



agriculture, land reform
& rural development

Department:
Agriculture, Land Reform and Rural Development
REPUBLIC OF SOUTH AFRICA

Trade Performance Review of the Agricultural sector of South Africa for 2022

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1. Executive Summary

The purpose of this annual report is to inform sector stakeholders about the status of South Africa’s trade performance of agricultural products by analysing trade flows for the calendar year 2022 compared to 2021. Agriculture products is regarded as primary agricultural products as defined in article 2 annex 1 of the WTO Agreement on Agriculture. The data sources used were SARS data on the EasyData platform of Quantec.

Overview observations on export performance for 2022 over 2021

- South Africa’s exports of agricultural products increased by 18.6% in value terms.
- The total export value of agricultural products was R203 billion for the 2022 calendar year.
- Edible fruits and nuts (HS08) were South Africa’s largest export product group with a value of R70 billion. (35% of the total agricultural export basket)
- Exports of oil seeds and oleaginous fruit (HS12) had the highest annual growth rate of 77.9% per annum from 2021 to 2022.
- The Netherlands was the largest export destination market with an export value of R21 billion. The main products exported to the Netherlands were: Fruit and nuts; Preparations of fruit, vegetables and nuts; and Beverages
- Among the top 10 destination markets identified, South Africa’s exports of agricultural products to China declined at a rate of 0.3% between 2021 and 2022. The main products exported to China in 2022 were Fruit and nuts; Wool and Oilseeds.
- South Africa’s exports to the United Arab Emirates had the highest percentage growth of 31.3% p.a. in value terms. The major products exported were Fruit and nuts, Beverages and Meat.

Overview observations on import performance for 2022

- South Africa’s imports of agricultural products increased by 16.3% p.a. in value terms.
- South Africa’s total import value of agricultural products from the world was R115 billion.
- Animal or vegetable fats and oil (HS15) were South Africa’s largest import product group with a value of R19 billion, compromising a 17% share of total agricultural imports. Fats and oils had the highest annual import growth rate of 47.3% among the

top 10 products imported. The fact that it is also the fastest growing export product is an indication that South Africa import and re-export from this category products.

- Indonesia was the largest supplier of agricultural products to South Africa, with an import value of R10 billion (8% of the total agricultural import basket). The main products imported from Indonesia were Animal, vegetable or microbial fats and oils; Cocoa and its preparations and Cereal preparations.
- Imports from Eswatini declined the most at an annual rate of 2.6% per annum. The three major products imported from Eswatini were Sugars; Cereal preparations and Residues from food industries.
- Imports from Germany grew at a relatively higher rate of 43.6%. The top three products imported from Germany were Miscellaneous edible preparations; Beverages and Cereals

Figure 1 below illustrates the trend in trade of agricultural products over at the past five years (2018-2022).

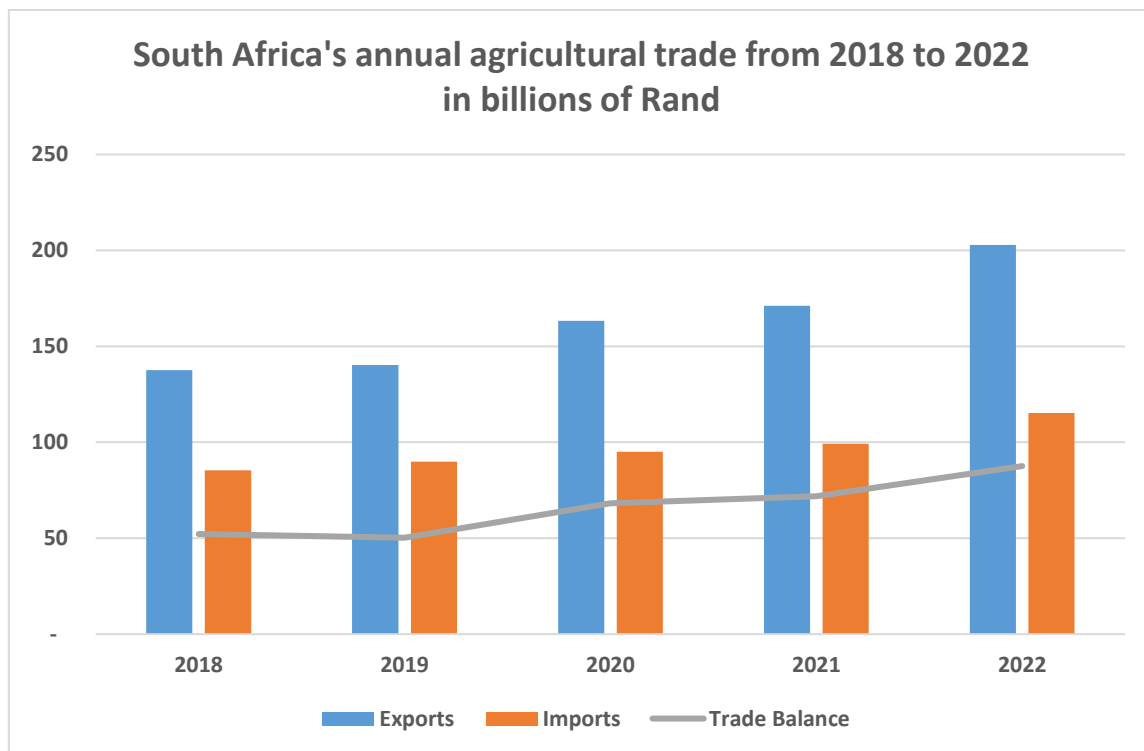


Figure 1: Annual series of South Africa’s agricultural trade flow from 2018 to 2022 in billion Rand

Source: Quantec EasyData, 2022

Figure 2 illustrates trade flow of agricultural products on quarterly basis over the past two years.

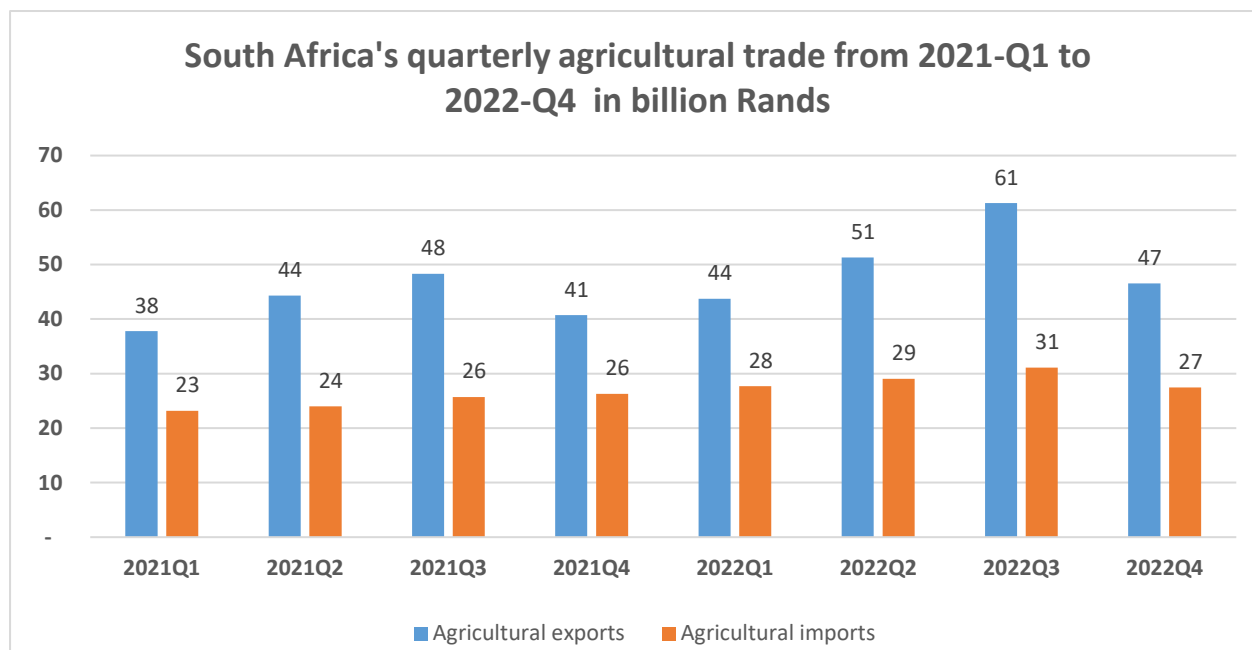


Figure 2: Quarterly series of South Africa's agricultural trade flow for 2021 and 2022 in billion Rand

Source: Quantec EasyData, 2022

2. Analysis of South Africa's major agricultural export markets and product drivers for 2022

Table 1: South Africa's top 10 largest export destinations for agricultural products by value in 2022

Partner Country	Values (Billion Rands) 2021	Values (Billion Rands) 2022	Share of total exports by value	Growth change from 2021 to 2022	Top 3 product groups exported into major markets (2HS)
C0: World	171.14	202.89	100%	18.6%	
Netherlands	18.64	21.18	10.4%	13.6%	Fruit and nuts; Preparations of fruit, veg and nuts; Beverages
United Kingdom	13.31	13.68	6.7%	2.8%	Fruit and nuts; Beverages; Sugars
Botswana	11.04	12.02	5.9%	8.9%	Cereals; Beverages; Cereal preparations
Namibia	10.10	11.49	5.7%	13.8%	Beverages; Cereals; Sugars
Mozambique	7.69	9.76	4.8%	26.9%	Miscellaneous edible preparations; Beverages; Meat

Partner Country	Values (Billion Rands) 2021	Values (Billion Rands) 2022	Share of total exports by value	Growth change from 2021 to 2022	Top 3 product groups exported into major markets (2HS)
China	8.94	8.92	4.4%	-0.3%	Fruit and nuts; Wool; Oilseeds and oleaginous fruits
United States	7.07	8.45	4.2%	19.6%	Fruit and nuts; Beverages; Preparations of fruit, veg and nuts
Zimbabwe	6.75	8.23	4.1%	21.9%	Animal or veg fats and oils; Cereals; Residues from food industries
United Arab Emirates	5.54	7.27	3.6%	31.3%	Fruit and nuts; Beverages; Meat
Lesotho	6.27	7.09	3.5%	13.1%	Cereals; Beverages; Meat

Source: Quantec EasyData, 2022

In 2022 the top ten export destination markets for South Africa's agricultural exports contributed about half of the total export value of R203 billion. From 2021 to 2022, the total value of exports increased by 18.6% p.a., a higher growth rate compared to the previous period which was at a rate of 8.3% between 2020 and 2021.

The **Netherlands** remained the largest export destination market for South Africa's agricultural products with a value of R21 billion, higher than the value of R19 billion reported for 2021. Netherlands was the largest destination market for the past six years. Much of the fruit exports to Europe goes through the ports of the Netherlands. The Netherlands received a 10.4% share of South Africa's agricultural total exports at a growth rate of 13.6% p.a. Growth was lower compared to the previous period at a rate of 9.6% p.a. for 2021. The top three products exported to the Netherlands were Edible fruit and nuts, Fruit and vegetable preparations and Beverages.

The United Kingdom was the second largest export destination market with an export value of R14 billion and export share of 6.7% of the total agriculture export basket. The UK had an export growth rate of 2.8% p.a. from 2021 to 2022. The top three product exports to the UK were Fruit and nuts; Beverages and Sugars.

Botswana was the third largest export destination market with a value of R12 billion. Exports of agricultural products to Botswana increased by 8.9%, at a relatively lower rate compared to the growth of 10.2% p.a. reported for the previous period 2021 over 2020. The market share of agricultural products that went to the Botswana was 5.9% of the total agricultural products exported. The top three product exports to the market were Cereals; Beverages and Cereal preparations.

Namibia remained the fourth largest export destination market for South Africa's agricultural products with a value of about R12 billion and an export share of 5.7% of total agricultural products exported. The annual export growth rate was 13.8% p.a. compared to the negative rate reported in the previous period 2021 over 2020. The top three products exported to Namibia were: Beverages, spirits and vinegar; Dairy produce; and Cereals.

Mozambique was the fifth largest export destination market with a value of R10 billion and a market share of 4.8% of the total agricultural export produce basket. Exports from South Africa to Mozambique increased by 26.9% p.a. The top three product exported to the market were Miscellaneous edible preparations, Beverages and Meat.

2.1. Export country market growth analysis for 2022

Table 2: South Africa's fastest growing and declining agricultural export markets in 2022

Growing export markets during 2022 over 2021			
Top 3 growing markets	Values (Billion Rands) in 2022	Export growth (%)	Top 3 products driving export growth and their individual growth percentage (2HS)
Taiwan	5.67	167%	Cereals (255%) Fruit and nuts (3%) Fruit, veg and nuts preparations (29%)
Vietnam	4.33	108%	Cereals (213%) Edible fruit and nuts (0.4%) Oil seeds and oleaginous fruits (13 481%)
Malaysia	4.14	96%	Edible fruit and nuts (15%) Oil seeds and oleaginous fruits (9 133%) Sugars (188%)
Shrinking export markets during 2022 over 2021			
Top 3 shrinking markets	Values (Billion Rands) in 2022	Export decline (%)	Top 3 products driving export decline and their percentage decline (2HS product level)
Spain	1.62	-34%	Edible fruit and nuts (-22%) Sugars (-33%) Fruit, veg and nuts preparations (-78%)
Hong Kong	1.80	-14%	Edible fruit and nuts (-13%) Meat (-49%) Fruit, veg and nuts preparations (-24%)
China	8.92	-0.26	Wool (-29%) Beverages (-29%) Fruit, veg and nuts preparations (-30%)

Source: Quantec EasyData, 2022

Table 2 shows growing and declining markets for SA's export destinations from the 2021 to 2022 year with a minimum export value that is greater than or equal to one billion Rand. The identification of products driving growth and decline to those markets was based on the top three products with positive and negative growth, respectively. South Africa's exports of agricultural products to Taiwan, Vietnam and Malaysia had the fastest growth in value terms with growth rates of 168%, 108% and 96% p.a., respectively. Exports of Cereal, Fruit and nuts and Fruit and vegetable preparations contributed the most to export growth to Taiwan. Cereals, Edible fruit, nuts and Oilseeds contributed the most to the fast growth rate of exports

to Vietnam. Fruit and nuts, Oilseeds and Sugars exports contributed to the fast growth rate to the Malaysian market.

Exports to Spain, Hong Kong and China declined at the fastest rate of -34%, -14% and -0.3%, respectively. Edible fruits and nuts, Sugars and Preparations of fruit and vegetables attributed to the decline of South Africa's exports to the Spain market. Exports of Fruit and nuts, Meat and Preparations of fruit and vegetables attributed to the decline of exports to Hong Kong. Wool, Beverages and Preparations of fruit and vegetables were significant drivers of export decline to the Chinese market.

2.2 Export market analysis at 2 HS product group level for 2022

Table 3: South Africa's top 10 major agricultural export product groupings by value in 2022

Sub-sector description	Exported value (Bill Rands) in 2022	Share in SA total agriculture exports (%)	Sub-sector growth (%)	Top 3 products exported within the sub-sector on 4HS product level	Top 3 export markets by value
Agriculture	202.89	100			
HS 08: Edible fruit and nut	70.12	34%	11%	Citrus fruit; Grapes; Apples, pears, quinces	Netherlands, UK, China
HS 10: Cereals	24.94	12%	69%	Maize corn; Wheat and meslin; Rice	Taiwan, Japan, Vietnam
HS 22: Beverages, spirits and vinegar	23.44	12%	14%	Wine; Ethyl alcohol; Waters	UK, Botswana, Namibia
HS 20: Preparations of vegetables, fruit, nuts	11.19	6%	16%	Fruit juices; Edible parts of fruit and nuts; Preserved vegetables, excl. by vinegar and acetic acid	USA, Netherlands, Botswana
HS 15: Animal or vegetable fats and oils	8.40	4%	51%	Sunflower, safflower or cotton seed oil and its fractions; Soya-bean oil and its fractions; Margarine	Zimbabwe, Botswana, Namibia
HS 21: Miscellaneous edible preparations	6.85	3%	16%	Food preparations, nes; Soups and broths; Ice cream and other edible ice	Mozambique, Botswana, Zimbabwe
HS 17: Sugars and sugar confectionery	6.81	3%	19%	Cane or beet sugar; Sugar confectionery; Other sugars	Namibia, UK, Croatia
HS 23: Residues and waste from the food industries;fodder	6.68	3%	27%	Animal feeding preparations; Oilcake and other solid residues; Flours, meals and pellets	Zimbabwe, Namibia, Botswana

Sub-sector description	Exported value (Bill Rands) in 2022	Share in SA total agriculture exports (%)	Sub-sector growth (%)	Top 3 products exported within the sub-sector on 4HS product level	Top 3 export markets by value
HS 12: Oil seeds and oleaginous fruits;	6.18	3%	78%	Soya beans; Sowing seeds, fruit and spores; Swedes, mangolds, alfalfa, fodder roots, hay	Malaysia; Mozambique; China
HS 19: Preparations of cereals	5.50	3%	25%	Malt extract; Roasted or swelling cereal foods; Bread, pastry, cakes and biscuits	Botswana, Namibia, Mozambique

Source: Quantec EasyData, 2022

The top 10 agricultural export product on 2HS level groupings as in table 3 had combined an 83.9% share of total agricultural exports.

In 2022, **Edible fruits and nuts** remained the leading product grouping with an export value of R70 billion, ending higher than the previous years' export value of R65 billion. Fruits and nuts had a market share of 35% of South Africa's agricultural exports and an annual export growth rate of 10.6% per annum for 2022 over 2021. A growth of 4.3% was reported in the previous period 2021 over 2020. The main export product groups within this grouping were Citrus fruits, Grapes and Apples, pears and quinces. The top three destination markets were the Netherlands, the United Kingdom and China.

Cereals were the second largest group with an export value of R25 billion and a share of 12.3% of South Africa's agricultural exports. From 2021 to 2022 cereals had a growth rate of 68.7% per annum and the main export products were Maize corn, Wheat, meslin and Rice. The top three destination markets for cereals were Taiwan, Japan and Vietnam.

Beverages, spirits and vinegar was the third largest export product group with an exported value of R23 billion and a share of 11.6% of South Africa's agricultural exports basket. From 2021 to 2022, the export growth rate of Beverages, spirits and vinegar exports increased by 13.6% p.a. The main beverages exports from the product groups were Wines; Ethyl alcohol with strength more or equal to 80% and Waters. The top three destination markets were the United Kingdom, Botswana and Namibia.

Preparations of vegetables, fruit and nuts were the fourth largest group with an export value of R11 billion and a share of 5.5% of South Africa's agricultural exports. From 2021 to 2022 cereals had a growth rate of 15.8% per annum and the main export products were Fruit juices, Edible parts of fruit and nuts and Preserved vegetables. The top three destination markets were the United States, Netherlands and Botswana.

Animal, vegetable or microbial fats and oils was the fifth largest product group with an exported value of R8 billion and a share of 4.1% of total agricultural product exports. Fats and oils had the highest growth of 51.3% between 2021 and 2022. The top three products were: Sunflower, safflower or cotton seed oil and its fractions; Soya-bean oil and Margarine. The top three destination markets for products in this grouping were Zimbabwe, Botswana and Namibia.

3. Analysis of South Africa's major suppliers of imports of agricultural products for 2022

Table 4 below shows the top ten supplier markets of agricultural products to South Africa with: imported values; share in South Africa's imports; the import growth rate from 2021 to 2022; as well as the top three products imported by South Africa from the partner countries.

Table 4: South Africa's top 10 suppliers of agricultural product imports in value during 2022

Top 10 import markets	Imported value 2021 (Billion Rands)	Imported value 2022 (Billion Rands)	Share in SA's imports (%)	Import growth 2021-2022 (%)	Top 3 products imported into major markets (2HS)
World	99.19	115.30	100	16%	
Indonesia	6.83	9.56	8%	40%	Animal or veg fats and oils; Cocoa and its preparations; Cereal preparations
Brazil	5.35	6.77	6%	26%	Meat; Cereals; Products of animal origin
Thailand	5.88	6.67	6%	14%	Cereals; Dextrins and other modified starches; Fruit, veg and nuts preparations
China	4.69	5.74	5%	22%	Fruit, veg and nuts preparations; Products of animal origin; Peptones and their derivatives; Sugars
Swaziland	5.54	5.40	5%	-3%	Sugars; Cereal preparations; Residues from food industries
Argentina	5.05	5.10	4%	1%	Cereals; Residues from food industries; Animal or veg fats and oils
France	3.98	4.93	4%	24%	Beverages; Dairy produce, Miscellaneous edible preparations
Germany	3.13	4.49	4%	44%	Miscellaneous edible preparations; Beverages; Cereals
Australia	3.09	4.35	4%	41%	Cereals; Meat; Oilseeds and oleaginous fruits
Namibia	2.97	4.21	4%	42%	Live animals, Beverages, Cereal preparations

Source: Quantec EasyData, 2022

In 2022 **Indonesia** was South Africa's largest supplier of agricultural import products with the value of R10 billion and an import market share of 8.3%. South Africa's imports of agricultural products from Indonesia increased by 40% per annum from 2021 to 2022. The main three products imported from Indonesia were Animal, vegetable or microbial fats and oils; Cocoa and its preparations and Cereal preparations.

Brazil was the second largest supplier with the value of R7 billion and a share of 5.9% of South Africa’s agricultural imports. From 2021 to 2022 the annual imports increased by 26.5%. The three major products imported from Brazil were Meat; Cereals and Products of animal origin.

Thailand was South Africa’s third largest supplier of agricultural products, with an imported value of R7 billion and a market share of 5.8% of South Africa’s agricultural imports. South Africa’s imports from Thailand had a growth rate of 13.5% per annum between 2021 and 2022. The main products imported were Cereals; Dextrins and other modified starches and Preparations of fruit, vegetables and nuts.

China was the fourth largest supplier of agricultural products to South Africa with a value of R6 billion and a market share of 5% of South Africa’s total agricultural imports. Between 2021 and 2022 South Africa’s imports of agricultural products from China increased by 22.4% per annum. The top three products imported from the partner country were Preparations of fruit, veg and nuts; Products of animal origin and Peptones and their derivatives.

Eswatini was the fifth largest supplier with a value of R5 billion and a market share of 4.7% of South Africa’s agricultural imports. Between 2021 and 2022 imports from Eswatini decreased by 2.6% per annum. The main three products imported from the partner country were Sugars; Cereal preparations and Residues from the food industry.

3.1. Import country market growth analysis for 2022

Growing and declining supplier markets of agriculture products to South Africa

Table 5 below shows the fastest growing and declining supplier import markets of agricultural products for South Africa. Import suppliers that had an imported value greater or equal to one billion Rand were considered.

Table 5: South Africa’s fastest growing and declining suppliers (imports) of agricultural products in 2022

Growing import markets during 2022 over 2021			
Top 3 growing markets	Values (Billion Rands) in 2022	Import growth (%)	Top 3 products driving import growth and their individual growth percentage (2HS)
Bulgaria	2.82	200%	Animal or vegetable fats and oil (228%) Cocoa and its preparations (37%) Cereal preparations (69%)
Romania	1.00	134%	Animal or vegetable fats and oil (150%) Cereal preparations (47%) Coffee, tea, mate and spices (79%)
Poland	3.03	67%	Cereals (185%) Miscellaneous preparations (20%) Cereal preparations (20%)

Shrinking import markets during 2022 over 2021			
Top 3 shrinking markets	Values (Billion Rands) in 2022	Import decline (%)	Top 3 products driving import decline and decline percentages for 2HS product groups
Spain	1.99	-2%	Meat and edible meat offal (-70%) Fruit and nuts (-26%) Residues from food industries (-9%)
Netherlands	3.57	-17%	Residues from food industries (-14%) Beverages (-5%) Animal or vegetable fats and oil (-74%)
United States	3.86	-9%	Meat (-29%) Miscellaneous preparations (-19%) Cereals (-10%)

Source: Quantec EasyData, 2022

The three fastest growing import suppliers for South Africa were Bulgaria, Romania and Poland. The top three declining import suppliers were from Spain, Netherlands and the United States. Imports of Animal or vegetable fats and oils; Cereals; as well as Cereal preparations were the product groups driving the fastest growing import supply. Imports of Meat and animal or vegetable fats and oils had the highest contribution towards a decline in growth of imports from the top three declining in growth markets.

3.2. Imports market analysis at 2 HS product group level for 2022

Table 6 below shows the imported value per product group: product grouping share; percentage growth from 2021 to 2022; the top three products imported in the respective product group; and the top three import markets for South Africa.

Table 6: South Africa's top 10 major agricultural import product groupings by value during 2022

Sub-sector description	Imported value (Bill Rands) in 2022	Share in SA total agriculture imports (%)	Sub-sector growth (%)	Top 3 products imported within the sub-sector on 4HS level	Top 3 import markets by value
Agriculture	115.30	100	16%		
HS15: Animal or vegetable fats and oils	19.00	16%	47%	Palm oil and its fractions; Sunflower, safflower and cotton seed oil; Soya-bean oil and its fractions	Indonesia, Malaysia, Bulgaria
HS 10: Cereals	18.99	16%	28%	Wheat and meslin; Rice; Maize corn	Thailand, Australia, Poland
HS 22: Beverages, spirits and vinegar	11.21	10%	26%	Undenatured ethyl alcohol; Waters; Malt beer	UK, France, Namibia

Sub-sector description	Imported value (Bill Rands) in 2022	Share in SA total agriculture imports (%)	Sub-sector growth (%)	Top 3 products imported within the sub-sector on 4HS level	Top 3 import markets by value
HS 02: Meat and edible meat offal	6.57	6%	-15%	Poultry meat and edible offal; Bovine, swine, sheep, horses, asses, mules' edible offal; Swine meat	Brazil, USA, Argentina
HS 17: Sugars and sugar confectionery	6.06	5%	-0.8%	Cane or beet sugar; Sugar confectionery; Other sugars	Eswatini, China, Zambia
HS 21: Miscellaneous edible preparations	5.98	5%	11%	Food preparations ; Coffee, tea and mate extracts, essences, and concentrates; Sauces, mixed condiments, and seasonings	Germany, Netherlands, USA
HS 23: Residues and waste from the food industries	5.81	5%	-21%	Animal feeding preparations; Oilcake and other solid residues; Bran, sharps and other residues	Argentina, Netherlands, France
HS 20: Preparations of vegetables, fruit, nuts or other parts of plants	4.71	4%	27%	Fruit and vegetable juices; Fruit, nuts and other edible parts of plants; Preserved tomatoes	China, Italy, Belgium
HS 19: Preparations of cereals, flour, starch or milk; pastrycooks' products	4.09	4%	20%	Breads, cakes, biscuits, pastry containing cocoa; Pasta; Malt extract, flour preparations, groats and other starches	Namibia, Italy, Eswatini
HS 01: Live animals	3.76	3%	24%	Live bovine animals; Live sheep and goats; Live poultry	Namibia, Botswana, UK

Source: Quantec EasyData, 2022

The top 10 import product groups made 75% of total agricultural imports.

In 2022, **Animal or vegetable fats and oil** was the largest product group imported with a value of R19 billion. Between 2021 and 2022, imports of Animal or vegetable fats and oils had growth rate of 47.3% p.a. and a market share of 16.5% of total agriculture imports. The top three products imported within this group during the reporting period were Palm oil, Safflower and cotton seed oil and Soya-bean oil and its fractions. Imports of fats and oils were mainly from Indonesia, Malaysia and Bulgaria.

Cereals were the second largest import product group with an imported value of R19 billion and a market share of 16.8% of agricultural imports. From 2021 to 2022, the Cereals group had an import growth rate of 28% per annum. The top three products imported during the reporting year were Wheat, Rice and Maize corn. The top three suppliers were Thailand, Australia and Poland.

Beverages, spirits and vinegar product group was the third largest product group imported with a value of R11 billion and a market share of 9.7% of agricultural imports. Between 2021 and 2022 the product groups reported a growth rate of 26.1% per annum. The three major import products into South Africa were Undenatured ethyl alcohol, Waters and Malt beer. The three main suppliers of beverages were the United Kingdom, France and Namibia.

Meat and edible meat offal was the fourth largest product group of imports with an imported value of R7 billion and a market share of 5.7% of agricultural imports between 2021 and 2022. Import growth was -14.9%. The top three import products were Poultry meat and edible offal; Fresh pork and Fresh, chilled or frozen edible offal of bovine, swine, sheep, goats, horses, asses, mules or hinnies. The top three supplier partners were Brazil, United States and Argentina.

Sugars and sugar confectionery was the fifth largest product group imported with a value of R6 billion and a market share of 5.3% of South Africa's total agricultural imports. The product group's imports decreased by 0.8% per annum from 2021 to 2022. The top three products imported under this grouping were Cane or beet sugar; Sugar confectionery and Other sugars. The top three supplier partners were Eswatini, China, Zambia.