

SA Trade Relations, Opportunities and Challenges: Livestock Value-Chain

Directorate: International Trade Promotions
21-22 July 2026



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Presentation Outline

- Introduction to International Trade
- Overview of International trade agreements
- State of SA's livestock and meat trade with the world
- Conclusion



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Introduction to International Trade

- Regulatory body: World Trade Organization (WTO)
- **Main Objective:** To promote a rules-based international trading system that facilitates free, fair, predictable, and smooth global trade, thereby contributing to economic growth and development.
- WTO Agreement on Agriculture and Sanitary & PhytoSanitary (SPS) Agreement: protect human, animal, and plant life or health while ensuring that sanitary and phytosanitary (SPS) measures do not create unnecessary barriers to international trade.
- The WTO provides a framework of trade rules for the FTA and Customs Unions.



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International Trade Agreements

Under implementation	Under negotiations or review	Trade Acts
AFRICA: SACU, SADC-FTA, AFCFTA	AFRICA: T-FTA, AFCFTA	USA: AGOA
EUROPE: SADC-EU EPA, SACUM-UK EPA, SACU-EFTA FTA	ASIA: SACU-INDIA PTA (currently under negotiations)	ASIA: CHINA-AFRICA ZERO TARIFF PREFERENCE SCHEME (CAEPA)
AMERICAS: SACU-MERCOSUR PTA		
MULTILATERAL: WTO, WWTG		



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South African Customs Union (SACU)

- SACU – 1969 (Established in 1910. Re-negotiated in 2002, last amended in 2013)
- Agreement concluded by SA and the BELN (5 Member States).
- Provides preferential market access opportunities (duty-free, quota-free trade).
- As a Customs Union, SACU represents One Market for traded goods with a CET.
- Compliance with WTO SPS required.
- **Benefits or opportunities:** Elimination of Tariff and Non-Tariff measures, Harmonisation of product standards and technical regulations, Freedom of transit, Larger preferential market access, no tariffs or quotas
- **Challenges:** Measures for the protection of infant industries in the BELN countries.



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Southern African Development Community Free Trade Area (SADC-FTA)

- Launched in August 2008.
- Made of 13 of 16 SADC member states (excl. Angola, Comoros and DRC).
- **DRC and Angola are busy with accession into the FTA.**
- Products enjoy duty-free trade for members that are party to the FTA.
- Zimbabwe, Malawi and Tanzania are yet to finalise the elimination of tariff protection on some products.
- **Benefits or opportunities:** Elimination of Tariff and Non-Tariff measures, Harmonisation of product standards and technical regulations, Freedom of transit, Trade facilitative rules of origin, Larger preferential market access, about 90% of trade is duty-free and quota-free
Increased market share, Value-addition, Less stringent food quality standards.



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African Continental Free Trade Area (AfCFTA)

- Established in March 2018 in Kigali, Rwanda.
- Preferential trade commencement: January 2021.
- 54 of 55 African Union members signed the agreement (excl. Eritrea).
- 48 members have deposited their instruments for ratification.
- 49 members have submitted tariff offers (42 verified and adopted by the Council of Ministers).
- Composition of the SACU Tariff Offer: Category A, Category B (sensitive) & Category C (exclusion).
- Tariff phase-down plan: SACU= 90% of category A over 10 years; 7% sensitive products over 13 years.
- SACU concluded the administrative and regulatory processes for the commencement of trade.



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African Continental Free Trade Area (AfCFTA) cont..

- **Benefits or opportunities:** World's largest FTA, Boost intra-Africa trade (~52.3%), Larger market reach, Advances regional economic integration- single market, Better harmonization, Coordination of trade liberalisation and facilitation of instruments, Enhance competitiveness.
- **Big Challenge:** Slow implementation.
- Negotiations have not been concluded.
- All outstanding issues are being negotiated as part of the Built-in Agenda. This includes rules of origin for some products, such as the automotive products, clothing and textiles.



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Tripartite Free Trade Area (TFTA)

- Officially launched in June 2015.
- Made up of the COMESA+EAC+SADC (27 members).
- Ongoing negotiations and signed by 22 member countries (SA signed & ratified).
- SACU & EAC have just concluded tariff negotiations on category A (90%). The 2 Offers will now go through the necessary approvals by Trade Ministers, and then be gazetted/ published for trade to START.
- **Benefits and opportunities:** Promotes regional economic integration, Harmonization of trade regimes, Access to a larger market, transparency, Industrial development, investments, and job creation.
- **Challenges:** Slow progress in bilateral tariff negotiations.



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SACU-MERCOSUR Preferential Trade Agreement (PTA)

- Agreement between SACU and Argentina, Brazil, Paraguay and Uruguay.
- Signed in December 2004 and renegotiated concluded in March 2009.
- Trade under the agreement commenced in April 2016.
- Exchange of about 1000 tariff lines on both sides.
- Margin of preference: 10% -100%
- **Benefits or opportunities:** Promotes trade between the two regions, Promote trade-related issues such as customs cooperation, sanitary and phytosanitary (SPS) measures.
- **Challenges:** Trade deficit



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AGOA

- AGOA was established in 2000.
- **Benefits:** It is a unilateral preference programme which offers duty-free access to qualifying Sub-Saharan Africa countries on selected products in the USA market.
- Generalized system of preferences (GSP) by adding 1800 product lines to make a total of about 6500 products.
- AGOA extension: 30 Sep 25 – 31 Dec 2026.
- **Challenges:** Uncertainty on renewal.



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SACU-China relations

- Framework Agreement on Economic Partnership for Shared Prosperity (CAEPA) between China and 53 African countries, including South Africa.
- Came into effect on 1 May 2026 to April 2028.
- **Benefit:** Zero customs duties for 100% of tariff lines, subject to compliance with the applicable tariff schedule and rules of origin.
- **Opportunities:** Enhance export competitiveness, Diversify into higher-value-added products and Expand market access for agricultural, industrial, and beneficiated goods.
- **Challenges:** Temporary arrangement.



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SADC-EU EPA

- Trade between SA and EU takes place under the SADC-EU EPA.
- Agreement signed on 10 June 2016 & implemented from 10 October 2016.
- The SADC-EU EPA package contains, in addition to normal duty-free and partial duty concessions, TRQs.
- Protection of South Africa's geographic indication (GI) names such as Karoo lamb, wines, teas and some meat products in the EU market.
- **Challenge:** Sanitary and Phytosanitary measures imposed by EU on some agricultural exports to the EU , agreement review onhold.



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SACU-M EPA

- Post BREXIT Economic Partnership Agreement between SACU plus Mozambique and the UK.
- Trade between SA and the UK takes place under the SACUM-UK EPA.
- Entered into force on 1 January 2021, some provisions still being negotiated.
- The SACUM-UK package contains, in addition to normal duty-free and partial duty concessions, TRQs.
- **Benefits or Opportunities:** Enhanced market access for wines and sugar in the UK.
- SA additional export quota after leaving EU / Brexit. (e.g., Butter, Skimmed powder milk, Wine , Sugar , Ethanol, etc.).



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SACU-EFTA FTA

- SACU-EFTA Free trade negotiations launched in 2003.
- The Agreement was signed in June 2006 and entered into force in May 2008.
- EFTA is comprised of Iceland, Norway and Switzerland and Liechtenstein.
- The Agreement is divided into the Main and Bilateral Agricultural Agreements.
- The Main Agreement consists of 7 Chapters with a total of 44 Articles and 8 Annexes.
- Chapter 2 - Trade in Goods : Industrial products (including Forestry), Fish and other Marine products, Basic Agricultural Products (BAPs) and Processed Agricultural Products (PAPs).



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SACU-EFTA FTA cont..

- BAPs covers basic agricultural products within chapters 01 to 24 and 35 whilst PAPs covers processed agricultural products within chapters 04 to 22 .
- PAPs are included in the main agreement which also covers industrial products as well as fish and other marine products.
- Trade in BAPs is covered in separate bilateral agricultural agreements between individual EFTA countries and SACU as a bloc.



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SACU-EFTA FTA cont..

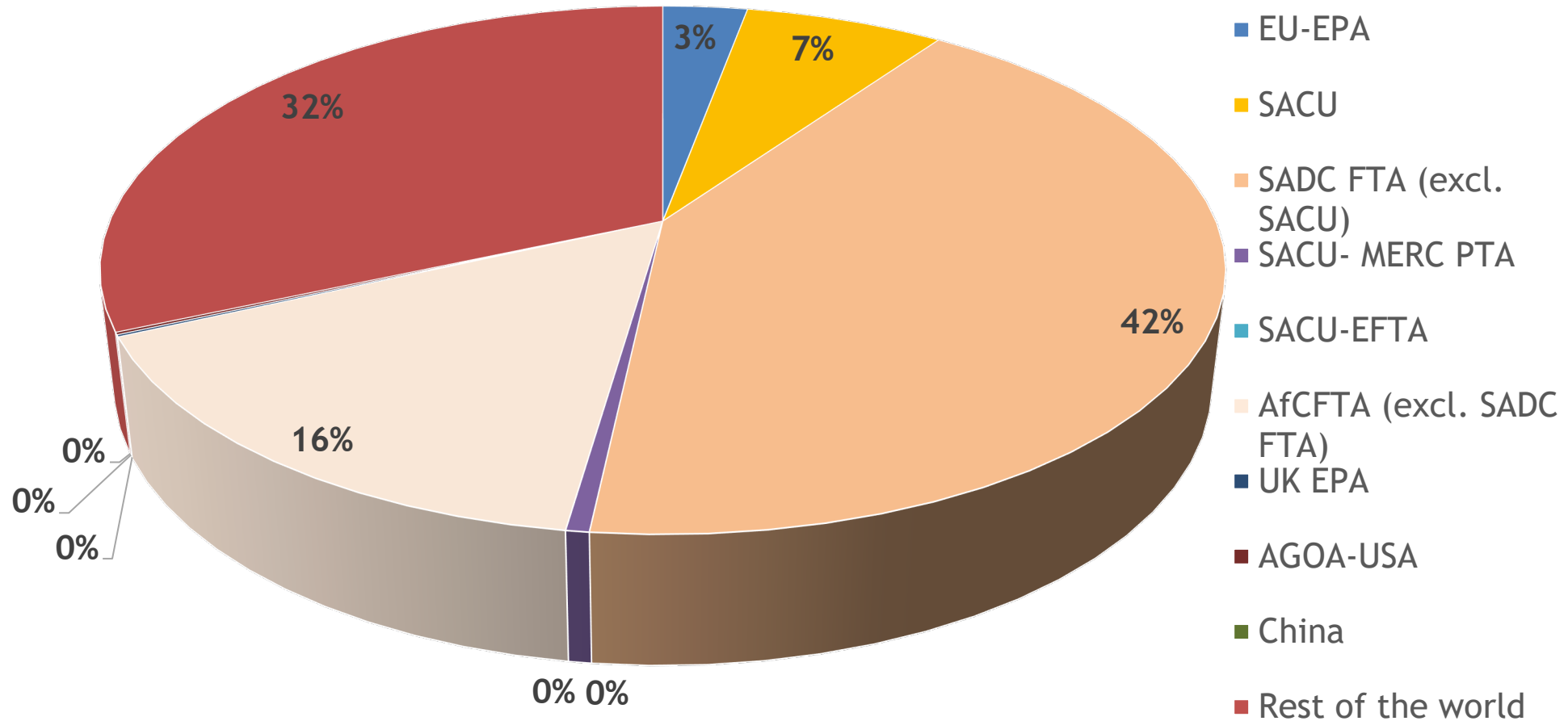
- **Benefits or Opportunities:**
 - Fish and Forestry products are already traded duty-free between the two regions
 - EFTA has already eliminated tariffs on all NAMA products originating from SACU
 - EFTA's NAMA products still attract tariffs when exported into SACU
 - Both regions have reduced and on some products eliminated tariffs on BAPs and PAPs
 - No export subsidies on products subjected to tariff concessions
- **Market Access Requirements:** Rules of Origin (RoO) and Sanitary and PhytoSanitary (SPS) measures.
- **Challenges:** South Africa is a net importer of goods from EFTA.



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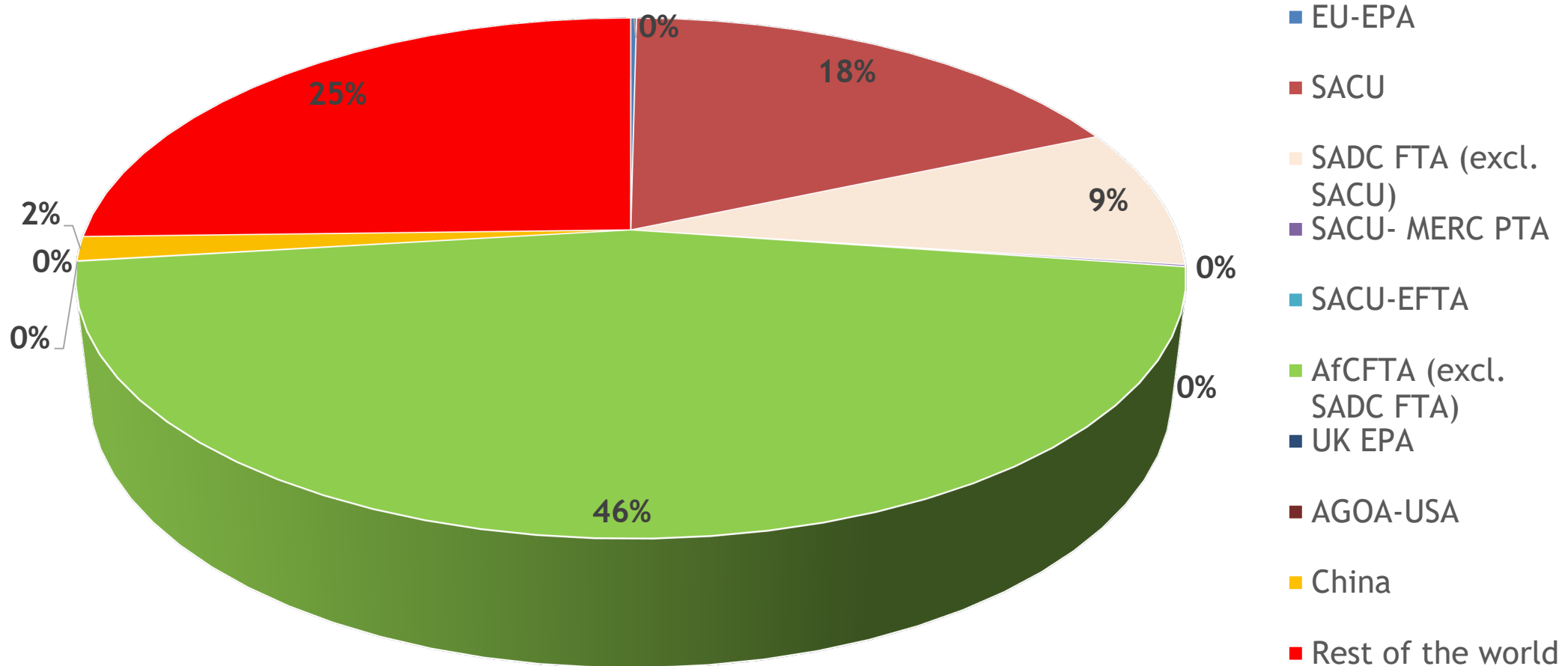
Livestock export performance in 2025



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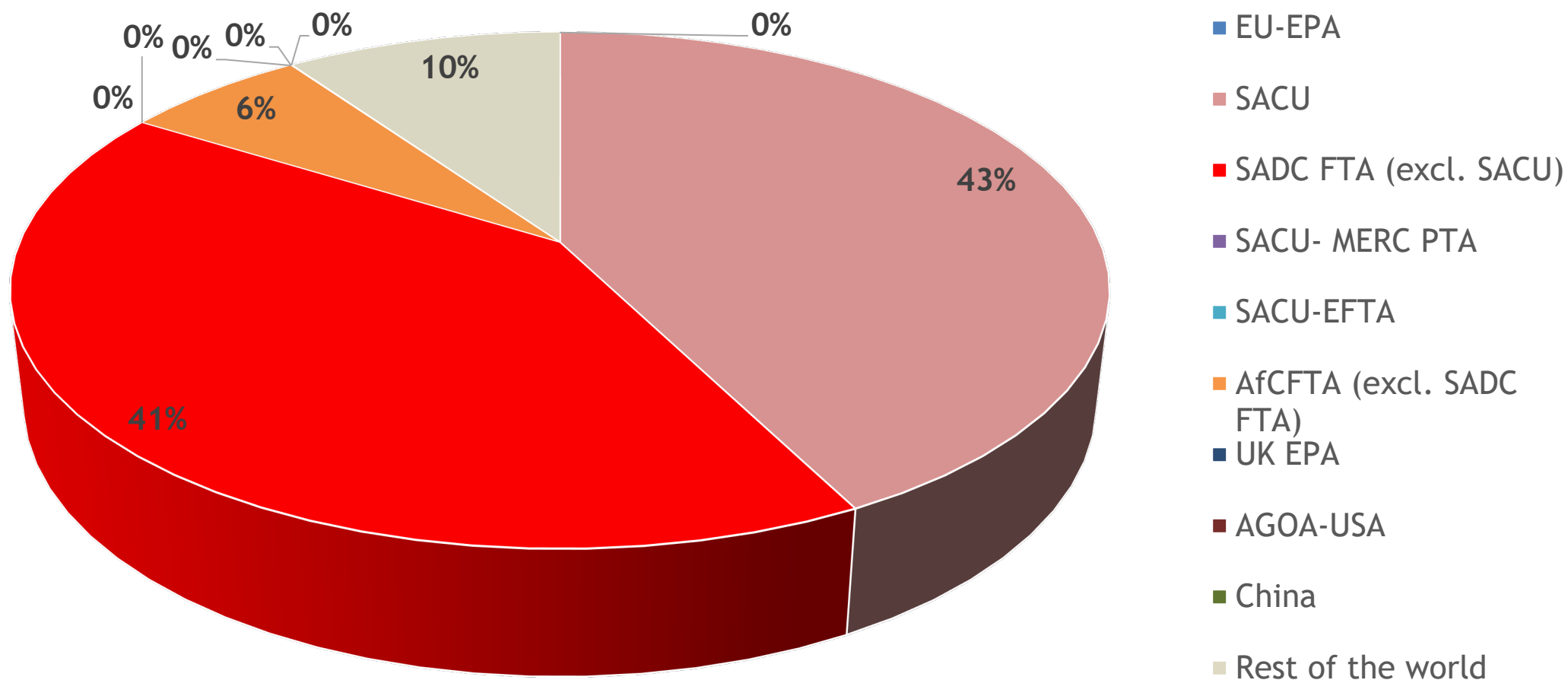
Meat export performance in 2025



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Dairy and eggs export performance in 2025



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Conclusion

- South Africa exports 32% of livestock, 25% of meat and 10% of dairy and eggs outside its preferential markets. Therefore, trade agreements may not be used optimally and there is an opportunity to negotiate economic partnerships and free trade agreements with the rest of the world.
- Value-addition on products may enhance product and market diversification.
- Expand halal, cold-chain and certification capacity for meat and fresh produce exports.
- Management of disease outbreaks.



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Thank you

Contact details for more information:

Mr Sphamandla Mazibuko	SphamandlaM@nda.gov.za +27 12 319 8189
Mr Success Muluvhu	SuccessM@nda.gov.za +27 12 319 8088
Mr Xolani Nqaba	XolaniN@nda.gov.za +27 12 319 8020
Mr Ezra Steenkamp	EzraS@nda.gov.za +27 12 319 8003
Mr Thapsana Molepo	ThapsanaS@nda.gov.za +27 12 319 7369



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