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Prospects of South Africa's agro-food trade under the COMESA-EAC-SADC Tripartite Free Trade Area

Boosting mung bean exports: leveraging trade agreements to position South Africa as a key global player

South Africa greenlights Brazilian maize imports

agriculture, land reform & rural development
Department:
Agriculture, Land Reform and Rural Development
REPUBLIC OF SOUTH AFRICA

NAMC
Promoting market access for South African agriculture

FOREWORD

Welcome to the ninety-seventh (98th) issue of the Trade Probe publication produced under the Markets and Economic Research Centre (MERC) of the National Agricultural Marketing Council (NAMC). The Trade Probe is co-produced by the NAMC and the Department of Agriculture, Land Reform, and Rural Development (DALRRD).

In recent years, South Africa has concluded several trade protocols (i.e., MoUs) and agreements with the rest of the world to expand its export footprint. Given these new opportunities, it is important to explore the growing export and production opportunities, as well as trade diversion created by the new protocols and agreements. Therefore, the focus of this issue is on exploring local agricultural production and export opportunities created by new trade protocols and agreements.

Guided by the mandate of the NAMC, the current issue of the Trade Probe seeks to inform policymakers, producers, traders, and other stakeholders about strategies to boost market access for South Africa's agricultural products and leveraging on the several trade agreements and protocols.

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CONTRIBUTORS

Dr Solly Molepo | Ms. Lesedi Mokoena | Ms Nokuthula Khulu | Mr. Bernard Manganyi | Mr. Bhekani Zondo | Mr. Buhlebemvelo Dube | Mr. Lwazi Dladla | Mr. Phelelani Sibiya | Mr. Thabile Nkunjana | Mr. Thulani Ningi

PROSPECTS OF SOUTH AFRICA'S AGRO-FOOD TRADE UNDER THE COMESA-EAC-SADC TRIPARTITE FREE TRADE AREA

By Bhekani Zondo

In the African continent, the South Africa remains the largest food producer and exporter. The country's agricultural sectors' performance is largely underscored by the government's role in opening new export markets through the signing of regional trade agreements, among other things. For example, South Africa is a member is the Southern Africa Customs Union (SACU), the Southern African Development Community (SADC) Free Trade Area (SADC-FTA), and recently the African Continental Free Trade Area (AfCFTA).

All these trade agreements have seen the African continent accounting for the largest share of South Africa's agricultural exports (42%) due to somewhat duty-free access to this market (Trade Map, 2024). On the 25th of July 2024, the African free trade agreement between the Common Market for Eastern and Southern Africa (COMESA), Southern African Development Community (SADC) and East African Community (EAC) known as the COMESA-EAC-SADC Tripartite Free Trade Area (TTFTA) (established in 2008) came into force (COMESA, 2024). The TTFTA members states (including South Africa) together contributes 53% of the African Union's membership, more than 60% of continental GDP ($1.88 trillion), and a combined population of 800 million.

The Tripartite framework is based on the following three pillars: firstly, market Integration, which involves trade liberalization through the creation of a Free Trade Area and arrangements for the movement of business persons; Secondly, infrastructure Development, which focuses on enhancing connectivity and reducing business costs; and lastly, industrial Development, aimed to create a supportive environment by improving regulatory and legal frameworks, adding value, diversifying industries, increasing productivity and competitiveness, and implementing programmes for structural change (COMESA, 2024). Hence, the aim of this article is to analyze the prospects of increasing South Africa's agro-food trade under the TTFTA.

Figure 1 below depicts South Africa's agro-food trade with the three RECs in value terms. The SADC region accounts for the largest share of South Africa's agro-food trade with a share of 34% of overall agricultural exports to the world and 15% of imports. Whereas only 14% and 3% of South Africa's agricultural exports are destined for COMESA and EAC, respectively. In addition, the COMESA and EAC accounts for 9% and 1% of South Africa's agricultural imports, respectively. Both South Africa's imports and exports of agricultural products with SADC and COMESA has been exhibiting a positive trajectory over the past decade.

South Africa's agricultural exports to the EAC have been relatively stagnant although they slightly increased between 2021 and 2023. Between 2019 and 2023, South Africa intensified its exports to the COMESA and EAC RECs, growing by 102% and 106%, respectively while exports to SADC only grew by 60%. Similarly, South Africa's agricultural imports from the three RECs have also been increasing with imports from EAC recording the highest growth rate of 133%. Whereas imports from COMESA and SADC grew by 38% and 36% respectively.

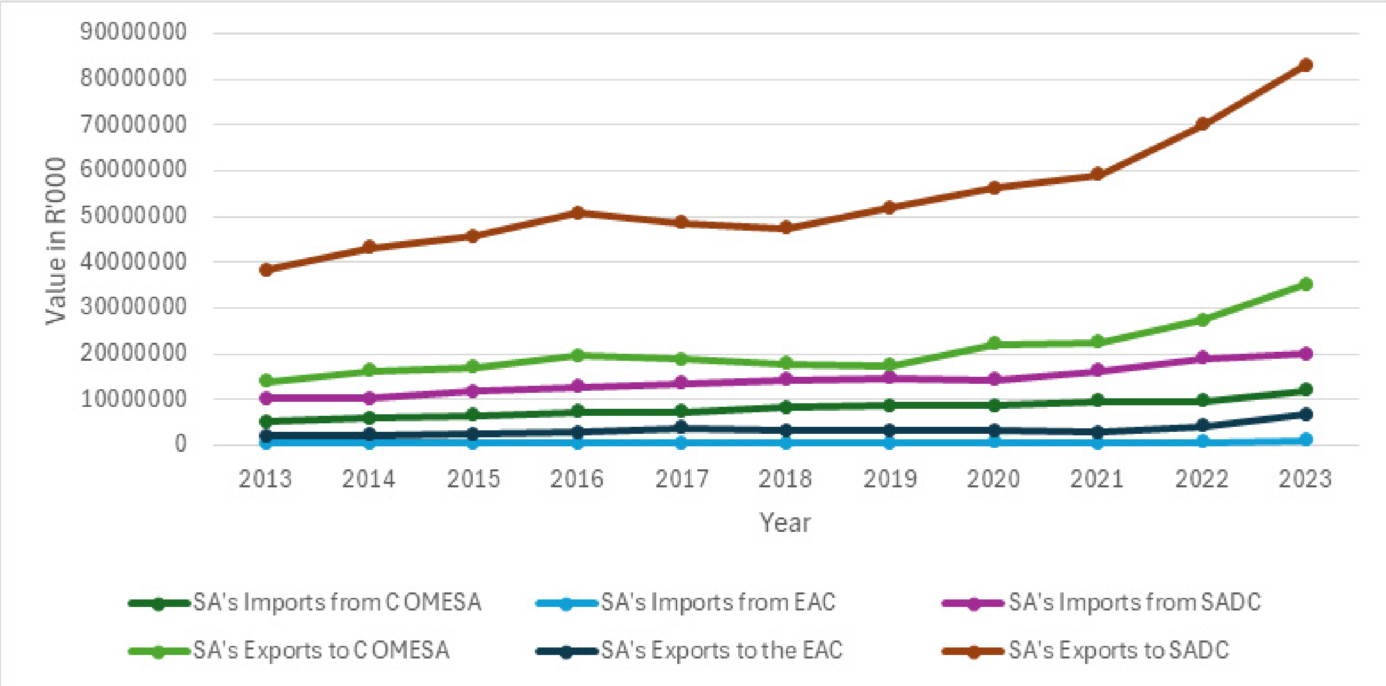

Figure 1: South Africa's agro-food trade within the selected RECs
Source: Trade Map (2024)

Currently, Botswana is the leading export market for South Africa's agricultural products destined for the SADC aggregation, followed by Namibia, Mozambique, Zimbabwe, and Lesotho. The leading exportable commodities to the SADC region are maize, wheat and meslin, groats and meal of maize, and food preparations, among others. In COMESA, Zimbabwe, Eswatini, Zambia, Democratic Republic of Congo (DRC), and Kenya, are currently the leading importers of South Africa's agricultural products. The leading agricultural exports to COMESA include maize, wheat and meslin, crude soybean oil, and groats and meal of maize. On the other hand, in the EAC; the DRC, Kenya, Tanzania, Uganda, and Somalia are the leading export destinations for South Africa's agricultural products. These products include, groats and meal of maize, undenatured ethyl alcohol, maize, wine, and fresh apples. South Africa's agricultural imports from the three RECs include coffee, black fermented tea, tobacco, oilcake, fresh cut roses, sugarcane, uncooked pasta, live cattle and sheep, among others.

Table 1 below illustrates South Africa's export potential for several selected leading exportable agricultural commodities to Eastern and Southern Africa. The export potential is measured in million United States Dollars (US$). The results show that in Southern Africa, maize exports to this region have the highest export potential of US$351 million followed by crude soil bean oil (US$131 million), groats and Maize meal (US$97 million), and fresh apples (US$78 million). In addition, maize exhibits the highest unrealized export potential worth a value of US$110 million to this region, followed by crude soya bean oil, groats and maize meal, apples, and wine.

Author: Mr. Bhekani Zondo is an Economist under the Trade Research Unit at the National Agricultural Marketing Council. He can be contacted at bzondo@namc.co.za or (012) 341 1115.

Table 1: South Africa's export potential of selected leading exportable agricultural commodities to Eastern and Southern Africa

Commodity	Export Potential	Unrealized Potential	Export Potential	Unrealized Potential
	US$ Million		US$ Million	
Maize	351	110	27	22
Groats and Maize meal	97	33	3.3	2.9
Wheat & Meslin	55	6.6	21	21
Crude soya bean oil	131	40	1.8	1.8
Apples	78	39	45	19
Wine (> 2L)	35	18	26	4.1
Table grapes	18	9.3	14	9.6
Sugarcane	46	18	34	31

Source: ITC Export Potential Map (2024)

In Eastern Africa, exports of apples to this region have the highest export potential of US$45 million followed by sugarcane, wine, and wheat and meslin. Sugarcane exports exhibit the highest unrealized export potential worth a value of US$31 million to this region, followed by maize, wheat and meslin, apples, and table grapes.

In conclusion, South Africa's agro-food trade under the TTFTA presents promising growth opportunities. The integration of these RECs offers South Africa enhanced access to a vast market, with potential for significant export expansion, particularly for commodities like maize, crude soybean oil, apples, and wine. While the SADC region currently dominates South Africa's agro-food exports, there is untapped potential in COMESA and EAC markets, especially in Eastern Africa. Effective use of the TTFTA framework, focusing on market integration, infrastructure development, and industrial growth, could drive further growth in South Africa's agricultural trade, diversify export destinations, and strengthen the country's position as a leading food producer and exporter on the continent.

LEVERAGING AFCFTA AND THE GUIDED TRADE INITIATIVE SYNERGIES

By Buhlebemvelo Dube

Since 2019, the African Continental Free Trade Area (AfCFTA) agreement has been signed by 54 out of 55 African Union members and about 48 members have ratified their national legal instruments, positioning it as one of the most gargantuan free trade agreements globally (Trade Law Center, 2024). The objective of the AfCFTA is to create a single market for goods and services, substantially eliminate tariffs and non-tariffs barriers, cooperate on trade related areas, customs and trade facilitation measures, and establish a mechanism for the settlement of disputes. Furthermore, the Guided Trade Initiative (GTI) was established as a pilot program of the AfCFTA and launched by 8 countries and 31 countries have joined since 2022. Its aim is to galvanise meaningful trade amongst member states, evaluate the readiness of the private sector, institutional, legal, operational, and trade policy environment as well as sending a positive message to African economic operators and firms regarding the AfCFTA (Konrad-Adenauer-Stiftung, 2023).

The AfCFTA unlocks new trade opportunities for South Africa outside SACU (Southern African Customs Union) and SADC-FTA, in regions with no preferential agreements. The aim of this article is to outline how the AfCFTA and the GTI will boost South African agricultural exports.

OVERVIEW OF SOUTH AFRICA'S AGRICULTURAL EXPORTS TO AFRICA

The South African agriculture sector is export-driven and has steadily expanded with an export value of R91.6 billion in Africa (Trade Map, 2024). The Figure 1 below highlights South Africa's agricultural exports to Africa for the past five years. Botswana, Namibia, Mozambique, Zimbabwe, and Lesotho are the major destinations. Additionally, maize, wheat, fresh apples, food-preparations, and crude soya-bean oil are primary agricultural goods exported to Africa. As a member of SACU, South Africa benefits from a common customs territory and common external tariff, hence exports are concentrated within SACU.

Author: Mr. Buhlebemvelo Dube is an Economist under the Trade Research Unit at the National Agricultural Marketing Council. He can be contacted at bdube@namc.co.za or (012) 341 1115.

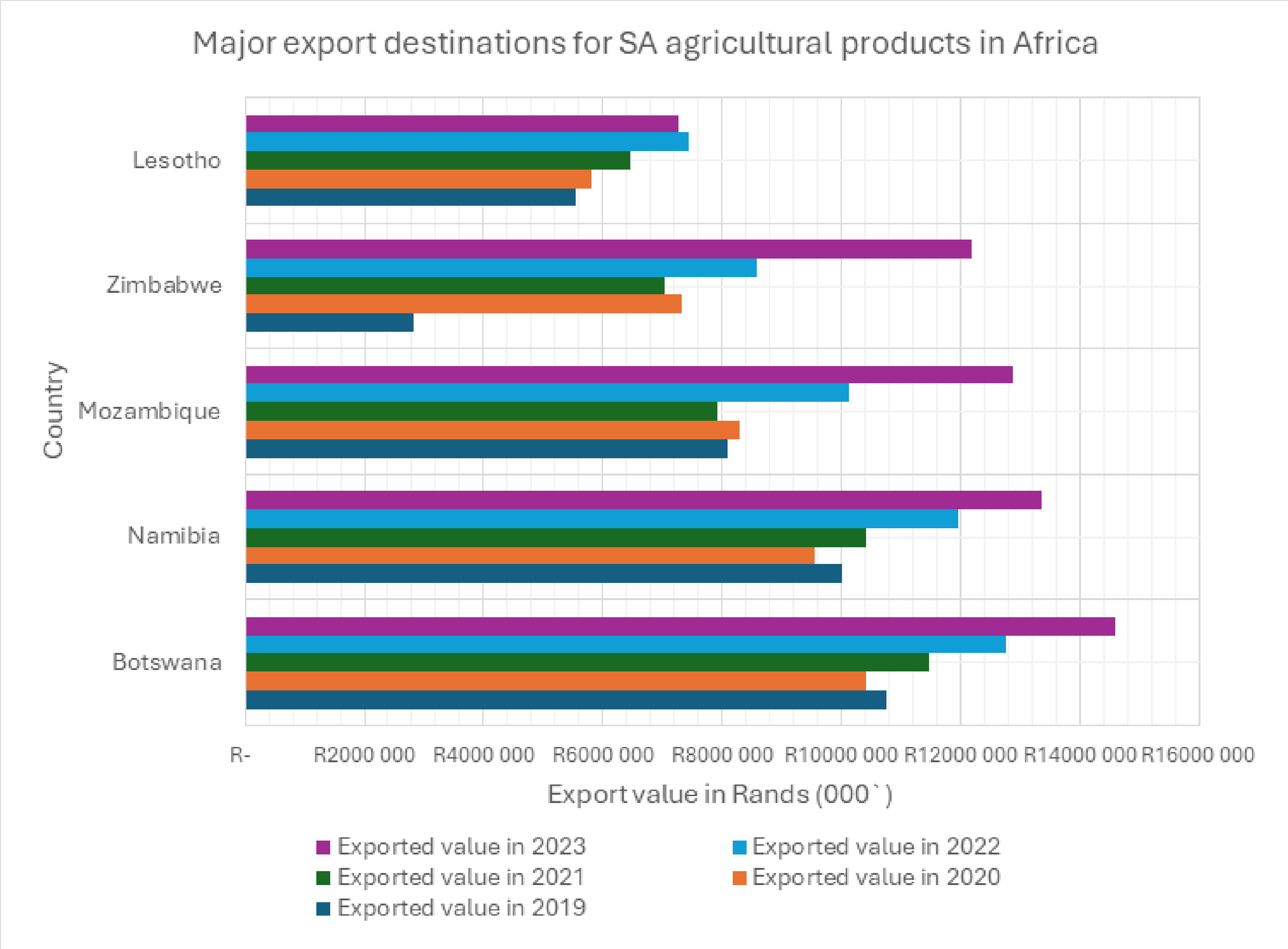

Figure 1: South African agricultural export to Africa in the past five years
Source: Trade Map (2024)

SOUTH AFRICA'S AGRICULTURAL EXPORT OPPORTUNITIES PRESENTED BY AFCFTA AND GTI

Table 1, illustrates leading countries with realistic export opportunities according to the decision support model (trade advisory), developed by North-West University (2022). South African agricultural sector has the opportunity to diversify its export basket and market through the AfCFTA-38 (38-additional countries which South Africa will have preferential trade under the AfCFTA but do not yet have free trade with). Egypt, Morocco, Algeria, Sudan, Senegal, Nigeria, and Ghana have higher realistic export opportunities.

Table1: Leading countries for South Africa's realistic agricultural export opportunities

	COUNTRY	Total realistic export potential to target Market(s)(Mn)[Rand]:	Total exports from South Africa to target market(s)(Mn)[Rand]:	Total exports from South Africa/target Market(s)Total imports%
1.	Egypt	5910	10	0.0%
2.	Morocco	3267	14	0.1%
3.	Algeria	1706	138	1.2%
4.	Sudan	1358	59	0.7%
5.	Senegal	1202	82	1.0%

Source: Hoyi et al. (2023)

Table 2 highlights product with realistic export opportunities in Africa. Maize, sugar, glucose, tobacco, and wine have comparatively higher penetration to the 38 additional new markets as outlined in the table.

Table 2: Top 3 realistic product opportunities to Africa.

Region	Product(6HS)	Realistic export opportunity for South Africa (Million-Rand)	South Africa total exports (Million- Rand)	Revealed Comparative Advantage (RCA)
AfCFTA (excl SADC)	-Maize (HS100590) -Sucrose sugar (HS170199) -Vegetable oils (HS150710)	6088 2319 1915	126 4.1 0.00	2.2 2.1 1.1
SADC12	-Vegetable Oils (HS150710) -Rice (HS100640) -Sucrose sugar (HS170199)	180 169 153	769 117 100	1.1 1.3 2.1
North-Africa	-Maize (HS100590) -Vegetable Oils Soya (HS150710) -Sucrose sugar (HS170199)	5927 1915 1738	0 0 1	2.2 1.1 2.1
EAC	-Sucrose sugar (HS170199) -Maize (HS100590) -Cane Sugar (HS170114)	1422 161 102	59 126 9	2.1 2.2 3.8
Central-Africa	-Undenatured-ethyl alcohol (HS220710) -Sucrose sugar (HS170199) -Groats/Meal (HS110313)	102 100 74	55 0 230	2.4 2.1 26.3

Source: Hoyi et al. (2023)

South Africa further has trade opportunities under GTI with Algeria, Cameroon, Egypt, Ghana, Kenya, Rwanda, and Tunisia (SARS, 2024). Commodities that are earmarked in the GTI include horticultural goods, avocadoes, palm oil, coffee, and honey.

CONCLUSIONS AND RECOMMENDATIONS

South African agricultural exports have been concentrated within SACU and the AfCFTA plus GTI unlock export opportunities and diversifies the export basket which stimulates domestic production. Free trade area agreements enable African countries to optimise their agricultural trade potential thus sparking sustainable economic growth. It is critical for domestic producers to anticipate strong competition since trade has to be fair, equitable and reciprocal. South African agriculture sector has favourable potential in some regions and commodities, thus, focusing on those regions with the highest positive benefits for the industries is crucial.

South Africa-Vietnam bilateral trade protocol to boost the citrus industry exports

By Thabile Nkunjana

After several months of negotiations, South Africa and Vietnam signed a new bilateral trade protocol in March 2024. This was good news coming up to the 2024 citrus export season, since South Africa's markets are becoming more and more dependent on Asia and the Middle East. Over the past five years, South Africa's overall citrus exports have increased by 36.3% in value terms (USD), from USD1.36 billion in 2019, to USD1.86 billion. The top markets are European Union (EU), Asia-Middel East, Americas and Africa.

The Minister of agriculture is under pressure to protect South Africa's current export markets and expand into new ones due to the ongoing trade dispute between the EU and South Africa for citrus. This is becoming more and more significant over time, as the industry's output rises, and more farmers enter it because of transformation initiatives, amongst other things. This trade protocol comes after the much-discussed "discrimination" against South African citrus fruit exports to the EU, which is its biggest export market, due to the enforcement of additional sanitary and phytosanitary (SPS) measures to control false coddling moth and citrus black spot. The bilateral agreement between South Africa and Vietnam also coincides with a critical moment for South Africa, which needs market expansion for its citrus products. This article focuses on Vietnam's orange imports and explores its' potential to boost South Africa's orange exports given the rising restrictions and tensions between South Africa and the EU.

Using Trade Map data, Figure 1 shows the evolution of Vietnam's orange imports over time. One country that has experienced a sharp rise in orange imports is Vietnam, whose imports of the fruit ranged from 20,000 tonnes in 2018 at a value of R216.5 million to 44 000 tonnes at a value of R647.1 million in 2022. Vietnam has seen an almost 200% increase in orange imports throughout the last five (5) years, from 2018 to 2022. Although having access to the market is fantastic news for South Africa, the country will have to contend with competition from Egypt, which is amongst the world's largest suppliers of citrus products. In terms of value, Egypt supplied 25% of Vietnam's orange supply as of 2022, an increase of 8% over the previous year. Australia, which enjoyed this market for a period is currently the top supplier of oranges. China, the United States, and Japan are additional exporters to Vietnam.

Author: Mr Thabile Nkunjana is a Senior Economist under the Trade Research Unit at the National Agricultural Marketing Council. he can be contacted at thabile@namc.co.za or (012) 341 1115.

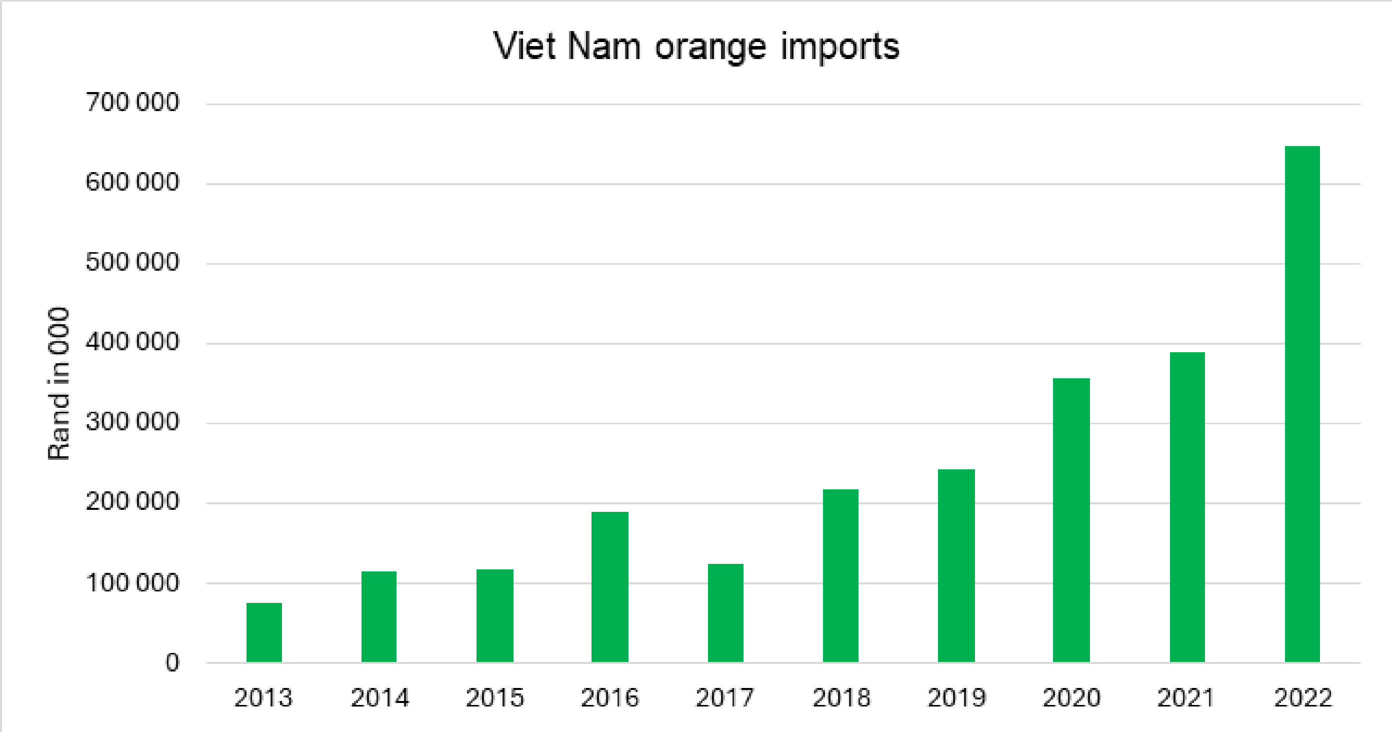

Figure 1: Vietnam's orange imports between 2013 and 2022 in value (Rand)
Source: Trade Map (2024).

CONCLUSION

Opening new markets is difficult, particularly for governments because discussions are frequently halted by countries to temporarily address their specific needs. Before going on to other things, including reaching market norms, it takes months to converse alone. The trade of citrus products, particularly oranges, is expected to increase in South Africa as a result of this deal with Vietnam. But this will become apparent in the upcoming months and years, particularly in light of the uncertainty that South Africa's citrus industry is currently facing from its biggest market, the EU. Additionally, the rate at which Egypt's supply to the Vietnamese market grows will dictate how quickly South Africa's exports take off and start to show a profit. Egypt's orange exports have climbed by 226% over the last five years, compared to a 93% growth in those of Australia, a major supplier.

UNLOCKING OPPORTUNITIES FOR SOUTH AFRICAN MACADAMIA NUT EXPORTS THROUGH EXISTING TRADE PROTOCOLS AND AGREEMENT

By Lwazi Dladla, Bernard Manganyi, Lesedi Mokoena and Thulani Ningi

INTRODUCTION

South Africa, a leading exporter of both shelled and in-shell macadamia nuts, heavily relies on trade agreements to access global markets. With macadamias identified as having the highest export potential among edible nuts (Sithole, 2009), the industry, though young, has proven to be highly lucrative, contributing 27% to global production in 2014 (Scheepers et al., 2018). Globally classified as one of the "small four" nuts, macadamias offer significant opportunities for smallholder inclusion and regional value chain development in Southern Africa (Parshotam, 2018).

Beyond Africa, South Africa enjoys preferential market access through agreements such as the Generalised System of Preferences (GSP) schemes and the African Growth and Opportunity Act (AGOA), with the European Union (EU) also serving as a key trading partner under the Southern African Development Community (SADC)-EU Economic Partnership Agreement (SADC-EU EPA). In 2023, South Africa's macadamia nut exports reached a value of USD 132.7 million, accounting for about 93% of total production, underscoring the vital role trade agreements play in market access and export performance. This article, therefore, explores how existing trade protocols are unlocking opportunities for the growth and success of South Africa's macadamia nut industry.

GLOBAL EXPORTS OF SHELLED AND IN-SHELL MACADAMIA NUTS FROM SOUTH AFRICA

South Africa plays a crucial role in the global macadamia nut market. Figure 1 illustrates the annual export quantities of both shelled and in-shell macadamia nuts from 2019 to 2023, measured in tons. In 2019, shelled macadamia nut exports were recorded at 16 268 tons and remained the highest recorded level until 2023. In 2020, exports declined significantly to 12 535 tons, reflecting a 22.9% drop. This downward trend continued in 2021, with a further reduction to 12 054 tons. In 2022, exports experienced a modest recovery, rising to 12 686 tons, a 5.3% increase from 2021.

This decline aligns with broader trends observed during the pandemic, which caused a 13.19% drop in exports across various sectors, including agriculture, directly impacting macadamia exports (Erero and Makananisa, 2021). However, in 2023, exports surged to 19 289 tons, marking a 49.9% increase from 2022 and reaching the highest level within the five-year period. Meanwhile, global in-shell macadamia exports consistently increased, culminating in a peak of 43 135 tons in 2023, the highest recorded during this period.

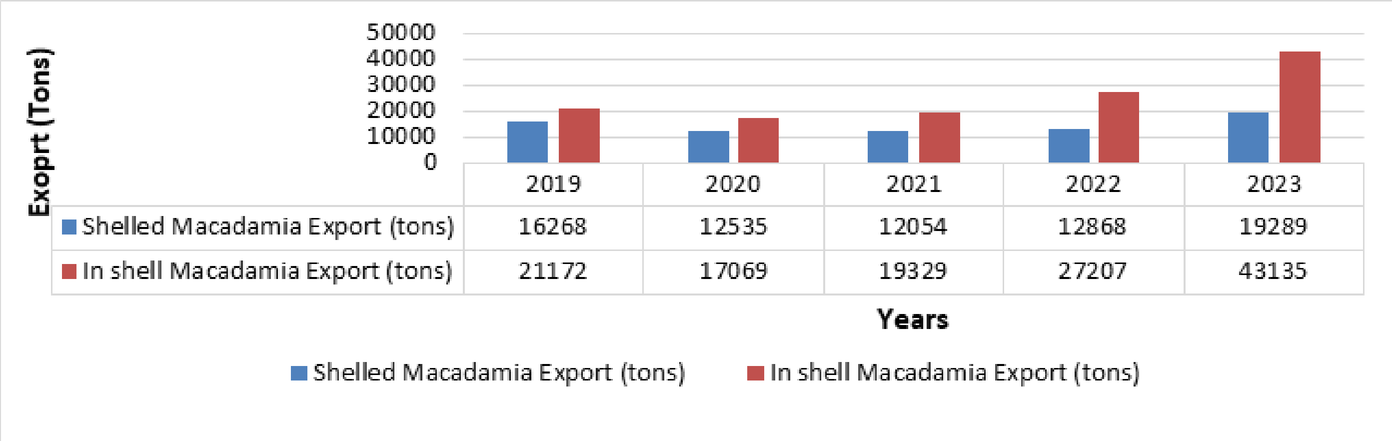

Figure 1: Global exports of shelled and in-shell macadamia nuts from South Africa

Source: Trade Map (2024)

TOP IMPORTERS OF SOUTH AFRICAN SHELLED MACADAMIA NUTS

The United States of America (USA) remains the largest market for South African macadamias, accounting for USD 35.3 million or 27% of total exports. This significant share is facilitated by AGOA, which grants South African products duty-free access to the USA market. China is the second-largest market for South African macadamia nuts, with exports reaching a value of USD 29.6 million and 7 284 tons. Germany and the Netherlands are key European markets for South African macadamia nuts. Both countries benefit from preferential trade terms under the SADC-EU EPA. This agreement has significantly improved market access for South African macadamia nuts in Europe by reducing tariffs and boosting export volumes. Spain is another important market, importing USD 6.7 million worth of macadamias, also benefiting from the trade agreement. For in-shell macadamia nuts China, Lithuania and USA are leading in terms of imports.

Table 1: Top importers of South African shelled macadamia nuts (HS Code: 0802.62) in 2023

Importers	Value exported in 2023 (USD)	Trade Balance 2023 (USD)	Quantity Exported in 2023	Share (%)	Growth in exported value between 2022-2023 (%)
World	132 686	131 988	19 289	100	-32
United States of America	35 334	35 334	4 117	27	-127
China	29 552	29 340	7 284	22	55
Germany	11 196	11 196	1 205	8	-23
Netherlands	8 343	8 228	1 089	6	-32
Spain	6 730	6 730	653	5	-25
Taipei, Chinese	5 023	5 023	575	4	24
Belgium	4 665	4 665	486	4	-51
Vietnam	3 830	3 830	469	3	-30
Japan	3 642	3 642	390	3	-105
United Arab Emirates	3 311	3 311	350	2	28

Source: Trade Map (2024)

TRADE PROTOCOLS AND AGREEMENT OPPORTUNITIES FOR SOUTH AFRICAN MACADAMIA NUTS

South Africa's proactive approach to international trade has significantly benefited its macadamia nut industry. Notably, key trade agreements and protocols have spurred considerable growth in exports. Shelled macadamia nut exports surged from 12 054 tons in 2021 to 19 289 tons in 2023, reflecting a substantial 60% increase over two years. This growth is closely linked to trade agreements such as the AGOA, which grants eligible sub-Saharan African countries duty-free access to the USA market for over 1 800 products, and the GSP program, which covers more than 5 000 products. Additionally, bilateral agreements with China and the EU have further reduced tariffs and enhanced market access. In-shell macadamia nut exports experienced an even more impressive rise, from 27 207 tons in 2022 to 43 135 tons in 2023, marking a 58.5% increase. These figures highlight the success of these trade agreements in opening up new opportunities and boosting South Africa's competitiveness in key markets like China and the United States.

CONCLUSION

South Africa's macadamia nut industry stands at a pivotal moment, poised for substantial growth driven by several key factors. The introduction and maintenance of existing trade protocols and agreements has created significant opportunities for expanding macadamia nut exports. The notable rise in export volumes to major markets such as the USA, China, and the EU, coupled with the favourable trade conditions established by these agreements, underscores their positive influence on the industry. South Africa's strategic engagement in global trade has effectively positioned its macadamia nuts as a competitive force on the international stage. To capitalise on these opportunities, exporters must navigate complex regulations, uphold high-quality standards, and compete effectively in the global market. While challenges remain, the overall outlook for the industry is optimistic. By leveraging the benefits of existing trade agreements and addressing associated hurdles, South Africa has the potential to enhance its status as a leading player in macadamia nut production and export.

Author: Mr Lwazi Dladlais an Economist under Agro-Food Chains Unit at the National Agricultural Marketing Council. He can be contacted at ldladla@namc.co.za or (012) 341 1115.

Author: Mr Bernard Manganyi is an Agricultural Economist under Smallholder Market Access Unit at National Agricultural Marketing Council. He can be contacted at bmanganyi@namc.co.za or (012) 341 1115.

Author: Mr Thulani Ningi is an Economist under Agro-Food Chains Unit at the National Agricultural Marketing Council. He can be contacted at tningi@namc.co.za or (012) 341 1115.

Author: Ms Lesedi Mokoena is an Economist Intern under Markets Economics Research Centre at the National Agricultural Marketing Council. She can be contacted at lmokoena@namc.co.za or (012) 341 1115.

BOOSTING MUNG BEAN EXPORTS: LEVERAGING TRADE AGREEMENTS TO POSITION SOUTH AFRICA AS A KEY GLOBAL PLAYER

By Nokuthula Khulu and Lesedi Mokoena

In recent years, South Africa has concluded several trade protocols and agreements aimed at expanding its agricultural export footprint. This exploration focuses on the growing export and production opportunities for mung beans, a crop that has gained prominence due to its nutritional benefits and adaptability to local conditions. Mung beans, also known as green grams, are primarily cultivated in Limpopo and Mpumalanga. The main varieties grown are Berken and Tex sprout, which thrives in drought resistant environments and are utilized in various products such as flour, soup, and vegetable processing (Selina Wamucii Insights, 2024).

Globally, the mung beans market is projected to grow significantly, driven by the rising interest in plant-based diets and the rising demand for healthier food options (CBI Ministry of Foreign Affairs, 2023). Notably, the recent approval of mung bean protein isolates by the United Kingdom, coupled with the European Food Safety Authority's recognition of its safety; it provides South African producers with a strategic opportunity to tap into the European niche market and potentially secure higher prices for their products (CBI Ministry of Foreign Affairs, 2023).

Author: Ms Nokuthula Khulu is an Economist Intern under Markets Economics Research Centre at the National Agricultural Marketing Council. She can be contacted at nkulu@namc.co.za or (012) 341 1115.

Author: Ms Lesedi Mokoena is an Economist Intern under Markets Economics Research Centre at the National Agricultural Marketing Council.She can be contacted at lmokoena@namc.co.za or (012) 341 1115.

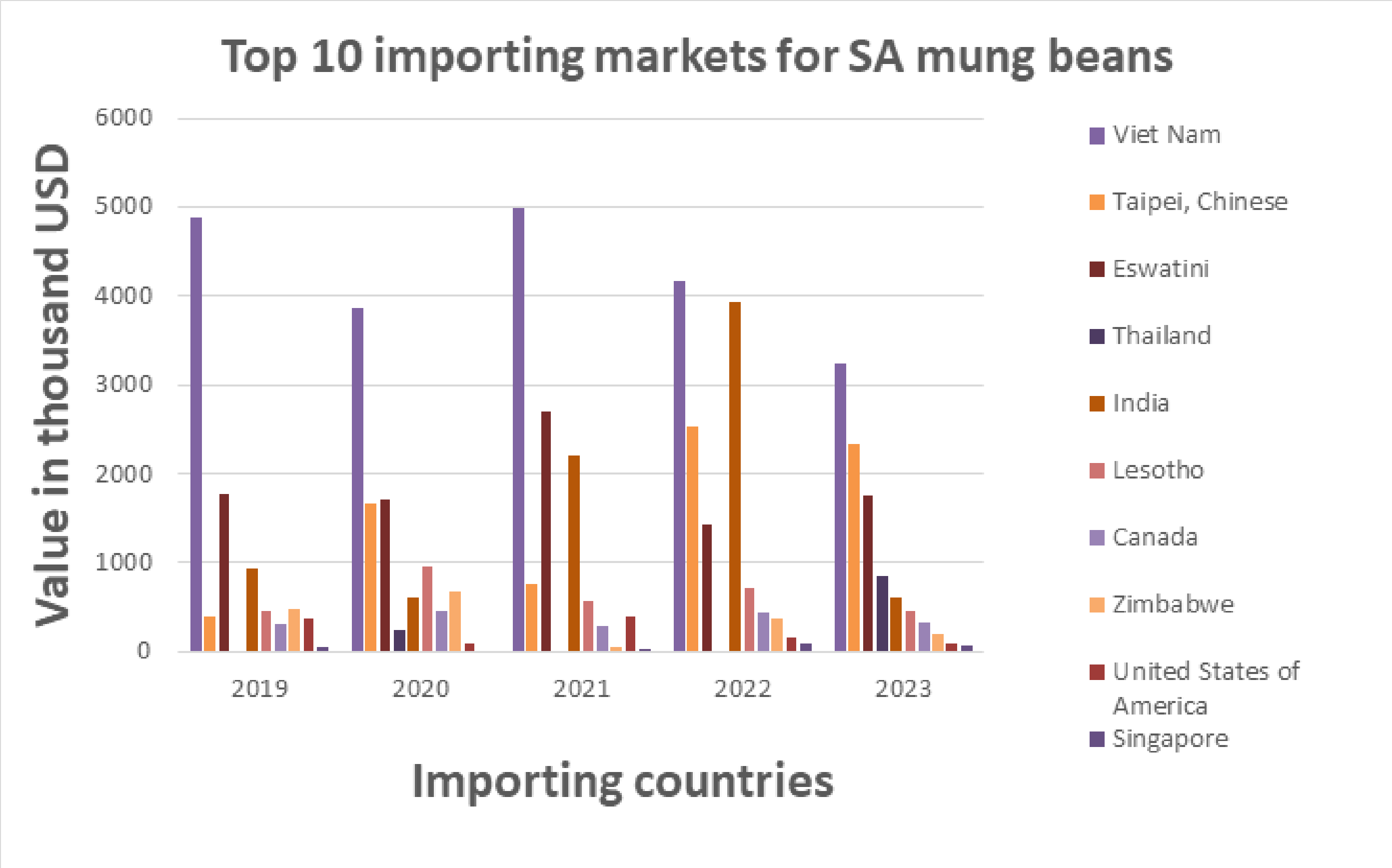

Figure 1: Top 10 importing markets for SA mung beans HS 0713.31, 2019-2023
Source: Trade Map (2024)

The recent trade agreements are expected to bolster mung bean production and export by improving market access and streamlining export processes. As reflected in Figure 1, Vietnam consistently leads as the dominant importer, with its import share surpassing 90% in 2023. Other markets, such as Thailand, India, and the United States, show notable increases in demand, particularly from 2021 to 2023, signaling growing international interest in South Africa mung beans. These trends underscore the importance of capitalizing on expanding global demand, especially in Asia and North America, to bolster South Africa's export potential (Credence Research, 2024).

To capitalize on these new opportunities, it is essential to implement strategies that enhance production and export capabilities. This includes providing training and resources to local farmers to improve cultivation practices and yields. Collaborating with agricultural extension services can facilitate training programs focused on best practices in mung bean cultivation, pest management, and post-harvest handling (Dikr, 2023). Implementing financial support programs, such as subsidies for high-quality seeds and irrigation systems, can further enhance production capabilities. Participation in international trade fairs, such as the International Mung Bean Congress, can assist with connecting South African producers with potential buyers and distributors, facilitating market entry and expansion.

Additionally, engaging in trade negotiations to secure favorable export terms, such as reduced tariffs and improved access to Asian, European, and Middle Eastern markets, will be highly beneficial for South Africa's mung bean industry. The European Union (EU) represents a critical market for plant-based products. Under the Economic Partnership Agreement (EPA) between the EU and the Southern African Development Community (SADC), which includes South Africa, agricultural products like legumes and mung beans can enter the EU with reduced or zero tariffs. This agreement makes the EU a lucrative market, particularly in countries such as the Netherlands, Germany, and the UK, where plant-based diets are increasingly popular (CBI Ministry of Foreign Affairs, 2023). The United States is also a significant importer of legumes and offers duty-free access under the African Growth and Opportunity Act (AGOA). As a beneficiary of AGOA, South Africa enjoys tariff-free access for its mung beans into the United States market, providing a competitive edge (AGOA, 2023). South Africa could also target regional markets within Africa, where import tariffs are generally low. Utilizing existing trade agreements like the African Continental Free Trade Agreement (AfCFTA), countries like Botswana, Namibia, and Eswatini can facilitate intra-African trade, with import tariffs averaging less than 5% (World Bank , 2024). This strategic approach not only enhances market access but also positions South Africa to capitalize on the growing demand for mung beans in both local and international markets (Benson, 2022).

In conclusion, the new trade protocols, agreements and the rising global demand for mung beans present a significant opportunity for South Africa's agricultural sector. By focusing on quality, sustainability, and effective marketing strategies, securing favorable export terms, targeting both international and regional markets, the country can maximize these opportunities and ensure the successful export of this valuable crop.

TRADE PROFILE OF EXTRA VIRGIN AVOCADO OIL

By Bhekani Zondo, Phelelani Sibiya & Lwazi Dladla

PRODUCTION

South Africa is a notable producer of avocados, which has facilitated the growth of the avocado oil industry. Table 1 below illustrates South Africa's avocado production and processing of avocado oils. In 2023, South Africa produced about 154 949 tons of avocado of which about 2 969 tons were processed to avocado oil. In 2018, South Africa's avocado production was at its highest at about 169 243 tons, although declining sharply to about 121 156 tons in 2019. However, since 2019 South Africa has seen its production of avocado increasing notably to about 154 949 tons in 2023.

In terms of avocado oil processing, during the period under consideration there has been a decline in terms of processed avocado oil. Table 1 shows that processed avocado oil declined from about 8 696 tons in 2014 to about 2 969 tons in 2023. This is equivalent to a decline of 66%, while production increased by 15%. Over the past decade, the highest volume processed was 8,696 tons in 2014, while the lowest was 1,828 tons in 2017. This fluctuation highlights the variability in production, influenced by factors such as weather conditions which affects avocado yields.

Table 1: Avocado production and processing for oil in South Africa 2014 - 2023

YEAR	Total Production (tons)	Avocado Processed for Oil (tons)
2014	135 262	8 696
2015	114 112	4 228
2016	122 043	6 063
2017	101 377	1 828
2018	169 243	8 399
2019	121 156	3 763
2020	135 315	6 608
2021	135 742	4 745
2022	148 681	5 587
2023	154 949	2 969

Source: SAAGA (2024)

GLOBAL TRADE MARKET ANALYSIS

Table 2 below shows the top 10 global exporters of extra virgin avocado oil (classified under HS Code 151590) between 2019 and 2023, expressed in value terms and measured in thousand Rands. In 2023, the world exports of avocado oil were valued at R 44.1 billion, with the leading (top 10) exporters accounting for an aggregate share of about 64 % of the market share of world exports. Topping the list was the United States of America (USA) with a global export market share of 11%, followed by Mexico (10 %) and Italy (8%). Other countries making the list of the top 10 world exporters were Spain exporting avocado oil worth a value of R3 billion followed by Netherlands (R 2.5 billion) and Denmark (R2 billion), among others.

The analysis shows that avocado oil exports have grown by 57% between 2019 and 2023 from a value of about R28.2 billion. The United Kingdom (UK) experienced the highest growth rate of about 183% during this period, followed by Mexico (146%), Ghana (105%), Italy (97%), Spain (94%), and Netherlands (93%), among others.

Table 2: World's leading exporters of avocado oil (HS Code 151590) in 2023

Exporters	Exported Value in 2019 (Rand)	Exported Value in 2023 (Rand)	Share (%)	Growth Rate (%)
World	28 155 158	44 154 294	100	57
United States of America	3 750 650	4 644 358	11	24
Mexico	1 781 748	4 389 966	10	146
Italy	1 788 907	3 528 679	8	97
Spain	1 565 380	3 038 972	7	94
Netherlands	1 316 104	2 546 537	6	93
Denmark	1 809 373	2 338 574	5	29
Ghana	1 062 557	2 180 339	5	105
France	1 452 642	2 158 185	5	49
United Kingdom	644 427	1 824 058	4	183
China	1 341 882	1 470 449	3	10

Source: Trade Map (2024)

Table 3 presents the list of the top 10 leading importers of avocado oil between 2019 and 2023, expressed in value terms, expressed in South African Rands. Avocado oil exports recorded a 72% growth rate during this period under consideration, growing from a value of R32.4 billion in 2019 to R55.7 billion in 2023. The USA is currently the leading importer of avocado oil accounting for a share of 19% of the value of world imports in 2023, followed by France (8%), Netherlands (6%), Japan (5%), and Slovakia (4%), among others. Although Slovakia has the least market share of imports, it has experienced the highest growth rate of imports during this period growing by 12 587% followed by Spain (267%), Italy (240%), USA (113%), Japan (106%), and France (85%).

Table 3: World's leading importers of avocado oil between 2019 and 2023

Importers	Imported Value in 2019 (Rand)	Imported Value in 2023 (Rand)	Share (%)	Growth Rate (%)
World	32 399 308	55 726 326	100	72
USA	4 972 910	10 579 661	19	113
France	2 537 541	4 697 975	8	85
Netherlands	1 851 662	3 124 918	6	69
Japan	1 374 328	2 834 751	5	106
Slovakia	18 951	24 043 56	4	12587
Italy	650 027	2 212 244	4	240
Spain	563 024	2 066 174	4	267
China	1 360 212	1 998 033	4	47
Sweden	1 404 392	1 827 689	3	30
Korea, Republic of	1 054 950	1 778 053	3	69

Source: Trade Map (2024)

South Africa is a net exporter of avocado oil. Figure 1 below depicts the trade of South Africa's avocado oil (exports, imports, and trade balance). The analysis shows that there is an increasing trend in South Africa's avocado oil export since 2016, while imports have been rather fluctuating. Between 2016 and 2023, the value of avocado oil exports increased from a value of R53.3 million to R140.5 million. This represents a growth rate of approximately 62% during this period. Currently, the USA is the main destination for South Africa's avocado oil, and it accounted for a share of 21% of total exports, followed by Lesotho (18%), and Germany (12%), among others. South Africa's imports of avocado oil declined by 1% during the period under consideration. The observed decline in imports coupled with the rapid increase in exports, has seen South Africa move from a negative trade balance between the years 2016 and 2017 to a positive trade balance worth a value of R74.6 million in 2023. This represents an increase of

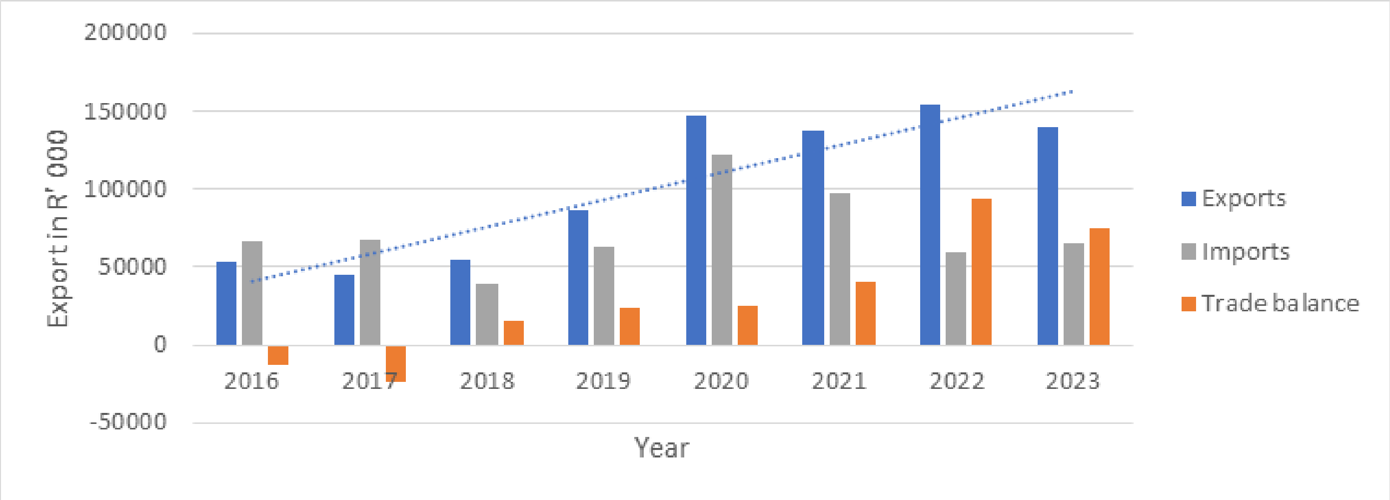

Figure 1: South African avocado oil trade with the world
Source: Trade Map (2024)

Table 4 below illustrates the top ten avocado oil importing countries that have the export potential for the South African avocado oil industry.

Table 4: Export opportunities for South Africa's avocado oil

Importers	Actual Export US$'000	Export potential US$'000	Unrealized Potential US$'000
USA	1 400	1 600	216
Lesotho	1 100	1 400	309
Netherlands	736	827	91
Botswana	629	731	103
DR Congo	60	558	499
Japan	35	541	406
China	128	537	410
Germany	1 600	527	-
Malaysia	121	499	378
Australia	118	261	143

Source: Trade Map (2024)

The results show that the USA has the highest export potential of a value of US$ 1.6 million for the South African avocado industry compared to the actual value of exports valued at US$ 1.1 million. Countries with high unrealized potential are DR Congo with an unrealized potential of US$ 499 000, followed by China (US$ 410 000), Japan (US$406 000), Malaysia (US$ 378 000) and Lesotho (US$ 309 000) respectively.

CONCLUSION

Over the past decade, South Africa's avocado production has increased, while local avocado oil processing has declined. Despite this, the country has shifted from being a net importer to a net exporter of avocado oil since 2028, with a growing positive trade balance. South Africa's avocado oil exports are diverse, with key markets including the USA, Netherlands, DR Congo, and China. The DR Congo shows the highest unrealized export potential, followed by China, Japan, Malaysia, Lesotho, and the USA. Leading global exporters of avocado oil include the USA, Mexico, and Italy, while top importers are the USA, France, and Japan.

Author: Mr. Bhekani Zondo is an Economist under the Trade Research Unit at the National Agricultural Marketing Council. He can be contacted at bzondo@namc.co.za or (012) 341 1115.

Author: Ms Phelelani Sibiya is an Agricultural Economist Intern under MERC at National Agricultural Marketing Council. She can be contacted at tramapelo@namc.co.za or (012) 341 1115.

Author: Mr Lwazi Dladla is an Intern Economist under Agro-Food Chains Unit at the National Agricultural Marketing Council. He can be contacted at ldladla@namc.co.za or (012) 341 1115.

THE TOBACCO INDUSTRY IN SOUTH AFRICA MIGHT BE BECOMING LESS COMPETITIVE!

By Thabile Nkunjana

The South African tobacco industry used to be one of the most promising, but it is currently becoming a shell of its former self. Tobacco was once produced by many farmers, who sold it to manufacturers for processing, providing a living for themselves, their families, and farm labourers. However, in addition to sin tax, the industry's growing troubles are having a negative impact on local production, exports, and consequently, foreign earnings.

According to British American Tobacco South Africa (BATSA), the illicit market throughout the country costs the nation R24 billion in lost tax revenue annually. A lot of farmers have also stopped growing tobacco, which could cause production to fall and, as a result, increase imports of raw tobacco, mostly from neighbouring countries. The long-standing sin tax was increased once more in 2024, this time by 4.7% for combustible cigarettes and cigarette tobacco and 8.2% for pipe tobacco and cigars. The local tobacco industry is dealing with a number of issues that are making it less competitive and endangering its survival. While the industry is directly impacted by these problems, the focus of this article is on the trade performance of tobacco and its products, with an analysis of import and export data and the presentation of patterns in numerical or percentage form.

SOUTH AFRICA'S TOBACCO AND MANUFACTURED TOBACCO IMPORTS AND EXPORTS

The value (USD) of South Africa's imports and exports of manufactured tobacco and tobacco products from 2004 to 2023 is shown in Figure 1. Both imports and exports have increased during the examined period, which runs from 2004 to 2023. According to data from Trade Map (2024), exports climbed by 20.2% from USD120.8 million to USD145.2 million, while imports increased by 58.2% from USD135.4 million to USD214.2 million.

Author: Mr Thabile Nkunjana is a Senior Economist under the Trade Research Unit at the National Agricultural Marketing Council. he can be contacted at thabile@namc.co.za or (012) 341 1115.

IMPORTS

China, Switzerland, and Zimbabwe are South Africa's top suppliers of tobacco and its derivatives, contributing 28%, 26%, and 24%, respectively of the total value of imports in 2023. In addition to processed tobacco imports, the country also imports a sizable amount of unprocessed tobacco. Cigars, cheroots, cigarillos, and cigarettes made of tobacco or tobacco substitutes are mostly imported from Switzerland, accounting for at least 86% of supply in 2023. China leads in inhalers, accounting for 92% of South Africa's imports for USD64.4 million in 2023. As already mentioned, that South Africa imports a lot of raw tobacco from Zimbabwe, most likely due to its close proximity to Zimbabwe which produces a sizable amount of tobacco regionally. Zimbabwe contributed 65% and 62% of South Africa's 2022 and 2023 global imports of unprocessed tobacco or tobacco refuse, which totalled USD43.2 million and USD81.0 million, respectively (Trade Map, 2024).

EXPORTS

Tobacco and its products exports grew by 20.2% in South Africa over the previous 20 years, but since 2017, they have been declining. Its revenue decreased by 33.3% from USD217.8 million to USD147.4 million between 2019 and 2023 (Trade Map, 2024). Normally, the decline in exports is due to a variety of market factors. For instance, a product's exports may drop as a result of contracting markets or a general loss in demand brought on by competition from substitutes. Even though these could be the reasons behind South Africa's declining tobacco exports, something else is stealing the tobacco market from the official industry and hence the market.

Namibia is the leading buyer of South Africa's tobacco accounting for at least 20% in 2023 followed by Indonesia (10%), Congo (10%), Botswana (7%), Lesotho (7%), Mozambique (6%), DRC (5%), United Arab Emirates (5%), Zambia (4%), and Eswatini (3%).

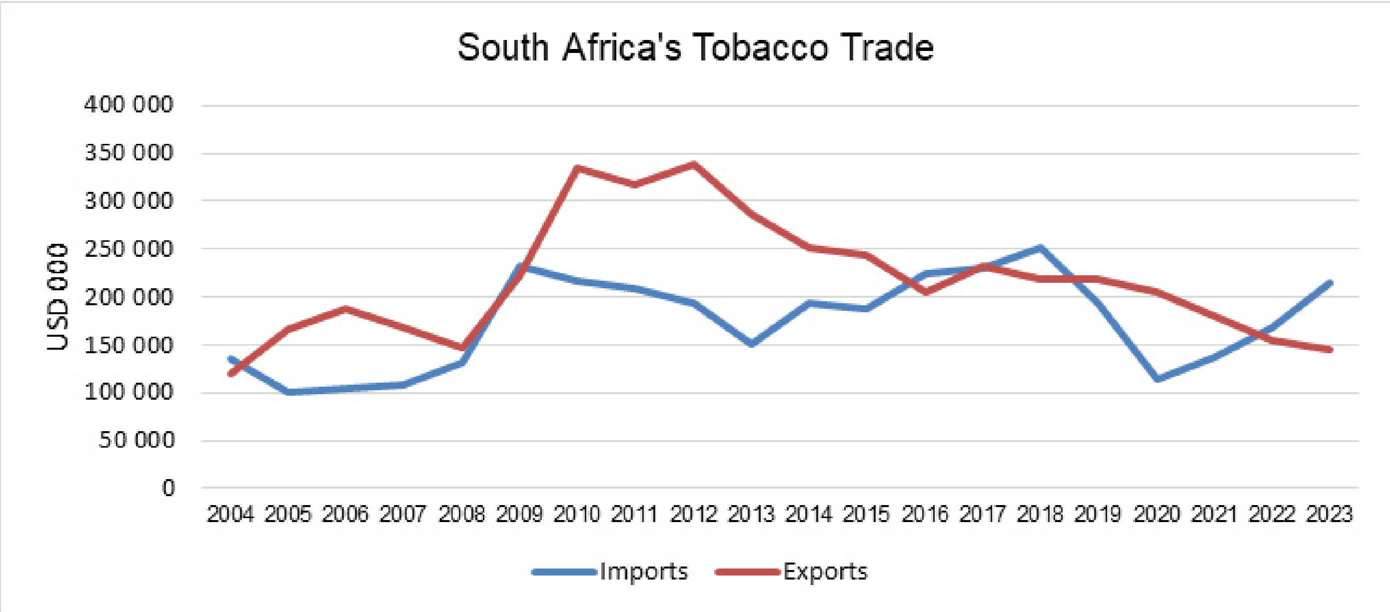

Figure: South Africa's tobacco imports and exports

Source: Trade Map (2024)

CONCLUSION

Trade data typically displays a country's products imports and exports. Analysts can determine if imports and exports of that product are growing or declining based on this type of data. This provides a high-level overview of being done to ensure the industry succeeds, which might result in a decrease in exports, or the difficulties it faces, which could result in an increase in imports to sustain local supply. The tobacco industry in South Africa is probably going to have problems with the latter. While exports of tobacco and related products started to decline in 2017, the same pattern was observed in imports in 2018, but 2020 a notable increase was noted. The 33.3% drop in exports from 2019 to

2023 suggests a more serious market problem that might have gotten out of hand during the Covid-19 lockdowns and the following years on the value chain.

Since tobacco was deemed a non-essential product, sales were prohibited during the severe lockdown. The way that people occasionally use tobacco caused the government to worry that the Covid-19 might become out of control. State officials, who wished to protect the country's health system from the strain of an increasing number of Covid-19 cases and hospital admissions, had good intentions when they imposed the ban. Sadly, many would not give up smoking, and this would have resulted in the emergence of new, illicit tobacco supply channels and uncontrollably growing black market supply chains. Since then, it seems that the government has been having difficulty keeping this under control, which is hurting the profitability of growing and selling tobacco.

An industry that is already under pressure is being burdened by the sin tax, which is rising virtually annually. The fact that so many farmers are reportedly giving up on tobacco production suggests that this sector is desperate for some respite, and the fact that exports are declining while imports are rising quickly points to even more serious underlying problems farther down the supply chain.

ACCELERATED PRODUCTION CAPACITY AND LEVERAGING ON TRADE AGREEMENTS MAY ENHANCE THE PERFORMANCE OF THE SOUTH AFRICAN POULTRY TRADE

By Lucas Moswane and Solly Molepo

Author: Mr Lucas Moswane is an Economist Intern: South African Poultry Association. He can be contacted at Lucas@sapoultry.co.za

Author: Dr Solly Molepo is a Manager under MERC: Trade Research at the National Agricultural Marketing Council. He can be contacted at smolepo@namc.co.za or (012) 341 1115.

South Africa has entered into various free trade agreements as well as the preferential trade agreements with their trading partners over the years and it is also forming part of the beneficiaries of the African Growth Opportunity Act (AGOA) as well as the Generalised System of Preferences (GSP) which are non-reciprocal trade agreements.

Despite the numerous lists of trade agreements that the country has put in place, the South African poultry trade has been performing poorly over the years, where only 2% of the total production was exported and the top importing countries are part of the Southern African Customs Union because the union aims to provide duty free movement of goods in the partner countries. The current trade agreement policies contributed greatly on the steady growth of the South African exports over the years. some of the countries that were the importing poultry products from South Africa were mainly those from the SADC region like Botswana, Namibia and Mozambique. In this case the trade was facilitated by the conveniency that is brought by the SADC Free Trade Area which allows for a free trade access goods traded within the region. Furthermore the Africa Growth and Opportunity Act (AGOA) has presented has also presented an opportunity for the South African poultry producers to have access to the market in the United States , however the local producers have not been able to use this opportunity to their advantage due to challenges that faced by the industry including meeting the standards set by the importing countries while on the other hand countries like Brazil and the other EU countries enjoy the benefits of the Preferential Trade Agreements.

The South African Poultry Association (SAPA) is aiming to increase the export of the poultry products by exporting the minimum of 3% and at most 5% of the total production and the potential markets that have been identified include the countries that form part of the African Continental Free Trade Area (AfCFTA), the European Union (EU), as well as the United Arab Emirates (UAE). There is a Free Trade Agreement called the Trade, Development and Cooperation Agreement (TDCA) that facilitate trade between South Africa and European Union (EU), the terms of the agreement were that the European Union will ease 95% of its duties on the products that are imported from South Africa and in turn South Africa will ease 86% of its duties on products that are imported from the EU. This trade agreement is more likely to benefit the South African poultry trade by increasing its exports, since the top four countries that import poultry products which are Germany, France, United Kingdom, Netherlands, are part of the European Union (UN), the aggregate of these four countries alone makes up 23.1% of the world poultry imports. The value of the South African export potential marked for the product code (HS: 0207.13) in these countries is estimated at R5 819 644, R4 626 342, R5 911 437 and R5 874 720 respectively.

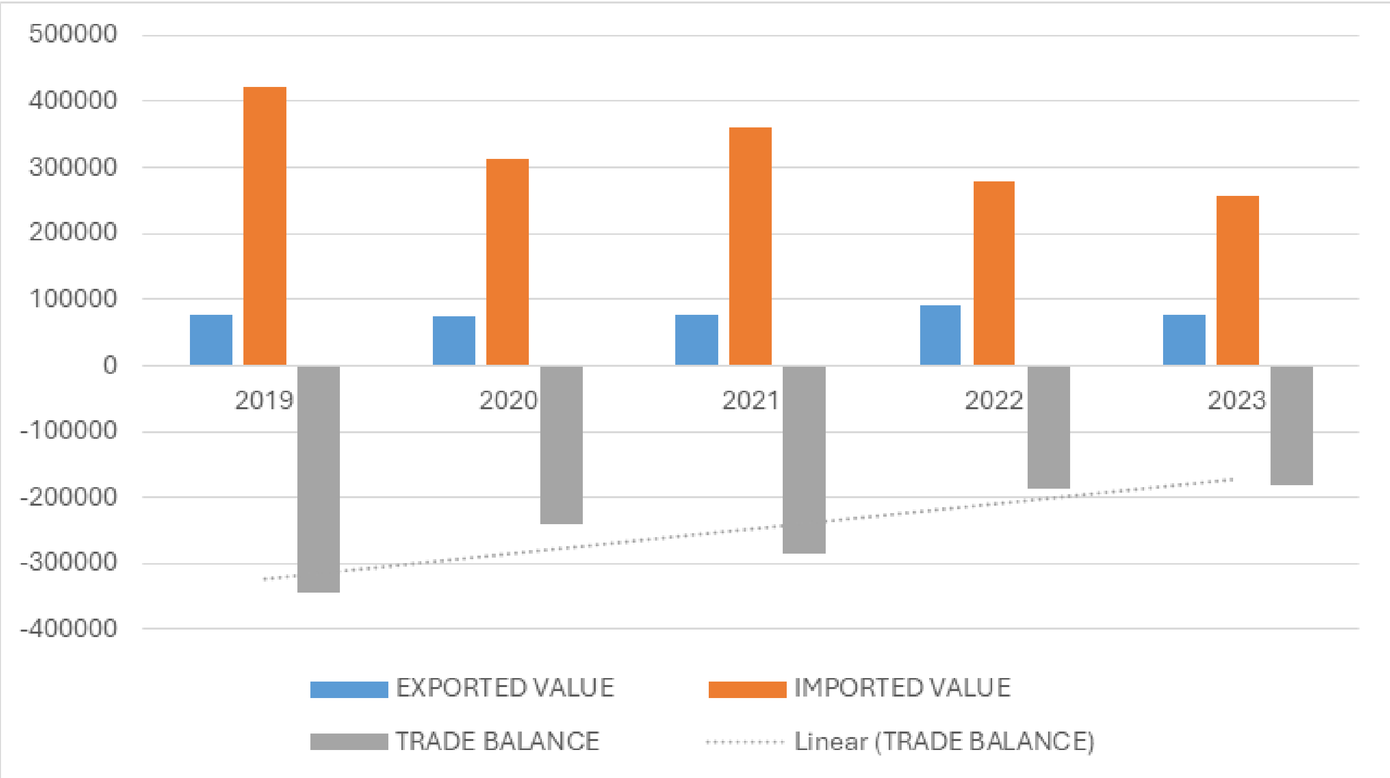

Figure 1: The graphical presentation of the South African poultry trade performance.
Source: Trade Map (2024)

The graph above shows that the export value of the poultry products in South Africa for the past five years has been lower than the import value, resulting in a negative trade balance. The negative trade balance indicate that South Africa is the net importer of the poultry products. Although the graph depicts a significant decline in imports from 2019 to 2020 and from 2021 to 2023, these imports declined in a rate that is less than the growth rate of the export hence the value of the net trade remained negative throughout the years.

CONCLUSION

There are several trade agreements that are in place that have the potential to enhance the trade performance of the poultry industry including the Economic Partnership Agreement (EPA) which offers South Africa a tariff free access to EU under EPA preferences margin which are equivalent to the Most Favourable Nation rates (MFN) and there is a potential export market that is estimated at R 22 232 143 for a single product in the European Union (EU). However there has been other challenges that continues to confront the local producers in terms of exporting their products and one of the biggest challenges is compliance with the standards set by the EU as alluded by the South African Poultry Association (SAPA) in their 2023 report. The industry furthermore stipulated that the process of expanding their export has been slow due to an inadequate veterinarian capacity which will be responsible throughout the value chain in terms of providing necessary certification such as the phytosanitary certifications as one of the main criteria for importing to the European Union. In the light of the above information, it can be concluded that an accelerated production capacity and leveraging on trade agreements will have a significant impact on the trade performance of the South African Poultry industry.

SOUTH AFRICA GREENLIGHTS BRAZILIAN MAIZE IMPORTS

After several weeks of back-and-forth communication, the South African Cereals and Oilseeds Trade Association (SACOTA), received confirmation from the Department of Agriculture that Brazilian maize imports are now permitted. This is an important step forward in ensuring food security in South Africa this season.

Due to a decrease in local yellow maize production and an increase in maize prices, it became evident several months ago that South Africa might need to import yellow maize. On the Johannesburg Stock Exchange December traded yellow maize futures contract, prices increased from approximately R3 800 in January to R4 700 in May of this year, an increase of 19%. Local prices have since decreased somewhat due to lower international prices and a firmer Rand.

Available at: https://agriorbit.com/south-africa-greenlights-brazilian-maize-imports/.

STRONGER TRADE RELATIONS FORGED BETWEEN SOUTH AFRICA AND CHINA

South African President Cyril Ramaphosa and the President of the People's Republic of China, Xi Jinping, have agreed to elevate bilateral relationships between South Africa and China to a strategic co-operative partnership, underpinned by strong political ties, balanced trade and transformative economic growth. The agreement was reached on Monday, ahead of the Forum on China-Africa Cooperation Summit (FOCAC), themed "Joining hands to advance modernisation and build a high-level China-Africa community with a shared future".

According to a joint press statement, the heads of states agreed to deepen co-operation in traditional fields, such as agriculture, health, medical sciences and infrastructure development, but will further seize opportunities presented by the new scientific and technological revolution. They undertook to uphold the core values and basic principles of the World Trade Organization, oppose the decoupling and disruption of supply chains, resist unilateralism and protectionism, call for reform of the international financial system, and improve development financing for African countries to achieve common prosperity.

Available at: https://www.farmersweekly.co.za/agri-news/south-africa/stronger-trade-relations-forged-between-south-africa-and-china/.

THE EASING GLOBAL RICE PRICES WILL BENEFIT THE SOUTH AFRICAN CONSUMER

In all of our agricultural abundance in South Africa, rice is one of the crops we are not endowed with. We rely 100% on imports. We consume about a million tonnes of rice annually. We can't produce rice because of our relatively dry environment; we are generally a semi-arid country. Thailand is the leading rice supplier to South Africa, accounting, on average, for 74% of South Africa's rice import volume a year in the past five years. India is the second largest rice supplier to South Africa, boasting an average annual share of 21% over the past five years. Other rice suppliers to South Africa include Pakistan, Vietnam, China, Australia, the US, and Brazil.

Therefore, this reliance on imports means we should constantly monitor global price developments. Indeed, this time around, the rice price prospects look great globally.

The rice prices from various origins have moderated significantly from the higher levels we saw last year. This benefits the importers like South Africa. Moreover, the relatively less depreciated domestic currency will also help ease the costs of imported rice.

The global rice prices have softened, amongst others, because of the positive global production prospects for the 2024-25 season. The International Grains Council forecasts 2024-25 global rice production at 528 million tonnes, up 1% year-on-year.

Available at: **https://wandilesihlobo.com/2024/09/19/the-easing-global-rice-prices-will-benefit-the-south-african-consumer/.**

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NOTE:

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FOR CORRESPONDENCE:

Dr. Solly Molepo
SMolepo@namc.co.za
+27 (0) 12 341 1115

FOR ARTICLE CONTRIBUTION TO THE TRADE PROBE:

Mr. Bhekani Zondo
BZondo@namc.co.za
+27 (0) 12 341 1115

DESIGNED BY:
Mr Sylvester Moatshe
Smoatshe@namc.co.za
+27 (0) 341 1115