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FOREWORD

Welcome to the hundredth and one (101st) 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 Department of Agriculture (DoA).

The focus of this issue is on leveraging South Africa's membership of the BRICS+, to expand the country's agricultural trade, global export footprint and competitiveness within the block. Given these new opportunities, it is important to explore the growing export and production opportunities, as well as trade diversion created by the introduction of new members to the block. The 17th BRICS+ Summit will be hosted by Brazil. As the Chair of BRICS, Brazil is focusing on the theme, "Strengthening Global South Cooperation for More Inclusive and Sustainable Governance". As the BRICS+ summit is set to take place on July 6-7, 2025, in Rio de Janeiro, Brazil, it is anticipated that new opportunities will emerge to strengthen agricultural trade, investment, and competitiveness within the BRICS+ economies.

Authors analysed South Africa's agricultural trade relations, propose strategies and trade arrangements for expanding market access, analysed tariff and non-tariff measures that are currently restricting agricultural trade within the BRICS+ member countries.

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AGRICULTURAL PARTNERSHIPS BETWEEN SOUTH AFRICA AND SOUTHEAST ASIA UNDER BRICS+

Buhlebemvelo Dube and **Matume** Maila

1.1 Introduction

The evolving landscape of international trade, as seen by the increasing prominence of the BRICS economic alliance, which includes Brazil, Russia, India, China, and South Africa, presents an important background for reviewing agricultural trade dynamics between Southeast Asia and South Africa. These dynamics are characterized by a complex interplay of factors, including the potential for enhanced trade flows and diversification of agricultural markets, alongside inherent challenges stemming from regulatory environments, infrastructural deficits, and the pervasive influence of global market volatility. This analysis examined agricultural trade relations between Southeast Asia and South Africa, revealing both possible opportunities and constraints in an emerging BRICS context.

1.2 Discussion

The expansion of BRICS+ is set to impact the Association of South-East Asian Nations (ASEAN) on account of Indonesia joining BRICS+. The positioning of Indonesia as a launchpad for accelerated trade is set to have an economic impact on both ASEAN and BRICS+ since it is a key member of ASEAN and is the largest economy in the Southeast Asia. ASEAN group is comprised of Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Vietnam (Council on foreign relations, 2025). Table 1 below depicts the top ten traded agricultural products by South Africa and ASEAN. The agricultural trade balance between ASEAN and South Africa is worth roughly $1.56 billion. The two partners trade significant commodities such as rice, palm oil, vegetable fats, palm kernel, and cocoa butter. South African exports to the ASEAN grouping are valued at around $5.25 billion, and there is still room to improve market access through the BRICS+ expansion to open new prospects. Raw cane sugar, fresh apples, fresh or dried oranges, fresh grapes, fresh pears and soya beans are respectively the dominant agricultural commodities South Africa exports to ASEAN.

Table 1: Major agricultural trade commodities between South Africa and ASEAN

	SA's top 10 exports		SA's top 10 imports	
	Commodity	Export value ($) 000	commodity	Import value ($) 000
1	Raw cane sugar	122 103	rice	469,929
2	Fresh apples	85 743	Palm oil	428,998
3	Fresh or dried oranges	52 442	Vegetable fats	69,777
4	Fresh grapes	35 456	Palm kernel	32,842
5	Fresh pears	30 829	Cocoa butter	27,478
6	Soya beans	25 451	Cocoa powder	18,979
7	Fresh cranberries, bilberries and other fruits of the genus Vaccinium	15 675	Pepper	10,583
8	Fresh or dried mandarins incl. tangerines and satsumas (excl. clementines)	15 496	Broken rice	8,900
9	Cotton	15 123	Pasta	8,083
10	Fresh or dried macadamia nuts, shelled	12 741	Fresh or dried cashew nuts	7,817

Source: ITC (2025)

Figure 1 below depicts a steady recovery or stabilization in trade performance of almost $36 million between 2023 and 2024, which is underpinned by improved logistics, or regional trade cooperation (e.g., BRICS+) which boosts market confidence. This is appropriate considering the potential growth of market access under the BRICS+ partnership. Furthermore, ASEAN, is forecast to experience considerably lower increases than Indonesia. This is reasonable given the strong trade relations between South Africa and Indonesia, compared with some ASEAN countries, and that it is much effortless to negotiate with a single nation than a block. Key agricultural commodities earmarked for the Indonesian and ASEAN group include fresh apples, fresh grapes, sugar cane, and oranges.

Figure 1 also predicts agricultural trade trends between Southeast Asia and South Africa, with a focus on Indonesia from 2020 to 2027. It can be observed that the agricultural exports from South Africa to Indonesia are likely to expand progressively over the next three years. The three-year forecast shows that the export will increase by almost $72.9 million between 2025 and 2027. The model predicts stable growth following the volatility witnessed between 2020 and 2024.

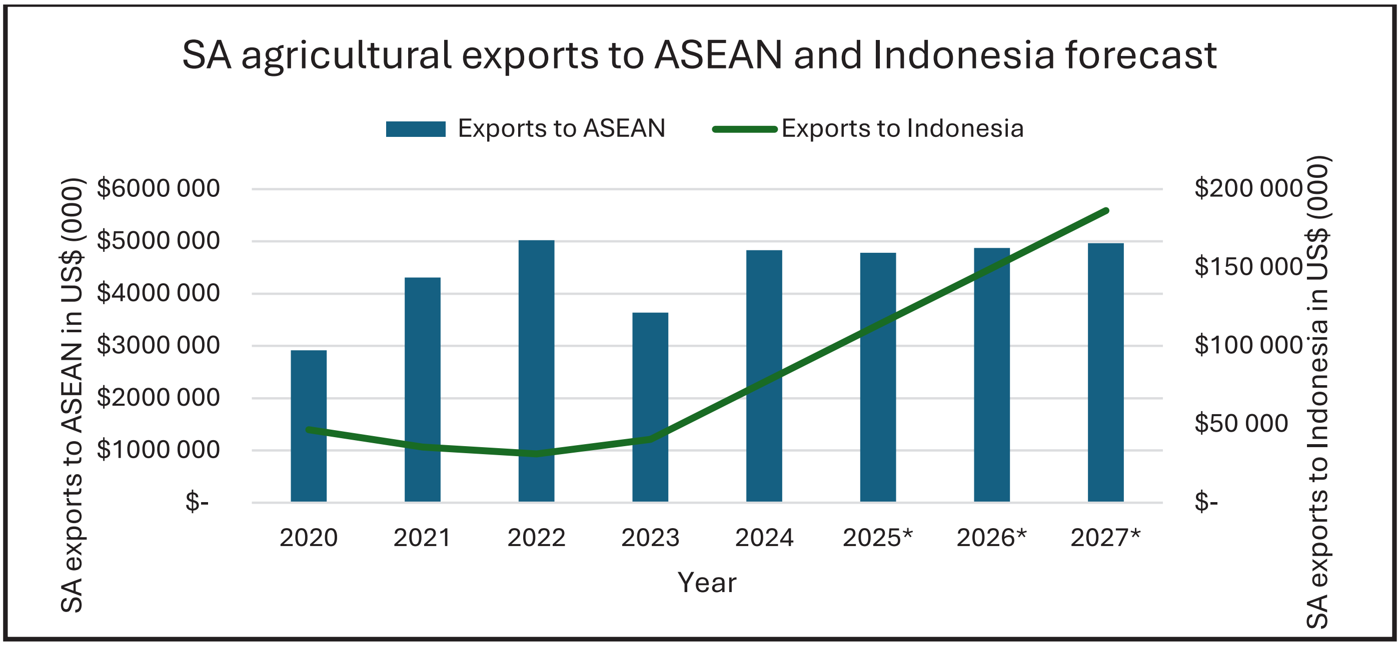

Figure 1: SA agricultural exports and Indonesia forecast

Source: ITC (2025) & NAMC calculations (2025)

Indonesia is a key market for South African fruits and sugar cane. The two partners have strong trade relationships and there is significant potential for further market access. The BRICS+ expansion will enable South Africa to develop enhanced trade facilitation frameworks with ASEAN group. This is important towards reducing the high tariff and non-tariff barriers between these partners. Furthermore, there are opportunities for Africa and ASEAN to intensify regional dialogues, with Africa already underway with its African Continental Free Trade Area (AfCFTA) agreement. These opportunities can ensure that South Africa expands market access and diversifies its export basket which is critical for sustainable growth in exports.

1.3 Conclusion

Given the varied agricultural capabilities of each region, there is clear potential for enhanced trade complementarity between Southeast Asia and South Africa. Furthermore, interest by both Malaysia and Thailand to become members of BRICS would further open market access to the Southeast Asian region for South African exporters.

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PROSPECTS TO EXPAND SOUTH AFRICA'S AGRICULTURAL TRADE WITHIN THE BRICS+ MARKET

Bhekani Zondo

2.1 Introduction

BRICS is a political and diplomatic alliance of developing markets aimed at strengthening economic, social and political ties within its members. The alliance also aims to increase the global influence of Global South countries in its international governance (BRICS, 2025). Initially, the group consisted of five member countries, viz., Brazil, Russia, India, China, and South Africa. However, following the 2023 Summit held in South Africa, the group expanded its membership to include Egypt, United Arab Emirates (UAE), Ethiopia, and Iran. In 2023, the BRICS bloc also extended an invitation to Saudi Arabia to join this alliance; however, the Saudi government is still assessing this request.

Among the main priorities of the Brazilian presidency of the 2025 summit is to facilitate economic transactions between the member states using local currencies and promoting trade facilitation measures. This presents prospects for also expanding agricultural trade within this market. Hence, the aim of this article is to analyse the current trade trends within this market and prospect for increasing South Africa's agricultural exports.

2.2 Intra-BRICS+ agricultural trade

In terms of the trade of agricultural products, in 2022, BRICS aggregation exported a value of approximately US$382 billion, accounting for about 7% of the world exports of agricultural products; while imports were valued at about US$380 billion (8%) (Trade Map, 2025). Soya beans were the leading exported products with a share of 11% of the total exports by the BRICS member states, followed by palm oil (5%), raw sugarcane (4%), coffee (4%), frozen beef (4%), milled rice (3%), and oilcake (3%), among others. Whereas the leading imports of agricultural products by the BRICS market from the world were soya beans (15%), frozen beef (4%), food preparations (3%), palm oil (2%), raw sugar cane (2%), maize (2%), and wheat and meslin (2%), milled rice (2%), crude palm oil (2%), and cotton (2%). Figure 2 below depicts the outlook of intra-BRICS agricultural trade performance over the years from 2014 to 2024.

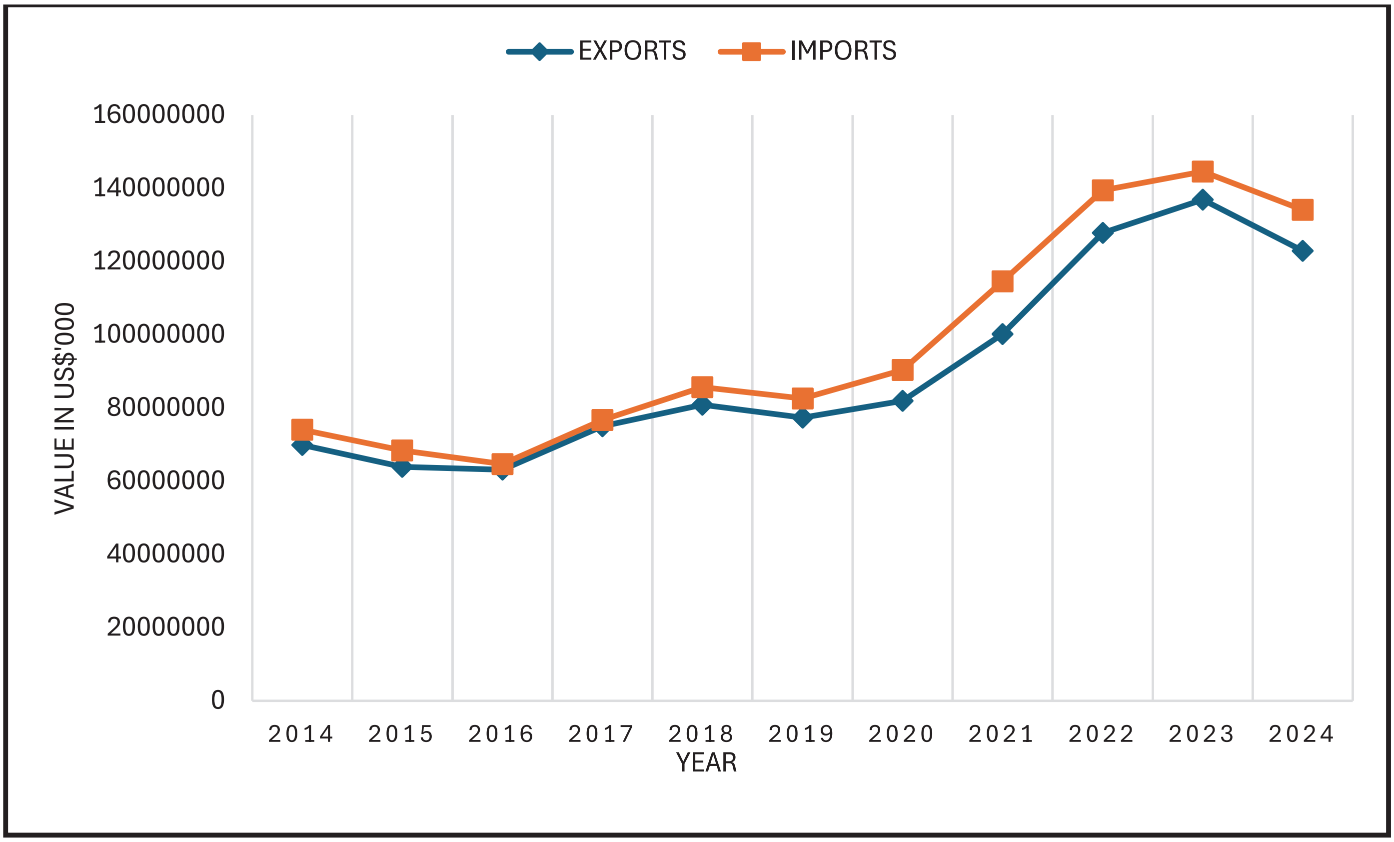

Figure 2: Outlook of intra-BRICS agricultural trade performance

Source: Trade Map (2024)

Agricultural trade within the BRICS member countries has increased significantly over the years. The overall value of agricultural exports increased by 76% and imports by 81% between 2014 and 2024. Although both agricultural exports and imports within this market have seen significant growth, over the years, imports always exceed exports; hence, intra-BRICS agricultural trade always has a negative trade balance. In 2024, the trade balance of intra-BRICS agricultural trade was negative US$11.2 billion. China is currently the leading importer of agricultural products within this market, accounting for a share of 52% of overall imports within the BRICS countries followed by India (10%), Saudi Arabia (9%), and UAE (8%), Indonesia (8%), and Russia (5%). Whereas the leading exporters of agricultural products are Brazil (53%), Indonesia (14%), India (10%), China (8%), and Russia (8%).

The leading traded commodities within these countries are soya beans, frozen boneless beef, raw sugarcane, palm oil, frozen chicken meat, maize, milled rice, oilcake, crude sunflower oil, and cotton, among others.

2.3 South Africa's agricultural trade within BRICS+

Figure 3 below illustrates South Africa's agricultural trade performance within BRICS. The data depicts that both South Africa's agricultural exports and imports have been exhibiting a positive trajectory over the period under consideration. South Africa's agriculture exports grew by 86% between 2014 and 2024 while imports grew by 28%. Between 2014 and 2017 recording negative trade balance with imports exceeding exports to the region. However, from 2018 to 2021 and 2023, South Africa's value of agricultural exports exceeded the value of imports from this market. Although, the country recorded a negative trade balance in 2024, over the years the rate of growth of agricultural exports exceeds that of imports. Hence, the notable decline in trade balance. South Africa's main exported agricultural products to the BRICS market are oranges, wool, nuts, soft citrus, macadamia, pome fruits, lemons, grapes, grapefruits, boneless beefs (fresh, chilled or frozen), among others.

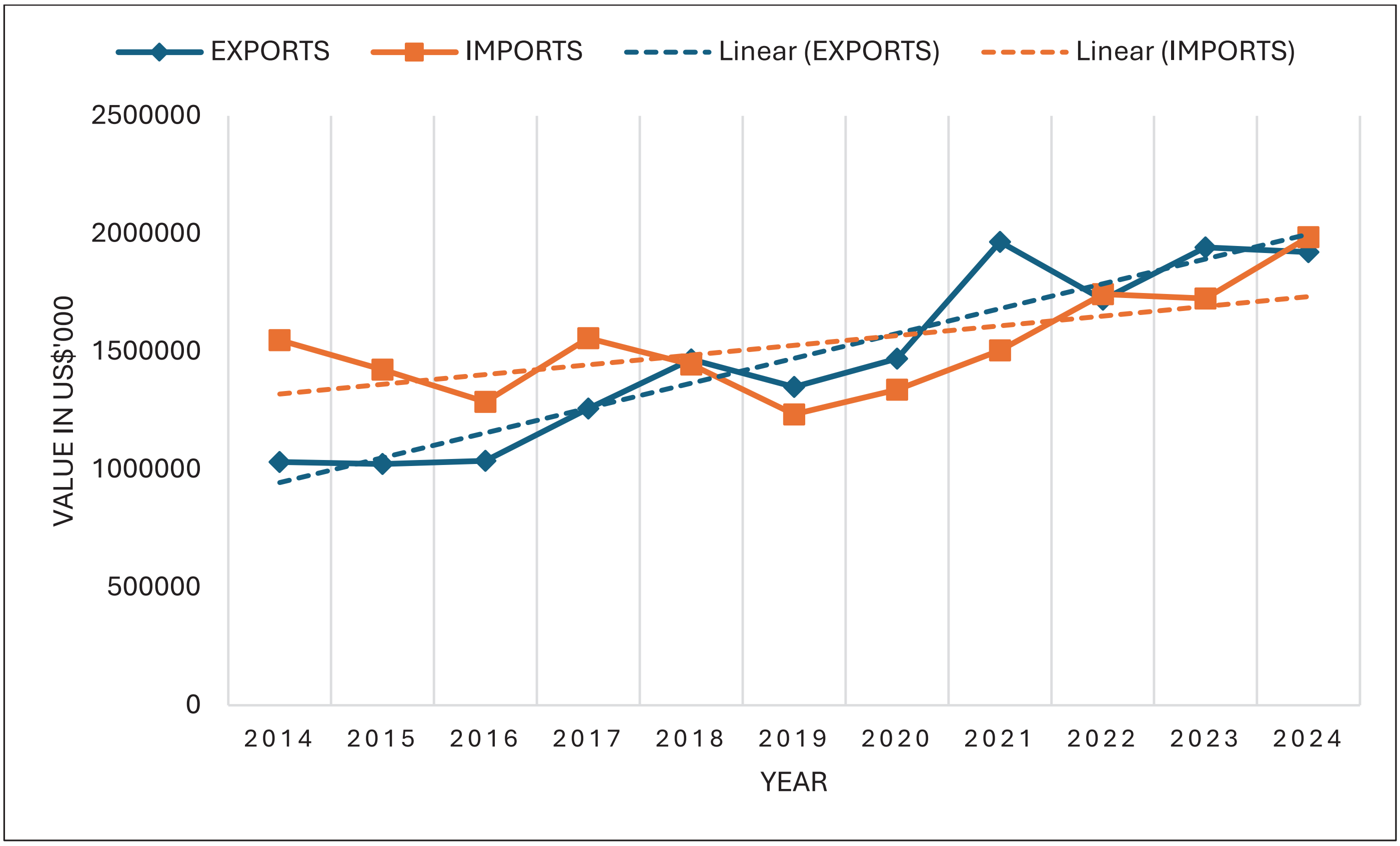

Figure 3: Outlook of South Africa's agricultural trade performance within the BRICS market

Source: Trade Map (2024)

2.4 Conclusion

The expansion of the BRICS alliance with the addition of new members presents promising opportunities for South Africa to deepen and diversify its agricultural trade. With this market showing robust growth in intra-member state agricultural trade and a clear agenda to promote local currency transactions and trade facilitation, South Africa stands to benefit from enhanced market access and reduced trade barriers. South Africa's agricultural exports have exhibited a strong upward trajectory, outgrowing import growth and indicating growing competitiveness in the region. South Africa is a key exporter of some of the high demand commodities within this market; these are: soya beans, frozen boneless beef, raw sugarcane, maize, and cotton. Therefore, by leveraging its strengths in these key export commodities and aligning with the evolving trade dynamics of the BRICS+ market, South Africa is well positioned to expand its agricultural footprint and contribute meaningfully to the bloc's regional economic integration and prosperity.

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BRICS+ PRESENTS AN OPPORTUNITY TO INCREASE SOUTH AFRICA'S AGRICULTURAL EXPORTS

Thabile Nkunjana

3.1 Introduction

Although BRICS is not a trade bloc, South Africa can strategically promote its trade interests through its economic cooperation arrangement. This grouping is of significance to the agriculture industry, primarily for expanding exports into China and India. Farmers and export companies in South Africa wish to join the large number and value of agricultural products that these countries including new members already import from the global market.

3.2 BRIC (Brazil, Russia, India, and China) agricultural imports from the world

Based on trade map data, the BRIC countries agricultural imports amounted to R4.9 trillion in 2024. Between 2020 and 2024, over the past 4 years, BRIC countries agricultural imports averaged R4.5 trillion, increasing by 40% during the same period. Overtime, India's agricultural imports have increased by 99% while Brazil's (60%), and China (39%). Russia is the only country that saw a decrease of this grouping in its imports which could be attributed to the economic hardship after the sanctions related to the conflict in Ukraine, decreasing by 13% from R452.9 billion in 2020 to R391.9 billion in 2024 (Trade map, 2025). China imported R3.6 trillion worth of agricultural products in 2024, compared to R702.3 billion, R392.9 billion, and R265.5 billion for Brazil, Russia, and India (as previously mentioned) (Trade map, 2025).

Soybeans, cotton, cattle, maize, fresh cherries, tobacco, wool, grain sorghum, edible pig offal, and wine are among the top imports from China. Sugar, cashew nuts, pigeon beans, almonds, cotton, dry beans, whisky, apples, and soybeans are some of India's top agricultural imports. Malt, virgin oil, milk, wine, preserved potatoes, soybeans, apples, maize, barley, whisky, garlic, cheese, cattle, pears, and other dairy goods are among Brazil's top agricultural imports.

South Africa currently exports a portion of the aforementioned products to these markets, although this differs throughout these countries due to a number of variables, including higher tariffs. With an average of 8% over the last ten years in total agricultural exports of US$10 billion, BRIC countries make up a very minor portion of South Africa's agricultural exports as of 2023. With an average of 5% of South Africa's agricultural exports going to BRICS countries, China is the top market. Wool, citrus, meat, almonds, and grapes were the most popular products. India and Brazil imported very little South African agricultural products, whereas Russia was the second-largest market in the BRICS, with an average of 2%. Top items were citrus, apples, pears, grapes, and wine (Trade map, 2025).

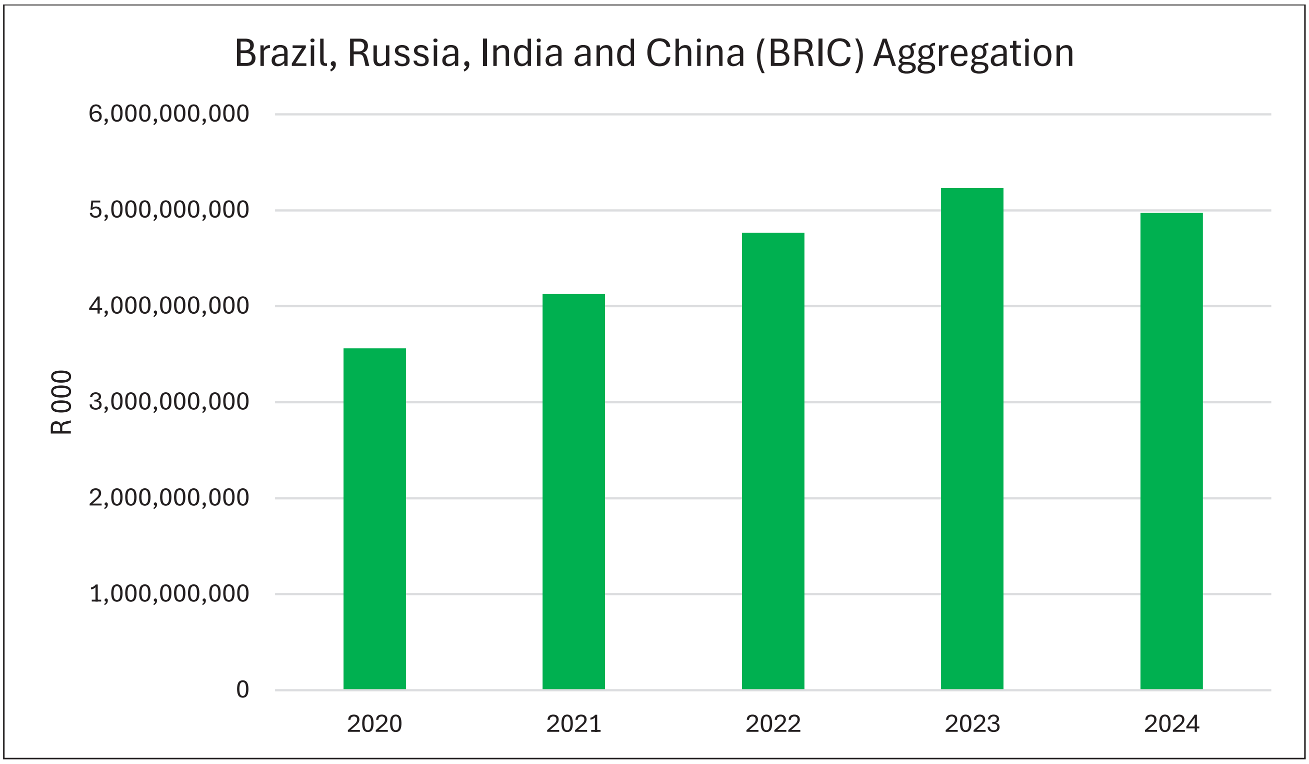

Figure 4: BRIC (Brazil, Russia, India & China) agricultural imports from 2020 and 2024

Source: Trade Map, 2025

3.3 South Africa's top exportable agricultural products

South Africa's top exportable agricultural products in 2024 were apples ($575.1 million), oranges ($774.0 million), and mandarins ($588.1 million). Maize had an export value of $818.8 million, or R14.9 billion, up 36.8% year over year. Among other noteworthy products, South Africa exports wine, avocados, lemons, wool, and sugar. These are products that the country should explore markets for within the BRICS+ grouping.

3.4 Conclusion

Promoting agricultural exports, particularly to China and India, is the primary goal of South African agriculture and agribusiness in the grouping. These are countries with sizable populations and comparatively strong economic growth prospects, which translate into sustainable marketplaces. Due to its location in the southern hemisphere, Brazil frequently competes with South Africa in major agricultural commodities, whereas Russia is a significant producer of wheat and a significant market for South African fruit.

The BRICS+ offers more potential markets because of the recently joined BRICS countries and over the coming years, these new additions on BRICS+ should be South Africa's targets through bilateral trade agreements. In recent years, a variety of South African agricultural products have found greater market access in Saudi Arabia and Egypt. South Africa should pursue bilateral trade deals with these new BRICS+ members in the upcoming years and the coming BRICS summit in Brazil presents an offer for this.

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ANIMAL HEALTH AND TRACEABILITY COULD UNLOCK SOUTH AFRICA'S BEEF EXPORT POTENTIAL IN BRICS+

Siphelele **Ricardo** Smith

4.1 Introduction

South Africa's beef industry has a potential to become a competitive player in international trade. In 2024, South Africa's beef exports experienced significant growth, with cumulative exports reaching 38,657 tonnes, a 30% increase from 29 718 tonnes in 2023 (RMIS, 2024). Despite this progress, the industry continues to face challenges, including disease outbreaks in provinces like Gauteng, KwaZulu-Natal and the Eastern Cape. Since 2021, South Africa has recorded a total of 207 Foot-and-Mouth Disease (FMD) outbreaks. As of March 2025, three new outbreaks were reported in KwaZulu-Natal, increasing the province's total to 167 outbreaks. Out of 167 outbreaks, 149 were open and 18 were closed. The Eastern Cape has not reported any new outbreaks since September 2024 (DALRRD, 2025a). Recently, China has suspended beef imports from South Africa due to ongoing concerns over FMD outbreaks, posing a significant setback for the country's beef exports.

Figure 5 shows the importing markets for South Africa's beef exports in 2024, in value terms. Key export markets included Jordan, United Arab Emirates (UAE), Kuwait, Mozambique, Qatar, Lesotho, Saudi Arabia and Mauritius. Notably, three of the top 10 importers, UAE, Saudi Arabia, and Egypt are BRICS+ members, highlighting the importance of this bloc in South Africa's beef trade. The BRICS+ markets offer a dynamic landscape for South Africa's beef exports, driven by rising demand and shifting trade relations. In 2024, Saudi Arabia lifted a 20-year ban on South African meat products, indicating a renewed trade momentum (The DTIC, 2024). China, the world's largest beef importer with total beef imports reaching USD 790.873 billion in 2024, is one of the markets with the greatest potential for South Africa's beef exports (Trademap, 2025). However, to fully seize these opportunities, South Africa must address persistent animal health and traceability gaps that limit access to these markets. A coordinated national strategy focused on veterinary infrastructure, biosecurity, and digital traceability systems is essential to build global confidence in the country's beef supply chain.

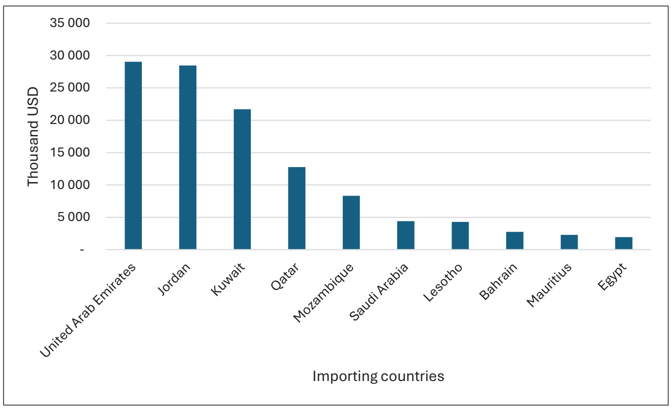

Figure 5: Importing markets for South Africa's beef (HS: 0201) exports in 2024

Source: Trademap, 2025

Disease outbreaks in 2021 and 2022 resulted in a decline in the number of cattle slaughtered in 2023. In 2024, improved biosecurity measures contributed to a 3% increase in cattle slaughter, rising to 3.253 million head from 3.147 million in 2023 (DALRRD, 2025b). The Department of Agriculture, in collaboration with the Department of Science, Technology & Innovation and private sector partners, committed to contribute R10 million to the National Biosecurity Hub Programme. For markets like China, where South Africa competes with Brazil and Australia, aligning with World Organisation for Animal Health (WOAH) standards is critical to prevent disruptions. India's high tariffs and non-tariff barriers restrict access. In India, stringent health certifications are essential to meet import requirements, despite cultural sensitivities around beef.

Reviving local animal vaccine production and increasing funding for veterinary services are critical to combat diseases such as Foot-and-Mouth Disease (FMD) and brucellosis. These interventions would boost exports, improve market access, and strengthen the resilience of the livestock sector to both environmental and disease-related shocks. Traceability is equally important, providing transparency that resonates with BRICS+ consumers. China's market values verifiable supply chains to ensure safety and sustainability, while the UAE and Saudi Arabia demand Halaal-compliant, traceable products. South Africa's traceability systems are evolving. In 2024, the Red Meat Industry Services (RMIS) launched a pilot phase of its Mobile Processing Units (MPUs), during which over 2,000 cattle were processed across various emerging farms and communal dip tank, improving small-scale farmers' market access. The MPUs are designed to bring essential livestock services such as tagging, branding, dehorning, and vaccinations (RMIS, 2025). However, scaling up digital solutions like blockchain is essential to match competitors like Australia, which leverages advanced traceability to dominate China's fresh beef sector.

4.2 Conclusion

South Africa's beef industry can capitalize on the growing opportunities within BRICS+ markets by addressing critical challenges in animal health and traceability. Investments in biosecurity, local vaccine production, and digital traceability systems, such as blockchain, will ensure compliance with stringent international standards, like those of the World Organisation for Animal Health (WOAH) and the specific demands of markets like China, the UAE, and Saudi Arabia. Collaborative efforts across government, industry, and private sectors will position South Africa as a leader in high-quality beef exports. This coordinated approach will drive economic growth, enhance the resilience and global reputation of South Africa's livestock sector.

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SOUTH AFRICAN CITRUS EXPORTS TO THE EXPANDED BRICS+: OPPORTUNITIES, CHALLENGES AND STRATEGIC PATHWAYS

Bernard Manganyi and **Thulani** Ningi

5.1 Introduction

South Africa's citrus industry plays a vital role in the country's agricultural economy, generating significant income and employment. In 2023, citrus exports earned R33.9 billion (about $1.8 billion) and supported substantial jobs (CGA,2024). This contribution makes citrus one of the top agricultural exports. South Africa aims to export 260 million cartons of citrus by 2032. BRICS is increasingly emerging as a formidable global force, accounting to 42% of the world's population of over 3.6 billion people and occupying 26% of the world's landmass. Together, BRICS countries account for approximately 30% of global GDP (BRICS Business Council, 2024). New members such as Egypt, Ethiopia, Iran, the UAE, and Indonesia offer South Africa more options to diversify its citrus markets. However, trade barriers, logistical issues, and geopolitical tensions can complicate access to these markets (WTO and ITC, 2023). This article examines the current export situation, identifies challenges, and suggests strategies for South Africa to increase its citrus trade benefits within the BRICS+ framework. The article focuses on citrus export data from 2018 to 2024 to ensure a relevant and updated analysis that reflects recent trade dynamics, including pre- and post-COVID-19 impacts, shifting geopolitical relationships, and the expansion of the BRICS bloc. This seven-year (2018-2024) window captures both structural trends and short-term fluctuations, offering a robust basis for evaluating emerging market potential and policy implications within the BRICS+ framework.

5.2 The current citrus export landscape within BRICS+

South Africa's citrus trade within BRICS+ countries can be grouped into three tiers based on export volume and potential as shown in Table 2. The top-tier markets include countries such as Russia, the UAE and China. In 2024, Russia imported about $149.8 million of citrus products, up from $114.2 million in 2018, despite ongoing Western sanctions (Trade Map, 2025). These exports are largely redirected from the EU. The UAE, serving as a key redistribution hub through the Jebel Ali Port, received $163.9 million in citrus in 2024. In contrast, China's imports declined from $148.6 million in 2018 to $87.7 million in 2024, due to strict phytosanitary regulations and rising domestic competition.

	Importers	2018	2019	2020	2021	2022	2023	2024	Change (2018-2024)
Top-tier	UAE	94 330	88 876	126 703	138 805	136 595	172 189	163 860	74%
	Russia	114 236	91 600	125 261	129 215	138 655	146 267	149 829	31%
	China	148 563	103 556	96 146	119 431	132 693	106 994	87 664	-41%
Mid-tier	Saudi Arabia	83 373	87 342	74 381	77 722	64 930	56 630	62 969	-24%
	India	8 052	7 423	8 652	16 805	21 496	24 230	27 346	240%
	Indonesia	3 717	3 348	915	2 142	2 119	3 037	3 327	-10%
Low-tier	Brazil	0	0	116	NA	81	111	108	0%
	Ethiopia	64	93	22	49	72	71	78	22%
	Iran	58	0	71	80	34	114	NA	0%
	Egypt	0	0	0	NA	NA	NA	NA	NA

NA-Missing data

Source: Trade Map (2025)

The mid-tier or emerging markets such as India offer growing potential. Citrus exports to India grew from $8.1 million in 2018 to $27.3 million in 2024 due to a rising middle class and changing consumer preferences. However, a 30% import duty on oranges is a significant barrier, although ongoing talks under the SACU-India framework offer hope for change. Saudi Arabian citrus imports decreased from $87.3 million in 2019 to $63 million in 2024. This decline may indicate a need for South Africa to adapt to local policies and tax changes. Iran's trade is unstable due to geopolitical issues, but it offers potential for South Africa to develop relationships. The lower-tier or underutilized markets like Brazil, Egypt and Ethiopia remain largely untapped. Despite being a BRICS member, Brazil imported only $111,000 worth of citrus in 2023 due to protective trade rules. This indicates an opportunity for South Africa to engage with Brazil more actively. Egypt shows minimal engagement, and Ethiopia imported only $78,000 in 2024. These figures suggest that there is untapped potential in these markets that South Africa can explore further

5.3 Challenges Facing South African Citrus in BRICS+ Markets

South African citrus exports face various challenges in BRICS+ countries. For example, China has strict cold treatment rules that increase costs by 15-20%. India requires fumigation for certain citrus types, which raises export costs. Russian customs inspections can cause delays and administrative challenges. Geopolitical issues related to sanctions on trade with countries such as Russia and Iran complicate payment processes and increase costs. Additionally, U.S.-China tensions can lead to secondary sanctions affecting re-exports.

Port congestion, especially at Durban Harbour in South Africa, can cause delays of up to three weeks during peak seasons, which risks product quality (CGA, 2024).

5.4 Strategic Pathways for Market Expansion and Risk Mitigation

To fully capitalize on BRICS+ trade opportunities, South Africa must adopt differentiated strategies for each market. In Russia, it is essential to strengthen alternative payment systems and diversify logistical routes, including transit through Türkiye and Iran, to avoid chokepoints. For India, concerted lobbying for tariff reductions under the SACU-India trade talks is necessary, while simultaneously positioning South African citrus as a premium product that can compete with Spanish imports. The UAE should be leveraged as a direct market and as a logistical hub facilitating entry into harder-to-reach regions such as Saudi Arabia and Iran. Strengthening partnerships with ports and cold-chain logistics operators in Jebel Ali can reduce spoilage and improve time-to-market. In the case of China, long-term efforts should focus on negotiating relaxed phytosanitary requirements, potentially under BRICS agricultural cooperation platforms. Assuming the 2025 BRICS chairmanship, Brazil provides an opportunity to address Mercosur protectionism through bilateral trade engagements. Moreover, intra-African opportunities should not be overlooked. Once fully implemented, the African Continental Free Trade Area (AfCFTA) offers tariff-free access to markets such as Ethiopia and Egypt, but this requires significant investment in cold-chain infrastructure and regional logistics.

5.5 Conclusion

As BRICS+ evolves into a powerful global trading bloc, South Africa's citrus sector is well-positioned to benefit, if it can strategically overcome trade, logistical and regulatory hurdles. By aligning export strategies with specific market conditions, lobbying for better trade terms, and investing in infrastructure, South Africa can not only safeguard but also expand its citrus footprint across the Global South. With the right interventions, BRICS+ could be the key to a more resilient and diversified citrus export future.

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POLICY GAPS AND OPPORTUNITIES FOR AGRICULTURAL TRADE NEGOTIATIONS WITHIN BRICS PLUS: FOCUS ON SOUTH AFRICAN BEEF TRADE PERFORMANCE

Lucas Moswane

6.1 Introduction

The production of beef in South Africa has been fluctuating for the past 10 years. The peak of the production was experienced in the year 2016 where 1 089 686 tons of beef was produced (RMIS, 2024). This was followed by a very steep decline in the country's production the year 2017, the decline was partly attributed to the following: (i) persistent high prices of feed which resulted in lower stocking density of the feed lots (ii) the outbreaks of the foot and mouth disease in some parts of the country; (iii) the limited availability of the vaccine capacity; and (iii) the season of dry weather experienced in the 2018/2019 period that has also exacerbated the situation, were some of the herds had to be closed down leading to even more lesser number of cattle available (RMIS, 2024). However, in the year 2019 the production has continuously experienced a slight growth, but this growth has not exceeded the peak of the year 2016. This growth was partly influenced by the imports of live cattle from Namibia and Botswana as well as the rebuilding of the feedlots. The South African beef production trend for the past decade is presented in **figure 6.**

South Africa can harness the joint declaration signed by the ministers of agriculture from the BRICS member countries under the BRICS Agriculture Working Group (BAWG) to improve the beef production in the country. The declaration has stressed on the importance of BRICS countries playing a role in enhancing an inclusive and sustainable growth of agricultural productivity on a global scale by matching the needs of the small-scale farmers with the industrial capacities. The working group encourages the members to pursue research collaborations and joint ventures within the group and voluntarily exchange technology and innovations in a bid to improve the agricultural productivity (BRICS, 2025).

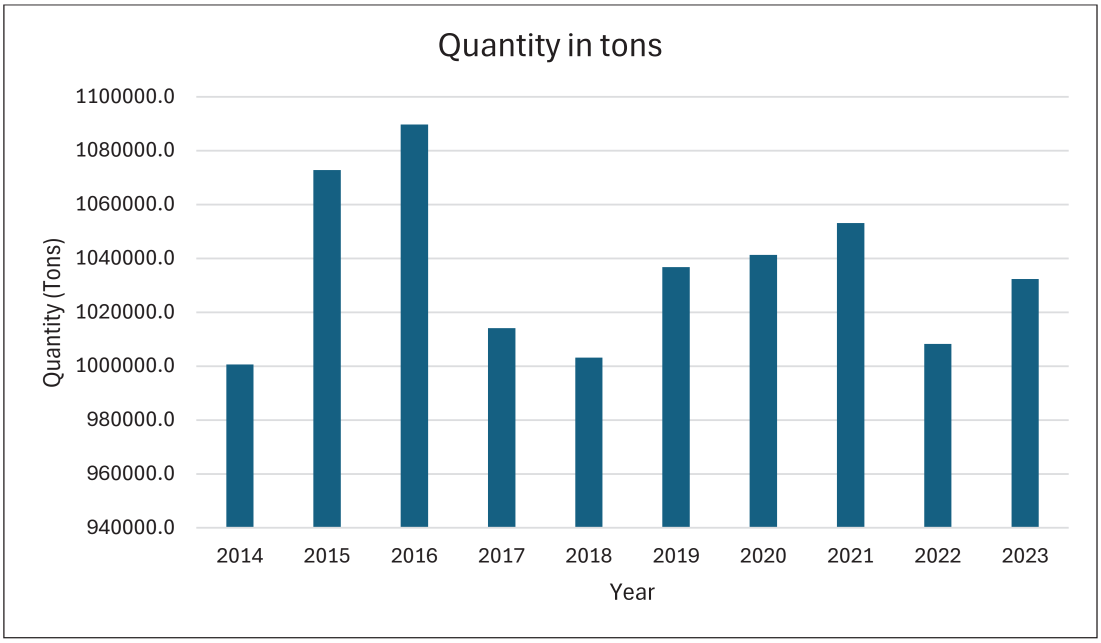

Figure 6: Production of fresh or chilled beef in South Africa for the past decade.

Source: (FAOSTATS, 2025)

The South African beef trade performance has not been doing well in the past years, and this was partly due to lapses in biosecurity aspects such as foot and mouth disease that has led to an imports ban of beef by countries like China which is one of the biggest consumers and importers of beef in the world. However, the imports ban of beef that was imposed by China has been lifted and the export value of the South African beef exports to the world has increased significantly by 53% between the year 2020 and 2024. Inadequate infrastructure and limited veterinary services make it difficult for some of the producers to meet sanitary regulations and standards imposed by some of the member states of BRICS and this turns out to compromise the competitiveness of the South African beef on the global stage. The expansion of BRICS will provide market access opportunities for the South African beef trade due to an increase demand especially with the potential inclusion of Saudi Arabia which has just lifted its 20-year ban on the beef imports from South Africa.

6.2 Conclusion

The sustainable livestock development that is advocated by the BRICS Agricultural Working Group in their 2025 joint declaration may provide opportunities for South Africa to improve market access to BRICS+ countries. The objective is to prioritise adoption of more advanced technologies, feed formulation as well as disease control and prevention with collaborative efforts focusing on the development of laboratories for vaccine production and storage as well as the veterinary services. This initiative will enable the beef producers to adequately meet the sanitary regulations and standards posed by the importing countries thus eradicating some of the non-tariff barriers in beef trade. The expansion of BRICS plus provides the beef industry to diversify its market however the higher tariffs and the complex sanitary regulations that are imposed by the state members also restrain the intra trade within the group.

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WTO MEMBERS ADVANCE DISCUSSIONS ON SPECIAL AND DIFFERENTIAL TREATMENT PROPOSALS

At a meeting of the Committee on Trade and Development in special session on 22 May, WTO members continued deliberations on three Agreement-specific proposals submitted by the G-90 group. The proposals relate to the application of special and differential treatment (S&DT) under the WTO agreements on sanitary and phytosanitary (SPS) measures, technical barriers to trade (TBT), trade-related aspects of intellectual property rights (TRIPS), and trade-related investment measures (TRIMs).

G-90's push for enhanced S&DT provisions is highly relevant to South Africa's agricultural development, trade competitiveness, and food sovereignty. It offers a potential pathway to protect and promote local agriculture in the face of stringent global trade rules, while nurturing inclusive and sustainable growth in line with national priorities. South African agricultural exports especially fruit, wine, and processed foods are heavily regulated under SPS and TBT requirements in global markets, thus, if S&DT proposals are adopted, South Africa may gain flexibility in implementing these standards, or receive technical and financial support to meet them and this could enhance market access for small and medium-sized farmers and reduce the cost of compliance for exporters.

Available at: https://www.wto.org/english/news_e/news25_e/devel_22may25_e.htm

CONTAINMENT OF FOOT-AND-MOUTH DISEASE GAINS MOMENTUM

The Minister of Agriculture, John Steenhuisen, recently announced that intensified efforts by the Department of Agriculture to control and eradicate foot-and-mouth disease (FMD) are paying off with disease management areas (DMA) of two provinces soon to be lifted and an urgent order placed for much-needed vaccines to the value of R72 million. Recognising the seriousness of the FMD threat, Minister Steenhuisen delegated control efforts to the Deputy Director-General (DGG): Agricultural Production, Biosecurity and Natural Resources Management earlier this month. The office of the DDG has already engaged with veterinary services and various industry representatives to detail the actions required to curb the threat. The biosecurity, traceability and record keeping of animals bought and sold at auctions and similar industries were raised as a specific concern and this will be addressed by the department in a directive due to be published.

The FMD containment effort is crucial for stabilizing and eventually reviving South Africa's beef export trade. While the recent outbreak has harmed short-term performance due to market suspensions and lowered domestic prices, effective control measures and transparent reporting are essential steps toward regaining international trust and restoring trade flows. A sustainable and well-supported response to FMD could serve as a foundation for more resilient and inclusive growth in South Africa's livestock sector.

Available at: https://rmis.co.za/containment-of-foot-and-mouth-disease-gains-momentum/

WHAT THE BRICS COULD LEARN FROM THE AFRICAN UNION

One of the promising venues of research related to BRICS is the application of international best practices among the leading regional arrangements and multilateral organizations in rendering the bloc's operation more effective. One such idea that has been advanced recently was the creation of a BRICS Troika along the lines of how it works in the G20 as well as in several other global and regional frameworks. It looks to the approaches and practices employed by the African Union, a regional bloc that has made notable advances in recent years, becoming in 2023 a full-fledged member of the G20. The aim is to explore the approach of the African Union to coordinating the efforts of economic integration across several of Africa's regional economic communities.

BRICS+ countries, including South Africa, could adopt the African Union's model of unity and regional integration to improve collaboration and coordination. For South African agriculture, this implies valuable lessons in harmonizing policies, supporting cross-border agricultural trade, and promoting food security through collective action. By learning from AU's frameworks like CAADP (Comprehensive Africa Agriculture Development Programme), BRICS+ could enhance joint agricultural strategies, support smallholders, and boost intra-regional trade.

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