



**agriculture,  
forestry & fisheries**

Department:  
Agriculture, Forestry and Fisheries  
**REPUBLIC OF SOUTH AFRICA**



**National Agricultural  
Marketing Council**  
Promoting market access for South African agriculture

# Markets and Economic Research Centre and Directorate of International Trade



# TRADEPROBE

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This issue of *TradeProbe* covers the following topics:

- **Market Profile: Fishery**
- **Product Profile: Sunflower**
- **Product Profile: Tomatoes**
- **A review of Intra-Africa Trade for Agriculture Forestry and Fishery products**
- **South Africa's Agricultural Market and Product Diversification**

## 1. MARKET PROFILE: FISHERY (HS 03 1604 & 1603)

The fisheries sector is divided into two subsectors in South Africa namely capture fishery and aquaculture. The fisheries presented in this article are the traded fish produced from both subsectors. Fish is one of the most traded food in the world (FAO, 2014). It is one of the sources of proteins and other nutrition such as Omega 3, minerals and vitamins. Apart from source of health benefits, fisheries sector contribute largely towards economic growth through job creation and exports earnings.

### Global Trade

**Table 1** indicates the world main exporters of fisheries products. China is the world leading exporter of fisheries products accounting for more than 15% of world market share in 2013. Noteworthy is that the China's exports growth rate is 120% from 2009 to 2013. The following leading exporters are Norway, Thailand, USA and Viet Nam accounting for a share of 7.8%, 5.4%, 4.4% and 4.3% respectively in 2013. South Africa's exports growth rate of fisheries was 41% in 2013 which is lower as compared to the world with a growth rate of above 72%. This indicates that the world trade of fish and fishery products is growing at a fast rate.

**Table 1:** World leading exporters of Fisheries

Rank	Exporter	Values in Rand (billions)		Share (%)	Growth %
		2009	2013		
<b>World</b>		<b>733.63</b>	<b>1243.8</b>	<b>100</b>	<b>72</b>
1	China	84.96	186.81	15.02	120
2	Norway	57.33	97.81	7.86	71
3	Thailand	51.39	66.63	5.36	30
4	USA	33.34	54.26	4.36	82
5	Viet Nam	35.22	53.17	4.27	63
6	India	13.35	45.43	3.65	240
7	Chile	24.73	42.7	3.43	73
8	Canada	26.62	41.59	3.34	55
9	Indonesia	18.66	36.93	2.97	98
10	Spain	25.8	36.53	2.94	42
<b>41</b>	<b>SA</b>	<b>3.53</b>	<b>4.98</b>	<b>0.4</b>	<b>41</b>

Source: Trade map, 2015

**Table 2** shows the world ten leading importers of fisheries products and their market share in 2013. The USA, Japan,

France and Spain have accounted for 15%, 14%, 6% and 6% respectively. The USA had increased its imports by R66 billion from 2009 to 2013, followed by Japan and China with R36 and R29 billion respectively. This reflects that demand of these fish products in these countries had increased. SA's ranking was at 33<sup>th</sup> place in the world imports in 2013.

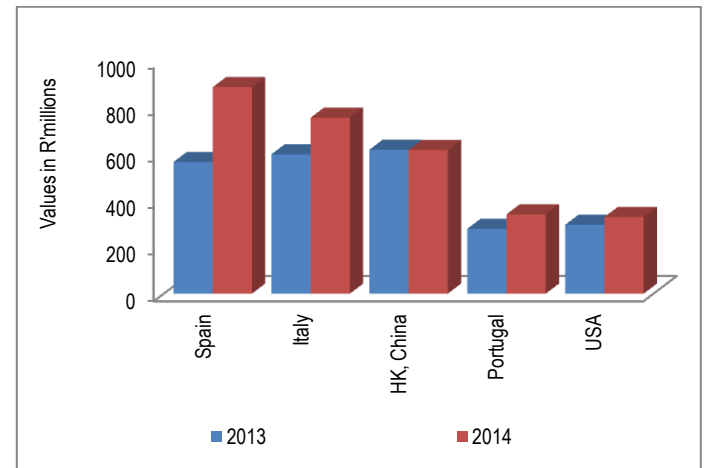
**Table 2:** List of importers of Fisheries

Rank	Importers	Value in R' Billion		Share %
		2009	2013	
<b>World</b>		<b>770</b>	<b>1235</b>	<b>100</b>
1	USA	114	180	15
2	Japan	108	144	14
3	France	46	62	6
4	Spain	49	61	6
5	China	30	59	4
6	Italy	42	54	5
7	Germany	35	52	5
8	HK, China	21	43	3
9	Sweden	21	43	3
10	UK	21	41	3
<b>33</b>	<b>SA</b>	<b>2</b>	<b>5</b>	<b>0.4</b>

Source: Trade map, 2015

### South Africa's trade performance of fisheries

**Figure 1** shows the top 5 South African exports markets between 2013 and 2014. This figure indicates that South Africa had increased its exports for these markets except Hong Kong, for the period of 2013 to 2014. HK, China was the top export market in 2013 followed by Italy then Spain. The exports to Italy increased by 26.3% and maintained its second position in 2014 comparison to 2013 export values. South Africa had increased its exports to Spain by 56.8% from 2013 to 2014, which made Spain a top destination market for fisheries products.

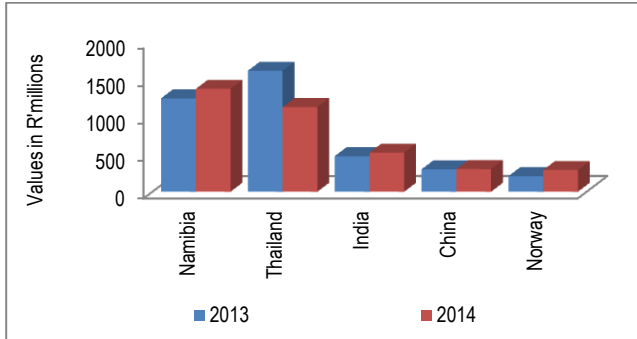


**Figure 1:** Main destination of South Africa's fisheries exports in 2014, expressed in value terms

Source: Trade map, 2015

**Figure 2** below shows the top 5 South African suppliers of fisheries between 2014 and 2013. South African imports have shown an increase from the reviewed suppliers except Thailand between 2013 and 2014. South African fisheries imports from Thailand decreased by 30%, this may be due to outbreak of Early Mortality Syndrome (EMS)

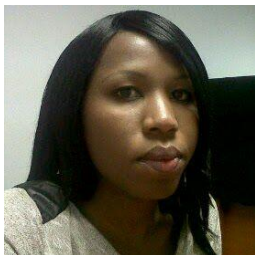
in Thailand that had created a shortage of stock. Nevertheless, Thailand is still on the top 5 suppliers to South Africa of fisheries and was the second on the ranking in 2014. Namibia and Thailand had been competitors in terms of supplying SA market in the past decade, followed by India and China.



**Figure 2:** Main suppliers of South Africa's fisheries exports in 2014, expressed in value terms  
**Source:** Trade map, 2015

**Conclusion**

China is a biggest trader of fisheries products. This shows that is market need to look at due to its demand on fishery products. It has been observed that South African is net exporter of fishery due to fact exports exceeds imports.. It has been noted that the imports are decreasing whilst exports increased over a period of 2013 to 2014 which made South Africa in a better position in terms of export earnings.



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**2. PRODUCT PROFILE: SUNFLOWER SEED (HS code 1206**

**Product description**

Sunflower seed is a fruit of the sunflower (*Helianthus annuus*). Sunflower seed is rich in monounsaturated, saturated and polyunsaturated fats. Sunflower seed is used for different activities such as processing into sunflower oil and oil cake. Sunflower seed is also well known for good animal feed. The seed is also consumed by human beings

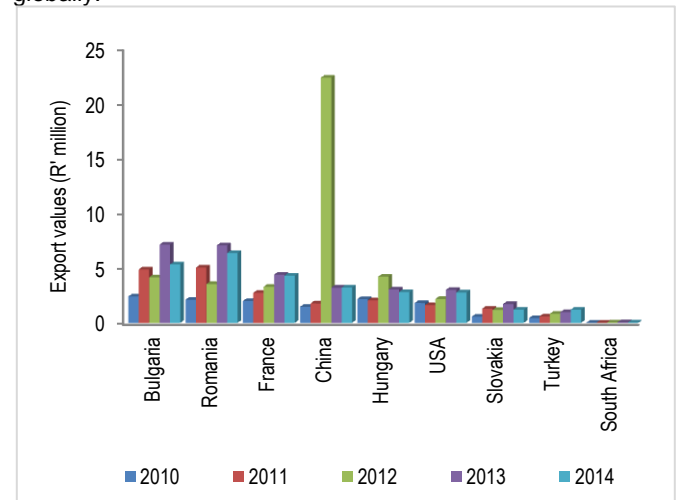
mainly as a snack and is used for to prepare various recipes.

**Sunflower seed production in South Africa**

Sunflower seed in South Africa is produced in the most summer rainfall prevalent areas in the country. The country produces average of 500 thousand to 700 thousand tons per year. The major producing provinces in the country are North West, Free State, Limpopo and Mpumalanga (DAFF, 2010). North West and Free State are responsible for 85% of the country's sunflower seed production. This grain crop is the third largest produced in the country after maize and wheat. Despite being the third produced crop in the country, the country is not one of the major role players globally. It contributes by 3% to the world sunflower seed market (DAFF, 2012). The country is the 10<sup>th</sup> largest producer of sunflower seed globally (South Africa. info, 2015). In the country, sunflower seed is mainly used as a source of vegetable oil.

**Global trade overview of sunflower**

**Figure 3** depicts sunflower exports by major exporting countries in 2014. The largest exporter of sunflower was Romania with the total of R6.3 million. Bulgaria was the second largest exporter with total of y R5.3 million, followed by France, and China total amount of R4.3 million, respectively in 2014 South Africa is ranked among world less sunflower exporters it is ranked at number 47 globally.



**Figure3:** Global sunflower export  
**Source:** Trade map 2015

**Figure 4** below shows sunflower imports by major consuming countries in the year 2014. The world top importer of sunflower in 2014 was Turkey with a value of R4.3 billion, followed by Netherlands with a value of R3.3 Billion, Germany with a value of R3.2 billion, and France with a value of R2.8 billion.. South Africa is ranked at number 50 globally in terms of sunflower seed import.

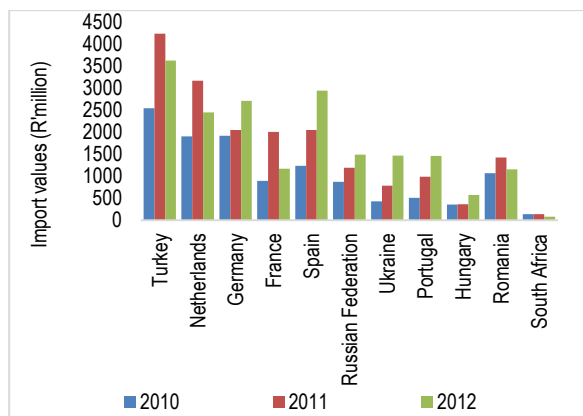


Figure 4: Global sunflower importers

Source: ITC Trade map, 2015

### South African Trade

The country exported about R30 million of Sunflower seed in 2014. Pakistan was ranked as the largest market destination for sunflower seed with a total value of R8.3 million equivalent to 27.2% in 2014. Kenya is second largest with a share of 26.6%, followed by France with share of 12.2%, and Botswana with share of 10.8 as shown in Table 3.

Table 3: South Africa export market

Importers	value in R'000		Share (%)
	2013	2014	
<b>World</b>	<b>30 839</b>	<b>30 552</b>	<b>100</b>
Pakistan	48 014	8 303	27.2
Kenya	208 450	8 119	26.6
France	81 925	3 735	12.2
Botswana	3 112	3 291	10.8
Malawi	0	1 569	5.1
Swaziland	4 471	1 245	4.1
Mozambique	94 962	1 082	3.5
Tanzania	40 332	1 006	3.3
Uganda	46 574	779	2.6
Namibia	9 930	725	2.4

Source: Trade map, 2015

The country's total import of sunflower seed amounted to R630 thousands Rand in 2014. Table 4 below shows the main suppliers of sunflower into South Africa. Romania was largest supplier commanding a share 88.2%, followed by Bulgaria with the share of 6.3%, and Botswana with the share of 3.5%.

Table 4: South Africa importers

Exporters	Imported value in 2013 (R'000)	Imported value in 2014 (R'000)	Share in South Africa Market (%) in 2014
<b>World</b>	<b>168</b>	<b>630</b>	<b>100</b>
Romania	135	556	88.2
Bulgaria	9	39	6.3
Botswana	2	22	3.5
Malawi	4	3	0.6
China	1	2	0.4
Argentina	4	2	0.4
Chile	202	2	0.3
Egypt	0	520	0.1
Israel	288	346	0.1
Turkey	739	260	0.0

Source: ITC Trade map

### Conclusion

Sunflower seed production is the third most produced crop in South Africa. In 2014 the country exported sunflower seed value of R30 million and imported R630 million. This makes the country a net importer of sunflower, despite large quantities produced locally.



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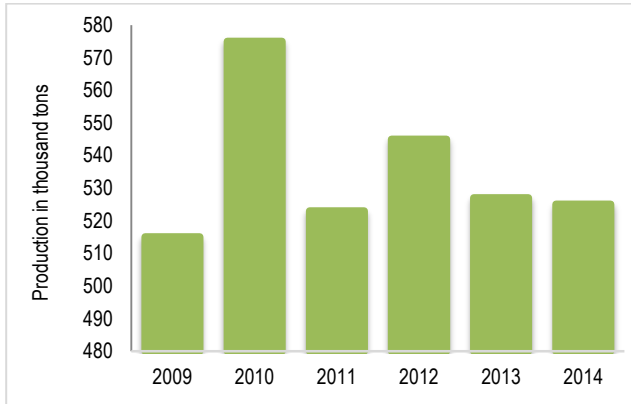
## 3. MARKET PROFILE: TOMATO

### Product description

Tomato is a true fruit that belongs to nightshade family, *Solanaceae* and botanically it is known as *Solanum lycopersicum*. Tomato is often glossy red fruit or berry and occasionally yellow, pulpy with a savoury flavour rather than a sweet taste. Botanically tomato is a fruit, however it is considered a vegetable for culinary purposes. It is mostly eaten as a vegetable or in salad. It can also be processed in a form of tomato paste, jam, juice, and sauce. Processed tomato can be used for health purposes such as cancer treatment, skin care and maintaining strong bones.

Approximately 214 million tons was estimated to be produced in the global market in 2013 (FAOSTAT, 2014). Of the global produced tomato, South Africa produced about 525 thousand tons in 2014, with Limpopo being the largest producer followed by the Mpumalanga and Eastern Cape. Production showed significant increase of 11.65%

between 2009 and 2010. In 2011 the production dropped by 9.04% and in 2012 it increased by 4.21%. The output further dropped by 0.38% from 2013 to 2014 (see Figure 5). The drop in production output in 2011, 2013 and 2014 is attributed by the unfavourable climate conditions.



**Figure 5:** Total production of tomato in South Africa.  
Source: Quantec easy data 2015

## Global Trade

**Table 4** lists the world's top ten exporters of tomato between 2009 and 2013. Netherlands has been the world's leading exporter for over ten years followed by Mexico (see **Table 6**). Mexico had increased its exports over the period of five years and has reached the same level of R18 billion with Netherlands in 2013, following Spain with the amount of R13 billion. Jordan was among to five exporters in the globe with largest growth rate of 117%, increasing from a value of R1 billion to R3 billion from 2009 to 2013.

**Table 5:** List of leading global exporters of Tomato

Exporters	Values in R' billion		Growth %	Share %
	2009	2013		
<b>world exports</b>	<b>58</b>	<b>85</b>	<b>46</b>	<b>100</b>
Netherlands	13	18	37	21
Mexico	10	18	75	21
Spain	9	13	33	15
Morocco	3	4	65	5
France	2	4	57	5
Turkey	3	4	11	4
Canada	2	4	49	4
USA	3	3	25	4
Jordan	1	3	117	4
Belgium	2	3	44	3

Source: Trade map, 2015

**Table 5** shows the world's leading importers of tomato between 2009 and 2013. The total world's imports shows an increase from a total value of R60 billion in 2009 to R88 billion in 2013 which equivalent to growth rate of 48%. The top three importers were USA, Germany and Russian Federation respectively accounting for 22%, 15% and 12% shares of the world imports in 2013. This shows that the

demand for tomato has been increasing for the past five years.

**Table 6:** List of leading global importers of Tomato

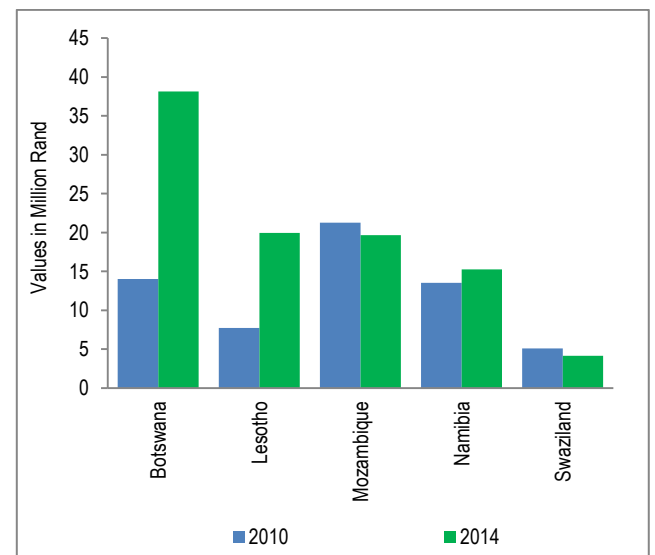
Importers	Values in R' billion		Growth %	Share %
	2009	201		
<b>World Imports</b>	<b>60</b>	<b>88</b>	<b>48</b>	<b>100</b>
USA	12	20	63	22
Germany	10	13	35	15
Russia	5	11	97	12
UK	5	6	18	7
France	4	6	28	6
Netherlands	2	4	60	4
Canada	2	3	38	3
Lithuania	0,4	2	393	2
Belgium	1	2	79	2
Poland	1	2	63	2

Source: Trade map, 2014

## South African Trade

**Figure 6** shows the destination for South African exports between 2010 and 2014. In 2010 South Africa exported a value of R71 million and in 2014 R101 million. South African exports increased by 40% from 2010 to 2014 which contributed a share of 0.1% of the world exports. Botswana being the leading importer for South African tomato and the value of tomato sent to Botswana was R38 million in 2014. Lesotho, Mozambique, Namibia and Swaziland were among the listed countries on top five leading importers of tomato from South Africa in 2013 and 2014 (see **figure 6**).

South African imported a total of R7.7 million in 2014. It has been noted that South Africa is self-sufficient in tomato production which is the reason are relatively low levels of tomato imports compared to exports in 2014.

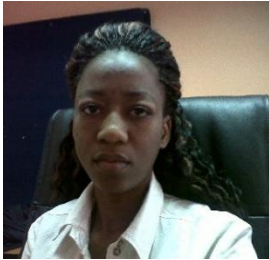


**Figure 6:** Destination of South African exports

Source: ITC, 2015

## Conclusion

The value of South Africa's tomato exports have been increasing for the past five years with a growth rate of 33% between 2009 and 2013. This shows a increasing demand for the product in the global market. South Africa is small player in the global tomato market with a contribution of 0.1% share to the global exports in 2013. It is important to note that the country is self-sufficient in tomato product and it is a net exporter of tomato.



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## 4. A review of Intra-African Agriculture, Forestry and Fishery (AFF) Trade

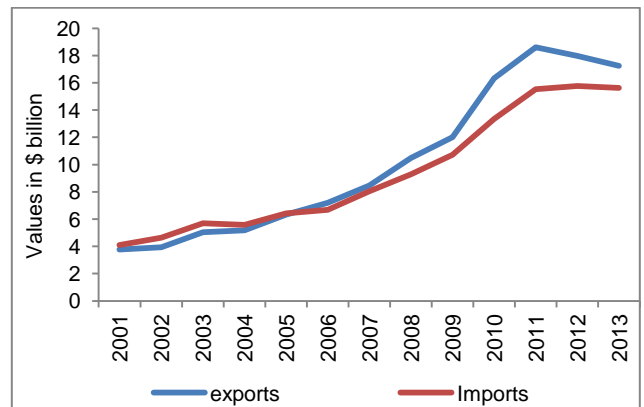
African is one of the growing continents in the world's market. Over the last decade the GDP of the African continent showed a significant growth of 5% on average (African Economic Outlook, 2014) compared to 3% global average growth in the same period. The factors behind economic boom in the Africa continent are improving macroeconomic management systems, high domestic demands and relatively more stable political environment. However, it has been noted that domestic demand has been the main driving force behind the growth in the continent through improvement of infrastructure investment and consumption patterns.

Despite African economic boost in the last decade, many countries are still facing range of challenges in terms of development. These challenges include food insecurity, high level of unemployment, poverty and inequality, commodity dependence, lack of economic transformation, infrastructure investment and low integration in the continent.

Despite the range of challenges in the continent, the total population is estimated to be 1.1 billion that need to be feed. Literature on development studies indicates that the continent is unable to feed its total population as many African countries still depends on foreign aid. Given the importance of food in curbing the poverty in the continent, this article reviews intra-Africa trade, specifically the Agriculture, Forestry and Fisheries (AFF). The article assesses the issues limiting intra-Africa trade and resolution towards resolving challenges currently facing the African continent.

## AFRICAN TRADE

In 2014, African continent traded a total of \$161 billion of AFF with the world. United Nations of Economic Commission for Africa (2014) reported that Africa's share in global trade is way below its potential. They further reported that Intra-African trade remains low and is mainly hindered by trade barriers among the African countries. **Figure 7** shows intra-Africa trade on AFF over the period of 13 years. It has been noted that AFF intra-trade had increased under reviewed period with exports amounting to \$17 billion and imports amounting to \$15 billion in 2013. Between 2012 and 2013 both imports showed a slightly decline which can be attributed by weak levels of integration and low investment in infrastructure in the continent.



**Figure 7:** Intra-Africa trade for AFF products  
Source: ITC, 2015

**Table 7 (see appendix A)** show most traded AFF products among the African countries. Cane sugar was the largest traded AFF product among the African countries as it appears high on both export and import lists. Frozen whole fish was second largest traded product with the total trade value (imports and exports) of R1.7 billion in 2013. Of trading countries in the African continent, South Africa is the largest supplier of these products. It has been indicated by the political and economic commentators that South Africa is the gateway to increase intra trade in the African continent. Hans and Sandrey (2015) supported that South Africa is likelihood that will have largest percentage in intra-African trade.

It has been noted that most of African strategic products does not trade with each other. Furthermore does not trade manufactured AFF products among themselves due to low capacity of infrastructure. The main factors that limit intra-Africa trade are low participation in global value chain, industrialization, weak economic integration, economic diversification and border issues (Kimenyi, Lewis and Routman, 2012). For example inadequate infrastructure on railways, roads, water and other physical infrastructure limits trade within and between African countries.

## Path to increase intra-Africa AFF trade

The growth of African integration can be achieved through the following recommended platforms;

- Firstly, revision of the African trade policy. The African trade policy should ensure that implementation of the regional trade agreements play an important role in regional economic integration, infrastructure development and industrial development among African countries;
- Secondly, through reducing the cost of customs and transit procedures, documentation and regulations at the borders of different countries;
- Thirdly, in order to improve the productive capacity among the African countries, an encouraging investment among African countries to participate in regional enterprises and value chain;
- Fourthly, is through inclusion of private sector that could assist in achieving structural diversion and promoting intra-African trade; and
- Lastly, the establishment of the Continental Free Trade Area (CTFA) could be answer to increase intra-African trade. Through the elimination of tariff and non tariff barriers (NTBs) will allow the free movement of people, goods and services in the African continent. Hans and Sandrey (2015) reported that African countries will benefit in the elimination of tariff and NTBs. The authors noted that South African will be the biggest gainer among the Africa countries.



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## 5. South Africa's Agricultural Market and Product Diversification

The South African agricultural export has seen a significant growth between 2004 and 2014 triggered by the sector's reform in the late 1990s and expanding market access with improving access conditions in the early 2000s. The country's agricultural exports increased from R23 billion in 2004 to R105 billion in 2014 registering a growth rate of 135% over the reviewed period when measured in value terms. In 2014, the country's agricultural exports were

valued at R105.7 billion and the highest value are attributed to exchange rate that favored agricultural export in 2014. The purpose of this paper is to evaluate the country's export composition to various markets.

It is evident from **Figure 8 (see appendix B)** that the country has experienced a significant growth in exports but the country's export markets have remained relatively the same over the reviewed period indicating that South Africa is not adequately diversifying its markets. Market diversification may be defined as expansion across the borders of global regions and countries into different geographical locations, or markets. Diversification is important because it enables the country to exploit new foreign market opportunities, thereby reduce the risks associated with high dependence on few well established export markets. South African agricultural exports to new markets (outside Euro zone) have remained low except export to East Asia, Middle East and Africa regions. All the mentioned market are increasingly become important markets for South African agricultural exports as both these regional markets experienced a growth rates of 287 %, and 361% and 866% respectively during the reviewed period.

**Figure 9** indicates the market share of leading destination markets in South African agricultural exports. From this graph it is clear that there is a gradually change in market diversification that has taken place in the reviewed period. Under reviewed period EU 28 market has been losing its market share from 48% in 2004 to 24% in 2014, although some instability has been observed in certain years. Africa has been gaining market share from 21% in 2004 to 46% in 2014. Middle East and East Asia has been relatively stable at average share of 7% and 8% respectively over the measured period. The conclusion that can be derived from **Figure 8** and **Figure 9** is that South Africa had tried their efforts to diversify its agricultural export markets through increasing their share in the African market.

**Table 8** (see appendix A) shows the top agricultural products exported from South Africa to the world in 2004 and in 2014. It is evident that the country's export product mix (i.e. product diversification) has not changed. As it was in 2004, the county's top agricultural export products are still dominated by maize, oranges, wine, sugar, apples, table grapes and wool. It is interesting to note that the country's export basket is slowly shifting from exporting mainly unprocessed towards processed agricultural products. In 2004, unprocessed products accounted for 51.3% of total agricultural exports and this has gradually declined to account for 15.7% of total exports in 2013. At other side processed agricultural exports had increased from 48.7% in 2004 to 86.3% in 2013. The processed agricultural export products are dominated by wine, spirits and prepared food products.

## Market and Consumer Preference in Emerging Markets

It is evident from sections above that the bulk of South African agricultural exports are still destined to traditional European markets. It has been noted that European Share

has been losing it over the African market. The South African export basket and market split remained more or less the same over the reviewed period. In recent years, emerging markets particularly, Asia markets have demonstrated a potential when measured in terms of consumer size, purchasing power increases and formal retail evolution. The bulk of market research studies argue that Asia consumers and market structures are very different to their counterparts located in Europe.

The Asia consumers are rapidly becoming health and environmental conscious and are starting to show high preference to food products that promotes and offer health benefits. The Asia consumers also shows great appreciation of high quality products as they are prepared to pay more for imported high quality products compared to domestic marginal quality products (Yu, 2012). Furthermore, Asia consumers are increasingly becoming aware of brands and value attached to certain brands. This suggests a need to engage in strong and effective consumer promotional campaigns in Asia to enhance the awareness of South Africa brands and products in Asia markets. Both domestic and foreign companies supplying Asia markets are actively engaging in R&D and marketing of healthy and environmental friendly products.

The food and beverages sales are increasing in Asia driven by growing disposable income and expanding middle class consumers. **Table 9** shows the growth in retail sector in various regions across the world. The retail sector in Asia and Australasia has recorded a strong and positive growth in the past four years despite the global economic meltdown that occurred in 2008. The retail sector is expected to increase by at least 6% until 2015 driven largely by food and beverage sales. China is the main engine behind this strong positive growth; however, other countries like Vietnam, Singapore and Indonesia are showing strong development in retailing sector, attracting even foreign retails. Yu (2012) reports that food and beverage sales accounts around 50% of total retail value in countries like Singapore, Malaysia and Vietnam.

On the other side, with the growing population in the Africa, with the forecast of about to 2 billion populations from current 1.2 billion populations reside in Africa. This is an indication that consumers will purchases purchase at daily basis due to higher density of population expected. Furthermore, urbanization in the African has increasing in recent years with about two third expected to live in urban area in the African continent. This is an indication that consumers will purchase and services.

Currently, an African consumer heavily depends on cheap food products and nutritional transition still focus on quantity rather than quality. With expected increase in population and income; however African consumer's present lucrative opportunities to increase in demand of food more particular quality produce food.

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## Appendix A

**Table 7: Traded AFF products in Africa**

HS Code	Product description	Values in \$Million	Main exporters	HS Code	Product description	Values in \$billion	Main importers
2401	Tobacco	1139	Zimbabwe (76.4%), Zambia (8.8%) and Uganda (6.4%)	0303	whole Fish	986	Malawi (23.1%), Kenya (18.7%) and Zimbabwe (17.1%)
1701	Cane sugar	1131	South Africa (30.5%), Swaziland (14.7%), and Egypt (12.6%)	1701	Cane Sugar	861	South Africa (19.5%), Sudan (17.3%) and Zimbabwe (9.8%)
0303	Whole fish	728	Namibia (42.6%), Mauritania (12.9%) and Senegal (11.9%)	0902	Tea	507	Egypt (52.3%), Kenya (32.3%), South Africa (8.6%)
0902	Tea	548	Cote d'Ivoire (34.6%), Uganda (24.05%), and Rwanda (15.7%)	1005	Maize	436	Zimbabwe (24.9%), Namibia (12.9%) and Botswana (11.4%)
1005	Maize	504	South Africa (55.6), Zambia (30.7%) and Uganda (5.5%)	2402	Cigars	423	Botswana (13.5%), Mauritius (12.3%) and Niger (10.5%)
2402	Cigars	458	South Africa (37.6%), Nigeria (15.6%) and Kenya (14.8%)	2401	Tobacco	371	Malawi (23.1%), Kenya (18.7%) and Zimbabwe (17.3%)
1101	Wheat flour	356	Morocco (22.09%), South Africa (21.3%), and Tanzania (10.9%)	1511	Palm oil	348	Nigeria (20.3%), Senegal (16.8%), and Mali (9.9%)
0901	Coffee	334	Cote d'Ivoire (34.6%), Uganda (24.1%), and Rwanda (15.4%)	0901	Coffee	342	Algeria (40%), Sudan (25%) and Morocco (13.4%)
1511	Palm oil	326	Cote d'Ivoire (55.5%), To go (12.8%)Uganda (12.4%),	1101	Wheat Flour	318	DRC (24%), Guinea (15.5%) and Sudan (**)
0709	Vegetables	324	Ethiopia (82.1%), Zambia (7.2%) and South Africa (5.4%)	0709	Vegetables	314	Somalia (71%), Djibouti (13.7%), and DRC (4.6%)

Source: Trade map, 2015

**Table8: South African agricultural product diversification: 2004-2014**

2004				2014			
HS Code	Product	Product Export Value: R Million	Product Share in Export: %	HS Code	Product	Product Export Value: R Million	Product Share in Export: %
220421	Wine	2783	12.3%	080510	Oranges	6471	6.2%
080610	Grapes	1822	8.0%	220421	Wine	5500	5.2%
080510	Oranges	1755	7.8%	080610	Table Grapes	5402	5.1%
08010	Apples	1157	5.1%	100590	Maize	4878	4.6%
170111	Cane sugar	882	3.9%	080810	Apples	3839	3.7%
220429	wine	609	2.7%	510111	Wool	2694	2.6%
100590	Maize	540	2.4%	220429	Wine	2657	2.5%
080540	Grapefruit	529	2.3%	170114	Sugar	2544	2.4%
080820	Pears	517	2.3%	080550	Lemons	2455	2.3%
170199	Cane sugar	2783	2.2%	210690	Food Preparation	2077	2.0%

Source: WTA, 2014

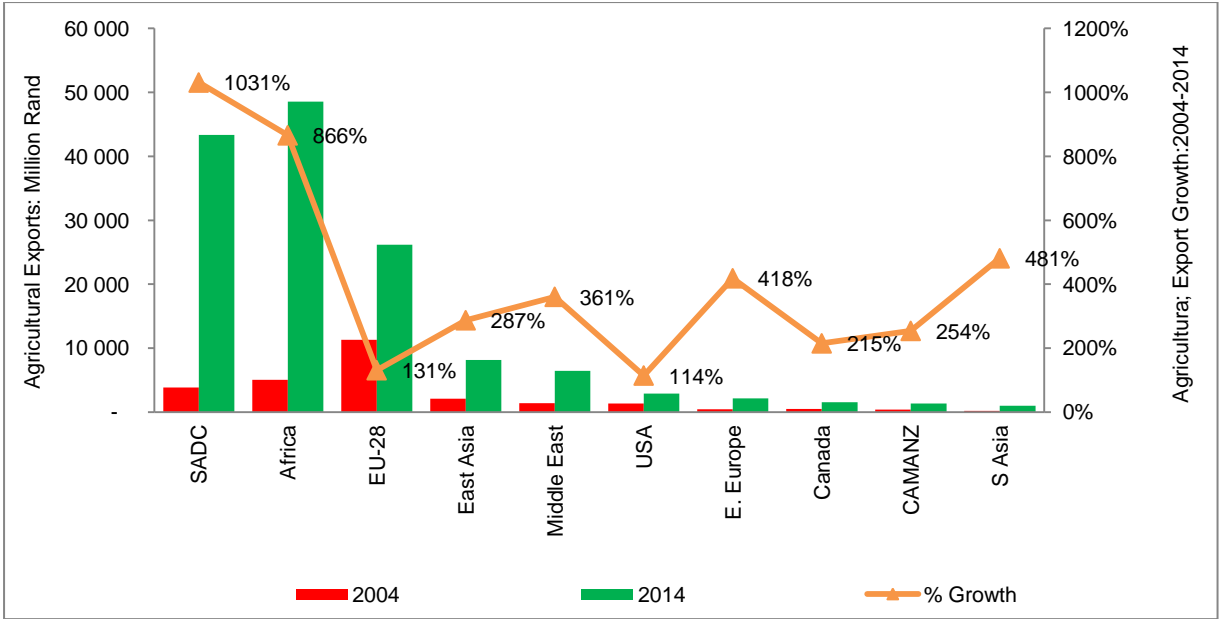
Note: Figures of unprocessed and unprocessed for 2014 are figures of the previous year

**Table 9: Global retail sales growth by volume (percent change per annum)**

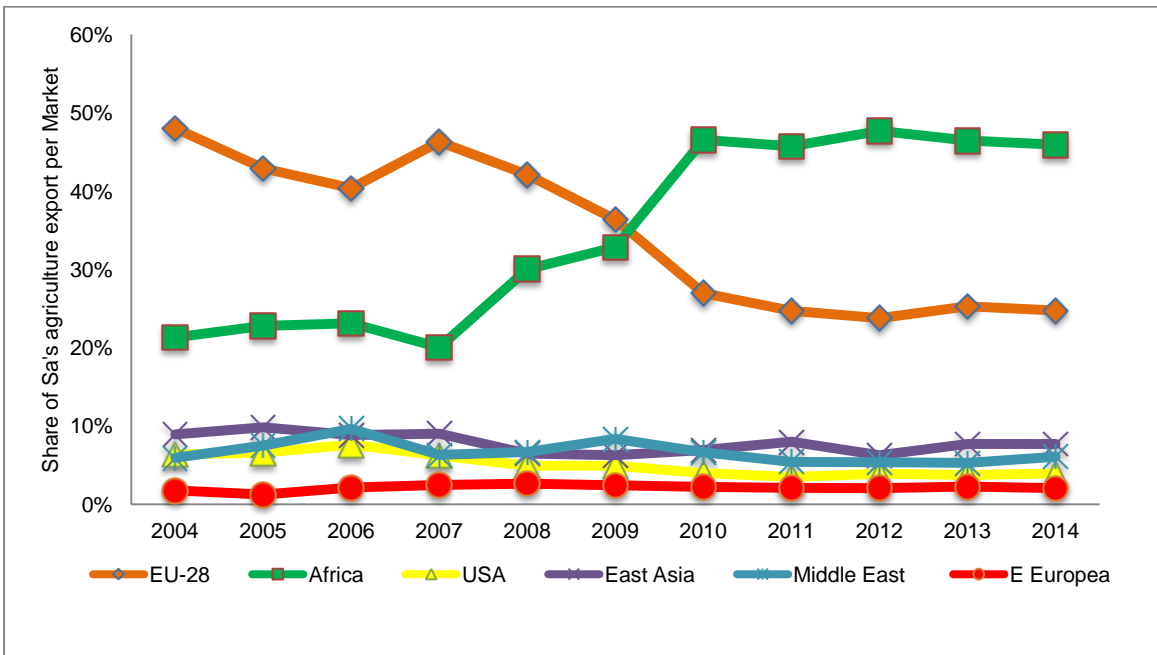
Region	2008	2009	2010	2011	2012	2013	2014	2015
Asia and Australasia	5.1	5.2	9.1	4.6	5.6	6	6.2	6.4
Economies in Transition	6.5	-5.2	3.6	4.1	4.5	4.4	4.4	4.4
Latin America	4.8	-0.2	6.2	4	4	3.6	3.9	3.7
Middle East and North Africa	3.2	4.4	3.8	2	3	3.5	3.7	3.7
North America	-1.1	-5	4.8	2.1	1.2	1.1	1.3	1.4
Western Europe	-0.9	-1.8	0.3	-0.4	0.3	0.6	0.9	1.2
World	1.9	-0.3	5.4	2.9	3.2	3.4	3.7	3.9

Source: Adapted from Yu, 2012

## Appendix B



**Figure 8:** South African agricultural export growth to leading destination markets: 1996-2012  
**Source:** WTA, 2013  
 Note: CAMANZ-Include Chile, Argentina, Mexico, Australia, and New Zealand



**Figure 9:** Market share changes of leading destination markets in South African agricultural exports  
**Source:** Trademap, 2015

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