

# TRADE PROBE

ISSUE 85 | MAY 2021

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agriculture, land reform  
& rural development

Department:  
Agriculture, Land Reform and Rural Development  
REPUBLIC OF SOUTH AFRICA



NAMC

Promoting market access for South African agriculture

# FOREWORD

Welcome to the eighty-fifth (85th) issue of the Trade Probe publication produced under the Markets and Economic Research Centre (MERC) of the National Agricultural Marketing Council (NAMC). This issue aims at providing a detailed analysis of the current trade issues within South Africa and its trading partners. Over the past year, South Africa has concluded various trade protocols to expand its export footprint in the international markets.. There it is important to assess the untapped potential of South Africa's exports. Therefore, this Trade Probe Issue focus on examining the untapped potential of niche commodity value chains such as the rabbit product. The rise of South African maize in the international markets; An analysis of the South African aquaculture market and opportunities; and Opportunities making AGOA work for Africa: Untapped potential. The publication's main objective is to inform policymakers, producers, traders and other stakeholders about trending agricultural trade issues and provide information on market opportunities and potential products demanded in the local and international markets.

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# The untapped potential of niche commodity value chains: A perspective of the rabbit industry

By Moses H Lubinga

## Background

With the fast-growing global population, there is increasing pressure on natural resources as the human race works towards ensuring that the food system continues to meet the burgeoning demand. However, one of the key challenges in ensuring that all people are food secure is the reliance on a few crop and animal value chains as food sources. Moreover, in some cases, the few currently being explored are characterised by being highly commercialised, and the cost of entry for emerging value chain actors (producers, processors, traders) is also exorbitantly high, coupled with other non-monetary barriers to entry, including strict market standards.

Nevertheless, many other value chains with opportunities for food production, job creation, inclusive growth of both youth and women, and fewer barriers to entry, which possibly require less investment in land and financial resources than commercialised value chains, are accorded little or no attention. This situation has rendered such value chains to become underdeveloped and left to be underutilised. To fulfil the food demand for a growing population, it is important to find different means of food production, and rabbit meat production is one of those, given that it is a great source of protein.

If well supported, developed and well utilised, the industry presents enormous potential to the extent that it can relieve the pressure mounting on the poultry industry in a quest to produce more chicken meat. Thus, this article aims at providing insights into South Africa's rabbit industry and the export potential of rabbit meat.

## What is known about the rabbit industry?

Although commercial rabbit farming has been practised in South Africa for about a decade or so, the industry is still in its infancy with a need for further support. Rabbit meat and live rabbits are the major products produced by the industry. There are several rabbit processed meat products available, including rabbit meat pies, rabbit meatloaf and sausages. The excrement (droppings & urine) from hutches (rabbit cages) is a very good type of manure, rich in many nutrients required for crop farming. Rabbit meat has high nutritional value, although it continues to be considered for rural usage or limited to ethnic groups in some countries. Rabbit meat has a very low-calorie content per serving but with a high concentration of protein. The meat has lower cholesterol, fat and sodium as compared to other meat types.

Due to its health properties, with the World Health Organisation describing rabbit meat as the healthiest due to its high protein and low-fat content, the meat is now trending, especially in Europe and Asia. The uniqueness and high demand for rabbit meat present enormous potential for the industry's further growth if well supported. In South Africa, the domestic consumption of rabbit meat is still low but with an increasing trend due to increasing consumer awareness about its benefits.



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### South Africa's trade in rabbit meat

South Africa is a net exporter of rabbit meat, and according to Thulo (2020), about 80 % of the rabbit meat produced is exported while the other proportion (20%) is consumed domestically. Between 2016 and 2020, the value of rabbit meat exports exponentially increased from R0.249 million to R2.306 million. An increase in the volume of rabbit meat exported is one of the key drivers of the observed exponential growth. Twenty-eight (28) tons of rabbit meat were exported in 2020 as compared to only four (4) tons exported in 2016. The volume of rabbit meat exported in 2020 alone is much more than the total volume (17 tons) exported between 2016 and 2019 (Trade Map, 2021). Another contributing factor was the increase in the global prices of rabbit meat. In 2020, the price of rabbit meat was about R82,352 per ton and this was the highest price in the past five-year period. The price increase was equivalent to 119 % and 471 % compared to the 2018- and 2019-unit prices, respectively. Thirdly, South Africa's market diversification for the product was also a very strong contributing factor. Unlike in all the previous years during which rabbit meat was destined for countries within Southern Africa, including Lesotho, Botswana, Mozambique and Angola, in 2020, all the meat was exported outside of Africa. Sixty per cent (60 %) of rabbit was exported to Hong Kong while the other 40% went to Qatar (Trade Map, 2021). Despite the afore-mentioned drastic increase in the volume of rabbit meat exports, its percentage share in the country's category of similar products (meat) remained very negligible (0 %).

### How much untapped export potential exists for rabbit meat?

The global rabbit meat industry still has large untapped export potential. Germany, France, and Belgium are the top three markets with the greatest export potential, which presents South Africa's industry with an opportunity to tap into international markets while also increasing the domestic market. In Hong Kong and Qatar, where South Africa's rabbit meat has established a footprint, the untapped export potential is estimated at US\$ 180 thousand and US\$ 71 thousand, respectively. In Hong Kong, South Africa's rabbit meat is bound to face stiff competition from supplies originating/sourced from France, Belgium and Hungary, among other countries, due to the economies of scale in the volume of exports. In addition, these countries have well-developed rabbit industries, unlike South Africa. According to the International Trade Centre (ITC, 2021), France already surpassed her rabbit meat export potential in Hong Kong by slightly over US\$ 80 thousand while Belgium and Hungary exhibit US\$ 17.3 thousand and US\$ 37 thousand untapped export potential, respectively. In Qatar, rabbit meat from South Africa is bound to compete with that from France, China, Spain, Belgium, Hungary and the Netherlands. The Netherlands exhibits the highest untapped trade potential, valued at about US\$ 728 thousand, but actual exports made so far are worth US\$ 4300 only. All the other countries mentioned above (except Spain) have not yet had market access into Qatar for rabbit meat, which leaves South Africa in a better position to further affirm its footprint in Qatar before the afore-mentioned global competitors gain access into the market.

## Conclusion

The rabbit industry is still underdeveloped and underutilised despite its potential in contributing towards food security, job creation, and poverty alleviation with less financial and land investment if compared with the requirements to establish any of the existing commercialised agricultural value chains. Notwithstanding the challenges faced by producers and exporters in the industry, a drastic increase in the volume and value of rabbit meat exports has been recorded in the recent past. Moreover, individual export firms have diversified into better paying new markets in Asia and the Middle East, unlike the traditional markets within Southern Africa. Based on the untapped export potential in the new markets (Hong Kong and Qatar), it is commendable that exporters of rabbit meat consider expanding their footprint in Qatar before other key global suppliers (e.g., France, China, ...) of rabbit meat gain access into this market. South Africa should also explore gaining access into other countries in Eastern and Western Asia (e.g., Oman, Saudi Arabia). Europe is to a great extent dominated by suppliers within the European Union, which makes it harder to penetrate this market, unlike other countries' markets. There is also a need to further support the emerging rabbit meat industry in South Africa.



# The rise of South African maize in the international markets

By Ms Fezeka Matebeni

## The state of global maize production

Maize is one of the most important food crops in the world and, together with rice and wheat, provides at least 30 % of the food calories to more than 4.5 billion people in 94 developing countries (Shiferaw et al., 2011). The role of maize for human consumption, expressed in terms of the share of calories from all staple cereals, varies significantly across regions. Maize is also a key ingredient in animal feed and is used extensively in industrial products, including biofuels. Maize is currently produced on nearly 100 million hectares in 125 developing countries and is among the three most widely grown crops in 75 countries (FAOSTAT, 2010).

The latest global production estimates indicates that the current harvest will reach a record high of 1 192.3 million tons. Even country's like South Africa is expecting a bumper harvest on maize underpinned by good weather. Internationally, countries such as USA, Brazil, China, Ukraine and Argentina are expecting good harvest (USDA, 2021). The positive world maize production growth is fuelled by good yields with a global average measured at 179.5 bushels per acre. The good yields are underpinned by generally good weather in many regions producing maize. **Table 1** shows that state of maize production in the world.

**Table 1:** Supply and demand of maize (million tons)

World	Opening stocks	Production	Imports	Total supply
2019/20 est.	326.2	1,124.8	174.2	1,451.0
2020/21 f'cast	296.8	1,140.1	185.3	1,436.8
2021/22 proj.	271.2	1,192.3	183.9	1,463.5
	(268.2)	(1192.6)	(186.8)	(1460.9)

Source: IGC (2021)

**Table 2** shows maize consumption around the globe. The actual human (food) consumption of maize is somewhat lower than the figures for industrial and feed usage, which could be due to waste from the milling, by removing some of the outer layers of bran, which is generally used as animal feed. Maize is a staple in the African continent, where the consumption ranges from 52 to 328 g/person/day and the continent of the Americas where the highest consumption has been 267 g/person/day in countries such as Mexico. Of the total 1199.3 million tons produced in 2021/2022 season, the animal feed will account for 716.9 million tons, followed by industrial and food use at 307.7 and 132.4 million tons, respectively



**Table 2:** World consumption of maize

World	Use (million tons)					
	Food		Industrial		Feed	Total
2019/20	129.2		293.4		692.2	1,154.2
2020/21	131.1		299.5		695.7	1,165.6
2021/22	132.4		307.7		716.9	1,199.3

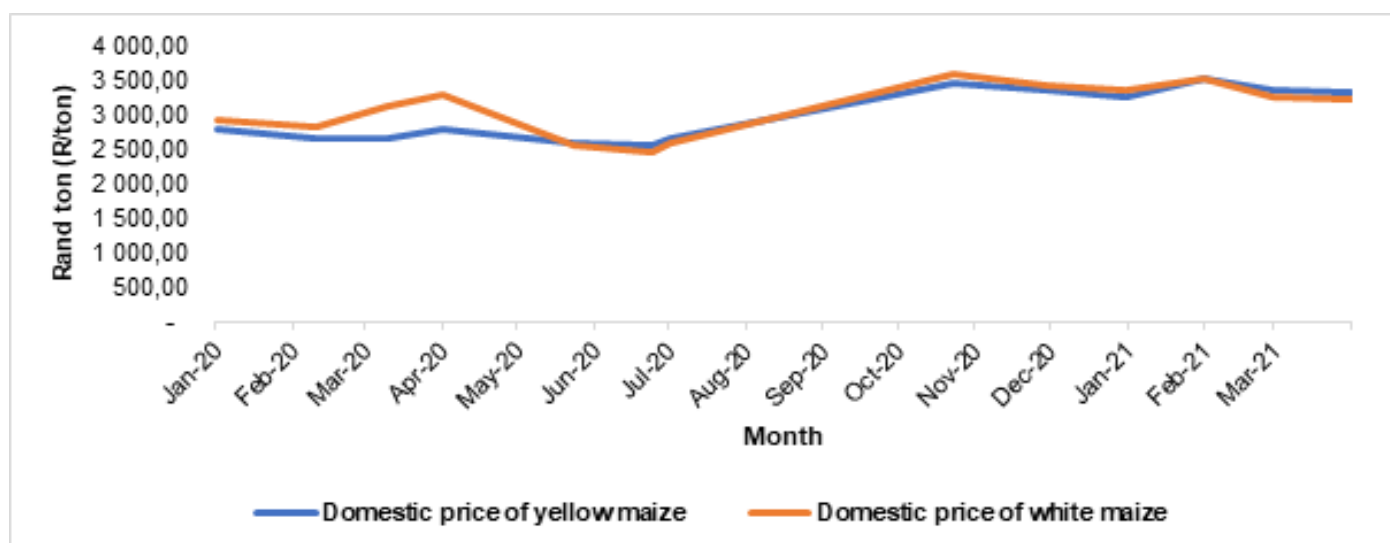
Source: IGC (2021)

**South African maize status quo**

The Crop Estimates Committee (CEC), (NAMC, 2021) reported that the South African maize will improve to 17.6 million tons which is larger than the previous season. The latest estimates released in June 2021, is 1% higher than the previous crop estimates reported in April 2021. The country is set to hit another bumper harvest at the back of good weather and increased area under plantation.

In terms of maize price, the producer price of yellow and white maize for March 2021 was R3 323/ton and R3 222/ton, respectively, compared with R3 128/ton and R2 658/ton, respectively, for March 2020 (SAFEX, 2021). The increase in prices can be attributed to the increased international maize prices due to higher demand, especially from China.





**Figure 1:** South African maize prices

Source: SAFEX (2021)

Africa's largest maize producer is once again set to regain its status as a net exporter of maize. Maize is the largest locally produced field crop and the most important source of carbohydrates in the SADC region for animal and human consumption. The increasing maize production in South Africa has enabled the country to increase its exports to the region (e.g. SADC) and into new markets in Asia. The increasing demand for maize in Asian countries such as China is expanding the South Africa maize footprint.

## Conclusion

Maize is an important crop that provides nutritional value for both humans and animals across the globe. The constantly growing demand internationally is opening new market opportunities for South Africa and other maize producing countries in the region. In South Africa, maize is a staple food that constitutes a large weight in the food basket and it is important that government increased its support to the industry to expand production.

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# An analysis of the South African aquaculture market and opportunities

By Thabile Nkunjana

Broadly, aquaculture is the farming of aquatic animals such as finfish, crustaceans and molluscs, to mention a few, and aquatic plants using or within freshwater, seawater, brackish and inland saline water. Nonetheless, the scope of this article will be limited to aquatic animals, largely tilapia. From a global perspective, aquaculture production has rapidly increased over the past 28 years, recording an increase of more than 527 %, according to the Food and Agriculture Organization (FAO) of the United Nations. This increase is in response to a significant rise in fish consumption globally. In 2018, inland aquaculture, i.e. rivers, lakes and fish farm production, accounted for at least 62 % of the farmed food fish (FAO, 2021). About 89 % of farmed aquatic fish production between 2000 and 2018 originated from China, India, Indonesia, Vietnam, Bangladesh and Egypt.

Historically, the aquaculture industry is one of the oldest sectors in South Africa, beginning in the 1670s in the Western Cape and Eastern Cape according (FAO, n.d.). Since then, the industry grew significantly until 1990, when it stabilised, before picking up again in 2018. Griffiths et al. (2010) stated that South Africa has a relatively small aquaculture industry made up of abalone, mussels, oysters and prawns. In recent years, a rise in freshwater/brackish fish farming has also been observed, especially trout, tilapia, catfish and carp. Tilapia or saltwater tilapia has noticeably increased mainly due to its traits, including its high breeding abilities and fast growth compared to other species.

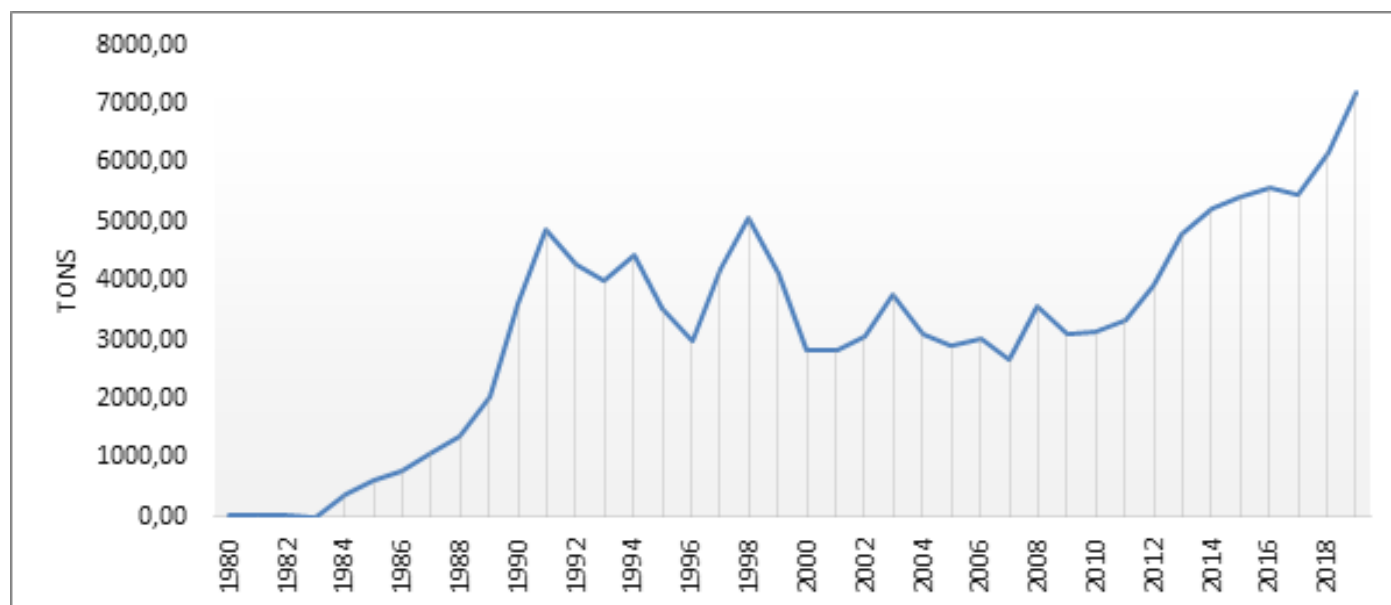
While domestic fish production has improved over time (see Figure 2), it is still overwhelmingly below the industry's full potential. The country remains a net importer for aquaculture products such as *Salmo trutta* and other as reported by the International Trade Centre (ITC, 2021) data. Part of the industry's underperformance can be linked to constraints such as limited access to water, under-technology development appropriate for specific species like trout, which constitute the largest share of freshwater production (FAO, n.d.), and high transactional costs, to mention a few.

## Domestic market at a glance

South Africa's aquaculture is generally not a big market for various reasons. Firstly, fish harvesting and/or production previously has been dominated by the coastal areas, meaning that fish consumption could have been more concentrated in these areas to a larger extent, hence the market. Secondly, most South Africans (largely black) are not fish-eating households, which might be prevalent in rural provinces. As a result, consumption is not reflected in the country's population; thus, fish farming businesses can be unsustainable if not well positioned in the market. However, this trend is increasingly shifting due to rising incomes and rising positive perceptions of fish consumption. As a result, fish production started increasing in 2018 (see **Figure 2**). Additionally, the rising population in big cities and townships is adding to this growing market.



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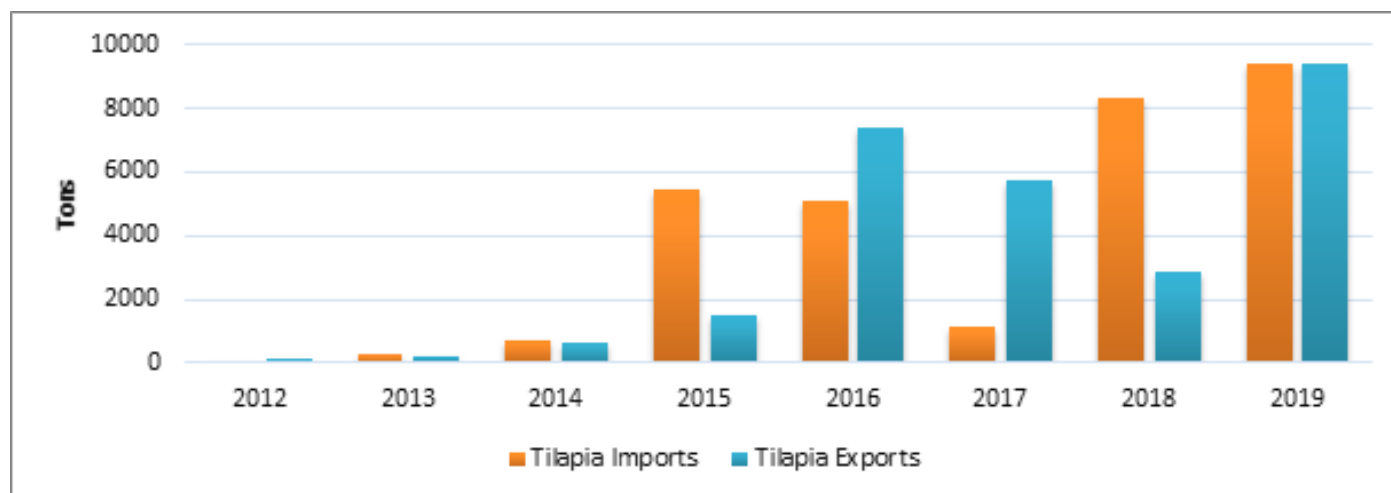


**Figure 2:** South Africa's aquaculture production  
Source: FAO (n.d.)

The Sub-Saharan Africa (SSA) region is said to be consuming much lower quantities of fish when compared to the rest of the world. The FAO states that SSA, on average, only consumed around 8.9 kg of fish per capita compared to an estimated 20.5 kg consumed across the globe in 2018.

**Figure 3** presents tilapia (030271) trade across Africa between 2012 and 2019. Even though various aquaculture species are produced across the region, this section will only focus on the trade in tilapia. A general picture is that tilapia consumption and production are significantly growing in Africa. Between 2012 and 2019, for example, imports grew by 15 561 % (from 60 tons in 2012 to 9 397 tons in 2019), while exports grew by 6 736 % (from 138 tons in 2012 to 9 435 tons in 2019). Uganda and

Namibia increased their exports by 488 % and 155 %, respectively. For imports, Rwanda increased its tilapia imports by 5 050 % (from 2 tons in 2014 to 103 tons in 2019), followed by Zambia at 41 500 % (from 20 tons in 2014 to 8 320 tons in 2019), Namibia at 292 % (from 26 tons in 2014 to 102 tons in 2019), and Malawi at 240 % (from 125 tons in 2014 to 426 tons in 2019). South Africa was the only country with data for 2020 available from ITC when this article was written. The country's tilapia exports increased by 8 950 % between 2012 and 2020, from 30 tons in 2012 to 2 715 tons in 2020. Malawi was the largest market destination for tilapia exports from South Africa, with over 2 000 tons during the 2020 marketing season, which is in line with the FAO's predictions on the rising fish demand in Africa.



**Figure 3:** Tilapia (030271) trade across Africa between African countries  
Source: Trade Map, 2021

### Concluding remarks

Globally, the total fish trade has noticeably increased over the past two decades, registering an increase of 38 % in value terms to US\$164 billion. By 2030, aquaculture production is expected to increase to 109 million tons from 26 million tons in 2018; this represents an increase of 32 % (FAO, 2021). Domestically, there is no precise data that can be used to draw a clear picture of fish consumption and production, but there are some glimpses of a positive trend. From the production point of view, it's clear from **Figure 2** that domestic fish production is rising and that exports, especially for tilapia, can be linked to this. Even though developed countries dominate global fish imports, developing countries are steadily showing an increasing trend.

Aquaculture is expected to rise by 48 % in Africa during the next decade, driven by demand and capacity-building across the region. While factors such as water might limit South Africa aquaculture production to a certain degree, and because the country is not necessarily a fish-eating country compared to other African countries, the SSA as a region presents a good opportunity for fish farmers in South Africa. Moreover, developed parts of the world such as the European Union, North America and strong fish consuming countries such as Japan continue to increase their consumption demand. For South African fish farmers to tap into this market, proper support to the local aquaculture industry is required, especially if it wants to increase its export share to the rising African market. While the sector barely makes headlines, it has the potential to create job opportunities and contribute to the country's GDP.



## Making AGOA work for Africa: Untapped potential

*By Lucius Phaleng*

The African Growth and Opportunity Act (AGOA) offers duty-free access to the largest market in the world and has the potential to be a major driving force in African development. Thus far, however, it has failed to live up to its potential. AGOA has seen numerous success stories since its commencement in 2001 – such as the growth of automotive exports from South Africa to the US – but the broader picture has been disappointing. US imports from Africa continue to be dominated by energy commodities, which account for 88 % of AGOA (excluding South Africa) exports to the US. In terms of African export competitiveness, textile commodities appears to be the most prospering export commodity from Africa. Even where the deal does grant a tariff advantage, African companies must still grapple with complex standards and rules of origin that often discourage otherwise competitive producers from exporting.

The weak performance should not only raise questions about the importance of AGOA but also serve to highlight how underutilised the preferences remain. The current legislation expires in September 2025 and, while renewal of the AGOA is yet to be determined by trading partners, it will be of interest to see if the offer of non-reciprocal access is maintained beyond the current regime. African countries and the US must seize the opportunity while it remains, maximising the untapped potential of AGOA preferences. A comprehensive strategy should involve four pillars: core renewal of AGOA; assistance in overcoming non-tariff barriers to entering the US market; infrastructure development to boost competitiveness; and planning around a rapidly evolving global trading system.

### **Addressing non-tariff barriers to trade**

The recent AGOA renewal itself is not enough. To make AGOA work, support and co-operation beyond tariffs are necessary for both the US and African

states to fully benefit from the deal. The most direct path to improving trade linkages is to address non-tariff barriers to trade, of which two are particularly important. Firstly, African companies need expanded assistance in understanding and navigating the bureaucracy involved in exporting to the US, including assistance ranging from understanding paperwork and labelling requirements to meeting difficult sanitary and phytosanitary rules. Support should be forthcoming from both the US and African countries. Secondly, rules of origin remain restrictive under AGOA. Rules of origin set minimum requirements on how much local value must be added to a product exported to the US. While AGOA uses relatively liberal rules, they remain challenging in the unique context of African economies. Least developed African countries with weak local manufacturing capacity and low labour costs (which artificially suppress the nominal value added) may struggle to qualify for duty-free access to the US market, despite substantially transforming inputs. The need for extensive paperwork proving the origin and value of inputs may encourage some exporters to avoid doing business with more informal firms. Continued efforts to build accommodative rules of origin could help give AGOA countries a fair chance at competing with other nations with preferential market access, such as those involved in the Trans-Pacific Partnership (TPP).

### **AGOA sector data: Agriculture**

The agricultural sector forms one of the most important economic activities in Africa. While much of agricultural production is subsistence based or for local consumption, there has been strong growth in agricultural products being exported globally. Africa's international agricultural exports include citrus products, grains, nuts, fish, tobacco, cocoa, coffee, beverages, sugar, vegetables, fruit and many other agriculture categories. These products can be

found on shelves in all corners of the world and are used as inputs in further processed goods. In terms of US exports, AGOA beneficiaries exported a combined US\$ 1944.7 million worth of agricultural products during 2020, lower by US\$ 25.68 million as compared to 2019 values. However, most trade continues under normal tariff relations, either because products do not qualify under AGOA/GSP or because products are already subject to low or no duties when entering the US. Leading products exported under AGOA/GSP preference are citrus fruit (mainly oranges and mandarins), grapes, nuts (including macadamias), fresh vegetables, cassava and peppers.

### Conclusion

The US' **commitment to supporting African development through trade must be applauded, but trade is about more than tariffs**. A comprehensive AGOA, working beyond preferential market access, can help the bill live up to its potential. AGOA preferences and a streamlined system of rules and regulations will assure good access to the US market, but in order to take advantage of this, African companies need a base level of structural competitiveness. Arguably, the key factor holding back improved US-Africa trade is the lack of an environment conducive to the competitive production of those goods the US wants to buy. This competitive deficit has a wide range of causes, not all of which are easy to address. The US' current programmes towards African infrastructure development should be applauded, most notably the Power Africa initiative. Power Africa strategically targets the biggest barrier to creating a predictable, productive environment in Africa: the energy deficit.



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## Market analysis for sisal (HS: 560721)

By Lindikaya Myeki

### Background

The growing calls for adopting green economy practices imply that natural fibres are highly likely to receive greater attention. Natural fibres offer the potential to deliver greater added value, sustainability and renewability, and lower costs, especially in the automotive industry, which presents an opportunity to establish and strengthen the industry value chains that have been neglected for a long time. These value chains include, amongst others, hemp and sisal. This article focuses on the market analysis for sisal - binder or baler twine, of sisal or other textile fibres of the genus agave (HS code: 560721).

### Market analysis: Binder or baler twine, of sisal or other textile fibres of the genus agave (HS Code: 560721)

Table 3 shows the top 10 global exporters of sisal in 2019, expressed in value terms and measured in thousand USD. The world value of exports was at US\$ 54 294 thousand and the leading (top 10) exporters accounted for 87 % of the market share of world exports of sisal. Topping the list was Brazil at 49.3 %, followed by Portugal at 18.1 % and Kenya at 4.8 % of the world's market share. Other countries making the list of the top 10 world exporters were the United Kingdom (US\$ 2 543 thousand), Tanzania (US\$ 1 236 thousand) and China (US\$ 1 051 thousand).

**Table 3:** World's leading exporters of sisal (HS Code 560721): 2019

Exporters	Value exported in 2019, in USD thousands	Share in world exports, %
<b>World</b>	<b>54294</b>	<b>100</b>
Brazil	26764	49.3
Portugal	9842	18.1
Kenya	2612	4.8
United Kingdom	2543	4.7
Tanzania	1236	2.3
China	1051	1.9
United States of America	881	1.6
Thailand	838	1.5
Belgium	781	1.4
Russian Federation	777	1.4

Source: Trade Map (2019)

**Table 4** presents the list of the top 10 leading importers of sisal in 2019, expressed in value terms. The world value of imports amounted to US\$ 73 572 thousand. Leading the list was the United States of America, France and the Netherlands, accounting respectively for 41.9 %, 10.1 % and 9.2 % of the world's market share. The rest of the countries forming the top 10 leading importers of sisal includes Myanmar (US\$ 3 715 thousand), Portugal (US\$ 3 166 thousand), Canada (US\$ 2 318 thousand) and others.



**Table 4:** World's leading importers of sisal (HS Code 560721): 2019

<b>Importers</b>	<b>Value imported in 2019, in USD thousands</b>	<b>Share in world imports, %</b>
<b>World</b>	<b>73572</b>	<b>100</b>
United States of America	30829	41.9
France	7462	10.1
Netherlands	6754	9.2
Myanmar	3715	5
Portugal	3166	4.3
Canada	2318	3.2
Germany	2002	2.7
Nigeria	1696	2.3
Japan	1580	2.1
Belgium	962	1.3

Source: Trade Map, 2019.

**Table 5** lists the top five leading export destinations for South African sisal in 2019, expressed in value terms and measured in thousand USD. The first observation is that South Africa exports its sisal to one African country, namely Mozambique, commanding the largest market share (60.6 %), followed by Italy (28.8 %) and China (7.6 %). Other countries on the top five list of sisal export destinations for South Africa include Areas Nes and the United States of America, with an export market share of 1.5%.

**Table 5:** Top five export markets for South Africa's Sisal (HS Code 560721): 2019

<b>Exporters</b>	<b>Imported value</b>	<b>Share in world imports, %</b>
<b>World</b>	<b>66</b>	<b>100</b>
Mozambique	40	60.6
Italy	19	28.8
China	5	7.6
Area NES	1	1.5
United States of America	1	1.5

Source: Trade Map, 2019

**Table 6** presents import markets for South Africa sisal in 2019. The first observation is that South Africa imports a large quantity of sisal (HS: 560721), which can be attributed to a wide range of relatively high local production costs and low world market prices. Botswana topped the list with a largest market share of 31.9 %, followed by Namibia (28.7 %), Zambia (20.7 %) and Eswatini (7.2 %). Other countries making the list of top 10 import markets for South African sisal were Mozambique, Lesotho, Zimbabwe, DRC, and Area NES.

**Table 6:** Top ten import markets for South African sisal (HS Code 560721): 2019

Exporters	Exported value (in USDA' million)	Share in SA's exports, %
<b>World</b>	<b>637</b>	<b>100</b>
Botswana	203	31.9
Namibia	183	28.7
Zambia	132	20.7
Eswatini	46	7.2
Ship stores and bunkers	45	7.1
Mozambique	10	1.6
Lesotho	8	1.3
Zimbabwe	4	0.6
DRC	2	0.3
Area NES	2	0.3

Source: Trade Map, 2019

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## SACU trade analysis and its potential

*By Lucius Phaleng*

The Southern African Customs Union (SACU) is a customs union with a common external tariff applicable to imports outside the common customs area irrespective of the destination. The five-member states of SACU – Botswana, Lesotho, Namibia, South Africa and Swaziland – continue to show substantial differences in levels of economic development. Botswana and South Africa are classified as upper-middle-income countries, while Namibia and Swaziland are considered lower-middle-income countries, and Lesotho is the least developed country. Nonetheless, SACU countries face common challenges, notably unemployment, income inequality, poverty, and HIV/AIDS. Since 2003, SACU economies have collectively expanded at an average annual rate of about 4 % in real terms. In some SACU countries, the growth performance has been somewhat inconsistent, mainly reflecting infrastructure constraints, electricity supply shortages, cyclical mining output, exchange rate adjustments, and the impact of the global financial crisis.

### **SACU's external trade relations**

SACU countries are members of the Southern African Development Community (SADC) and have preferential trade agreements with the European Free Trade Association (EFTA) and the Southern Common Market (MERCOSUR). Swaziland is also a member of the Common Market for Eastern and Southern Africa (COMESA). SACU countries are eligible for non-reciprocal preferential treatment under the Generalized System of Preferences (GSP) and the US African Growth and Opportunity Act (AGOA). Some SACU countries have bilateral trade agreements in place. To further harmonise trade policy, SACU members have agreed to negotiate new preferential trade agreements as a group. They are finalising negotiations on economic partnership agreements with the European Commission (EC). The SACU external trade agreement is summarised below.

- SACU has a free trade agreement (FTA), which came into force in May 2008, with the European Union Free Trade Association (EFTA) states – Norway, Switzerland, Lichtenstein and Iceland. The FTA includes bilateral side agreements between SACU and all EFTA states except Lichtenstein on agriculture.
- SACU also has a Preferential Trade Agreement with the Common Market of the South (MERCOSUR); its members are Argentina, Brazil, Paraguay and Uruguay. This agreement came into force in April 2016.
- SACU members (along with Mozambique) are parties to the Economic Partnership Agreement (EPA) with the European Union, which has been provisionally applied since October 2016. In 2017, the EU accounted for 27 % and 21 % of SACU's imports and exports from the rest of the world. Germany, the UK and Italy are the top source markets for products imported by SACU. Germany, Belgium and the UK are the top destination markets for products exported by SACU.
- SACU has a Trade, Investment and Development Cooperative Agreement with the United States (US) to foster trade, investment and development, which came into force in July 2008.
- In addition, SACU countries are currently all eligible beneficiaries of the African Growth and Opportunity Act (AGOA). AGOA is a US legislation that enhances market access for sub-Saharan African countries.
- SACU is currently negotiating an FTA with India, the African Continental Free Trade Area (AfCFTA) and the Tripartite Free Trade Area (TFTA).



## SACU's tariff profile

SACU countries have a single customs territory with no customs duties between them. They apply a common external tariff (CET) on imports from non-SACU countries. Duties applied on imports differ depending on the origin/source and type of product. SACU countries apply Most Favoured Nation (MFN) tariffs on all products coming into the customs union, except for products originating from the EU, EFTA, SADC and MERCOSUR, which are charged preferential duties following their respective trade agreements with SACU. SACU's highest MFN applied duties are levied on tobacco and clothing products. The ad valorem equivalent MFN applied tariff for unstemmed and unstripped tobacco is 142.77 %, and for stemmed and stripped tobacco, it is 111.36 %. The MFN applied tariff on clothing ranges between 40 % and 45 %, except for second-hand clothing. The same duty rates are applied to all imports of sugar and second-hand clothing regardless of their origin.

A specific duty of 213.1c/kg is applied on sugar imports and 60 % or 2500c/kg for second-hand clothing imports. The highest average MFN applied tariffs are for knitted clothes (41.3%); non-knitted clothes (40%); other clothing (28.7%); carpets (26.6%); leather products (26.4%); umbrellas (25.8%); and footwear (22.2%). In the Uruguay Round, South Africa, on behalf of SACU countries, committed itself to apply tariff quotas to a range of agricultural products, under the minimum market-access commitments, at maximum tariffs of 20 % of the bound rates. Products subject to the commitments include animal products, potatoes, vegetables, fruits, cereals, coffee, tea, oilseeds, sugar, food preparations, wine and spirits, vinegar, tobacco, and cotton. Initial quotas are expected to increase for, amongst other things, the meat of sheep, fresh milk and cream, cheese, eggs, certain cereals, potatoes and sugar.



**Table 7:** Tariff bindings in SACU, post-Uruguay Round (per cent)

Description	No. of tariff lines	Average	Maximum	Fully bound	Partially bound	Unbound
All products	7,817	20.9	597.0	96.1	0.1	3.9
HS 01 24	913	46.8	597.0	82.4	0.0	17.6
HS 25 97	6,904	18.1	185.0	97.9	0.1	2.0
WTO agriculture	846	43.5	597.0	99.5	0.0	0.5
- Animals and products thereof	96	44.8	160.0	100.0	0.0	0.0
- Dairy products	20	93.7	96.0	100.0	0.0	0.0
- Coffee and tea, cocoa, sugar etc.	178	54.0	597.0	99.4	0.0	0.6
- Cut flowers, Plants	44	10.6	60.0	100.0	0.0	0.0
- Fruit and vegetables	182	30.7	99.0	100.0	0.0	0.0
- Grains	16	30.8	72.0	100.0	0.0	0.0
- Oilseeds, fats and oils and their Products	75	49.0	81.0	100.0	0.0	0.0
- Beverages and spirits	49	145.2	597.0	100.0	0.0	0.0
- Tobacco	13	51.7	54.0	100.0	0.0	0.0
- Other agricultural products, n.e.s.	173	16.9	72.0	98.3	0.0	1.7

Source: WTO Secretariat, based on South Africa's Uruguay Round Schedule XVII.

Non-tariff barriers such as (seasonal) import quotas and prohibitions, or additional duties on imports of certain agricultural products from all countries, including other SACU members, aim to encourage domestic production of certain agricultural goods. Botswana, Lesotho, Namibia and Swaziland apply the anti-dumping, countervailing, and safeguard measures determined by South Africa, a leading initiator of anti-dumping actions among WTO members. Botswana, Lesotho, Namibia and Swaziland are in the process of establishing their own legal and institutional framework to enable them to initiate trade remedies. Some SACU countries have adopted South Africa's regimes in the areas of standards, technical regulations, and SPS measures. Some SACU countries apply export taxes (on rough diamonds by Namibia and South Africa; on sugar by Swaziland). Botswana maintains a statutory export monopoly on beef exports.

### Trade issues faced by SACU countries

- The logic of allocating customs revenue based on intra-SACU imports is technically problematic and complicated. Tariff revenue distribution is quite peculiar as it requires monitoring and keeping on intra-SACU trade, which necessitates border controls within a customs union. There has also been a problem related to the validity of intra-SACU trade data as reported by some members as a source of conflict. An increase in intra-SACU imports claimed by any member reduces the revenue share of all other members. This basis of customs revenue distribution does not help develop economic co-operation and integration within the customs union.
- South Africa is the dominant economy within the SACU region and the primary destination market for BLNS exports. Any value chains that are developed in the region will, in all likelihood, depend on access to the South African market and will be heavily influenced by the purchasing decisions of South African firms and consumers. It is, therefore, necessary to explore the extent to which firms in the BLNS are able to link into the supply chains of downstream businesses in South Africa and the main barriers to such trade. It is also important to consider the dependence of firms in the BLNS on inputs (including services) from South Africa and their ability to source inputs from elsewhere, including other preferential markets.
- The Ease of Doing Business rankings suggest that firms in SACU member

states, in general, face significant regulatory constraints that increase the time and cost of doing business. These costs make it difficult for SACU countries to compete internationally as exporters and for inward investment and may encourage the development of inward-looking businesses and value chains. The extent to which barriers in one SACU country may impede firms' growth and international competitiveness in other member states may require further consideration.

- SACU countries, with the exception of South Africa, have a narrow export base. The principal policy imperative remains diversification away from their key export products (diamonds and other minerals in Botswana and Namibia, textiles in Lesotho, and sugar in Swaziland). Some labour-intensive manufacturing activities, particularly textiles and clothing, have been seriously affected by increased competition in foreign markets.
- Services play a crucial role in the diversification of the SACU economies. Export opportunities, however, remain largely untapped by SACU (with the exception of South Africa). In tourism, for example, constraints in infrastructure, marketing and promotion, finance and lack of skilled labour have impeded the development of the subsector. Further liberalisation and investment in services should generally improve the efficiency of other economic activities and the competitiveness of SACU's exports, especially by reducing costs for telecommunications, transport and energy.

**Threats to the future existence of SACU**

- Although reference is made to its impact on the revenue pool, the international financial crisis lies in its impact on the fiscal position of South Africa. By calling for a review of the revenue sharing formula, the South African treasury is signalling its distress to the BLNS states.
- The EPA negotiations have resulted in some countries signing up to the interim agreements and South Africa trading under the TDCA and, once fully implemented, this will result in the operation of the TDCA external tariff as well as the IEPA tariff, effectively killing the SACU CET.
- The current impetus in South Africa is to change the revenue-sharing formula to a development format. While the desire to do so on the part of South Africa is understandable and is probably driven by a desire for a more equitable revenue-sharing formula, this would seriously undermine the budgets of the BLNS states.
- The push towards stronger economic relations, based on economies of scale, between South Africa and Angola as an alternative to SACU; and
- The attempts to include Angola and Mozambique in the current arrangement would further complicate the revenue sharing formula and face opposition from the BLNS states.



## South Africa has positive prospects to further export grapes, wine, oranges and nuts

*By Onele Tshitiza*



The potential for agriculture to contribute to the economic growth of developing countries is well recorded and South Africa is not an exception. Agriculture, forestry and fisheries increased by 13.1% in real GDP in 2020 compared to 2019 (StatsSA, 2020), although the overall real GDP had declined by 7% in South Africa. The increase in real GDP within agriculture can be attributed to the bumper maize and favourable export prices in the top exported horticultural products (BFAP, 2020). The growth is despite the global pandemic, although its impact on some producers is not taken lightly. When production is in excess and export market conditions are favourable, the country can maximise on existing markets as well as seek to infiltrate new ones. South Africa's horticultural industry is known for its export orientation, where in most industries, over 60% of production is exported to trading partners. This article seeks to evaluate whether there is still room for South Africa to explore new markets or increase the market share in existing ones for agricultural commodities using trade data.

The International Trade Centre (ITC) calculates the value of a country's export potential for a product into a certain market by considering supply and demand factors, as well as the bilateral easiness of trade. Supply and demand are said to be projected using GDP and population forecasts, demand

elasticities and progressive tariffs. The difference between export potential and actual exports is untapped potential, which means an opportunity to export if barriers are overcome. The tool is not without limitations and is therefore not to be isolated from other factors such as cost of export promotion and the added value that could be realised from marketing and branding, direct investment and other sector strategies. It is therefore limited to market access and trade data and more research may be needed to make well-informed decisions on whether to export or diversify. At the basic level, other factors on the domestic side might have a bigger impact, such as production which would determine the country's ability to export larger volumes, which interacts with other factors along the value chain.

According to ITC data, South Africa has the most potential to export all of its products, including agriculture to China, Germany, the United Kingdom (UK) and the United States. This may be in line with the trade relations that South Africa already has with these countries and their demand for the products that South Africa produces or the potential of products that South Africa is not yet producing. It might also be influenced by South Africa's limited infrastructure to process its raw materials such as precious stones and minerals to finished products, as well as the high labour costs to achieve the same

level of production. When all products produced by South Africa are considered, gold has the largest value of untapped potential of all, followed by motor vehicles, ferro-chromium, diamonds and so on. The focus of this article however will be on agricultural commodities. In terms of their untapped potential among all exported products, fresh grapes and fresh or dried oranges rank as 10th and 11th respectively, while apples are in the 14th spot, maize (15th), wine of fresh grapes (16th) and nuts not elsewhere specified (17th). Mining and agricultural products at their raw states therefore seem to present export opportunities for South Africa.

#### Commodities with the largest export potential

Table 8 focuses on South Africa's bilateral trade with the four countries with which South Africa has the largest potential, together with the commodities that still have room to be exported into these countries, measured in million US\$. Commodities are ranked according to their remaining untapped potential per country. The red numbers are the values of untapped potential into the four countries. The difference between the export potential and untapped potential is what South Africa's exports are currently worth. From the table, we can see that South Africa still has the potential to increase its market share in fresh and dried oranges, wine, fresh grapes, dried grapes and nuts not elsewhere specified (nes).

China has the largest untapped potential for three of the commodities. South Africa has increased its exports of oranges to China in recent years as market access through coordination between government bodies and industry has opened up. The untapped potential for South Africa in China is quite large relative to the potential export because the value of our actual exports is relatively small for all the products. This might be in relation to some barriers such as food standards and dominance of the market by other countries. Germany is also a great market to explore for the three products as we have not utilised all the potential. There is a greater potential for grapes and wine of fresh grapes in the U.S., while oranges are almost at their potential peak, with US\$8 million remaining of US\$ 43.7 million. Interesting is how we have almost utilised 50% of the potential export in the United Kingdom for wine, nuts nes and dried grapes. This shows how South Africa might be benefiting from the bilateral relations which have been built over the years with the UK. South Africa's production of maize, citrus and grapes has been increasing in the last two years and estimates reveal that we can expect an increase in these commodities this season. In the long-term, as production improves, new markets and an increase in existing markets is going to be vital for industries to diversify their markets.



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**Table 8:** Countries that South Africa has untapped export potential with and its products.

Markets	Commodities	Potential export and untapped potential remaining (in million US\$)
China	Fresh or dried oranges	194.9 105.8
	Wine of fresh grapes	124.8 95.5
	Fresh grapes	110.6 91.0
Germany	Fresh or dried oranges	115.9 93.4
	Nuts not elsewhere specified (nes.)	102.6 86.1
	Fresh grapes	154.6 78.8
United States	Fresh grapes	71.9 69.8
	Wine of fresh grapes	102.1 60.6
	Fresh or dried oranges	43.7 8.0
United Kingdom	Wine of fresh grapes	91.7 44.5
	Nuts nes.	14.6 7.6
		14.5 7.1

Source: ITC (2021)

## Conclusion

Although export potential does not give the full picture enough for countries or producers to grow the market share in existing markets and tap into new markets, it gives a starting point to further investigate the prospect of such a venture. Trade data from the ITC shows that South Africa has the potential to still realise a large value from exporting oranges, wine, grapes and wine to China, Germany, the United States and the United Kingdom. The country already has trade agreements with these countries, which makes it possible to trade with them, however further exploration is needed to assess what factors are inhibiting the country from expanding in these countries. With the growth of South Africa's production, it will become important for stakeholders to increase their market share in existing markets and also enter new markets to fully realise the value of their output. Coordination between government and private actors to meet the requirements of these markets will become important, together with holistic export promotion activities.

## AfCFTA is a key instrument in post-COVID-19 recovery



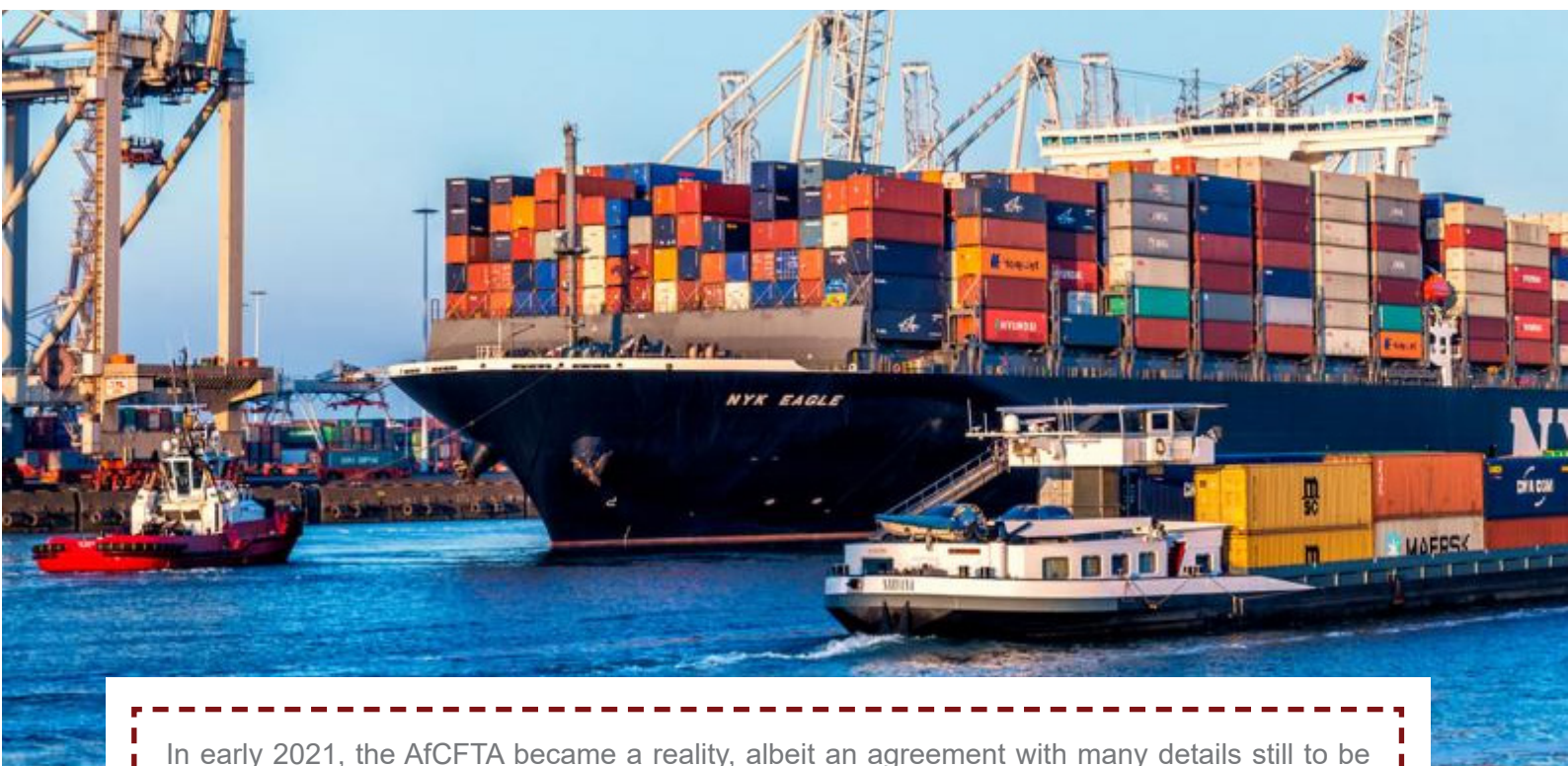
The Deputy Minister of Trade, Industry and Competition, Mr Fikile Majola, says that South Africa must look beyond its borders to accomplish the task of inclusive economic growth and job creation in the wake of the COVID-19 pandemic. He delivered the main address at the virtual Africa Day commemoration of the National Council of Provinces (NCOP). Majola says it is critical to move with speed towards building a strong foundation for Africa's inclusive economic growth, and the African Continental Free Trade Area (AfCFTA) provides the platform to advance this core objective. The 13th Extra-Ordinary Summit of the African Union Heads of State and government on the AfCFTA held on 5 December 2020 provided the legal basis for the operationalisation of preferential trade from 1 January 2021, and this has been a significant step towards the realisation of a socio-economic integrated continent.

The AfCFTA will create the largest free-trade area in the world by a number of countries participating and will connect 1,3 billion people across 55 countries with a combined GDP valued at U\$ 3,4 trillion. However, to make this a reality, significant policy reforms and trade facilitation measures are also necessary. Majola says one of the instructive lessons learned from the COVID-19 pandemic is that economic resilience and self-sufficiency are critical. He says that given that many African countries do not have the means to cushion themselves against the resultant economic devastations, building up industrial capabilities, trade, and supply chains across African countries is important. "Our country accounts for approximately a quarter of intra-trade in the continent and will benefit massively from driving the consolidation of Africa's integrated market. The creation of capacity to produce PPE in the fight against COVID-19 has also given South Africa the opportunity to become a supplier to the SACU communities and broader African continent," Majola said. The importance of African trade in South Africa's overall trade continues to grow. In 2019, 27 % of South Africa's world exports and 12 % of world imports were intra-Africa. South Africa continues to record a large trade surplus with the rest of Africa, exporting mainly mineral products, machinery, chemicals, and iron and steel products, accounting for over 50 % of its total exports. South Africa's exports into Africa grew from about R9 billion in 1994 to over R340 billion by 2019. Considering that in 2019 Africa imported about R8 trillion worth of goods, South Africa's share of global exports into Africa is still relatively small, but this is bound to change with the implementation of the AfCFTA. Majola told the members of the NCOP that the continent's full potential would remain unfulfilled unless efforts are made to address the challenges of poor infrastructure, small and fragmented markets, under-developed production structures and inadequate economic diversification.

Link: DTIC (<http://www.thedtic.gov.za/afcfta-is-a-key-instrument-in-post-covid-19-recovery/>)



## The African Continental Free Trade Agreement (AfCFTA): What has South Africa actually offered Africa?



In early 2021, the AfCFTA became a reality, albeit an agreement with many details still to be finalised. The objective for this trade brief is to examine the African Continental Free Trade Area (AfCFTA) tariff offer by South Africa (actually, this is the Southern African Customs Union (SACU) offer, since SACU makes a collective offer as a customs union) and assess that schedule against the imports into South Africa from non-SACU Africa during the 2019 year. Many complications in this process have necessitated this trade brief being an initial and incomplete analysis, but it gives some perspective on what South Africa (SACU) offers under the AfCFTA. Since South Africa is by far the largest economy in SACU, South Africa's imports account for the dominant share of SACU's imports. For these reasons, the focus in this trade brief is on South Africa, its imports from African countries, and the tariff offer that South Africa (SACU) has tabled in the AfCFTA negotiations in December 2020.

Link: TRALAC (<https://www.tralac.org/publications/article/15221-the-african-continental-free-trade-agreement-afcfta-what-has-south-africa-actually-offered-africa.html>)

## Making the AfCFTA and the RECs' work



The Regional Economic Communities (RECs) are the official pillars of the African Economic Community (AEC). The AEC Treaty (the Abuja Treaty) came into force in May 1994, and it provides for the AEC to be set up through a gradual process, through co-ordination, harmonisation, and progressive integration of the activities of the RECs. There have not been official assessments as to how this formula has worked and how the RECs have advanced the arrival of the AEC. The UN's Office of the Special Advisor on Africa (OSAA) has issued a document dealing with developments up until 2015, which describes the role of the RECs in the future tense and also ascribes to their responsibility for peacekeeping: "Beyond their role in peace and security, RECs have the immense challenge of working with governments, civil society and the AU Commission in raising the standard of living of the people of Africa and contributing towards the progress and development of the continent through economic growth and social development. The RECs will be highly essential and instrumental for the effective implementation, financing, monitoring and evaluation of Agenda 2063 and its flagship programmes, at particularly the regional levels." In terms of the AfCFTA Agreement (adopted in 2018), the RECs' Free Trade Areas are now also the building blocks of the AfCFTA.[3] Is this a new function or a continuation of an old one? The AfCFTA instruments do not answer this question, and it does not seem to require a new explanation. However, the AfCFTA Agreement does provide important clarifications: the AfCFTA introduces parallelism, the *acquis*, and says expressly that REC Free Trade Areas (FTAs) are "building blocks for the AfCFTA"[4] that do not require them to become CUs in the process. The only reference to a customs union appears in the list of General Objectives, which includes "to lay the foundation for establishing a Continental Customs Union at a later stage".[5]

Link: TRALAC (<https://www.tralac.org/blog/article/15233-making-the-afcfta-and-the-recs-work.html>)

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