

TRADE PROBE

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FOREWORD

Welcome to the one hundred (100th) issue of the Trade Probe publication coordinated by the Trade Research Unit under the Markets and Economic Research Centre (MERC) of the National Agricultural Marketing Council (NAMC). The Trade Probe publication is co-produced by the NAMC and the National Department of Agriculture.

The theme of this issue focuses on leveraging South Africa's G20 Presidency to expand agricultural trade and competitiveness. As South Africa assumed its G20 Presidency on the 1st of December 2024, new opportunities emerge to strengthen agricultural trade, investment, and competitiveness within the world's largest economies. Authors analysed trade trends of specific commodities, proposed strategies and trade arrangements for expanding market access. Furthermore, analyses of tariff and non-tariff measures that are currently restricting agricultural trade within this group are explored.

Guided by the mandate of the NAMC, the current issue of the Trade Probe seeks to inform policymakers, producers, traders, and other stakeholders about the opportunities brought about by South Africa's Presidency of the world's biggest economies summit. Moreover, the issue aims to advise how South Africa's agricultural sector can strategically position itself globally and take advantage of reforms globally and opportunities.

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CONTRIBUTORS

Dr. Solly Molepo | Ms. Lesedi Mokoena | Ms. Naledi Radebe | Ms. Nokuthula Khulu | Mr. Bernard Manganyi
Mr. Bhekani Zondo | Mr. Buhlebemvelo Dube | Mr. Lucas Moswane | Mr. Lwazi Dladla | Mr. Thabile Nkunjana
Mr. Thamaga Malapane | Mr. Thulani Ningi | Mr. Maremo Mphahlele

BRIDGING CONTINENTS: SOUTH AFRICA'S G20 LEADERSHIP AND THE FUTURE OF GLOBAL TRADE

Lesedi Mokoena

As South Africa chairs the 2025 G20 Summit, it steps onto the global stage marked by uncertainty, urgency, and opportunity. South Africa is the first African country to assume the G20 Presidency, following Brazil's leadership in 2024, and will hand over the baton to the United States in 2026 (G20 South Africa, 2024). It is imperative for South Africa to build on Brazil's efforts from the previous years' summit, considering the upcoming transition from the Global South to the Global North – which marks South Africa's pivotal role in bridging the interests of

developing and developed economies. At a time of intense geopolitical conflicts, rising food insecurity, high unemployment rates, and pervasive poverty weigh heavily on economies worldwide – the urgency for bold cooperative action has never been greater.

South Africa's economy is export-oriented, with agriculture playing a significant role. The sector contributes approximately 12% of the export-earnings, with key exports including citrus, maize, wine, and wool.

Table 1: South Africa's agricultural trade performance from 2020 – 2024

Year	SA Agricultural Exports value in thousand (\$)	SA Agricultural Imports value in thousand (\$)	SA Trade Balance value in thousand (\$)
2020	10 266 099	5 895 487	4 370 612
2021	12 320 790	6 821 433	5 499 357
2022	12 859 660	7 238 787	5 620 873
2023	13 240 308	6 950 867	6 289 441
2024	13 717 847	7 448 073	6 269 774

Source: Trade Map (2025)

Table 1 illustrates the strength of SA's agricultural trade, the consistent trade surplus over the past five years highlights agriculture's critical role in South Africa's

economy. The trade surplus peaked in 2023, underscoring the sector's resilience and its potential to drive economic growth.

However, the global trade landscape is increasingly characterized by protectionist policies and a retreat from globalization, posing challenges for South Africa's trade relations with key partners such as China, the European Union (EU), and the United States amongst a few (WTO, 2023).

China stands as one of South Africa's key trading partners, with the value of agricultural exports from South Africa reaching approximately \$735 million in 2024 (Trade Map, 2025). Nearly 80% of South Africa's wool exports go to China, though strict sanitary and phytosanitary measures have previously resulted in bans, particularly due to biosecurity challenges such as the foot-and-mouth disease outbreaks. To strengthen its trade position with China, South Africa can use its BRICS membership to push for reduced non-tariff barriers (NTBs) on key agricultural products. Investing in agro-processing will also help shift from raw commodity exports, while aligning with China's Belt and Road Initiative (BRI) can enhance infrastructure and logistics for smoother trade (McBride et al., 2023). Apart from China, the EU offers alternatives for market access.

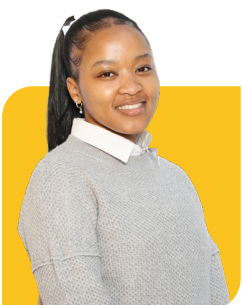
The EU serves as South Africa's third largest trading partner, with the Economic Partnership Agreement (EPA) providing preferential access for South African exports. However, stringent NTMs, particularly concerning issues like citrus black spot, pose challenges. Enhancing regulatory cooperation to harmonize standards could reduce compliance costs. Embracing sustainable agricultural practices aligns with the EU's Green Deal and opens opportunities in the carbon market.

The United States is a significant market for SA's agricultural exports. Under the African Growth and Opportunity Act (AGOA), South Africa enjoys tariff-free quotas on products such as wine, citrus, soybeans, sugar cane, and beef. However, recent political developments have raised concerns about the potential revocation

of AGOA benefits, which could adversely affect these sectors (Cocks, 2025). Engaging in dialogue to address policy disagreements and emphasizing mutual benefits are essential to maintain and enhance this trade relationship.

The African Continental Free Trade Area (AfCFTA) presents a monumental opportunity to bolster intra-African trade by reducing tariffs and NTBs. Projections suggest that by 2030, intra-African agricultural trade could increase by 574% if import tariffs are eliminated (Munyati, 2023). South Africa's leadership can drive the effective implementation of AfCFTA protocols, enhancing regional trade integration. Assisting neighbouring countries in meeting international standards can elevate the overall quality of African exports, making them more competitive globally (Munyati & Signe, 2023). South Africa can leverage its G20 leadership to advocate for a fairer global trade system by urging developed countries to reduce trade-distorting agricultural subsidies. This initiative aims to reduce environmentally harmful subsidies and promote practices that are both economically and ecologically sustainable (FAIRR, 2025). By encouraging G20 members to reform their subsidy structures, South Africa seeks to promote a more balanced and fair agricultural trading environment.

In conclusion, South Africa's G20 chairmanship carries the immense responsibility of bridging the interests of both emerging and developed economies. With the U.S. set to take over G20 leadership in 2026, it's imperative that both SA and the U.S. align their priorities and resolve any geopolitical tensions that could hinder progress. A seamless transition from the Global South to the Global North requires a commitment to fairer trade, pragmatic dialogue, and a shared vision for inclusive economic growth. The world is watching – will this moment be one of division or will SA and the U.S. rise to the occasion to ensure that trade becomes a force for shared prosperity rather than a tool of polarization and division.



Author: Ms Lesedi Mokoena is an Economist Intern under MERC - Trade Research Unit - at the National Agricultural Marketing Council. She can be contacted at lmokoena@namc.co.za or (012) 341 1115.



TRADE CHILLING WITHIN THE G20: A CASE OF SOUTH AFRICA'S AGRICULTURAL EXPORTS

Bhekani Zondo and Nokuthula Khulu

In South Africa, the agricultural sector remains vital for generating export earnings, given that the country is the biggest producer and exporter of agricultural products in the African continent. This is largely underscored by collaborative efforts of both government and industry in maintaining good relations with existing markets and opening of new markets. Although the sector remains prone to global disruptions due to geopolitics, disease outbreaks, and climate change, efforts to adhere to export requirements such as pre-export controls, sanitary and phytosanitary (SPS) requirements among other things have somewhat contributed to the sustained export growth of South Africa's agricultural products. In 2024, the African continent retained its position as South Africa's major export destination for agricultural products with a share of 44% of exports, followed by Asia (21%), the European Union (19%), Middle East (8%), the United Kingdom (UK) (7%), and America's (6%) with the United States of America (USA) specifically accounting for a share of 4% (Trade Map, 2025).

As South Africa assumed its G20 Presidency on the 1st of December 2024, new opportunities emerge to strengthen agricultural trade, investment, and competitiveness. Therefore, the aim of this article is to analyse the current barriers limiting South Africa's agricultural exports within the G20 and underlying opportunities to expand the

country's agricultural trade and competitiveness within the G20 network.

Intra-G20 agricultural trade

Figure 1 below illustrates intra agricultural trade amongst the G20 member states over the past decade. The results shows that intra agricultural trade amongst G20 countries has maintained a trade deficit over the years. In 2024, agricultural exports exported within the G20 were valued at approximately US\$ 621 billion while intra G20 imports were valued at about US\$ 652 billion. Both agricultural exports and imports have recorded positive growth rates of 57% and 52%, respectively over the period under consideration. Despite agricultural exports within G20 exhibiting a linear growth trend with a rate exceeding the growth rate of imports, intra-G20 agricultural exports have maintained a negative trade balance.

Currently, the USA remains the largest importer and exporter of agricultural products within the G20 with a share of 23% of imports and 21% of exports in value terms. Other major intra-G20 importers of agricultural products are China with a share of 20%, Japan (7%), Canada (6%), Germany (6%), Mexico (6%), and the UK (5%), among others. Whereas in terms of exports, other leading exporters of agricultural products destined for

other G20 member countries are Brazil (14%), Canada (10%), Mexico (9%), China (7%), and France (7%), among others. In terms of the traded products, soybeans are currently the leading imported commodity accounting for a share of 9% of total agricultural products imported within G20, followed by frozen boneless beef, food

preparations, pastry products, wheat and meslin, wine, maize, and fresh or chilled beef, among others. Similarly, soybean is the leading intra-G20 exported products, followed by beef, maize, food preparations, wheat and meslin, pastry products, oilcake, and palm oil.

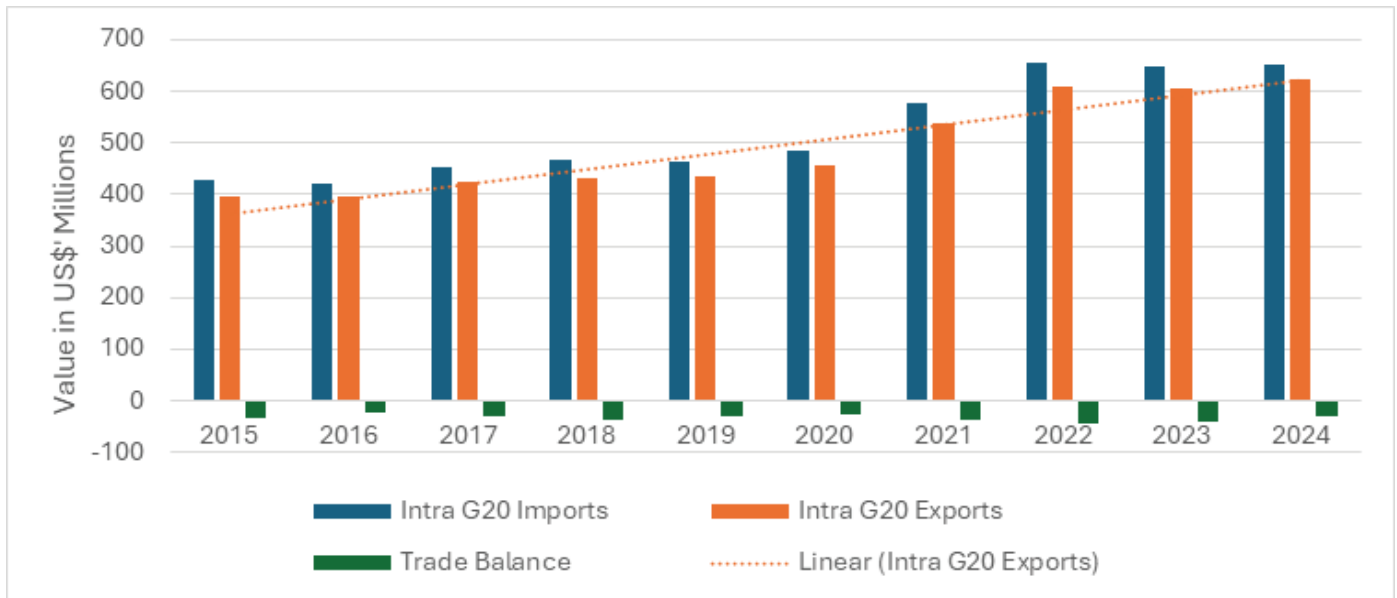


Figure 1: South Africa's agricultural trade performance from 2020 – 2024

Source: Trade Map (2025)

In terms of agricultural trade, South Africa imports and exports a relatively small proportion of agricultural products traded within the 19 selected member states of the G20. South Africa accounts for a share of only 1% for both intra-G20 imports and exports, respectively. Table 1 below shows the trade barriers faced by South Africa in exporting the leading intra-G20 exported products. In essence, the table shows the differences in tariff regimes and NTMs subjected to South Africa's agricultural exports across the G20 member states. Countries like the USA, Canada, and Australia impose zero tariffs on most products due to either existing trade

protocols or agreements although they pair this with significant NTMs. For example, the USA's NTMs on soya beans indicating stern regulatory or quality standards. On the contrary, high protectionist tariffs in markets such as Korea, India and Türkiye directly hinder market access. Processed products like beer malt and wine also face steep tariffs, notably in India and Indonesia, and strict NTMs in markets like Russia and Brazil. Meanwhile, Japan leverages on NTMs to limit beef imports. These indifferences highlight challenges that the South African exporters are facing, absorbing compliance costs tied to NTMs and prohibitive tariffs in some markets.

Table 1: Trade barriers for South Africa's agricultural exports within the G20

Importers	Soya beans		Boneless beef (Frozen)		Wheat and meslin		Maize		Wine		Fresh or chilled beef (boneless)		Oilcake		Beer malt		Raw sugarcane		Cotton	
	Tariff	NTMS	Tariff	NTMS	Tariff	NTMS	Tariff	NTMS	Tariff	NTMS	Tariff	NTMS	Tariff	NTMS	Tariff	NTMS	Tariff	NTMS	Tariff	NTMS
USA	0%	46	0%	55	0	104	0%	26	0%	59	0	55	0	14	0	56	0%	47	0%	21
China	3%	159	12%	151	65%	87	65%	110	14%	69	12%	145	5%	80	0%	68	50%	74	0%	24
Japan	0%	29	38.5%	19	124.1%	9	0%	13	15.22%	10	38.50%	18	0%	15	0%	10	0%	24	0%	0
Canada	0%	43	26.5%	66	76.5%	42	0%	20	0%	48	26.50%	66	0%	26	0%	46	0%	35	0%	9
Mexico	0%	13	25%	14	0%	23	20%	20	16%	20	20%	16	0%	4	21%	21	36%	13	0%	8
United Kingdom	0%	0	127%	0	0%	0	0%	0	0.79%	0	55.36%	0	0%	0	0%	0	2.51%	0	0%	0
France	0%	41	47.1%	33	0%	25	0%	19	0.47%	25	45.11%	25	0%	19	0%	22	0%	45	0%	11
Korea	487%	50	40%	64	3%	38	328%	25	15%	63	40%	60	1.80%	35	30%	63	3%	48	0%	0
Germany	0%	41	47.1%	33	0%	25	0%	19	0.47%	25	45.1%	25	0%	19	0%	22	0%	45	0%	11
Indonesia	0%	10	5%	64	0%	4	5%	37	90%	42	5%	51	5%	33	63.47%	42	5%	4	0%	3
India	45%	50	30%	73	100%	62	50%	56	150%	45	30%	73	15%	3	100%	44	30%	59	5%	5
Italy	0%	41	47.1%	33	0%	25	0%	19	0.47%	25	45.1%	25	0%	19	0%	22	0%	45	0%	11
Türkiye	0%	14	225%	26	0%	19	130%	17	70%	21	225%	26	5%	9	0%	21	19.30%	14	0%	0
Australia	0%	0	0%	0	0%	0	0%	0	5%	0	0%	0	0%	0	0%	0	0%	0	0%	0
Saudi Arabia	0%	94	6%	107	0%	105	0%	104	0%	82	0%	108	0%	52	0%	82	5%	100	5%	32
Russia	0%	37	15%	32	5%	12	0%	25	12.50%	23	15%	38	0%	11	2.50%	21	5%	8	0%	1
Brazil	8%	59	12%	45	0%	49	8%	48	20%	42	12%	45	6%	33	20%	27	8%	30	6%	13
Argentina	8%	24	21%	22	0%	26	8%	30	35%	24	12%	21	6%	21	20%	20	8%	19	6%	22

Source: Market Access Map (2025)

In conclusion, South Africa's participation in intra-G20 agricultural trade remains relatively small, due to tariff and NTMs. Whereas, some G20 markets, such as the USA, Canada, and Australia, impose zero tariffs, stringent NTMs present significant challenges for South Africa's agricultural trade. Other markets, such as India, Korea, and Türkiye, impose high protectionist tariffs which further limits the country's market access within G20. Despite these barriers, South Africa's G20 chairmanship presents an opportunity to strengthen trade relations, negotiate better market access conditions, and enhance competitiveness within the global agricultural economy.

Therefore, South Africa should leverage its G20 Presidency to advocate for reduced tariffs and harmonized NTMs, particularly in high-barrier markets like India, Korea, and Türkiye. Negotiating preferential trade agreements or deepening existing trade partnerships with key importers such as China, Japan, and Brazil can help lower trade costs and improve market access for agricultural exports. Lastly, to overcome restrictive NTMs, South Africa must invest in export certification infrastructure, quality assurance programs, and technology-driven compliance mechanisms to meet strict SPS and technical standards in markets like the USA, Japan, and the EU.



Author: Mr. Bhekani Zondo is an Economist under the Trade Research Unit at the National Agricultural Marketing Council. He can be contacted at bzondo@namc.co.za or (012) 341 1115.



Author: Ms. Nokuthula Khulu is an Economist Intern under Agritrust Unit at the National Agricultural Marketing Council. She can be contacted at nkhulu@namc.co.za or (012) 341 1115.



MARKET ACCESS AND INVESTMENT: CATALYZING INCLUSIVE GROWTH IN SOUTH AFRICA'S AGRICULTURAL SECTOR

Buhlebemvelo Dube, Lwazi Dladla, Maremo Mphahlele and Lucas Moswane

Background

Market access and investment are essential drivers of inclusive growth within South Africa's agricultural sector, especially as the nation takes on the G20 chairmanship. The World Trade Organization (WTO) underscores the importance of preventing arbitrary trade barriers, a principle that encourages investor confidence, job creation, and competitive pricing. South Africa can utilize these principles to ensure its agricultural products, particularly from small businesses, women, and underrepresented groups, enter global markets competitively.

Market access to boost the G20 Agriculture

In the case of agricultural goods, market access is mainly restricted by tariff and non-tariff measures. The international trade environment has experienced unprecedented levels of increased protectionism and thus discouraging trade between countries. The G20 members are dominant global agricultural trade players and could ensure market access is intensified. Furthermore, it's essential that the guiding principles of the WTO be emphasized during the summit. The following principles are important: (1) making agricultural market access conditions more transparent, predictable and

competitive, (2) establishing or strengthening the link between national and international agricultural markets, and (3) relying more prominently on the market for guiding scarce resources into their most productive uses both within the agricultural sector and economy wide (WTO, 2019).

Market access enables inclusive economic growth, and it also provides a conducive environment for regional integration. **Figure 2** illustrates the evolution of South Africa's regional trade agreements (RTAs), which have increased from six in 2016 to seven in 2024, reflecting steady regional integration efforts. Key milestones include the entry into force of the SADC-EU Economic Partnership Agreement (EPA) in 2016 and the African Continental Free Trade Area (AfCFTA) in 2019. South Africa's current RTAs in force include SACU-EFTA, SADC, TDCA (with the EU), SADC-EU EPA, and the AfCFTA, with SACU-India PTA still under negotiation (DTIC, 2024). These agreements grant South Africa more favourable trading conditions through preferential arrangements and suggest improved market access. The upcoming G20 summit presents an opportunity to further emphasize regional integration as a platform for expanding agricultural trade.

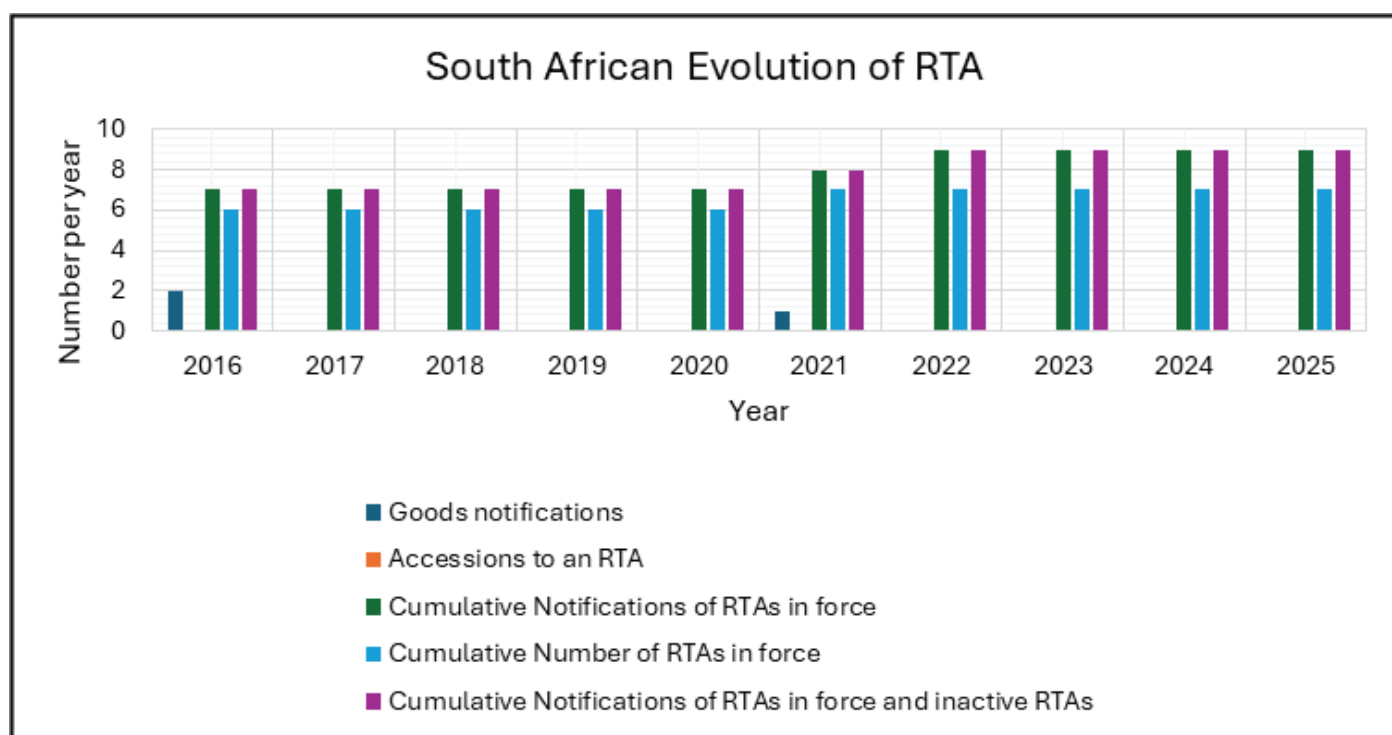


Figure 2: South African evolution of Regional Trade Agreements

Source: WTO (2025)

Investment in Agricultural Infrastructure

Overcoming market barriers is essential for enabling South African Small, Medium, and Micro Enterprises (SMME) to integrate into global value chains. Developing countries such as South Africa can benefit from the use of investments and input subsidies under certain conditions. Moreover, infrastructure investments in rural areas, transportation, water reserves, renewable energy, ports, and machines can stimulate job creation and provide SMMEs with access to larger markets. Financial inclusion through mobile banking, micro-loans, and literacy programs is also vital for supporting marginalized groups in the agricultural value chain. Infrastructure investments in underserved areas such as rural and township economies are essential for inclusive growth.

Figure 3 illustrates that Africa has struggled with investment at less than 10% (2012-2022) compared

to Europe which has at least 30% in the same period. Technical and financial assistance is one other way to attract such investments. Europe exhibits the greatest consistency in capitalization among its countries, with an average Agricultural Investment Ratio (AIR) exceeding 30 percent over the past decade. In contrast, other regions, particularly the Americas and Asia, show more variation in the level of gross fixed capital formation in agriculture. In these regions, the agricultural sector tends to be less capital-intensive on average, despite significant investment levels. There are measures that can be applied to boost investment guided by WTO channels such as investment subsidies, agricultural input subsidies, or domestic support to farmers. These developmental programs can position the G20 summit to effectively address low agricultural investment in Africa.

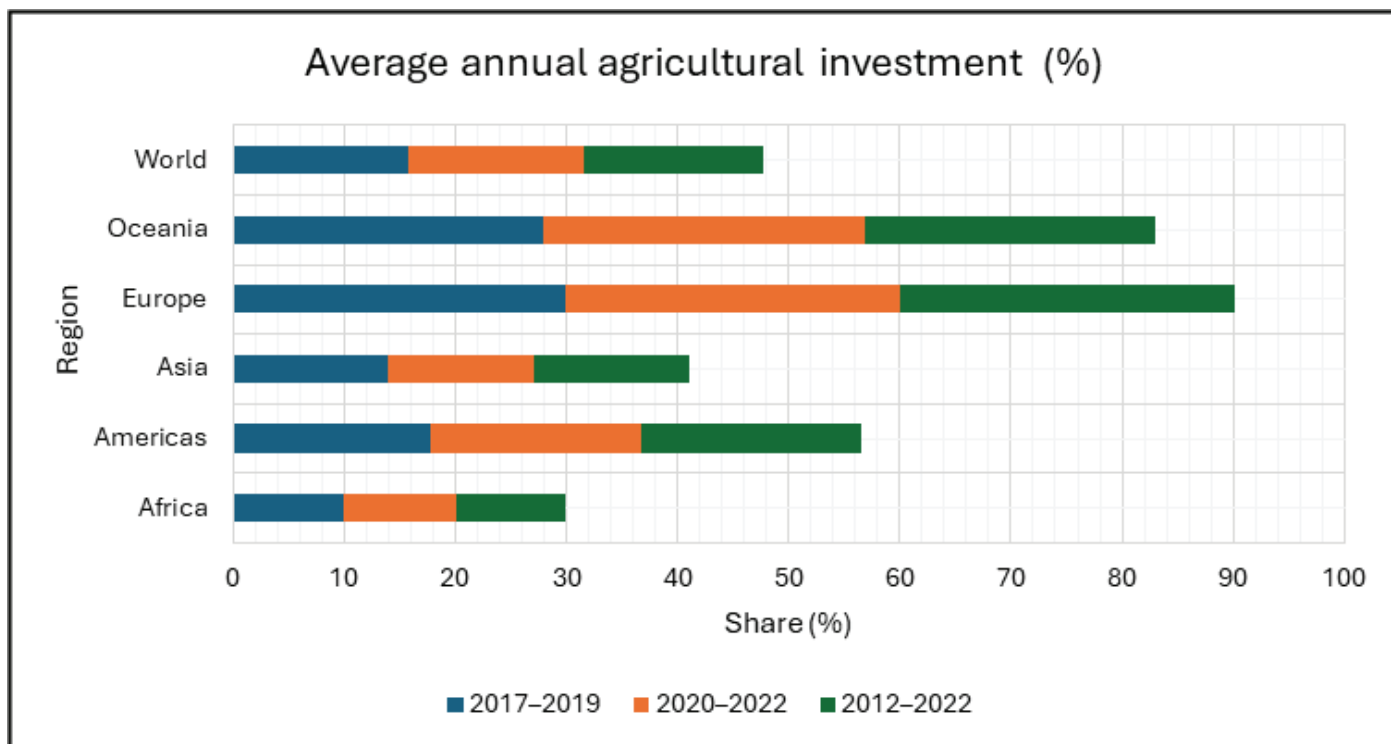


Figure 3: Average annual agricultural investment by region (%) share

Source: FAOSTAT (2023)

South African export market opportunities in the G20

Figure 4 presents realistic export opportunities, identified by Trade Advisory's Export Market Finder highlight South Africa's potential within G20 markets. China offers the largest untapped market value for frozen boneless beef at ZAR 30.76 billion, while India shows demand for crude palm oil (ZAR 18.89 billion) and soybean oil (ZAR 13.25 billion). The US presents opportunities in malt beer (ZAR 16.85 billion) and baked goods (ZAR 11.45 billion), with Japan showing potential in maize exports valued at ZAR 11.47 billion.

Unlocking these opportunities necessitates improved trade agreements, streamlined export procedures, and adherence to international food safety standards. Strengthening bilateral ties with key markets like the US, China, and India is essential. Maintaining competitiveness requires investment in infrastructure and leveraging market intelligence for demand-driven production. Public and Private sector partnership through initiatives like the Agriculture and Agro-processing Masterplan (AAMP) can boost primary value-added production and promote market diversity.



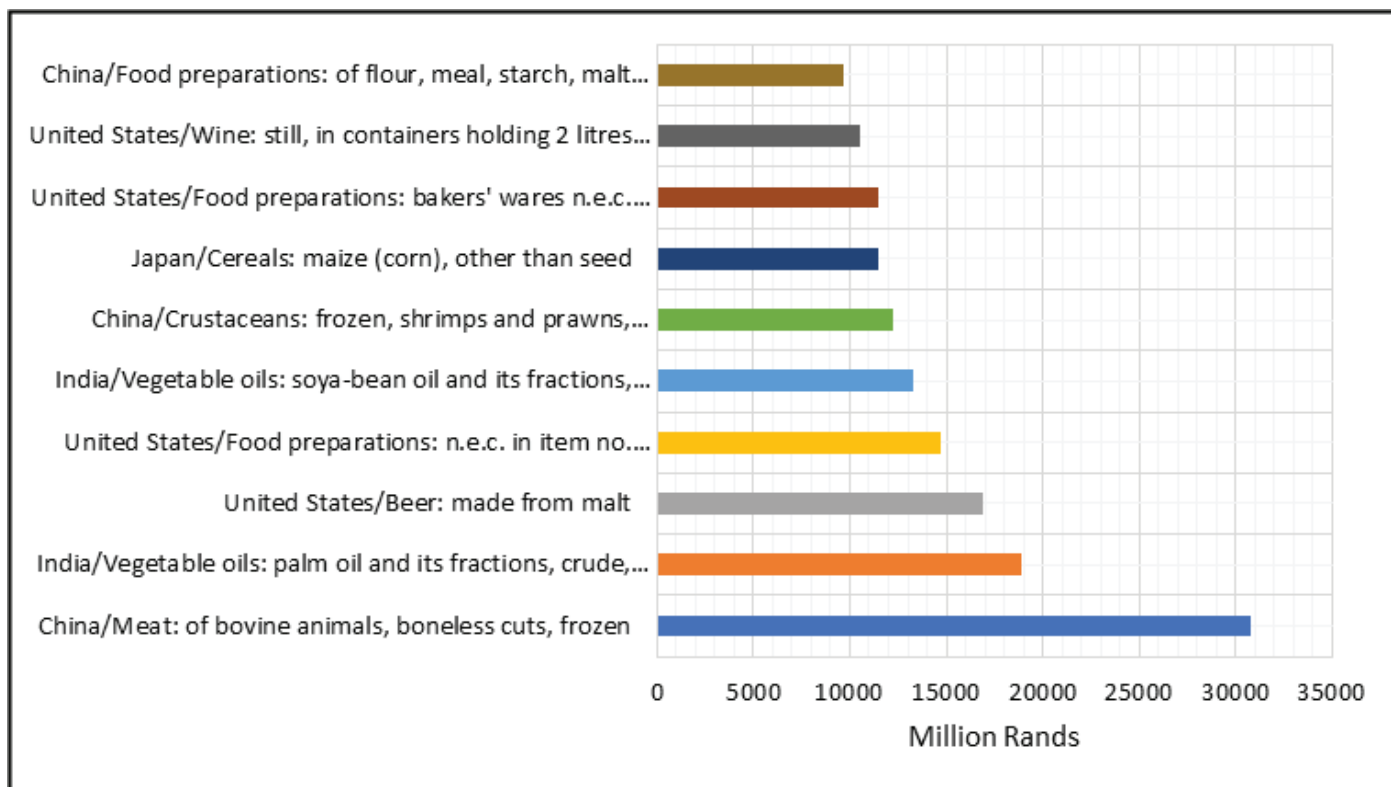


Figure 4: Top 10 realistic export market opportunities for South Africa in G20 Countries from 2018 to 2022.

Source: Trade Advisory Decision Support Model (2025)

South Africa's adherence to international treaties and trade policies ensures its competitiveness in global markets. However, to unlock new markets, foster rural development, and drive inclusive economic growth, sustainable investments are imperative.

Conclusion

As South Africa leads the G20, the focus should be on promoting sustainable development, inclusive finance, and regional integration. Developing nations can harness the full potential of global trade by leveraging these initiatives, ensuring long-term economic prosperity. Public-Private collaboration will be instrumental in

sharpening market access opportunities and agricultural investment. This approach will boost South Africa's agricultural exports and foster inclusive growth and economic resilience within the G20 framework. Ultimately, South Africa's G20 Presidency presents a unique opportunity to shape global agricultural trade policies, promote inclusive growth, and expand its agricultural competitiveness. By addressing market access barriers, investing in sustainable infrastructure, and supporting SMEs, South Africa can position the African continent as a key player in global agricultural trade, driving economic development and prosperity.



Author: Mr. Buhlebemvelo Dube is an Economist under the Trade Research Unit at the National Agricultural Marketing Council. He can be contacted at bdube@namc.co.za or (012) 341 1115.



Author: Mr Lwazi Dladla is an Economist Intern under MERC- Agro Food Chains Unit at the National Agricultural Marketing Council. He can be contacted at ldladla@namc.co.za or (012) 341 1115.



Author: Mr. Maremo Mphahlele is an Economist under the Agribusiness Unit at the National Agricultural Marketing Council. He can be contacted at maremo@namc.co.za or (012) 341 1115.



Author: Mr Lucas Moswane is an Economist : South African Poultry Association. He can be contacted at Lucas@sapoultry.co.za



THE ROAD TO SOUTH AFRICA 2025 SUMMIT: G20 COOPERATION AND OPTIMISM FOR TRADE AND AGRICULTURAL GROWTH

Buhlebemvelo Dube and Matume Maila

1. Background

As the world economy navigates the unprecedented challenges of economic and environmental shocks, the need for international cooperation and a renewed commitment to fostering trade and agricultural growth has never been more pressing. The G20 nations, representing the largest economies globally, have a critical role to play in shaping agriculture and trade landscape that is conducive to sustainable and inclusive development. G20 represents 85% of global GDP, 75% of international trade, and two-thirds of the world's population thus carries a strong mandate for the world and to be hosted in South Africa opens a platform for the South African agricultural sector to leverage, strengthen, and intensify existing strategic objectives of the sector.

From the 1st of December 2024 to the 30th of November 2025, the South African government holds the G20 presidency, which is precisely five years ahead of the UN 2030 Agenda goal. This will allow the G20 countries to assess and reflect on whether the 2030 UN targets are attainable. The South African theme for the G20 summit is based on solidarity, equality, and sustainability. Furthermore, it focuses on three time-bound task forces with the goal of bringing together key stakeholders to produce high-level deliverables. However, what does this theme signify for the growth and improvement of South African trade and agriculture? This review examines the

potential of G20 theme and pinpoints cooperation in driving trade and agricultural growth.

2. Analysis of the Key Themes and expected Outcomes of the 2025 G20 Summit

South Africa's three priorities for the G20 Presidency focus on (1) Inclusive Economic Growth, Industrialisation, Employment and Reduced Inequality, (2): Food Security, (3) Artificial Intelligence, Data Governance and Innovation for Sustainable Development. The three themes are inextricably linked to the current challenges and potential opportunities facing the agriculture sector both domestically and internationally.

2.1. Inclusive Economic Growth, Industrialisation, Employment and Reduce Inequality

The agricultural sector has been subject to climate related disasters such as land degradation, floods and droughts, which have severely impacted agricultural production. In addition, the sector's duality and persistent inequality pose significant threats to trade and agricultural growth. The 2025 G20 meeting provides a unique chance for South Africa to revitalize its agriculture industry and promote inclusive participation in commodity value chains through foreign investment and collaboration. G20 countries can encourage private-sector investments in South Africa's agricultural sector by facilitating public-private partnerships. These investments can focus on

agricultural infrastructure, such as irrigation systems, storage facilities, and modern equipment, which would help farmers improve productivity and create more jobs in farming and agri-businesses. **Figure 5** depicts agricultural employment trends. The sector plays a

crucial role towards the employment of women, with a 0,5% year on year increase in employment, hence boosting agricultural jobs will have a strong effect on the South African economy.

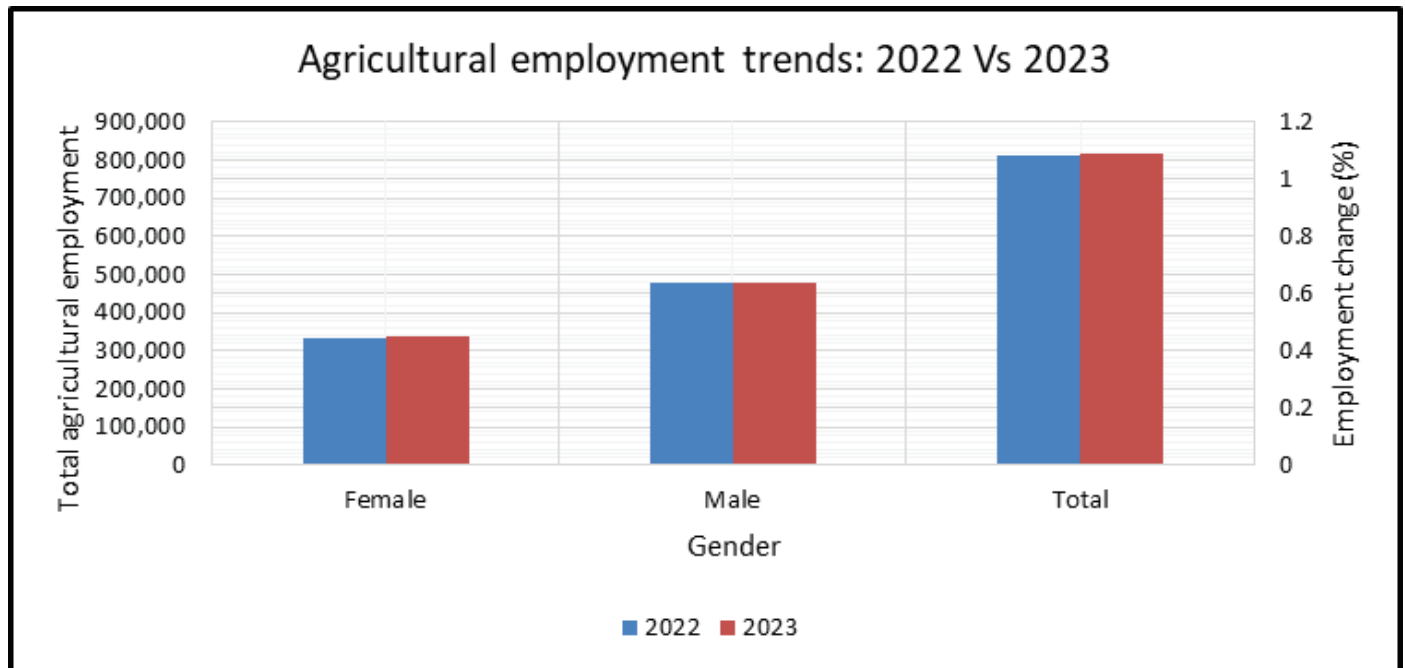


Figure 5: South African agricultural employment trend

Source: Statistics South Africa (2025)

2.2. Food Security

Figure 6 depicts the status of food security in South Africa. Provinces such as North-West still have more than 50% of people either severely food insecure or moderately food insecure. The second task force has significant implication for the sector since it deals with food insecurity, which is an ongoing threat to the country and the continent. The government has the opportunity to align its food policy programs with those of G20 to find solutions to the threat of hunger. The ability to access high quality food at affordable consumer prices

is a challenge given the high food prices, and that most are unemployed. According to Stats SA (2023), in 2021, above three million (17,3%) households were involved in agricultural activities to provide food and more than half a million (683 221) households with children aged five years or younger reported experiencing hunger in 2021 and employment was found to have an important role in ensuring a household's food security; nearly 19% of households without an employed member experienced hunger.

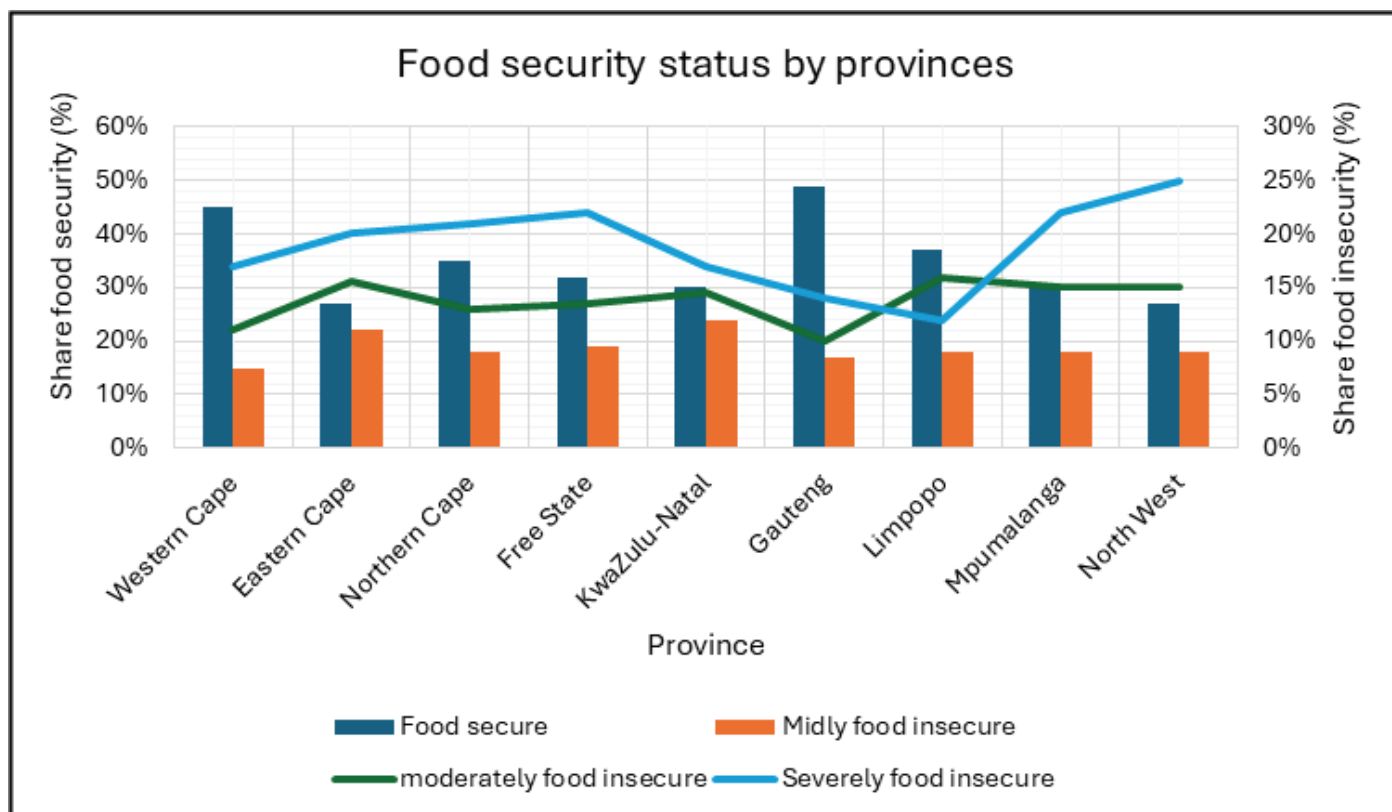


Figure 6: Food security status disaggregated by provinces in South Africa (HFIAS)

Source: Simelane (2025), & National Food and Nutrition Security Survey National Report (2023)

2.3. Artificial Intelligence, Data Governance and Innovation for Sustainable Development

Task force three will be relevant in the context of the use of Artificial Intelligence (AI) tools to combat adaptive pests and diseases, the use of advanced technology for early warning systems against floods or drought episodes, the monitoring of soil moisture content. Challenges brought about by changing climate must contribute towards robust policy discussions. The need

for financial investments and application of drones, seed innovations strategies, data governance, use of advanced technologies in farms to upscale farm management will be invaluable for farmers. Moreover, themes focusing on sustainability will enable G20 members to develop strategies to mitigate and adapt towards climate change without risking food security and also being able to safeguard food security needs of future generations.

3. Conclusion

The G20 summit has a significant impact on the agricultural sector of South Africa and the themes are relevant to the current challenges facing South

Africa, Africa, and the world at large. The G20 marks a crucial milestone for its membership and brings about new opportunities and solutions to the South African agriculture at a point where they are greatly needed.



Author: Mr. Buhlebemvelo Dube is an Economist under the Trade Research Unit at the National Agricultural Marketing Council. He can be contacted at bdube@namc.co.za or (012) 341 1115.



Author: Mr. Matume Maila is a Senior Economist under the Smallholder Market Access Research Unit at the National Agricultural Marketing Council. He can be contacted at mmaila@namc.co.za or (012) 341 1115.





LEVERAGING NEW OPPORTUNITIES FOR SOUTH AFRICA'S CITRUS INDUSTRY DURING THE G20 CHAIRMANSHIP

Thulani Ningi and Bernard Manganyi

Introduction

South Africa's assumption of the G20 Presidency comes at a pivotal moment marked by escalating geopolitical tensions, climate-related challenges, and disruptions in global supply chains (G20 South Africa, 2025). As the only African member of the G20 along with the African Union (AU), South Africa carries the responsibility not only to advance its national interests but also to champion Africa's broader development agenda. The 2025 G20 Presidency, under the theme "Solidarity, Equality, Sustainability," presents a unique opportunity for South Africa to foster inclusive economic growth, structural transformation, and sustainable development. Given this economic environment, the citrus industry is set to benefit from the South African leadership as the G20 President. With growing uncertainties in global trade and the increasing need for diversified markets, the citrus industry has a critical role to play in advancing

trade inclusivity, supporting green industrialisation, and strengthening South Africa's economic resilience.

Positioning South Africa in the global citrus market

In the highly competitive global citrus market, South Africa has established itself as a major player. **Figure 7** presents the top ten exporters of citrus fruit worldwide. In 2023, Spain led with an export value of approximately 3.82 million USD, reflecting a 4% growth from the previous year. South Africa ranked second, exporting citrus fruits worth 1.87 million USD, an impressive 8% growth over the same period (Trade Map, 2025). Among the top ten global citrus exporters, Chile and Greece recorded the highest growth rates at 66% and 49%, respectively, while Morocco experienced a 16% decline between 2022 and 2023. These figures highlight both the strength of South African citrus exports and the increasing competition within the global market.

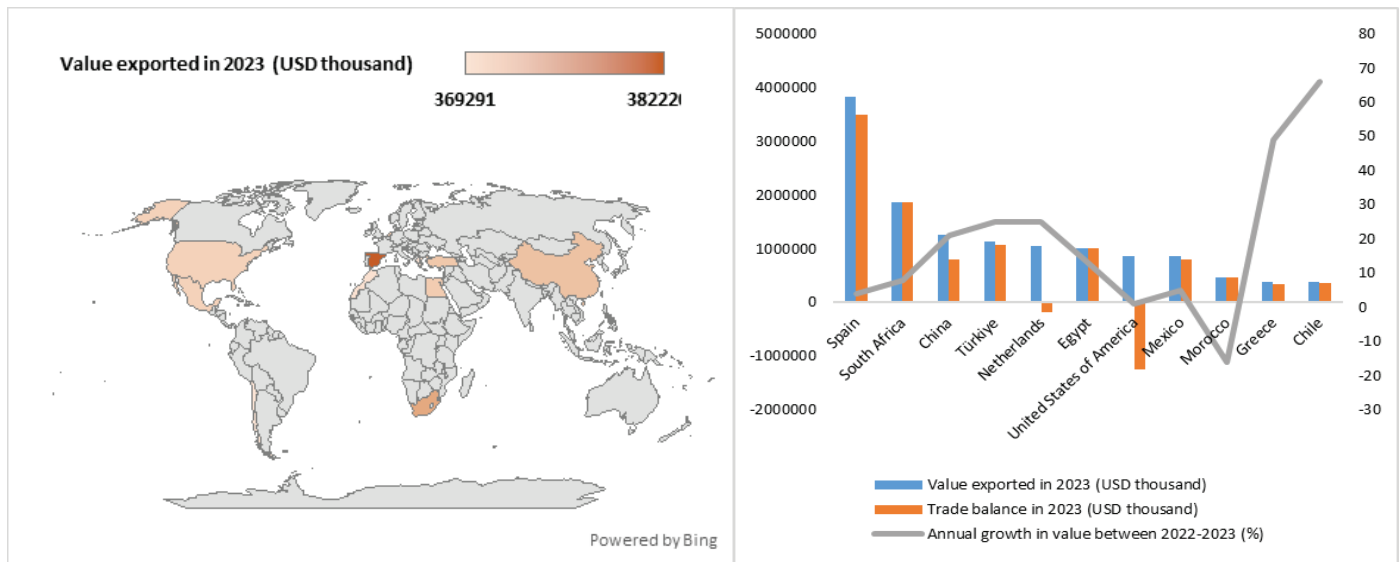


Figure 7: Top 10 Global exporters of citrus fruits in 2023 (USD thousand)

Source: Trade Map, 2025

Current South African orange importers

One of the central priorities of South Africa's G20 Presidency is promoting trade and inclusive growth, including the advancement of the Africa Cooperation Agenda and support for the African Continental Free Trade Area (AfCFTA). **Figure 8** presents the top ten importers of South African citrus fruit, fresh or dried (HS 0805), in 2023. The leading importer of South African citrus was the Netherlands, with 425.79 thousand USD, representing a percentage share of 22.8%. This was followed by the United Arab Emirates with a value of 172.19 thousand USD(9.2%), the United Kingdom at 161.16 thousand USD(8.6%), the Russian Federation at

146.267 USD (7.8%), the United States of America at 134.68 thousand USD (7.2%), China at 107 thousand USD(5.7%), Canada at 91.74 thousand USD(4.9%), Portugal at 77.34 thousand USD (4.1%), Hong Kong, China at 58.72 thousand USD (3.1%), and Saudi Arabia at 56.6 thousand USD (3%).

Countries such as Canada, China, Russia, Saudi Arabia, and members of the European Union- the Netherlands, France, Germany, and Italy are part of the 19 countries in the G20. These nations are crucial to South Africa's citrus industry, representing both key existing markets and potential areas for expansion.

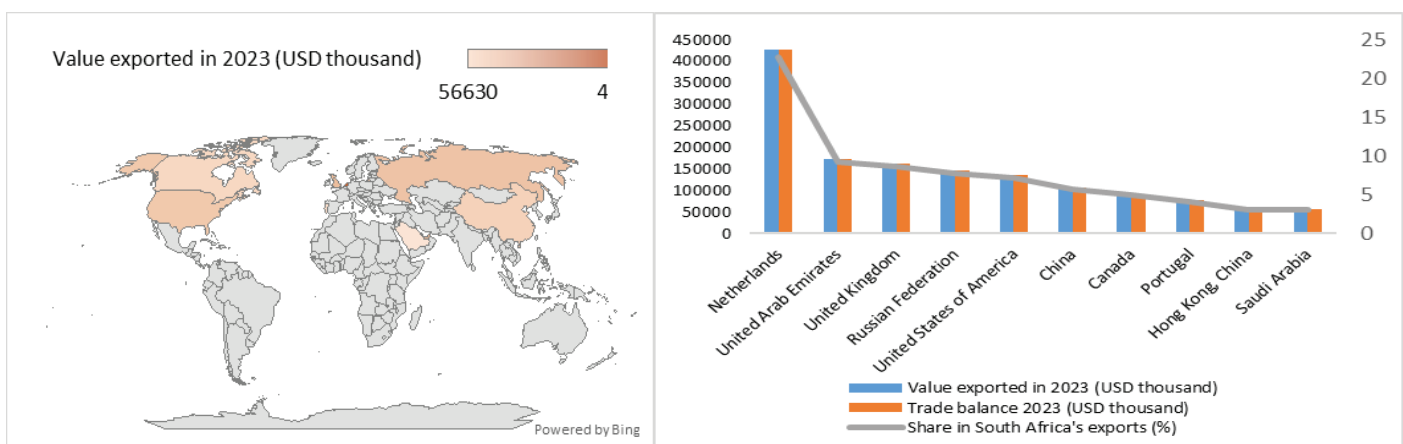


Figure 8: Top ten importers of Citrus fruit from South Africa in 2023 (USD thousand)

Source: Trade Map, 2025

Opportunities for South Africa as the current G20 President

Figure 9 illustrates the top ten citrus markets with the highest potential for South Africa as of 2023, measured in USD. The leading markets for South African citrus

exports (HS code 080590) include Zambia, Germany, Botswana, and Namibia. Notably, Zambia presents the largest gap between potential and actual exports, with an unrealised export opportunity valued at \$1.3 million.

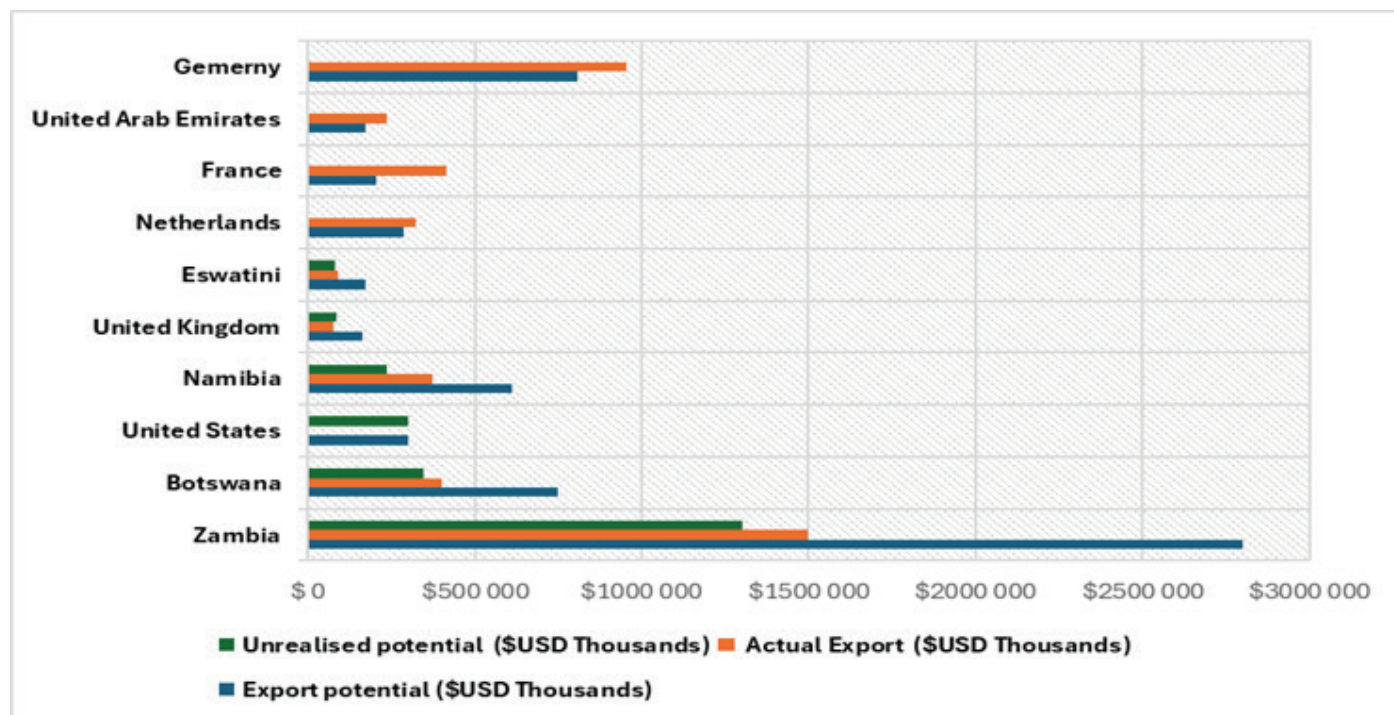


Figure 9: Top ten citrus potential markets for South Africa

Source: Trade Map (2025)

As the current President of the G20, South Africa has a unique opportunity to strengthen its citrus industry by leveraging the platform to advocate for stronger intra-African trade partnerships. Notably, none of the African Union member states are among the top ten importers of South African citrus fruits, highlighting a gap that can be addressed through the African Continental Free Trade Area (AfCFTA). Therefore, reducing trade barriers, harmonizing standards, and facilitating smoother cross-border trade can open African markets. Furthermore, the G20 Presidency enables South Africa to build ties with key economies in Asia, the Middle East, and Latin America, reducing the sector's reliance on traditional markets and enhancing its resilience against trade disruptions. The G20's focus on inclusive growth also supports the integration of developing countries into global value chains, offering South Africa's citrus industry opportunities to improve access to new markets, foster value addition at the source, and promote fair trade practices. In addition, under South Africa's G20

leadership, green industrialisation and investment remain critical priorities, aligning with the citrus industry's ongoing efforts to adopt sustainable farming practices and mitigate climate risks. The G20 Framework on Inclusive Green Industrialisation will open avenues for investment in eco-friendly technologies, such as water-efficient irrigation systems, renewable energy solutions for farming operations, and climate-resilient crop varieties. South Africa can also use the G20 platform to push for increased financial and technological support for climate adaptation in agriculture, helping citrus farmers access funding to implement sustainable practices, build resilience against extreme weather events, and reduce their carbon footprint. Lastly, the G20 provides a vital platform for South Africa to advocate for WTO reforms that address the imbalances faced by developing countries, ensuring the citrus sector has equitable access to global markets without facing unjust trade barriers.

Conclusion

South Africa's G20 Presidency presents a strategic opportunity to enhance the global competitiveness of its citrus industry while driving broader economic and trade initiatives. As a key agricultural export sector, citrus production stands to benefit from expanded market access, strengthened intra-African trade under the AfCFTA, and deeper engagements with G20 economies. By leveraging the Presidency's focus on inclusivity, sustainability, and fair trade, South Africa can advocate

for policy frameworks that facilitate agricultural trade, promote green industrialization, and attract investment in climate-resilient farming practices. Additionally, the platform provides a means to address structural barriers in global trade, ensuring the citrus sector can thrive amid shifting geopolitical and economic dynamics. Through strategic collaboration and proactive leadership, South Africa has the potential to unlock new opportunities, fostering long-term resilience and growth in its citrus industry.



Author: Mr Thulani Ningi is an Economist under Agro-Food Chains Unit at the National Agricultural Marketing Council. He can be contacted at tningi@namc.co.za or (012) 341 1115.



Author: Mr Bernard Manganyi is an Agricultural Economist under Smallholder Market Access Unit at National Agricultural Marketing Council. He can be contacted at bmanganyi@namc.co.za or (012) 341 1115.



SOUTH AFRICA'S SHEEP MEAT IS BEING SNATCHED BY THE MIDDLE EAST

Thabile Nkunjana

The livestock industry composed of beef, sheep, goats, and pork, is one the biggest of all South African agricultural sector in value terms. As such, it is a crucial sector, particularly when biosecurity is resilient. The industry has expanded over the years, but it has faced several obstacles, such as recent disease outbreaks and an increase in theft, particularly for small livestock like sheep. The aim of this article is to analyse exports of these commodities to the Middle East market. Sheep exports, which are mostly driven by demand from the Middle East, have stagnated for a notable amount of time in comparison to beef. For instance, the value of sheep exports averaged R22.9 million between 2004 and 2013, but this climbed significantly over the following ten years, from 2014 to 2023, when exports averaged at

least R193.4 million year. Beef exports on the other hand were already over R2 billion in 2018.

South Africa's sheep exports globally

Figure 10 below shows South Africa's sheep exports to the world from 2004 to November 2023 in value in Rands. Sheep exports, as previously mentioned, essentially stagnated for years until a discernible increase was observed in 2014. For instance, South Africa's exports of sheep to the global market increased from R3.9 million in 2004 to R695.9 million in 2023. This amounted to a startling 13320% rise. The largest growth in exports throughout this period was seen in 2019, when sheep exports rose from R49.9 million to R695.9 million, a 1 294% gain.



Figure 10: South Africa's sheep exports globally in value (Rand)

Source: ITC, 2025

South Africa's sheep exports to the Middle East

As previously stated, the primary objective of this article was to examine South Africa's sheep exports to the Middle East. South Africa's sheep exports to the Middle East are shown in **Figure 11** along with their value as a percentage share throughout time. South Africa's sheep exports did not significantly increase until the Middle East market opened, according to the trade map's data. South Africa exported zero percent of its sheep to the Middle East market in 2004, but between 2005 and 2013, shipments rose from 1% to 4%.

The percentage share increased noticeably in 2014 when South Africa's exports to the Middle East totalled R11.7 million, or 16% of total exports to the region, with Africa accounting for a little over 80%. However, it was evident that Middle Eastern nations were interested in South African sheep meat.

The Middle East finally surpassed Africa in 2019 and grew rapidly until 2024 as a result of demand from nations like Qatar, Kuwait, and Jordan. By November 2024, the Middle East has grown from 33% in 2019 to 94%. As a result, sheep exports increased from R49.9 million in 2019 to R1.2 billion in November 2024



Figure 11: South Africa's sheep exports to the Middle East in value in percentage share

Source: Trade Map (2025)

Conclusion

The figures above show that there appears to be a growing demand for meat in the Middle East. For instance, the value of sheep meat imports rose by 39.9% worldwide and by 36.9% in the Middle East during the same time period. South Africa has established itself as a competitive provider of sheep meat for the Middle Eastern countries, according to the analyses conducted

here. This can continue since more is being done to prevent disease, but in order to help smallholder and new farmers who are particularly vulnerable to this issue in rural regions, stock theft is a basic issue that needs to be addressed. This would help them to get a share of this growing subsector as it was observed in wool production and eventually exports.



Author: Mr Thabile Nkunjana is a Senior Economist under the Trade Research Unit at the National Agricultural Marketing Council. He can be contacted at thabile@namc.co.za or (012) 341 1115.

SOUTH AFRICA'S SUGAR TRADE TRENDS AND OPPORTUNITIES FOR GROWTH

Naledi Radebe

The Group of Twenty (G20) is an intergovernmental economic forum comprising 19 countries (Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, South Korea, Mexico, Saudi Arabia, South Africa, Russia, Turkey, the UK, and the US) and two regional unions – the EU and AU. It represents 85% of the global economy, 75% of world trade and 67% of the global population (G20, n.d). Since South Africa is the group's head, it has a special chance to influence international policy and represent Africa's interests abroad (South African Reserve Bank, 2024). The agricultural sector plays a significant role to the economy of South Africa, with the sugar industry contributing significantly due to its industrial and agricultural investments, foreign exchange earnings, high employment, and connections with important suppliers, consumers, and support industries. One of the top producers of high-quality sugar at competitive prices worldwide is the South African sugar industry (South African Sugar Association, n.d). South Africa has a strategic opportunity to influence international trade laws, promote equitable market access, and boost the competitiveness of its sugar cane sector as the G20 President. Representing the biggest economies in the world, the G20 provides a forum for discussing trade restrictions, sustainability issues, and business alliances (G20 South Africa, 2024).

In South Africa, the Sugar Act No. 9 of 1978 regulates the sugar industry, which is a commodity that is traded extensively in the agricultural sector (USDA, 2024). Out of about 120 countries that produce sugar, South Africa's R25 billion sugar industry is cost-competitive and routinely ranks in the top 25. The South African

sugar sector makes an estimated average direct income of more than R20 billion year, based on the money made from sugar sales in the SACU region as well as exports to international markets (South African Sugar Association, n.d). The sector produces approximately 2.2 million tonnes of sugar annually on average. At least 76% of this sugar on average is marketed in the Southern African Customs Union (SACU), (South African Sugarcane Research Institute, n.d). The rest is exported to United States, Asian, and African markets (South African Sugar Association, n.d).

Figure 12 below represents the exports of sugar from South Africa to the world for the period of 5 years which is from 2020 to 2024 respectively. On the graph below it shows that South Africa's sugar cane exports have experienced fluctuations between 2020 and 2024, with exports generally surpassing imports. Namibia, Malaysia, Botswana, Korea, Zimbabwe, and United Kingdom are part of the main export markets for South African sugar. When looking at the trend in 2020, South Africa exported to the world approximately \$456 million of sugar cane which was slightly higher than the imports (\$403 million), indicating a net positive trade balance in sugar cane. In 2021 the exports declined to approximately \$388 million respectively compared to 2020. It increased in 2022 to approximately \$417 million but still below 2020 levels. The exports increased in 2023 to approximately \$607 million, indicating a peak in international demand or improved production and again there was a decrease but still maintaining strong export levels in 2024 to approximately \$547 million respectively. South African sugar cane production fell in 2024 as a result of hot, dry

weather in the autumn and winter. This is anticipated to result in a minor decline in sugar exports and production (USDA, 2024). These estimates showed a different change in all these 5 years. The percentage growth for sugar exports from South Africa to the world was

determined to be as follows between 2020-2024 there was an increase in export with approximately 20.4%, while the growth between 2023-2024 was estimated to a decrease with approximately -9.8% respectively.

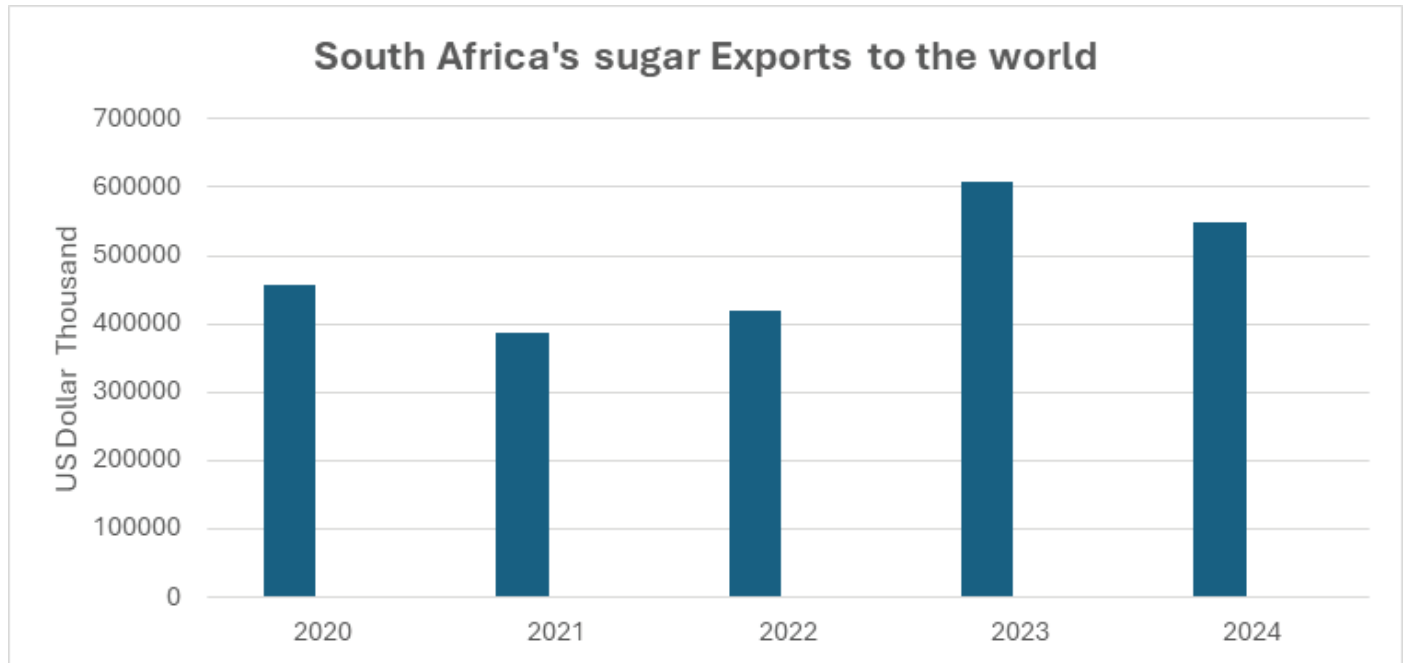


Figure 12: South Africa's sugar cane Exports to the World

Source: Trade Map (2024)

The sugar cane business in South Africa is vital to the agricultural economy, but its sustainability has been impacted by issues like climate change, shifting sugar prices globally, and competition from alternative sweeteners. Large sugar-producing countries like Brazil, India, and the EU provide domestic subsidies to their sugar producers, lowering the price of their product on international markets. The competitiveness of sugar exports from South Africa is affected by this practice (the dtic, 2020). However, a number of growth prospects, such as value addition, technical advancements, and regional market expansion, can help in reviving the sector. Expanding into regional African markets presents a significant growth opportunity for South Africa's sugar industry. Many Southern African Development Community (SADC) nations, such as Zimbabwe, Zambia,

and Mozambique, have growing demand for sugar (USDA, 2024). Strengthening trade relations with these countries can boost exports. South Africa is able to export sugar to the United States duty-free thanks to the U.S. sugar Tariff Rate Quota. The higher buying prices in the US make it a premium market for South African raw sugar exports (USDA, 2024). The Sugar Value Chain Master Plan 2030 highlights industrial diversification strategies, such as biofuel production and other value-added goods (dtic, 2021). However, South Africa may diversify its sugar exports by focusing on value-added products like biofuels and speciality sugars, thereby tapping into G20 countries interested in renewable energy and high-quality commodities. Implementing such a strategy can help South Africa's sugar industry compete on the world scale.



Author: Ms Naledi Radebe is an Economist under MERC-Agro Food Chains Unit at the National Agricultural Marketing Council. She can be contacted at naledi@namc.co.za or (012) 341 1115.



AFRICA'S HIDES AND SKIN BUSINESS IS A SLEEPING GIANT

Thabile Nkunjana and Malapane Thamaga

The skin and hide market size is expected to see strong growth in the next few years. This growth can be attributed to fashion and apparel industry, footwear manufacturing, automotive upholstery, furniture production, and consumer preferences. The hides, skin and leather industry consist of variety of animal skin and hides including horse, sheep, goats, cattle and buffalo to name a few. Exports for this industry in its entirety amounted to \$16.2 billion or R299.4 billion in 2023. However, this article will only focus on raw hides and skin for bovine animals which include cattle and buffalo (HS code: 4101).

Global raw hides and skins industry was valued at \$139.4 billion in 2024 and is expected to reach \$184.8 billion in 2029 according to the Business research company. While this is great news for the global skins and hides largest players, Africa appears to be not ripping the benefits of having some of the largest livestock populations in the world. For example, according to data from the world population review (2025), 6 out of the top 15 world leading countries with large cattle populations are from Africa as of 2022. These include Ethiopia with 67.9 million cattle followed by Chad (35.7 million), Sudan (32.3 million),

Tanzania (31.1 million), Kenya (23.5 million), and Nigeria (20.9 million).

Also, in trade of which this article focuses on, the African continent in relation to the world remains a neglectable player. Data from the World Trade Organisation, the United Nations Conference on Trade & Development, and the International Trade Centre indicate that in 2023, of the \$52.8 billion worth of hides and skins (HS code: 4101) exports, Africa accounted for a mere \$619.4 million which is equivalent to 1% of the global exports for the same year. Africa's insignificant contribution to this industry can be attributed to various challenges and those are partly touched in closing remarks of this article.

Africa vs global raw hides and skins (4101) exports

Figure 13 presents raw hides and skins exports from Africa vs the global hides and skins exports overtime. In 2014, global hides and skins exports amounted to \$72.3 billion, while Africa's amounted to \$1.1 billion. Between 2019 and 2023, global skin and hides exports increased by 40% while Africa's increased by 121%. Nonetheless, Africa's increase is at a lower base. For example, the world hides and skins exports averaged R43.8 billion between 2019 and 2023, while Africa's hides and skins averaged R537.3 million for the same period.

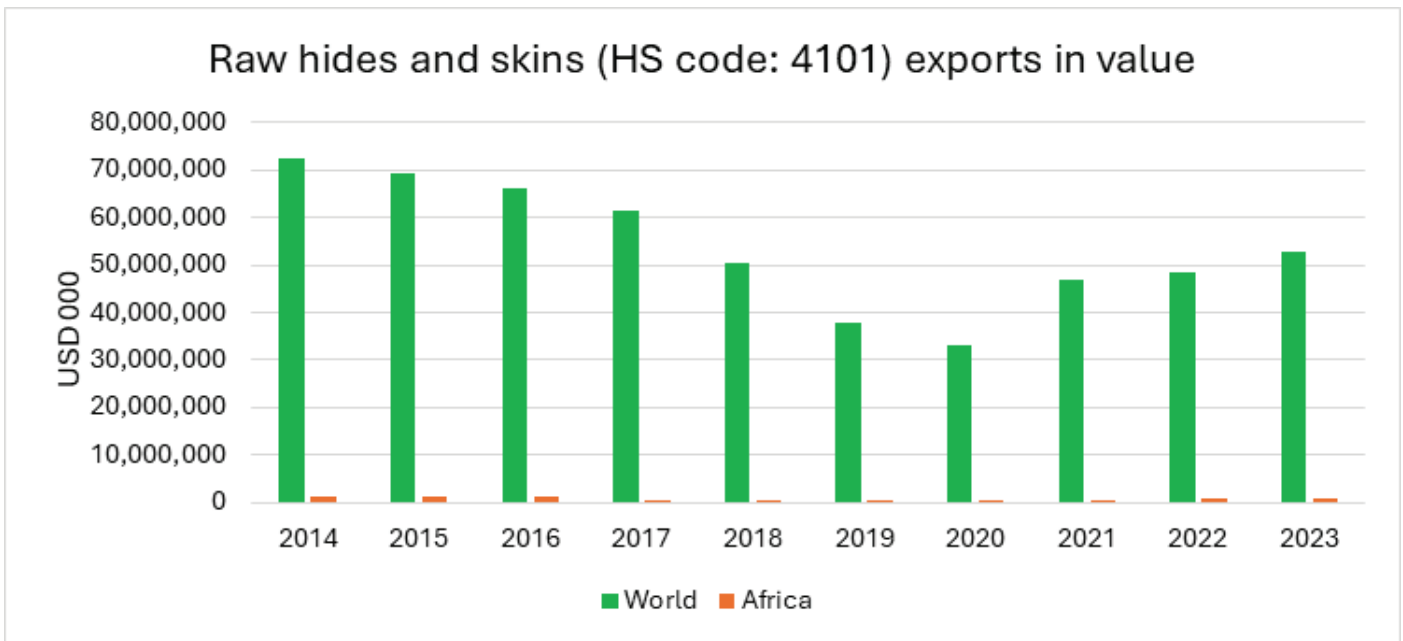


Figure 13: raw hides and skins exports by Africa vs the world

Source: Trade Map (2025)

Africa's hides and skins imports

Figure 14 presents Africa's hides and skins imports from 2014 to 2023 in value (Rand). While the global hides and skin industry declined noticeably over the years with 2020 being the lowest over the observed period, it has been recovering. In 2023, Africa imported hides and skins valued at R2.0 billion which is almost insignificant when compared to the R28.1 billion for Asia or R23.4 billion for Europe for the same year.

Nigeria is the region's leading importer, importing at least R1.7 billion which is equivalent to 85% of all Africa's raw hides and skins imports in 2023. In the second place was Egypt with a share of 7% followed by Uganda (3%), Kenya (1%), Tunisia (1) and Ghana (1%). Other countries such as South Africa, Benin, Congo, Sierra Leone are importing hides and skins, but it's in insignificant amounts.

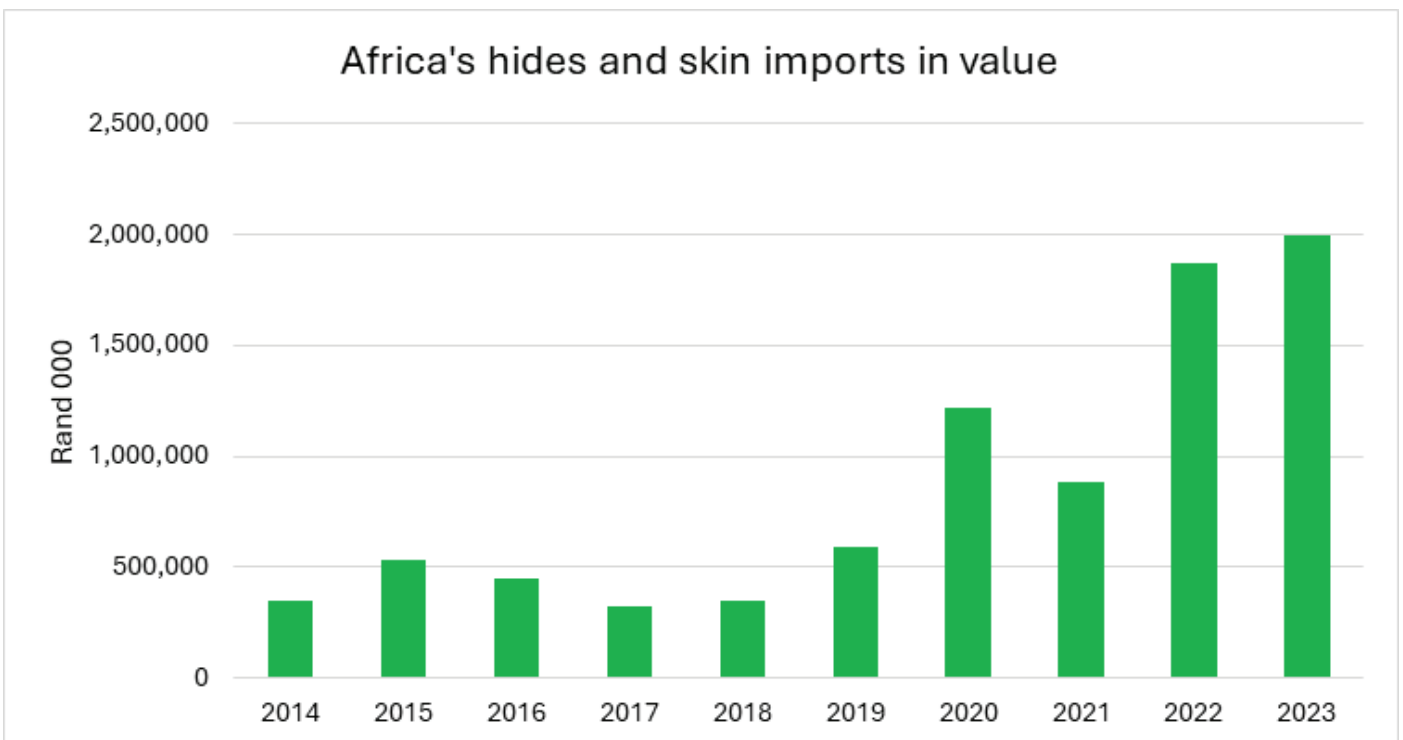


Figure 14: Africa's raw hides and skins imports from 2014 to 2023

Source: Trade Map, 2025

Africa's top hides and skins exporters

Figure 15 presents Africa's top hides and skins exporters in value (Rand) from 2014 to 2023. Of the Africa's leading cattle producers, South Africa a small producer when compared to the likes of Ethiopia, Kenya, Sudan or Tanzania is the leading exporter of raw hides and skins in Africa. Based on trade map data, in 2023, in value

(Rand), South Africa accounted for 43% (R299.8 million) of R691.4 million worth hides and skins exported by Africa. South Africa was followed by Sudan (16%) (R107.7 million), Tanzania (12%) (R84.3 million), Kenya (7%) (R46.3 million), Rwanda (5%) (R40.8 million), Tunisia (3%) (R36.5 million) and Libya (2%) (R1.1 million).

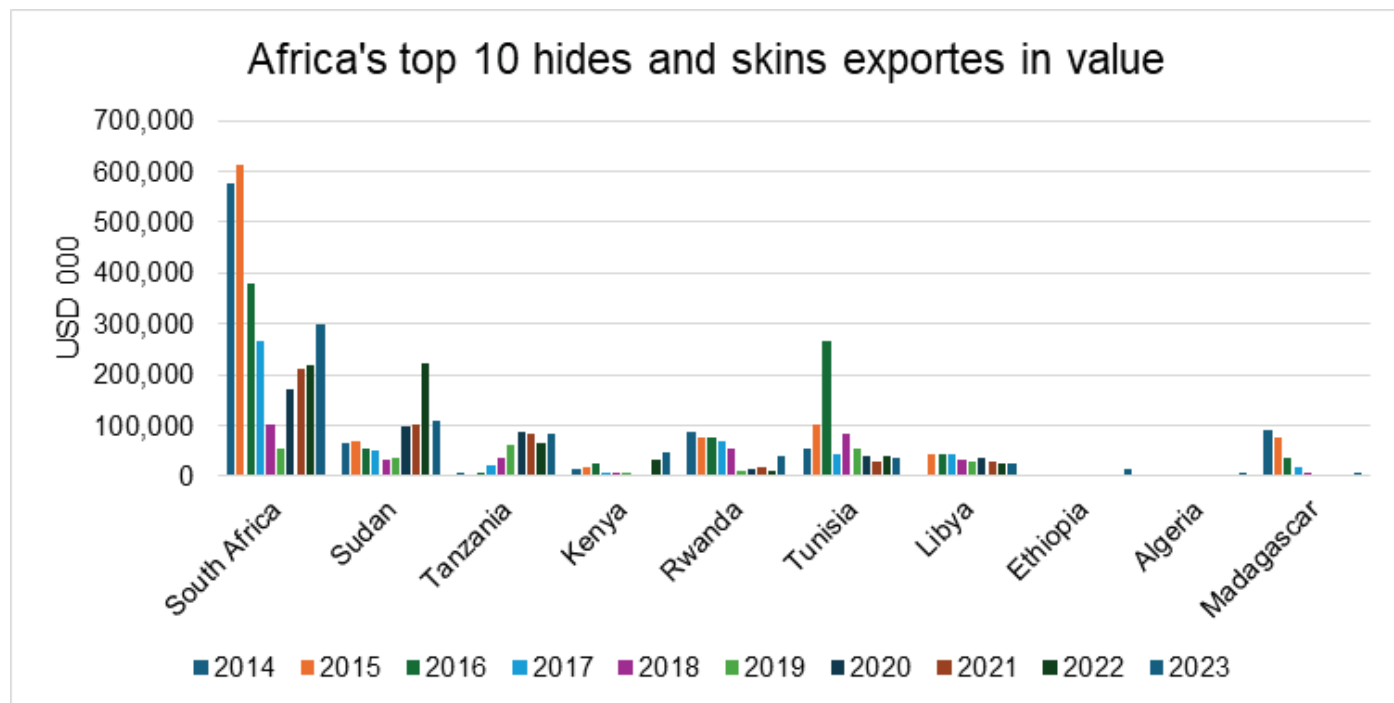


Figure 15: Africa's top 10 raw hides and skins exporters

Source: Trade Map, 2025

Closing remarks

There are a few issues with the African hide and skin industry that require attention. Africa is among the top cattle producers, in the world as was already mentioned, however when compared to Asia it's an insignificant player in exports of hides and skins globally accounting for a mere 1%, and an insignificant in imports, importing only 4% of the R56.9 billion imported in 2023. This point to various troubling realization that Africa is far away from the world in manufacturing and processing of

this industry. This trend can be observed from natural resources which Africa have in abundance but does not do value addition hence exporting jobs and most importantly not industrializing the very basic low hanging fruits agricultural related industries. African governments should think about investing in industries like the production and manufacturing of hides and skins, as the continent has one of the highest populations of young people in the world, and there is a problem with formal unemployment or vulnerable employment prospects.



Author: Mr Thabile Nkunjana is a Senior Economist under the Trade Research Unit at the National Agricultural Marketing Council. He can be contacted at thabile@namc.co.za or (012) 341 1115.



Author: Mr Malapane Thamaga is an Economist under the Agritrust Unit at the National Agricultural Marketing Council. He can be contacted at mthamaga@namc.co.za or (012) 341 1115.

SOUTH AFRICA'S AGRICULTURAL EXPORTS ACHIEVE RECORD HIGH IN 2024

South Africa's agriculture sector achieved a record high US\$13,7 billion (about R255 billion) in export value in 2024, a 3% increase on the previous year, according to data from Trade Map. An Agbiz report said that despite the mid-summer drought that hampered grain and oilseed production, robust fruit harvests, improved livestock conditions, and strong carry-over grain stocks from the previous season contributed to the sector's growth. Wandile Sihlobo, chief economist at Agbiz, told Farmer's Weekly that despite infrastructure challenges, collaboration between Transnet, the private sector, and various logistical organisations had ensured the steady flow of agricultural exports.

Available at: [South Africa's agricultural exports achieve record high in 2024](#)

AGOA IN PERIL — A LITMUS TEST FOR SA'S ABILITY TO ADAPT TO A SHIFTING WORLD ORDER



Despite recent conciliatory gestures and very diplomatic wording from South African President Cyril Ramaphosa, the Democratic Alliance and even civil rights organisations, the rift between Pretoria and Washington appears to be deepening – putting in jeopardy the African Growth and Opportunities Act (Agoa), long touted as a symbol of US-African and South African partnership. US President Donald Trump, who recently halted a near-total freeze on US foreign aid, also announced this week that the primary agency for US soft power worldwide – USAid – has all but ended its work, with all “non-essential” personnel being recalled.

His presidency's broader foreign policy appears to have taken a narrower gaze towards South Africa, with casual speculation on the influence of Elon Musk and his South African heritage, as well as Trump's spat with the country being caused by South Africa's case against US ally Israel at the ICJ, rather than merely the Expropriation Act.

Available at: [Agoa in peril — a litmus test for SA's ability to adapt to a shifting world order](#)

SA EXPORTS FIRST LEMONS OF 2025 TO INDIA

The first shipment of South African lemons for the 2025 season has arrived in India, marking an important step for the country's citrus export industry. The shipment also marks the first time FruitOne, a South African citrus cultivation and export company, has exported lemons to India. “We are delighted to announce the arrival of the first shipment of South African lemons in India for the season,” said Boitshoko Ntshabele, CEO of the Citrus Growers' Association of Southern Africa (CGA). “This shipment signifies the strong trade relationship between South Africa and India. It starts the season and hopefully also starts an era of increased exports and opportunities for our two countries.”

Available at: [SA exports first lemons of 2025 to India](#)

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FOR CORRESPONDENCE:

Dr. Solly Molepo
SMolepo@namc.co.za
+27 (0) 12 341 1115

FOR ARTICLE CONTRIBUTION TO THE TRADE PROBE:

Mr. Bhekani Zondo
BZondo@namc.co.za
+27 (0) 12 341 1115

DESIGNED BY:

Mr. Rodney Khoza
rkhoza@namc.co.za
+27 (0) 12 341 1115

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