COMMENTARY

Trade Performance Brief: South Africa's agricultural trade maintained its export growth trajectory in Q3 2025

According to the latest data from the International Trade Centre Trade Map, South Africa's agricultural trade maintained its significant growth, reaching a cumulative value of US$11.7 billion in quarter three (Q3) of 2025 (Q3 2025). At this rate, the sector's export performance is likely to surpass the US$13.7 billion annual value recorded in 2024. **Figure 1** illustrates South Africa's quarterly agricultural trade performance over the past five years since 2020. Between Q3 2020 and Q3 2025, agricultural exports grew by 46% from a value of US$3.2 billion to approximately US$4.6 billion, whereas imports also grew from a value of US$1.5 billion to US$1.9 billion during this period. This is equivalent to a 13% year-on-year (y/y) increase from a value of US$4.11 billion in Q3 of 2024. This resulted in a 26% expansion in South Africa's agricultural trade balance, mainly driven by an increase in overall exports and a slight annual y/y decline of 1% in agricultural imports, although having increased significantly over the past five years from Q3 of 2020.

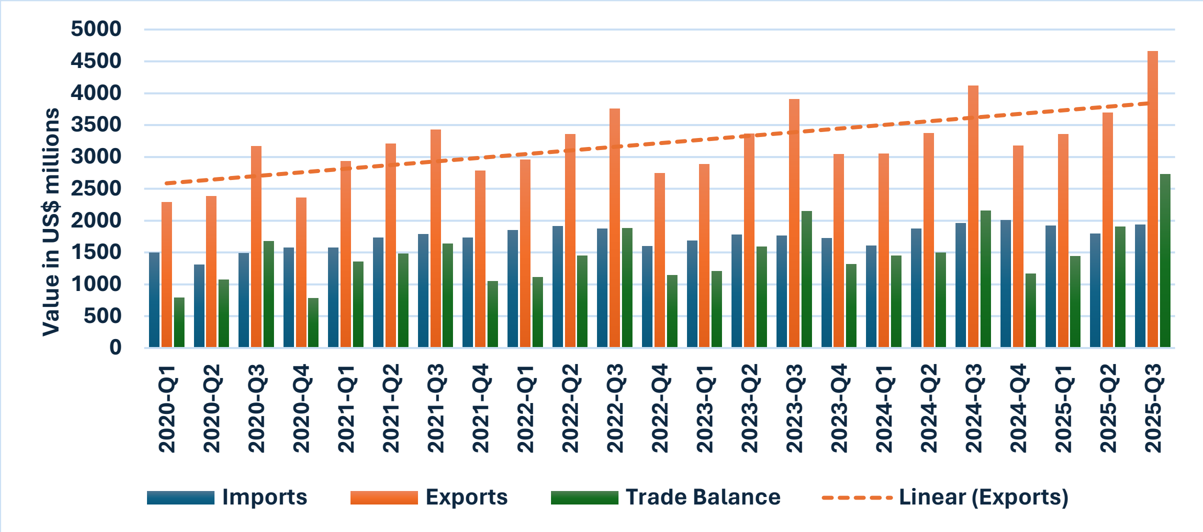

Figure 1: South Africa's quarterly agricultural products trade performance from 2020-2025
Source: Trade Map (2025)

Although South Africa exports more than 50% of its agricultural produce, the country still relies on imports to satisfy its domestic demand for commodities that are not suited to its agroecological conditions or for which the country does not yet exhibit competitive advantage in producing them. These include commodities such as rice, wheat, palm oil and chicken meat, among others. As of Q3 2025, South Africa's agricultural imports were sourced mainly from Eswatini and Thailand, who accounted for about 7% of the total value of imports, followed by Indonesia (6%) and China (6%). The other suppliers of agricultural products were the United States (U.S.), Brazil, Bulgaria, Australia, and France, all of which accounted for a share of 4% (Trade Map, 2025). In terms of exports, the Netherlands was the leading export destination for South Africa's agricultural exports, accounting for 12% of the total value of exports, followed by China (7%), United Kingdom (UK) (7%), Zimbabwe (5%), Botswana (5%), Mozambique (5%), Namibia (5%), United Arab Emirates (4%), and United States (U.S.) (3%), among others (Trade Map, 2025).

Figure 2 illustrates the regional distribution of South Africa's agricultural export performance between Q3 2024, and Q3 2025. The African continent remained the main export destination, accounting for about 34% of the total value of South Africa's agricultural exports in Q3 2025. Other main export markets were Asia and the Middle East, with a share of 21%, followed by the European Union (EU) (23%), the UK (8%), the Americas (6%) and the U.S. specifically accounting for a share of 3% of the total value of agricultural exports. Notably, agricultural exports to the U.S fell by 10% quarter-to-quarter (q/q) and an 11% y/y decline.

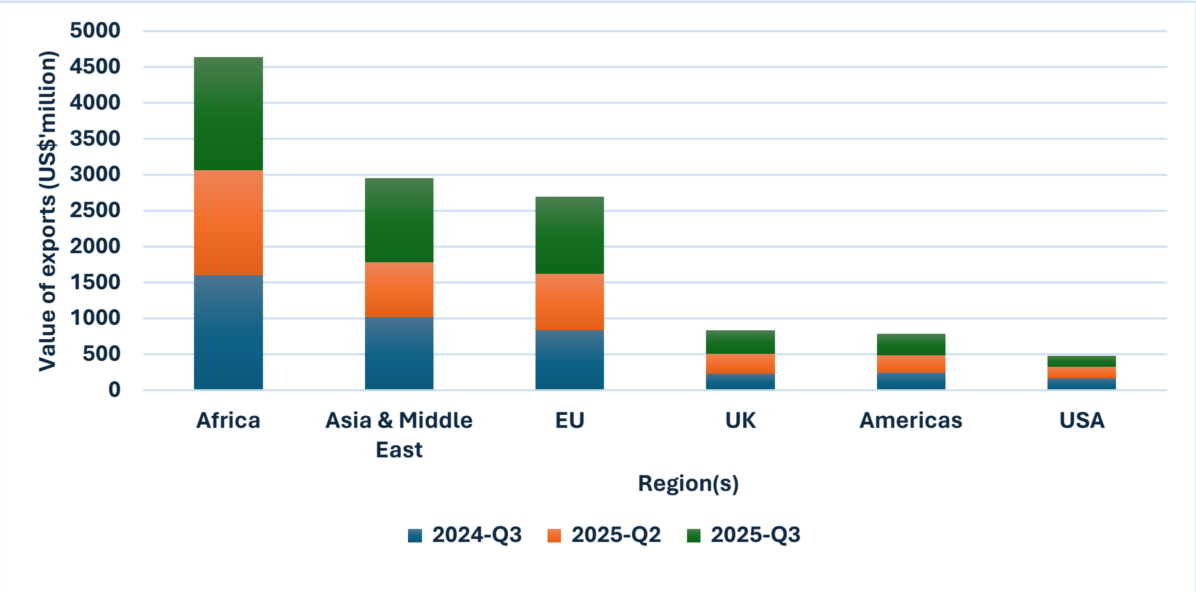

Figure 2: South Africa's quarterly agricultural products trade performance by region between 2024-Q3 and 2025-Q3
Source: Trade Map (2025)

During the period under consideration, the UK recorded the highest y/y growth of 36% of South Africa's agricultural exports, followed by the EU (27%), the Americas (17%), as well as Asia and Middle East (14%). Despite South Africa's sustained export growth over the years, the new uncertain global trade reality brought about by the USA's 30% reciprocal tariffs will most likely have profound negative implications on agricultural exports. However, the USA recently revised the reciprocal tariff structure and commodities such as fruit juices, avocados, banana, oranges and limes, among others, are exempted from these tariffs. Nevertheless, approximately 70% of South Africa's agricultural products are still subject to the 30% reciprocal tariffs.

Table 1 below presents the value and growth of South Africa's top 15 agricultural exports and imports in Q3 2025 compared to Q3 2024. In Q3 2025, agricultural export growth was mainly driven by ample harvest of several agricultural products that were in season, as well as high commodity prices across different regions. During this period, oranges were the most exported agricultural commodity accounting for a share of 17% of total exports, followed by soft citrus[1] (11%), lemon (5%), apples and nuts (4%), wine (3%), and maize (2%). Most of the top 15 agricultural exports recorded impressive growth over this period, with lemons leading with a 68% y/y growth rate, followed by nuts (43%), soft citrus (36%), flavoured waters (37%), oranges and dried grapes (35%), among others. Both avocado and maize recorded y/y decline, with maize declining by 48% while avocado declined by 39%.

[1] **Mandarins (including tangerines and satsumas)**

Table 1: South Africa's quarterly agricultural products trade performance by region between 2024-Q3 and 2025-Q3

	2024-Q3	2025-Q3	Y/Y	% Share
Exports (US$'000)				
Total Exports	**4 117 571**	**4 661 102**	**13%**	**-**
Oranges	583 035	786 205	35%	17%
Soft citrus	393 058	534 818	36%	11%
lemons	141 924	237 961	68%	5%
Apples	148 197	178 545	20%	4%
Nuts (excl. coconuts, Brazil nuts, cashew ...)	116 394	165 893	43%	4%
Wine	104 083	123 757	19%	3%
Maize (excl. seed for sowing)	215 864	112 325	-48%	2%
Macadamia nuts	70 177	71 346	2%	2%
Dried grapes (raisins)	52 652	70 926	35%	2%
Raw cane sugar	53 528	66 324	24%	1%
Food preparations, n.e.s.	48 971	63 695	30%	1%
Flavoured Waters	41 568	57 154	37%	1%
Fresh pears	42 512	52 200	23%	1%
Prepared sauces.	48 807	49 237	1%	1%
Macadamia nuts (in shell)	79 466	48 220	-39%	1%

	2024-Q3	2025-Q3	Y/Y	% Share
Imports (US$'000)				
Total Imports	**1 959 341**	**1 932 156**	**-1%**	**-**
Wheat and meslin	188 161	151 701	-19%	8%
Rice	162 054	139 764	-14%	7%
Palm oil	124 836	124 545	0%	6%
Crude sunflower-seed or safflower oil	43 038	73 123	70%	4%
Raw cane sugar, in solid form	59 378	67 209	13%	3%
Food preparations, n.e.s.	60 574	60 406	0%	3%
Whiskies	40 996	50 113	22%	3%
Extracts, essences and concentrates, of coffee	32 958	50 063	52%	3%
Flavoured Waters	33 283	40 289	21%	2%
Animal offals (other than fish)	39 461	36 160	-8%	2%
Coffee (excl. roasted and decaffeinated)	29 194	31 312	7%	2%
Animal Feed Preparations	27 015	28 475	5%	1%
Frozen Poultry (cuts in pieces)	23 981	26 286	10%	1%
Uncooked pasta	19 656	26 066	33%	1%
Cane or beet sugar and chemically pure sucrose	18 326	23 751	30%	1%

Source: Trade Map (2025)

In terms of agricultural imports, there was a general increase in imports of most commodities. For instance, crude sunflower seed oil was the leading imported commodity with 70% y/y growth, followed by extract, essences and concentrates of coffee (52%), uncooked pasta (33%), and cane or sugar beets and chemically pure sucrose (30%), amongst others. A significant reduction in imports of major commodities like wheat, rice, and palm oil had a counter effect, which led to a 1% decline in overall agricultural imports. Wheat and meslin were the leading imported commodities with a share of 8% of the value of imports, followed by rice (7%), palm oil (7%), crude sunflower (4%), and raw cane sugar (3%), among others.

In conclusion, South Africa's agricultural export performance in Q3 2025 illustrates the sector's continued resilience despite shifting global trade conditions. Export earnings grew significantly from the previous quarter, contributing to an improvement in the country's overall agricultural trade balance, which is also supported in part by a modest annual decline in imports. Although the volatile tariff structure of the USA's trade policy is expected to further reduce South Africa's agricultural exports to this region, South Africa can effectively offset these losses by expanding exports to alternative and growing markets such as the EU, UK, and the broader Asian and Middle Eastern regions. This diversification reinforces the sector's adaptability and strengthens South Africa's position in global agricultural value chains despite emerging trade pressures.

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