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SOUTH AFRICA'S FRESH GRAPE EXPORTS
TO THE REPUBLIC OF IRELAND

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SOUTH AFRICA'S AGRICULTURAL
FUTURE IN A CHANGING EUROPEAN
MARKET



agriculture

Department:
Agriculture
REPUBLIC OF SOUTH AFRICA



NAMC

Promoting market access for South African agriculture

Acknowledgement

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BACKGROUND

Welcome to the 106th issue of the Trade Probe Advisory Report, published by the National Agricultural Marketing Council (NAMC) in collaboration with the Department of Agriculture (DoA) and the Agricultural Research Council (ARC). The report provides policy insight and advice to the Ministry of Agriculture and the Directly Affected Groups (DAGs). This issue focuses on the European market as we celebrate the 10th anniversary of the EU-SADC Economic Partnership Agreement (EPA), which was signed in 2016.

The European Union (EU) was formed on 1 November 1993, following the entry into force of the Maastricht Treaty, in what was regarded as the decade of treaties, as Europe also finalised the Treaty of Amsterdam in 1999. The EU thus became a customs union whereby all its members formed a single customs territory for customs purposes. This ensured that no customs duties are paid on goods moving between EU member States, that EU member states apply a common customs tariff for goods imported from outside the EU, and that goods legally imported can circulate throughout the EU with no further customs checks.

Over the years, this has positioned the EU as a strong market with massive business opportunities, especially for agricultural exporters such as South Africa. While the EU remains a stronghold for South African agricultural exports, several developments warrant reassessing the market. First, rising geopolitical tensions, such as the blockade of the Strait of Hormuz, the ongoing Russia-Ukraine conflict, and instability in the Middle East, pose indirect but strategic risks to market access. Second, countries are reshaping trade arrangements, with different countries entering into trade agreements that may pose serious competition to South African products.

Third, the EU's evolving environmental, sustainability, and regulatory environment is increasingly demanding compliance from suppliers, driven by changing consumer sentiment that focuses on value for money as well as the environmental, economic, or social effects of the products that they consume. This makes it more important to further explore South Africa's opportunities and potential threats in the market. In essence, there is optimism that challenges and changes may offer opportunities for South African exporters, but it will be important to identify those opportunities early and to mitigate potential threats efficiently.

Agricultural economists probed and analysed trade performance, focusing on SA-EU trade dynamics in the context of the EU-SADC Economic Partnership Agreement (EPA), and identified opportunities to improve market access and trade relations between South Africa and the EU.

¹ It must be noted that for the purposes of this report, the EU refers to the 27 members of the EU and these are Belgium, Bulgaria, Croatia, the Czech Republic, Denmark, except the Faroe Islands and Greenland, Germany, except the Island of Heligoland and the territory of Büsingen, Estonia, Ireland, Greece, Spain, except Ceuta and Melilla, France, except New Caledonia, Saint-Pierre and Miquelon, Wallis and Futuna Islands, French Polynesia and French Southern and Antarctic Territories, but including the overseas departments of Guadeloupe, French Guiana, Martinique, Mayotte and Reunion Islands, Italy, except the municipalities of Livigno and Campione d'Italia and the national waters of Lake Lugano which are between the bank and the political frontier of the area between Ponte Tresa and Porto Ceresio, Cyprus (pending a settlement to the Cyprus problem, the application of the Community 'acquis' is suspended in those areas in which the Government of the Republic of Cyprus does not exercise effective control), Latvia, Lithuania, Luxembourg, Hungary, Malta, The Netherlands, Austria, Poland, Portugal, Romania, Slovenia, the Slovak Republic, Finland, Sweden.

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LIST OF ACRONYMS

Acronym	Full name
CGA	Citrus Growers' Association of Southern Africa
DoA	Department of Agriculture
EPA	Economic Partnership Agreement
EU	European Union
EUDR	European Union Deforestation Regulation
NAMC	National Agricultural Marketing Council
SADC	Southern African Development Community
SPS	Sanitary and Phytosanitary
UK	United Kingdom
UNCTAD	United Nations Conference on Trade and Development
US	United States
USD	United States Dollar
WIT	World Integrated Trade Solution

1. Assessing the potential to expand South Africa's fresh grape exports to the Republic of Ireland

A

ANALYSIS



Buhlebemvelo Dube

1.1. Trade background between South Africa and Ireland

South Africa and Ireland enjoy a strong, mutually beneficial trade relationship, with South Africa's agricultural exports to Ireland valued at \$63.6 million in 2025, up from \$55.5 million in 2024. Despite this growth, there remains potential to expand market access and strengthen trade ties, given Ireland's importance in Europe's dynamic consumer market and the strong trend toward healthy foods, such as fresh fruit. Political and regulatory dynamics within the EU, tariffs, and non-tariff measures shaped by changing trade arrangements worldwide are likely to influence growth. This article therefore focuses on grapes. It examines trade indicators and performance, as well as areas where South Africa can expand its footprint and supply fresh grapes to Ireland.

1.2. Trade indicators of South Africa's fresh grapes to Ireland

Fresh grapes are the second most exported agricultural

product from South Africa to Ireland, after lemon oil. South Africa's fresh grape exports to Ireland have an export value of \$8.3 million, with a disappointingly low 0% annual growth in value between 2021 and 2025 (Trademap, 2026). Notably, dried grapes have a modest export value of \$164 000, with 71% annual growth in value between 2021 and 2025 (Trademap, 2026). This is notable because fresh grapes in Ireland have an import value of \$69.2 million, underpinned by 10% annual growth between 2021 and 2025 (Trademap, 2026), while dried grapes grew 16% annually over the same period. This suggests that Ireland's imports of fresh and dried grapes have been rising, and that South Africa has not been particularly successful with fresh grapes. This also highlights that South Africa has been efficient in supplying dried grapes and maximising value capitalisation, despite dried grapes being less valuable than fresh grapes. Figure 1 shows the fresh grape trade between South Africa and Ireland.

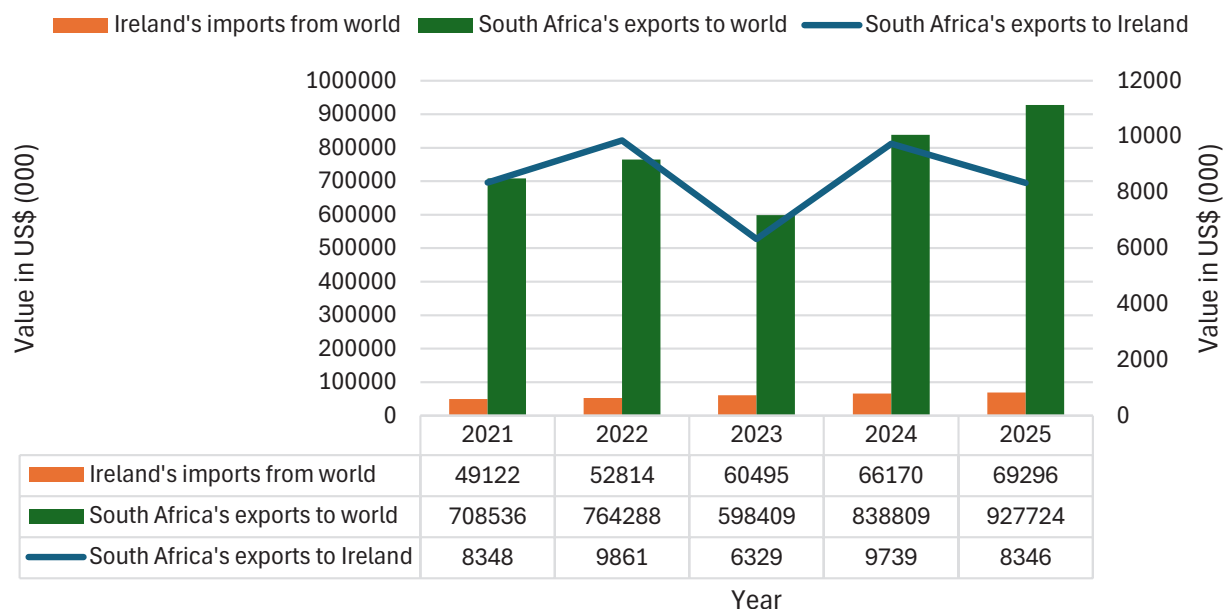


Figure 1: Fresh grapes trade between South Africa and Ireland

Source: NAMC calculations based on TradeMap data (2026)

Despite South Africa's access to the Republic of Ireland's markets and its 0% ad valorem tariff, exports have remained largely below their potential at \$8.3 million in 2021, despite movements between these years. This is missed opportunity cost, given that Ireland's imports of fresh grapes rose from \$49.1 million in 2021 to \$69.2 million in 2025, reflecting strong demand. At the same time, South Africa's fresh grape exports to the world grew from \$708 million in 2021 to \$928 million in 2025, indicating rising global demand. This mismatch reflects deeper challenges in Ireland's and South Africa's trade but also presents opportunities to intensify market access for fresh grapes.

1.3 Conclusion

The industry and policymakers must continuously intensify penetration of market access in Europe. This is largely due to the EU's competitiveness and constantly changing dynamics. Improving market access for fresh grapes in Ireland matters because it now requires deeper engagement with non-tariff measures and navigation of volatile geopolitical and trade tensions. Although emerging markets are growing worldwide, it remains crucial to retain traditional markets and continue identifying new opportunities. South Africa and Ireland remain strong trading partners, allowing further cooperation through the EU-SADC Economic Partnership Agreement.

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2. Can the EU's surging fruit imports boost South Africa's avocado exports rebound in 2026?

A

ANALYSIS



Thabile Nkunjana

2.1. Fruit trade background between South Africa and Europe

Fruits valued at US\$77.4 billion were imported by the European Union (EU) in 2025, cementing its status as the world's top fruit importer (Fresh Fruit Portal, 2026). This accounted for almost 40% of the sector's global imports and marked a 20% year-over-year rise. The performance reflects the sheer scale of the region's consumer base and its reliance on imports to provide a year-round supply of fruit, despite strong domestic agricultural production. South Africa is expected to export 21 to 22 million 4-kilogram cartons of avocados in 2026. This indicates a strong volume recovery, propelled by recently maturing orchards. Export value fell sharply from US\$204.7 million (R3.7 billion) in 2024 to US\$164.0 million (R2.9 billion) in 2025, a 19.8% year-over-year decline, due to the 2025 output fall. Can South Africa's avocado exports increase in 2026, given the country's anticipated recovery and the EU's rising avocado imports? Of the EU's fruit imports in 2025, fresh avocados came in second with \$5.09 billion in imports, up 11% and making about 7% of the market. Peru's capacity to deliver when needed allowed it to retain

its position as the principal supplier. Given that many of South Africa's fruits, including avocados, are intended for this market, the EU's growing fruit demand is excellent news for the country. However, Peru, Colombia, and a rebounding Chile are South Africa's top rivals for avocado exports to the EU in South America, with combined exports surpassing one million metric tons for the first time in 2025. Overall, the South American region is well positioned for sustained structural supply expansion.

2.2. Why retaining the European market is important for South Africa's avocados

Figure 2 shows South Africa's avocado exports by value and percentage share in US dollars in 2025. As previously stated, avocado exports from South Africa totalled R2.9 billion, or US\$164.0 million, in 2025. The EU-27 accounted for 77% of this value, making it South Africa's largest market. The UK came in second with 17%, while Asia, which includes the Middle East, came in third with 4%. With a 2% share, Africa was South Africa's fourth-largest market; the Americas and Oceania had a negligible or zero share.

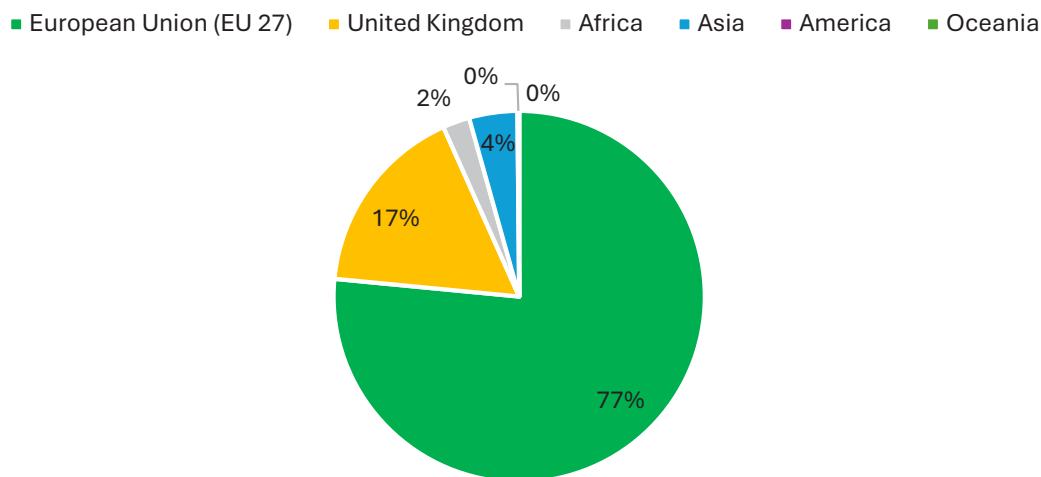


Figure 2: South Africa's avocados to the world by value, US\$ percentage share, 2025

Source: Trade map and NAMC, 2026

Figure 3 shows the EU's avocado import trend over the previous ten years, from 2016 to 2025. The graph shows that avocado imports into the EU have increased dramatically throughout this period, rising by 183.8% and 11.7% year on year in 2025. This suggests that

demand for avocados in the EU is rising, but what about prices? However, despite growing competition from South American countries and Kenya, this is good news for South Africa for now.

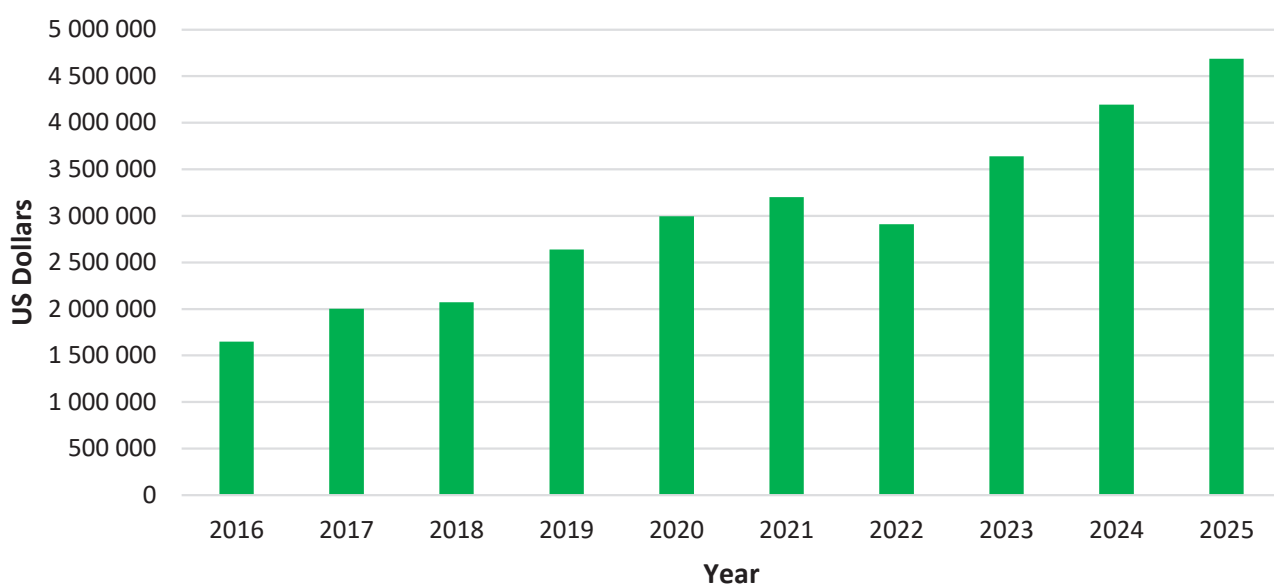


Figure 3: EU-27 avocado imports in value from 2016 to 2025

Source: Trade map and NAMC, 2026

2.3. Conclusion

The season began for South Africa with larger-than-normal fruit sizes, which initially matched European market needs. Although this is positive, rivalry and price pressure in Rotterdam and other European entry ports have increased due to heavy overlap with Peru and Kenya

during the May–August shipping window. Therefore, in light of these changes, South Africa’s 2026 export value recovery remains uncertain. To truly increase its presence and, consequently, export revenue, the Americas and Asia-Middle East markets are essential.



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3. Optimising South Africa's citrus export opportunities through the EU–SADC economic partnership agreement



Phelelani Sibiya

3.1. Background of EU–SADC economic partnership agreement

The European Union (EU)-Southern African Development Community (SADC) Economic Partnership Agreement (EU-SADC EPA) is a key framework for strengthening trade relations between the EU and Southern African countries. Signed in 2016, it provisionally entered into force in October 2016 and replaced the trade-related provisions of the Trade, Development and Cooperation Agreement between South Africa and the EU. Under the EPA, the EU fully or partially removed customs duties on 97.8% of South African imports in 2022, providing South African exporters with preferential access to one of the world's largest consumer markets (European Commission, 2026). The agreement is particularly important for agricultural products, where market access, tariffs, sanitary and phytosanitary (SPS) requirements, and consumer preferences shape export competitiveness.

2.3. Analysis of South Africa's citrus exports to Europe

South Africa's citrus industry is one of the country's most competitive agricultural export industries and plays an

important role in rural employment, foreign exchange earnings and agricultural value-chain development. The industry is highly export-oriented, with approximately two-thirds of production exported as fresh fruit, generating about 95% of total citrus industry earnings (Chisoro & Roberts, 2024). South Africa's competitiveness is supported by favourable climatic conditions, established production and packing infrastructure, advanced cold-chain systems and the industry's ability to respond to changing international market requirements. In 2025, South Africa exported approximately 2.9 million tonnes of citrus, overtaking Spain to become the world's largest citrus exporter by volume, as shown in Figure 4; this demonstrates the industry's strong production and export capabilities.

The EU remains South Africa's most important citrus export market, accounting for approximately 36% of the country's citrus exports in 2024. The Netherlands is the main entry point, receiving 68% of South African citrus shipments to the EU, followed by Portugal and Italy (CGA, 2025). The EU market is also supported by seasonal complementarity, as South Africa supplies

citrus during periods when European production is relatively limited. South Africa also exports 1% of total citrus exports to the rest of SADC countries (Trade Map, 2026). The SADC region also provides an opportunity for market diversification, particularly as regional demand

continues to increase. However, non-tariff measures, particularly SPS requirements, certification procedures and technical regulations, remain important constraints to regional agricultural trade (UNCTAD, 2016; UNCTAD, 2024).

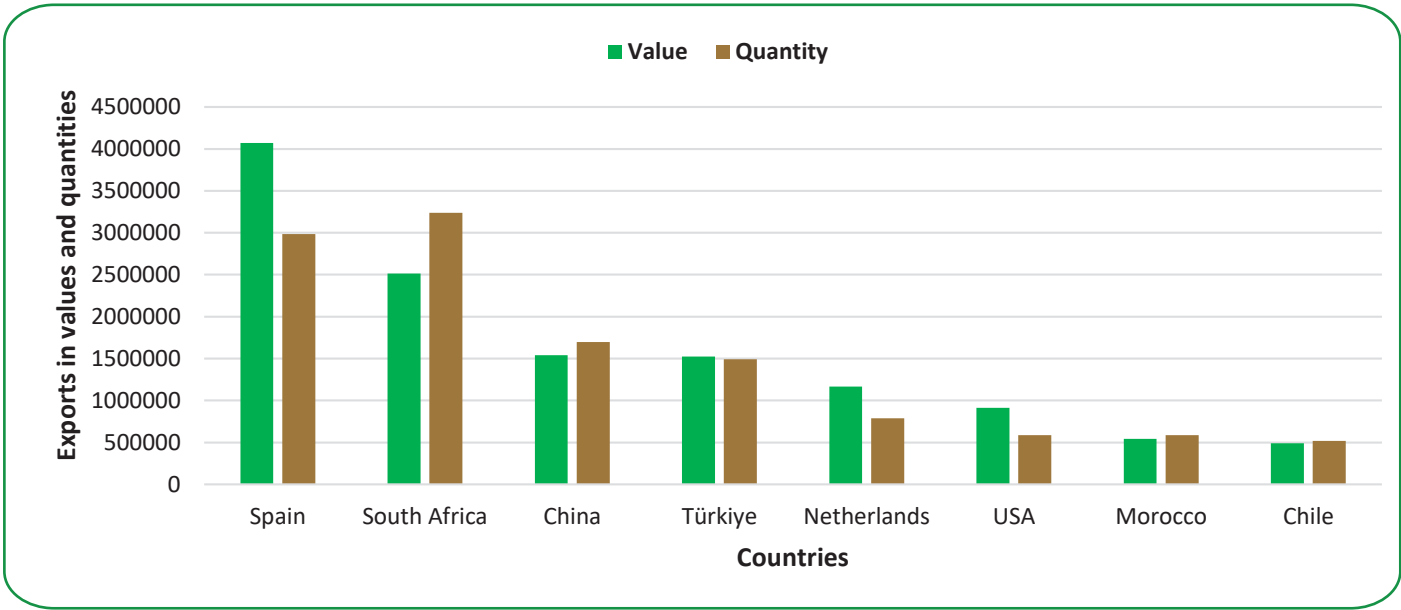


Figure 4: 2025 Leading global citrus exporters in value (thousand USD) vs Quantity (Tons)
Source: TradeMap, 2026

Figure 4 illustrates the leading global citrus exporters in 2025. South Africa exported approximately 3.24 million tonnes of citrus valued at US\$2.51 billion. Although South Africa exported a larger quantity than Spain, Spain

generated a substantially higher export value. China, Türkiye, the Netherlands, etc., were among the leading citrus exporters in 2025.

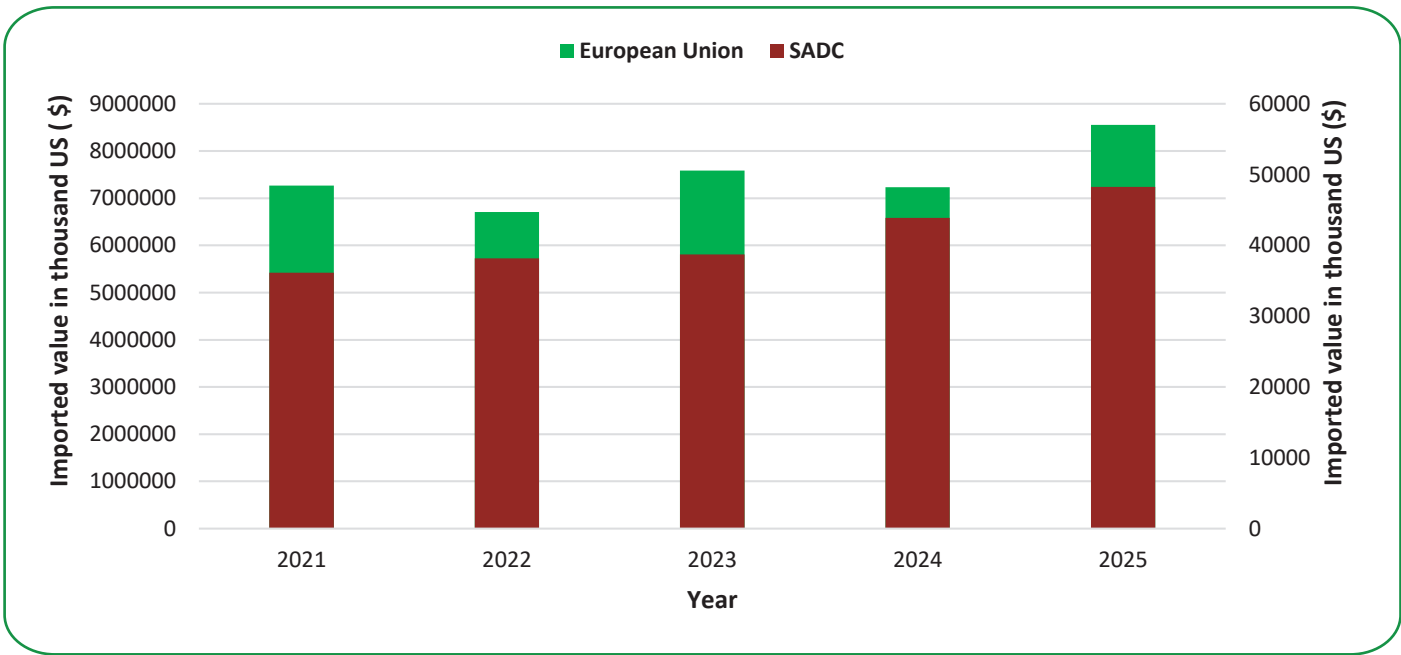


Figure 5: EU and SADC citrus imports between 2021 and 2025
Source: TradeMap, 2026

Figure 5 indicates EU and SADC citrus imports between 2021 and 2025. EU citrus imports increased from approximately US\$7.3 billion in 2021 to US\$8.6 billion in 2025, while SADC citrus imports increased from approximately US\$36 million to US\$48 million over the same period. In 2025, the EU and SADC accounted for 36% and 1% of South Africa's citrus exports, respectively.

The South African citrus industry faces significant challenges in both markets. In the EU, increasingly stringent SPS requirements, particularly on False Codling Moth and Citrus Black Spot, have raised compliance costs and created uncertainty about market access. South Africa's ongoing disputes with the EU over these measures show how non-tariff measures can affect competitiveness. In the SADC region, logistical constraints, fragmented regulatory requirements, customs procedures and other non-tariff barriers continue to limit intra-regional agricultural trade. These challenges are particularly important for citrus because it is highly perishable and requires efficient logistics and cold-chain infrastructure.

Product diversification provides one strategy through which South Africa can respond to these challenges and improve export competitiveness. The industry has already demonstrated the benefits of shifting towards

higher-value products. Chisoro and Roberts (2024) found that the expansion of soft citrus, lemons and limes played an important role in South Africa's export performance, as these products respond to changing consumer preferences and can command higher prices. Moving beyond traditional volume-based exports towards premium varieties, differentiated products, and processed citrus products such as juice, concentrates and citrus-derived products could increase the value generated from existing production.

3.3. Conclusion

In conclusion, the South African citrus industry continues to gain from the EU-SADC EPA. However, SPS requirements, logistics and non-tariff barriers remain significant constraints. South Africa should therefore pursue a strategy that combines stronger regulatory cooperation, improved logistics, market diversification and product upgrading. By shifting from simply exporting larger volumes to higher-value, differentiated citrus products, South Africa can improve its competitiveness, strengthen its position in the EU market and unlock emerging opportunities in SADC and the wider African market. Creating a framework to reduce tariffs and address barriers to intra-African trade will support the expansion of South Africa's citrus industry into SADC and broader African markets.

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4. Amid 2026 season hiccups, South Africa's orange exports down 17.2%

B

OPPORTUNITIES



Thabile Nkunjana

4.1. Background of South Africa's citrus situation

The Citrus Growers' Association of Southern Africa (CGA) reduced their pre-season projection of 209.4 million cartons of citrus to 205.3 million 15 kg cartons in 2026. The downgrade results from ongoing port challenges at Durban, crop damage from flooding in the Western and Eastern Cape, and geopolitical trade difficulties in the Middle East. This season, it's also crucial to watch global orange prices, which have fallen significantly in 2026 for several reasons, according to World Bank data. Given the difficulties listed above, this decline is not surprising.

4.2. Market analysis of whether there are still opportunities for orange exports

The most recent World Bank data for June and July of 2026 show that orange prices have fallen to levels last

seen in March 2022 due to weaker consumption demand and lag, where lower producer prices take time to reach store shelves, even though prices vary by region globally. Ten years of high retail prices are expected to deter consumers worldwide, resulting in an additional 3% drop in orange consumption. Orange prices per kilogram in US dollars fell 39.7% year over year from US\$1.36 to US\$0.82 and 10.9% month over month from US\$0.92 to US\$0.82 in June 2026. They fell even further in July, down 48.7% year over year from US\$1.36 per kilogram in July 2025 to US\$0.78 per kilogram in July 2026 (see Figure 6).

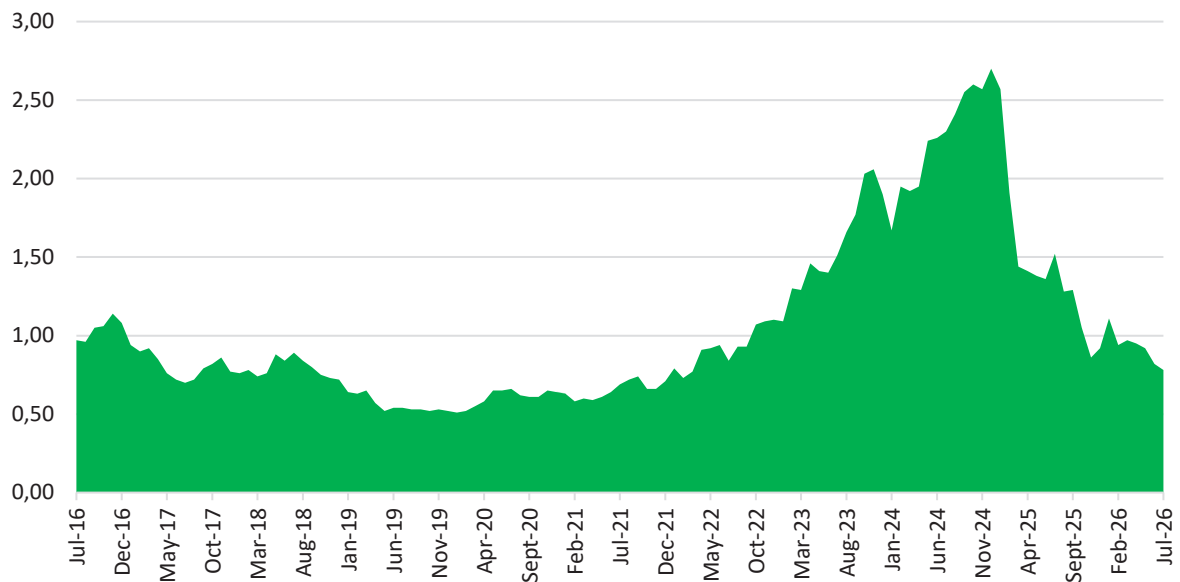


Figure 6: Global orange prices in USD/kg

Source: The World Bank and NAMC, 2026

This is concerning for a country like South Africa, where favourable weather during the 2025 production period was expected to produce another record-breaking citrus export volume. Figure 7 shows the value of South Africa's orange exports over the previous ten years. Although South Africa's orange exports have not increased

steadily over the period under observation, the trend shows a 68.6% increase over the last ten years and a 34.0% year-over-year increase from US\$758.7 million in 2024 to US\$1.0 billion at the end of 2025. Despite well-documented difficulties over the years, these figures show Parten's growth.

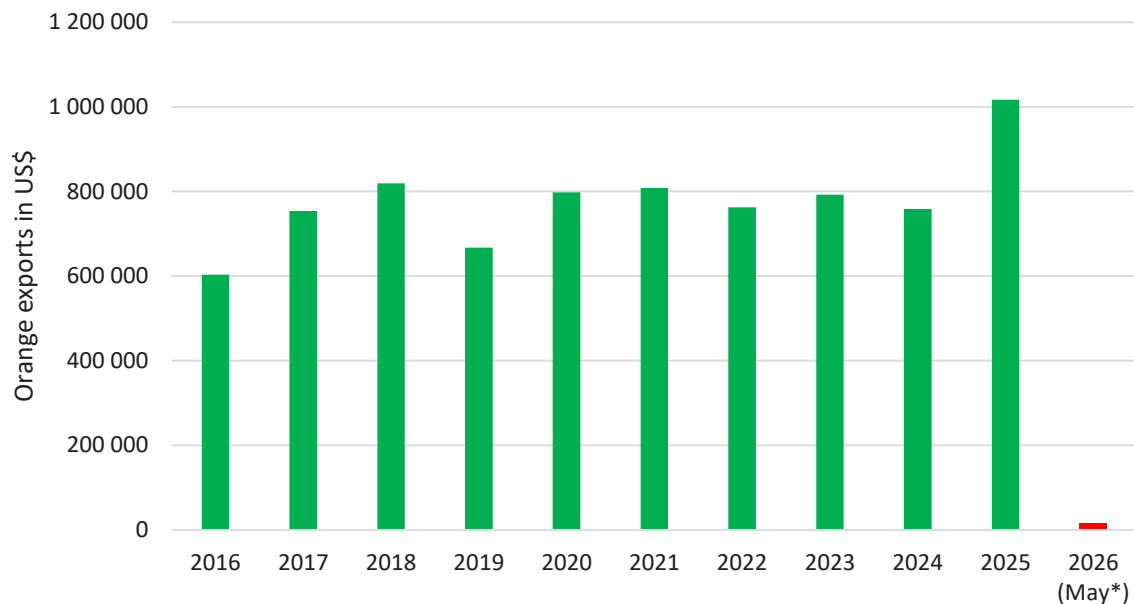


Figure 7: South Africa's orange exports in value (US\$) from 2016 to 2026 (May*)

Source: Trade map and NAMC, 2026

4.3. Conclusion

These difficulties may indicate a poor season as South Africa's orange season draws to a close in October, but a notable improvement in global prices or better supply chains in the Middle East from August to the end of the

season could help. According to trade data from the trade map, South Africa's exports decreased by 17.2% from US\$19.7 million to US\$16.3 million in the first five months of 2026. Again, considering the conflict in the Middle East and other situations, this is not surprising.



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5. Beyond market access: What South Africa's wheat trade with Poland reveals about agricultural trade resilience.



Mamakie Lungwana

5.1. Background of South Africa's citrus situation

The 10th anniversary of the European Union-Southern African Development Community (EU-SADC) Economic Partnership Agreement (EPA) offers an opportunity to examine not only trade growth but also the resilience of South Africa's agricultural supply chain. The EPA, which went into provisional application in October 2016, improved parties' market access and provided a more stable foundation for trade (European Commission, 2026). Trade between the EU and SADC countries has increased by 26% since 2016, while SADC exports to the EU have increased by 38% (European Commission, 2026).

5.2. Does the SADC-EU (EPA) provide opportunities for addressing wheat challenges for South Africa?

South Africa's structural reliance on imported agricultural products must be considered, alongside further

integration with global markets. Wheat is a key example. South Africa's wheat consumption has generally increased while domestic production has fluctuated without showing a consistent upward trend.

Average annual wheat production has remained at approximately 1.8 million tonnes, while domestic demand exceeds 3.8 million tonnes annually (Figure 8), necessitating substantial wheat imports to bridge the supply gap (Miller, 2025). This gap therefore increases the country's reliance on international markets for wheat.

This reliance raises concerns about the country's long-term wheat supply resilience, especially given climate-related production shocks, geopolitical tensions, and disruptions to global grain trade (Devadoss & Ridley, 2024; Dube et al., 2026).

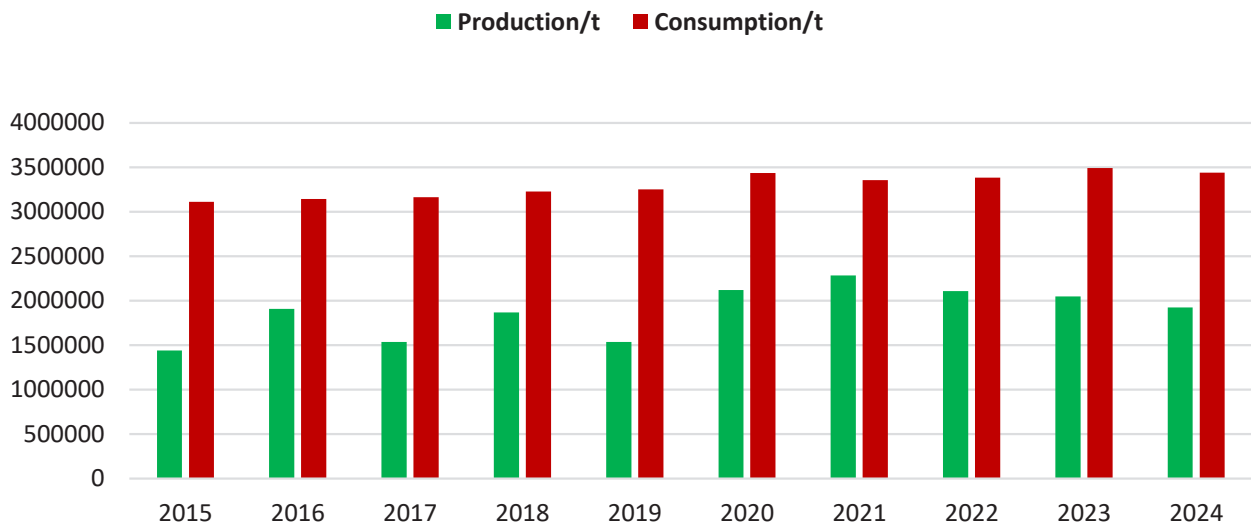


Figure 8: South Africa's Wheat Production versus Wheat Consumption.

Source: Author's own compilation (2026).

Poland is one of South Africa's suppliers of wheat. Figure 9 shows that wheat imports from Poland to South Africa increased from 48 518 tonnes in 2015 to 200 360 tonnes in 2024, but the relationship was far from linear. Wheat imports increased drastically to 773 157 tonnes in 2020

but declined thereafter, then increased again in 2023 to approximately 820 029 tonnes. Rather than following a simple trend of increasing dependence on wheat imports from Poland, supply has fluctuated.

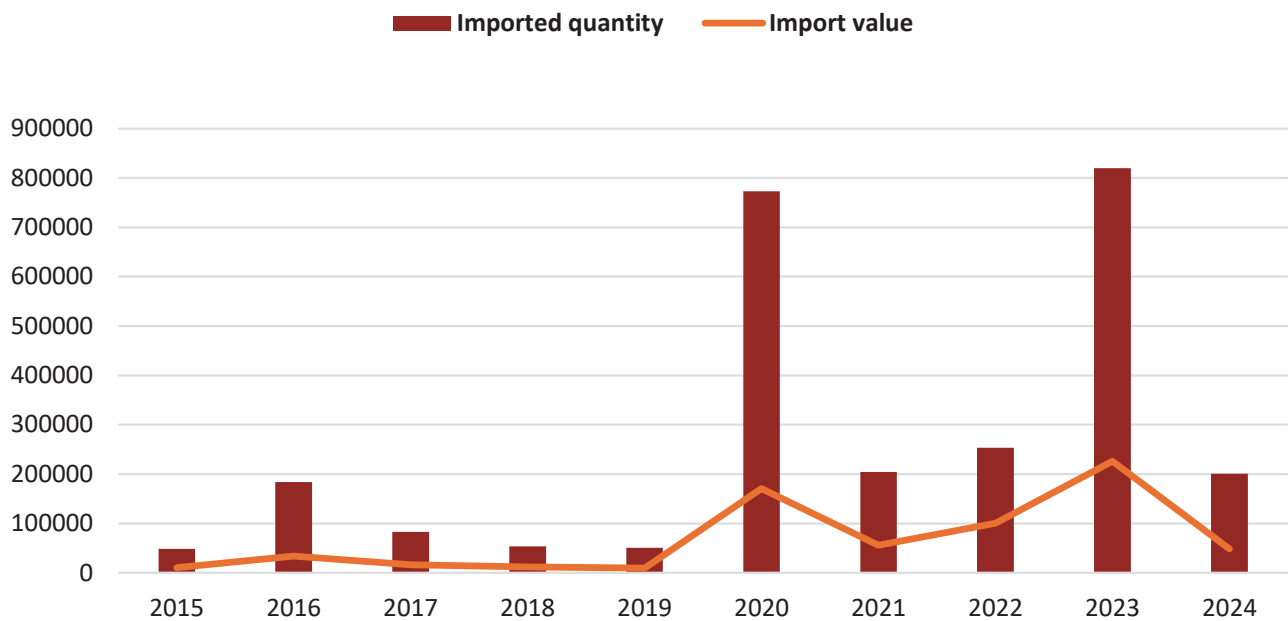


Figure 09: South Africa's wheat imports from Poland.

Source: Author's own compilation (2026).

Despite this fluctuation, South Africa has not reduced its dependence on imported wheat; rather, the composition of its import sources has changed. Major suppliers of South Africa's wheat include the United States, Latvia, Canada, Australia, Brazil, Romania, Lithuania, Russia, and Poland (RPO Vrystaat, 2026). Supplier diversification is good for supply security, but it still shows South Africa's ongoing exposure to international market conditions.

This is further supported by the structure of Poland's export market, which shows that South Africa is among its wheat destinations but not its largest market. In 2024, Germany alone imported approximately 1.47 million tonnes of wheat from Poland, compared with 255 089 tonnes imported by South Africa (WIT, 2024). The United Kingdom and Angola were also significant destinations. This shows that South Africa competes with established markets for access to Polish wheat. This raises a crucial policy consideration: preferential or predictable trade relations do not necessarily guarantee supply during periods of tight export availability or global disruptions. Therefore, the policy implication is not that South Africa should reduce agricultural trade with the EU; rather, the

next decade of the EU-SADC EPA should also prioritise both market access and trade resilience. While South Africa maintains its relationship with its wheat suppliers, it should also strengthen domestic production capacity, improve climate resilience and invest in productivity-enhancing technologies (Dube et al, 2026). This is particularly important given the country's rising import dependency (SAGL, 2025).

The EU-SADC EPA has created a significant platform for agricultural trade. The second decade should ensure that deeper integration does not lead to greater vulnerability.

5.2. Conclusion

The wheat relationship between South Africa and Poland shows the need for a balanced strategy: using international markets to secure food supplies and diversify sources, while strengthening domestic productivity capacity. The aim should not always be more trade, but more resilient trade that supports food security and protects South Africa's ability to respond to future geopolitical, climatic, and market shocks.

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6. The EU–SADC EPA at 10: Securing South Africa’s agricultural future in a changing European market

B

OPPORTUNITIES



Walter Shiba

6.1. Background of South Africa’s presence in the European market

Ten years after its signature, the Economic Partnership Agreement (EPA) has expanded trade and improved market access for South African agricultural exports to the EU. The next decade of this agreement promises more opportunities but will likely be defined by shifts in logistics, sanitary and phytosanitary performance, verifiable supply chains, and the ability to turn sustainability requirements into a competitive advantage. South Africa can benefit significantly from this trade arrangement if its agricultural strategy continues to intensify efforts to combine market access with compliance readiness, resilient export logistics, product differentiation, and support that prevents smaller exporters from being excluded.

6.2. What opportunities have been capitalised on for the past decade?

The EU and six Southern African partners, namely

Botswana, Eswatini, Lesotho, Mozambique, Namibia and South Africa, signed the EU–SADC Economic Partnership Agreement (EPA) on 10 June 2016. It entered into provisional application for most partners on 10 October 2016, with Mozambique beginning provisional application in February 2018. The agreement provides asymmetric liberalisation, allowing SADC EPA states to protect sensitive products and use safeguards while receiving extensive access to the EU market (European Commission, 2026a; 2026b). For agriculture and fisheries, the EPA improved trading conditions for products such as wine, sugar, fisheries products, flowers and canned fruit. South Africa receives broader access than under the earlier Trade, Development and Cooperation Agreement, while product-specific quotas and rules of origin remain important in determining whether an individual shipment receives preferential treatment as depicted in figure 10 (European Commission, 2026a; 2026b).

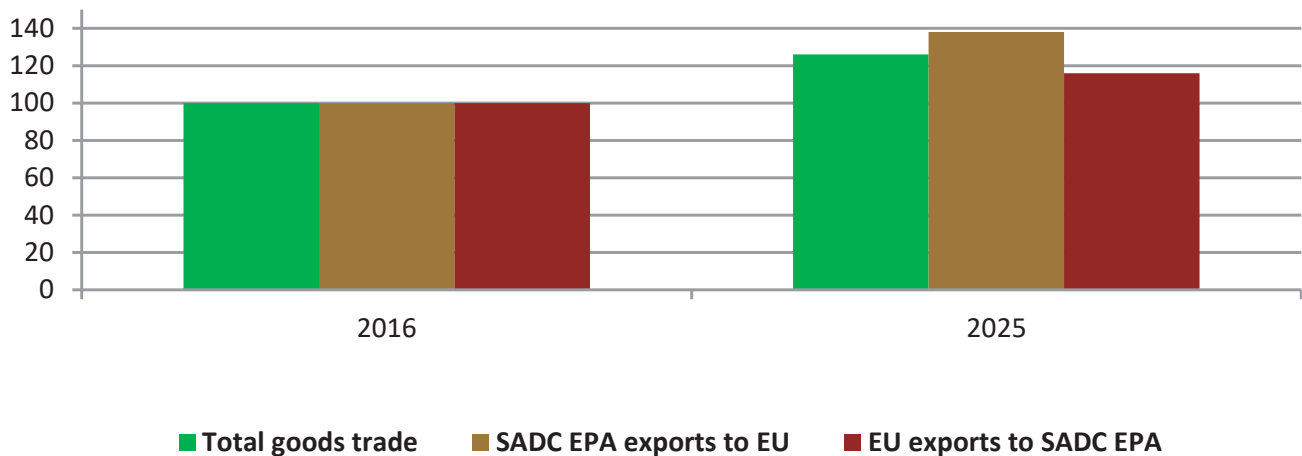


Figure 10: EU–SADC EPA goods trade growth since provisional application

Source: Author’s chart from European Commission (2026a). Index values are calculated from the Commission’s reported cumulative changes: total trade +26%, SADC EPA exports +38%, and EU exports +16% between 2016 and 2025.

South Africa’s agricultural exports reached US\$13.7 billion in 2024, 3% higher than in 2023. Africa absorbed 44% of the total, Asia and the Middle East 21%, the EU 19%, the Americas 6%, and the rest of the world, including the United Kingdom, at 10% as depicted in figure 11 (Agbiz,

2025). In 2025, total agricultural exports rose by a further 10% to a record US\$15.1 billion, supported by products such as table grapes, maize, berries, wine, citrus, apples and pears, sugar and nuts (Agbiz, 2026).

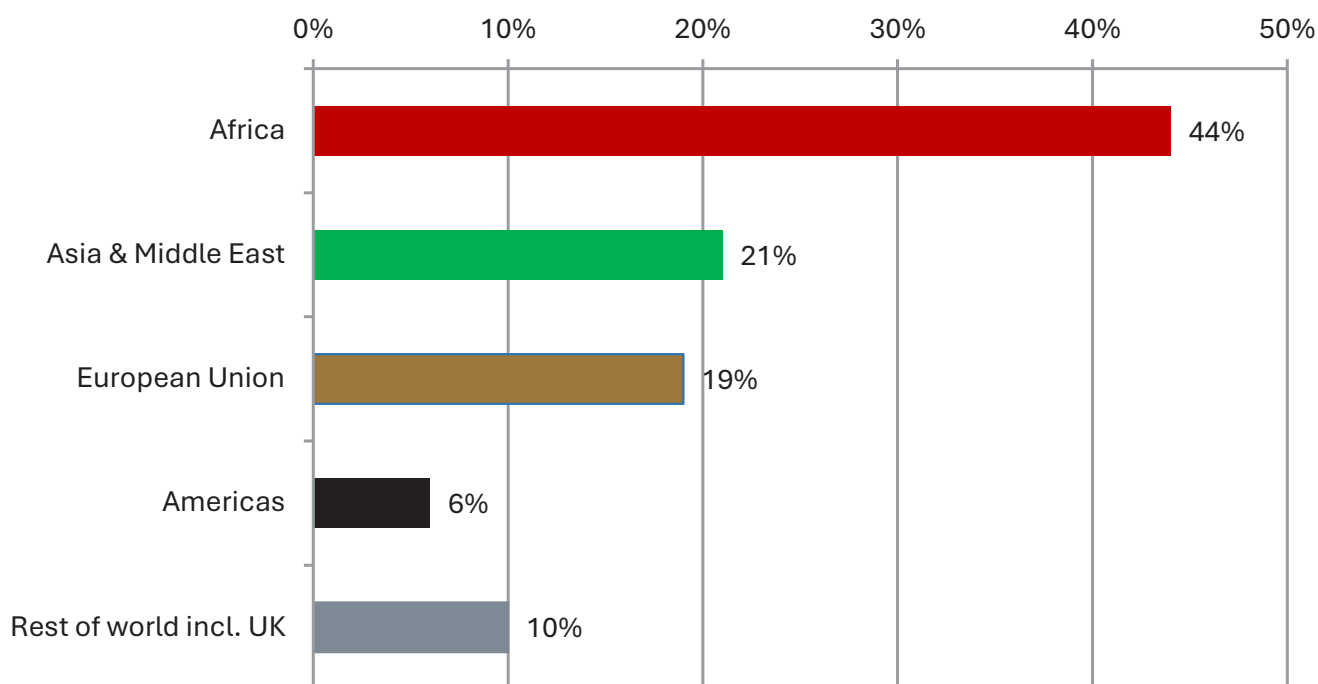


Figure 11: Destination mix of South Africa’s agricultural exports, 2024

Source: Author’s chart from Agbiz (2025). Shares sum to 100%.

The EU’s 19% share in 2024 made it South Africa’s third-largest regional agricultural market. Its importance is greater than the share alone suggests because the market is a major destination for high-value, employment-intensive products such as citrus, grapes, wine, avocados, berries, fruit juices, nuts, and wool (Agbiz, 2025). Retaining this market therefore supports foreign exchange earnings and rural value chains, while also providing a platform for premium positioning.

The competitive environment for South African agricultural exports is increasingly shaped by geopolitical disruptions, logistics inefficiencies, and evolving regulatory requirements. Rising transport costs, route disruptions, insurance premiums, and congestion can reduce the value of tariff preferences by delaying deliveries, particularly for perishable horticultural products where reliability is a critical component of market access. Although collaboration between Transnet, industry stakeholders, and logistics organisations has helped maintain export flows, ongoing port and rail challenges highlight the need for continued investment in cold-chain infrastructure, port efficiency, scheduling transparency, and alternative transport routes (Agbiz, 2025; 2026). At the same time, exporters must adapt to changing regulatory environments, including the EU Deforestation Regulation (EUDR), which applies

to specific commodities such as cattle, soy, wood, rubber, cocoa, coffee, and oil palm products, while broader traceability and sustainability expectations are increasingly influencing supply chains. Compliance with product-specific technical, food safety, sanitary, phytosanitary, and traceability requirements is therefore essential to maintain competitiveness, underscoring the need for robust and commodity-specific compliance systems rather than generic sustainability approaches (European Commission, 2026b; 2026c; 2026d).

The changing regulatory landscape requires exporters to respond strategically to a diverse set of compliance and market access requirements. While regulations such as the EU Deforestation Regulation (EUDR) apply only to specific commodities, exporters across the agricultural sector must also comply with sanitary and phytosanitary (SPS) measures, food-safety standards, rules of origin, quota provisions, and increasingly stringent sustainability expectations from retailers and consumers. These requirements differ by product, market, and buyer, reinforcing the need for commodity-specific compliance strategies. Table 1 summarises the main areas of regulatory exposure facing South African agricultural exporters, the products most directly affected, and the appropriate actions required to maintain market access and competitiveness in the European Union market.

Table 1. Regulatory exposure and the appropriate exporter response

Issue	Directly relevant products	Exporter response	Evidence
EUDR due diligence	Cattle and specified derived products; cocoa; coffee; oil palm; rubber; soy; wood	Map supply origins, retain legality evidence, improve geolocation data and agree data-sharing requirements with EU buyers.	European Commission (2026c; 2026d)
SPS and food-safety controls	Fresh produce, animal products and processed food	Maintain audit-ready records, pest and disease controls, residue compliance, certification and rapid corrective-action procedures.	European Commission (2026b)
Rules of origin and quotas	Products claiming EPA preferences	Confirm classification, origin documentation, quota conditions and proof-of-origin requirements before shipment.	European Commission (2026b)
Retailer sustainability requirements	Potentially broad, depending on the buyer	Treat verified environmental and social performance as a market-differentiation tool while avoiding unsupported claims.	Commercial requirement; firm-specific

Source: European Commission (2026b; 2026c; 2026d).

6.3. Where the next decade's opportunities lie

South Africa's strongest opportunity is not simply to ship more of the same products. It is to deepen participation in value chains where seasonality, quality, origin and production capability provide an advantage. Citrus, table grapes, avocados, berries, nuts, wine and processed fruit remain strong because they already have an export base and feature prominently in South Africa's trade with the EU (Agbiz, 2025; 2026).

The EPA's geographical indications protocol also creates a foundation for differentiated marketing. Names such as Rooibos, Stellenbosch and Paarl receive protection

in the EU, helping producers connect product identity with place, quality and reputation. This is commercially useful only when supported by consistent quality, collective marketing and enforcement against misuse (European Commission, 2026b). Digital traceability can serve two purposes: compliance for products and buyers that require it, and a credible market story for products sold on origin, environmental performance or ethical sourcing. The greatest risk is a two-tier export sector in which large firms can finance sophisticated systems while smaller producers are excluded. Shared platforms, extension support and group certification can reduce that risk.

Table 1. Regulatory exposure and the appropriate exporter response

Priority	Lead actors	Immediate action	Success indicator
Protect existing EU access	Department of Trade, Industry and Competition; Department of Agriculture; industry bodies	Create a product-level dashboard covering tariffs, quotas, SPS alerts and regulatory changes.	Fewer avoidable border rejections and higher utilisation of available preferences.
Improve export logistics	Transnet, ports, logistics firms, producer-exporters	Prioritise cold-chain reliability, equipment availability, transparent scheduling and contingency routes.	Lower dwell times, fewer missed sailings and reduced spoilage or claims.
Build proportionate traceability	Exporters, certification bodies, technology providers	Start with high-risk products and buyer requirements; use interoperable records rather than duplicative systems.	More suppliers able to provide verified origin and compliance evidence at reasonable cost.
Differentiate South African products	Commodity associations, exporters, provincial agencies	Link quality, geographical indications and credible sustainability claims to coordinated promotion.	Higher-value sales, stronger brand recognition and improved price realisation.
Include small and emerging exporters	Government, industry associations, development-finance institutions	Provide shared audit preparation, group certification, market intelligence and targeted finance.	Broader exporter participation without weakening compliance performance.

Source: Author's recommendations, informed by European Commission (2026b–d) and Agbiz (2025; 2026).

6.4. Conclusion

The EU–SADC EPA has delivered a stronger trade platform. Ten years after signature, trade in EU–SADC EPA goods are substantially above its 2016 level, and South Africa remains a competitive supplier of high-value agricultural products. Yet the next decade will be more demanding. Tariff preferences will matter, but so will port reliability, product-specific compliance, traceability, credible sustainability performance and the ability to differentiate

South African products. The policy objective should therefore be broader than preserving preferences. South Africa should use the EPA as an organising framework for export competitiveness: protect current access, reduce logistics costs, prepare early for changing requirements, support smaller exporters and build stronger product identities. If these elements are aligned, the agreement’s second decade can deliver not only more trade but also more resilient and inclusive agricultural value chains.



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A. Goods barometer points to resilient trade growth despite headwinds

Link available at: https://www.wto.org/english/news_e/news26_e/wtoi_09sep26_481_e.htm



Global merchandise trade remains above trend, but the expansion remains uneven and increasingly exposed to geopolitical and energy-price risks. The WTO Goods Trade Barometer rose to 102.0 in July 2026, up from 101.7 in June, signalling continued above-trend trade growth into the third quarter. World merchandise trade volumes were 3.2% higher year on year in 2026Q1, while the WTO projects 1.9% growth for 2026 under its baseline. That forecast falls to 1.4% under a high-energy-price scenario,

implying a 0.5 percentage-point growth penalty from Middle East-related energy disruption. Conversely, sustained AI investment could add approximately 0.5 percentage points to global merchandise trade growth. The barometer's composition reinforces this divergence: electronic components reached 104.9, export orders 103.5, air freight 102.8, agricultural raw materials 102.6, and automotive products 101.5. Only container shipping, at 99.6, remains below trend.

B. Commission launches consultation on the first review of the International Procurement Instrument

Link available at: https://policy.trade.ec.europa.eu/news/commission-launches-consultation-first-review-international-procurement-instrument-2026-09-10_en

The European Commission has opened the first formal review of the EU International Procurement

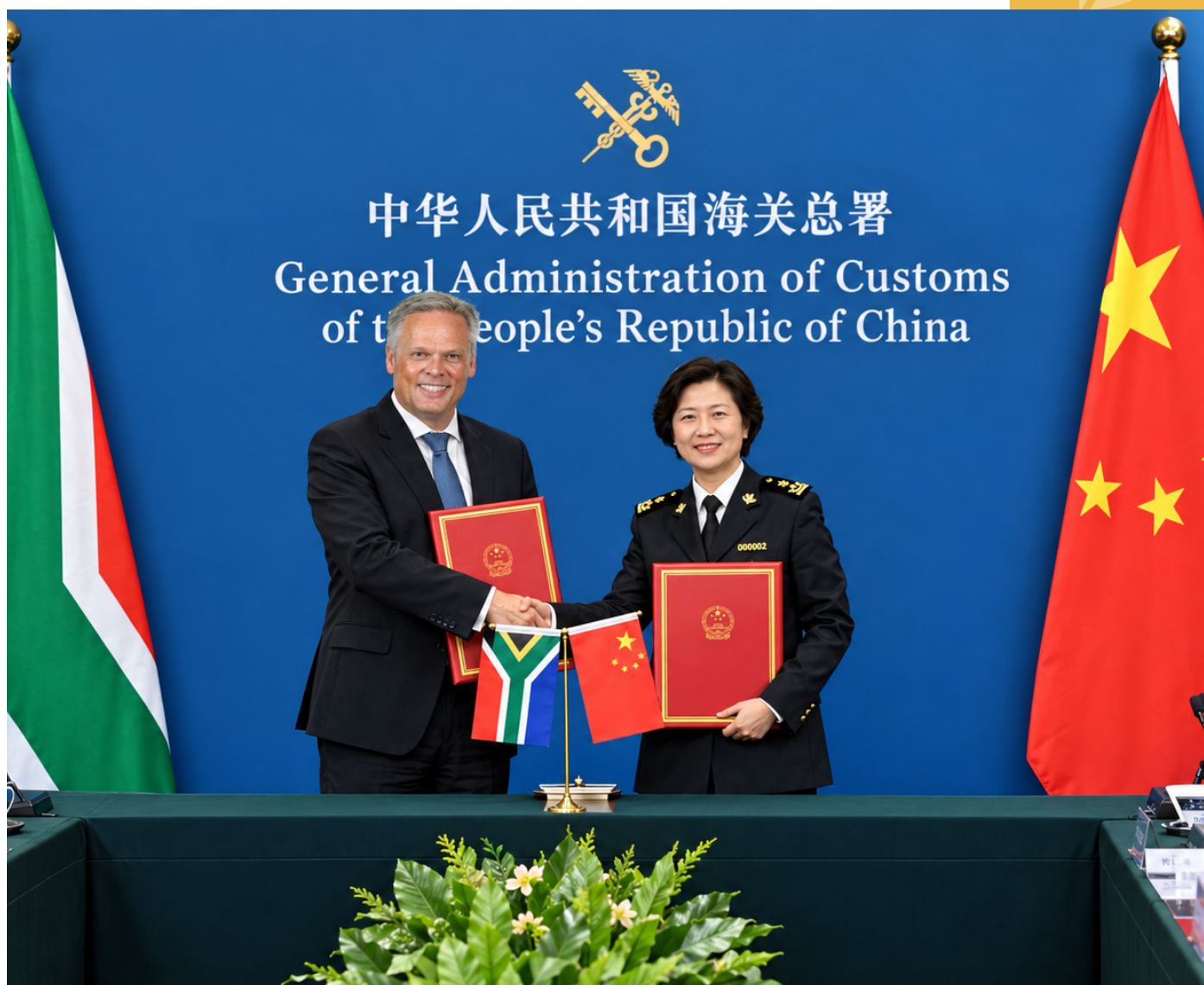
Instrument (IPI), signalling a harder stance on reciprocity in access to public procurement markets. The 12-week consultation, running from 4 September to 27 November 2026, will assess the scope, functioning and efficiency of Regulation (EU) 2022/1031, with particular scrutiny of rules of origin, investigation procedures, application thresholds, tenderer obligations, exemptions and the design of IPI measures. The economic issue is asymmetric market access: EU procurement remains relatively open while European firms can face restrictive or discriminatory procurement regimes abroad. The IPI gives the Commission leverage to investigate such barriers and, where negotiations fail, restrict access to the EU's own procurement market, effectively converting procurement access into an instrument of trade-policy reciprocity and bargaining power.

B. Protocol opens market for SA's cherries to be exported to China

C

TRADE NEWS

Link available at: <https://www.sanews.gov.za/south-africa/protocol-opens-market-sas-cherries-be-exported-china>



South Africa has secured first-time access to China's cherry market after signing a new sanitary and phytosanitary (SPS) protocol in Beijing on 8 September 2026. The agreement is commercially significant because China is the world's largest cherry importer, purchasing approximately 586,900 tonnes valued at US\$3.3 billion (R52.8 billion) in 2025. The protocol also sits within the broader Framework Agreement on Economic

Partnership for Shared Development, under which South African products receive 0% tariff access to the Chinese market. This is the second agricultural market-access protocol concluded with China within a year, indicating faster resolution of SPS barriers and a widening of South Africa's export basket into a large, high-value horticultural market.

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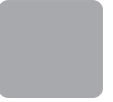
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