disease: Major Trade Disruption in 2025

Impact Across Livestock Export Categories. Source: National Department of Agriculture; SARS

PROVINCES AFFECTED	ANNUAL COST	CHINA STATUS
8/9	R5.6bn	All cloven-hoofed banned

BEEF
R3.7bn at risk; -26% in 2025; at 35-50% of R5-8bn potential

LAMB
R1.16bn at risk; Saudi Arabia, Jordan, Lebanon partial restrictions

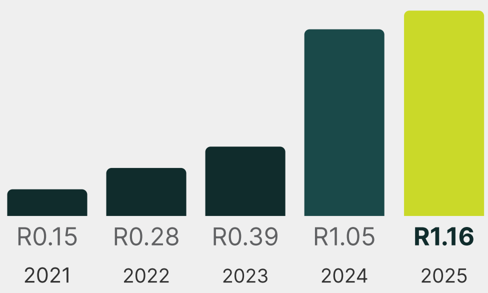
LIVE ANIMALS
R0.5bn at risk; export bans to multiple destinations

A national FMD vaccination process was launched in February 2026, marking an important step toward restoring animal health controls. However, rebuilding international confidence and regaining full market access will require sustained and coordinated effort.

Implication. Livestock represents one of South Africa's most promising avenues for export diversification, while also remaining the subsector most exposed to biosecurity risks. Therefore the policy priorities should include FMD containment, restore disease-free zones, and rebuild the international veterinary credibility that underpins sustained access to high-value export markets.

Case Study: The Emergence of South Africa's Lamb Export Platform

From the Karoo to the Middle East: Building a R1.2 billion Export Industry during the period 2021-2025



*All Values are in R Billion

The Emergence of the Lamb Export Platform

The current export trajectory was initiated in August 2023, following Saudi Arabia's removal of a 20-year ban on South African meat imports. This breakthrough reflected the convergence of three critical factors:

Market Access
Halal certification systems developed for the domestic market, including SANHA and MJC accreditation, became effective gateways to Middle Eastern export markets.

Currency Competitiveness
Sustained Rand weakness positioned South African lamb at a 20–30% price advantage relative to Australian and New Zealand suppliers.

Product Reputation
Karoo lamb's geographic identity and quality credentials supports its premium positioning in high-value markets.

Growth Potential and Risk Outlook

Middle Eastern meat demand is projected to expand at approximately 7% annually through 2033. If market access is maintained and exchange-rate conditions remain supportive, lamb exports could reach R2–3 billion by 2028.

However, this platform remains highly vulnerable to biosecurity disruptions. A prolonged FMD outbreak and associated market closures could reverse several years of market development within a short period, underscoring the strategic importance of sustained animal health controls.

"Horticulture generates 103% of South Africa's agricultural trade surplus. The R128.1 billion net position means that fruit, nuts, vegetables, and wine exceed the total national surplus of R124.7 billion"

4

AFRICA

SOUTH AFRICA’S PRIMARY TRADE ANCHOR

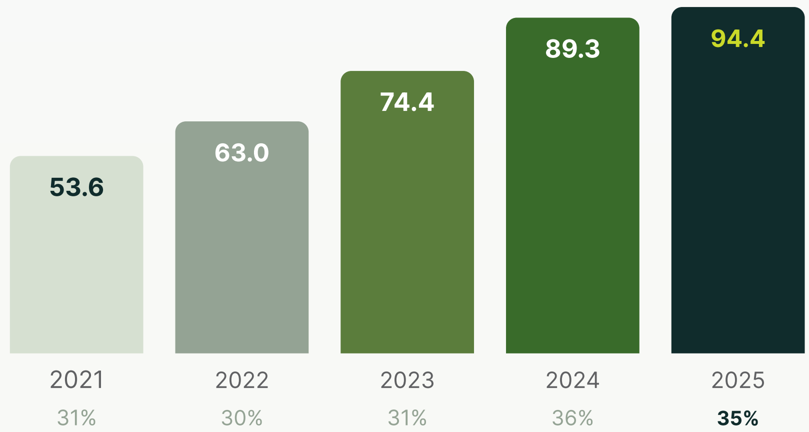
Agricultural Trade across the African Continent

R94.4 billion and Rising: Africa as South Africa's Primary Agricultural Market

> *Africa remained the dominant destination for South African agricultural exports in 2025, accounting for roughly 53% of total export value, with maize, fruit, sugar, and processed foods leading regional trade. Asia and the Middle East represented a further 17% of exports, underscoring the growing importance of emerging markets. Together, these regions highlight South Africa's increasing orientation toward regional and Global South markets, even as Europe and the Americas remain important high-value destinations.*

Africa Agricultural Exports Grew 76% in Five Years to R94.4 Billion

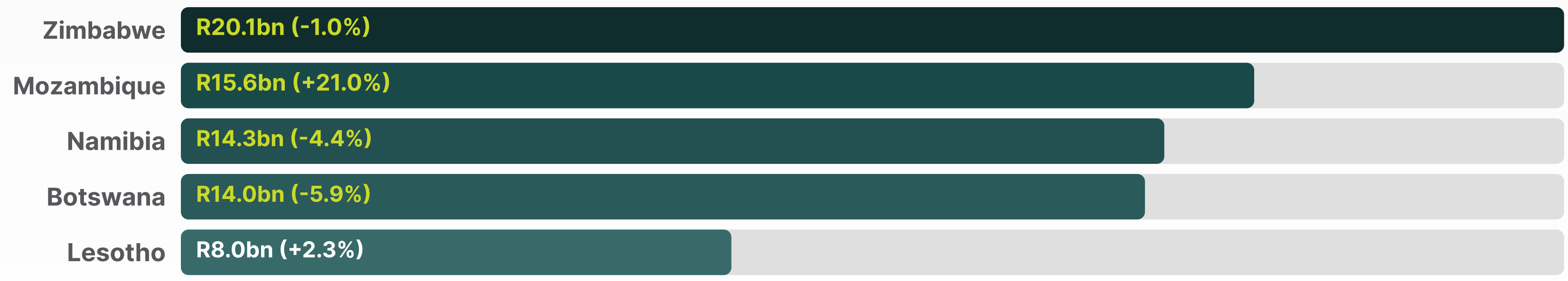
South African agricultural exports to Africa during the period 2021-2025. R Billion. Source: SARS



The 5.7% growth in 2025 reflects normalisation after two years of 17-20% emergency food demand growth. The five-year trend from R53.6bn to R94.4bn, 76%, remains the strongest regional trajectory.

Five SADC Neighbours Absorb 76.3% of Africa Exports

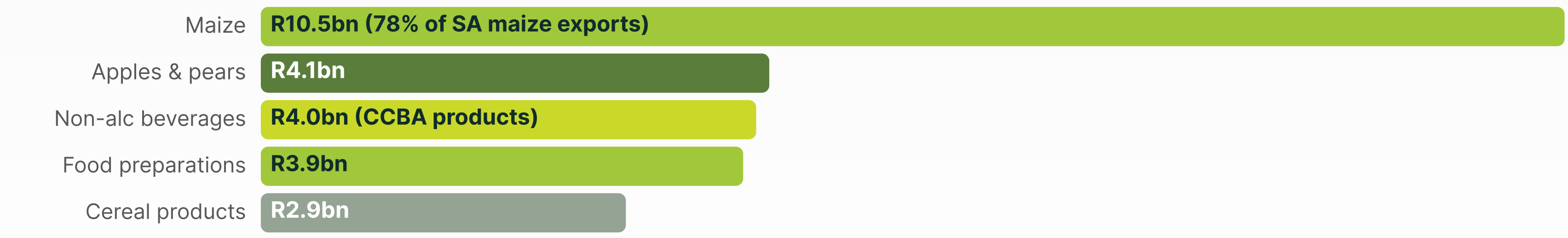
Top 5 African destinations for South African Exports. 2025. R Billion. Source: SARS



> *Three of the five leading African markets, Namibia, Botswana, and Lesotho, are fellow SACU members, reinforcing the role of the SACU integration in shaping regional trade flows. The remaining major destinations, Zimbabwe and Mozambique, are SADC partners with deep commercial linkages to South Africa. Geographic proximity, established distribution networks, and the strong presence of South African retailers underpin this regional trade pattern.*

South Africa as Both Regional Food Supplier and Agro-Processing Hub

Leading Agricultural Exports to Africa in 2025. R Billion. Source: SARS



Maize anchors food security; beverages and food preparations demonstrates that South Africa' is the continent's food processing and distribution hub.

Africa Export Performance: Five-Year Overview

South Africa's agricultural exports to African markets reached R94.4 billion in 2025, reflecting continued expansion from R89.3 billion in 2024 and R53.6 billion in 2021. Over the five-year period, exports to the continent increased by approximately 76%, making Africa the fastest-growing major regional destination for South African agricultural products. By 2025, Africa accounted for approximately half of total agricultural exports, reinforcing its position as South Africa's most important regional market. More broadly, emerging and developing markets collectively absorbed around 53% of exports by the end of 2025, highlighting a sustained shift toward regional and Global South trade.

This expansion reflects deepening regional trade linkages, improved transport and logistics corridors, and South Africa's role as a gateway economy with strong regulatory and compliance capacity. These attributes support regional processing, redistribution, and consolidation across African markets, enhancing South Africa's function as a regional trade and supply hub. While the African Continental Free Trade Area (AfCFTA) provides a long-term framework for continental integration, implementation remains uneven and phased. As a result, agricultural trade continues to operate under established bilateral, regional, and customs union arrangements, supported by infrastructure investment and private-sector distribution networks. A section on the AfCFTA is included later in this report.

South Africa's trade relationship with the continent continues to generate substantial surpluses, with exports consistently exceeding imports. The country plays a critical role in regional food security, supplying staple grains, processed foods, beverages, and fresh produce, particularly during periods of regional supply disruption. Ongoing investments in transport and port infrastructure in Mozambique, Zimbabwe, and Zambia have further reduced trade costs and strengthened market access.

Top African Export Destinations

Regional trade remains anchored in neighbouring and proximate markets. Zimbabwe remained South Africa's largest African agricultural export destination in 2025, with exports valued at R20.1 billion, reflecting sustained demand linked to structural food supply deficits. Mozambique followed at R15.6 billion, supported by strong corridor connectivity and expanding consumer markets. Namibia (R14.3 billion), Botswana (R14.0 billion), and Lesotho (R8.0 billion) completed the top five, underpinned by customs union arrangements, established retail networks, and close commercial integration. Together, these markets accounted for the majority of South Africa's agricultural exports to the continent.

Three of the five leading destinations, Namibia, Botswana, and Lesotho, are fellow SACU members, reinforcing the role of customs union integration in shaping regional trade flows. Zimbabwe and Mozambique, while outside SACU, maintain deep commercial linkages through proximity, logistics connectivity, and South African retail presence. Zambia (R7.3 billion) ranked as the sixth-largest African market, reflecting continued expansion in regional demand.

Leading Agricultural Exports to African Markets

South Africa's agricultural exports to Africa in 2025 were anchored by staple commodities and increasingly supported by value-added food products, reflecting the country's dual role in regional food security and agro-processing.

Maize remained the largest export category, with shipments valued at approximately R10.5 billion, accounting for approximately 11% of agricultural exports to the continent. Demand was driven primarily by structurally import-dependent countries and periodic production shortfalls. Apples and pears generated a combined R4.1 billion, supported by expanding regional retail networks and cold-chain capacity.

Non-alcoholic beverages reached R4.0 billion, while food preparations, including breakfast cereals, maize-based products, sauces, and condiments, contributed R3.9 billion, underscoring rising consumer demand for processed foods. Processed cereals added a further R2.9 billion, reinforcing South Africa's position as both a major grain producer and a regional agro-processing hub.

Together, these categories reflect South Africa's dual function as a supplier of essential food commodities and as a central manufacturing, distribution, and logistics platform for African markets. Regional export patterns remain heavily influenced by Southern African demand dynamics. Zimbabwe's position as the leading African destination reflects sustained reliance on South African food supplies during periods of domestic production shortfall. In 2024, El Niño conditions reduced Zimbabwe's maize output to approximately 635,000 tonnes against a national requirement of 1.5 million tonnes, increasing import dependence and food assistance needs. Mozambique's strong growth reflects deepening integration along the Maputo Corridor and rapid urbanisation, while Botswana's recent decline is partly linked to reduced consumer spending following weakness in the global diamond market.

Beyond Southern Africa, longer-term growth opportunities are concentrated in major West and East African economies, including Nigeria, Kenya, Ghana, Tanzania, and Ethiopia. These markets are characterised by large and growing populations, rising urbanisation, and expanding formal retail sectors, creating demand profiles well suited to South African manufacturers.

The African Continental Free Trade Area (AfCFTA) provides an enabling framework for this expansion, following agreement on substantial tariff liberalisation under the Goods Trade Initiative. However, implementation remains uneven, and non-tariff barriers, logistics costs, and regulatory fragmentation continue to constrain market penetration beyond the SADC region.

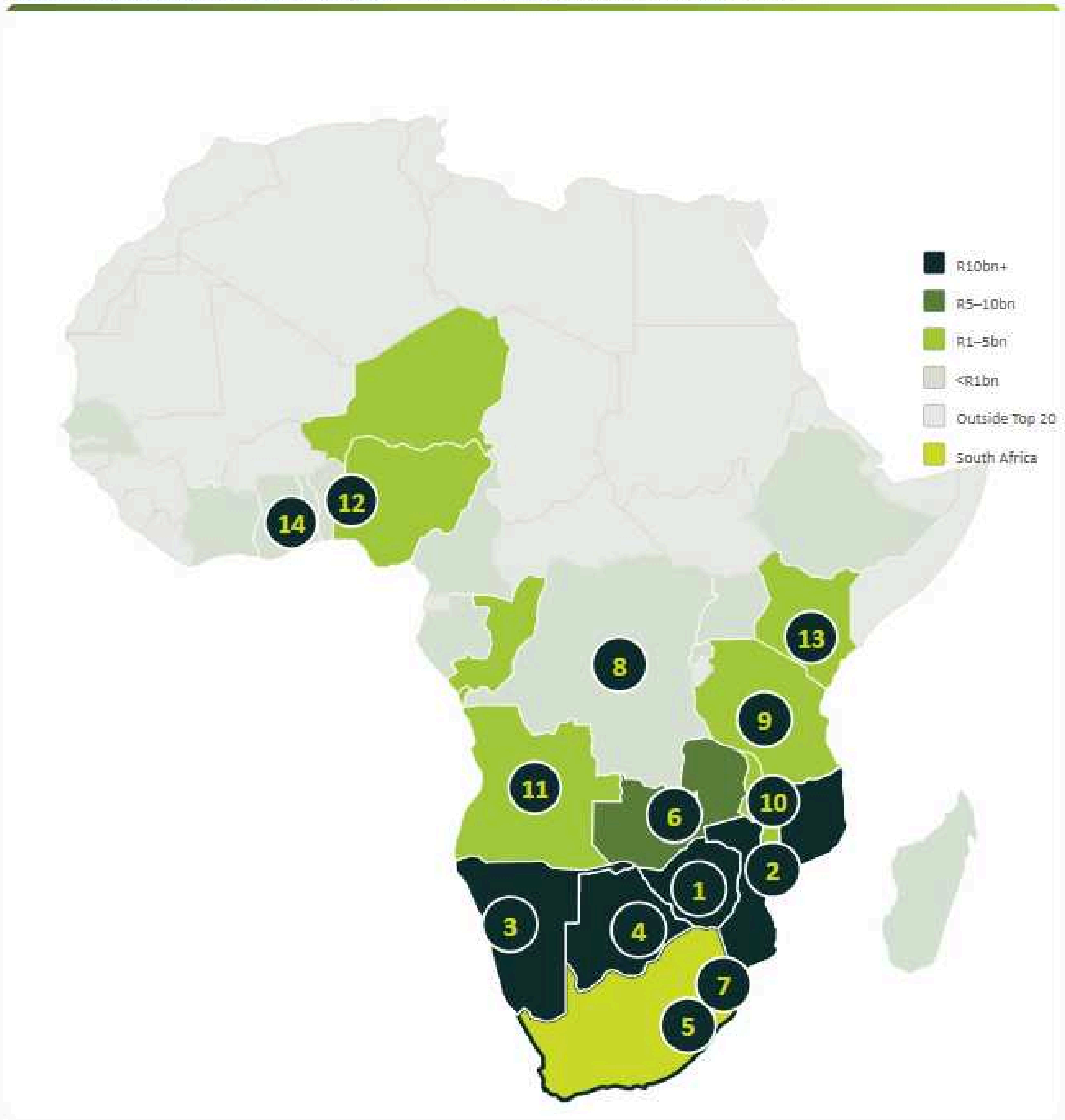
Strategic implication

Approximately 69% of South Africa's agricultural exports to Africa remain concentrated in five neighbouring SADC markets, creating a structural limitation to long-term diversification. While these markets provide stability and scale, sustained export growth will increasingly depend on deeper engagement with West and East African economies.

The next phase of regional expansion must therefore prioritise improved transport connectivity, regulatory alignment, and trade facilitation beyond Southern Africa. Although AfCFTA provides institutional architecture, realising its potential will require coordinated public- and private-sector investment to reduce logistics costs and overcome persistent non-tariff barriers. Success in these areas will determine whether South Africa consolidates its position as the continent's primary agricultural trade hub over the medium term.

South Africa's Agriculture Trade with Africa

Top 15 African Bilateral Agricultural Trade Partners in 2025. Values in R Billion. Geographic Distribution of Agricultural Exports by Value



AFRICA TRADE 2025
R94.4bn
Exports. 35% of total. +76% 5yr

SADC Concentration: 76.3%
Five SADC neighbours absorb R72.0bn of R94.4bn. SA retail dominance and SACU preferences drive concentration.

Eswatini: Net Deficit R2.1bn
SA imports R9.2bn (sugar under SACU) vs R7.1bn exports. The only Top 10 African partner with a bilateral deficit.

Next Frontier Markets
Angola (+15.8%), Tanzania (+12.0%), Kenya (+9.2%). Non-SADC markets growing fastest.

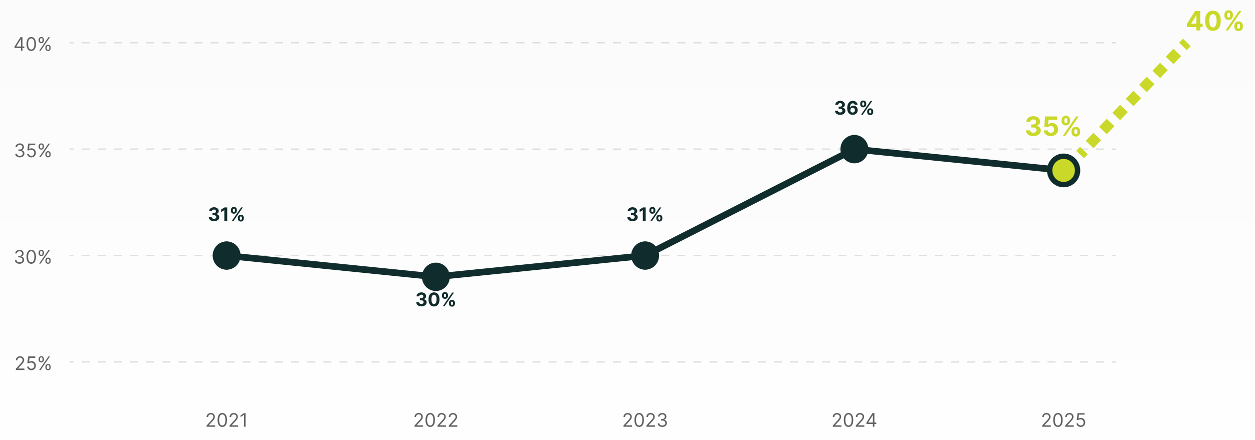
Top 15 African Trade Partners

Rank	Country	Value	Change
1	Zimbabwe	R20.1bn	-1.0%
2	Mozambique	R15.6bn	+21.0%
3	Namibia	R14.3bn	-4.4%
4	Botswana	R14.0bn	-5.9%
5	Lesotho	R8.0bn	+2.3%
6	Zambia	R7.3bn	+6.6%
7	Eswatini	R7.1bn	+8.4%
8	DRC	R4.3bn	+1.6%
9	Tanzania	R2.8bn	+12.0%
10	Malawi	R2.5bn	+8.7%
11	Angola	R2.2bn	+15.8%
12	Nigeria	R1.7bn	+5.0%
13	Kenya	R1.3bn	+9.2%
14	Ghana	R950m	+3.3%
15	Mauritius	R700m	+4.5%

Source: SARS customs data. AgricultureSA.io Analysis. HS Chapters 1-24. 2025.

Africa's Share of Total SA Agricultural Exports: Trajectory to 40%

Africa exports as % of total, with absolute value. Source: SARS



Five interrelated structural factors continue to deepen South Africa's trade relationship with the continent: (1) progressive tariff liberalisation under the AfCFTA framework; (2) the expansion of major South African retail and food companies across multiple African markets, including Shoprite, Tiger Brands, Coca-Cola Beverages Africa, and Pioneer Foods; (3) sustained population growth and urbanisation; (4) improved regional logistics corridors, notably the Maputo, Beira, and North–South routes; and (5) South Africa's position as the continent's largest food processing and distribution hub.

South Africa's maize trade with African markets extends beyond commercial exchange. It increasingly functions as a strategic stabilising mechanism within regional food systems, carrying both economic benefits and broader responsibilities. Climate projections indicate rising rainfall variability across the Zambezi Basin, suggesting that periods of surplus and deficit will become more frequent and more extreme. This will heighten the importance of South Africa's role as a reliable supplier during regional supply disruptions.

Case Study: Maize Diplomacy: Feeding Southern Africa

R10.5 Billion in Maize Exports: How South Africa's Surplus Became a Regional Lifeline

The 2024 El Niño event precipitated the most severe regional food security shock in a decade across Southern Africa. Zimbabwe's maize production declined to approximately 635,000 tonnes, less than half of its estimated national requirement. Zambia declared a national disaster, and an estimated 27 million people across the region were exposed to acute food insecurity.

16.3M Tonnes produced → **~12M** Domestic use → **~4-5M** Export surplus (tonnes) → **R10.5bn** to SADC markets

South Africa occupies a distinctive position as the only country in Southern and East Africa with the production scale, logistics infrastructure, and storage capacity required to consistently generate exportable surpluses of white maize. No other regional producer currently challenges South Africa's share of more than 60% of regional white maize trade.

This role, however, carries an inherent vulnerability. During El Niño episodes, the same climatic conditions that suppress regional output can also constrain South African production, potentially limiting export availability precisely when neighbouring countries face acute shortages. The 2015/16 El Niño provides a clear precedent, during which South Africa temporarily shifted into a net maize import position.

Status of the African Continental Free Trade Area (AfCFTA)

African Continental Free Trade Area. December 2025

Implementation Status

Ratification: 54 of 55 AU members signed; ~47 ratified. Eritrea sole non-signatory.

Tariff Liberalisation: 90% of lines to be liberalised by 2031. 7% sensitive, 3% excluded.

Rules of Origin: Agreed for 87.7% of tariff lines. Outstanding: automotive, textiles, sugar, dairy.

Services: Five priority sectors covered. Many national schedules remain incomplete.

Practical Trade Impact

Guided Trade: Pilot transactions across 8 countries, 96 product lines. Volumes modest (~US$30M).

PAPSS: Operational in 12 countries. Local-currency settlement; costs 3–5% lower.

Nigeria: Not yet fully trading under AfCFTA preferences. SA processed foods face NTBs.

South Africa's Opportunity: Incremental export potential of R3–8bn by 2030 in processed foods, beverages, dairy, poultry.

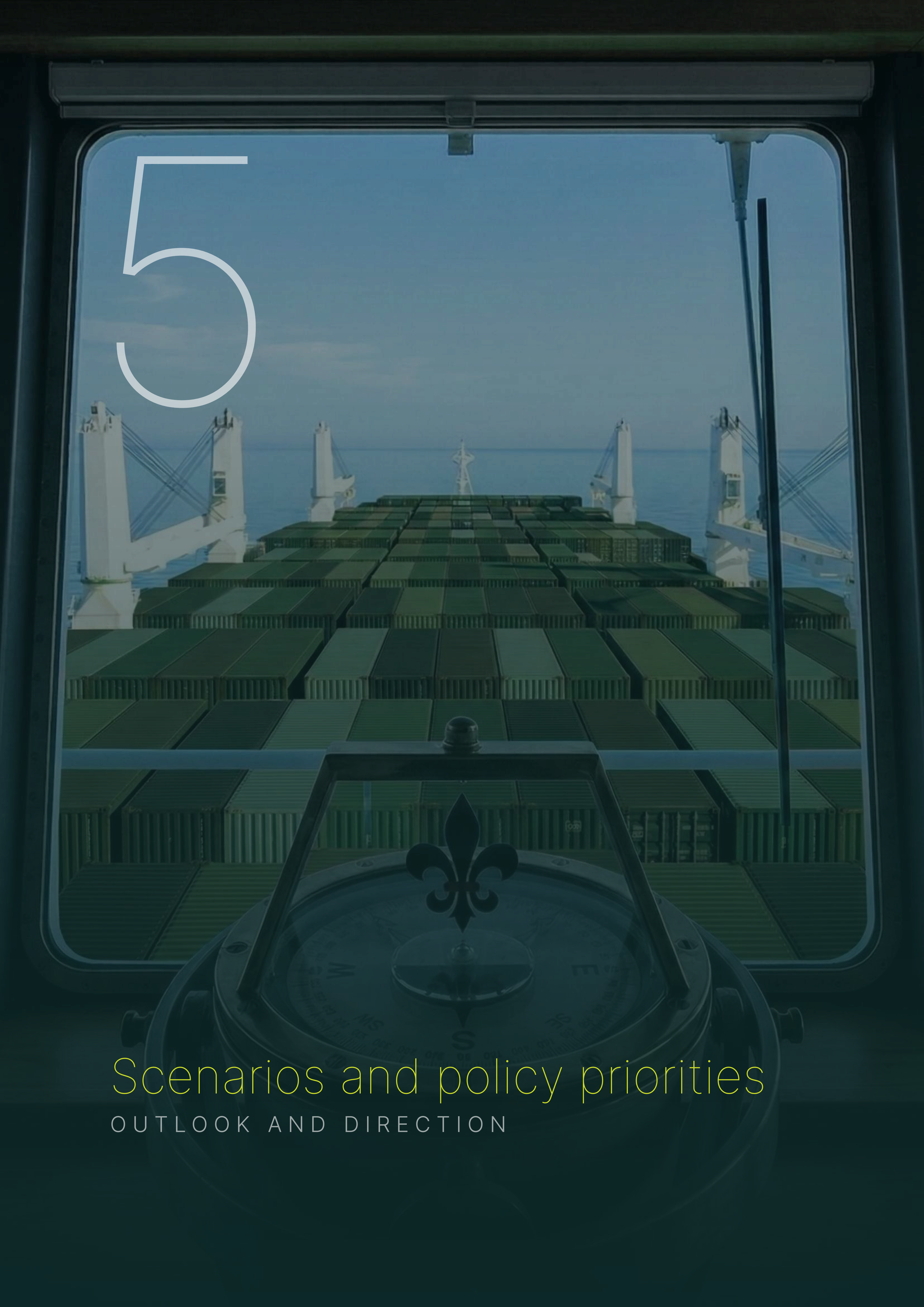
NTB Warning

Non-tariff barriers (SPS, customs delays, transport costs) remain the primary obstacle. Intra-Africa trade still only ~15% of continental total.

South Africa's Strategic Positioning

SA remains Africa's largest agricultural exporter and leading food processing hub. AfCFTA structurally favours SA's competitive position.

Source: African Union, Tralac, SARS Customs Data. December 2025



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Scenarios and policy priorities

OUTLOOK AND DIRECTION

Case Study

Wine and Beverages: Trade Balance Performance

Why R15.7 Billion in Trade Surplus Deserves Its Own Story

> *With a net surplus of approximately R15.7 billion, HS Chapter 22 outperforms the entire livestock subsector, underscoring the case for more detailed treatment in future reports.*

HS Chapter 22: A R15.7 Billion Trade Surplus Requiring Dedicated Analysis

Full Chapter 22 Breakdown. 2025. R Billion. Source: SARS

Category	Exports	Imports	Net	Balance
Wine (2204)	11.2	0.9	**+10.3**	
Non-alc beverages (2202)	6.5	3.0	+3.5	
Ethyl alcohol (2207)	3.2	<0.1	+3.1	
Fermented beverages (2206)	2.9	0.5	+2.4	
Spirits (2208)	2.5	6.8	**-4.3**	
Beer (2203)	2.2	1.7	+0.4	
Other (2201, 2205, 2209)	0.5	0.2	+0.3	
Total Chapter 22	**28.8**	**13.2**	**+15.7**	

Spirits, driven mainly by whisky imports, remain the sole deficit component of HS Chapter 22, representing a structurally import requirement, while wine generates roughly two-thirds of the net surplus.

Wine exports, valued at R11.2 billion in 2025, remain under sustained pressure due to a convergence of structural and market-related headwinds. These include residual disruptions from COVID-19 lockdowns, which weakened long-term supply contracts; persistently low average export prices of approximately US$2.50–3.00 per litre, compared with US$3–4 in Chile and US$4–5 in Australia; the imposition of a 30% tariff in the United States; and duty restructuring in the United Kingdom that disproportionately affects higher-alcohol wine styles.

These pressures have been compounded by ongoing industry consolidation, with the number of registered cellars declining from more than 600 to approximately 500, reflecting margin compression and rising compliance costs across the value chain.

Five Headwinds Facing South African Wine Exports

Challenges constraining the R11.2 billion wine franchise

COVID DAMAGE	LOW PRICES	US 30% TARIFF	UK DUTY REFORM	CONSOLIDATION
20 weeks of sales bans; permanent buyer switching to Chile, Argentina, Australia	$2.50-3.00/L FOB vs Chile $3-4, Australia $4-5; 60% bulk in flexitanks	Wine not exempted; Chile and Australia at 0% under FTAs	ABV-based duties penalise SA Shiraz/Pinotage (13.5-14.5% ABV)	600+ to ~500 cellars; Distell-Heineken merger; fragmented & under-capitalised

Beyond Wine: The Broader Beverages Economy

Non-alcoholic beverages generated export earnings of approximately R6.5 billion in 2025 and produced a net trade surplus of R3.5 billion, with R4.0 billion directed to African markets. Much of this performance was driven by products distributed through Coca-Cola Beverages Africa, reflecting the strength of South Africa's regional beverage manufacturing and distribution networks.

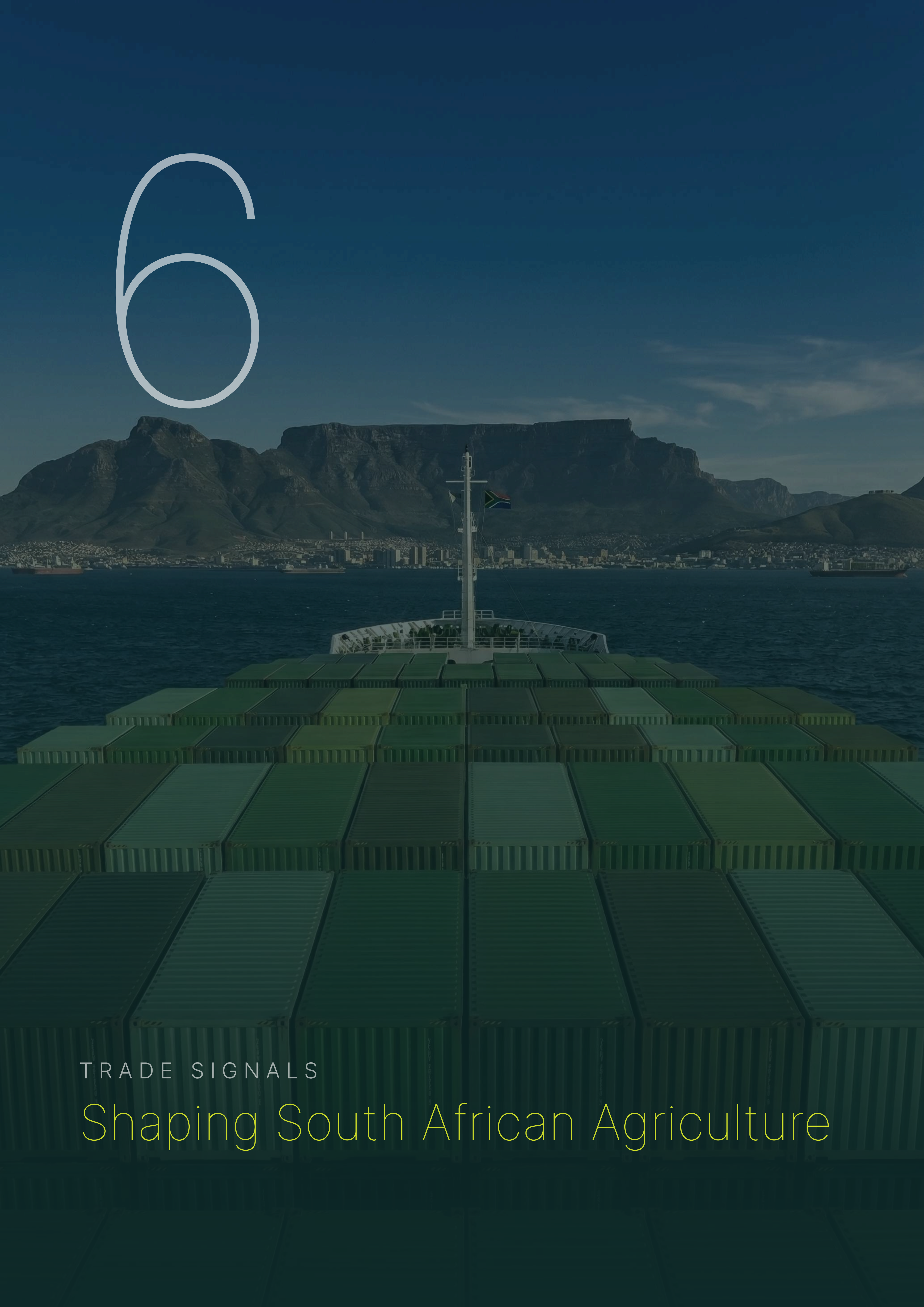
Ethyl alcohol exports (R3.2 billion) and beer (R2.2 billion) contributed additional trade surpluses, reinforcing the broader beverages sector as a significant source of value-added export earnings.

In contrast, spirits remain the principal source of import pressure, with imports totalling approximately R6.8 billion, driven predominantly by Scotch whisky. As whisky production is geographically protected and concentrated in the United Kingdom, this deficit represents a structurally irreducible component of the import bill.

Implication

The scale and composition of HS Chapter 22 highlights the case for dedicated trade analysis and a revised subsector classification that provides the beverages and wine complex with standalone visibility. A net surplus of approximately R10.3 billion warrants more systematic analytical treatment within future reporting frameworks.

The 2025 trade data indicate that the impact of existing wine sector development strategies has not yet translated into measurable improvements in export performance. A coordinated review of strategic effectiveness is therefore warranted. In the near term, potential growth opportunities are concentrated in selected markets, including Russia, premium African consumer segments, and targeted repositioning within higher-value global wine categories.



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TRADE SIGNALS

Shaping South African Agriculture

Trade Signals Shaping South African Agriculture

Advancing South Africa's Export Strategy

In recent years, the Department of Agriculture pursued a focused strategy to both defend existing export markets and expand access to new markets. On the defensive front, it has advanced the WTO dispute against the EU's citrus measures, challenged disproportionate phytosanitary requirements, and continues to respond to the 30% US tariff shock protecting export confidence and sustain trade flows.

At the same time, the Department has secured tangible diversification gains. These include reopening fresh apple exports to Thailand, opening and expanding horticultural access to China (avocados and stone fruit), progressing grape exports into Southeast Asia, advancing bilateral protocols with India, Japan and Middle Eastern partners, and formally seeking expanded tariff preferences for South African wine in Japan.

Collectively, these actions reflect a proactive and strategic trade agenda aimed at strengthening South Africa's global agricultural footprint, reducing market concentration risk, and positioning the sector for resilient, export-led growth.

Government Actions and Market Access Milestones

Key interventions during the 2024/25 period shaping South Africa's agricultural trade trajectory

No.	Date	Issue / Focus Area	Market / Partner	Ministerial Action	Trade & Agricultural Significance
1	Jul 2024 (ongoing)	WTO dispute on EU citrus measures (FCM & CBS)	European Union	Advanced dispute to WTO panel stage and intensified technical and diplomatic engagement through WTO and EU–SADC EPA mechanisms	Defends science-based trade rules and protects South Africa's citrus export industry from protectionist SPS barriers
2	8 Oct 2024	First commercial avocado shipment	China	Supported market access efforts and highlighted logistics advantages following the first 21-ton shipment to Shanghai	Opens a major high-value Asian market for South African avocados and strengthens horticultural diversification
3	4 Feb 2025	Fresh apple exports reopened	Thailand	Announced restoration of market access following years of suspension	Re-establishes an important Asian destination and reduces concentration risk in traditional export markets
4	26 Feb 2025	Table grape market opening	Philippines	Concluded decade-long negotiations enabling South African grape exports	Expands access into Southeast Asia and strengthens diversification beyond EU markets
5	21 Apr 2025	G20 Agriculture Working Group hosted by South Africa	Multilateral (G20)	Promoted inclusive agricultural trade, technology transfer, and improved market participation for developing producers	Strengthens South Africa's multilateral leadership and alignment with continental trade frameworks
6	Jul–Sep 2025	Expansion of grape access in Southeast Asia	Vietnam, ASEAN	Reported progress on new and expanded grape export protocols	Consolidates ASEAN as a strategic growth corridor for horticultural exports
7	12–13 Aug 2025	Response to 30% tariff increase on SA exports	United States	Announced a mitigation strategy including trade engagement, tariff relief discussions and accelerated diversification	Stabilises exporter confidence and reduces vulnerability to tariff shocks
8	18 Aug 2025	Export performance monitoring following tariff shock	United States	Highlighted continued export growth and ongoing engagement with US counterparts	Reinforces negotiation credibility while maintaining market presence
9	11 Sep 2025	Tariff preference request for wine	Japan	Submitted proposal to Japan's MAFF Minister seeking expanded tariff preferences under the GSP scheme	Would improve competitiveness of South African wine in Japan and support value-added exports
10	12 Sep 2025	Bilateral phytosanitary protocols	India, Japan, Middle East	Advanced protocols for avocados (India), beef (Middle East) and maize (Japan)	Expands South Africa's market footprint across Asia and the Middle East
11	Sep 2025	Draft Export Regulations (R.6665)	Domestic	Invited public comment on new export regulatory framework	Strengthens export governance, compliance standards and facilitation
12	15 Oct 2025	Stone fruit export protocol	China	Signed agreement opening Chinese market to apricots, peaches, nectarines, plums and prunes	Creates a major new high-value market channel for South African deciduous fruit

China and South Africa Trade Framework

South Africa and China signed the landmark Framework Agreement on Economic Partnership for Shared Prosperity (CAEPA) in February 2026, aiming to boost trade and investment, with a key focus on expanding agricultural exports. The deal facilitates duty-free access for South African products to China, specifically targeting agricultural goods like wine, fruits, and nuts.

Key Aspects of the CAEPA Agreement: The deal is expected to significantly improve access for South African agricultural products, including citrus and rooibos tea, by reducing high tariffs. Negotiations are underway to secure an Early Harvest deal, expected by the end of March 2026, which will provide immediate, preferential, or zero-tariff access for selected products.

Investment and Trade: Beyond agriculture, the agreement aims to strengthen bilateral trade, promote investment in mining and manufacturing, and support Small and Medium Enterprises (SMEs). Preferential zero-tariff arrangements for selected products are improving the price competitiveness of South African exports in key Asian markets and redirecting trade flows away from higher-tariff destinations. In late 2025 and early 2026, South African export associations and Chinese regulators held joint technical engagements to resolve backlogs and open additional tariff lines under framework cooperation. This makes access to China more structured and less ad-hoc, encouraging exporters to scale up production for that market.

CAEPA: South Africa and China signed the China–Africa Economic Partnership Agreement (CAEPA) on 6 February 2026, establishing a framework for expanded trade and investment cooperation. The agreement will be followed by an Early Harvest arrangement expected to be concluded by the end of March 2026, which is intended to grant duty-free access for South African exports across qualifying tariff lines. Once operationalised, the arrangement is expected to improve the competitiveness of key agricultural exports to China and support South Africa's broader strategy of market diversification toward Asia. Compared to previous years, through lowering the cost of entry, this preferential tariff structure has already shifted some exports toward Asia.

AfCFTA implementation: Recent specific happenings In 2025, South Africa began operationalising new AfCFTA tariff liberalisation schedules with several African partners, lowering or eliminating tariffs on agricultural goods moving within the continent. There have been pilot corridor initiatives under AfCFTA in Southern Africa, facilitating smoother customs processing and reducing non-tariff delays for maize, fruit, and processed foods. South African exporters are reporting tangible increases in intra-African trade volumes on routes into East and West Africa. AfCFTA is moving beyond theory into real trade flows this year, enhancing intra-African export opportunities.

Preferential Access under Pressure

Preferential trade arrangements are becoming more volatile and political

Short-term extensions of AGOA in the United States, rising US tariff pressures, and tightening regulatory conditions in the European Union are reducing the predictability of South Africa's traditional export markets. As access conditions become more volatile and compliance costs rise, exporters face greater difficulty in planning long-term investments, managing risk, and sustaining established market positions. This is accelerating market diversification and increasing the importance of continuous trade diplomacy and regulatory engagement.

AGOA Short-term extension

Recent short-term extensions of AGOA with the United States have maintained market access for South African agricultural exports, but without long-term certainty. This limits exporters' ability to plan multi-year investments and increases exposure to sudden tariff changes linked to political and policy shifts.

CAEPA**Tightening Regulatory Standards in the EU**

The European Union is strengthening environmental, pesticide, traceability, and sustainability requirements for agricultural imports. While these standards support consumer and environmental objectives, they are raising compliance costs and increasing the risk of market exclusion for smaller and less-resourced exporters. While preferential access is becoming more volatile, targeted engagement, diversification, and regulatory readiness offer pathways to reduce risk and strengthen long-term competitiveness.

Trade Fragmentation and Geopolitical Pressure

Global trade is becoming more fragmented along political and strategic lines

What is happening: Strategic rivalry between the United States and China is reshaping global trade and supply chains. Expanded sanctions is affecting countries such as Russia are disrupting grain, fertiliser, and energy markets. Major economies are adopting friendshoring strategies, prioritising politically aligned partners. Global trade is increasingly organised along geopolitical blocs. South Africa maintains significant trade relationships across multiple geopolitical groupings.

As global trade becomes more politically influenced, balancing these relationships becomes more complex. Agricultural exporters face greater exposure to political disruptions, pressure to align with specific blocs, and risks of being affected by disputes unrelated to commercial performance. At the same time, fragmentation creates opportunities for South Africa to position itself as a reliable supplier. Growing geopolitical fragmentation is reshaping global trade relationships, requiring South Africa to carefully balance partnerships while protecting traditional markets.

Intensifying Global Competition in Agriculture Export Markets

Competition for premium agricultural markets is increasing:

- Major agricultural exporters such as Brazil, Chile, Peru, Australia, and Argentina are expanding production and export capacity.
- Increased public and private investment in competitor countries is improving scale, logistics, and market penetration.
- Competitors are actively securing preferential access and strengthening branding in key markets.
- Price competition and supply reliability are becoming more decisive in buyer decisions.

Market access alone is no longer sufficient to secure export growth. South African exporters must compete more directly on cost efficiency, quality consistency, branding, and supply reliability. Rising competition places pressure on margins and requires continued investment in productivity, innovation, and market positioning. Without sustained competitiveness, South Africa risks losing market share even where access conditions are favourable. Intensifying global competition is raising the importance of productivity, branding, and reliability in determining South Africa’s long-term export performance.

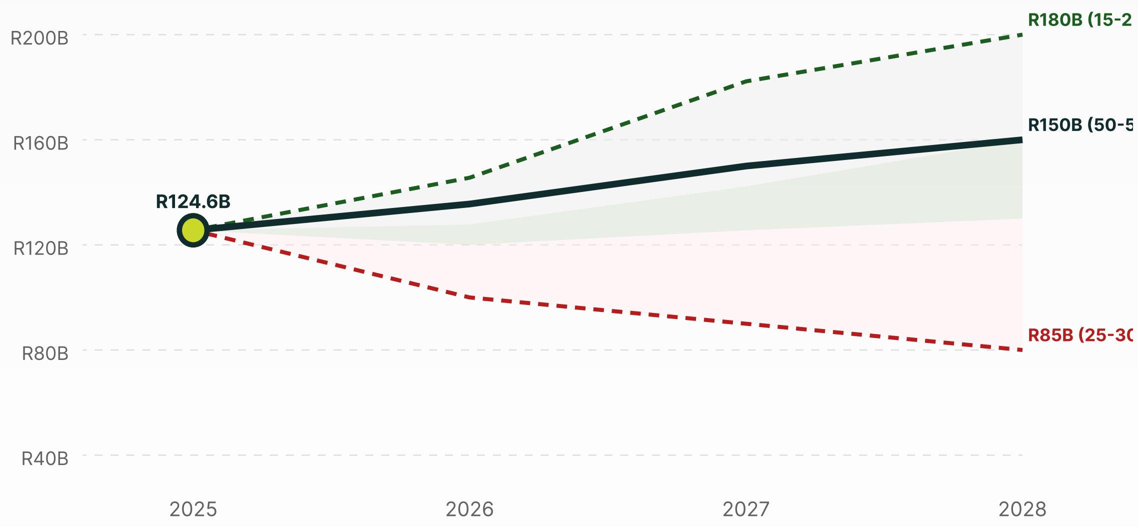
Medium-Term Outlook 2026–2028: Scenario Analysis

Optimistic, Base, and Downside: What the Next Three Years Could Bring

> *By 2028, the agricultural trade surplus could range from approximately R85 billion under adverse conditions to R180 billion under favourable scenario; a potential variation of nearly R100 billion driven by five key variables largely beyond farmers' direct control.*

Three Scenarios for Agricultural Trade Surplus for the period 2025-2028

R Billion. Probability-weighted projections. Source: AgricultureSA.io Analysis



The asymmetric risk profile is the critical finding: downside scenarios are more probable and higher-impact than upside scenarios. Defence of the existing surplus must take priority over offence in new markets.

OPTIMISTIC (15-20%)

R165-180bn

FMD contained Q3 2026. EU SPS managed. AfCFTA accelerates. Port PPPs deliver. US tariff rolled back. La Niña supports crops.

Requires simultaneous resolution of FMD, US tariff, and EU SPS – unlikely.

BASE CASE (50-55%)

R135-150bn

FMD partially contained. EU SPS tense but managed. Africa +6-8% pa. US exemptions maintained. Moderate El Niño. Logistics improve incrementally.

Most probable – extrapolation of current trends with headwinds partially absorbed.

DOWNSIDE (25-30%)

R85-105bn

EU escalates citrus SPS. FMD not contained; China ban persists. AGOA not renewed. Severe El Niño. Transnet worsens. Rand R22+/USD.

Two triggers already materialised (FMD + US tariff). Probability revised upward.

Key Determinants of Whether 2025 Represents a Platform or a Peak

Risk assessment matrix: Probability vs Impact. Source: AgricultureSA.io Analysis

Risk Factor	Probability	Annual Impact	Status	Key Determinant
EU SPS on citrus	40-60%	**R10-20bn**	ACTIVE	WTO WT/DS613 outcome; Spain lobby intensity; FCM detection rate
FMD prolongation	60-70%	**R5.6bn**	CRISIS	Vaccination programme effectiveness; WOAH timeline; China diplomacy
US tariff regime	70-80%	**R1-3bn**	ACTIVE	AGOA renewal; BRICS optics; product-specific exemptions
El Niño return	50-60%	**R5-8bn**	WATCH	Late 2026 models; severity determines crop/regional demand impact
Port logistics	80-90%	**R3-5bn**	SYSTEMIC	Durban Pier 2 PPP progress; reefer plug capacity; weather events

All identified risks require coordinated action between government and industry, as they cannot be mitigated by the commercial farming sector in isolation. This structural imbalance supports a primarily defensive strategy, prioritising the protection of the existing surplus before pursuing additional market expansion.

Trade Signal: China's LDC Zero-Tariff Policy a Competitive Risk, Not Opportunity

China's December 2024 decision to grant zero-tariff access to Least Developed Countries (LDCs) has been widely misinterpreted as an opportunity for South African exporters. In practice, the policy places South Africa at a competitive disadvantage, as the country does not qualify for LDC preferences.

The primary beneficiaries are lower-cost competitors, including Mozambique (sugar), Ethiopia (coffee), and Tanzania (cashews), whose products now enter the Chinese market at zero tariff. This preferential access is likely to intensify price competition and further erode South Africa's market share in selected agricultural categories.

South Africa's principal pathway to improved market access lies instead in the ongoing negotiations under the China–Africa Economic Partnership Agreement (CAEPA). If concluded and implemented effectively, CAEPA could deliver targeted tariff reductions for priority agricultural exports, including citrus, wine, and (following restoration of disease-free status) beef. However, realising these gains will require sustained and proactive engagement.

At present, progress on livestock access is constrained by China's ban on South African cloven-hoofed animal products linked to FMD, limiting the scope for meaningful negotiations in this segment until veterinary status is restored.

Net Assessment: In 2025, agricultural exports to China declined by 10.1% to R8.7 billion, resulting in a bilateral deficit of approximately R0.6 billion. The LDC zero-tariff policy is expected to widen South Africa's relative competitive disadvantage. CAEPA therefore represents the primary mechanism for restoring balance in the trade relationship. Priority areas for negotiation should include enhanced market access for citrus and wine, alongside medium-term preparations for renewed livestock exports once biosecurity conditions permit.

Implication. The scenario analysis reveals an asymmetric risk profile. Downside scenarios are driven by government-domain risks (FMD, port logistics, trade diplomacy) that the commercial sector cannot mitigate independently. Upside scenarios require both sustained commercial investment and effective government execution. This argues for a defensive strategy: protect the R124.6 billion surplus through phytosanitary compliance, FMD containment, and port investment before pursuing R20-50 billion in potential upside from AfCFTA and new markets. The R44.9 billion citrus franchise, the R94.4 billion African trade corridor, and the R1.16 billion lamb platform are not guaranteed to persist and should be defended.

Policy Priorities: Five Priority Interventions

Five Policy Interventions Worth R10 billion in Agricultural Trade Value

1 CONTAIN FMD & REBUILD DISEASE-FREE STATUS

R5.6bn/year recovered + R2-5bn unlocked. 24-36 months. National Department of Agriculture, SAMIC, RPO

Disease in 8/9 provinces (2025). China ban. Saudi restrictions. Beef -26%. Lamb platform at risk. First vaccination in 20 years launched Feb 2026.

2 DEFEND R44.9bn CITRUS FRANCHISE AGAINST EU SPS

R44.9bn protected (R4.5bn at risk from 10% restriction). Ongoing. National Department of Agriculture, CGA, PPECB

EU cold treatment imposed. Spain lobby pressing. WTO dispute WT/DS613 filed. R500M investment = 1% of asset defended.

3 INVESTIGATE LEG QUARTER REBOUND FOR CIRCUMVENTION

R0.8-1.2bn domestic production protected. 12-18 months. ITAC, SAPA

Leg quarters surged 52% after 3 years of decline. Pattern consistent with tariff circumvention through non-covered countries.

4 CAPTURE R0.5-1bn IN JUICE PROCESSING IMPORT SUBSTITUTION

R0.5-1.0Bbn substitution + 500-800 jobs. 36-48 months. DTIC, Hortgro, CGA, IDC

SA exports R11.6bn fresh apples but imports R1.7B juice from China. Processing gap, not production gap. Western Cape/Eastern Cape capacity needed.

5 DEVELOP MANAGED SUGAR INDUSTRY TRANSITION

85,000 jobs managed. 5-10 years. National Department of Agriculture, DTIC, SASA, KZN Province

Accept structural reality. Retrain/redeploy. Support viable mills. Regional refining hub strategy with Eswatini.

Cumulative Impact: R10–15 Billion in Trade Value and 85,000 Jobs

Quantified policy intervention impact summary. Source: AgricultureSA.io Analysis

#	Priority	Impact	Timeline	Type
1	FMD containment	**R5.6bn/yr + R2-5bn**	24-36 mo	Revenue recovery
2	Citrus SPS defence	**R44.9bn protected**	Ongoing	Revenue protection
3	Leg quarter investigation	**R0.8-1.2bn**	12-18 mo	Production protection
4	Juice processing	**R0.5-1.0bn**	36-48 mo	Import substitution
5	Sugar transition	**85,000 jobs**	5-10 yr	Social protection

The outlined risks and opportunities are not theoretical. Each is anchored in specific 2025 data findings, quantified against observable trade flows, and aligned with institutions holding established regulatory and policy mandates. Taken together, their combined impact is estimated at R10–15 billion in trade value and 85,000 jobs within a managed transition framework. This constitutes a substantial and actionable policy agenda for South African agricultural trade stakeholders.

KEY MESSAGE

Every recommendation names a responsible institution, specifies a mechanism, quantifies the impact, and sets a timeline. Each recommendation is grounded in the 2025 data and directed at named South African institutions with existing mandates.

Further Ongoing Policy Recommendations

Q3 2025 trade outcomes reinforce that, in a volatile global environment, South Africa's agricultural competitiveness depends on safeguarding established markets while strategically expanding into new export destinations.

Logistics Reform and Infrastructure: The Decisive Variable in Sustaining South Africa's Agricultural Trade Surplus

South Africa's agricultural trade performance is increasingly tied to the trajectory of rail and port reform. Transnet formally approved a Customer Collaboration Initiatives framework in November 2025 enabling structured private-sector co-investment in locomotives, wagons and maintenance capacity, while adopting an optimised operating model centred on consolidation hubs, longer trains, maximum payload utilisation and intermodal integration. At the same time, corridor-specific infrastructure interventions are underway across the Cape, Container and Central, and North-East corridors, with a strong emphasis on track rehabilitation, substation reinstatement, flood prevention, sleeper replacement and removal of temporary speed restrictions These reforms signal a shift from structural rail decline toward a blended public-private logistics model aimed at restoring reliability, reducing costs and improving export fluidity.

For agricultural trade, the future implications are direct and material. Horticulture, the dominant contributor to the trade surplus, depends on corridor predictability, reefer plug availability and port velocity, while grain and other bulk commodities rely on scale efficiency and inland connectivity. The revitalisation of 92 branch and feeder lines under a structured RFI/RFP market approach offers the potential to reconnect rural production zones to main corridors and ports, supporting modal shift from road to rail and lowering systemic logistics costs. Port-side capacity signals are equally important. Existing bulk handling capacity, expanded reefer plug infrastructure, and a five-year equipment investment plan exceeding R10 billion collectively indicate that terminal capability is being strengthened, but its effectiveness remains contingent on upstream rail performance.

The strategic conclusion is clear: export growth is constrained by corridor-level systems performance. As citrus, deciduous fruit, grains and processed foods expand, logistics reliability becomes a macroeconomic variable shaping the sustainability of the agricultural trade surplus. Rail reform, branch line concessions, public-private port partnerships and equipment modernisation are therefore not sectoral upgrades but foundational competitiveness levers. The decisive question for the medium term is not whether agricultural exports can grow, but whether logistics execution will keep pace with production capacity and protect South Africa's export resilience in an increasingly competitive global market.

Enhance Trade Agreements and Diplomacy

Enhancing the competitiveness of South Africa's agriculture requires a proactive and structured approach to trade agreements and economic diplomacy. Priority should be given to high-growth markets in Asia and the Middle East. Advancing and modernising Free Trade Agreements (FTAs), Preferential Trade Agreements (PTAs), and broader economic integration arrangements will expand preferential access and reduce exposure to tariff escalation on value-added products. Well-designed agreements also create platforms for regulatory cooperation, dispute resolution, and supply chain integration, strengthening South Africa's credibility as a reliable trading partner. In a global environment marked by shifting trade alliances and supply chain realignment, deeper bilateral engagement will strengthen negotiating leverage, attract investment into export-oriented value chains, and strengthen South Africa's position in emerging markets.

Address Tariff and Non-Tariff Barriers

Targeted efforts to address both tariff and non-tariff barriers remain essential to sustaining and expanding market access for South African agriculture. Trade analyses by the International Trade Centre and domestic institutions such as BFAP and NAMC consistently highlight sanitary and phytosanitary (SPS) measures, technical standards, and divergent regulatory requirements as amongst the most significant constraints facing agriculture exporters, particularly in high-value markets such as the European Union, Middle East, and selected Asian economies. Experience across key value chains demonstrates that coordinated trade diplomacy, structured regulatory dialogue, and strengthened technical cooperation can materially reduce market access delays and compliance costs. Furthermore, progress under regional frameworks, including the African Continental Free Trade Area, emphasizes the importance of harmonised standards and transparent procedures in mitigating non-tariff barriers. Strengthening implementation capacity to resolve SPS constraints, accelerate protocol negotiations, and align domestic regulations with priority trading partners is therefore critical to safeguarding existing market access and unlocking new export opportunities.

Diversify Export Markets

Reducing concentration risk requires continued diversification of export destinations, aligned with South Africa's broader foreign policy and economic diplomacy objectives. Through its focus on SouthSouth cooperation, strategic partnerships with emerging economies, and active participation in multilateral forums, South Africa is already expanding trade relationships beyond traditional European and North American markets and should build on this momentum. Strengthening commercial engagement with Asia, the Middle East, and selected Latin American economies, alongside deepening intra-African trade under existing regional frameworks, will enhance market resilience and reduce exposure to geopolitical tensions, regulatory shifts, and climate-related supply disruptions. A more diversified export footprint will also strengthen South Africas negotiating position in international trade forums and support long-term competitiveness across agricultural value chains.

Position for EU Sustainability Requirements

Maintaining and expanding access to European markets will require credible alignment with evolving sustainability and environmental standards, including elements linked to the EU Green Deal and the Farm to Fork strategy. Producers supplying these markets should progressively integrate traceability, regenerative practices, and robust compliance systems, while ensuring that sustainability transitions remain economically viable and do not compromise domestic food security. Recent impact assessments by BFAP, supported by industry stakeholders including CropLife South Africa, indicate that stricter pesticide residue limits and environmental performance criteria under the EU Green Deal could reshape competitiveness in key South African export sectors such as citrus, table grapes and grains, highlighting the importance of early alignment with these requirements. At the same time, adopting science-based sustainability practices presents opportunities for differentiation in sophisticated markets, strengthening South Africa's reputation as a reliable supplier and supporting long- term access to EU value chains.

South African agriculture is a R266 billion export industry, a R341 million daily foreign exchange earner, and therefore a strategic national asset. The 2025 data confirms that the industry warrants a strategic investment approach.

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DATA ANNEXURES

South Africa's Top Agricultural Export Products per Subsector, 2021–2025. Values in R million

Horticulture Exports | R186.1 billion total

#	Tariff	Product	2021	2022	2023	2024	2025	YoY	CAGR
1	08051010	Fresh oranges	9,800	10,200	12,800	13,490	**16,900**	+25.3%	+10.9%
2	08061000	Fresh grapes	9,300	10,500	13,100	15,400	**16,600**	+7.9%	+12.1%
3	08052110	Fresh soft citrus	5,400	6,800	8,900	10,370	**13,700**	+32.1%	+18.1%
4	08081000	Apples	6,300	7,400	8,800	10,160	**11,600**	+14.2%	+12.8%
5	22041000	Wine	8,200	9,100	10,800	11,750	**11,200**	-4.7%	+6.4%
6	08055010	Fresh lemons	3,600	4,200	5,100	5,990	**9,200**	+53.7%	+17.0%
7	08083000	Pears	2,700	3,200	3,800	4,450	**5,000**	+12.3%	+13.4%
8	08062000	Dried grapes	1,400	1,800	2,500	3,290	**3,900**	+18.6%	+21.6%
9	08026200	Macadamias (shelled)	2,300	2,500	2,800	3,230	**3,400**	+5.1%	+7.2%
10	08104000	Blueberries	2,000	2,200	2,400	2,770	**3,000**	+8.4%	+7.8%
11	22061000	Fermented beverages	1,600	1,900	2,200	2,600	**2,900**	+11.5%	+12.6%
12	08094000	Plums	1,350	1,500	1,800	2,330	**2,600**	+11.5%	+13.1%
13	08044000	Avocados	900	1,100	1,300	1,450	**1,650**	+13.8%	+12.9%
14	07019000	Potatoes	500	600	700	860	**1,060**	+23.5%	+16.2%
15	07031000	Onions	350	400	500	600	**670**	+11.7%	+13.9%
16	08054000	Grapefruit	400	420	450	480	**560**	+16.7%	+7.0%
17	08071900	Melons	250	300	350	400	**480**	+20.0%	+13.9%
18	08025100	Pistachios	200	250	300	380	**440**	+15.8%	+17.1%

Horticulture = HS Chapters 6-8, 13-14, 20 + wine (Ch.22 headings 2204–2206). Source: SARS customs data. AgriSA 2025.

Agronomy Exports | R55.4 billion total

#	Tariff	Product	2021	2022	2023	2024	2025	YoY	CAGR
1	10059090	Maize	6,740	16,000	17,960	12,670	11,100	-12.3%	+10.5%
2	22029010	Non-alc beverages	3,400	3,900	4,600	5,800	4,800	-17.2%	+7.1%
3	22071000	Ethyl alcohol	2,100	2,400	2,700	3,000	3,200	+6.7%	+8.8%
4	21069090	Food preparations	1,480	1,620	2,390	2,770	3,140	+13.1%	+16.2%
5	17019900	Refined sugar	1,690	1,390	2,260	2,220	3,000	+34.9%	+12.1%
6	17011400	Raw cane sugar	2,160	3,110	6,010	4,550	2,770	-39.2%	+5.1%
7	22031000	Beer	1,200	1,500	1,800	2,000	2,200	+10.0%	+12.9%
8	12019000	Soybeans	260	2,700	5,940	1,260	1,980	+58.0%	+50.3%
9	24022090	Cigarettes	1,360	1,260	1,140	1,550	1,970	+27.1%	+7.7%
10	21039099	Sauces/condiments	1,140	1,240	1,370	1,610	1,950	+21.5%	+11.4%
11	17049000	Sugar confectionery	980	1,280	1,510	1,620	1,870	+15.6%	+13.8%
12	12099100	Vegetable seeds	610	690	1,030	1,620	1,770	+9.2%	+23.7%
13	23040000	Soybean oil-cake	1,030	1,580	1,090	1,670	1,770	+6.2%	+11.5%
14	22089090	Spirits	1,200	1,400	1,600	2,200	1,500	-31.8%	+4.6%
15	11031100	Cereal groats/meal	700	900	1,100	950	1,000	+5.3%	+7.4%
16	09011100	Coffee (not roasted)	200	300	400	500	630	+26.0%	+25.8%
17	15071000	Soybean oil (crude)	400	500	550	580	620	+6.9%	+9.2%
18	17019100	Cane sugar (refined)	300	350	400	450	550	+22.2%	+12.9%
19	19059000	Baked products	300	340	380	420	500	+19.0%	+10.8%
20	10019900	Wheat	100	200	300	350	450	+28.6%	+35.1%
21	11042300	Maize meal	250	300	350	380	420	+10.5%	+10.9%

Agronomy = HS Chapters 9-12, 17-19, 21, 23-24 + non-wine Ch.15/22. Source: SARS customs data. AgriSA 2025.

Livestock Exports | R24.8 billion total

#	Tariff	Product	2021	2022	2023	2024	2025	YoY	CAGR
1	03047490	Fish fillets (hake)	1,830	1,930	2,310	2,550	3,390	+32.9%	+13.1%
2	02013090	Fresh bovine meat	1,050	1,370	1,390	1,970	1,880	-4.6%	+12.4%
3	02041000	Lamb carcasses	150	280	390	1,050	1,160	+10.4%	+50.8%
4	03036600	Frozen hake	780	620	680	820	1,080	+32.5%	+6.7%
5	02023090	Frozen bovine meat	850	620	770	1,140	860	-24.5%	+0.2%
6	03074300	Frozen molluscs	1,000	1,090	910	1,630	820	-49.7%	-3.8%
7	04021090	Dairy concentrates	310	400	410	490	700	+44.7%	+17.6%
8	04069099	Cheese	280	300	400	360	660	+82.6%	+18.7%
9	03038900	Other frozen fish	450	540	500	570	580	+1.6%	+5.2%
10	15042000	Fish oils	160	540	630	810	510	-37.9%	+26.1%

Livestock = HS Chapters 1-5, 16 + animal fats (Ch.15 headings 1501–1506). Includes fish/seafood (Ch.3). Source: SARS customs data. AgriSA 2025.

South Africa's Top Agricultural Import Products per Subsector, 2021–2025. Values in R million

Agronomy Imports (14 products)

#	Tariff	Product	2021	2022	2023	2024	2025	YoY	CAGR
1	10019900	Wheat	6,800	8,200	9,400	9,870	**10,600**	+7.4%	+9.3%
2	15119000	Palm oil	6,200	9,800	8,600	9,190	**10,400**	+13.2%	+10.9%
3	10063000	Rice	5,800	7,400	10,200	11,700	**9,700**	-17.3%	+10.8%
4	22089090	Spirits (Scotch etc)	4,200	4,800	5,500	6,200	**6,800**	+9.7%	+10.1%
5	17011400	Raw cane sugar	2,000	2,600	3,200	3,740	**4,800**	+28.2%	+19.1%
6	15121900	Sunflower oil	3,800	5,200	3,400	2,700	**2,000**	-26.0%	-12.0%
7	17019900	Refined sugar	400	500	600	760	**1,800**	+136.9%	+35.1%
8	09011100	Coffee (not roasted)	1,000	1,200	1,400	1,500	**1,700**	+13.3%	+11.2%
9	22029010	Non-alc beverages	1,500	1,800	2,200	2,700	**3,000**	+11.1%	+14.9%
10	21069090	Food preparations	1,200	1,400	1,600	1,900	**2,100**	+10.5%	+11.8%
11	15079000	Soybean oil	800	900	700	650	**720**	+10.8%	-2.1%
12	23040000	Soybean oil-cake	1,200	1,800	1,400	800	**700**	-12.5%	-10.2%
13	22030000	Beer	800	1,000	1,200	1,500	**1,700**	+13.3%	+16.3%
14	18010000	Cocoa beans	400	500	550	600	**650**	+8.3%	+10.2%

Livestock Imports (8 products)

#	Tariff	Product	2021	2022	2023	2024	2025	YoY	CAGR
1	02071490	Poultry (MDM)	3,200	2,800	2,600	2,560	**2,240**	-12.6%	-6.9%
2	02071200	Chicken (whole/parts)	1,100	1,000	900	950	**1,100**	+15.8%	+0.0%
3	05040000	Guts/casings	2,000	2,200	2,400	2,570	**2,500**	-2.6%	+4.6%
4	02071490	Chicken feet	500	550	600	690	**830**	+21.1%	+10.7%
5	02071410	Leg quarters	1,220	600	530	500	**760**	+52.0%	-9.0%
6	16041400	Canned sardines	500	600	650	700	**710**	+1.4%	+7.3%
7	02032900	Pork	400	500	600	650	**680**	+4.6%	+11.2%
8	03061700	Crustaceans	300	400	500	550	**600**	+9.1%	+14.9%

Horticulture Imports (3 products)

#	Tariff	Product	2021	2022	2023	2024	2025	YoY	CAGR
1	20098900	Fruit juice	1,400	1,600	1,800	1,870	**1,720**	-8.3%	+4.2%
2	08030000	Bananas	700	800	900	990	**1,200**	+21.0%	+11.4%
3	20098100	Apple juice conc.	800	900	1,000	1,100	**1,720**	+56.4%	+16.5%

Source: SARS customs data via AgricultureSA.io 2025.

South Africa's Top 20 Agricultural Export Destinations for the period 2021-2025. Values in R Billion.

#	Country	Region	2021	2022	2023	2024	2025	YoY	CAGR	Net
1	Netherlands	EUROPE	20.5	23.8	27.4	28.9	**33.2**	+14.8%	+10.1%	+29.7
2	Zimbabwe	AFRICA	12.0	14.5	17.8	20.3	**20.1**	-1.0%	+10.8%	+18.2
3	United Kingdom	EUROPE	11.5	13.2	16.0	17.4	**19.8**	+14.0%	+11.5%	+16.3
4	Mozambique	AFRICA	8.0	10.2	12.1	12.9	**15.6**	+21.0%	+14.3%	+13.5
5	Namibia	AFRICA	10.2	11.5	13.0	15.0	**14.3**	-4.4%	+7.0%	+10.2
6	Botswana	AFRICA	9.5	10.8	12.5	14.9	**14.0**	-5.9%	+8.1%	+13.6
7	UAE	MIDDLE EAST	6.5	7.8	9.0	9.8	**11.4**	+15.9%	+11.9%	+11.0
8	United States	AMERICAS	7.2	8.5	9.8	10.2	**9.6**	-5.8%	+5.9%	+4.6
9	China	ASIA	6.0	7.2	8.8	9.7	**8.7**	-10.1%	+7.7%	-0.6
10	Lesotho	AFRICA	5.5	6.2	6.8	7.8	**8.0**	+2.3%	+7.8%	+7.2
11	Zambia	AFRICA	4.0	4.8	5.5	6.8	**7.3**	+6.6%	+12.8%	+6.5
12	Eswatini	AFRICA	4.5	5.0	5.8	6.5	**7.1**	+8.4%	+9.5%	-2.1
13	Russia	CIS	2.5	3.2	4.0	4.8	**6.6**	+36.6%	+21.4%	+4.6
14	Germany	EUROPE	3.2	3.8	4.2	4.8	**5.6**	+17.6%	+11.8%	+1.8
15	Spain	EUROPE	2.5	3.0	3.5	4.1	**5.4**	+32.4%	+16.6%	+2.5
16	Canada	AMERICAS	2.5	3.0	3.5	4.2	**5.1**	+21.1%	+15.3%	+4.0
17	DR Congo	AFRICA	2.8	3.2	3.6	4.2	**4.3**	+1.6%	+8.9%	+4.3
18	Saudi Arabia	MIDDLE EAST	1.5	2.0	2.5	3.0	**3.6**	+21.7%	+19.1%	+3.5
19	Italy	EUROPE	2.2	2.5	2.8	3.4	**3.4**	+0.8%	+9.1%	+0.4
20	Portugal	EUROPE	1.2	1.5	1.8	2.2	**3.0**	+34.8%	+20.1%	+2.8

Source: SARS customs data via AgricultureSA.io. 2025. Net = Exports minus Imports (bilateral agricultural balance). Red = bilateral deficit.

South Africa's Agricultural Exports to top 10 African countries: Product-Destination Matrix. 2025. Values in R Million

	Maize	Apples	Beverages	Food Prep	Cereal	Sugar	Poultry	Dairy	Cigarettes	Oils	Total
Zimbabwe	3,200	800	650	900	500	400	200	150	300	180	**20,100**
Mozambique	2,500	600	550	700	450	350	250	120	400	150	**15,600**
Botswana	800	900	700	600	400	200	350	500	180	200	**14,000**
Lesotho	600	400	500	350	300	150	200	180	100	120	**8,000**
Zambia	1,800	250	400	300	200	350	150	80	200	100	**7,300**
Eswatini	777	200	414	250	150	100	180	120	80	316	**7,100**
DR Congo	500	150	600	300	200	400	250	80	350	100	**4,300**
Tanzania	200	100	350	200	150	250	100	50	200	80	**2,800**
Malawi	800	80	200	150	100	200	80	40	150	60	**2,500**
Angola	300	100	250	200	100	150	200	60	100	80	**2,200**

Source: SARS customs data via AgricultureSA.io 2025. Cell shading intensity proportional to value. Totals include products not shown in columns.

Abbreviations

AAMP Agriculture and Agro-processing Master Plan

AGOA African Growth and Opportunity Act

CAGR Compound Annual Growth Rate

CGA Citrus Growers' Association

DTIC Dept of Trade, Industry and Competition

FCM False Codling Moth

FOB Free on Board

IDC Industrial Development Corporation

MSC Marine Stewardship Council

PPECB Perishable Products Export Control Board

SACU Southern African Customs Union

SAMIC South African Meat Industry Company

SARS South African Revenue Service

SAWIS SA Wine Industry Information and Systems

WOAH World Organisation for Animal Health

AfCFTA African Continental Free Trade Area

BFAP Bureau for Food and Agricultural Policy

CCBA Coca-Cola Beverages Africa

DALRRD Dept of Agriculture, Land Reform & Rural Development

EU European Union

FMD Foot-and-Mouth Disease

HS Harmonised System (tariff classification)

ITAC International Trade Administration Commission

NAMC National Agricultural Marketing Council

RPO Red Meat Producers' Organisation

SADC Southern African Development Community

SAPA South African Poultry Association

SASA South African Sugar Association

SPS Sanitary and Phytosanitary (measures)

YoY Year-on-Year

Data Notes

Source: All trade data from SARS customs declarations, accessed and analysed via the AgriCultureSA.io platform.

Period: Agricultural Trade Report for 1 January 2025-31 December 2025. Trends and analysis done on 2021-2025 data.

Currency: All values in nominal South African Rand (ZAR). Average annual ZAR/USD: 2021 ~R14.90; 2022 ~R16.35; 2023 ~R18.40; 2024 ~R18.60; 2025 ~R18.40.

Subsector classification: Livestock (Chapters 1-5, 16, plus Chapter 15 headings 1501–1506); Horticulture (Chapters 6-8, 13-14, 20, plus Chapter 22 headings 2204–2206); Agronomy (Chapters 9-12, 17-19, 21, 23-24, plus remaining Chapter 15 and 22 headings).

Revision note: SARS customs data subject to revision lags of up to 12 months. 2025 values may be revised.

Volume data: Not available for all tariff lines. This report analyses trade by value, supplemented by industry volume estimates.

*Trade calculations are based on SARS Trade Statistics (updated February 2026) and expressed in South African rand (ZAR). Agricultural trade is defined primarily as HS Chapters 1–24. Alternative calculations using HS Chapters 1–20 indicate export growth of 11.1%, while a broader agro-industrial grouping (HS 1–24, 31, 41–48, 50–53) indicates 9.64% growth due to the inclusion of secondary agricultural products.

Disclaimer

This report is compiled from publicly available and third-party data sources deemed reliable at the time of publication. While every reasonable effort has been made to ensure accuracy, completeness, and consistency, data discrepancies may arise due to reporting lags, subsequent revisions, differing classification methodologies, or inherent data limitations. All monetary values and financial figures referenced herein are expressed in South African Rand (ZAR), unless otherwise stated. The analysis and interpretations presented in this report are provided for informational purposes only and do not constitute financial, investment, legal, or policy advice. Additional data sources are listed in the reference section of this report. Neither AgriSA, AgricultureSA.io, nor Reisiger Engineering shall be held liable for any inaccuracies, omissions, or consequences arising from the use of this report

Subsector Classification

Subsector	HS Tariff Chapters	Notes
Livestock	1-5, 16	Including Chapter 15 headings 1501–1506
Horticulture	6-8, 13-14, 20	Including Chapter 22 headings 2204–2206 (wine)
Agronomy	9-12, 17-19, 21, 23-24	Including remainder of Chapter 15 and 22 headings

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