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**AFRICA FOOD
MARKET**



SRI LANKA EXPORT DEVELOPMENT BOARD
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1. COUNTRY OVERVIEW

South Africa has it all: warm weather, stunning views, a lot of wildlife and biodiversity, high mountains as well as vast savannahs, beaches and coastal wetlands, grasslands and forests, modern vibrant cities and a vibrant economy. South Africa is a middle-income country with a population growth of 1.2%, \$351 billion GDP in 2021 and developed agribusiness sector plays a significant role in job creation and economic growth. Real GDP is forecast to increase by 2.1% per annum from 2020 to 2025. South Africa's strategic location at the southern tip of the African continent has meant that the region has always attracted attention from abroad. South Africa registered a higher export trade flow than the regional average in 2020.

- In 2019, total merchandise exports amounted to US\$ 90 billion
- The share of travel in service-related exports is lower than the regional average in 2020
- In 2020, total services-related exports amounted to US\$ 7.8 billion
- Inward FDI amounted to US\$ 4,624.4 million in 2019

South Africa's agricultural sector is very diverse due to different types of soils and the large variety of climates and vegetation within the country. South Africa spans across seven different climatic regions from semi-desert to subtropical and Mediterranean. A lot of different types of farming can be found. Production ranges from crops and mixed farming in areas with enough rainfall to cattle and sheep farms in the more arid regions.

In many South African regions, the biggest limitation is the availability of water for agricultural production often caused by uneven and not reliable rainfall. Like in many African countries' maize is most popular and grown in nearly all areas, followed by wheat, sugar cane and sunflowers. Those products are mainly destined for the local market. However, South Africa exports significant



volumes, most notably of deciduous fruits such as citrus (orange, lemon, soft citrus, grapefruit, Valencia fruit, around half of all exported fruit), grapes, apples, pears and quinces; wine, sugar and flowers as well as nuts (macadamia). High-quality South African wines as well as teas such as rooibos and Honeybush teas are particularly in demand in Europe.

The food processing industry is the largest manufacturing sub-sector, accounting for around 20% both of employment in manufacturing and GDP generated by manufacturing. 70% of raw materials needed for the food processing sector are sourced locally. (Union, 2020)

1.1 Agri Business in South Africa

South Africa's agricultural sector is one of the world's most diverse, consisting of corporate and private intensive and extensive crop farming systems, including vegetable, fruit, nuts and grain production. The well-developed commercial farming in South Africa is the backbone to the country's agricultural economy. There are approximately 32,000 commercial farmers in South Africa, of which between 5,000 and 7,000 produce approximately 80% of agricultural output.

South African climate ranges from subtropical to Mediterranean, allowing for a multitude of farming opportunities. The country's biodiversity ensures that products such as grains, fruit and wine are exported and preferred for its exceptional quality.

Compared to the rest of Africa, South Africa has by far the most modern, productive and diverse agricultural economy. South Africa has a well-developed agricultural sector, which will stand the country in good stead in the face of continuing uncertainty both economically and in terms of the weather. There are many factors impacting on the industry – including credit ratings downgrade, land reform concerns, volatile exchange rate, ongoing weather concerns and the latest Covid-19 pandemic.

1.2 Market Overview & Market Entry

The maturity of the South African economy is reflected in the mix of economic sectors:

- Primary (including agriculture, fishing, and mining): 10 percent.
- Secondary (manufacturing, construction, and utilities): 21 percent.
- Tertiary (trade, transport, and services): 69 percent.

Because the South African market is sophisticated, entry should be well-planned, taking into consideration the following factors:

- the demographic income distribution pattern where 10 percent of the population earns 45 percent of national income.
- the price-sensitive nature of consumer demand;
- volatile Rand-dollar exchange rate (the rate tends to be very predictable over the medium term, but can spike in the short term);
- an unreliable and under-capacitated electricity supply network;
- distribution issues, given that large retail centers are concentrated in five metropolitan regions;
- well-developed consumer protection rules and, recently, better enforcement;
- conservative market bias that tends to stick to known suppliers and therefore requires sustained market development, and
- South Africa's position as a stepping-stone for developing market opportunities in Sub-Saharan Africa (the marketing mix should anticipate this medium-term option);
- Localization measures such as the imposition of quotas or tariff increases on imports and local content requirements to prioritize local supply chains
- New data privacy laws such as the POPIA (South Africa's Protection of Personal Information Act) (South Africa - Country Commercial Guide , 2021)

In general, it is recommended to follow the steps below before exporting products to South Africa:

1. Determine whether the product can be exported to South Africa. For some products – most notably meat and fruit/vegetables – countries have to be authorized for export.
2. For meat products, ensure the facility of origin has been authorized for export to South Africa.
3. Depending on the method of import/partner chosen, registration with the South African Revenue Services (SARS) may be necessary. It may be possible to appoint a local agent to do this.
4. Obtain import licenses, permits and certificates prior to shipping.
5. Ensure a health certificate accompanies the shipment.

There are some specific requirements for F&B products imported into South Africa as follows.

Name	Description	Main Products Affected
Import permit for agricultural goods	Obtained from Department of Agriculture, Land Reform and Rural Development (DALRRD); it allows the import of certain agricultural goods. Need 30 days, but if pest control assessment is also necessary the time can be a lot longer. Processing fees vary.	F&V, spirits, confectionery, bakery products, biscuits/cereal bars
Certificate of analysis	Document certifying microbiological and physical/chemical test have been carried out in a lab in the country of export	F&V
Phytosanitary certificate	Document confirming plants/plant products have been inspected according to appropriate procedures and are free from quarantine pests. Translation into English may be necessary	F&V, olive oil,
Veterinary import permit for meat/meat products	To permit the import of meat and meat products. Application should be made 4 weeks before intended import. Fee payable.	Fresh meat, processed meat, dairy, ice cream, baby food
Inspection of animal and processed agricultural goods	A document notifying the arrival of certain animal / processed products, for the purpose of obligatory inspection. To be prepared in the form of a letter, with certain obligatory details to include	Fresh meat, processed meat, dairy, some confectionery, ice cream
Veterinary health certificate for animal products	Document with proof that products of animal origin have been inspected according to appropriate procedures; are not contaminated; and do not carry any contagious diseases	Fresh meat, processed meat, dairy, baby food

CITES permit (Convention on International Trade in Endangered Species)	Document permitting the import of species subject to the convention on International Trade in Endangered Species of Wild Fauna and Flora; if applicable to the species in question.	Fresh meat (only some products)
Certificate of maturation	A document certifying that particular spirit has been stored and matured for a specific period of time. To be obtained from an accredited lab in the country of export.	Wine, Spirits
Certificate of analysis	A document certifying that microbiological tests and physical/chemical tests have been carried out by a suitable lab in the country of origin	Wine, Spirits
Import certificate for liquors	A document permitting the import of liquor products. Fee payable (varies depending on shipment).	Wine, Spirits
Registration of liquor distributors	A document certifying authorization to trade and distribution liquor. Required for importers/traders (and manufacturers) in South Africa. Fee payable, valid 1 year	Wine, Spirits
Certificate of removal for liquors	A document permitting the sale of liquor products in South Africa – to be obtained by importers or distributors	Wine, Spirits

Source: European Commission Market Access Database.

1.2.1 Market access & Entry for Fruits & Vegetables

Countries must be approved for export to South Africa for each fruit or vegetable in question. There is no publically available list of the countries which have access for different products at the time of writing. It is recommended that the corresponding ministry in the Member State in question, or the embassy of the Member State in South Africa be contacted to check if access for a certain fruit or vegetable exists; and they will also be able to clarify if the protocol in place has any preclearance requirements.

Exporters/ producers need to be aware that they will require a number of documents in order to export their fresh fruit and vegetable products to South Africa in addition to general requirements. Some of specific documents are as follows. Some of these documents will incur fees.

- A Phytosanitary Certificate
- An Import Permit for Agricultural goods.
- A Certificate of Analysis

Fresh fruit and vegetable imports require the country of origin to be authorized for export, and this authorization requirement can extend to some specific processed fruit and vegetable products.

1.2.2 Market access & Entry for Meat Products

Countries must be approved for the meat product in question before it can be exported to South Africa. There is no publically available list of the countries which have access for different products at the time of writing. It is recommended that the corresponding ministry in the Member State in question, or the embassy of the Member State in South Africa be contacted to check if access for a certain meat product has been granted.

In addition, individual establishments must also be authorized to export the product in question to South Africa. (For establishments in EU Member States, this is done through prelisting, whereby the authorities of the Member State in question send a list of the establishments which are considered to fulfil requirements for export and should hence be authorized.)



South African authorities then need to approve this list. The prelisted establishments can be changed, though it has been reported that confirmation of acceptance from South African authorities to implement changes to the list of establishments authorized to export can take considerable time in some cases.

A veterinary import permit for meat/meat products is needed, as a veterinary health certificate and document notifying the arrival of the shipment (inspection of animal goods).

Countries and establishments have to be authorized/ approved to export certain meat products to South Africa. This requirement applies to the majority of processed meat products, as well as fresh ones. As with fresh meat, there are a number of specific documents that must be acquired in addition to the general requirements of South Africa in order to export processed meat to the country.



2. FOOD AND BEVERAGE MARKET

South Africa has a strong agricultural production which is supported by having about 10% of its considerable land area being used for crop production. South Africa has a largely dual agricultural economy, there is a developed commercial sector in the country and the majority of people engaged in agriculture are involved in subsistence-oriented practices in rural areas.

South Africa's five largest export destinations for agricultural products are the Netherlands, UK, Botswana, USA and China followed by fruits, cereals, Animal or vegetable fats, Preparations of vegetables and fish products in 2021.

South Africa produces a wide variety of crops and has a substantial number of secondary food processing industries. The sector is developed, highly concentrated and competitive, producing high quality and niche products for local and international markets. South Africa's demand for ingredients for processed foods drives imports for a wide range of products. There are over 1,000 food production companies in South Africa, and the top 10 companies are responsible for more than 80 percent of the industry's production revenue. The sector is well-developed and continues to expand into other African countries. South Africa's food sales totaled \$40 billion in 2021, as the economy began to recover in the wake of the COVID-19 pandemic.

South Africa's key players include national and multinational companies such as Tiger Brands, AVI, Pioneer Foods, Famous Brands, Nestlé, Clover SA, Oceana Group, Lactalis, Kellogg's SA and South African Breweries. Big multinational companies, such as Nestle (Switzerland), Unilever-Unifoods (UK), and Borden (US), operate their own manufacturing plants in South Africa. Some multinationals companies do not have processing facilities, but have arrangements with local manufacturers. For example, branded packaged foods of Knorr are manufactured under license by Robertson's, a major South African spice packer and food processor.

The major product of the baking industry is bread and approximately 70% all flour produced is used for bread baking. Bread is produced by three types of bakery – the plant or industrial bakery, the in-store bakery and the stand-alone bakery. Health and wellness, including low GI and high fibre content, continues to be a key trend in cold breakfast cereals. The commercial agricultural sector in South Africa is highly diversified and is self-sufficient in most primary foods, with the exceptions of wheat, rice, chicken, and oilseeds.



Despite South Africa's well-developed processed food and competitive horticultural sectors (e.g., wine, fresh fruits, and vegetables). (Volker Staffa, Elena Barth, Luana Stefan, 2021)

Sub sectors of South Africa's food-processing sector

- meat processing;
- preserving fruits and vegetables;
- dairy products;
- canning and preserving fish;
- fruit canning and jams;
- vegetable and animal oils and fats;
- grain mill products;
- sugar mills and refineries;
- chocolate and sugar confectionary;
- prepared animal foods;
- bakery products and other food products such as starch and starch products;
- ready-made meals

2021 Value of South African Food and Beverage Production by Sector (USD)

Meat, fish, fruit, etc.	\$12.6 billion
Dairy products	\$3.7 billion
Grains/milled products	\$7 billion
Other food products	\$8.9 billion
Beverages	\$11.6 billion
Total Food and Beverages	\$43.8 billion

National and International Food Processing Companies in South Africa

Tiger Brands	Baked goods, snacks, beverages, baby products, etc.	https://www.tigerbrands.com
Clover	Dairy products, snacks, beverages, etc.	https://www.clover.co.za
SAB	Beer and soft drinks	https://www.sab.co.za
Famous Brands	Sauces, bakery, beverages, food service ingredients, frozen foods, etc.	www.famousbrands.co.za
Montagu	Snacks, candy, dried fruit, nuts, etc.	www.montagusnacks.co.za
Pioneer Foods	Bread and other baked goods, crackers, juice blends and other beverages, etc.	https://www.pioneerfoods.co.za

Distell	Beer, cider, distilled spirits, wine, liqueurs, flavored hard seltzers, etc.	https://www.distell.co.za
RCL Foods	Baked goods, corn meal, flour, sweeteners, frozen foods, pet food, etc.	https://rclfoods.com
Oceana Group	Fish and seafood products	https://oceana.co.za
Cape Food Ingredients	Flavorings, baked goods, dairy products, juice concentrates, etc.	www.capefoodingredients.com
Crown National	Beef, poultry, pork, and mutton products, seasoning blends, sauces, marinades, etc.	www.crownnational.co.za
Carbocraft	Spice blends, freeze-dried fruit, natural fruit bases, additives and processing aids, etc.	www.carbocraft.co.za
Zemcor	Spice and herb blends, marinades, sauces, dehydrated vegetables, soy proteins, starches, etc.	https://www.zemcor.co.za
AVI Limited	Baked goods, snack foods, tea and coffee products, beverages, frozen foods, etc.	https://www.avi.co.za
The Beverage Company	Soft drinks, energy drinks, juice blends, etc.	www.thebeveragecompany.co.za
Nestle	Chocolate and confectionary products, coffee products, baked goods, cereals, dairy products, beverages, etc.	https://www.nestle-esar.com
Mondelez	Baked goods, chocolate and confectionery products, beverages, dairy products, etc.	www.mondelezinternational.com
McCain Foods	Fresh and frozen vegetable products for retail and food service distribution	https://www.mccain.co.za
Unilever	Personal care products, cleaning products, spices, beverages, ice cream products, etc.	https://www.unilever.co.za
Lactalis	Cheese, yogurt, butter, fruit beverages, ice cream, etc.	https://lactalis.co.za
Kellogg's	Cereals, snack foods, baked goods, noodles, etc.	https://www.kelloggs.co.za

2.1 Products with Good Sales Potential in South Africa

- **Chicken Cuts and Edible Offal**

Though South Africa is the region's leading producer of chicken meat, imports are regularly required to supplement local production and meet domestic demand. In 2021, South Africa imported 406,826 tons of chicken products. U.S. exports of bone-in chicken meat to South Africa may enter the country tariff-free under a quota that increases annually after consideration of the poultry production and consumption trends in the country.

- **Almonds**

South Africa's growing demand for almonds far exceeds local production. South Africa is the largest importer of U.S. almonds in Sub-Saharan Africa. In 2021, South Africa imported \$13 million worth of almonds.

- **Essential Oils**

South Africa is a net importer of essential oils used in food and beverages. These products are also referred to as "mixtures of odoriferous substances." In 2021, imports were \$498 million. Eswatini was the market leader with 70 percent. There is potential for growth of Sri Lanka exports in this category due to strong demand.

- **Alcoholic Beverages**

South Africa consumes more than 2 billion liters of alcoholic beverages per annum and is also an important exporter of alcoholic beverages, especially wine. However, South Africa also imports a significant number of alcoholic beverages, especially whiskies. Recent trends indicate that consumers are turning to new and innovative distilled spirits, including a greater prominence in previously disadvantaged areas. South Africans' tastes and preferences are becoming more sophisticated, and the average consumer is increasingly expecting a wider range of alcoholic products on retail shelves. As a result, an extensive range of new imported products has become available in the market.

- **Cereals**

Cereals are mostly consumed as breakfast meal with milk, cheese, yoghurt, butter and as other cooked meals. Main imports are Rice, Wheat and Meslin, Maize or corn & Oats.

Consumers of biscuits and cereal bars in South Africa cross ethnic and monetary lines – many people across the spectrum will consume biscuits and cereals bars on a weekly basis. Consumers in an increasingly urbanized country are seeking a quick convenient food and the practicality of food on the go consumption, and biscuits/cereal bars can fulfil this demand. There is a movement towards healthier eating amongst consumers which is influencing the sales of fruit and protein cereal bars. Cereal bars are largely a quick snack that is consumed on the go, typically consumed more in urban areas than rural ones.

Private labels are increasingly chosen by consumers due to their lower prices, and some brands are associated by consumers with low prices. Nonetheless, middle-income consumers will place a premium on foods offering additional health benefits such as biscuits and cereal bars with high -fibre content, added vitamins and omega oils. (Ngqinani, 2022)

2.2 Food Safety and Regulations

Food safety and quality legislation in South Africa is developed and managed by three main ministries.

- **Department of Agriculture, Land Reform and Rural Development (DALRRD)** recently replaced the Department of Agriculture, Forestry and Fisheries (DAFF) - regulates the quality of agriculture and animal products through a number of acts.
- **The Department of Health (DOH)** - ensures that foodstuffs are safe for human consumption and manages requirements for labelling and hygiene through two main acts. responsible for ensuring the safety of food in South Africa. This service is based on the basic needs of communities and the right of South Africans to make informed food choices without being misled.
- **The Department of Trade and Industry and Competition (DTIC)** - manages canned meat and seafood requirements; is involved in several laws relating to alcohol; and manages intellectual property legislation. It also includes the South African Bureau of Standards (SABS), which is responsible for the development and maintenance of food standards; and performs certification.

2.2.1 Food Control

The main functions of food control include to:

- Administer food legislation. This includes developing and publicizing regulations for food safety, food labelling and related matters as well as developing technical guidelines where necessary
- Inform, educate and communicate to industry, consumers, the media, government departments and other stakeholders about food safety and related matters
- Audit and support Port Health Services in the provinces related to the control of imported foodstuffs. Audit and support Municipal Health Services in metros and district municipalities related to law enforcement, monitoring, information, education and communication and other activities
- Evaluate risk assessments related to agricultural chemicals and food produced through biotechnology for the departments of agriculture and forestry and fisheries
- Co-ordinate routine and specific food monitoring programmes and attend to food safety alerts
- Act as South Africa's National Contact Point for the joint FAO/WHO Codex Alimentarius Commission (CAC), International Food Safety Authorities Network (INFOSAN) and the European Union Rapid Alert System for Food and Feed (RASFF)
- Convene or serve on national and international bodies that deal with food control matters.

The National Department of Health requires that all foodstuffs shall be safe for human consumption in terms of the Foodstuffs, Cosmetics and Disinfectant Act, 1972 (FCD Act). This Act addresses the manufacture, labelling, sale and importation of foodstuffs. Matters regarding the hygiene of foodstuffs are addressed by the National Health Act, 2003, and the hygiene requirements at ports and airports including vessels and aircraft are addressed by the International Health Regulations Act, 1974.

The South African Bureau of Standards (SABS) falls under the jurisdiction of the Department of Trade and Industry and controls canned meat and frozen and canned fishery products through the Standards Act, 1993. (Food Control, 2022)

2.2.2 Food additives

Regulations on food additive are developed and managed by the Ministry of Health in line with the Foodstuffs, Cosmetics and Disinfectants Act no. 54 of 1972. Multiple regulations containing positive lists of additives and the conditions under which they can be used, the key ones of relevance being those identified below:

- Regulations relating to the use of sweeteners in foodstuffs (R733/201).
- List of permissible sweeteners referred to in the regulations relating to the use of sweeteners in foodstuffs.
- Codex General Standards for Food Additives.
- Regulations – Preservatives and antioxidants: Amendment (R60/2009).
- Regulations – Preservatives and antioxidants: (R965/1977).
- Regulations relating to food colorants (R1055/1996).
- Miscellaneous additives in foodstuffs.

2.2.3 Pesticides and Other Contaminants

The Department of Health and DALRRD is responsible for setting the Maximum Residue Limits (MRLs) for pesticides and other contaminants in foodstuffs and ensuring the compliance of food (domestic or imported) with these. As a condition of market access products exported must comply with these residue standards.

- Only chemical remedies registered in terms of The Fertilizers, Farm Feeds, Agricultural Remedies and Stock Remedies Act (Act No. 36 of 1947) are used on the specific crop;
- Crops or agricultural products exported should not exceed the maximum chemical residue limits of the importing countries; and
- Record is kept of the chemical remedies used in spray/fumigation programs and as post-harvest treatment

The main relevant regulations governing maximum levels of other contaminants are as follows: (<https://www.dalrrd.gov.za/Branches/Agricultural-Production-Health-Food-Safety/Food-Safety-Quality-Assurance/Maximum-Residue-Limits>).

- Objects packed in foodstuffs intended for children (R1090/2005).
- Maximum levels for melamine in foodstuffs (R1054/2009).
- Certain solvents in foodstuffs(R314/2006).
- Edible fats and oils (R1316/1996).
- Radio activity in food stuffs (R1931/1990).

2.2.4 Labelling Requirements

The South African Bureau of Standards (SABS, an agency of the Department of Trade and Industry, or DTI) is responsible for the govern labelling requirements in South Africa. Information which must be displayed on food labelling is as follows:

- Product and brand name.
- Net content, size or weight.
- Instructions for use.
- Name and address of manufacturer, importer or distributor.
- Country of origin (“Product of” if all the ingredients come from one country; or “Produced in” / “Packed in” / “Manufactured in” if not all ingredients are from the same country.
- Manufacture and use by date.
- Batch identification.
- List of ingredients used, preceded by the word “Ingredients”.
- Names of any preservatives and colourants.
- List of any allergens.
- In the case of any nutritional claims, the label must contain a nutritional table (identified “Typical nutritional information”) with quantities displayed in standard international units (meaning that kJ must be used for energy content).

This information must be in English. There are some very specific requirements for minimum font height for the name of the product. In brief, this should be at least 4mm for the smallest letter, but if the main panel is under 120cm³ it can be progressively reduced. Essential information should be clear and not under 1/3 of the size of the biggest letter of the name.

Labels must not make claims which could mislead consumers. Furthermore, there are certain words and phrases which are not permitted for use on food labels in South Africa. These include:

- | | |
|---------------|---------------------------------|
| • x% fat free | • wholesome |
| • nutritious | • complete nutrition / balanced |
| • healthy | nutrition or similar words |
| • healthful | |

For certain claims and phrases such as “sugar-free”, “fat-free” and “diabetic friendly”, certain conditions must be fulfilled for them to be used. In addition to the requirements for labelling, there are also requirements for packaging and containers. These are set out in a web of legislation managed by DALRRD (formerly DAFF). The key elements are that containers should be:

- Intact
- Closed/sealed
- Clean
- Moisture resistant
- Suitable and strong enough for handling normal foodstuffs
- Not able to pass foreign tastes, colours, smells or other characteristics

The legislation also sets out provisions for the transit/shipping of goods, including how goods are packed, temperature control and markings on the box. (Wellington Sikuka and Amy Caldwell, 2021)



2.3 Current Situation of Food security in Africa and Emerging Trade Barriers

The Department of Science and Innovation (DSI) and Grain South Africa are partnering on an innovative maize project nixtamalization to boost food security in rural communities. Nixtamalization is a process of preparing maize in an alkaline solution, which is followed by washing and grinding to produce a dough called masa.

A variety of products can be made from this dough, and local villagers who have mastered the process are adding value to smallholder maize production using masa to make steamed bread, fortified porridge, pancakes, yoghurt and snacks.

The National Development Plan (2030), the New Growth Path and the Industrial Policy Action Plan all acknowledge the need for smallholder producers to participate more in agroprocessing initiatives.



Agroprocessing provides additional value to raw products,

and enable producers to improve the profitability and sustainability of their farming business. Agroprocessing is therefore able to contribute to the alleviation of socio-economic challenges, increase employment, and improve food and nutrition security. In South Africa, however, smallholder producers lack access to the agroprocessing industry, owing to a lack of infrastructure, poor knowledge or limited market access.

The nixtamalization project has proved to be a successful form of agroprocessing, providing a number of benefits for unprocessed grain. The process makes grinding maize easier, increases available protein and micronutrient content, improves flavour and aroma, makes starch more digestible, and reduces mycotoxins. The process requires minimal equipment and ingredients and therefore is cheap to carry out. Only a cast iron or stainless-steel pot (instead of an aluminium pot) and slaked lime (calcium hydroxide) are needed. (Africa Agribusiness, 2022)

The rising food price crisis exposes Africa's high dependency on agricultural commodities imports. Both newly imposed trade measures and persistent regional trade obstacles add extra layers on the current threats to the continent's food security

The war on Ukraine has disrupted cereal supplies worldwide. Together, the Russian Federation and Ukraine account for more than 15% of global cereal exports and almost 20% of global fertilizer exports. Destroyed infrastructure, blocked ports, sanctions and countersanctions, and subsequent trade measures have been pushing food prices to historic peaks.

Cereal prices have increased dramatically since the beginning of the war, as the International Trade Centre's Market Price Information tool shows. While a ton of French corn cost \$297 on 23 February, its price rose to \$401 on May, 2022.

Global food prices were already on the rise before the invasion of Ukraine due to a combination of factors, including: high, global demand during the post-Covid-19 recovery and increased use of certain commodities in biodiesel; lower supply caused by poor harvests; high prices of energy-intensive inputs, particularly fertilizers; and rising international freight costs.

This situation may have devastating consequences for over 1.3 billion African consumers. All countries in Africa, except for Zambia, are net cereal importers. In Benin, all wheat imports come from the Russian Federation and Ukraine. North Africa is also highly dependent on imported cereals, an important portion of which has been sourced from the Russian Federation and Ukraine in the past.

Measures and their consequences

Attempting to protect their domestic markets from further price increases, many economies are closing the doors for exports. By May 2022, 52 countries had enacted temporary export restrictions on food items.

On March 2022, Egypt established a three-month ban on exports of essential food items, including wheat, pasta, flour, lentils, fava beans, and cooking oil. Algeria, also highly dependent on imported wheat, followed suit in banning exports of sugar, pasta, oil, semolina, wheat, and all its derived products. On May 2022, India, the world's 2nd largest wheat producer announced to prohibit the export of this crop.

Other countries have liberalized the imports of cereals. The Dominican Republic, El Salvador and the Philippines, for instance, have reduced the tariff on basic food products to cushion the impact of rising prices on consumers. On March 2022, Switzerland lowered their import taxes on animal fodder to which cereals are an important ingredient.

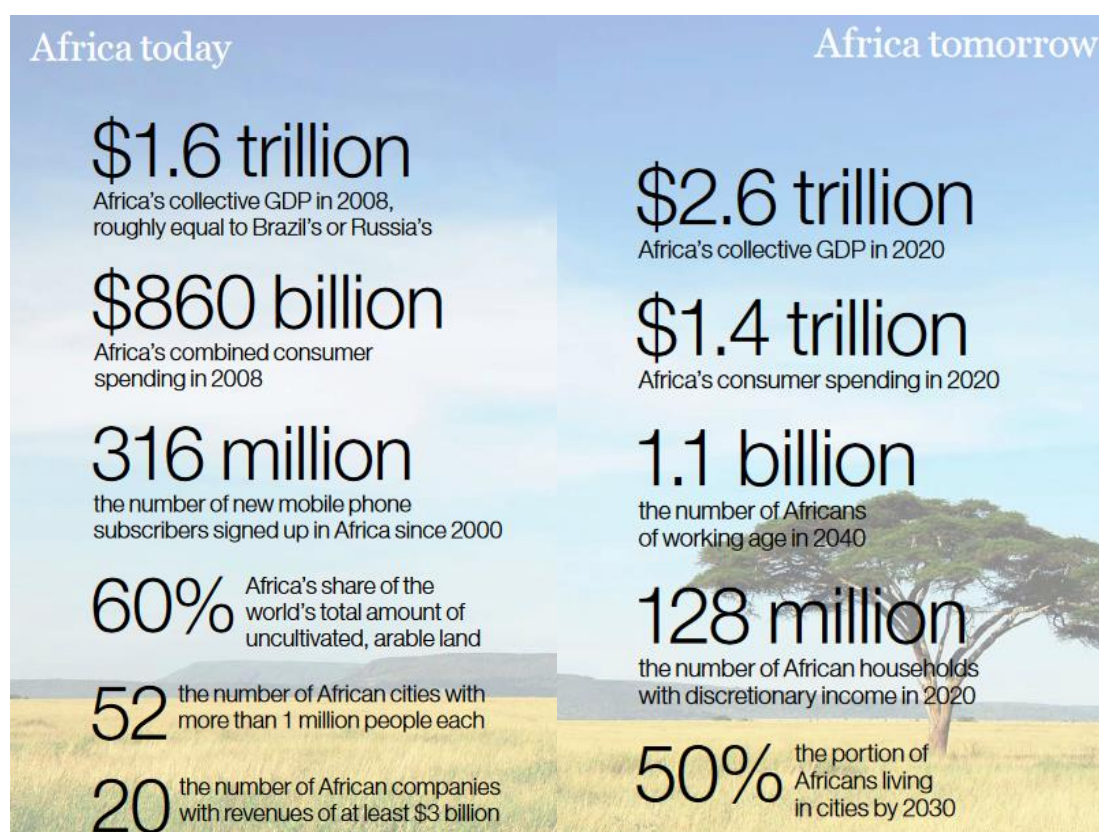
These export restricting measures and some of the import-liberalizing measures, especially when imposed on products for non-human consumption, can backfire and push global prices even higher.

Strengthening intra-African trade ties

In addition to the rise in trade measures of temporary nature, companies in Africa that export and import agricultural commodities will face their usual trade barriers. International Trade Centre data finds that 70% of African food exporters face challenges related to non-tariff measures, which are the official requirements traders need to fulfil when trading. One-third of these reported obstacles depend solely on the exporting country. This means that African countries hold the key to removing one-third of the trade barriers that companies are dealing with daily.

Investments into regional agri-food value chains will be crucial to forging a shield against external supply challenges and fostering sustainable growth. Africa has indeed an abundance of fruits and vegetables, fish, oil seeds, roots and tubers and other agricultural products. To unlock this potential, it is imperative to tackle constraints in accessing relevant machinery and technology, including for food dehydration and processing. (ITC, 2022)

Regional Agreements South Africa is well integrated into regional economic infrastructure as formalized by membership in the Southern African Development Community (SADC). In addition, the Southern African Customs Union (SACU) agreement with Botswana, Namibia, Lesotho, and Swaziland facilitates commercial exchanges. South Africa is a member of the World Trade Organization (WTO), the G20, and the informal BRICS (Brazil, Russia, India, China, and South Africa) association of emerging economies. The African Union has launched the operational phase of the Africa Continental Free Trade Area (AfCFTA), which will be the world's largest free trade area by number of countries once it's fully up and running. the goal is to establish a single market for goods and services across 54 countries, allow the free movement of business travellers and investments, and create a continental customs union to streamline trade - and attract long-term investment. (World Economic Forum on Africa, 2019)



3. RECENT FOOD TRENDS

Developments in the South African market reflects global trends related to increased consumers' interest in health and wellness, convenience, and value-for-money for food products. Some notable trends include following.

- After introduction of a sugar tax in 2018, many local processors tended to reduce sugar content within their beverages to avoid the tax, instead substituting sugar for sweeteners
- Increased consumer demand for new types of products, such as ready-to-eat, frozen desserts and unique beverage products
- Manufacturers increasing private label offerings to meet growing demand from retailers
- Growing consumer interest in food sourcing and sustainability
- Demand for “healthy” foods, organic products, and foods that address specific dietary needs or environmental demands (free-range chicken products, no added sugar, alternative sweeteners, plant-based, locally sourced, low carb, etc.), including “free-from products (gluten, GMO, meat, dairy, etc.)
- Expanding niche markets sectors, including Kosher-certified, Halal-certified, meat alternatives, vegan, vegetarian, and flexitarian products

Agriculture still plays a large role in South Africa with over 600,000 South Africans formally employed in the sector and many more million South African reliant directly or indirectly on agriculture for their employment and incomes. While income distribution in South Africa remains extremely unequal and wage growth has also been unbalanced, there is nonetheless an ever-increasing number of shopping malls and modern grocery retailers in the country.

Fast-food chains are also growing in South Africa with KFC, in particular, growing quickly in the nation. While South Africa can produce an abundance of agri-food products, demand for imported products is increasing. Most notably, beer and poultry meat are areas of growth in demand for overall imported food from all origins. South African imports from the EU are broadly representative of their agri-trade imports for across the world largely due to the availability of agricultural products that are produced domestically in the country.

3.1 Fast Food

The South Africa fast food market size was valued at USD 2.7 billion in 2018 and is expected to reach USD 4.9 billion by 2026, registering a CAGR of 7.9% from 2019 to 2026. South Africa is the largest foodservice market in the sub-Saharan Africa with a large and highly competitive hospitality industry.

According to Southern Africa Food Lab, over the past five years, there has been an increase in consumption of convenience food due to rise in availability of take-away vendors. As per their prediction, fast food items such as hamburgers, koftas, fried chips, and vetkoek, are expected to gain immense popularity and are anticipated to be consumed on a regular basis as part of the daily diet.

Moreover, easy availability of fast food products is expected to influence the cooking practices, that is, decrease the frequency of home cooking and thereby, increasing the dependency on fast food/ ready to eat products.

3.2 Snack Foods

Snacks are more than just treats for consumers, they are also big business for manufacturers and retailers, with snacking becoming a daily occurrence for the modern consumer. In the latest Ipsos (Market researcher) study, the value of snack sales increased by almost half (43%) compared to the previous year. But consumers are more willing to buy healthy snacks and healthfulness is more of a consumer focus than taste or price. Most recently there is a trend in the consumption of hard cheese as a snack in the place of confectionery.

This value growth for snacks is largely attributed to the 4% growth of the total sweet category, with ice cream (5.9%) and sweets (6.3%) recording significant increases. While ice cream and sweets remained stable across most age groups, it is the sweet-toothed 25 – 34 year old's driving the growth. Smaller in size but big in potential there is a slight push back from peanuts (2.3%) in the total savoury category.

In keeping with the increased sales of snacks, most retailers experienced an increase in crispy chips shopping, bar traditional channels with a 1% decrease. Looking at individual retailers specifically, Shoprite benefited the most from an increased volume of sales (6.5%) of chips, with sister company Checkers in second with a 5.4% increase. Pick n Pay recorded a significant decrease (-12.2%) in chip shopping.



Snacking while walking has seen the sharpest increase (12%), followed by snacking at the office (+8%), and snacking while watching sports on TV at home (5%). On the other hand, consumption of snacks on public transport has declined sharply (-22%).

3.3 Ethical and Clean Dining

The increased concern around global warming and climate change has prompted a global movement towards ethical eating. This has resulted in a dramatic rise in vegan and vegetarian cultures. But gluten-free meals as well as reduced sugar intakes have also been widely welcomed during a global health crisis, where the spotlight for almost two years has been on healthy living. many younger consumers are following a “clean eating” diet, based on more whole foods (like fruit, vegetables, lean proteins and healthy fats) and fewer processed or packaged foods. (Schiltz, 2015)

3.4 Other recent market trends

Meat

Distribution of both halal and kosher meat is increasing in the country, and these meats are typically expensive than regular meat. Additionally, South Africa is perceiving growth in free-range meat, with approximately 1% of all meat volume sales in South Africa now being free-range. Organic meat, although a niche market, is gaining some awareness with consumers looking for cleaner and sustainable farming methods in their food.

Fruit & Vegetable

Increasing health and wellness concerns are boosting fruit and vegetable consumption among higher income consumers in particular. Recent issues with droughts are impacting consumption of vegetables to some extent. Some consumers have moved towards waterless cooking as far as possible; and hence have moved away from boiling vegetables in water and adapted the type of vegetables they purchase accordingly. Drought issues have also impacted the market through supply, with vegetables which require less water more widely available, and those which require more water generally in shorter supply and carrying higher prices.

Retailers have begun initiatives to encourage an association of fruit and vegetable products with environmentally friendly practices such as selling fruit and vegetables without plastic packaging (whether fruit is pre-packaged or loose and self-packaged at the point of purchase). The initiative is in its infancy but will help consumers in their association of fruit and vegetables with sustainability.

The market for processed fruit and vegetables is expected to largely grow across the sector with only a few outliers such as shelf stable fruit. This growth is being driven largely through consumers with growing incomes also becoming more health conscious. Manufacturers who incorporate new healthier products which is actively offer both convince and price competitiveness over fresh alternatives are competitive in the South African market.

Dairy

A recent market trend determined by dairy products is that of increased interest in private label products. This is largely driven by price considerations, though private labels are also increasingly trusted and in the case of some products such as yoghurt, an increasingly attractive range of products is offered. Awareness of lactose intolerance has also driven alternatives to milk-based dairy in some product categories such as milk; while health concerns have raised awareness of plant based dairy products in the butter, spreads and cheese segments.

The two main recent trends in milk relate to are (1) the increased consumption of UHT milk (milk that has been processed at ultra-high temperature), due to its price advantage and shelf stability; and (2) increased interest in milk alternatives such as soymilk due to either awareness of lactose intolerance and shifts of some consumers to a plant-based diet. There is also a long-standing interest in flavored milk products (particularly chilled ones); and while the marketplace

is competitive, novel flavours based on fruit juices are still emerging, some of which target higher income consumers.

Further, there are various minor trends among other dairy products. Coffee whiteners (A non-dairy creamer)– the main non-dairy product is increasingly being used in baking due to their rich flavours. At the same time, cream has suffered with domestic supply constrained. Some products, such as shelf stable and ready to eat deserts have managed well due to some main factors such as their generally attractive price, the convenience they can offer and in the case of shelf stable products, the fact that no refrigeration is needed.

Chocolate & Confectionery

The main trend in the sugar confectionery sector is the growing health awareness for consumers. Branding the product quality and concern on consumer health are trends in chocolate & confectionery. Many new and fancy chocolate tablets are being introduced into the market, which at the same time use more health-conscious ingredients such as sustainable cocoa with no artificial colours, preservatives or flavours. Due to health trend consumers try to reduce their sugar consumption and this try to avoid eating too much chocolate to counteract possible health risks such as obesity and high cholesterol.

Health-conscious products will largely cater for middle and upper-income earners who can afford the high-priced products. Lower-income earners will be receptive to cheaper biscuits and cereal bar products such as rusks. Snacking is an increasing trend in the country which will be compounded by urban population growth and rising consumer disposable incomes in the country. Cereal and snack bars are sold through supermarkets at a higher rate than biscuits, with a majority of cereal bars sales coming through this channel. This compliments the convenience trend that is growing amongst urban consumers.

Ice cream

Main trends are Smaller individual packaging, Constant innovation and new ingredients and Ice cream based on famous chocolate brands and bars.

Since it becomes increasingly important for consumers to get as much value as possible for the money, they spend on ice cream, smaller packaged bulk ice cream options. As consumers want to get better value without spending more money it is on trend for manufacturers to come up with new and innovative ideas. And it became common for chocolate manufacturers to release ice cream based on chocolate countlines or brands that customers already know.

Prepared Baby Food

One important trend that affects the baby food market are decreasing birth rates. The biggest trend seems to be the growth of the other baby food category due to continuous innovation in baby rusks, jelly, yoghurt or rooibos tea for example. Those products, which are also often come in smaller packages and sizes mostly attract middle- and low-income consumers which are the majority of consumers in general.

4. STATISTICS

4.1 Sri Lankan agri exports to South Africa

Description	2018	2019	2020	2021	2022 (January To June)
	USD	USD	USD	USD	USD
Tea in Bulk	7,790,446	5,692,582	6,472,812	4,795,701	3,933,894
Coconut Shell Products	1,279,204	962,230	1,361,736	2,798,023	1,580,254
Coconut Fiber Products	3,519,607	2,377,821	2,671,446	3,508,869	1,527,687
Coconut Kernel Products	559,153	654,117	1,269,388	792,690	339,157
Edible Fish Products	1,221	8,264			251,186
Cloves	1,541,168	143,509	382,315	306,527	234,247
Processed Vegetables, Fruits & Juices	469,541	455,462	426,279	375,521	198,594
Ornamental Fish	321,173	296,904	235,465	458,006	159,845
Cinnamon	229,775	221,646	240,658	266,832	117,716
Sugars, Sugar Confectionery & Bakery Products	9,375	42,511	19,493	150,270	100,162
Essential Oils	12,282	33,697	20,395	89,996	70,274
Tea Packets	371,942	437,762	206,905	323,209	33,999
Instant Tea	14,914	15,066	45,624	50,841	15,039
Foliage	12,978	34,835	19,180	17,115	11,630
Plants and Parts of Plants	10,221	2,409	912	200	4,134
Processed Food	111,775	150,038	74,781	193,336	1,359
Other Tea					733
Pepper	10,733	1,095	2,758	980	10
Rice, Cereals, Oil Seed and its Products	16,339	117,857	427,027	996,875	
Oleoresins			45,346	164,221	
Aquatic plants	18,934	25,163	14,304	28,192	
Fruits	2,170	3,120	2,909	1,048	
Beverages	12,050	4,436			
Ginger	1,255				
Turmeric (Curcuma)	898				
Green Tea	718				
Total	16,317,873	11,680,523	13,939,733	15,318,452	8,579,920

4.2 Main agri products imported by South Africa

Value: in Thousand Dollars

Code	Product label	Imported value in 2017	Imported value in 2018	Imported value in 2019	Imported value in 2020	Imported value in 2021
TOTAL	All products	83,293,796.00	94,023,947.00	88,216,179.00	68,704,670.00	93,614,253.00
	Main Agri Commodities 4 HS	3,013,473.00	3,129,455.00	3,003,734.00	2,817,134.00	3,033,901.00
'1006	Rice	522,421.00	523,025.00	449,798.00	546,715.00	504,457.00
'1001	Wheat and meslin	329,141.00	406,513.00	394,593.00	492,844.00	463,458.00
'0207	Meat and edible offal of fowls of the species Gallus domesticus, ducks, geese, turkeys and ...	481,783.00	493,529.00	422,532.00	312,567.00	360,749.00
'0303	Frozen fish (excluding fish fillets and other fish meat of heading 0304)	145,158.00	176,292.00	168,046.00	120,402.00	162,049.00
'2009	Fruit juices, incl. grape must, and vegetable juices, unfermented, not containing added spirit, ...	78,603.00	105,397.00	113,691.00	70,667.00	94,863.00
'1902	Pasta, whether or not cooked or stuffed with meat or other substances or otherwise prepared, ...	42,663.00	49,940.00	49,361.00	54,230.00	86,257.00
'1905	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion ...	75,162.00	81,327.00	83,060.00	72,807.00	77,458.00
'0901	Coffee, whether or not roasted or decaffeinated; coffee husks and skins; coffee substitutes ...	91,998.00	90,289.00	79,596.00	77,466.00	75,933.00
'0203	Meat of swine, fresh, chilled or frozen	72,474.00	73,872.00	62,103.00	44,289.00	72,516.00

'0206	Edible offal of bovine animals, swine, sheep, goats, horses, asses, mules or hinnies, fresh, ...	52,182.00	63,270.00	52,290.00	53,717.00	70,408.00
'0402	Milk and cream, concentrated or containing added sugar or other sweetening matter	39,204.00	35,066.00	45,440.00	55,760.00	61,372.00
'0713	Dried leguminous vegetables, shelled, whether or not skinned or split	44,707.00	36,493.00	27,332.00	43,715.00	56,124.00
'0803	Bananas, incl. plantains, fresh or dried	37,230.00	40,646.00	43,992.00	41,833.00	51,497.00
'0306	Crustaceans, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine, ...	50,136.00	48,214.00	40,001.00	26,959.00	50,043.00
'2008	Fruits, nuts and other edible parts of plants, prepared or preserved, whether or not containing ...	43,378.00	42,815.00	48,975.00	54,430.00	49,237.00
'0406	Cheese and curd	57,617.00	54,751.00	47,006.00	33,256.00	40,222.00
'0802	Other nuts, fresh or dried, whether or not shelled or peeled (excluding coconuts, Brazil nuts ...	31,025.00	40,484.00	46,802.00	38,073.00	39,905.00
'0404	Whey, whether or not concentrated or containing added sugar or other sweetening matter; products ...	18,015.00	26,858.00	38,839.00	40,980.00	38,761.00
'2002	Tomatoes, prepared or preserved otherwise than by vinegar or acetic acid	26,875.00	22,829.00	32,835.00	31,643.00	38,569.00
'0904	Pepper of the genus Piper; dried or crushed or ground fruits of the genus Capsicum or of the ...	41,599.00	32,546.00	28,723.00	33,210.00	37,893.00
'0902	Tea, whether or not flavoured	52,943.00	44,769.00	40,249.00	39,896.00	37,563.00

'0304	Fish fillets and other fish meat, whether or not minced, fresh, chilled or frozen	41,297.00	44,198.00	43,639.00	27,699.00	37,184.00
'1901	Malt extract; food preparations of flour, groats, meal, starch or malt extract, not containing ...	23,029.00	29,400.00	32,089.00	39,346.00	36,765.00
'1005	Maize or corn	134,652.00	44,127.00	132,067.00	35,982.00	31,063.00
'0307	Molluscs, fit for human consumption, even smoked, whether in shell or not, live, fresh, chilled, ...	25,645.00	28,109.00	27,007.00	19,858.00	26,685.00
'2004	Vegetables prepared or preserved otherwise than by vinegar or acetic acid, frozen (excluding ...	12,781.00	20,113.00	19,512.00	14,793.00	26,056.00
'0801	Coconuts, Brazil nuts and cashew nuts, fresh or dried, whether or not shelled or peeled	34,302.00	34,261.00	27,477.00	24,994.00	25,636.00
'0910	"Ginger, saffron, turmeric ""curcuma"", thyme, bay leaves, curry and other spices (excluding ...	18,020.00	16,168.00	17,403.00	25,692.00	25,191.00
'0302	Fish, fresh or chilled (excluding fish fillets and other fish meat of heading 0304)	17,314.00	21,962.00	25,089.00	16,368.00	24,589.00
'0712	Dried vegetables, whole, cut, sliced, broken or in powder, but not further prepared	26,751.00	19,375.00	17,683.00	21,119.00	23,893.00
'2005	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, not frozen ...	25,785.00	20,811.00	21,730.00	23,171.00	23,089.00

'0405	Butter, incl. dehydrated butter and ghee, and other fats and oils derived from milk; dairy ...	27,699.00	50,285.00	21,164.00	30,420.00	20,070.00
'0806	Grapes, fresh or dried	13,609.00	18,636.00	18,537.00	15,937.00	18,939.00
'2007	Jams, fruit jellies, marmalades, fruit or nut purée and fruit or nut pastes, obtained by cooking, ...	15,813.00	17,203.00	15,109.00	13,971.00	15,947.00
'0710	Vegetables, uncooked or cooked by steaming or boiling in water, frozen	14,332.00	19,291.00	21,675.00	17,679.00	15,068.00
'0804	Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens, fresh or dried	13,391.00	13,943.00	16,148.00	15,867.00	14,493.00
'0401	Milk and cream, not concentrated nor containing added sugar or other sweetening matter	22,570.00	10,857.00	11,448.00	3,569.00	14,163.00
'0909	Seeds of anis, badian, fennel, coriander, cumin or caraway; juniper berries	9,624.00	10,617.00	12,196.00	14,863.00	13,462.00
'1904	"Prepared foods obtained by the swelling or roasting of cereals or cereal products, e.g. corn ...	5,560.00	12,049.00	10,974.00	12,295.00	12,218.00
'0602	Live plants incl. their roots, cuttings and slips; mushroom spawn (excluding bulbs, tubers, ...	10,780.00	15,222.00	16,463.00	14,701.00	10,466.00
'0703	Onions, shallots, garlic, leeks and other alliaceous vegetables, fresh or chilled	9,190.00	7,706.00	7,996.00	11,489.00	10,362.00
'0403	Buttermilk, curdled milk and cream, yogurt, kephir and other fermented or acidified milk and ...	6,901.00	6,382.00	7,792.00	10,012.00	9,149.00

'0810	"Fresh strawberries, raspberries, blackberries, back, white or red currants, gooseberries and ...	5,896.00	6,899.00	7,911.00	8,740.00	9,037.00
'0202	Meat of bovine animals, frozen	40,298.00	36,965.00	31,560.00	5,975.00	8,218.00
'0409	Natural honey	5,692.00	6,662.00	7,928.00	9,598.00	7,991.00
'0805	Citrus fruit, fresh or dried	5,354.00	4,421.00	4,986.00	5,697.00	7,327.00
'2001	Vegetables, fruit, nuts and other edible parts of plants, prepared or preserved by vinegar ...	4,412.00	6,410.00	6,659.00	6,070.00	7,256.00
'0709	"Other vegetables, fresh or chilled (excluding potatoes, tomatoes, alliaceous vegetables, edible ...	3,753.00	5,726.00	5,495.00	3,919.00	6,241.00
'0811	Fruit and nuts, uncooked or cooked by steaming or boiling in water, frozen, whether or not ...	2,708.00	5,364.00	4,851.00	5,371.00	5,330.00
'1004	Oats	4,747.00	9,951.00	5,719.00	8,165.00	4,988.00

(Source: Trademap)

4.3 Agri products Trade between Sri Lanka & South Africa

Value: in Thousand Dollars

Product code	Product label	South Africa's imports from Sri Lanka			Sri Lanka's exports to world			South Africa's imports from world		
		Value in 2019	Value in 2020	Value in 2021	Value in 2019	Value in 2020	Value in 2021	Value in 2019	Value in 2020	Value in 2021
'TOTAL	All products	31,936.00	29,299.00	34,359.00	11,974,156.00	10,706,858.00	13,331,249.00	88,216,179.00	68,704,670.00	93,614,253.00
	Main Agri Commodities 4 HS	7,771.00	8,760.00	6,899.00	2,270,544.00	2,330,065.00	2,706,823.00	3,003,734.00	2,817,134.00	3,033,901.00
'0902	Tea, whether or not flavoured	6,216.00	6,691.00	4,726.00	1,322,583.00	1,329,509.00	1,391,647.00	40,249.00	39,896.00	37,563.00
'0801	Coconuts, Brazil nuts and cashew nuts, fresh or dried, whether or not shelled or peeled	240.00	464.00	502.00	99,591.00	92,425.00	127,984.00	27,477.00	24,994.00	25,636.00
'2008	Fruits, nuts and other edible parts of plants, prepared or preserved, whether or not containing ...	194.00	116.00	228.00	124,564.00	177,375.00	229,408.00	48,975.00	54,430.00	49,237.00
'0713	Dried leguminous vegetables, shelled, whether or not skinned or split	53.00	161.00	151.00	7,121.00	21,858.00	12,490.00	27,332.00	43,715.00	56,124.00
'1905	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion ...	11.00	3.00	28.00	14,392.00	15,030.00	18,595.00	83,060.00	72,807.00	77,458.00
'0602	Live plants incl. their roots, cuttings and slips; mushroom spawn (excluding bulbs, tubers, ...	21.00	16.00	19.00	6,928.00	6,656.00	9,895.00	16,463.00	14,701.00	10,466.00
'2009	Fruit juices, incl. grape must, and vegetable juices, unfermented, not containing added spirit, ...	9.00	-	6.00	2,782.00	2,745.00	2,825.00	113,691.00	70,667.00	94,863.00
'1904	"Prepared foods obtained by the swelling or roasting of cereals or cereal products, e.g. corn ...	-	2.00	4.00	401.00	941.00	1,285.00	10,974.00	12,295.00	12,218.00
'0904	Pepper of the genus Piper; dried or crushed or ground fruits of the genus Capsicum or of the ...	1.00	22.00	1.00	47,635.00	54,697.00	124,459.00	28,723.00	33,210.00	37,893.00
'0910	"Ginger, saffron, turmeric ""curcuma""", thyme, bay leaves, curry and other spices (excluding ...	-	1.00	1.00	4,181.00	6,070.00	7,741.00	17,403.00	25,692.00	25,191.00
'0203	Meat of swine, fresh, chilled or frozen	-	-	-	76.00	40.00	98.00	62,103.00	44,289.00	72,516.00
'0206	Edible offal of bovine animals, swine, sheep, goats, horses, asses, mules or hinnies, fresh, ...	-	-	-	16.00	4.00	4.00	52,290.00	53,717.00	70,408.00
'0207	Meat and edible offal of fowls of the species Gallus domesticus, ducks, geese, turkeys and ...	-	-	-	2,619.00	1,960.00	1,110.00	422,532.00	312,567.00	360,749.00

'0302	Fish, fresh or chilled (excluding fish fillets and other fish meat of heading 0304)	1.00	-	-	53,854.00	36,244.00	48,775.00	25,089.00	16,368.00	24,589.00
'0303	Frozen fish (excluding fish fillets and other fish meat of heading 0304)	-	-	-	86,175.00	66,889.00	92,728.00	168,046.00	120,402.00	162,049.00
'0304	Fish fillets and other fish meat, whether or not minced, fresh, chilled or frozen	-	-	-	51,692.00	43,905.00	59,060.00	43,639.00	27,699.00	37,184.00
'0306	Crustaceans, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine, ...	-	-	-	39,219.00	31,128.00	62,708.00	40,001.00	26,959.00	50,043.00
'0307	Molluscs, fit for human consumption, even smoked, whether in shell or not, live, fresh, chilled, ...	-	-	-	12,778.00	7,991.00	11,978.00	27,007.00	19,858.00	26,685.00
'0401	Milk and cream, not concentrated nor containing added sugar or other sweetening matter	-	-	-	20.00	35.00	152.00	11,448.00	3,569.00	14,163.00
'0402	Milk and cream, concentrated or containing added sugar or other sweetening matter	-	-	-	2,568.00	3,007.00	4,576.00	45,440.00	55,760.00	61,372.00
'0404	Whey, whether or not concentrated or containing added sugar or other sweetening matter; products ...	-	33.00	-	7.00	-	2.00	38,839.00	40,980.00	38,761.00
'0405	Butter, incl. dehydrated butter and ghee, and other fats and oils derived from milk; dairy ...	-	-	-	128.00	896.00	285.00	21,164.00	30,420.00	20,070.00
'0406	Cheese and curd	-	-	-	91.00	42.00	62.00	47,006.00	33,256.00	40,222.00
'0703	Onions, shallots, garlic, leeks and other alliaceous vegetables, fresh or chilled	-	-	-	1,345.00	2,035.00	200.00	7,996.00	11,489.00	10,362.00
'0710	Vegetables, uncooked or cooked by steaming or boiling in water, frozen	-	-	-	3,296.00	3,594.00	4,327.00	21,675.00	17,679.00	15,068.00
'0712	Dried vegetables, whole, cut, sliced, broken or in powder, but not further prepared	-	-	-	157.00	188.00	223.00	17,683.00	21,119.00	23,893.00
'0802	Other nuts, fresh or dried, whether or not shelled or peeled (excluding coconuts, Brazil nuts ...	-	-	-	21,972.00	50,763.00	47,001.00	46,802.00	38,073.00	39,905.00
'0803	Bananas, incl. plantains, fresh or dried	-	-	-	15,121.00	15,682.00	15,147.00	43,992.00	41,833.00	51,497.00
'0804	Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens, fresh or dried	-	-	-	4,935.00	4,019.00	4,499.00	16,148.00	15,867.00	14,493.00
'0806	Grapes, fresh or dried	-	-	-	2.00	2.00	6.00	18,537.00	15,937.00	18,939.00
'0901	Coffee, whether or not roasted or decaffeinated; coffee husks and skins; coffee substitutes ...	-	-	-	376.00	329.00	369.00	79,596.00	77,466.00	75,933.00
'0909	Seeds of anis, badian, fennel, coriander, cumin or caraway; juniper berries	-	-	-	98.00	164.00	144.00	12,196.00	14,863.00	13,462.00
'1001	Wheat and meslin	-	-	-	521.00	831.00	3,264.00	394,593.00	492,844.00	463,458.00

'1005	Maize or corn	-	-	-	60.00	46.00	47.00	132,067.00	35,982.00	31,063.00
'1006	Rice	-	-	-	4,977.00	8,668.00	7,549.00	449,798.00	546,715.00	504,457.00
'1901	Malt extract; food preparations of flour, groats, meal, starch or malt extract, not containing ...	-	-	-	2,065.00	4,979.00	2,350.00	32,089.00	39,346.00	36,765.00
'1902	Pasta, whether or not cooked or stuffed with meat or other substances or otherwise prepared, ...	-	-	-	1,804.00	2,782.00	2,608.00	49,361.00	54,230.00	86,257.00
'2002	Tomatoes, prepared or preserved otherwise than by vinegar or acetic acid	-	-	-	9.00	-	8.00	32,835.00	31,643.00	38,569.00
'2004	Vegetables prepared or preserved otherwise than by vinegar or acetic acid, frozen (excluding ...	-	-	-	13.00	12.00	31.00	19,512.00	14,793.00	26,056.00
'2005	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, not frozen ...	-	-	-	139.00	98.00	153.00	21,730.00	23,171.00	23,089.00
'2007	Jams, fruit jellies, marmalades, fruit or nut purée and fruit or nut pastes, obtained by cooking, ...	-	-	-	886.00	953.00	1,097.00	15,109.00	13,971.00	15,947.00

(Source: Trademap)

4.4 Main supplying markets for agri products imported by South Africa

Value: in Thousand Dollars

Exporters	Imported value in 2019	Imported value in 2020	Imported value in 2021
World	3,003,734.00	2,817,134.00	3,033,901.00
Thailand	340,776.00	350,987.00	374,099.00
Brazil	228,949.00	212,820.00	274,677.00
India	168,640.00	221,738.00	194,051.00
Australia	25,488.00	26,049.00	174,329.00
China	145,761.00	126,363.00	146,608.00
USA	212,737.00	140,152.00	132,365.00
Spain	96,685.00	92,784.00	123,666.00
Lithuania	67,620.00	67,691.00	117,583.00
Namibia	119,196.00	81,194.00	115,898.00
Latvia	23,863.00	16,326.00	81,011.00
Poland	90,052.00	195,541.00	80,772.00
Argentina	175,318.00	71,065.00	76,822.00
New Zealand	45,193.00	53,561.00	64,343.00
Italy	61,872.00	56,659.00	62,409.00
Germany	197,270.00	118,896.00	60,753.00
France	55,813.00	56,360.00	60,371.00
Mozambique	47,627.00	48,317.00	60,177.00
Russian Federation	109,421.00	133,322.00	57,501.00
Netherlands	29,850.00	42,583.00	56,188.00
Canada	48,056.00	45,181.00	55,104.00
Eswatini	27,052.00	23,154.00	54,705.00
Belgium	39,146.00	46,292.00	46,774.00
United Kingdom	33,603.00	38,611.00	45,097.00
Viet Nam	38,536.00	31,892.00	37,783.00

(Source: Trademap)

4.5 Main export destinations for agri products exported by South Africa

Importers	Exported value in 2019	Exported value in 2020	Exported value in 2021
World	6,115,767.00	6,674,835.00	7,971,412.00
Netherlands	745,966.00	952,572.00	1,158,552.00
United Kingdom	554,815.00	589,203.00	678,776.00
Botswana	373,116.00	338,680.00	406,219.00
United States of America	263,046.00	255,051.00	380,880.00
China	322,806.00	328,500.00	363,772.00
United Arab Emirates	199,727.00	247,493.00	299,332.00
Namibia	287,794.00	243,812.00	293,881.00
Japan	77,213.00	103,319.00	285,747.00
Mozambique	263,248.00	264,056.00	274,625.00
Russian Federation	161,299.00	233,290.00	242,489.00
Spain	164,058.00	166,188.00	239,794.00
Eswatini	166,589.00	174,814.00	202,957.00
Italy	140,482.00	134,750.00	197,111.00
Hong Kong, China	222,886.00	198,990.00	196,893.00
Lesotho	157,461.00	143,862.00	183,443.00
Zimbabwe	62,607.00	224,332.00	156,907.00
Canada	119,352.00	152,280.00	153,843.00
Germany	157,757.00	138,869.00	153,781.00
Taipei, Chinese	26,745.00	85,558.00	136,043.00
Viet Nam	75,990.00	95,749.00	131,108.00
Malaysia	102,907.00	88,048.00	120,526.00
Saudi Arabia	122,821.00	111,145.00	118,506.00

4.6 Main agri products exported by South Africa

Code	Product label	Exported value in 2019	Exported value in 2020	Exported value in 2021
'TOTAL	All products	90,419,473.00	85,686,133.00	123,734,050.00
	Main Agri Commodities 4 HS	6,115,767.00	6,674,835.00	7,971,412.00
'0805	Citrus fruit, fresh or dried	1,368,348.00	1,707,181.00	1,840,989.00
'0806	Grapes, fresh or dried	639,870.00	644,969.00	828,890.00
'1005	Maize or corn	281,052.00	564,615.00	809,266.00
'0808	Apples, pears and quinces, fresh	557,057.00	599,496.00	689,623.00
'0802	Other nuts, fresh or dried, whether or not shelled or peeled (excluding coconuts, Brazil nuts ...	413,196.00	373,684.00	408,620.00
'2009	Fruit juices, incl. grape must, and vegetable juices, unfermented, not containing added spirit, ...	266,151.00	249,614.00	314,505.00
'0810	"Fresh strawberries, raspberries, blackberries, back, white or red currants, gooseberries and ...	167,263.00	190,695.00	232,570.00
'2008	Fruits, nuts and other edible parts of plants, prepared or preserved, whether or not containing ...	212,201.00	177,737.00	196,391.00
'0809	Apricots, cherries, peaches incl. nectarines, plums and sloes, fresh	104,447.00	101,089.00	173,577.00
'0804	Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens, fresh or dried	107,220.00	142,945.00	162,244.00
'0303	Frozen fish (excluding fish fillets and other fish meat of heading 0304)	139,187.00	141,879.00	148,135.00
'0304	Fish fillets and other fish meat, whether or not minced, fresh, chilled or frozen	144,665.00	123,190.00	144,729.00
'0307	Molluscs, fit for human consumption, even smoked, whether in shell or not, live, fresh, chilled, ...	114,209.00	93,398.00	135,411.00
'1901	Malt extract; food preparations of flour, groats, meal, starch or malt extract, not containing ...	88,242.00	88,936.00	104,448.00
'1001	Wheat and meslin	45,027.00	53,267.00	94,891.00
'0201	Meat of bovine animals, fresh or chilled	65,763.00	80,352.00	89,517.00
'1904	"Prepared foods obtained by the swelling or roasting of cereals or cereal products, e.g. corn ...	72,903.00	64,532.00	84,094.00
'1006	Rice	65,026.00	70,814.00	82,225.00
'1905	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion ...	82,086.00	76,233.00	81,237.00
'0207	Meat and edible offal of fowls of the species Gallus domesticus, ducks, geese, turkeys and ...	78,227.00	73,821.00	76,965.00
'0202	Meat of bovine animals, frozen	49,491.00	74,351.00	75,825.00
'0603	Cut flowers and flower buds of a kind suitable for bouquets or for ornamental purposes, fresh, ...	55,765.00	45,511.00	70,393.00
'0910	"Ginger, saffron, turmeric ""curcuma"", thyme, bay leaves, curry and other spices (excluding ...	60,924.00	57,170.00	67,447.00
'0401	Milk and cream, not concentrated nor containing added sugar or other sweetening matter	52,151.00	51,381.00	66,705.00
'0306	Crustaceans, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine, ...	59,331.00	49,690.00	65,880.00
'0402	Milk and cream, concentrated or containing added sugar or other sweetening matter	60,355.00	56,393.00	62,361.00
'2005	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, not frozen ...	57,204.00	47,607.00	56,329.00
'0701	Potatoes, fresh or chilled	45,770.00	42,770.00	51,370.00
'0406	Cheese and curd	39,050.00	37,955.00	49,634.00

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