

AGRICULTURAL TRADE PERFORMANCE BRIEF: SOUTH AFRICA SUSTAINED RECORD EXPORT GROWTH AMID GLOBAL TRADE HEADWINDS IN **2025**



agriculture

Department:
Agriculture
REPUBLIC OF SOUTH AFRICA



NAMC

Promoting market access for South African agriculture

Key highlights

- Agricultural exports reached a record US\$15.1 billion in 2025, up 10% year-on-year (y/y), marking the sixth consecutive year of growth.
- Imports increased moderately (by 4% to US\$7.7 billion), but South Africa maintained a strong agricultural trade surplus.
- Africa remained the leading destination (42%), followed by the European Union (21%) and Asia & the Middle East (20%), United Kingdom (7%), Americas (6%), and United States (3%), respectively.
- Export growth was driven by high-value products such as lemons, nuts, soft citrus, and oranges, among others, underscoring the continued strength and competitiveness of South Africa's horticultural subsector.

Over the past three decades, South Africa has maintained its position as a net exporter of agricultural products, gaining market access in over 181 countries. It remains the largest food producer and exporter in Africa. Hence, the sector continues to be vital for generating export earnings, creating employment opportunities, and safeguarding national food security. Despite the volatile global trade environment characterized by thawing trade wars particularly in the wake of United States (U.S) reciprocal tariffs, South Africa was able to maintain its robust export growth of agricultural products in international markets in 2025. In 2025, South Africa's agricultural exports reached record levels for the sixth consecutive year since the year 2020. As of the end of 2025, agricultural exports were worth a total value of about US\$15.1 billion, an increase of about 10% compared to the US\$13.7 billion exported in year 2024.

The country's strong export performance over the years is largely underscored by collaborative efforts of both government and industry in maintaining good relations with existing markets and opening of new markets. In addition, strong production performance for the various subsectors ranging from field crops, horticulture, as well as the thriving animal and livestock industries continues to also drive export growth. 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. Figure 1 below depicts South Africa's annual agricultural trade performance over the past ten years since 2016.



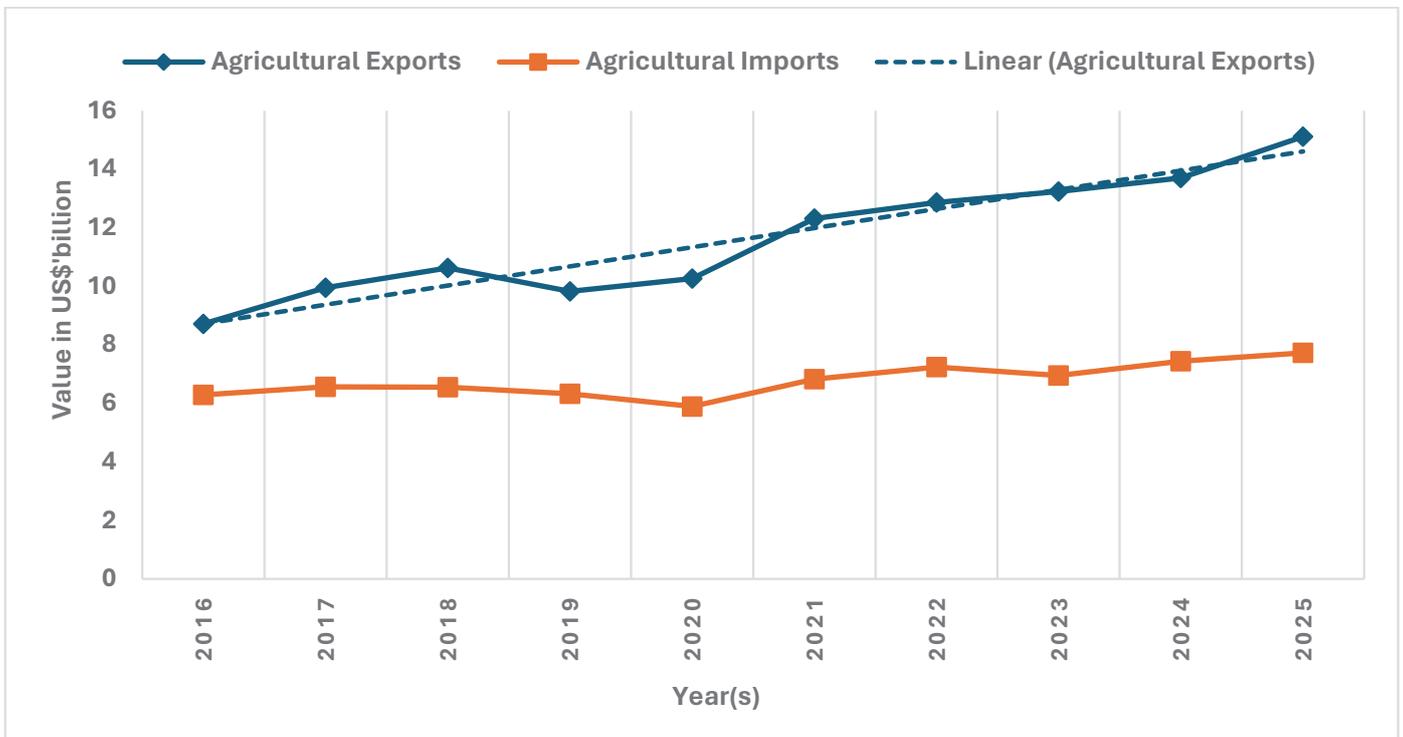


Figure 1: South Africa’s annual agricultural products trade performance from 2016-2025

Source: Trade Map (2026)

As shown in **Figure 1**, agricultural exports grew by approximately 73% from a value of US\$8.7 billion in 2016 to about US\$15.1 billion in 2025. Following a drop in 2019, agricultural exports have managed to recover and grow consistently by 47% between 2020 and 2025. In 2025, the Netherlands was the leading export destination for South Africa’s agricultural exports with a share of 12%, followed by Zimbabwe (8%), the United Kingdom (UK) (7%), as well as Mozambique, Namibia, and Botswana all accounting for a share of 6% of total agricultural exports. On the other hand, agricultural imports also increased slightly in 2025, recording a 4% year-on-year increase. In addition, over the 2016-2025 period imports increased significantly by 23%. Despite being a dominant agricultural product exporter, South Africa 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 the end of year 2025, Eswatini and Thailand were leading source markets for South Africa’s agricultural imports accounting for a share of 7%, followed by China (6%), Brazil (6%), Indonesia (6%), and Malaysia (5%), respectively.

Figure 2 below illustrates the regional distribution of South Africa’s agricultural exports in 2025. The African continent remains the leading export destination for South Africa’s exports. In 2025, Africa accounted for a share of 42% of total agricultural exports, followed by the European Union (21%), Asia and Middle East (20%), the UK (7%), Americas (6%), and the U.S (3%). During this period, South Africa’s agricultural exports increased by 20% y/y, followed by the UK (16%), Asia and Middle East (7%), Americas (7%), and Africa (6%). On the other hand, agricultural exports to the U.S declined by 4%, leading a shrink in its share of exports by South Africa from 4% in 2024 to 3% in 2025.

¹ <https://www.intracen.org/>

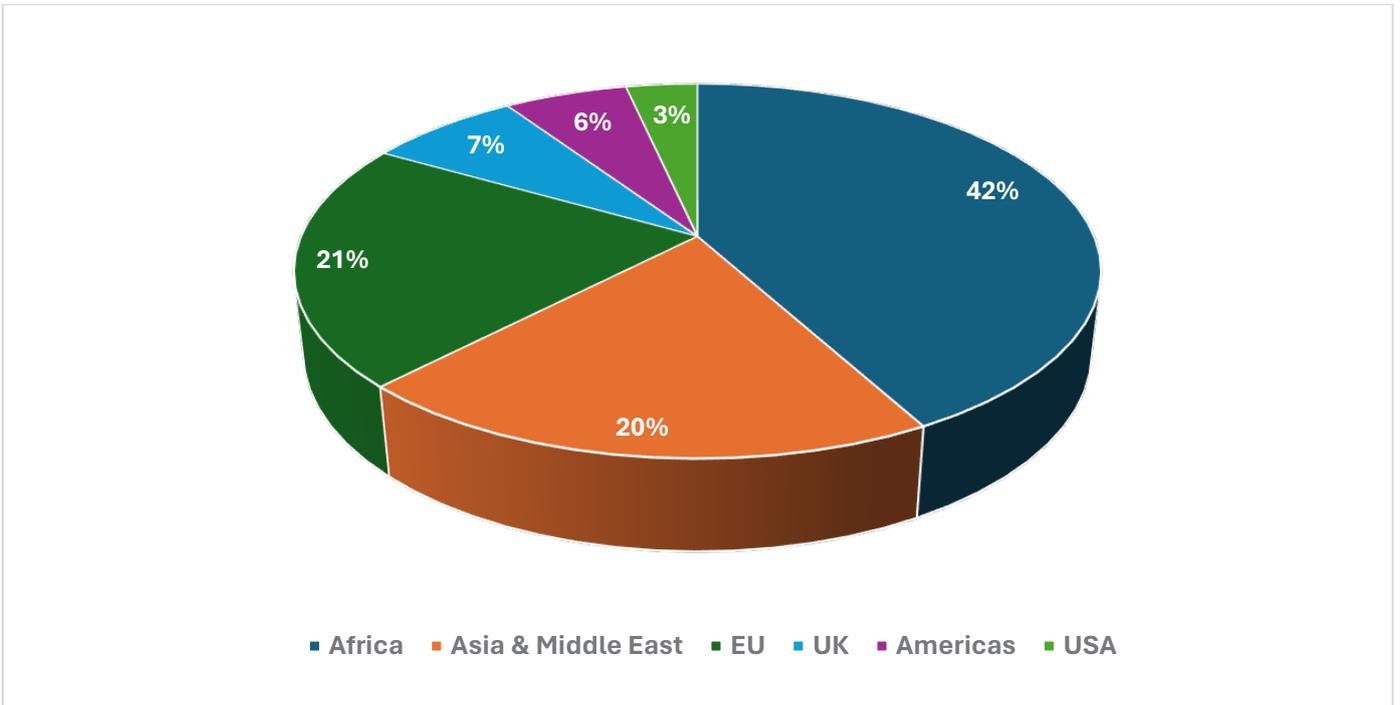


Figure 2: Distribution of South Africa’s agricultural products by region in 2025.

Source: Trade Map (2026)

Despite the recent one-year renewal of the African Growth and Opportunity Act (AGOA) which provides duty-free access for selected Sub-Saharan African countries (including South Africa), the punitive 30% reciprocal tariffs imposed by the U.S on imports from South Africa’s overrides the AGOA benefits. Hence, the reciprocal tariffs are still expected to have negative implications to South Africa’s agricultural exports.

Table 1 below presents South Africa’s top 15 agricultural exports and imports between 2025 and 2024 in value terms. During this period, oranges were the most exported agricultural commodity, accounting for a share of 7% of total exports, followed by table grapes (6%), soft citrus (5%), maize (5%), fresh apples (4%), and lemons (4%), among others. The observed export growth was driven by significant growth in exports of several commodities such as lemons which grew by 59%, followed by nuts (43%), soft citrus (40%), oranges (36%), and flavoured waters (35%), respectively. On the other hand, both maize and wine exports recorded a decrease of 12% and 2% in value terms, respectively.



Table 1: South Africa's annual agricultural products trade performance between 2024 and 2025

	2024	2025	Y/Y	% Share
Exports (US\$'000)				
Total Exports	13 702 285	15 114 968	10%	-
Oranges	758 712	1 029 547	36%	7%
Fresh grapes	838 809	909 888	8%	6%
Soft citrus ²	581 649	814 337	40%	5%
Maize (excl. seed for sowing)	813 837	719 257	-12%	5%
Fresh apples	577 377	645 427	12%	4%
Lemons	333 301	531 339	59%	4%
Wine	442 752	434 994	-2%	3%
Wool	251 781	288 357	15%	2%
Fresh pears	244 057	276 386	13%	2%
Food preparations, n.e.s.	199 675	236 730	19%	2%
Flavoured waters	167 601	225 693	35%	1%
Nuts ³	156 992	224 862	43%	1%
Dried grapes	178 890	218 931	22%	1%
Preparations for sauces and prepared sauces	169 495	202 190	19%	1%
Macadamia nuts	159 936	192 943	21%	1%

	2024	2025	Y/Y	% Share
Imports (US\$'000)				
Total Imports	7 435 312	7 725 202	4%	-
Wheat and Meslin	537 776	580 101	8%	8%
Palm oil	498 508	580 079	16%	8%
Semi-milled or wholly milled rice	640 941	541 272	-16%	7%
Raw cane sugar, in solid form	205 393	270 593	32%	4%
Food preparations, n.e.s.	230 285	227 088	-1%	3%
Whiskies	158 564	160 693	1%	2%
Flavoured waters	135 716	153 304	13%	2%
Coffee extracts	104 090	147 409	42%	2%
Guts, bladders and stomachs of animals	137 568	137 809	0%	2%
Crude sunflower seed or safflower oil	175 578	137 132	-22%	2%
Coffee	98 461	136 072	38%	2%
Maize	103 550	134 560	30%	2%
Frozen fowls of the species Gallus domesticus, not cut in pieces	159 487	133 251	-16%	2%
Frozen cuts and edible offal of fowls of the species Gallus domesticus	107 775	128 733	19%	2%
Animal feed preparations	113 799	116 371	2%	2%

²Fresh or dried mandarins incl. tangerines and satsumas (excl. clementines)

³Excl. coconuts, Brazil nuts, cashew ...

⁴Poultry meat

In terms of agricultural imports, there was a general increase in imports of most commodities. In 2025, the total agricultural imports grew by 4% from a value of US\$7.4 billion in 2024. Wheat and meslin was the most imported agricultural commodity in 2025, accounting for a share of about 8% of total imports, followed by palm oil (8%), rice (7%), raw cane sugar (4%), food preparations (3%), and whiskies (2%), among others. Despite the observed growth in imports, imports of several commodities declined during this period, these include Crude sunflower seed or safflower oil (-22%) poultry meat (-16%), rice (-16%), and food preparations (-1%), although they remained part of the top imported commodities.

In conclusion, South Africa's agricultural sector continued to demonstrate remarkable resilience in 2025, recording its seventh consecutive year of export growth and reaching a new record of US\$15.1 billion. Despite geopolitical uncertainties such as the reciprocal tariffs imposed by the U.S., and, logistics failures, diseases outbreaks, rising inputs costs, climate volatility and other persistent trade disruptions, the country maintained its status as a leading agricultural exporter in Africa. Strong production performance, market diversification, and sustained compliance with non-tariff measures and quality standards supports continued export expansion, particularly for high-value horticultural products such as citrus and nuts. While agricultural imports also increased moderately reflecting demand for products such as wheat, rice, and palm oil, the trade surplus remained substantial, reinforcing the sector's strategic importance for foreign exchange earnings, employment, and food security. Going forward, safeguarding and diversifying export markets, strengthening regional trade within Africa, and proactively addressing trade policy risks particularly in key markets such as the U.S. given the renewed AGOA framework will be critical to sustaining export momentum in 2026 and beyond.





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