South Africa's agricultural trade in Q2 2025: Strong export growth amid emerging global trade challenges

In the second quarter (Q2) of 2025, South Africa's agricultural trade maintained its significant growth, increasing by 10% to a value of approximately US$3.69 billion increasing from a value of US$3.35 billion in the first quarter (Q1) of 2025 (see **Figure 1**). This is equivalent to a 9% year-on-year (y/y) increase from a value of US$3.37 billion in Q2 of 2024. This resulted in a 27% increase in South Africa's agricultural trade balance, mainly driven by a y/y decline of 4% in agricultural imports, although having increased by 4% over the past five years from Q2 2021. On the other hand, agricultural exports grew by 15% over the same period, albeit remaining stagnant between Q2 2023 and Q2 2024.

In Q2 2025, agricultural export growth was mainly driven by several agricultural products that were currently in season as well as high commodity prices across different regions. The Netherlands was leading export destination for South Africa's agricultural exports accounting for 11% of total value of exports, followed by United Kingdom (UK) (8%), Zimbabwe (7%), Botswana (5%), Mozambique (5%), Namibia (5%), United Arab Emirates (4%), and United States of America (USA) (4%), among others.

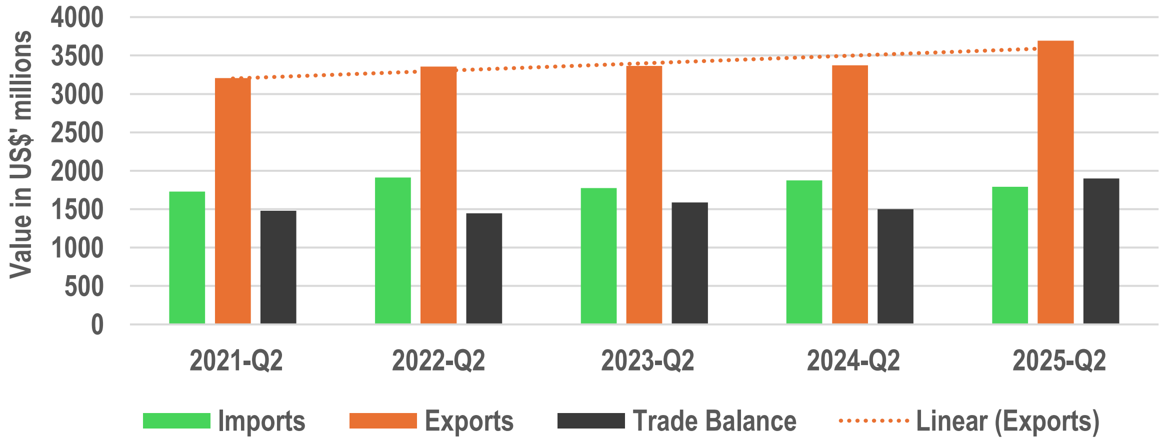

Figure 1: South Africa's Q2 agricultural products trade performance from 2021-2025
Source: Trade Map (2025)

Figure 2 below illustrates the regional distribution of South Africa's agricultural exports performance between Q2 2024 and Q2 2025. The African continent was the major export destination accounting for about 40% of total value of South Africa's agricultural exports in Q2 2025, despite increasing slightly by 2% from a value of US$1.4 billion in Q2 2024. Africa was followed by the European Union (EU) as well as Asia and Middle East with a share of 21%, followed by UK (8%), Americas (7%) with the USA specifically accounting for a share of 4% of total value of agricultural exports. During the period under consideration, the EU and USA recorded the highest y/y growth of 23% of South Africa's agricultural exports, followed by Americas (16%), the UK (13%), as well as Asia and Middle East (9%). Despite South Africa's sustained export growth over the years, the new uncertain global trade reality brought about by the new USA reciprocal tariffs will most likely have profound negative implications on agricultural exports. As the 30% reciprocal tariff came into force on the 7th of August 2025, it will be interesting to observe how South Africa's agricultural products exports will perform from Q3 of 2025 onwards.

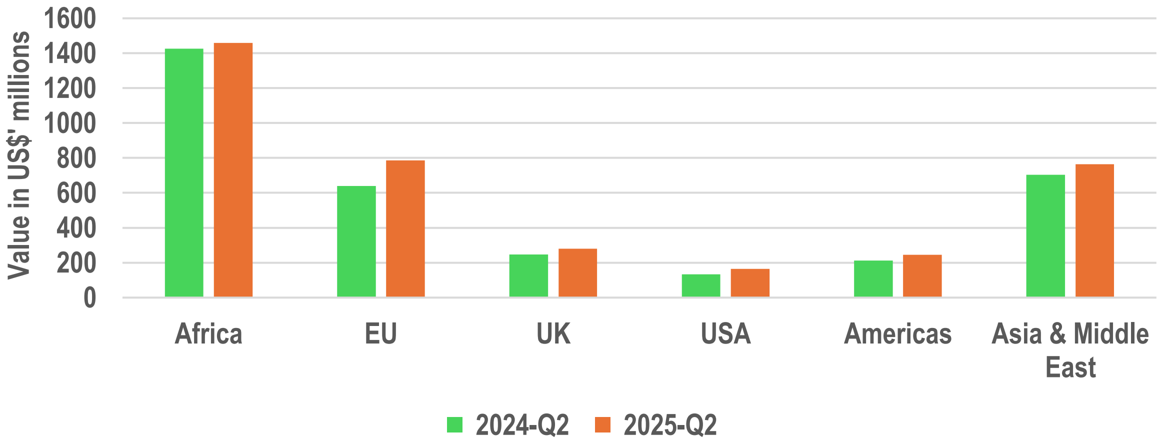

Figure 2: South Africa's Q2 agricultural products trade performance by region between 2024-Q2 and 2025-Q2
Source: Trade Map (2025)

Table 1 below presents the value and growth of South Africa's top 15 agricultural exports and imports in Q2 2025 compared to Q2 2024. The majority of the top 15 agricultural exports recorded impressive growth over this period, with macadamia nuts leading with a 92% y/y growth rate, followed by lemons (58%), oranges (41%), flavoured waters (40%), soft citrus[1] (31%), and pears (25%), among others. In addition, apples and lemons were the most exported agricultural commodities accounting for a share of 7% of total agricultural exports, followed by soft citrus (6%), maize (5%), oranges (4%), and wine and pears (3%). Despite being the most exported commodities, both avocados and maize recorded a y/y decline of 25% and 5%, respectively during this period.

In terms of agricultural product imports, there was a mixed performance with some commodities recording significant increases whereas others recorded negative growth rates, with the negative rates outweighing growth in imports of other products, hence the overall decline (4%) in agricultural imports. Wheat and meslin were the leading imported commodity with a share of 10% of value of imports, followed by palm oil (8%), rice (7%), raw cane sugar (4%), and food preparations (3%), among others. The decline in agricultural imports was mainly driven by the decline in imports of commodities such as rice (-36%), animal offal's (23%), frozen poultry meat (whole) (-23%), wheat and meslin (-11%), and whiskies (-10%), among others.

[1] Mandarins including tangerines and satsumas (excl. clementines)

Table 1: South Africa's Q2 agricultural products trade performance by region between 2024-Q2 and 2025-Q2

	2024-Q2	2025-Q2	Y/Y	% Share
Exports (US$'000)				
Total Exports	3 373 802	3 692 885	9%	-
Apples	241 614	266 562	10%	7%
Lemons	157 433	248 934	58%	7%
Soft Citrus	177 356	232 342	31%	6%
Maize	178 174	168 958	-5%	5%
Oranges	105 624	149 239	41%	4%
Wine	106 742	115 599	8%	3%
Fresh pears	76 357	95 460	25%	3%
Grapefruit & Pomelos	84 113	88 253	5%	2%
Avocados	108 092	81 111	-25%	2%
Wool	73 828	74 020	0%	2%
Dried grapes (Raisins)	50 201	59 635	19%	2%
Food preparations, n.e.s.	45 906	56 869	24%	2%
Flavoured Waters	37 267	52 118	40%	1%
Prepared Sauces	40 362	48 317	20%	1%
Macadamia Nuts	23 884	45 930	92%	1%

	2024-Q2	2025-Q2	Y/Y	% Share
Imports (US$'000)				
Total Imports	*1 874 227*	1 791 208	-4%	-
Wheat and meslin	190 265	170 186	-11%	10%
Palm oil	109 109	134 783	24%	8%
Rice	196 691	125 640	-36%	7%
Raw cane sugar	40 941	63 755	56%	4%
Food preparations, n.e.s.	54 536	59 955	10%	3%
Coffee Extracts	24 250	38 296	58%	2%
Cane or beet sugar	3 301	38 187	1057%	2%
Flavoured Waters	37 972	35 580	-6%	2%
Whiskies	38 985	35 064	-10%	2%
Coffee	22 792	31 984	40%	2%
Animal Offals (other than fish)	39 486	30 522	-23%	2%
Beer Malt	28 099	28 770	2%	2%
Animal Feed Preparations	27 075	28 075	4%	2%
Frozen Poultry Meat (Whole)	34 632	27 011	-22%	2%
Distilled Wine Spirits	25 348	26 538	5%	1%

Source: Trade Map (2025)

In conclusion, South Africa's agricultural trade performance in Q2 2025 reflects resilience and sustained competitiveness, with Q2 exports increasing by 15% and the trade balance improving on the back of reduced imports over the past five years. Seasonal production, higher commodity prices, and strong demand from key partners in Africa, the EU, and the UK contributed to this observed growth, with products such as macadamia nuts, citrus, and pears leading underscoring this growth. However, the recent introduction of the 30% USA reciprocal tariffs in August 2025 presents uncertainty on future performance, illustrating that while South Africa's agricultural exports remain robust, the coming quarters will test the sector's adaptability in navigating shifting global trade dynamics.

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