

# A Time of Choices - Developments in South Africa's Trade Landscape

Agbiz Media Day  
05 December 2025  
Wolfe Braude



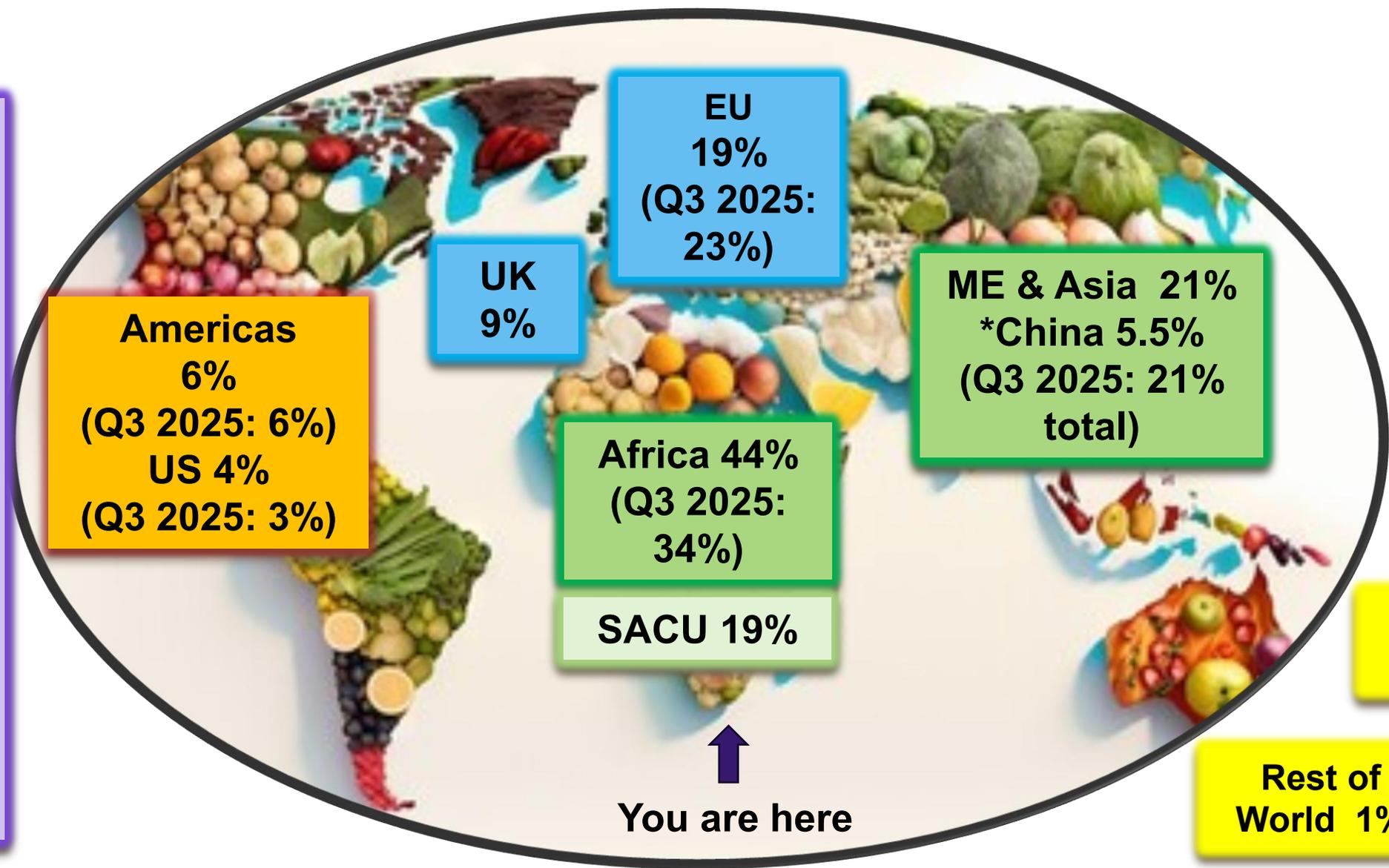
# What is the Agbiz Fruit Desk?

- Dedicated policy resource embedded in Agbiz, supports fruit sector and Agbiz capacity. Membership made up of the members of FruitSA.
- Funded by FruitSA members. Desk SteerCo comprised of FSA members
- A channel for articulating and actioning the policy needs of the SA fruit industry, within the broader agricultural policy landscape, and within work undertaken by Agbiz;
- A channel for communicating agricultural policy issues to the fruit sector, for consideration and mandate
- Core actions: policy & advocacy; developing a trade enabling environment

# SOUTH AFRICA'S DIVERSIFIED TRADE EXPOSURE – 2024 TOTAL & Q3 2025

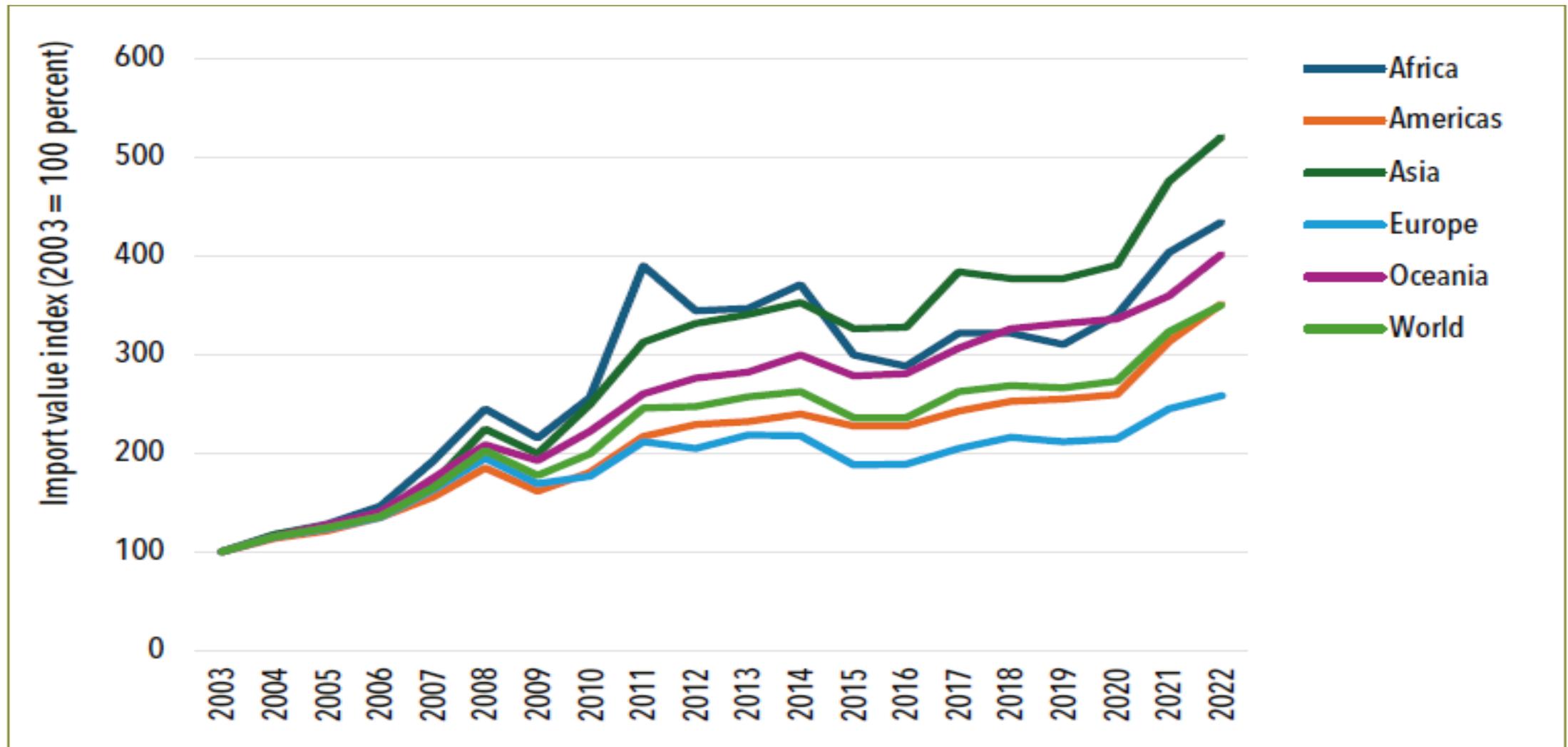
**FRUIT EXPORTS 2024**

- EU 36%
- Asia 17%
- Middle East 15%
- UK 13%
- N America 7%
- Africa 5%



(In the 3<sup>rd</sup> quarter of 2025: SA agri trade surplus of US\$2.7 billion, up by 28% YoY from the same period in 2024)

# Trends in agricultural import value by region, 2002-2022 (IFPRI 2024)



# Fruit shipments – to all markets 2022/23 – 2024/25

40 foot container equivalents of cartons packed, all shipping modes,

<b>2022/23 Season</b>	<b>160 528</b>
<b>2023/24 Season</b>	<b>162 720</b>
<b>2024/25 Season</b>	<b>189 638</b>
20245/26 Season – YTD export volumes up. Unusually heavy winds in Nov delayed grape and deciduous exports.	



## Export estimates 2025/26 vs 2024/25:

Grapes +1%, Nectarines +18%, Plums +3%, Peaches +3%, Peaches +3%, Apricots -3%, citrus +22% (season over), avos +15%, mangoes +25%, litchis +250%, and blueberries +30% predicted.

# Comparative Export Values - 2024

- **Total SA agri exports 2024 (\$13.7bln) were:**
  - nearly 2 x iron ore export value,
  - Nearly 3 x chromium ore, 2.6 x ferrochrome export value
  - 2.7 x SA's iron & steel exports value
  - 1.7 x SA's machinery (HS84 & HS85) exports value
  - Slightly larger than autos & auto components export value
- Fruit sector exports alone = close to SA's ferrochrome exports, larger than manganese exports.



# A time of change

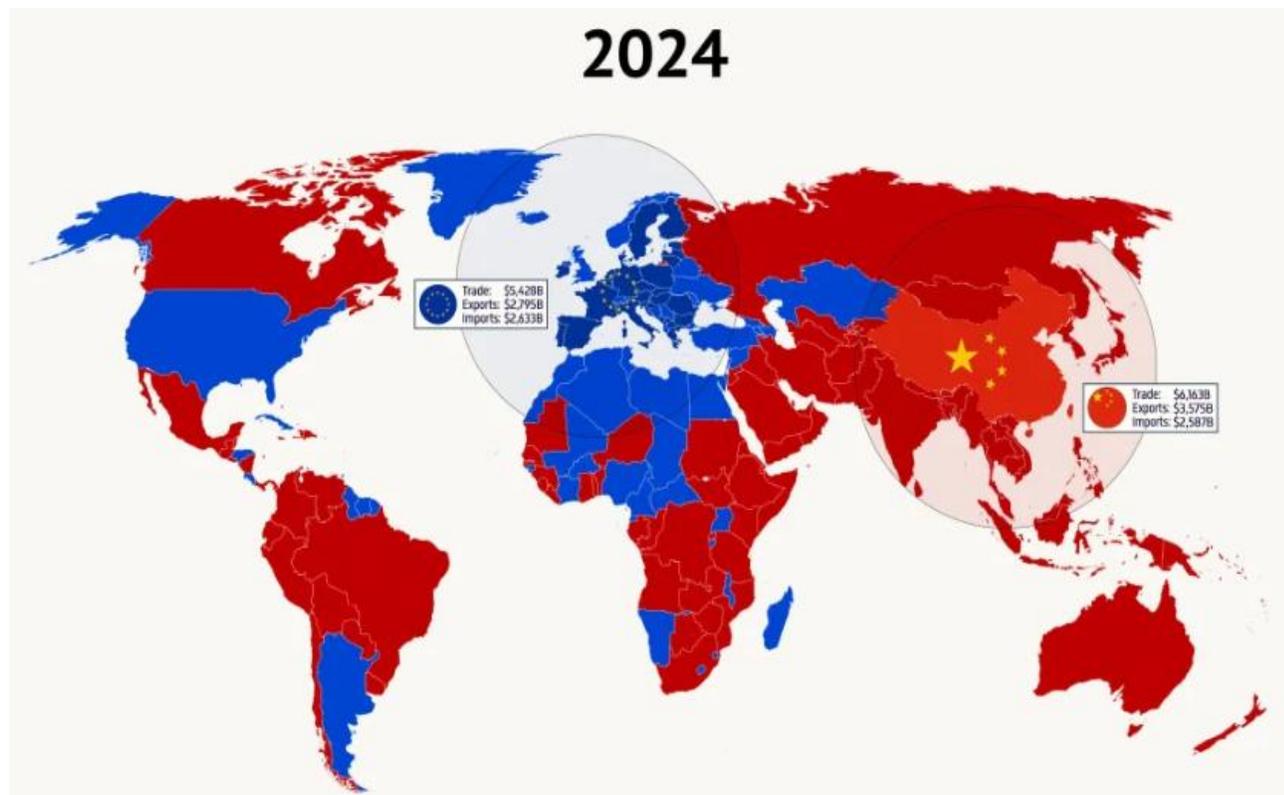
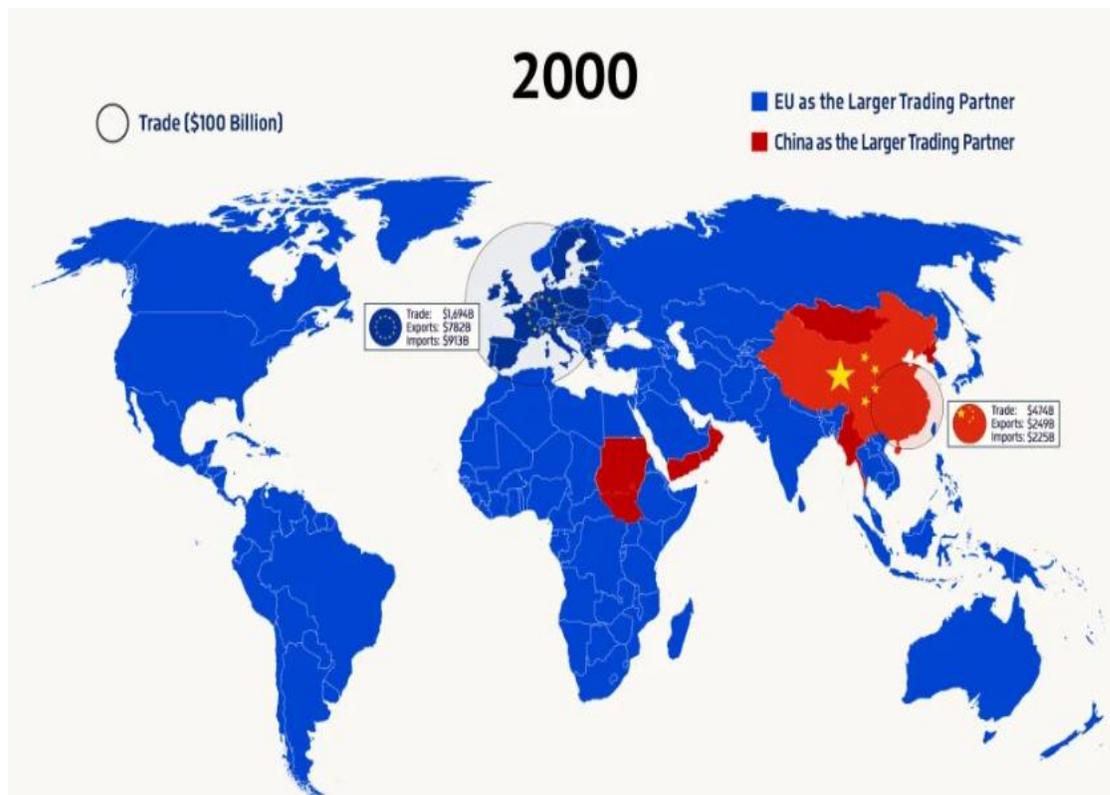


# China vs US as largest trade partner for global markets, 2000 vs 2024



China is now the dominant trade partner for most of Asia, Eastern Europe, the Middle East, Oceania, South America, and Africa, with a total of US\$6.2tn worth of trade vs US's S\$5.3tn

# EU vs China as largest trade partner for global markets, 2000 vs 2024



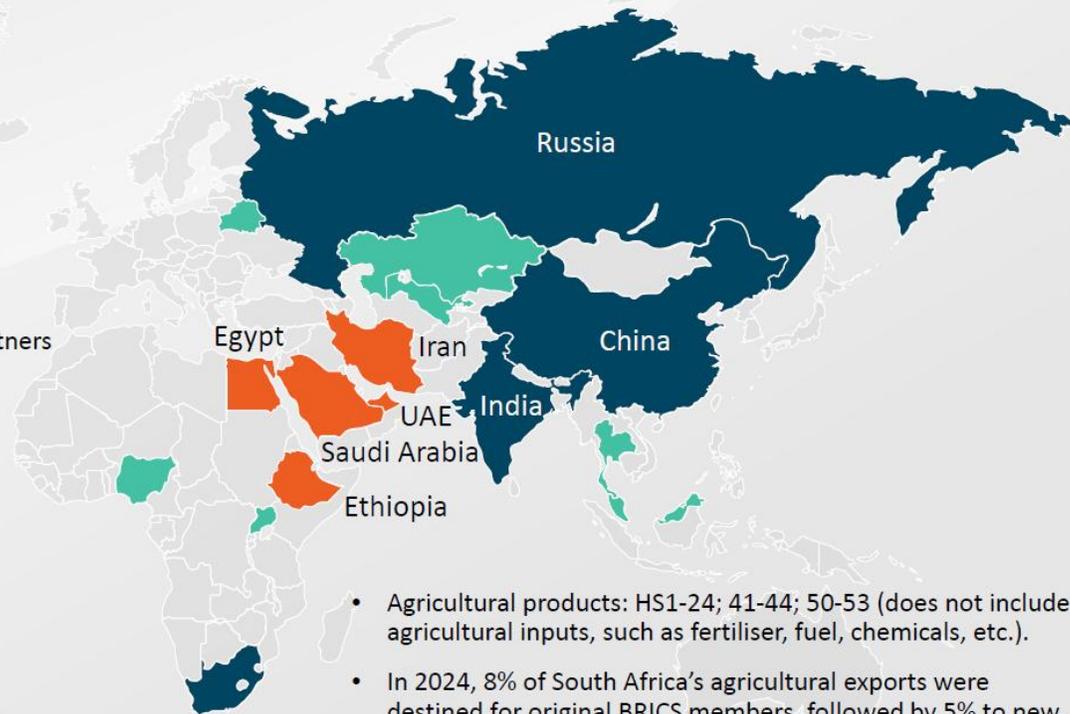
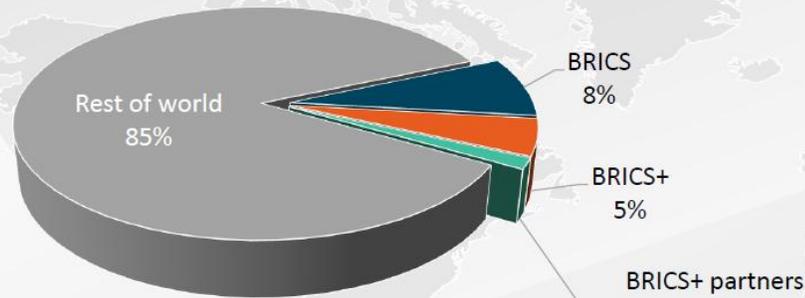
From 2000 to 2024, EU total goods trade (exports + imports) grew from \$1.69 trillion to \$5.43 trillion (4.1% CAGR) and from \$4.74 billion to \$6.16 trillion for China (11.3% CAGR).

# SA trade with BRICS grouping

## BRICS+ members, new members and partner countries and their importance as an export destination for SA



South Africa agricultural exports: R275 bn in 2024



- Original BRICS members
- New BRICS members
- BRICS partner countries

- Agricultural products: HS1-24; 41-44; 50-53 (does not include agricultural inputs, such as fertiliser, fuel, chemicals, etc.).
- In 2024, 8% of South Africa's agricultural exports were destined for original BRICS members, followed by 5% to new BRICS members (BRICS+) and 2% to BRICS partner countries (BRICS+ partners).
- 85% of agricultural exports were destined for other countries.

Sources: ITC (2025); MacMap (2025)

**BRICS founders:**  
8%

**BRICS+:** 3%

**BRICS+ partners:** 2%  
= 13% share of SA trade

**BRICS+**  
Egypt, Ethiopia,  
UAE, Iran,  
Indonesia

**Partners**  
Belarus, Bolivia,  
Kazakhstan, Cuba,  
Malaysia, Thailand,  
Uganda, Uzbekistan

A time of choices



# Emerging diversification: US / China / India / AfCFTA / BRICS+ / New partners

## Unilateral trade liberalization and attendant deflection

- America First / MAGA doctrine: most profound re-ordering of global trade since creation of WTO. But **unilateral**, not plurilateral or multilateral.
- **US pursuing both unilateral market access and tariff revenue.**
- America First trade deals generating trade deflection – i.e. waves of ex-US exports in search of new markets.
- Significant damage to standing of WTO rules/commitments and efforts to reform WTO.

## SA's Trade Strategy - under revision

- Recalibration of SA trade policy, driven by growing global protectionism in traditional markets. Via NEDLAC. Agbiz on trade committee.
- New strategy emphasises **diversification**. BUSA has encouraged this previously.



### The MFN lose-lose landmine?

- US deals aren't yet FTAs or PTAs.
- Tariff reductions may be MFN reductions?
- All WTO will then benefit.
- US loses the value
- Trade partner now vulnerable to all its best competitors

# SA's push for diversification



## DTIC push for diversification

1. **Revisit existing agreements**
  - EFTA, MERCOSUR, UK-EPA, EU EPA
  - Relook at Quotas for EU & UK EPAs
2. Push **agreements with new partners**:
  - India, China, S Korea? Singapore? UAE? GSP access for wine to Japan?
3. Trade missions 2025:
  - Japan, Saudi Arabia, India, Switzerland, Indonesia, Vietnam, Malaysia, Turkey
4. **Finalise AfCFTA** negotiations, accelerate implementation. **Agbiz to sit on NIC.**
5. **Proposed by Agbiz & wider business: resource state 'trade machinery'**. Negotiations, trade promotion, trade facilitation, embassies, plant and animal health protocols, tariff administration.
6. Use **G20** to build trade relationships

- **Significant potential export opportunities:**
    - **China** – SA supplies only 0,5% of agri import market of over \$200bln
    - **Saudi Arabia** - SA supplies less than 1% of agri import market of \$30bln
    - **UAE** - SA supplies 2% of agri import market of \$23bln
    - **Vietnam** - SA supplies less than 0.3% of agri import market of \$32bln
    - **37% or \$5,2bln of SA's agri exports are currently non-FTA/PTA.**
- = under 1% of total ME/Asia agri imports**

# Agbiz trade diversification policy initiatives

## Agri Value Chain Preferential Trade Agreements concept

- **Agbiz Fruit** proposed: Agricultural sector Value Chain specific, partial trade agreements with trading partners as an alternative pathway for relevant markets (Partial Sectoral Agreements);
- Avoids deadlocks and risks for textiles, manufacturing and other sensitive sectors
- **Dtic confirmed in mid-2025 that it now supports concept of sectoral trade agreements as proposed by Agbiz**
- Model impacts of an agricultural value chain PTA on high tariff markets such as China, India, Vietnam, Thailand
- **STATUS: RFQs completed, evaluation underway, conclude mid-2026**
- Target markets for SA fruit: **China, South Korea, Japan, Thailand, USA, Vietnam, Taiwan, India, Philippines, Indonesia, Bangladesh, UAE, Saudi Arabia.**



# Agbiz consideration of South Africa's Trade Strategy: Country-Level Assessments and Masterplan Insights, 2025

**Trade strategy:** deepen agricultural ties with Asia & Middle East

**Priority markets:** UAE, Saudi Arabia, Japan, South Korea

**Cautious liberalisation:** China, India, Vietnam

ASEAN (Philippines, Malaysia, Thailand, Indonesia): diversification

Align trade with 11 sectoral masterplans to balance opportunities & sensitivities

# Why is SA pushing for trade agreements?



# Can SPS applications alone suffice? Can't we just use SPS Protocols?



Commodity	BRICS markets	SPS timeline
Avocados	SA to India	Process commenced in 2013. First response on quarantine pest list in 2018. <b>10 years &amp; counting.</b>
Pears & Stonefruit	SA to China	Process for pears & stonefruit commenced in 2003. Pears finalised 2022. <b>19 years. Stonefruit protocol finalised 2025.</b>
Apples	SA to China	Process commenced around 2001. Finalised 2016. <b>15 Years.</b>
<p><b>Limitations:</b> Single commodity. Queuing system. SPS Agreements are vulnerable to unilateral action. No legal framework or dispute resolution mechanisms.</p>		

# Why the push for trade agreements?

Asian market/SHAFTE country	South Africa	Australia	New Zealand	Peru	Chile	Argentina	Uruguay
China			Bilateral agreement	Bilateral agreement	Bilateral agreement		
India				GSTP	Bilateral agreement GSTP	GSTP Mercosur - India bilateral	Mercosur - India bilateral
Indonesia		ASEAN - Australia - New Zealand	ASEAN - Australia - New Zealand	GSTP	GSTP	GSTP	
Japan				Bilateral agreement	Bilateral agreement		
South Korea				Bilateral agreement GSTP PTN	Bilateral agreement GSTP PTN	GSTP	PTN
Malaysia		Bilateral agreement ASEAN - Australia - New Zealand	Bilateral agreement ASEAN - Australia - New Zealand	GSTP	Bilateral agreement GSTP	GSTP	
Philippines		ASEAN - Australia - New Zealand	ASEAN - Australia - New Zealand	GSTP PTN	GSTP PTN	GSTP	PTN
Thailand		ASEAN - Australia - New Zealand Bilateral agreement	Bilateral agreement ASEAN - Australia - New Zealand	GSTP	GSTP	GSTP	
Vietnam		ASEAN - Australia - New Zealand	ASEAN - Australia - New Zealand	GSTP	<b>GSTP</b>	<b>GSTP</b>	



# Why trade agreements? Lack of agreements & prevalence of high tariffs...

	China	India	Russia
<b>Apples</b>	10%	50%	5%
<b>Avocado/Apricot</b>	25%	30%	4%
<b>Grapefruit</b>	12%/11%	25%/30%	4%
<b>Grapes</b>	40%/13%	20%/30%	0%
<b>Lemons/Pears</b>	11%/12%	30%/25%	4%
<b>Litchi</b>	21%	24%	3%
<b>Nectarine/Peach</b>	10%	30%	0%
<b>Mango</b>	15%	30%	3%
<b>Orange</b>	11%	30%	0%
<b>Plum</b>	10%	25%	4%
<b>Soft Citrus</b>	12%	30%	3%

# Status of SA's trade negotiations



# South Africa – China Framework Agreement

- Partnership Agreement proposed by China
- China is keen to reach agreement as soon as possible.
- Agbiz has requested sectoral / partial trade agreement option for agriculture
- Parties are in consultation.

## Key issues

- Provides unilateral, tariff-free access now; but will future access for China? May have obligation to negotiate towards a Free Trade Deal?
- Risk to SA's manufacturing, autos, clothing/textiles
- Risk of customs circumvention.

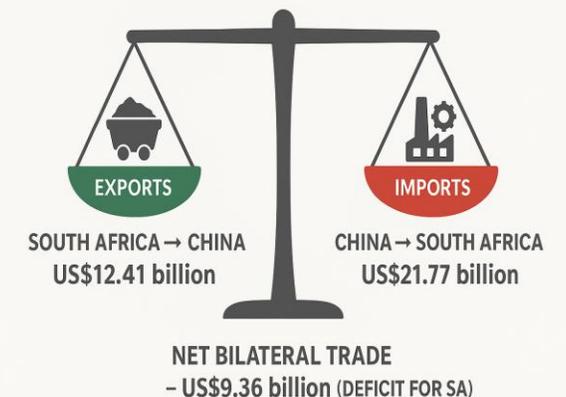
## China says it will remove all tariffs on African exports to boost trade

By Duncan Miriri

June 12, 2025 5:17 PM GMT+2 · Updated June 12, 2025



### SOUTH AFRICA – CHINA BILATERAL TRADE 2024 (USD)



# South Africa – India PTA

- Revival & reset of PTA negotiations that started 2008
- 95% of trade between SACU and India is between South Africa and India
- Draft ToR for negotiations being negotiated. Precursor to possible actual negotiations.
- India wants comprehensive access, i.e. a full PTA.
- Agri sector believes an agri sectoral PTA is possible and may be a compromise and starting point.
- Risk of customs circumvention by Indian exporters.



# AGOA renewal & SA's continued eligibility

## Good news

- AGOA Bill introduced in Senate just before shutdown
- Calls for re-examination of AGOA with emphasis on bilateral deals
- **No upfront exclusion of South Africa** from “AGOA beneficiary countries” in the wording of the AGOA specific sections of the Bill.
- AGOA still holds value for SA. Reduces overall tariff total.
- May be finalised in early 2026



## Not so good news

- 2<sup>nd</sup> half of Bill calls for a review of SA as an actor that allegedly undermines the national security and foreign interests of the US.
- 4<sup>th</sup> attempt in 2025 to subject SA to a review via Congress.

# SA Agri & the G20 / B20

## Opportunity used to build trade & agri partnership relationships

- SA-EU Summit - 20 November - critical trading partner
- SA-Australia bilateral: biosecurity, climate-smart agricultural practices
- MoU on agricultural collaboration with Vietnam: production, plant protection, animal husbandry, veterinary services, research, development, technology transfer

## Focus

- **Reframing of African agriculture** - commercial production while significantly supporting smallholder farmers
- Holistically modernising African and global agriculture

## G20 Leader's Declaration

- “commitment to ensuring resilient and sustainable food systems and food security through open and non-discriminatory trade policies consistent with WTO rules.”
- soil biodiversity, energy and water management, reducing food waste, climate adaptation and mitigation, accessible finance



And to close, what SA needs to encourage  
& what a SA-US-China future should really  
mean...



# Trade works best over a braai!



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