

The Policy Landscape In 2025 And Priorities For 2026

Agbiz Media day
5 December 2025
Theo Boshoff



The year in review

Challenges and green shoots...

A new year, new hopes and new misinformation...

- Expropriation Act signed into law;
- Big drive to tackle the misinformation;
- Terbufos and other highly hazardous substances in the crossfire.



Farmworker testimonies push call for pesticide ban

The Portfolio Committee on Agriculture has renewed calls for action against harmful pesticides after alarming testimonies from farmworkers.

foodformzansi.co.za



Mening | Groot Landbou verraai boere met sy paai-beleid | Netwerk24

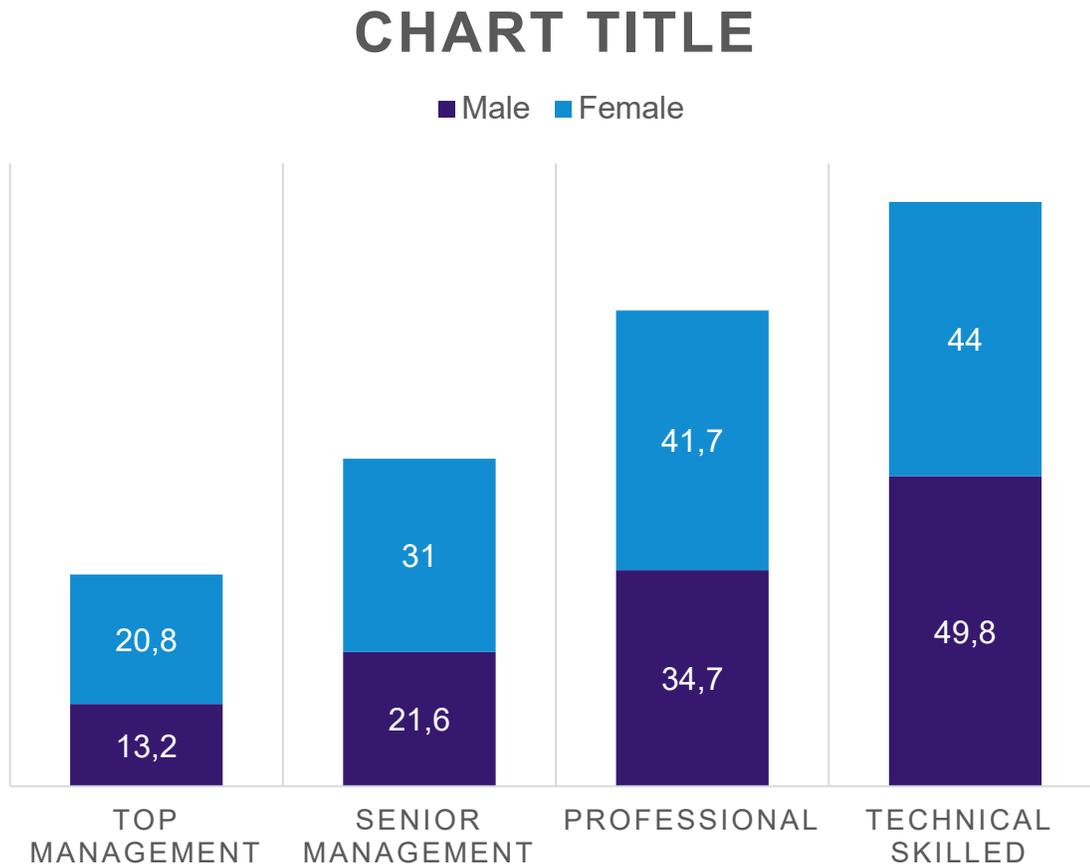
'n Sinistere rede skuil moontlik agter Groot Landbou se onverklaarbaar lamsakkige houding teenoor die Onteieningswet, skryf Hermann Pretorius.

netwerk24.com

Mening | Groot Landbou verraai boere met sy paai-beleid <https://www.netwerk24.com/netwerk24/stemme/menings/mening-groot-landbou-verraai-boere-met-sy-paai-beleid-20250524>

7:34 am

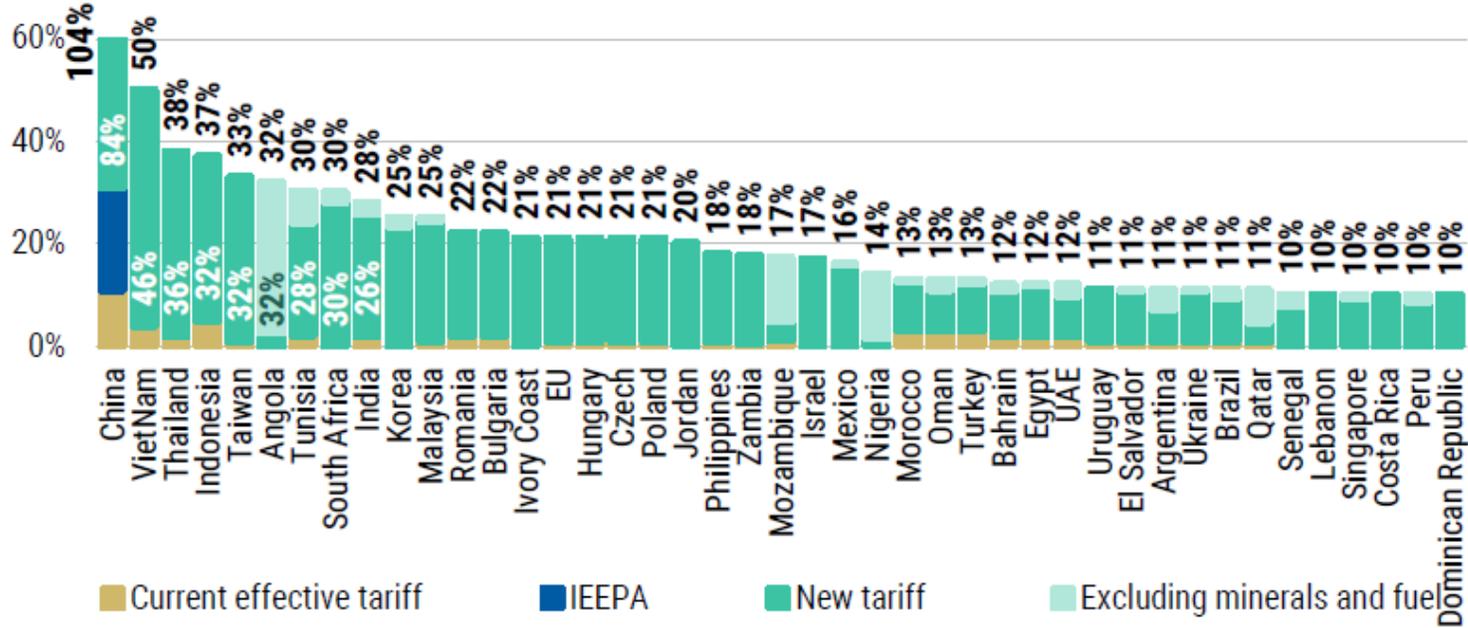
Employment equity targets



- Final EE targets announced;
- Not against targets in principle but lack of consultation = unattainable targets;
- Maximum fines of 10% turnover; but
- Grounds of justification key;
- BUSA challenge;
- DEIB working group

“liberation day” tariffs announced

Estimated US Tariff Level on Imports

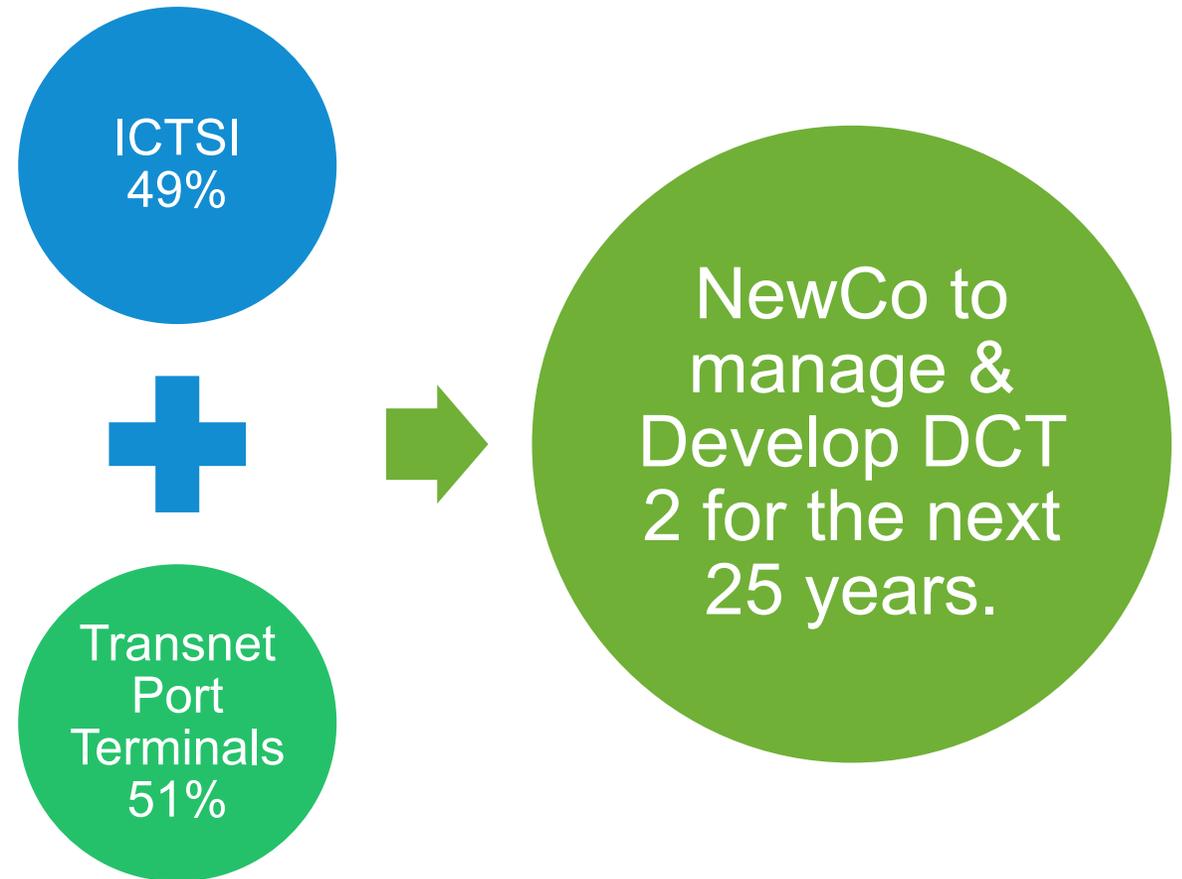


**Not doom and
gloom
- some real
green shoots!**



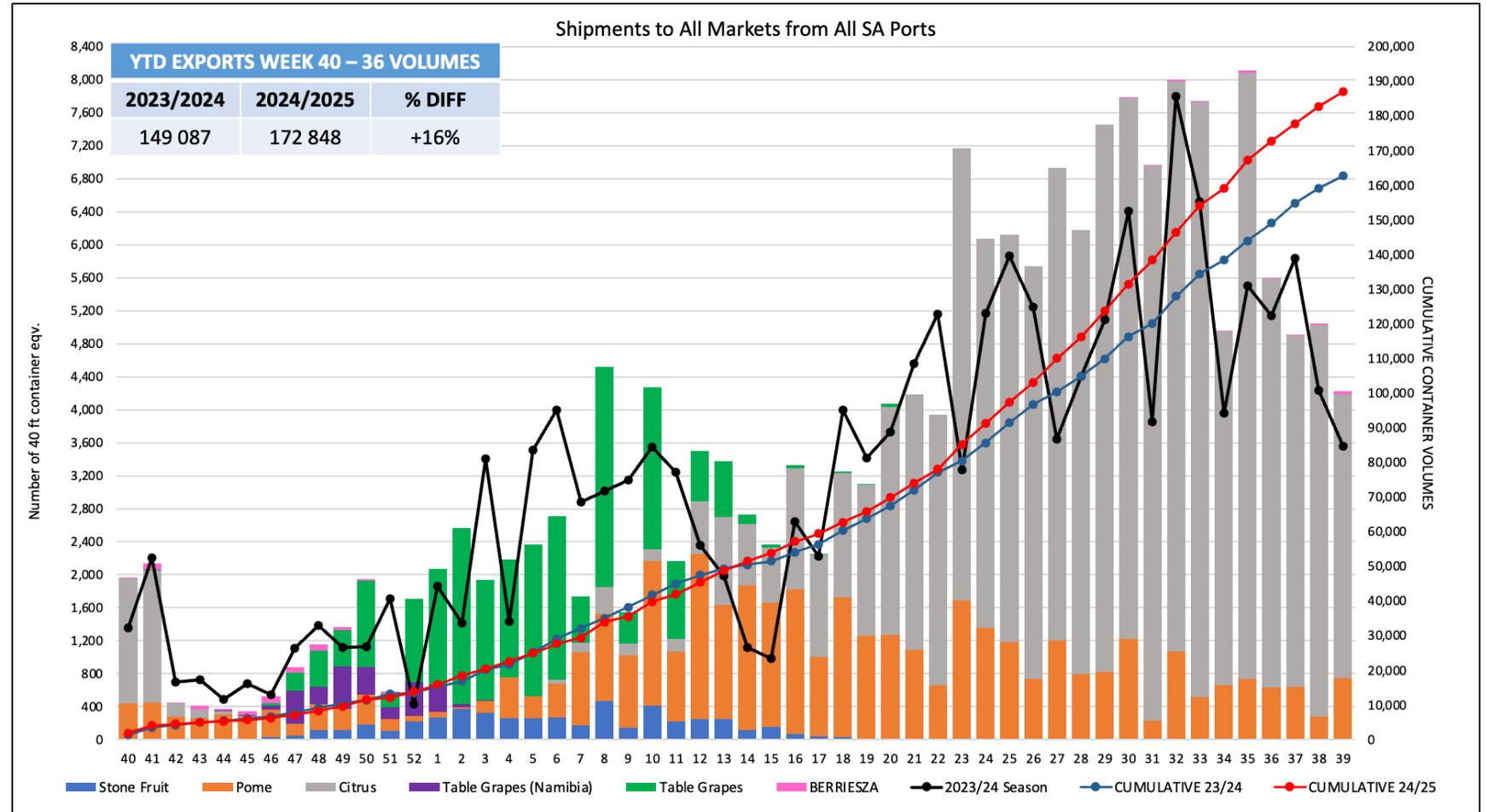
Durban PSP finally resolved

- Not privatisation – TPT sought a private sector partner to invest & help manage;
- 11 international companies applied;
- ICTSI awarded, AP Moller-Maersk aggrieved;
 - ICTSI did not meet the 0.4 solvency threshold in RFQ; but
 - Provided other evidence (market capitalisation) to prove its ability to invest in the port;
 - ICTSI had the best offer for 49% shareholding (R11,1B vs R9,2B);
- Interdict granted in 2024; but
- 10 October 2025 – review court held procedural irregularity ‘not material’;
- **Signing ceremony December & due to start in January 2026**



Cape Town

- No PSP but steady improvement;
- 9 used RTGs procured from LA last year;
- 18 new RTGs recently commissioned;
- Technicians trained by OEM;
- Pre-season planning with fruit industry in full swing;
- Cape Town named as 'most improved' port in 2024 World Bank CPPT index.



Genset 2024/25

Direct benefits

- 43% utilisation rate;
- 120 plug points over 90 days = 4 644 container/per day that would otherwise have to be sent back or rerouted to Eastern Cape;
- @R650 per day to rent private plug point capacity, it saved the industry R3 018 600 direct cost + extra transport costs.
- Genset project cost R1 400 000 but saved at least R3m for industry;

Genset project to be repeated 2025/26

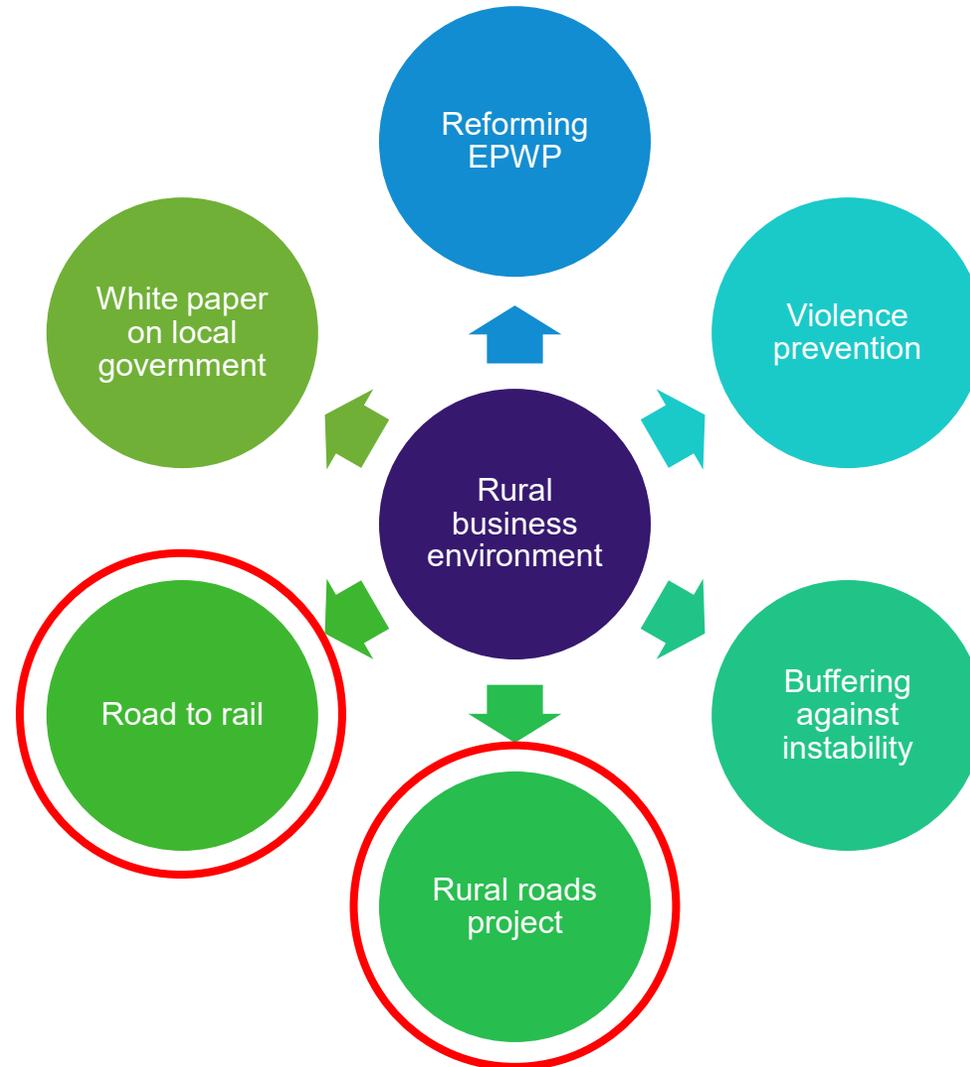
- FPEF, SATI, Hortgro, WC Gov, KAL, Santam onboard as funders;
- Hope to institutionalise it next year.



<https://youtu.be/QuvDht17gkl>

'Omnibus' of strategic projects

- Difficult issues to address as they relate mostly to local & provincial government;
- But vital for member;
- Blend of policy issues & practical solutions;
- Working with partners (Agri SA, ISS etc.) but implementation will be member-driven.



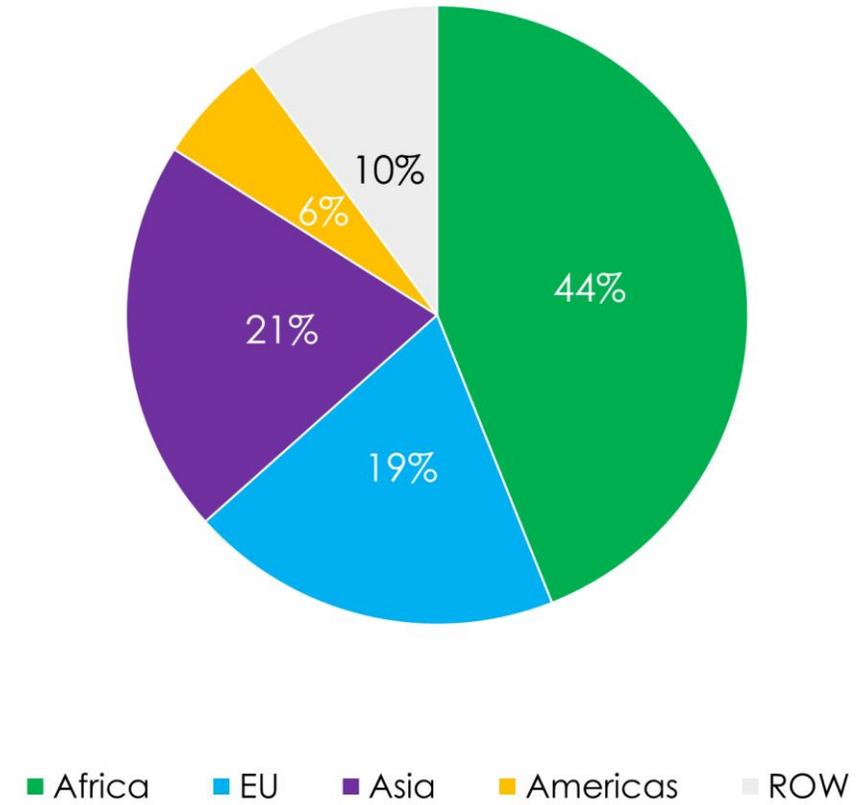
Proactive interventions on trade

Developments in the US;

Diversification;

BUSA process on trade priorities

SA's agriculture exports by region in 2024



Domestic moves within the US

US Supreme Court

- Legal challenge by US importers & manufacturers;
- In May, New York court ruled that the tariffs exceeded the 'national security' powers & US Congress has power to regulate trade, not executive;
- Upheld by appeals court in DC in August;
- Supreme Court hearing arguments in Nov;
- Judgement 2026?
- US \$223.9Bn already collected since August.

Discussions between US & SA ongoing but highly confidential!

14 November Executive Action

List of agricultural products exempted from tariffs as US consumers feel the pinch.

Important for SA (clarification pending);

- Several red meat tariff lines;
- Oranges & limes (soft citrus varieties unclear);
- Macadamias;
- Orange Juice;
- Subtropical fruits (fresh & tinned – lots of tariff line detail tbc).

Key products not exempted – table grapes, stone fruit, raisins, wine, ostrich leather.

No public consultation process but we are writing to USTR & IFPA in the US.

	Potential markets			Threats or low potential
	Low hanging fruit	potential	High potential but complex	
Agriculture	UAE, Saudi Arabia, Japan, S Korea	Vietnam, Thailand, Philippines, Malaysia, Indonesia	China India	Brazil & other Mercosur countries
Sugar	N/A, focus on local market & biofuels			Brazil
Automotives & components	AfCFTA, Gulf markets, US, Mercosur			China
Minerals	Japan, EU, AfCFTA			
Aluminium	S Korea, EU, AfCFTA			Canada
Retail, clothing & textiles	SACU, SADC, US, East Africa			China, India , Bangladesh
Chemicals	Japan, Gulf Cooperation Area, ASEAN			China & India
Consumer goods	EU, China, Saudi Arabia & UAE, AfCFTA			Not markets but regulatory harmonisation key for China, EU & gulf

Why are we rejecting advances by Japan, S Korea & ASEAN countries & pursuing India, China & Brazil?!

Recommendations to Min Tau

1. Prioritise Quick Wins

Focus negotiations on Gulf and East Asian markets (UAE, Saudi Arabia, Japan, South Korea), where export potential is high and domestic resistance is limited.

2. Strengthen Institutional Capacity

ITAC, SARS, trade negotiators & DTIC trade desks.

3. Harmonise Master Plans

Need coherence in trade policy (export strategy vs defensive priorities)

4. Address Non-Tariff Barriers

SPS compliance systems, traceability (GS1), and standards alignment

5. Re-evaluate Engagement with the United States

viable to invest resources in negotiations that may yield minimal benefit?

Recommendations to Min Tau

6. Align Trade Policy with Industrial Master Plans

7. Streamline Trade Administration and ITAC Processes

8. Expand South Africa's Diplomatic and Trade Representation

Capacitate embassies with trade staff & link up with private sector trade efforts, attaches, & funding of trade show representation

9. Enhance Data Sharing and Private Sector Intelligence

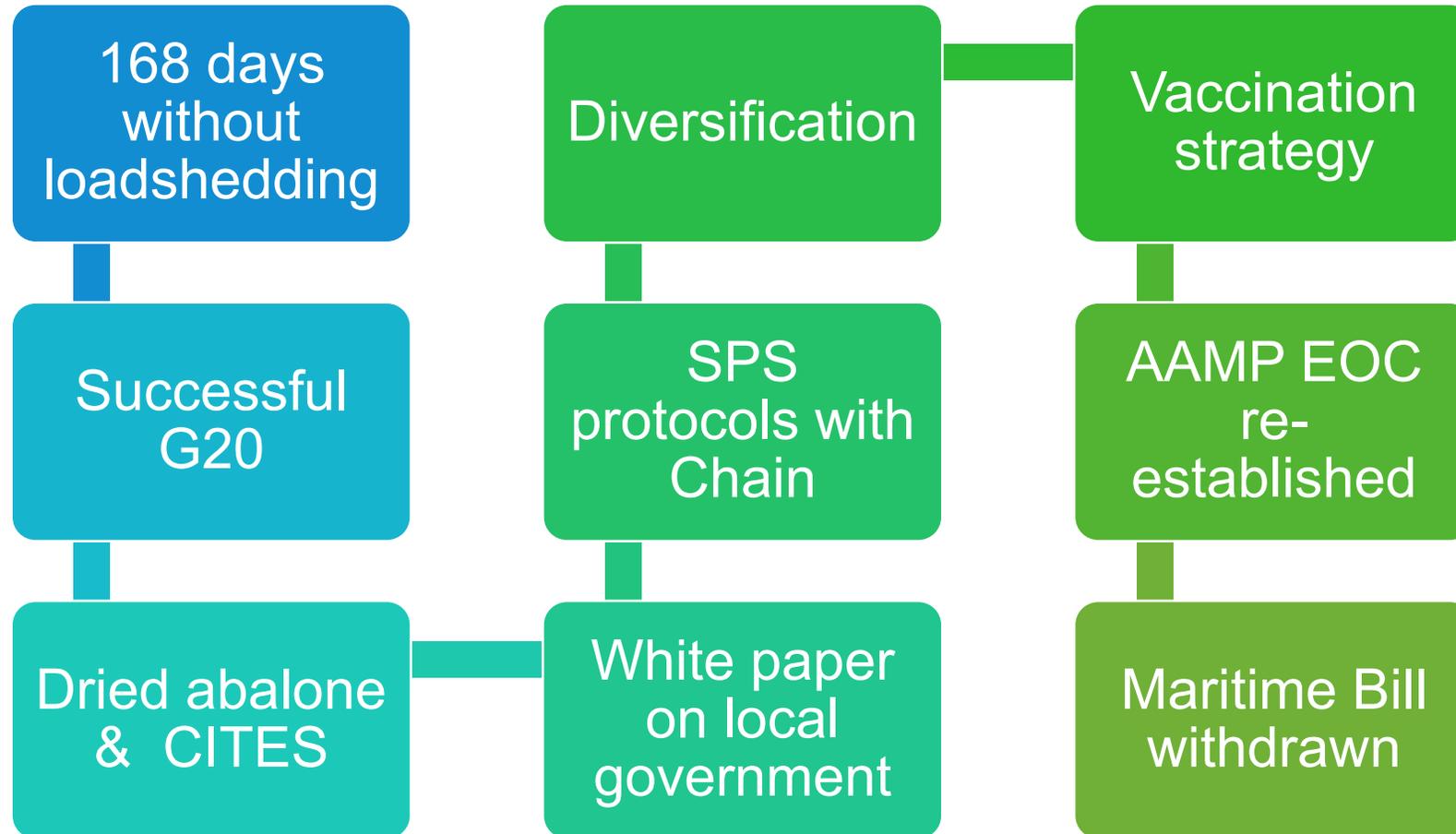
10. Support Private Sector-Led Value Addition and Industrialisation

11. Reinforce Institutional Coordination Between the dtic and DIRCO

12. Rebalance trade diplomacy to focus on value-driven markets rather than politically driven relationships.

13. FTAs not viable for India/China? – Partial Scope Trade agreements could be a viable alternative!

Other positive signs



Key points to watch in 2026



Thank you!

Building C, 1st Floor, 477 Witherite Road, The Willows, Pretoria, South-Africa, 0184

PO Box 76297, Lynnwood Ridge, South Africa, 0040

Tel. +27 12 807 6686 | Fax. +27 12 807 5600

admin@agbiz.co.za | www.agbiz.co.za

Vat nr. 4920204684

