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**agriculture, land reform
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Agriculture, Land Reform and Rural Development
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Promoting market access for South African agriculture

FOREWORD

Welcome to the eighty-third (83rd) issue of the Trade Probe publication produced under the Markets and Economic Research Centre (MERC) of the National Agricultural Marketing Council (NAMC). The purpose of this issue is to provide a detailed analysis of the current trade issues within South Africa and also regarding its trading partners. As the year draws to an end, it is important to provide a summary of trending issues within the agricultural sector that happened during the year. The topics of interest covered include the implication of Kenya and the USA negotiating a bilateral free trade agreement; the status of the oilseed market amid the coronavirus pandemic; and lucerne hay as a pillar for improving South Africa's agricultural export performance. The main objective of the publication is to inform policymakers, producers, traders and other stakeholders about agricultural trade trending issues, and to provide information on market opportunities and potential products demanded in the local and international markets.

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Kenya and the USA are negotiating a bilateral free trade agreement. What are the implications for South Africa's Agricultural trade?

By Moses Lubinga

Developing countries are sometimes granted preferential trade arrangements, such that their products gain market access into several developed economies. The United States of America (USA) is one of the many lucrative markets looked to by developing economies. Two preferential treatments are granted to developing countries, i.e. the Generalised System of Preferences (GSP) and the African Trade and Opportunities Act (AGOA), which is scheduled to expire in 2025. However, to benefit from AGOA, a country must be eligible for the GSP system. Despite the recent presidential elections that saw the approaching exit of Mr Trump from the White House, the USA under the leadership of Mr Trump had embarked on two initiatives of utmost importance to Africa. First, the assessment of the eligibility South Africa's goods for duty-free access into the USA. South Africa is one of the few shortlisted countries that may be removed from the list of preferential treatment beneficiaries come 2025, and this is bound to negatively affect agricultural trade exports destined to the USA, as products will then be subjected to a general duty as any other product from other countries. Second is the USA's launching of negotiations for a bilateral Free Trade Agreement (FTA) with Kenya to further strengthen their strategic partnerships. According to the USA,

this agreement is foreseen to serve as a model for additional agreements across Africa, despite criticism from members of both the East African Community (EAC) and the African Continental Free Trade Agreement (AfCFTA), who reckon that it is not for an individual country to pursue bilateral trade deals with third parties.

When this FTA comes into effect, it will be the USA's first-ever bilateral deal with a country in the Sub-Saharan region, and it is anticipated to have significant consequences on intra-Africa trade in general, as well as spurring on Kenya's influence on the continent. Given Kenya's geo-strategic position, and being one of Africa's fastest growing economies, coupled with the fact that South Africa's products may no longer be eligible for preferential treatment come 2025, it is concerning how South Africa's agricultural exports to the USA are likely to be affected by the USA–Kenya trade arrangement. Although some protagonists view this bilateral trade deal as a move aimed at neutralising the influence of China in Africa, little is known about its likely implications for South Africa's agricultural trade with the USA.



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In this article, therefore, I assess the extent to which the two countries have so far made use of the existing preferential treatments and also provide an insight into the agricultural products that are likely to be the most affected. The assessment compares how South Africa and Kenya have used the AGOA and GSP schemes in 2018 and 2019.

Agricultural trade data shows that South African exports to the USA were five (5) and seven (7) fold as much as Kenya's exports in 2018 and 2019, respectively. Furthermore, data reveals that Kenya's agricultural exports (by value) eligible for preferential treatment decreased by 20% between 2018 and 2019, while South Africa's increased by 4%. For Kenya, the major driver in the overall decline is attributed to a 47.6% decrease in the value of products that were exported under the AGOA

preferential arrangement, although most agricultural products, accounting for a 71.2% increase during the same period, benefited from the GSP arrangement. For South Africa, the highest increase (13.5%) was observed in the use of the GSP arrangement, while AGOA registered a 5.2% increase in its use during the period under review.

According to Table 1, large proportions (65.6% in 2018 and 62.5% in 2019) of Kenya's agricultural exports destined for the USA did not use any of the preferential trade schemes, while for South Africa, about 22% did not claim any programme during the same period. The use of the preferential trade regimes by South Africa, therefore, possibly explains the higher value of exports destined for the USA when compared with Kenya's exports.

Table 1: Utilisation of AGOA and GSP regimes by Kenya and South Africa, 2018–2019

		Utilisation rate		
		2018	2019	% change in utilisation rate
Kenya	Value of eligible products (US\$ Million)	20.1	16.2	
	AGOA (excluding GSP)	24.2%	15.8%	-34.8%
	GSP	10.2%	21.7%	113.3%
	Utilisation of AGOA & GSP combined	34.4%	37.5%	9.0%
	No Programme claimed	65.6%	62.5%	-4.7%
South Africa ¹	Value of eligible products (US\$ Million)	102.3	106.3	
	AGOA (excluding GSP)	56.7%	55.7%	-1.9%
	GSP	20.7%	22.6%	9.4%
	Utilisation of AGOA & GSP combined	77.4%	78.3%	1.1%
	No Programme claimed	22.6%	21.7%	-3.9%

Source: Data web US (2020)

Overall, South Africa's utilisation of the AGOA and GSP regimes during the period under review is much higher (about 77.5%) than Kenya's (range 34%-38%). Although both countries registered an increase in the utilisation of the regimes, South Africa uses the AGOA more than the GSP, while for Kenya, there was a fluctuation during the period under review. At product level, for both countries, macadamia nuts are the most exported commodity under the AGOA arrangement. In 2019, South Africa's macadamia nuts exports to the USA were valued at US\$108.3 million, which is twice as much as what Kenya exported. Another key product exported by both countries under AGOA is 'other Nuts' (080290) but still, South Africa exported thrice as much as Kenya does.

Conclusion

Kenya's unilateral decision to negotiate a bilateral trade arrangement with the USA was not well received by other African member's states, especially under the frameworks of the EAC and the AfCFTA. Unlike South Africa, Kenya's agricultural trade that utilises the existing preferential treatments is very small and there are very few similar agricultural products that are exported by the two countries to the USA. With the exception of macadamia nuts, 'other nuts' (080290), and a few products under HS code 9, Kenya and South Africa export different agricultural products to the USA. Thus, notwithstanding the possible removal of South Africa from the list of preferential treatment beneficiaries, South Africa's agricultural trade with the USA is not bound to be much affected by the proposed USA–Kenya FTA. The macadamia industry in South Africa should, however, be aware of the fast-growing macadamia production in the East African region, especially in Kenya and Tanzania, from which stiffer competition is bound to arise, should the USA–Kenya FTA grant greater market access benefits for this product into the USA.

¹Values of 2018 slightly differ from those reported in an earlier article featured in Trade Probe Issue 79, given that products like wool, hides and skins have also been considered in this case.

The status of the oilseed market amid the coronavirus (COVID-19) pandemic

By Fezeka Matebeni

The bulk of oilseeds, such as soybeans and sunflowers, are crushed to produce both vegetable oil for human consumption and protein meal for inclusion in animal feed rations. Sunflower seed is a higher-yielding oil seed and is therefore more orientated towards human consumption, whereas soybean seed has a higher protein content, with protein meal being the main product (BFAP, 2020). The sentiment around 2020/2021 global grain and oilseed production is now somewhat less optimistic due to a possible downward revision to the respective harvests. This comes amid doubts over the potential size of South American and Black Sea grain and oilseed harvests because of dryness threatening crops. According to the United States Department of Agriculture (USDA), the world oilseed production is expected to decline by 8 million tons from the October 2020 annual yield, and reach only 597 million tons for the period from November 2020 to November 2021.

The November 2020 decrease was attributed to the lower soybean output in the United States (US), Argentina and India, and to lower sunflower seed production, predominantly in Ukraine and Russia. Dry weather is associated with the reduced sunflower seed yields in Ukraine and Russia, leading to a combined 1.5 million ton decline in the projected output in November 2020. In accordance with the projection made in May 2020, the production went down by 5.3 million tons in Ukraine and Russia, compared with 2019/20 production year. This also includes a decrease in production in the European Union (EU), Kazakhstan, Turkey and Argentina.

On the demand side, in 2020/21, global oils or fats consumption is forecast to resume growing, following coronavirus (COVID-19) related stagnation in the food and non-food sectors in 2019/20. For soy products, such as meals or cakes, global utilisation is expected to rise modestly for a second successive season, as world demand for feed continues to recover from the effects of African swine fever outbreaks in Asia. The International Grains Council (IGC) (2020) reported that continued recovery in Chinese animal feed demand is expected to underpin a record uptake, and gains are likely to be seen across a range of smaller consumers in some regions. This reflects prospects for reduced availabilities of alternatives, notably rapeseed/canola and sunflower seed.

Soybean export prices for the world's top three exporters all strengthened for a fifth straight month, reaching the highest prices since July of 2016 for the US and Argentina, and since September of 2014 for Brazil. Prices continue to surge, based on strong export demand, depleted South American supply, and lower carry-over from 2019/20 (USDA, 2020). Global oilseed ending stocks were reported to decline by 3 million tons to 99 million tons, primarily due to lower soybean ending stocks in the US. Lower production is projected to reduce soybean and sunflower seed, with only minimal impact on global export volumes. The closing stocks for soybeans are forecasted to decrease from 46.9 million tons to 46.5 million tons in 2020/21, as illustrated in **Table 2**.

Table 2: Global soybean estimates, million tons

	Opening stocks	Product	Imports	Total Supply	USE				Exports	Closing stocks
					Food	Feed	Crush	Total		
2018/19	47.6	363.0	151.6	410.5	19.3	14.3	305.1	348.4	151.6	62.1
2019/20 (est)	62.1	338.3	167.9	400.4	20.5	14.8	309.2	353.4	167.9	46.9
2020/21(f'cast)	46.9	370.0	166.8	416.9	21.2	14.5	325.2	370.4	166.8	46.5

Source: IGC, 2020

South Africa's oilseeds market analysis

Soybean production in South Africa is dominated by what is achievable within the limitations of climate, soil and farming practices. There is still a wide choice of well-adapted cultivars to choose from to produce soybean (Oilseeds Focus, 2020). South Africa had the third-largest soya bean harvest on record of 260 million tons in 2020. This process has led to a notable increase in global soya bean imports in the recent months and, in turn, prices. South Africa's soya bean prices tend to follow global soya bean prices, in part because of the import dependence status. South Africa imports approximately half a million tons of soybean meal per year. Therefore, the uptick in global soya bean prices has influenced domestic soya bean prices. For instance, South Africa's soybean spot price traded at R8 100 per ton in September 2020, higher by 39% year-on-year. These price increases are precipitated by the weaker domestic currency, coupled with growing demand globally.

The most recent estimates from the South African Grain and Oilseeds Supply and Demand Estimates Committee, NAMC (2020) suggest that in the new season, 2020/21, the total supply of soybeans is anticipated at 1 519 305 tons for the 2020/21 marketing season. On the other hand, the total South African demand, which includes exports for soybeans and is projected to be lower than the supply, amounts to 1 398 200 tons. The projected closing stock level on 28 February 2021 is estimated at 121 105 tons. At an average processed quantity of 115 417 tons per month, this represents available stock levels for a month or 32 days in the country. In terms of sunflower, the total supply of sunflower seed is projected at 926 735 tons for the 2020/21 marketing season sunflower seed is projected at 834 350 tons. The projected closing stock level on 28 February 2021 is estimated at 92 385 tons. At an average processed quantity of 68 925 tons per month, this represents available stock levels for 1.3 months or 41 days.

In October 2020, the Soybeans and Sunflower production deliveries were recorded at 2 675 tons and 595 tons respectively. For the first week of November 2020, South African producers reported having made 290 tons of Soybeans, and 349 tons of Sunflowers, production deliveries, as illustrated in **Table 3**.

Table 3: Weekly production deliveries of Soybeans and Sunflower

Week	Prod deliveries (Tons)	
	Soybeans	Sunflower
26/09 - 02/10/2020	608	147
03/10 - 09/10/2020	918	92
10/10 - 16/10/2020	714	21
17/10 - 23/10/2020	260	52
24/10 - 30/10/2020	175	283
31/10 - 06/11/2020	290	349

Conclusion

Globally, both oilseeds and derived products prices increased markedly in recent months. Prices in the oil crops complex are expected to be influenced by the further evolvement of the coronavirus disease (COVID-19) situation, as well as by weather conditions in South America and Southeast Asia. Furthermore, there is a positive forecast that South Africa's agriculture will again show positive growth in 2021, although at a much lower rate than the 10% year-on-year expansion that is currently expected in agriculture's gross value added for 2020. There are intentions of expanding planting area for grains and oilseeds by 5% in 2020/21 production season, compared with the previous season (2019/20). Along with favourable weather conditions, the country could experience another significant harvest in 2020/21 season, as reported in Supply and Demand Estimates. With the 5% intended increase of planting area, the new planting area extent will reach 4.15 million hectares. However, the sunflower seed planting area could fall by 4% year-on-year due to the anticipated shift to white maize planting. With the current planting area intended specifically for soybean production, an increase in soybeans harvest might not have a significant impact since South Africa is a net importer of soybean, with imports estimated at approximately 500 000 tons (soybean meal), mainly for livestock feeds. The country will still be dependent on imports to meet the growing demand for soybean meal, mainly for the poultry industry.



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Lucerne hay farming in South Africa holds potential for export

By Lucius Phaleng

Lucerne is regarded as the best legume crop to be planted in South Africa and is commonly used to produce good-quality hay, especially under irrigation. Its production can be divided into nine different classes according to its winter dormancy. It is adapted to a wide variety of conditions, from clay to sandy soils and cold to hot areas. It survives under rain conditions of as low as 400 mm per annum, especially in soils with a good water holding capacity. Lucerne grazing is mainly used in the following regions in South Africa: south Western Cape, Northern and Eastern Cape, eastern Free State, North West province and Mpumalanga. It is rarely cultivated in the southern, high-potential areas of KwaZulu-Natal because of the high incidence of leaf diseases and the low pH of the soil.

Lucerne possesses greater export opportunities for farmers in South Africa and planting lucerne serves as a cornerstone for sustainable intercropping and animal production systems. The plant is well adjusted to perform best in almost all areas of

South Africa; however, its quality production prefers deep, well-drained soils with neutral to high pH. The sustainability and profitability of lucerne hay production in South Africa are dependent on the continued adoption and deployment of new cultivars with superior yield, quality and disease resistance characteristics. Cultivar selection plays a critical role in producing high yields of good quality lucerne at the same production cost.

For the 2019/20 season, 410 660 tons of lucerne hay were locally produced and certified by the National Lucerne Trust (NLT), representing increases of 36.48%, 46%, 48.35% and 0.17% over other lucerne organisations or individual producers, respectively, as depicted in the figure below. The increase in lucerne hay during the past production seasons is mostly because more producers, traders, exporters and end-users are using the NTL-Scheme to grade their lucerne hay, and not necessarily due to an increase in lucerne hay produced in South Africa.

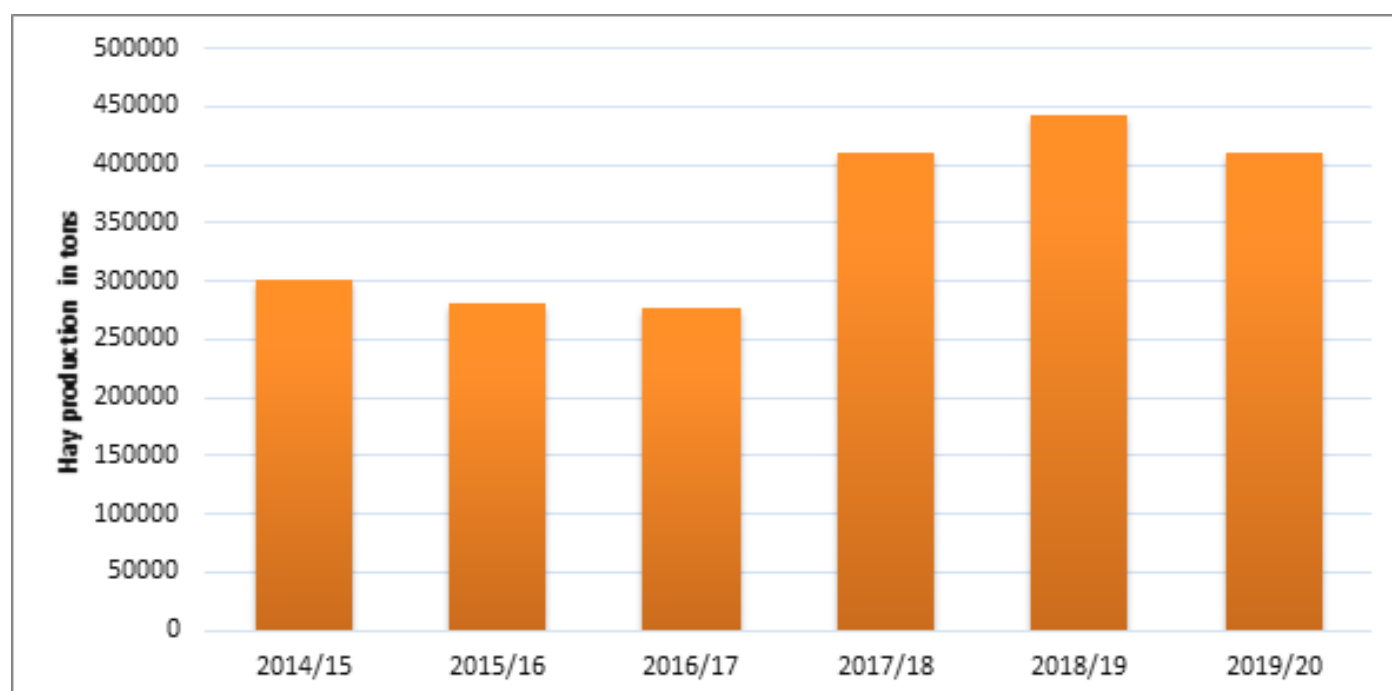


Figure 1: Lucerne hay production, 2014/15 – 2019/2020

Source: NTL (2020)

It has been a challenging 2019/20 production season in terms of quantity and quality hay produced across South Africa, and more specifically in the Northern Cape province of South Africa. The lucerne hay produced locally amounted to about 410 660 tons, which is 7.09% decrease when compared with lucerne hay produced during 2018/19 (441 976 tons). This was due to the fact that producers could not achieve maximum yields as expected, due to erratic and excessive rain during the first quarter of 2020 in the Northern Cape region.

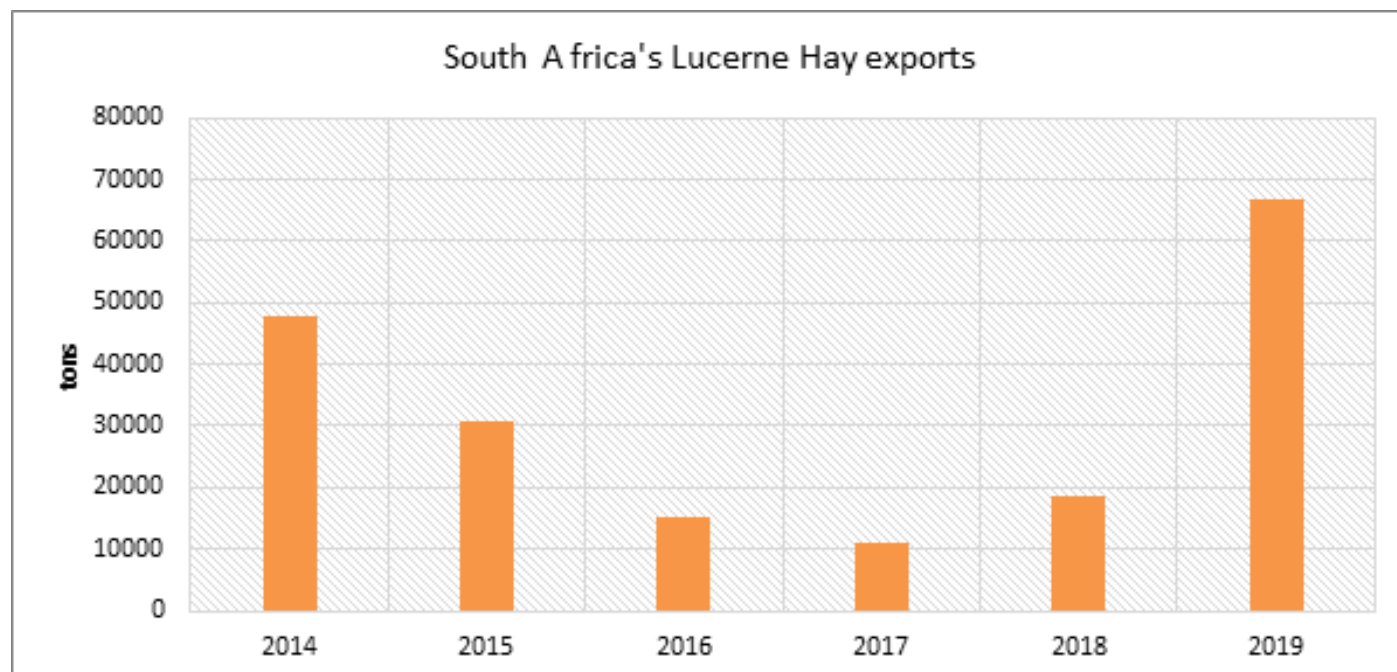
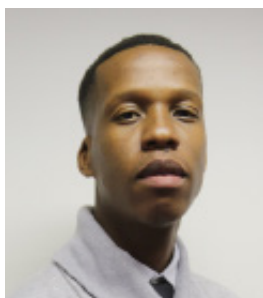


Figure 2: South Africa's lucerne hay exports, 2014 – 2019

Source: Global Trade Atlas (2020)

Despite the negatively affected yield, the lucerne industry still holds great potential for improving its exports to the global markets. Larger shares of lucerne hay exports are destined to Africa and the Asia continent; however, there is untapped potential in other regions such as Europe and the Middle East. In 2019, South Africa managed to export about 66 952 tons, which is a 71.2% increase when compared with 2014 (47 690 tons) exports. There is a growing potential for Asian markets, especially Chinese markets, and this is due to China's lucerne hay protocol. Lucerne hay is a major ingredient in China's expanding dairy sector and these products appear to have even greater market potential in China.

Therefore, the lucerne hay protocol aims to ensure the safety of South Africa's lucerne hay exports to the Republic of China. The protocol aims to improve on the volumes of lucerne hay exports destined for China and trade data showed that exports have increased to the Chinese market since the establishment of the protocol.



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Brazil, Russia, India and China (BRIC) and the contribution of BRIC to South Africa's export diversification

By Onele Tshitiza

Trade relations are important for any country to thrive in the international market, especially through trade liberalisation, the reduction of barriers such as tariffs, and improving ease in trading. As such, South Africa has negotiated trade agreements in order to better coordinate resources and work with other countries to ease the trading environment and encourage market access in those countries. These partnerships can be presented in the form of trading blocs. South Africa joined one such bloc in December 2010 with Brazil, Russia, India and China because these countries found common realities as developing economies. The cooperation was intended to strengthen trade and information sharing, and encourage technology transfer and economic growth, among other things. The five countries held their twelfth annual summit virtually on 17 November 2020, against the backdrop of the global Covid-19 pandemic, with Russia being the host nation. The various country leaders spoke about the challenges of the coronavirus pandemic and how each country was dealing with them. The leaders discussed how to better collaborate in fighting the disease, while ensuring recovery and growth in their economies. This article seeks to assess whether South Africa has gained in terms of trading with member countries in the bloc, and how the country could otherwise seize more opportunities.

BRICS countries are noted for contributing 23% to the global gross domestic product (GDP) and 18% share in global trade. China makes up the largest share of the group's GDP (68%) and South Africa the lowest (1.7%). South Africa has gained some ground in the last couple of years in accessing agricultural markets in the BRIC countries. South Africa's biggest trading partner in agricultural products amongst BRIC countries is China, accounting for more than a 57% share, followed by Russia (about 27%), India

(about 13%) and Brazil (3%). BRIC countries made up roughly 7% of the value of all South Africa's agricultural exports (HS codes 1-24) to the world in 2019. However, these countries made up 14% of South Africa's value in imports from the rest of the world. In 2019, the country exported a total of R 9.526 billion worth of products and imported R13.203 worth of products. South Africa continues to experience a negative trade balance with the BRIC member countries in agriculture, ranging from R3.88 billion in 2010 to R3.68 billion in 2019. Our negative trade balance since 2012 had been in the region of above R8 billion until it went down to R5 billion and R3 billion in 2018 and 2019, respectively.

Table 4 shows South Africa's agricultural exports To BRIC countries before they joined the group and after. South Africa's largest value of exports to BRIC countries was greasy shorn wool, valued at R2.5 billion in 2019, of which over 50% was exported to China, with 5% going to India. Before joining the trading bloc, South Africa was not exporting the majority of the agricultural products it is exporting today. The majority of oranges went to China. China also mostly imported macadamia nuts, grapefruit, wine, raw cane sugar and frozen meat of bovine animals, whereas India imported mainly cane sugar, pears and cotton linters. Russia's demand was for citrus and pome fruits, as well as wine. South Africa's trade with Brazil is quite small and the country imports mainly wine and vegetable seeds for sowing, as well as liqueurs and cordials. Brazil has been able to increase its yields for many of its crops by using technological advancements, making them net exporters of agricultural products such as oilseeds, grains and meat products. South Africa is, therefore, a smaller player in agricultural trade in comparison to Brazil.

² Agricultural products according to WTO HS codes.

Table 4: South Africa's agricultural exports to BRIC countries

HS code	Product description	Value in R' Million										
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
51011100	Greasy shorn wool											
08051010	Fresh oranges	1047	679	1025	1713	2099	2166	2404	2933	3451	3683	2597
08029000	Nuts	0	10	589	638	773	866	982	1067	1661	1893	1638
17011400	Raw sugar	0	0	0	0	3	20	122	18	28	495	1169
08083000	Pears	0	0	0	0	72	0	0	0	154	521	706
22042141	Wine	0	0	0	170	188	225	220	298	418	542	595
08026100	macadamia nuts	0	0	177	181	261	298	522	599	557	586	523
08054010	grapefruit	0	0	0	2	3	0	164	25	110	289	485
08052110	mandarins	0	1	116	80	197	192	266	305	355	735	478
08055010	lemons	0	0	0	0	0	0	0	0	235	452	441
		0	1	124	100	175	276	382	306	425	325	320

Source: TradeMap (2020)

Table 5 shows South Africa's agricultural imports from BRIC countries from 2008 to 2019. It can be noted that South Africa is a net importer of rice and wheat since the country does not produce enough for the local demand. The value of imports of rice grew by 90% between 2009 and 2019, and the rest have also increased by significant proportions. The value of frozen chicken pieces has grown tremendously, thus increasing tariffs against bone-in portions products, especially from Brazil. South Africa imports the largest share of frozen chicken from Brazil, making it the supplier of 40% of South Africa's world value in imports, and 100% of the share from BRIC countries. Some 95% of the value of rice was imported from India, followed by China. Russia provided 99% of the value of wheat imports from BRIC, while making up 24% of South Africa's global imports.

Table 5: South Africa's agricultural imports from BRIC countries

HS code	Product des											
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
10063000	Milled rice	773	227	811	3266	3616	1563	1747	1670	1617	1743	1469
10019900	Wheat	0	0	0	921	1224	2734	2538	1923	1277	2300	1395
02071210	Deboned chicken	12	279	433	485	581	601	656	685	1327	856	1112
05040010	Animals parts	318	325	361	391	392	432	588	557	746	898	979
20097900	Apple juice	255	227	288	354	554	329	368	605	585	604	756
02071493	chicken quarters	0	0	0	0	0	0	228	187	907	1451	512
35040000	Peptones etc.	171	201	158	244	365	408	445	425	359	431	439
02071411	chicken breast	0	0	0	0	0	0	275	238	387	340	293

Source: ITC, 2020

South Africa's export potential in BRIC countries

The International Trade Centre (ITC) assesses the export potential of any country of interest, based on the demand, ease of trade, and existing trade agreements. Table 6 shows the value of South Africa's export potential across different sub-sectors within the agricultural sector. It can be noted that China holds the largest potential across all sub-sectors, as compared with the other countries. The largest untapped potential in China seems to be in horticulture (worth US\$388.8 million), specifically fruits and nuts. Processed foods are also a potential avenue that South Africa is still not competitive in, despite the fact that the sub-sector represents a very high untapped potential for all the BRIC member countries. These industries need investment to build processing capacity and grow production. Alcoholic beverages also hold potential export value for South Africa. BRIC countries produce many cereals and cereal products, as these relate to food security. Therefore, there is a lower potential for South Africa to tap into those markets, also taking into account the fact that China and India's staple foods are rice, which South Africa is not producing. South Africa could capitalise on maize exports, as the country produces enough for local consumption.

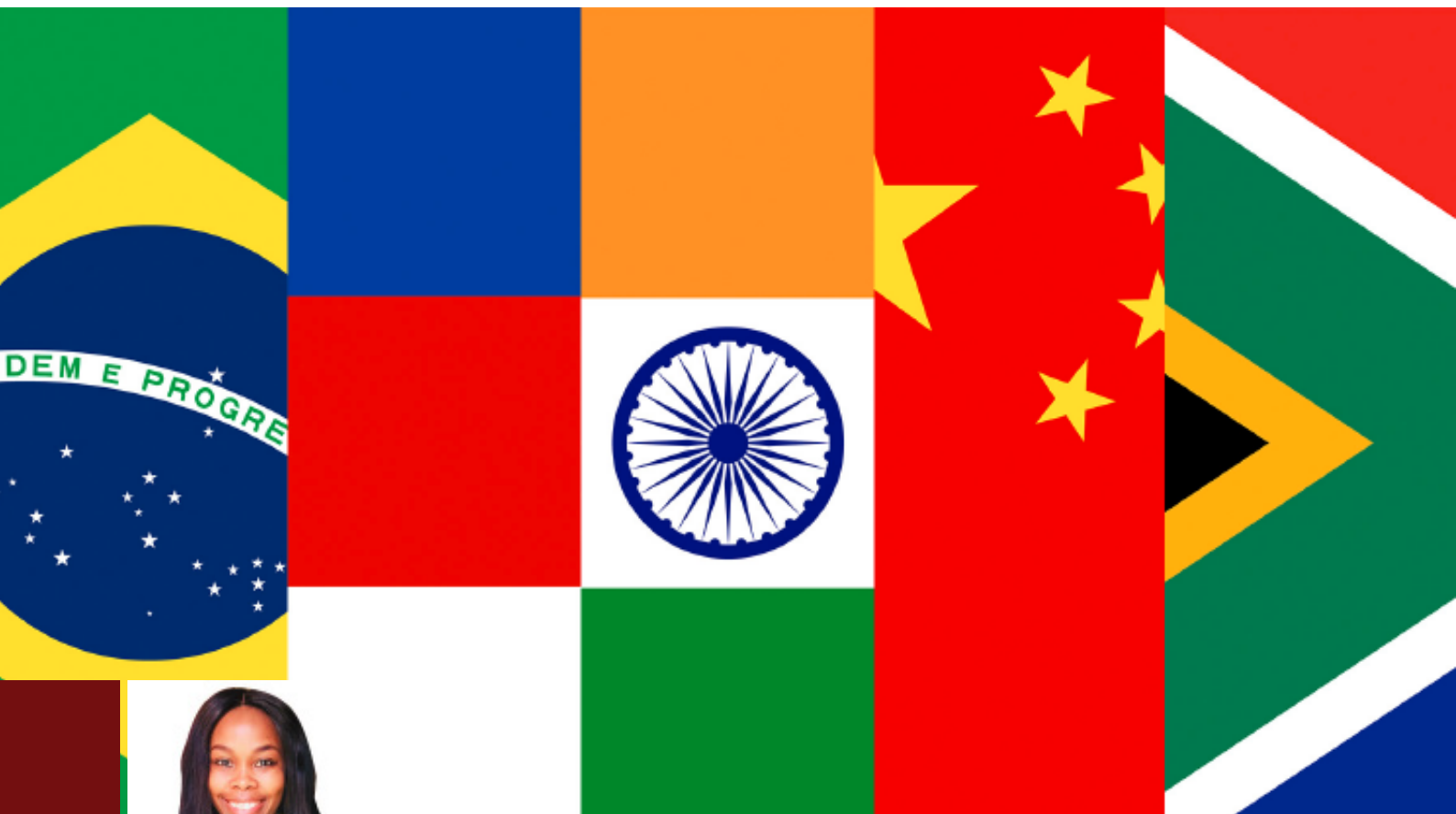
Table 6: South Africa's export potential to BRIC countries

	Export potential (million)	Actual exports (million)	Untapped potential (million)
Horticulture			
Brazil	\$23.1	\$2.5	\$21.2
Russia	\$217.0	\$183.1	\$44.9
India	\$78.7	\$24.9	\$61.4
China	\$618.8m	\$233.3	\$388.8
Animal products			
Brazil	\$1.2	\$541.7 k	\$976.8 k
Russia	\$5.7	\$38.5 k	\$5.7
India	\$380.1 k	\$144.1 k	\$365.5 k
China	\$72.5	\$22.9	\$53.1
Beverages			
Brazil	\$29.9	\$6.0	\$26.2
Russia	\$22.5	\$25.7	\$8.1
India	\$7.2	\$2.0	\$5.9
China	\$227.8	\$37.8	\$190.5
Cereals and cereal products			
Brazil	\$1.3	\$8.9 k	\$1.3
Russia	\$958.4 k	\$1.1	\$886.0 k
India	\$1.7	\$3.2	\$960.8 k
China	\$28.2	\$1.1	\$27.0
Processed food and animal feed			
Brazil	\$8.3	\$359.0 k	\$7.9
Russia	\$15.7	\$13.7	\$12.2
India	\$8.0	\$6.5	\$7.0
China	\$234.0	\$38.2	\$200.3

Source: ITC, 2020

Conclusion

The data shows that South Africa is a net importer of agricultural products from BRIC countries. This might be in line with the size of its production, compared with the rest of the member countries. Although South Africa has gained market access into BRIC countries, these countries have also gained market access into South Africa, which has resulted in large imports, such as frozen chicken, that have adversely affected the local industry. Trade agreements must be negotiated so as to benefit local producers in the country through becoming self-sufficient, while growing internationally. Trade relationships should be reviewed in cases where the local industries are at risk of being destroyed. South Africa still has the potential to expand into these markets; however, the expansion of domestic production levels will need to increase to meet local demand, as well as global demand. Fruits are high-value and high-demand products and South Africa is well positioned to supply good-quality fruit to global markets. More investment in infrastructure, research and technology is required in order for South Africa to move forward, and it should learn lessons from how Brazil turned its agricultural sector around through innovation and research.



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The World Citrus Organisation: Could the South African Citrus Industry benefit from this initiative?

By Kayaletu Sotsha

The Citrus Growers Association (CGA) initiated the formation of the World Citrus Organisation (WCO) in collaboration with Spain. On 5 November 2020, the WCO hosted a Global Citrus Congress to deliberate upon production and marketing trends, and facilitate cooperation between suppliers and retailers to add value to the citrus category. Other areas of interest included new technologies and supply chain innovation to help citrus producers and marketers to respond to consumer demands towards increased sustainability, and harnessing the nutritional power of citrus to develop more effective marketing campaigns. The event was hosted virtually and attracted over 1300 delegates from 60 countries. The CGA is hopeful that this initiative will provide South Africa with a platform to engage directly with growers, worldwide, on matters of common interest. The Chief Executive Officer (CEO) of the CGA, Justin Chadwick, is co-chairing the WCO.

South Africa's Citrus industry is export-oriented and therefore, one of the earners of foreign exchange. The industry is certainly emerging as one of the resilient industries in the South African agriculture, given the challenges that it has faced over the past five years, including drought and Covid-19, and it is maintaining a growing trend. Figure 3 shows how South Africa's citrus industry is performing in terms of production, as compared with the rest of the world. The world production of oranges has fluctuated over the past five years, whereas South Africa's production has been steadily rising, reaching a high point in 2017/18, where it has since flattened until 2019/20. Production of grapefruit, lemons and limes has also grown faster than the world's production. The same could be said about the mandarin production between the 2016/17 and 2017/18 seasons.

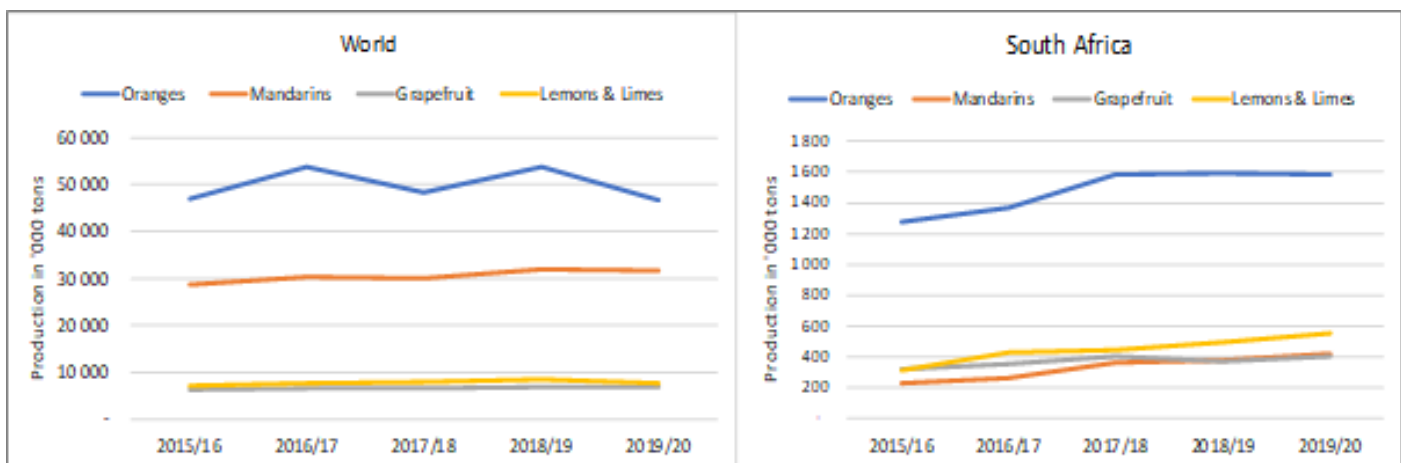


Figure 3: Comparison of South Africa's citrus production to the world

Source: CGA, 2020

Over the five years between 2015/16 and 2019/20, South Africa's contribution towards orange production to the world grew from 1 275 tons to 1 580 tons. The production of lemons and limes grew by 247 tons, from 308 tons to 555 tons, over the same period – the only types of citrus to record growth rates larger than 1%. This is notable in **Figure 3**, where the production of lemons and limes has generally maintained an upward trajectory. **Figure 4** shows the value of exports in US Dollars. South Africa's value of citrus exports has mirrored that of the world over the five years between 2015 and 2019. However, the trend for South Africa was not as responsive as that of the world, as measured by the rate of increase from 2015 to 2018 and the rate of decline from 2018 to 2019.

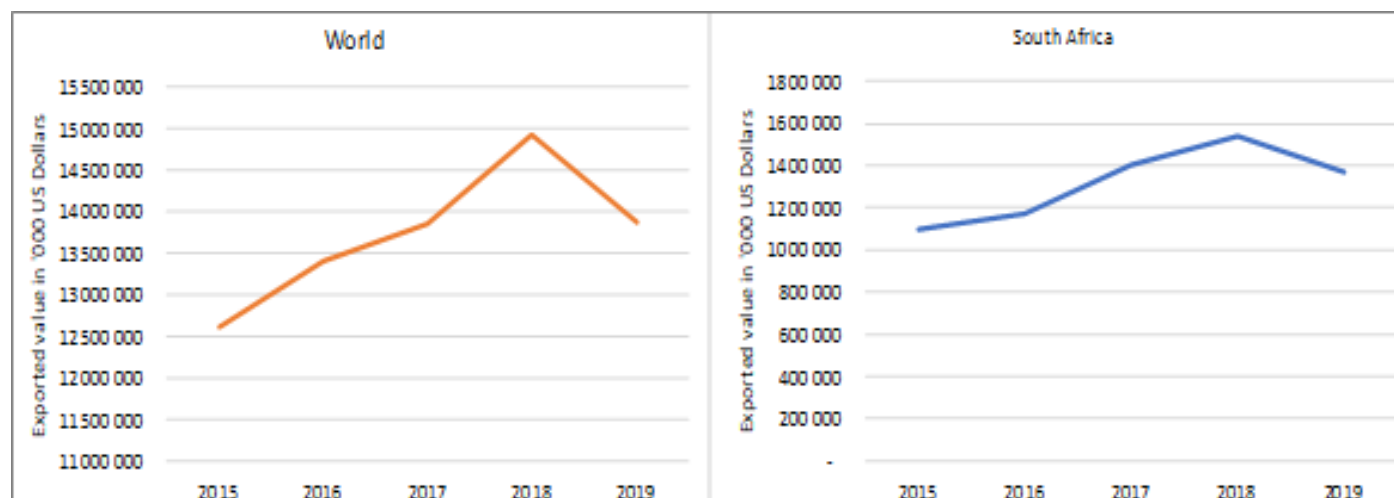


Figure 4: Comparison of South Africa's citrus export value to the world

Source: TradeMap

Table 7 shows the export markets for South Africa's citrus. Europe, the Middle East and Asia have been the top three markets for oranges over the past five years. However, the Middle East has been replaced by Asia for the second spot since 2018. The United Kingdom (UK), Europe, Russia and America are leading markets for the soft citrus. Asia emerged to occupy the third spot since 2018. The Middle East is also showing some steady growth, following a slight slip in 2016. Europe, Asia and Russia are top markets for grapefruit. The Middle East, Europe, and the UK are leading markets for lemons. Although still a leading market, South Africa's lemon market share is declining in the Middle East. In contrast, Russia and Europe are growing markets. Overall, Europe, the UK, the Middle East, Asia and Russia are the most important markets for South Africa's citrus.

Table 7: Export markets for South Africa's citrus

		2015	2016	2017	2018	2019
Oranges	Europe	31%	37%	37%	33%	34%
	Middle East	23%	23%	23%	19%	18%
	Asia	13%	15%	15%	25%	27%
	UK	7%	6%	6%	7%	6%
	USA/North America	5%	7%	7%	7%	6%
	Others	11%	12%	12%	9%	9%
Soft citrus	UK	40%	35%	32%	29%	26%
	Europe	25%	30%	26%	25%	26%
	Russia	9%	7%	10%	11%	10%
	Middle East	7%	6%	7%	8%	9%
	USA/North America	6%	10%	10%	10%	11%
	Others (*Asia 14% in 2018 and 15% in 2019)	13%	12%	15%	17%	18%

Grapefruit	Europe	27%	40%	40%	37%	41%
	Far East	26%	20%	-	-	-
	Asia	14%	15%	38%	43%	37%
	Russia	8%	10%	10%	8%	9%
	UK	7%	5%	5%	5%	5%
	Others	18%	10%	7%	7%	8%
Lemons	Middle East	40%	43%	43%	34%	37%
	Russia	14%	7%	7%	10%	10%
	Far East	13%	-	-	-	-
	Europe	15%	23%	23%	29%	28%
	Asia	6%	13%	13%	12%	12%
	Others (* UK 9% in 2016, 2017 & 2018 and 7% in 2019)	12%	14%	14%	15%	13%

Sources: CGA Annual Reports (2016, 2017, 2018, 2019 & 2020)

The strong growth observed in the citrus industry should be matched with vigorous efforts to open new market opportunities, while maintaining the existing ones. Therefore, South Africa may benefit from the WCO if the platform eases the undertaking of bilateral engagements in the global citrus markets while stimulating the adoption of new technologies. One of the main issues in bilateral engagements tends to be the way in which protocols are dealt with as they relate to phytosanitary requirements. In addition, South Africa's citrus industry needs to pay special attention to the compliance by the emerging citrus growers with stipulated requirements in order to maintain the country's compliance status and encourage market-led growth in the emerging citrus production sector. Among other factors, the importance of technology and research and development was raised during the Global Citrus Congress as being significant for improving market participation in the citrus industry.



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Exploring global Market opportunities for South Africa's Barley crop

By Thabile Nkunjana

September 2020 marked the end of the 2019/20 winter-crop marketing season, and the country is expecting even larger crop quantities for several crops such as wheat, barley, oats and canola. This can be attributed to favourable weather conditions experienced during the winter months in the Western Cape Province, a key producer of major winter crops in South Africa. Based on data from South African Grain Information Services (SAGIS), the country's barley production is estimated to increase from 345 000 tons to 520 000 tons for the current marketing season, representing an increase of 46% on a year-on-year basis.

Under current circumstances, this is great news for barley producers, given that the Covid-19 pandemic has severely affected the normal trade in barley. One major effect was the ban on sales of alcohol for a couple of months, which negatively affected the domestic use of barley. The averaged use of barley for alcohol production is estimated at 339 229 tons per annum between the 2009/10 and 2018/19 seasons. Additionally, the estimated significant increase in production for the 2020/21 production year means that there will be more barley available for domestic consumption, and not all of it will be

absorbed domestically. This means that the country needs to look for other market opportunities to sell the surplus. This article focuses on the issue of where barley market opportunities could be explored, globally.

South Africa's barley trade within the region

Figure 5 presents countries that imported barley from South Africa between 2011 and 2019. As is the case with many grains exported from South Africa, barley's main export markets are within Africa. As observed from **Figure 5**, Namibia, Zambia and Lesotho have been consistent markets for South Africa's barley over this period, with them importing 263 tons, 261 tons and 30 tons in 2019, respectively. However, a significant shift from the regular markets has been observed in recent years, during which Uganda became the largest export market, with 300 tons of barley exported in 2018, while 1496 tons were exported during 2019. So far, the 2020 data from the International Trade Centre (ITC) shows that by Uganda leads, with 704 tons of barley imported, as of September 2020, followed by Zambia (175.6 tons), Namibia (81.24 tons) and Lesotho (30.33 tons).

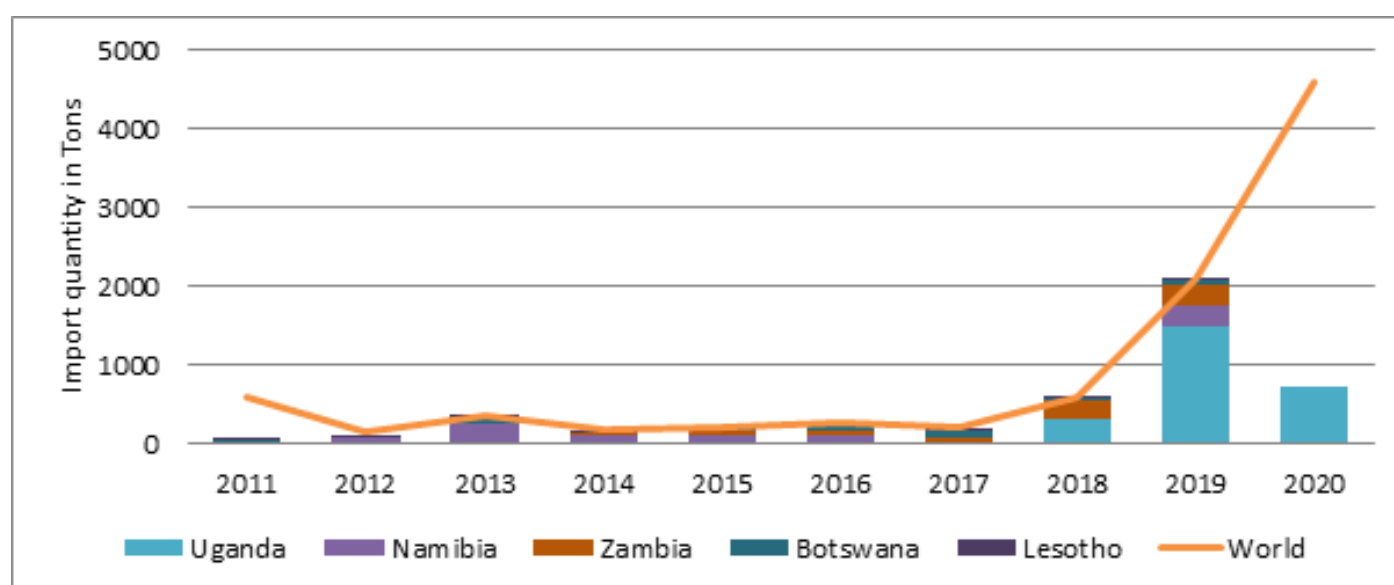


Figure 5: Leading importing countries for SA's barley
Source: ITC (2020)

Global markets at a glance

Table 8 presents the top 10 barley-importing countries between the years 2010 and 2019, by quantity, global value share of the world markets, and growth rate. These are barley-importing countries that South Africa may explore for taking up the surplus produced during the 2020/21 season. China is a leading barley importer in the world, with a global share value of 22.9% in 2019, followed by Iran (8.4%), Saudi Arabia (8%), the Netherlands (6.7%), Belgium (6.5%), Germany (4.7%) and Spain (4.2%). Japan, Jordan and Brazil have the lowest global value shares among the top ten barley-importing countries, globally, at 3.4%, 3.1% and 2.8%, respectively. During this period, Iran has been the fastest-growing market, growing at a rate of 699,1%, followed by Jordan (271,9%), China (150,5%), Brazil (126,9%) and Spain (34,3%). Despite Saudi Arabia representing the third-largest share of the global market (by value), its market share has declined by 67,4%. Other markets that registered declines over this period include Japan (19,1%) and Germany (4,2%).

Table 8: Global barley leading importing countries

Importing country	Imports quantities (tons) between 2010 & 2019		Share in value in %	Growth Rate %
	2010	2019	2019	2010-2019
China	2 367 156	5 928 780	22.9	150,5
Iran, Islamic Rep.	371 979	2 972 552	8.4	699,1
Saudi Arabia	7 206 330	2 350 159	8	-67,4
The Netherlands	2 014 213	2 156 477	6.7	7,06
Belgium	1 905 291	2 010 111	6.5	5,5
Germany	1 312 710	1 257 360	4.2	-4,2
Spain	918 453	1 233 031	3.4	34,3
Japan	1 418 206	1 147 828	4.7	-19,1
Jordan	231 303	860 236	3.1	271,9
Brazil	295 805	671 337	2.8	126,9

Source: ITC (2020)

Table 9 presents the top 10 global exporters of barley. In value terms, France has the largest share, recorded at 22.3% in 2019, followed by Russia, Australia, Argentina and Canada at 11.2%, 10.7%, 10.6% and 7.8%, respectively. Data from the ITC shows that Argentina significantly increased its exports between 2010 and 2019, at a growth rate of 486,4%. Argentina is followed by Estonia (390,5%), Kazakhstan (339,3%), Russia (156,2%) and the UK (72.8%). Of the top 10 global leading exporters, the growth rates for Denmark, Australia and Germany declined by 30.5%, 27.1% and 10.6%, respectively. These are the countries South Africa will be competing against for specific markets across the globe.

Table 9: Global barley leading exporting countries

Exporting country	Imports quantities (tons) between 2010 & 2019		Share in value in %	Growth Rate %
	2010	2019	2019	2010-2019
France	5 708 097	7 171 448	22.3	25,6
Russia	1 534 097	3 930 901	11.2	156,2
Argentina	535 794	3 141 710	10.6	486,4
Australia	3 953 991	2 881 134	10.7	-27,1
Canada	1 348 609	2 225 546	7.8	65,0
United Kingdom	1 036 458	1 791 725	5.3	72,8
Kazakhstan	373 313	1 640 082	4.4	339,3
Germany	1 763 410	1 576 903	4.6	-10,6
Denmark	755171	522 418	1.7	-30,5
Estonia	73 929	362 656	1	390,5

Source: ITC (2020)

Tariff rates play a crucial role in determining whether a market is worth the risk or not. A country might have the largest world value share and a rapidly expanding market, but, higher tariff rates might be a problem. Table 10 presents the custom tariffs applied to barley exported by South Africa for the selected countries. Under the SADC-EPA preferential trade arrangement, barley exported to Europe from South Africa is duty-free, meaning a 0% tariff rate is applied, and this applies to countries such as the Netherlands, Belgium, Germany, and Spain. Other countries where a 0% tariff is applied for South Africa's barley exports are Saudi Arabia, which is a prominent trading partner for South Africa, and Jordan, both of which are in the Middle East. Noteworthy, Saudi Arabia's barley imports have significantly declined, by 67,4%, meaning that Saudi Arabia as a market is quickly shrinking. For Iran and Brazil, 5% and 10% tariffs are applied, respectively. Of the top 10 importing countries, Japan imposes the highest tariff rate (174.73%) on South Africa's barley exports. Even if this were not the case, Japan as a market has been declining significantly, as seen in Table 5 above. Therefore, it would not be wise to look at it as a potential market.

Table 10: Customs tariffs on barley exported by South Africa

Importing country	Tariff Applied	Tariff Description
The Netherlands	0%	Preferential tariff for South Africa
Belgium	0%	Preferential tariff for South Africa
Germany	0%	Preferential tariff for South Africa
Spain	0%	Preferential tariff for South Africa
Saudi Arabia	0%	MFN Duties
Jordan	0%	MFN Duties
China	3%	MFN Duties
Iran, Islamic Republic	5%	General tariff
Brazil	10%	MFN Duties
Japan	174.73%	MFN Duties

Source: ITC (2020)

Concluding remarks

The competitiveness of South Africa, as against the leading suppliers for barley in all these markets, would be essential. Perhaps China, which is the largest world market, would prove a better market opportunity for expanding South African barley exports, as only a 3% tariff rate is applied. This might prove a better option for several reasons, also taking into account the fact that the two countries already have a well-established trade relationship for grains, especially maize. China, for example, is normally supplied by Australia, to a larger extent. Nonetheless, the situation after the COVID-19 outbreak, which resulted in China significantly increasing tariffs for several products from Australia, including barley, this might provide some room for South Africa's barley. Furthermore, according to the World Grain Organisation (WGO), France, another significant supplier for China, has battled with bad weather conditions, which will potentially affect its export volumes, based on the data from the United States Department of Agriculture.



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Trade profile of 'other sugar' (HS 1701)

By Pamela Matyolo

Sugar is one of the major products produced commercially in many parts of the world. Sugars are derived from two main plants, sugar cane and sugar beet. Sugar cane is the most-planted crop, accounting for about 80% of the world's sugar production, and it is grown in many less-developed countries. The remaining 20% of sugar is derived from sugar beet, which is largely produced among the European Union countries. Sugar is extensively traded, with annual trade making up 26% of the world annual production. In 2020, approximately 110 countries processed sugar from either sugar cane or sugar beet, while eight countries produced sugar from both cane and beet. Sugar production, globally, is dominated by India, Brazil, Thailand, the US, Mexico, Russia, Pakistan, France and Australia, all accounting for almost 70% of the world's output. In South Africa, sugar is produced in two provinces, KwaZulu-Natal and Mpumalanga, which produced about 20 million tons of sugar from 14-mil supply area. Although some policies have been put in place to protect the sugar industry, the global sugar trade is affected by increases of tariffs.

Global trade analysis of sugar

Figure 6 illustrates the top ten leading importers of sugar, between January and October 2020, in the world. During the period under review, the Republic of Korea was the leading supplier of sugar to the world, with a value ranging from US\$ 62 160 million to US\$ 38 028 million, followed by Georgia, Norway and Madagascar, ranging from US\$ 1 774 thousand to US\$ 7 480 thousand, US\$ 4 677 thousand to US\$ 7 100 thousand, and US\$ 5 693 million to US\$ 6 276 million, respectively.

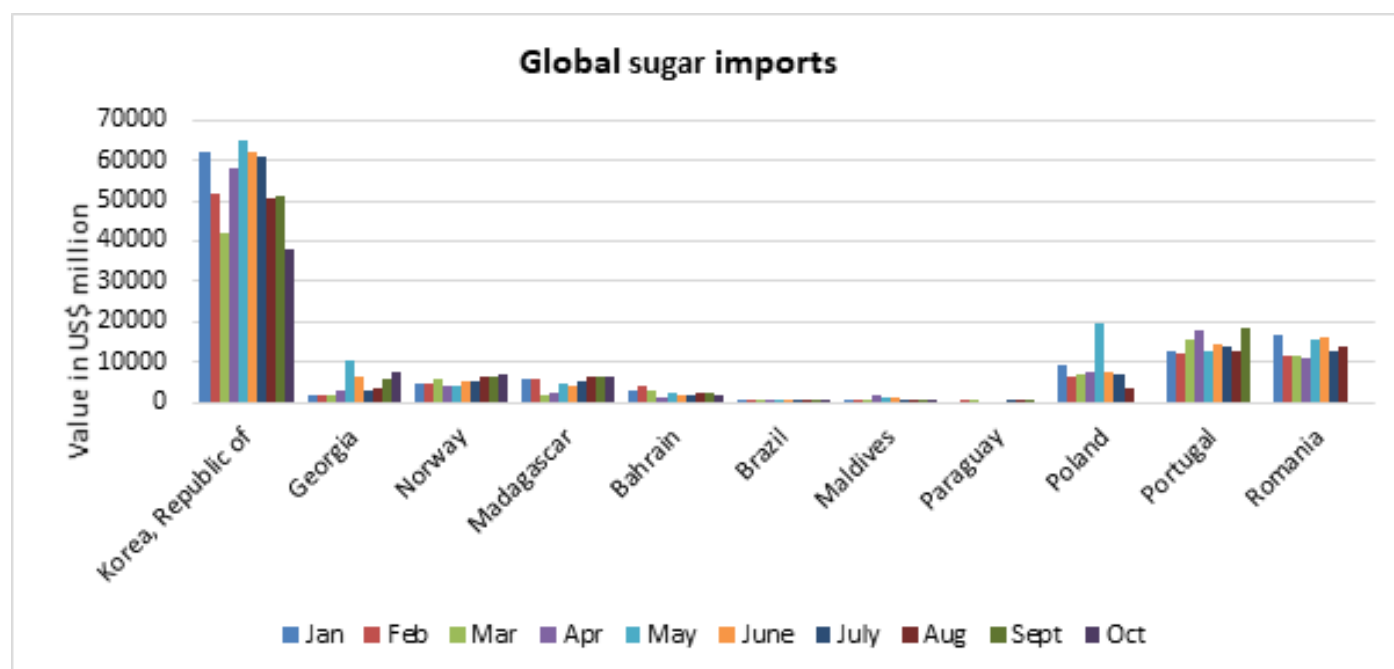


Figure 6: World top ten leading importers of sugar, Jan–Oct 2020

Source: ITC (2020)

Meanwhile, on the side of exporters, there was a significant decline in world exports between January and October 2020. As shown in **Figure 7** below, during the period under investigation, Brazil was the largest supplier of sugar to the world, with exports ranging between US\$ 470 736 million and US\$ 1 202 156 million, followed by the Republic of Korea, from US\$ 8 591 million to US\$ 12 869 million, and by Paraguay and Madagascar, with exports ranging from US\$ 6 178 thousand to US\$ 28 79 thousand, and US\$ 6 725 348 thousand to US\$ 10 20 thousand, respectively.

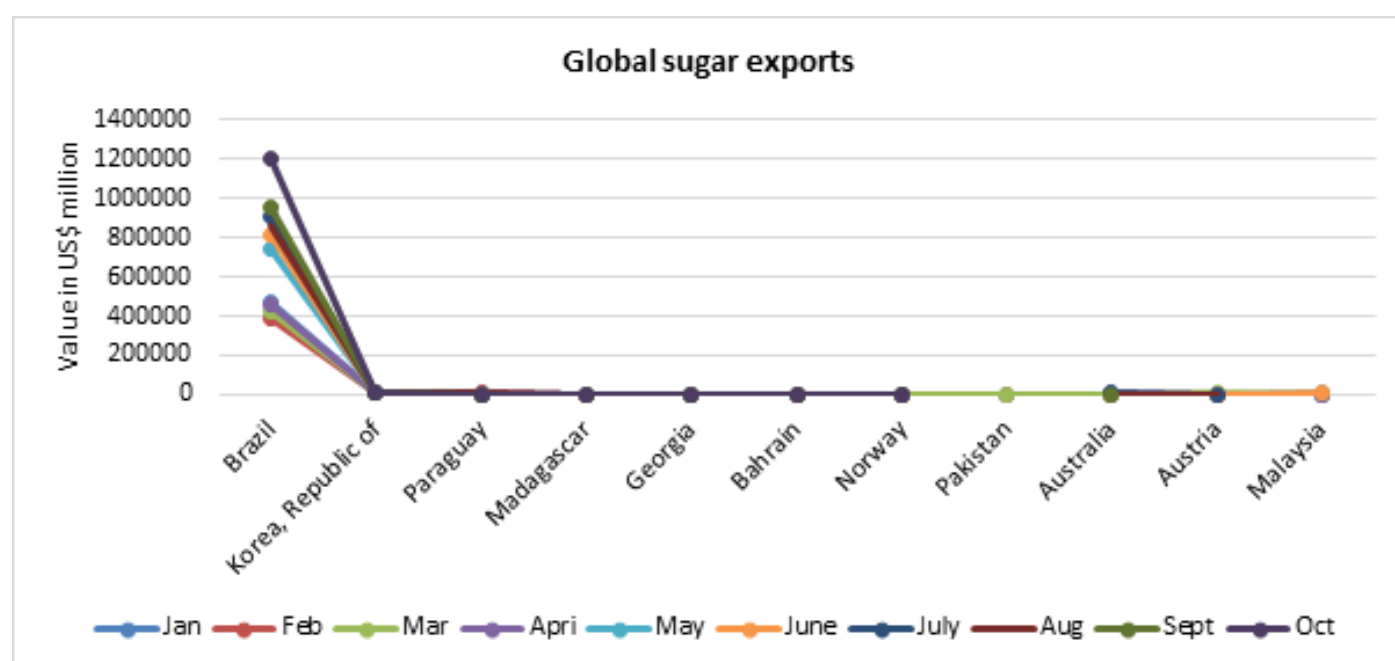
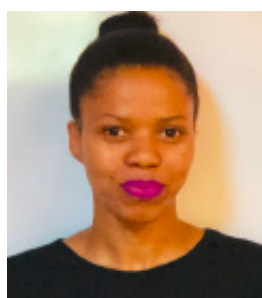


Figure 7: World top ten leading exporters of sugar, Jan–Oct 2020

Source: ITC (2020)

Trade analysis of South Africa's exports and imports of sugar

South Africa's total exports of sugar amounted to R7107,19 million in 2019, which constituted a 54% increase as compared with the previous years from 2014. Table 11 below shows importers of sugar from South Africa in terms of values between 2014 and 2019. Malaysia is the leading importer of sugar from South Africa, accounting for a 36% share, followed by Mozambique, Namibia, and the United Kingdom, with shares of 13,5%, 9,9% and 7,6%, respectively, in 2019.



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Table 11: South Africa's exports of sugar between 2014 and 2019

	Value R_ million		
Importers	2014	2019	% share
World	4590,70	7107,19	100
Malaysia	101,79	2560,16	36
Mozambique	681,67	956,37	13,5
Namibia	588,34	703,91	9,9
United Kingdom	0,49	539,64	7,6
India	0,00	442,12	6,2
Botswana	444,39	418,22	5,9
Italy	1,61	317,42	4,5
China	0,00	276,54	3,9
United States of America	281,40	217,84	3,1
Spain	0,00	167,43	2,4

Source: ITC, 2020

Table 12 illustrates the countries that supplied South Africa with sugar between 2014 and 2019. As shown in **Table 12**, South Africa sources sugar mostly from African countries, and this may be due to the African Continental Free Trade Agreement. The country's imports amounted to R 4376,27 million in 2019, which makes an increase of 49% compared with the previous years. In 2019, Eswatini was the leading supplier of sugar to South Africa, with a share of 81,9%, followed by Zambia, India, and Brazil with shares of 2,6%, 4,1%, and 3,8%, respectively.

Table 12: South Africa's imports of sugar between 2014 and 2019

	Value R_ million		
Exporter	2014	2019	% share
World	2933,77	4376,27	100
Eswatini	1944,88	3586,08	81,9
Zambia	0,00	177,54	4,1
India	37,19	166,55	3,8
Brazil	747,92	113,17	2,6
Malawi	0,00	71,57	1,6
Zimbabwe	0,01	70,25	1,6
Area Nes	0,00	65,45	1,5
Thailand	37,56	27,28	0,6
France	0,14	25,82	0,6
Mauritius	0,59	21,59	0,5

Source: ITC (2020)

Concluding remarks

Sugar is one of the major crops in South Africa and is a staple for many households. South Africa is a net importer of sugar, and this implies that there is a need for increasing sugar production in the country. The increase in the sugar tariff experienced during September this year has had a negative impact on the competitiveness of the sugar industry in South Africa.

Technical Regulation Key In Supporting Local Manufacturing



Technical regulation is key to supporting local manufacturing. This was the message that came out clearly in the webinar on technical regulations that are essential for local producers who manufacture products for the domestic and international markets. According to Makube, standards, measurements, certifications and other aspects that require regulation are also key in promoting locally produced products and their market access. He said there was a need to identify gaps in technical regulations and as to how, through their correct application, the population and the economy could be protected from harmful goods. “In South Africa, there is an influx of illicit products, many of them being clothing and food products. We regularly confiscate consignments of fake products and goods, and we are also seeing an increase in the counterfeiting of pharmaceuticals sector and medication. Branded fake clothing is sold in many cities and consumers are unaware they are purchasing counterfeited and therefore illegal goods. Such malpractices kill the local manufacturing sector and the economy,” said Makube. Makube pointed out that some countries use technical regulations as a non-tariff barrier either to protect their markets or to develop their export strategies. He said South Africa could not disregard complaints that expose the country for not using its standards, nor can we ignore the role of technical regulators in protecting local markets.

Link: DTIC (<http://www.thedtic.gov.za/technical-regulation-key-in-supporting-local-manufacturing/>)

SA Government Commits to Strengthening Economic Ties with the Middle East



The South African government is committed to strengthening bilateral economic relations with the United Arab Emirates (UAE), Saudi Arabia, and the greater Middle East region to promote South African value-added goods and services. This was said by the Director of Export Promotion and Marketing responsible for the Middle East at the Department of Trade, Industry and Competition (the DTIC). According to Mphetsheni, the virtual mission allowed South African companies to interact with potential buyers and retail importers, and also provided key insights into the Middle East culture of business, in pursuance of diversifying South Africa's export basket in the region and globally. "The virtual mission also afforded potential buyers the opportunity to explore wider variety of footwear and leather products offered by South African companies. The countries' rich history of leather and footwear manufacturing, capabilities and competitive makes was also displayed," said Mphetsheni. The Executive Director of the South African Footwear and Leather Export Council (SAFLEC), Ms Nerisha Jairaj, voiced the hope that both the UAE and Saudi Arabia were inspired by South African companies and would consider the country as a new sourcing destination for footwear and leather goods. In 2019, total bilateral trade with the region was valued at R159.7 billion. The UAE accounted for R54.7 billion of this total, while Saudi Arabia accounted for R58.8. The UAE represented 34.2% of total trade, as compared with Saudi Arabia at 36.8%, highlighting the strategic nature of the relationship with both countries.

Link: DTIC <http://www.thedtic.gov.za/sa-government-commits-to-strengthening-economic-ties-with-the-middle-east/>

Progress on the release of agricultural state land allocation



The South African government has committed itself to supporting new entrants into the agricultural economy. We are also encouraged by the expression of support from several organisations that are willing to partner with government to make a success of those who have received land from the government either through restitution of land rights or land redistribution. As part of the Economic Recovery plan tabled by the president, agriculture is one of those sectors of the economy that are poised to contribute positively in job creation, food security and economic growth, particularly as we strengthen our market access for South African agricultural products globally. On 1 October 2020, we gave an update on the State land that has been released as part of the 700 000 hectares announced by President Ramaphosa in his State of the Nation Address in February 2020. In the same press briefing, we announced that the government would be advertising 529 000 ha, amounting to 894 farms across the country, for release on 15 October 2020. The advert was to run for a month, ending on 15 November 2020.

Link: DALRRD <https://www.dalrrd.gov.za/>

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