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**South Africa's agricultural trading relationship with  
Botswana, Lesotho, Namibia and Swaziland (BLNS)**

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# Background

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- **The objective of this paper is to analyse the SACU agricultural trading relationship with particular focus on South Africa's dominant trading position vis-à-vis the rest of SACU .**
- **Data for the first section was sourced from the International Trade Centre (ITC), for the second section from both ITC and SACU Secretariat. All data is in rand (millions) and relative market shares.**

# RSA Exports to SACU

- **South Africa's aggregate exports to the SACU increased from R80.6 billion in 2010 to R131.3 billion in 2014**
- **Agr exports R15.1 bill 2010 to R21.9 bill 2014**
- **(agr 18.7% in 2010 to 16.7% in 2014 as % total)**
- **Maize, sugar, wheat, cigarettes and juices main exports, with maize, sugar and wheat 6.5%, 5.3% and 4.4% respectively in 2014 agr exports to SACU.**

# Imports from SACU

- Aggregate imports from SACU increased from R18.3 billion in 2010 to R29.6 billion in 2014
- South Africa's top three imports from SACU were odoriferous mixtures, diamonds and chemical industry products, totalling R3.5 billion, R2.4 billion and R2.0 billion respectively in 2014.
- 61.5% growth over the period.

# Imports Agriculture

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- **Within the top 25 there were the agr products of sugar, beer, beef, sugar confectionery, live cattle, and sheep and goat meat.**
- **Total agr imports from SACU increased from R5.1 billion in 2010 to R6.5 billion in 2014 (28% growth over the period.)**
- **But decreased as a share of South Africa's total imports from SACU, from 27.7% in 2010 to 21.8% in 2014.**

# Agr balance

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- **Agr exports to SACU - R15.1 bill 2010 to R21.9 bill 2014**
- **Agr imports from SACU increased from R5.1 billion in 2010 to R6.5 billion in 2014**
- **Balance in South Africa's favour =**  
**Implications for Revenue shares (RSA gains but loses)**

# Agr exports 2014 R million

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- **To SACU -- 21.8**
- **To Botswana -- 6,694**
- **To Namibia -- 7,993**
- **To Swaziland-- 2,888**
- **To Lesotho – 3,983**

# Agr imports 2014 R million

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- **SACU -- 6,465**
- **From Botswana – 662 m**
- **From Namibia – 2,397**
- **From Swaziland – 2,897**
- **From Lesotho – 433 m**

# Imports from Botswana

- **During 2014 South Africa imported goods worth R5,061 million from Botswana, and some R662 millions of these imports were agricultural products.**
- **6% of Botswana's total exports and 34% of the agricultural exports, but only 0.5% and 0.6% of the total and agricultural South African imports respectively.**
- **main products were frozen beef, sugar confectionery, hides and skins, and fresh beef. The beef, hides and skins, and sugar confectionery imports all made a significant contribution to the total South African imports and, conversely, most of the exports to South Africa represented a significant % of the exports from Botswana in those lines.**

# To Botswana

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- **South African main agricultural exports to Botswana during 2014 were maize, sugar and wheat. The share of both total products (5%) and agricultural products from South Africa (7.8% - 6%) that were destined for Botswana was important for both countries in recent years.**

# Lesotho

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- **Wheat flour, wool and bran were the main agricultural imports from Lesotho during 2014.**
- **That South Africa is the major market for Lesotho's agricultural products is evident by several lines with a 100% trade share in that country.**
- **The main RSA exports were poultry, wheat, and maize, and for the top two Lesotho was a major market for South Africa.**

# Namibia

- **The main South African agricultural imports from Namibia by value were beer, live cattle and sheep meat (all braai related).**
- **South Africa's overall market share in Namibia was consistently above 55%, albeit with declines in 2012 and 2013, while its market share in Namibia's agricultural imports was higher. During 2014 it rose again to 85.7%.**
- **Namibia is also a significant and stable market for South African agricultural exports, with 8.6% in 2010 the highest share and the lowest of 7.5% in 2014.**

# From Swaziland

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- **Sugar is the top South African import from Swaziland, with a 66.3% share in the South African market during 2014.**
- **The overall importance of Swaziland as a source of total imports was low (around 1.1%), but the agricultural product share was somewhat higher at around 4%.**
- **Most of South African imports from Swaziland are sugar and sugar related (including preserved fruits containing sugars).**

# To Swaziland

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- **Maize is the main product exported by South Africa to Swaziland, but the share destined for Swaziland was low and fluctuated over the period, declining in recent years: from 9.6% in 2010 to 3.6% in 2014.**
- **Swaziland minor share of South Africa's total exports to the world, with export shares of 2.1% in 2010 and 1.7% in 2014.**
- **South Africa's exports do account for a large market share in Swaziland, with most of Swaziland's global agricultural imports come from South Africa.**

# Intra-BLNS

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- **Intra-BLNS agricultural trade is extremely limited. Namibia exports some beer to both Botswana and Lesotho and imports some beef from Botswana. Lesotho has virtually zero exports to the other BLNS partners but imports cotton from Botswana. Botswana imports various products in minor amounts from Namibia, while Swaziland is not actively involved with the BLNS partners.**

- Paper is on tralac website