

South Africa's agricultural exports decline in 2015 – 24 August 2016

In 2015, South Africa's agricultural exports declined for the first time in 10 years, after a drier season. Overall, the country's agricultural exports slowed by 1.2%, declining from R106 billion in 2014 to R104 billion in 2015 (**Chart 1**). Africa remained South Africa's largest market, accounting for 45% of agricultural exports – which is 1% below the 5 year average share. The EU accounted for 27% of South Africa's agricultural exports in 2015, with Asia taking up 12%, and the Middle East 7%. The Americas and the rest of the world (ROW) accounted for 5%, of South Africa's agricultural exports, respectively (see **Chart 2**).

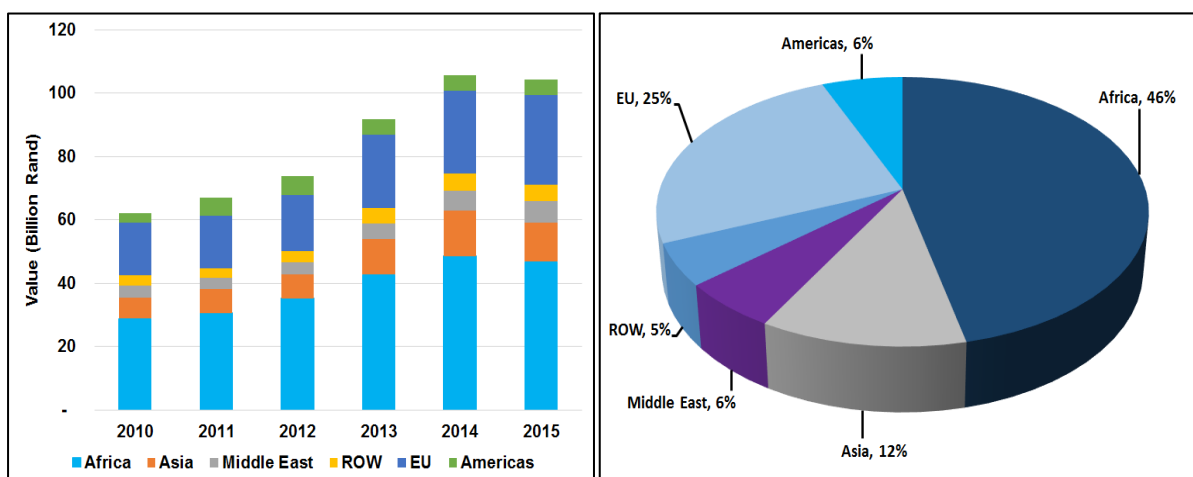


Chart 1: RSA's Ag exports per region (2010-2015) Source: ITC and Agbiz Research
Chart 2: Share of RSA Ag exports per region (2015) Source: ITC and Agbiz Research

ASIA: The sharpest decline was notably in Asia, where South Africa's agricultural exports fell 15%, from R14.4 billion in 2014 to R12.2 billion in 2015 (see **Chart 1**). Driving down the country's exports to Asia was the fall in cereal exports (mainly **maize**), which declined from R2.8 billion in 2014, to R380 million in 2015. Also, **crustaceans and frozen fish** declined by 20% over the same period – from R1.4 billion in 2014 to R1.1 billion in 2015. **Sugar** exports fell from just under a billion Rand to null over the same period.

AFRICA: Despite maintaining its status as the leading market for South African agricultural products, exports to **Africa fell 3.5%** - from R49 billion in 2014 to 47 billion in 2015 (see **Chart 1**). Driving this decline in exports was the sharp fall in **sugar and sugar confectionery** (which dropped 43%, from R3.9 billion in 2014 to R2.2 billion in 2014), **cereal exports** (which declined 20% from R5.1 billion in 2014 to R4.2 billion in 2015) as well as exports of **dairy products (and eggs, and honey)** - which fell 10% from 3.2 billion in 2014 to 2.9 billion in 2015.

MIDDLE EAST: Despite declining agricultural exports to Asia and Africa, South Africa's agricultural exports to the Middle East grew by 8.8%, from R6.3 billion in 2014 to R6.9 billion in 2015 (see **Chart 1**). The largest share of South Africa's agricultural exports to the Middle East are **edible fruits and nuts** which constitute 57% (R3.9

billion) of the country’s total agricultural exports to that region in 2015 – grew by 6%. **Beef** exports (fresh, chilled and frozen) more than doubled from R300 million to R650 million.

EUROPE: South Africa’s agricultural exports to Europe (EU28) firmed by 8.3%, from R26.2 billion in 2014 to R28.3 billion in 2015 (see **Chart 1**). **Edible fruits** accounted for 60% of the country’s agricultural exports to the EU, while 20% were **wines**. The former grew by 22%, driven to a large degree, by growth in **fresh grapes** and **oranges**. Fresh grapes increased by 40% from R3.9 billion in 2014 to R5.5 billion in 2015, while oranges grew from R2.2 billion to R2.7 billion over the same period.

AMERICAS: South Africa’s agricultural exports to the Americas fell by 2%, from just around R5 billion in 2014, to R4.9 billion in 2015 (see **Chart 1**). **Edible fruits** account for almost half of South Africa’s exports to the Americas, which grew from R1.8 billion in 2014 and R2.4 billion in 2015. **Wines** account for 24% of South Africa’s exports to the Americas, which fell by 17%, from R1.4 billion in 2014 to R1.1 billion in 2015.

Table 1: Regional classification

Region	Countries
Asia	Brunei, Cambodia, China, India, Japan, Laos, Malaysia, Myanmar, Indonesia, South Korea, North Korea, Singapore, Thailand, Taiwan, Vietnam
Africa	Sub-Saharan Africa, North Africa
Middle East	Bahrain, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Palestine, Qatar, Saudi Arabia, Syria, United Arab Emirates, Yemen
Europe	European Union (28)
Americas	NAFTA, MECOSUR, CARICOM countries
Rest of World	Eastern Europe (Russia, Ukraine etc.), Oceania (New Zealand, Australia)

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